



FROM INSIGHT TO INFLUENCE

SES Water Acceptability and Affordability Testing

Final Report

Version 2

Prepared for SES Water

Prepared by Impact

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All projects are carried out in compliance with the ISO
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1 Glossary of terms

Acronym	Explanation
HH	Household customers
NHH	Non-household customers
SES	SES Water

2 Executive summary

2.1 Background

SES Water (SES) is currently in the process of developing its PR24 business plan for 2025-2030, which will contain a framework for SES's future prices, investments and performance commitments.

With this in mind, and in adherence with guidance from Ofwat and CCW, SES commissioned Impact to conduct Acceptability and Affordability testing to be carried out for this price review, and to understand the views of customers on the proposed plan.

2.2 Method

To answer this objective, Impact conducted a qualitative phase of research, made up of two deliberative events, one with household (HH) customers and one with non-household (NHH) customers. In addition, there were 26 in-depth interviews with large businesses and customers unable to participate in online group discussions.

Following the qualitative phase, a quantitative phase was conducted, which contained an online/postal survey of 573 SES customers.

Stimulus materials were created for both phases to help distil information from the must-do and proposed business plan to customers clearly and concisely.

2.3 Key findings

- Knowledge of SES Water (SES) was high, with the majority of respondents knowing they are supplied with clean water by SES, but less knew they were not also responsible for the wastewater element.
- Customers were generally happy with the service received by SES, with few reporting having had issues, and those that have had issues being satisfied with how it was dealt with.
- There were a number of customers that had been impacted by the cost-of-living crisis, with many reporting increased financial strain, linked to higher food and energy bills. In the quantitative survey, 17% of customers reported they were finding it difficult.
- 27% of household (HH) customers and 58% of non-household (NHH) customers reported finding their current water bill easy to afford. This figure reduced to 3% among HHs that were struggling financially.
- Customers were supportive of the must-do plan, particularly around investing to ensure a resilient water supply and to try and reduce leakage.
- Customers were also largely in favour of the additional elements in the preferred plan, with many, again, wanting to see increased investment to reduce leakage, and also mitigate the impact SES were having on the natural environment.
- 66% of HHs in the quantitative survey, and 79% of NHHs reported the proposed plan to be acceptable. The main reasons were: support for what SES is trying to do in the long term and thinking the plan focused on the right areas.
- The preference for some customers was for bills to increase sooner rather than later, spreading the cost more evenly across generations, however, nearly half of HHs and a quarter of NHHs felt they didn't know enough to give an answer.

3 Background and Objectives

3.1 Background

SES Water (SES) is currently in the process of developing its PR24 business plan for 2025-2030 which will include the amount that they can charge their customers in delivering the plan. In adherence with guidance from Ofwat and CCW, Acceptability and Affordability testing with strict conformity to prescribed questions had to be carried out for this price review to maintain consistency across companies.

3.2 Objectives

The overarching objective of the research was the following:

“To meet Ofwat’s expectations for PR24 plan acceptability and affordability testing, and help create the right business plan for SES’s customers and communities.”

With this in mind, the following research objectives were developed:

1. Gather customers’ views, feedback and preferences on SES’s proposed PR24 business plan
2. Gather customers’ views, feedback and preferences on SES’s least cost (the ‘must do’) plan
3. Identify views on both plans from different perspectives i.e., household and non-household bill payers, future bill payers, vulnerable groups

4 Approach

An overview of the approach is given below:



At the beginning of the project, an inception meeting was held between SES and Impact to discuss the project, timelines, and immediate action points to kick off the project.

4.1 Qualitative method

Shortly after the inception meeting, Impact designed the pre-task, discussion guide and stimulus to be used with the qualitative groups and depth interviews. This followed guidance by Ofwat and CCW as well as input from SES, providing appropriate figures to be used in performance commitment charts as well as elements of the PR24 business plan and must-do plan.

The fieldwork then followed the approach laid out above, with the pre-task sent out to customers to familiarise themselves with SES, the price review process, SES’s performance commitments, and the proposed business plan. Online focus groups and in-depth interviews then followed, more details of which are given below. The groups aimed primarily to understand the level of support of various customer groups for the PR24 business plan.

4.1.1 Sample

A total of 43 customers attended 2 deliberative events held on May 30th and June 6th 2023, supplemented by 22 in-depth interviews conducted with customers in vulnerable circumstances and 4 with large businesses. One of the events contained household customers (HH) and one non-household customer (NHH).

Participants were invited to attend specific sessions based on their demographic profile. The table below shows the composition of each group.

Table 1: Qualitative sample

Group	Attendees	Customer type	Sub-group
1	34 HH	25 HH billpayers, 9 Future billpayers	Mix of circumstances including location, SEG, tenure and meter
2	9 NHH	Micro-organisations (NHHs with less than 10 employees)	Mix of industry and water dependency
In-depth interviews	22 HH	6 digitally excluded HH bill payers ¹ , 8 financially vulnerable HH bill payers, 8 bill payers with health vulnerabilities	Mixture of circumstances including location, SEG, tenure and meter
In-depth interviews	4 NHH	Larger organisations (NHHs with 10 or more employees)	Mixture of business size, industry and water dependency level

Due to the sample selection, interviewing methods, and sample size given above, the results are indicative and cannot be projected onto the overall population. This is a limitation of qualitative research in general, not one specific to this

¹ Completed over the phone due to lack of internet access

project, but the methods used are widely recognised and used to understand, in detail, the opinions of a broadly representative sample of customers on complex topics.

4.1.2 Cognitive Interviews

Before the deliberative events and in-depth interviews, three cognitive interviews were carried out to ensure topics and methods were accessible and understood by customers. These were carried out by Impact moderators and had participants run through a pilot version of the pre-task, sent via email as well as the discussion guide and stimulus slides through Zoom. Participants were asked questions concerning their understanding of the information, whether the text was time-consuming and interesting to read, whether graphs and charts were understood, and understanding of the four key investment areas, the must-do plan and the business plan. This process took up to 30-45 minutes.

Feedback from these groups overall was good, and understanding was relatively high, with the only issue concerning the clarity of the must-do plan/business plan information, however, as this was only one of the participants the information was perceived to be fine as it was for the final groups.

4.1.3 Pre-task

Before attending the focus groups or depth interviews, participants were sent a pre-task pack of information to read. This information would later be covered in the focus group or interview. The pre-task had 3 aims:

1. Provide participants with a preliminary understanding of who SES are and what they do, as well as the purpose of the current price review.
2. Provide participants with an understanding of current water company performance and key performance commitments.
3. To provide an intro to SES's proposed plan for 2025 to 2030, as well as the impact of the plan on bills.

The pre-task was emailed to participants a few days before the group or interview. A full copy of the pre-task materials is available in the Appendix.

4.1.4 Deliberative events

Each deliberative lasted 3 hours and was conducted on the platform Zoom. The groups were moderated by two highly-skilled moderators, part of the Impact team, and independent of SES, to ensure the sessions ran smoothly.

The discussion guide for the session covered the following:

- Introductions
- Reactions and recap on the pre-task
- SES and its role
- Long-term picture to 2050
- Household finances and the cost-of-living crisis
- Overall commitments in the PR24 plan and the 'must do' plan
- Deep dive into each area of the plan

4.1.5 In-depth interviews

The 26 in-depth interviews with digitally disengaged household customers and large NHH organisations were conducted primarily over Zoom, with digitally excluded bill-payer interviews being conducted over the telephone. Shortened and slightly altered versions of the discussion guide lasting 45-60 minutes were used in these interviews, tailored to suit the audience and method of each interview.

4.1.6 Stimulus

A stimulus pack used in the qualitative component was designed to complement the discussion in focus groups and in-depth interviews. This contained information, both written and visual, similar to, but more detailed than, the pre-

task. This was mainly designed to convey the information more visually than if the moderator simply read the same information aloud. Impact was provided with information on the PR24 and ‘must-do’ plans, and created information providing readers with a high-level overview of the key information surrounding SES and the PR24 plan. This information was screenshared to individuals by the moderator in focus groups and in-depth interviews via Zoom and emailed or posted in printed form to participants involved in phone interviews.

Figure 1: An overview of the four key areas of investment from the stimulus pack



4.2 Quantitative method

Following on from the qualitative phase, an online and postal survey was conducted.

4.2.1 Sample

The HH sample was provided by SES and was created using IMD data. To ensure areas of higher deprivation were represented in the sample, it was created using the following proportions:

- 25% from the bottom IMD quintile postcodes
- 22% from the second quintile
- 20% from the third quintile
- 18% from the fourth quintile
- 15% from the fifth quintile

The table below shows the sample breakdown achieved across key demographic groups.

Table 2: Quantitative HH sample

Household sample structure	Incidence ²
Gender	

² Rounded figures may not add up to 100%

Female	52%
Male	46%
I identify in another way	1%
Prefer not to say	2%
Age	
18-24	1%
25-34	10%
35-44	18%
45-54	18%
55-64	24%
65-74	21%
75+	8%
Socio Economic Grade	
ABC1	67%
C2DE	33%
Vulnerability status	
Medical vulnerability	23%
Communications vulnerability	17%
Life stage vulnerability	15%
Any vulnerability	43%

All HH customers contacted by email were given a link to the survey to complete. All customers contacted by post were also sent a link, along with the option of completing the survey via post, if they would prefer. Two customers completed a postal survey, with the remainder all completing the online version.

HH customers were contacted either by email or by post, depending on what information SES held for each customer. This was done to ensure customers from all backgrounds were able to respond to the survey, not just those with internet access.

Initially, there were 3,750 customers contacted via email and 1,250 contacted via post, giving a total of 5,000 customers. Around 200 emails bounced back from the emailed list, so an additional 200 emails were sent. The sample was then expanded to a further 1,600 customers, 1,200 of which were contacted by email and 400 by post. This gives a total of 6,800 that were attempted to be contacted in total.

From the total of 506 HHs who took part in this research, 472 customers came from the emailed sample and 34 from the postal sample. All HH customers contacted by email were given a link to the survey to complete. All HH customers contacted by post were also sent a link, along with the option of completing the survey via post, if they would prefer. Two customers completed a postal survey, with the remainder all completing the online version.

In addition, 67 NHH customers took part in the survey and were initially all contacted via phone. The sample was bought from Dun & Bradstreet. If the customer had the time there and then to complete the survey, they did, however, if they did not, they were either sent an emailed link for the survey, or a call-back was scheduled for a time they could do.

Given a low response rate, with many NHH customers unable to spare the time to complete the survey, SES Business Water also sent the survey to their customer list. From the total of 67 interviews, 59 were done over the phone using a bought-in sample and 8 were done via the link sent out by SES Business Water.

4.2.2 Cognitive Interviews

Before the launch of the survey, a sample of eight HH and two NHH cognitive interviews were carried out to ensure topics and methods were accessible and understood by customers. These were carried out by Impact moderators and had participants undertake a pilot version of the survey. This was followed by a number of questions regarding the clarity of the information, how much information was retained, views on the survey's length and interest in the content. This process took between 30 and 45 minutes.

For the most part, participants liked the survey and found the content interesting, most participants did not have any significant issues with the content. There was some confusion over specifics on bill increases, as well as some information being confusing and overly wordy. This feedback was taken into account for the final launch where explanations were simplified and made clearer, and bill increases were personalised, with % and £ increases being made clear.

4.2.3 Quantitative Survey

HH customers were sent an invitation email/letter explaining the purpose of the survey, and how it would be administered. They were provided with a link to take part or told they could request a postal survey if they would like to take part in that way. HH customers were also told what their current bill is, to allow for tailoring of bill questions to make the questionnaire more relevant to them.

The survey covered similar topic areas to the focus groups and in-depth interviews, looking at the affordability of current bills and expectations of future bills, the importance of investments under each aspect of the proposed plan and the acceptability of the proposed plan.

Detailed Information was also provided to participants to ensure that responses were as informed as possible. This information covered: average future bill predictions, inflation predictions, comparative company data against targets on supply interruptions, water quality, leakage, and per capita consumption, as well as information on the four key aspects of the company business plan. An example of this is given below.

Figure 2: Example of company comparison information shown in quantitative survey

Water Supply Interruptions, without warning, for longer than 3 hours		
If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.		
Companies with the <i>lowest</i> numbers perform best for this service.		
SES Water met its target for this metric last year		
In 2021-2022 SES Water performed 3rd out of 17 companies overall on this measure.		
Water and Sewage Company	Performance against target (%)	
Portsmouth*	-62%	<p>Better performance</p> 
Bristol*	-59%	
SES Water*	-52%	
South Staffs and Cambridge*	-47%	
Affinity*	-39%	
Wessex	-32%	
South West	+11%	 <p>Poorer performance</p>
United Utilities	+30%	
Southern	+53%	
Anglian	+60%	
Yorkshire	+73%	
Thames	+80%	
Northumbrian and Essex & Suffolk	+92%	
Severn Trent	+106%	
Dŵr Cymru Welsh Water	+164%	
Hafren Dyfrdwy	+511%	
South East*	+1083%	
* Water only company		

5 Key findings

5.1 Prior knowledge

During the focus groups and in-depth interviews, knowledge of SES was high. Most participants knew SES supplies clean, drinking water but there was some confusion around waste water, with some people mistakenly thinking SES was also responsible for this. The majority of knowledge came from receiving their bills from SES, although this touchpoint has limited impact, as some participants admitted their water bill was just another Direct Debit and not something they actively looked at regularly.

*“I’ve lived here for about ten months now and I’ve just got my first bill, paid it, and cracked on”
HH Customer*

*“I know water companies are in my life, I just pay the bills.” HH Customer in a vulnerable
circumstance*

*“I wouldn’t say I know much about SES individually. I’d say my broad sweeping comment probably
would be about all water companies doing the same thing” NHH Customer*

HH and NHHs had relatively similar levels of knowledge, even though not all NHHs receive their bills directly from SES. Future customers had the lowest level of knowledge, supporting the idea that knowledge mainly comes from receiving bills, as these customers would not have directly interacted with anything from SES themselves.

5.1.1 Contact

The majority of customers in the qualitative phase, both HH and NHH, were happy with the service they received from SES. When asked to rank their satisfaction on a scale of one to five, the most common answer was four, with some customers giving five, and very few giving under four.

*“I would say a four purely because I think there’s always room for improvement. So, I think, are
not had anything go wrong. But I would say, yeah, four out of five” HH Customer*

*“I’ve lived in a few different places, and I’ve never really noticed. I guess you would only really
notice it when something goes wrong, and how quickly they sort it out. But I’ve been lucky enough
not to have experienced that.” Future HH Customer*

*“It’s a reliable, cheap, high-quality service which I’ve never had to complain about” NHH
customers*

Only a few respondents had experienced service issues, however, those *that had* were generally happy with how SES dealt with these issues.

*“They were quite efficient with me, very friendly. Didn’t really have any complaints, it was
resolved quite quickly. I was on the phone for quite a long time on hold, that was the only
downside but I think that’s with most companies, kind of, do that. But no, once I got to the other
end, it was pretty quick and easy to resolve” HH Customer*

After being shown the company’s performance comparisons, customers were pleased with how SES was performing. This supported the view of SES providing good service to its customers and a good value for money.

5.2 Current state of affairs

In the qualitative sessions, customers were also asked about their current financial status, and whether or not they had been affected by the current cost-of-living crisis. Whilst few HHs and NHHs reported really struggling, many had

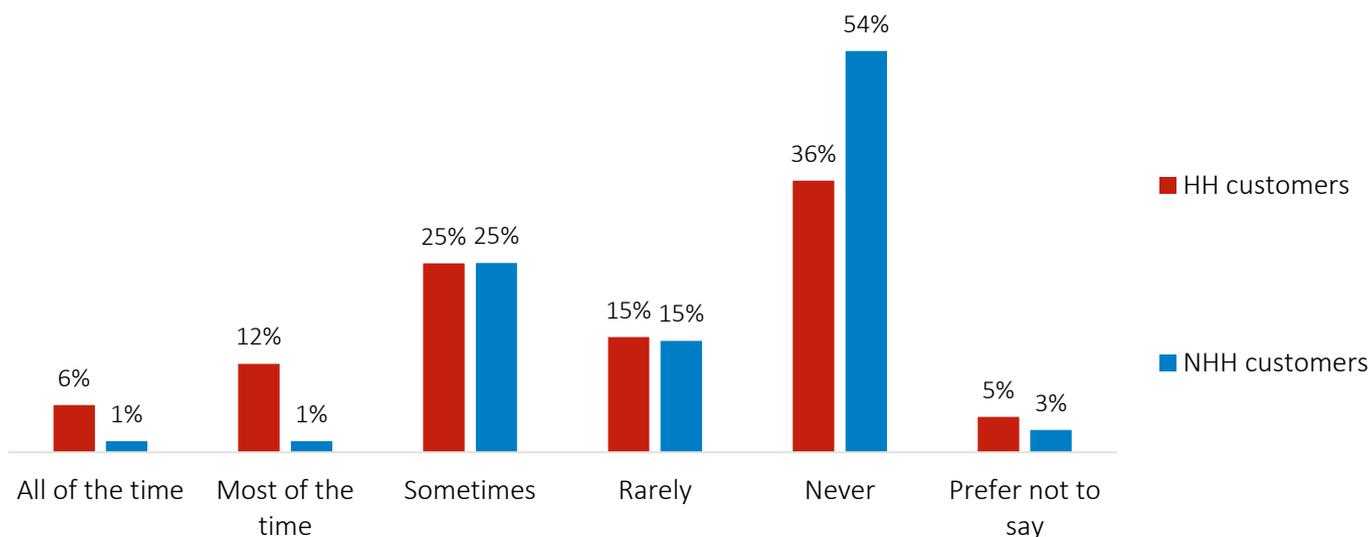
faced some increased financial strain, through increased food and petrol prices and energy bills, in particular. Some customers reported making some changes to their daily household spending as a consequence, and some NHHs said they had been impacted by rising costs across the board.

“I say it’s impacted. I mean, we’ve had to cut down on certain things, I suppose. We have to obviously watch, when we go shopping now, we have to watch obviously, how much the bill is coming to. But yeah obviously, everything is, literally everything has gone up, from my broadband, to the electric.” HH customer

“I’ve definitely had an impact over the last year or so since the hike in energy bills and fuel prices went up and stuff. And with my work predominantly being ovens and hobs extractors everyone’s gone and bought air fryers, so they’re so much easier for people to clean compared to your ovens and stuff like that. So, I have lost work through that although gained it through other sources by expanding my business to end of tenancy cleans, not just carpets but end of tenancy and ovens.” NHH customer

Customers from the quantitative survey were asked how they manage their finances and whether or not they had struggled to pay at least one bill in the last year. Around one-third (34%) of HH and just over one-half of NHH customers (54%) said they never struggle, but 47% of HHs and 28% of NNHs said they struggle sometimes or more. The full breakdown is given below.

Figure 3: The extent to which customers struggle to pay one or more bills



Customers were also asked to consider how well financially they were doing now, and 17% of HHs and 12% of NHHs said they were finding it quite difficult or very difficult. The full breakdown of responses is given below.

Table 3: Current financial situation

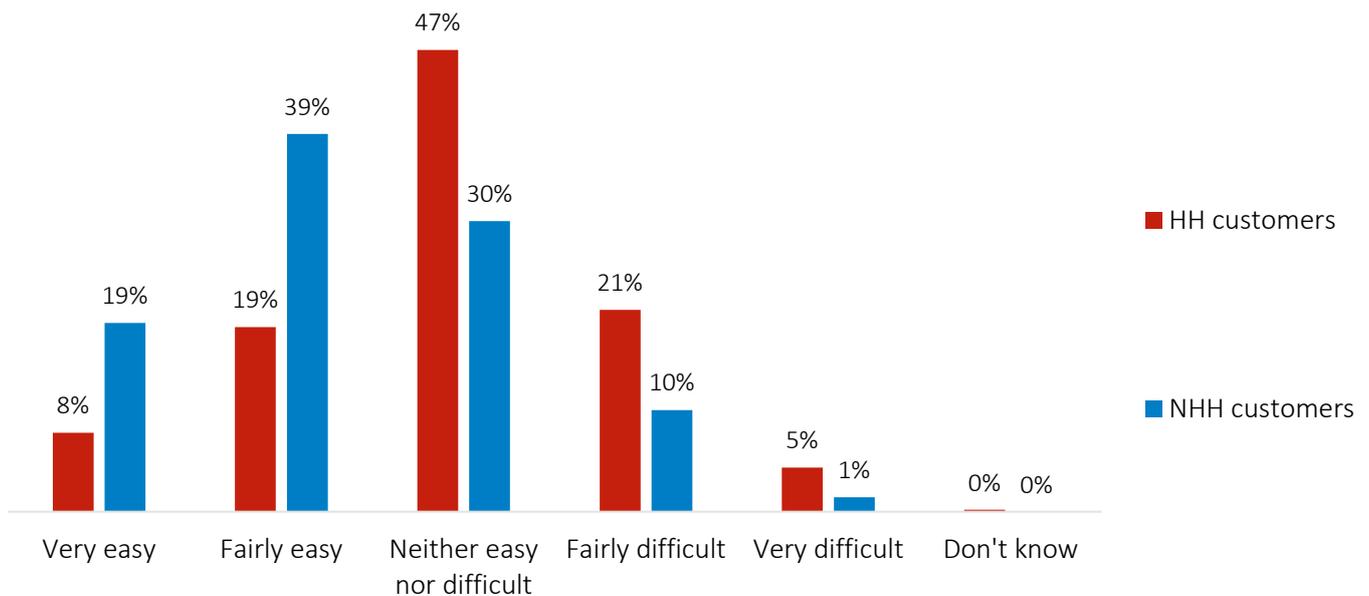
	HH customers	NHH customers
Living comfortably/Doing well ³	10%	12%
Doing alright	31%	39%
Just about getting by	36%	34%

³ HH customers were shown ‘Living comfortably’ and NHH customers were shown ‘Doing well’

Finding it quite difficult	12%	9%
Finding it very difficult	5%	3%
Prefer not to say	5%	3%

In the invitation letter/email, customers were told their current bill amount and then asked in the quantitative survey how easy or difficult they find it to afford. Just over a quarter of HHs and 58% of NHHs found it either very easy or fairly easy to afford, with 25% of HHs and 12% of NHHs finding it difficult. The full breakdown is given below.

Figure 3: Ability to pay current water bill



Of the 17% of HH customers who reported to be struggling financially⁴, only 3% felt their current water bill was either very easy or fairly easy to afford, with 74% saying it was either fairly difficult or very difficult. The proportion of HH customers struggling financially was even higher among those with a medical vulnerability (34%) and among those on an income lower than £26,000 per year (40%).

During the qualitative phase, customers in vulnerable circumstances were also shown a list of support services offered by SES and were asked whether or not they were aware these existed, and if they had made use of any of them.

Not all customers knew that support schemes existed, even among those eligible to receive support in one, or more, ways, but the majority were pleased to know they did. Customers felt SES could do more to promote these services, to ensure those eligible were aware they could apply for support.

"I don't know if I fall into the criteria for support, because I think I my income is under twenty-one thousand pounds a year, but living on my own and having no mortgage, I actually don't struggle with my bills. I wouldn't be claiming anything and it probably is for a family rather than one person living on their own" HH Customer in a vulnerable circumstance

⁴ Determined by either selecting 'finding it quite difficult' or 'finding it very difficult' when asked how they are managing financially now

The schemes relating to financial help were widely supported by customers who felt that a two-year 'audit' period was fair. There were a few questions on the threshold for support (i.e., the qualifying annual income level), but on the whole, it was seen as fair.

Feedback was similar on the non-financial front, with many customers supporting the schemes that were offered. Some customers particularly liked the idea of a joined-up approach across different utility companies (i.e., in the gas and electricity sectors) as this would ensure all customers eligible for support would receive the help they needed, whichever service it was related to.

"Yes, that's a very good idea [The PSR]. I have heard of this scheme, but it hasn't been advertised very much at all. But I have heard of it. I think it's a very good idea." HH Customer in a vulnerable circumstance

"I wish I knew about the LifeLedger, and I don't know whether it's a new game. When I had to do it for a family member, they weren't with SES, but it was an absolute nightmare to try and close an account where I didn't have power of attorney." HH Customer in a vulnerable circumstance

The one area of concern for some customers was the use of third parties to encourage sign-up, due to cynicism that they would be signing up too many customers if incentivised to register as many as possible. These comments were in the minority, however.

5.3 PR24 planning

5.3.1 Must-do plan

Those who attended the qualitative groups largely found the must-do plan acceptable and affordable. There were some questions as to why customers should have to pay for mandatory investments arising from increased government regulation, but on the whole, participants were happy with the levels of investments proposed.

"Personally, I don't think mandatory things that are set by government should be paid by anybody but the company. Why are they making us pay for something they've been told they should do?" HH customer

Across both plans, there was also some desire for increased transparency and for further detail to be shared about the full intentions of the plan, along with specific actions leading to outcomes. Some HH customers noted that it might be more appropriate to quote figures in percentages, rather than pounds if there are likely to be differences in how much additional investment each customer is expected to pay.

The feedback on each element of the plan is given below.

5.3.1.1 Provide you with high-quality water from sustainable sources

Customers were largely very positive about the investment suggestion in the must-do plan. All types of HH customers, including those in vulnerable circumstances, were supportive of investment to meet higher quality water standards and for whatever is needed to meet WINEP laws. They approved of working with farmers and mitigating the impact on the natural environment, where possible.

Customers stressed that the importance of high-quality water was very high for health and well-being and they supported investment to make sure this was delivered.

"They're all must-dos and you've got to be a right scrooge to say I want my one pound twenty-six and the kids can take a risk." HH Customer

"I mean working with the farmers and things can only be a positive thing, or you'd like to think so, especially for the farmers as they want their supplies to be the best quality as they can as well." NHH customer

The only negative mentioned regarding must-do plan investments was whether or not it is necessary to pay for the use of UV treatment to clean the water. NHHs especially asked why this was the case. Overall, however, customers were happy to pay for the extra investments if it was needed.

“Why do they want to install UV, is there a logical reason for it? There must be I should think but I’d hate to think the regulator was insisting on something without any logic in it.” NHH Customer

5.3.1.2 Deliver a resilient water supply from source to tap

When customers in the qualitative phase of the research were asked about SES delivering a resilient water supply from source to tap, leakage dominated a lot of the discussion. Customers were supportive of the ambition to reduce leakage by finding and fixing more leaks. Many felt the investment above that referenced in the must-do plan was necessary and some even said reducing leakage should be the number one priority for SES during PR24.

“It has such a knock-on effect with everything doesn’t it, it’s a waste of water, the environment, it causes traffic issues, so, it’s just a huge issue. So, yeah, to replace those, and spend the money on leakage and fixing more leaks, is vital.” HH customer

“I think the issue regarding the leakage is relevant for me, because as you can see from what was posted, it’s seventy per cent on SES Water’s side and thirty per cent from the customer’s side, so I think it should be attended to. If we could manage water to a more reasonable degree, I think it will increase sustainability.” NHH Customer

Some NHHs also made the point that it was often treated water that is being leaked from the pipes, so this much leakage acts as a double blow, as they would already have paid for the water to be treated before it was lost.

“My other thought with the whole leakage thing was there’s probably absolutely not a lot of point in dealing with things like pesticides and all of that in the water and then having this really beautiful, clean healthy water and then just having it leak everywhere.” NHH Customer

The other area of the must-do plan covered under delivering a resilient supply was protecting water treatment works through additional work to meet new security regulations. Again, customers were largely supportive of investment in this area, highlighting the importance of security in ensuring a continued water supply.

“I think the security is absolutely vital to protect the supply at all costs, because if anything got into the water supply, as I said, there are some nutters around, you’ve got to do something about that.” HH customer

5.3.1.3 Help you reduce your water footprint and charge a fair price

The third area of the business plan shown to customers was helping them reduce their water footprint and charge a fair price. This was the area customers were least positive about, as many were uncertain about the benefits of the smart meter roll-out. Customers questioned how much of an impact this would have on reducing water consumption and made the point that water was such an essential product, already often only used when necessary, so providing customers with more knowledge on individual consumption would be unlikely to affect usage.

“How does a smart meter reduce water usage compared with a normal meter?” NHH customer

Some customers in vulnerable circumstances were especially negative about water meters, given they often have an increased dependency on water due to a medical condition, and others felt that tracking water usage that closely was ‘big brother-like’.

“I’m dead against water meters. The same with electric meters. We do use a lot of water. Being disabled, my wife is disabled as well, we have a lot of baths and showers.” HH Customer in a vulnerable circumstance

In addition to the above, using less water was seen to be a wider issue that relates more to societal behaviour change, rather than something that could be fixed with a simple solution, such as smart meters. Customers also felt a clear communication strategy would be key to the success of the roll-out, as they wanted to be informed of the benefits before having smart meters installed in their homes.

“I think the marketing campaign and the way that these businesses, SES and the retailers etc., wholesalers and retailers communicate this to our businesses and the public is key.” NHH Customer

Despite these issues and questions, some customers nonetheless were supportive of smart meters, providing the roll-out was ‘fair’ and the messaging was right. Some did admit to having reduced their energy usage after having a smart meter installed but did still question how much impact people could have individually. Some made the point that their bills could reduce overall if their water consumption were to reduce once smart meters were installed; the argument being that there could be a longer-term saving that offset the cost of the installation.

“I think because it’s the highest one we’ve seen in terms of the increases, but I think it’s bound to be more it is investing in smart meters, getting them installed, so I think that will be a higher cost. But as I say, it will pay off because you will have more than an idea about what you are using and if it’s detecting the leaks, that will also save water. So, I think, you know, it is important” HH Customer

“I think it would benefit people. I mean, obviously seeing, although obviously, the price itself does look a little bit high, but if we do get the smart meters, and we do reduce our litres per day, that means our bill will be less, our water bill will be less, so, it will kind of level it out. So, the cost, five pounds fifty-one might not even be as high as it looks because we’ve reduced our water per day anyway. So, it might just level it out, you know, and hopefully, it won’t be as high as it’s showing.” HH Customer

5.3.1.4 Improve the environment and have a positive impact on our local area

For improving the environment and having a positive impact on our local area, the only options given were from the preferred plan, so no feedback was given on the must-do plan.

5.3.2 Preferred plan

During the qualitative phase, respondents generally admired the environmental goals included within the preferred plan and found the associated cost to be acceptable. Measures aimed at protecting the environment, enhancing biodiversity, as well as reducing leakage, were seen as some of the most important benefits of the plan. Some participants were of the view that these goals should be mandatory in the first place.

There was, however, some degree of scepticism from customers as to whether or not the aims of the preferred plan were achievable, highlighting the need for transparency and more information on how it would be done.

“They’re very laudable aims, but will they actually happen?” HH customer

Customers in the quantitative survey were shown an overview of the plan and asked how easy they thought it would be to afford. The number that thought it would be either very easy or fairly easy to afford reduced from 27% for their current bill to 13% among HH customers and from 58% to 36% among NHH customers. The full breakdown of responses is given below.

Table 4: Ability to pay water bills

	HH customers		NHH customers	
	Current bill	Projected future bill	Current bill	Projected future bill
Very easy	8%	2%	19%	3%

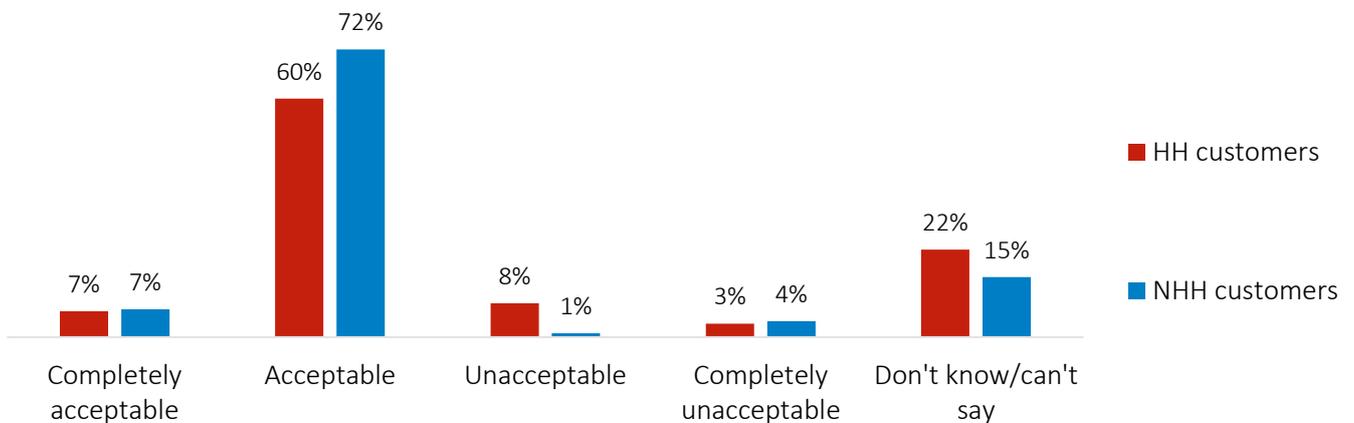
Fairly easy	19%	11%	39%	33%
NET: EASY COMBINED	27%	13%	58%	36%
Neither easy nor difficult	47%	35%	30%	34%
Fairly difficult	21%	35%	10%	16%
Very difficult	5%	13%	1%	6%
NET: DIFFICULT COMBINED	25%	48%	12%	22%
Don't know	0%	4%	0%	7%

Among HH customers who are struggling financially, only 1% thought the proposed bill would be easy to afford, versus 3% for their current bill. Conversely, 85% thought the proposed bill would be difficult to afford, versus 74% for their current bill.

In addition, 63% of those with an annual income of less than £26,000 thought their projected future bill would be difficult to afford (versus 40% for their current bill), and 57% of those with a medical condition thought their projected future bill would be difficult to afford (versus 34% for their current bill).

Looking more into the proposed plan itself, levels of acceptability were high, with 66% of HHs and 79% of NHHs finding the proposed plan either 'acceptable' or 'completely acceptable'. If those scoring 'don't know' are removed from the scale, then the numbers increase to 85% among HHs and 93%. The full breakdown of the scale is given below.

Figure 4: Acceptability of proposed business plan



Acceptability (completely acceptable/acceptable) reduced to 55% among HHs who are struggling financially and 59% among those with a medical vulnerability.

The key reasons given by HHs for why the proposed plan was unacceptable, were thinking companies should pay for service improvements (37% selected this as one of their top two reasons) and thinking company profits are too high (28%). The same proportion (28%) also cited that the proposed bill increases were too expensive and 23% said they wouldn't be able to afford this. The full breakdown of HH responses is given below.

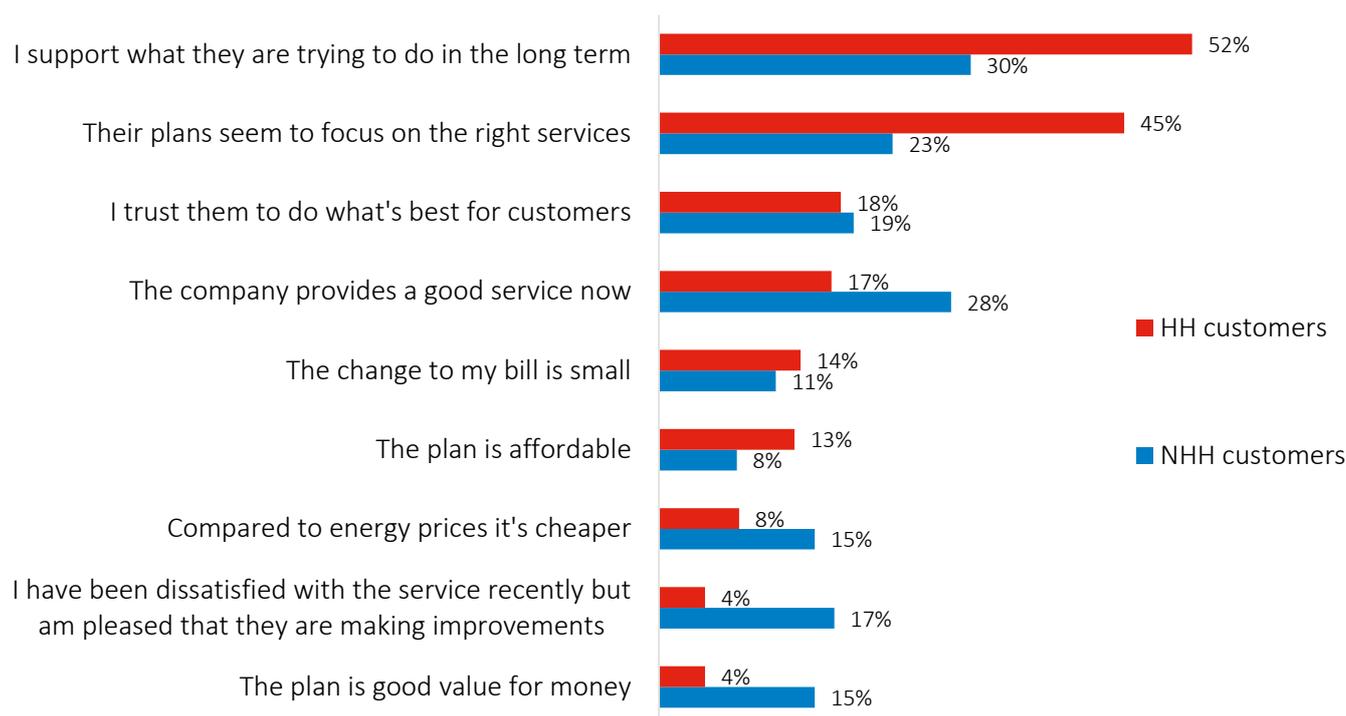
Figure 5: Reasons for finding the proposed plan unacceptable



There were only four NHHs that felt their proposed bills would be unacceptable, but two of those selected expecting better service improvements as one of their reasons.

When asked for the main reasons why the proposed plan was acceptable, over half of HHs (52%) said they support what SES is trying to do in the long term; 30% of NHHs also selected this as a reason. The next most common reason given (by 45% of HHs and 23% of NHHs) was that the plan seemed to focus on the right services. A further 28% of NHHs and 17% of HHs said they thought SES provided a good service now. The full breakdown of HH and NHH responses is given below.

Figure 6: Reasons for finding the proposed plan acceptable



5.3.2.1 Provide you with high-quality water from sustainable sources

During the qualitative groups, participants were shown additional elements of the plan that SES would like to deliver on top of the must-do plan. For providing high-quality water, customers were asked whether or not they support the extra investment to improve water quality by reducing the risk of lead in water supplies. The overwhelming sentiment from customers on this subject was surprise this wasn't done more already, with many asking why this was not a mandatory investment. Overall, customers were very supportive of extra investment to replace as many lead pipes as possible that still supply schools and nurseries, and were happy to pay the extra amount on their bills. This feeling was particularly strong among NHHs, with many questioning why lead pipes were still being used.

"To be honest, if you'd asked me, 'are there schools and nurseries that have still got lead pipes supplying their water?', I'd have probably assumed not. So, to see that there is a lot to do is a bit of a surprise. But yes, absolutely. [that's something they should be doing]." Future HH Customer

"I think anything that's going to reduce young people ingesting lead from water consumption is going to be quite important." NHH Customer

"I'm just staggered that there are still schools within the SES area, wherever it covers, still have that." HH customer

Customers in the quantitative survey were shown the individual elements of the preferred plan and asked which they felt was the most important. Just under half of both HH and NHH customers felt stopping nitrates and pesticides entering our water sources and protecting living species in water sources, was the most important. The breakdown across different elements is given below.

Table 5: Importance of 'Provision of high-quality water from sustainable sources' elements of preferred plan

Topic	Statement	Most important (HH)	Most important (NHH)
Provision of high-quality water from sustainable sources	Installation of UV treatment to protect water quality from contamination. +£1.73 (HH)/+0.87% (NHH) ⁵	24%	31%
	Stopping nitrates and pesticides entering our water sources and protecting living species in water sources. +£0.93/+0.47%	49%	42%
	Replacing lead pipes within schools and nurseries by 2030. +£0.97/+0.49%	15%	19%
	Don't know/can't say	13%	7%

5.3.2.2 Deliver a resilient water supply from source to tap

In addition to the individual elements covered in the must-do plan, customers in the qualitative phase were asked whether or not they supported the extra investment to further increase the resilience of the water supply. When asked about protecting sites from climate change and power cuts, customers were, again, supportive of extra investment. Many customers, particularly NHHs, felt this was a necessity and questioned why standby generators, that switch on automatically, weren't in place already.

*"I would have thought the power outages as in standby generators should have been years ago."
NHH customer*

Customers also liked that the river Mole would be protected further, and felt it showed proactivity from SES, to be ahead of a potential issue before it becomes a wider problem.

"You can't whinge when it happens, and you can't get drinking water because the river Mole has flooded into the works. You've got to do it beforehand" NHH Customer

"They've identified locally the river Mole, so that's where they feel that the money needs to go, more than in line with what they're being told to do by the government, so it seems sensible." HH Customer

Further work to reduce leakage was also included in the preferred plan, and customers were very much in favour of this, to ultimately reduce leakage as much as possible.

The only question raised here was from some HH customers, particularly those in vulnerable circumstances, concerned whether or not investment above any legal requirements was necessary. However, most were happy to pay the additional amount.

During the quantitative survey, customers were again shown the individual elements of the preferred plan and asked which they felt was the most important. Just under half of HH (47%) and 60% of NHH customers chose investing in

⁵ £ figures were shown for HHs and % were shown for NHHs

reducing leakage by finding and fixing more leaks, managing pressure and finding leaks on customers' pipes. This was consistent with the feedback from the qualitative groups. The breakdown across different elements is given below.

Table 6: Importance of 'Delivering a resilient water supply from source to tap' elements of preferred plan

Topic	Statement	Most important (HH)	Most important (NHH)
Delivering a resilient water supply from source to tap	Working to make our water treatment works to be more secure and enhance the water quality. <i>+£2.73/+1.37%</i>	29%	19%
	Investing in reducing leakage by finding and fixing more leaks, managing pressure and finding leaks on customers' pipes. <i>+£3.73/+1.88%</i>	47%	60%
	Schemes aimed at protecting sites from flooding and power outages. <i>+£1.78/+0.79%</i>	9%	16%
	Don't know/can't say	15%	4%

5.3.2.3 Help you reduce your water footprint and charge a fair price

In the qualitative phase, customers were shown the option of rolling out smart meters at a faster rate than what was outlined in the must-do plan. The feedback on smart meters overall did not change. However, those positive about the technology were supportive of the additional investment that would be needed to increase the speed of the rollout.

Customers questioned how the roll-out would be managed though and how SES would decide who would get smart meters first. On an assumption that meters would reduce leakage, and therefore help customers reduce their bills, they wanted to see the rollout to as many customers, as quickly as possible.

"So, I think we would all be a lot more conscious of how much water we are using. So, while it's initially a big investment, I think it would be a positive investment." HH customer

The other element of the preferred plan shown in the qualitative phase was the provision of a social tariff and additional support for customers facing financial difficulties. Customers were largely in favour of this and inclined to pay a small additional amount on their bill if it made water more affordable to those who were struggling financially.

"Eighty-six pence is probably the amount of change that I lost in the bottom of my bag. I would not notice that. And it would make such a big collective difference for so many people." Future HH Customer

Customers in the quantitative survey were also shown the two elements of the preferred plan and asked which they felt was most important. Nearly two-thirds of HHs felt extra water efficiency support would be most important and just over half of NHHs agreed. The full breakdown of the two options is given below.

Table 7: Importance of ‘Helping you reduce your water footprint and charge a fair price’ elements of preferred plan

Topic	Statement	Most important (HH)	Most important (NHH)
Helping you reduce your water footprint and charge a fair price	Providing smart meters to 192,000 homes and businesses with a customer-friendly way of monitoring their water use. +£7.94/+3.99%	20%	39%
	Extra water efficiency support for customers. +£0.69/+0.35%	62%	52%
	Don't know/can't say	18%	9%

5.3.2.4 Improve the environment and have a positive impact on our local area

During the qualitative phase of the research, customers were shown two investment options SES would like to make to improve the environment and make a positive impact on the local area. Given both investment values were small, customers were happy with the additional charge on their bills to allow SES to get on and do the work as described.

“That’s the big thing now, the environment, I think bring it on ...if that’s what they need to do, they’ve got to meet these targets. If that’s what they’ve got to do, that’s what they’ve got to do. We want a better world, don’t we? So yeah, I think we’d just have to take it, accept it.” HH Customer in a vulnerable circumstance

“It’s very minimal, isn’t it, compared to all the other stuff, but it still adds something to the bill. But it’s such a minimal amount for improving the environment and biodiversity that I think it’s worth it.” NHH Customer

Customers were largely surprised at how small the investment levels required would need to be, especially when compared to other areas of the plan. Some questioned whether SES could go even further, not just identifying nature-based solutions, but going ahead and implementing them.

“I think it should be done tomorrow. I think holding back on it is just a recipe for long-term disaster.” HH customer

Both HH and NHH customers in the quantitative survey showed a preference for working to enhance biodiversity, but a large number of NHHs also wanted SES to enhance the environment, increasing resilience and biodiversity. The breakdown of responses is given below.

Table 8: Importance of ‘Improving the environment and having a positive impact on the local area’ elements of the preferred plan

Topic	Statement	Most important (HH)	Most important (NHH)
Improving the environment and having a positive impact on the local area	Enhancing the environment, increasing resilience and biodiversity on the river Eden. +£0.11/+0.04%	29%	42%
	Work to enhance biodiversity on 70% of the land SES owns through improving land management. +£0.12/+0.06%	46%	48%

	Don't know/can't say	26%	10%
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5.3.3 Phasing the cost of investments

When asked their preference for how bills should increase over time, 40% of HHs felt an increase in bills starting sooner rather than later, would be preferable, so that increases could be spread over time. However, 47% said they didn't know enough to give an answer. The remaining (13%) felt an increase starting later, putting more of the increases onto younger and future bill-payers, would be preferable.

HHs struggling financially were less likely to support bill increases sooner (only 22% felt that was their preferred option) but 62% of this group did not know enough to give an answer. The percentage of those preferring delayed increases was 16%.

Many more NHHs felt the increase should be starting later, with 30% selecting this option. However, opinions were fairly polarised as 46% felt they should start sooner. Only 24% of NHHs selected that they didn't know enough to give an answer.

6 Conclusions

Both HH and NHH customers in the qualitative groups were accepting of the must-do and preferred plans. The element of the must-do plan most liked by customers related to delivering a resilient supply and particularly, reducing leakage where possible. They were also very supportive of increased investment to meet WINEP laws and working with farmers to mitigate the impact on the natural environment. There was less support for the roll-out of smart meters, but overall, customers were on board with the idea, as long as the roll-out was fair and the messaging around why they were necessary was considered.

Customers in the qualitative and quantitative phases were also largely supportive of the preferred plan, with many customers in the focus groups suggesting some of the investment ideas were as important as those in the must-do plan. This sentiment was strongest when related to leakage. Customers were also very supportive of the investment options relating to reducing the impact on the natural environment. In addition, 67% of HHs and 79% of NHHs in the quantitative survey found the proposed business plan to be acceptable. Acceptability was reduced among HH customers who are struggling financially and those with a medical vulnerability, but still over half of those within these groups found it acceptable.

Among customers who felt the proposed plan was unacceptable, most customers cited the reason that companies should pay for these improvements themselves and that the profits were too high. Some customers also felt the bill increases were too high. Meanwhile, those who felt it acceptable, thought the plan focused on the right areas and they supported what SES Water was trying to do over the long term. The key messaging here should, therefore, be to ensure customers are aware of where bill money is being spent, and be as transparent as possible when it comes to the actions SES Water are taking. If there is work done in these areas, then it is likely that acceptability will improve. It might also be advised that providing customers with percentage figures on where bill increases are likely, as well as a number in pounds and pence, might help customers understand the differences a bit more, and therefore perhaps be more accepting. On the affordability front, given the number of customers in vulnerable circumstances who were not aware of the support schemes on offer, there is a clear need to communicate this more. If customers who are struggling, are given the financial support they need, there is likely to be an increase in affordability.

Customers in the quantitative survey felt that investment should be phased evenly over time, starting sooner rather than later. This was the preferred option for both HHs and NHHs. Nearly half of all households, however, felt they did not know enough to answer and 24% of HH said the same thing.

Overall, our recommendation based on the findings of this research is to proceed with the preferred business plan, making the additional investments above the must-do plan.

7 Appendix

7.1 Qualitative materials

7.1.1 Screener questionnaire

INTRODUCTION

Good morning/afternoon/evening. My name is from, on behalf of Impact, an independent market research company. We are conducting research on behalf of **SES Water**, to explore customer views on their business plans.

It is important to SES Water that your views form part of their long-term plans moving forward, to help make sure future charges are fair and affordable given the investments planned. So, we would like to invite you to take part in a **3-hour online deliberative event, or 45 minute depth interview** to explore water charges in detail.

This will also involve completing a short **10-minute task** before the deliberative event.

We are looking for specific types of people to take part in the research to make sure we can gain a wide range of views. If you meet the qualifying criteria, would you be happy to take part in the research?

Yes / No

OE ASK IF NO TO TAKING PART

We are sorry to hear that you are not interested in taking part in this research. Before you go, we are interested in finding out whether there is a specific reason for this? **CLOSE**

This is a genuine market research study and no sales call will result from your participation. The research will be carried out in strict accordance with the Market Research Society's Code of Conduct and GDPR.

If you require any further information about how we securely store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

If you have any queries, you can contact Impact Research Ltd on 01932 226 793 and ask for a member of the Utilities team. **PROVIDE OFFICE ADDRESS/EMAIL ADDRESS IF REQUESTED.** You also have the right to withdraw your consent at any time and may do so using the same number.

If you wish, you may also confirm our credentials by contacting the Market Research Society on 0800 975 9596.

In addition, for added security, you can find information on this customer research programme here: <https://www.south-staffs-water.co.uk/about-us/our-strategies-and-plans/business-plan-2020-2025/customer-feedback/customer-feedback-what-to-expect>

Group	Customer type	Date and time
1	Households 24 x bill payers (recruit 26 for 24 to show) 8 x future bill payers (recruit 10 for 8 to show)	Wednesday 17 th May @ 6-9pm
2	Non-households	Tuesday 16 th May @ 6-9pm

	10 x micro-organisations (less than 10 employees)	
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Matrix for recruitment – non-household.

Group or Depth	Number needed	Company size	Industry (NHH6)	Town location (NHH7)	Urban/rural location (NHH8)	Water usage (NHH3)
Group	10	NHH2 = 1 to 3 (mix across all)	Mix across all industries	Mix across locations	Mix of urban (NHH8= 1 or 2) and rural (NHH8= 3 or 4)	Mix across small, medium and large
Online/telephone depths	8	NHH2 = 4 to 9 (mix across all)	Mix across all industries	Mix across locations	Mix of urban (NHH8= 1 or 2) and rural (NHH8= 3 or 4)	Mix across small, medium and large

Matrix for recruitment – Household

Group or Depth	Number needed	Vulnerability type	Age (HH5)	Gender (HH4)	SEG (HH8)	Town location (HH6)	Urban/rural location (HH13)	Housing tenure (HH10)	Meter (HH16)
Group	24	Minimum 8 either vulnerable (QHIDVULNERA VLE) or financially vulnerable	Minimum 6 aged 18-34, 6 aged 35-65 and 6 aged 65+	Minimum 10 male and 10 female	Minimum 10 ABC1 and 10 C2DE	Mix across locations	Minimum 10 urban (HHH13=1 or 2) and 10 rural (HH13=3 or 4)	Minimum 6 home owners (HH10 = 1 or 2) and 6 renters (HH10=4)	Minimum 12 metered
Telephone depths	6	Digitally disengaged (HH7 = 1 to 5)	Minimum 1 aged 18-34, 1 aged 35-65 and 1 aged 65+	Minimum 2 male and 2 female	Minimum 2 ABC1 and 2 C2DE	Mix across locations	Minimum 2 urban (HHH13=1 or 2) and 2 rural (HH13=3 or 4)	Minimum 1 home owners (HH10 = 1 or 2) and 1 renter (HH10=4)	Minimum 3 metered
Online/telephone depths	16	8 vulnerable (QHIDVULNERA VLE) and 8 financially vulnerable	Minimum 4 aged 18-34, 4 aged 35-65 and 4 aged 65+	Minimum 6 male and 6 female	Minimum 6 ABC1 and 6 C2DE	Mix across locations	Minimum 6 urban (HHH13=1 or 2) and 6 rural (HH13=3 or 4)	Minimum 4 home owners (HH10 = 4 or 2) and 1 renter (HH10=4)	Minimum 3 metered

RECRUITER INCENTIVE INFO:

Household groups:

In return for taking part in this research, you will receive an incentive of £100. To qualify you need to have attended the group and completed the pre-task.

Household depths:

In return for taking part in this research, you will receive an incentive of £50. To qualify you need to have attended the group and completed the pre-task.

Non-Household groups:

In return for taking part in this research, you will receive an incentive of £150. To qualify you need to have attended the group and completed the pre-task.

Non-Household depths:

In return for taking part in this research, you will receive an incentive of £70. To qualify you need to have attended the group and completed the pre-task.

EXCLUSIONS SECTION

M ASK ALL

S1 Do you, or anybody in your household, work in any of the following industries?

- 1. Advertising **CLOSE**
- 2. Journalism **CLOSE**
- 3. Utilities **CLOSE**
- 4. Marketing **CLOSE**
- 5. None of the Above

S ASK ALL

S2 Have you taken part in a market research group or depth interview in the past?

PLEASE SELECT ONE OPTION FROM THE LIST BELOW.

Yes, within the last 6 months	1 CLOSE
Yes, over 6 months ago	2 ASK S3
No, I have never taken part in research	3 GO TO S5

S ASK IF S2 = 1 OR 2

S3 Can you tell me how many discussions you have taken part in during the last 3 years?

PLEASE SELECT ONE OPTION FROM THE LIST BELOW.

1 – 3	1 ASK S4
More than 4	2 CLOSE

S ASK IF S3 = 1

S4 Have you taken part in research for SES Water at any point over the last 5 years?

PLEASE SELECT ONE OPTION FROM THE LIST BELOW.

Yes	1 CLOSE
No	3 GO TO S5

S ASK ALL

S5 Are you currently in paid employment?

- 1. Yes
- 2. No **SKIP TO HH1**

NHH SCREENING SECTION

S ASK IF S5=1

S6 With regards to dealing with the bills for your organisation e.g., business rates, gas, electricity, water and sewerage, and managing the day-to-day running of the water services, which of the following best describes your role?

1. Solely responsible **CONTINUE WITH NHH SCREENING**
2. Jointly responsible **CONTINUE WITH NHH SCREENING**
3. Have no responsibility **SKIP TO HH1 SCREENING**
4. Bill paid by Landlord **SKIP TO HH1 SCREENING**

S7 Does your organisation operate from an office premises/shop/Industrial unit, or from home?

1. From an office premises/shop/Industrial unit **CONTINUE**
2. From home or other domestic premises **SKIP TO HH1 SCREENING**

S8 Which of the following does your organisation's property have?

1. Mains Water **CONTINUE**
2. Mains Sewerage
3. Private Water supply **CLOSE, DO NOT RECRUIT**
4. Septic Tank **CLOSE, DO NOT RECRUIT**
5. Don't know **CLOSE, DO NOT RECRUIT**

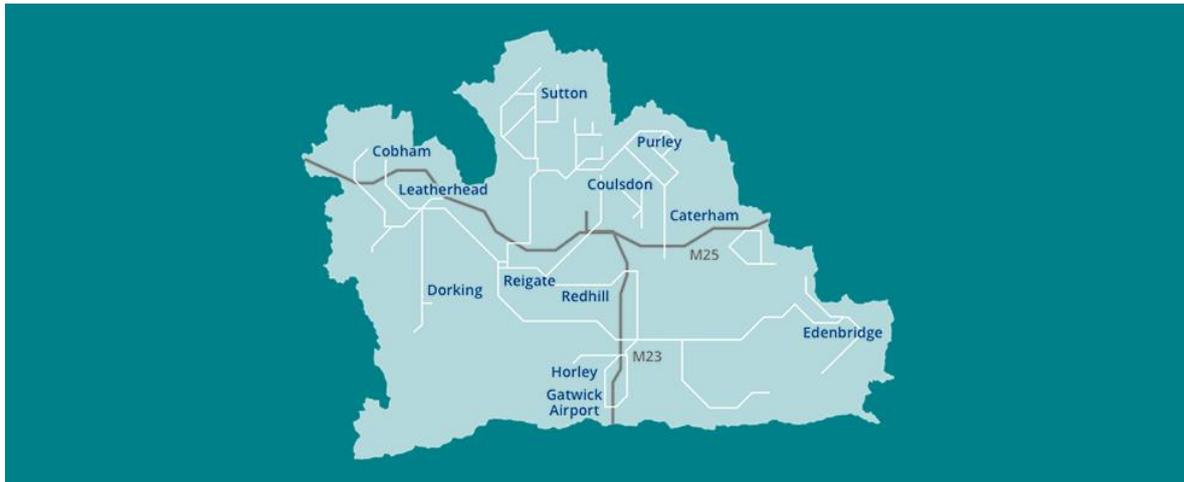
MUST CODE 1 TO CONTINUE

S ASK IF NHH

NHH0 Which company currently supplies drinking water to your business?

Please note, whilst organisations in England are NOT able to choose which supplier provides the water to their organisation, or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries. Therefore, the company you send your bill to, may not be the company that supplies your water.

The map below shows the operating area for Sutton & East Surrey (SES) Water. Please note, if you are a SES Water customer, they are only responsible for providing your clean water, your wastewater will be dealt with by either Thames Water or Southern Water.



CLOSE IF 1. SES WATER ISN'T SELECTED

1. SES Water
2. Thames Water
3. Southern Water
4. South East Water
5. Affinity Water
6. Other
7. Don't know

OE ASK IF NHH

NHH1 What is your job title?

S ASK IF NHH

NHH2 How many full-time permanent employees does your organisation have?

1. Sole trader
2. 2 to 5
3. 6 to 10
4. 2 to 10
5. 11 to 20
6. 21 to 50
7. 51 to 99
8. 100 to 250
9. More than 250

1. S ASK IF NHH

NHH3 Thinking about water consumption, which of the following best describes your organisation?

1. **Low water consumption** - For example, similar to a large household, hairdresser
2. **Medium water consumption** - For example, an office, a car wash, a large business where water is not a key component of the product/service, or a small farmer
3. **High water consumption** – For example, large manufacturing business, a large chemical company, large (arable) farmer. Water is part of our product and/or production process
4. **Don't know** **SKIP TO HH1**

2. S ASK IF NHH

NHH4 In the last 2 years, have you experienced any issues with your organisation’s water supply such as an interruption to the supply, a leak or discoloured water?

- 1. Yes, water supply issues
- 2. Yes, customer service/ billing issues
- 3. No issues/ sewerage issues
- 4. Don’t know

3. S ASK IF NHH

NHH5 How much is your organisation’s annual bill from your clean water supplier (I.e., Water coming through taps)? If you do not know exactly, please try and give your best estimate.

- 1. SMALL (Bill <£1,000 pa)
- 2. MEDIUM (Bill £1,000-£19,999 pa)
- 3. LARGE (Bill £20,000+ pa)
- 4. Don’t know

4. S ASK IF NHH

NHH6 What industry does your organisation operate in?

1.	Financial Services
2.	IT / Communication services
3.	Media / Publishing
4.	Business Services
5.	Other Services (e.g., Hairdresser/beauty)
6.	Tourism – e.g., hotels, guest houses, campsites
7.	Catering – e.g., restaurants, cafes, pubs
8.	Transport / Distribution
9.	Construction and Property Development (including Plumbing/ Heating/ Electrical)
10.	Manufacturing & Engineering
11.	Government/ Public Sector
12.	Entertainment / Culture / Sport
13.	Wholesale
14.	Retail
15.	Healthcare and Social work – public sector
16.	Healthcare and Social work – private sector
17.	Agriculture / Forestry / Fishing
18.	Energy / Utilities
19.	Education
20.	Other (Please Specify)
21.	I’d rather not say
22.	Don't know

5. S ASK IF NHH

NHH7 Which area is your business office located in? Please note, if you are not located in any of these towns/areas, please select the one closest to you.

- 1. Sutton
- 2. Purley
- 3. Cobham

4. Leatherhead
5. Dorking
6. Reigate & Banstead
7. Redhill
8. Horley/Gatwick
9. Caterham
10. Coulsdon
11. Edenbridge
12. Sevenoaks
13. Epsom
14. Elmbridge
15. Oxted
16. None of the above

S ASK ALL

6. **NHH8** Which of the following best describes the area where your organisation is based?
- 7.
1. City location
 2. Other urban location
 3. Semi-rural
 4. Rural
 5. Don't know

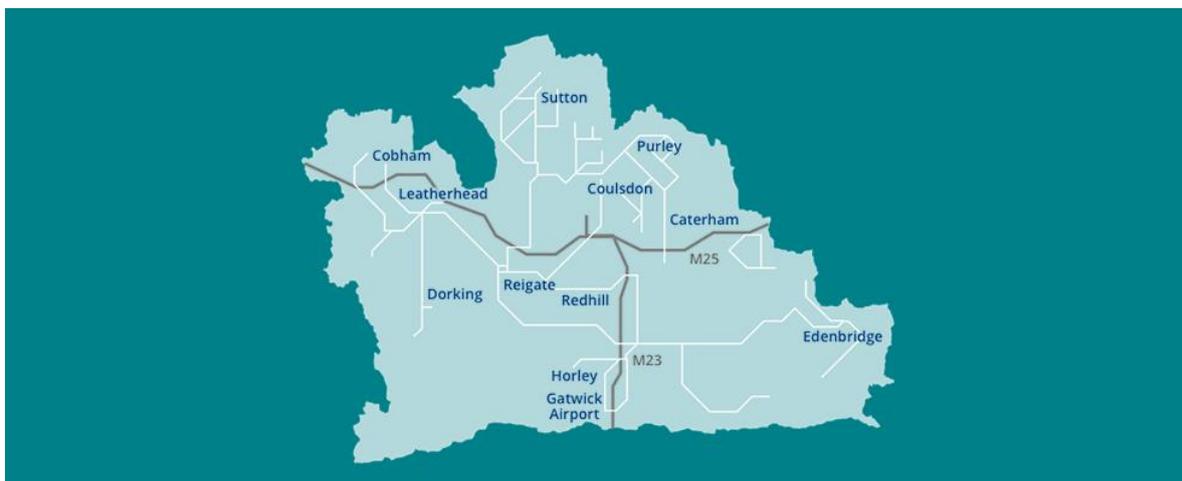
RECRUIT INTO APPROPRIATE GROUP OR INTERVIEW AND SKIP TO END – RECRUITER CHECK AND CLOSING INFORMATION

HH SCREENING SECTION

S ASK IF NHH

HH0 Which company currently supplies drinking water to your home?

The map below shows the operating area for Sutton & East Surrey (SES) Water. Please note, if you are a SES Water customer, they are only responsible for providing your clean water, your wastewater will be dealt with by either Thames Water or Southern Water.



CLOSE IF 1. SES WATER ISN'T SELECTED

1. SES Water
2. Thames Water
3. Southern Water
4. South East Water
5. Affinity Water
6. Other
7. Don't know

S ASK IF HH

HH1 Which of the following services does your property where you live have?

1. Mains Water supply **CONTINUE**
2. Mains Sewerage
3. Private Water supply **CLOSE, DO NOT RECRUIT**
4. Septic Tank **CLOSE, DO NOT RECRUIT**
5. Don't know **CLOSE, DO NOT RECRUIT**

MUST CODE 1 TO CONTINUE

S ASK IF HH

HH2A In terms of dealing with the water bills in your household, can you tell me which of the following best describes your role? (Note: 'dealing with' means paying bills and sorting out any problems or queries that might arise with your water services)

1. Solely responsible
2. Jointly responsible
3. Have no responsibility **go to HH2B**

S ASK IF HH2A = 3

HH2B Do you plan on becoming responsible for dealing with household water bills in the next 2-3 years? E.g. might be moving out and will become solely or jointly responsibility for your households' water bill.

1. Yes
2. No **THANK AND CLOSE**
3. Not sure **THANK AND CLOSE**

QHIDCURRENTBILLPAYER: HH2A=1 or 2,
QHIDFUTUREBILLPAYER: HH2B=1

S ASK IF HH

HH4 What is your gender?

1. Male
2. Female
3. Other (please specify)
4. Prefer not to say

8.

S ASK IF HH

9. **HH5** What is your age?

10.

1. Under 18 years old **CLOSE**
2. 18-24 years old
3. 25-34 years old
4. 35-44 years old
5. 45-54 years old
6. 55-64 years old
7. 65-74 years old
8. 75 years old or over
9. Prefer not to say **CLOSE**

M ASK HH

HH6 Which area do you live in? Please note, if you are not located in any of these towns/areas, please select the one closest to you.

1. Sutton
2. Purley
3. Cobham
4. Leatherhead
5. Dorking
6. Reigate & Banstead
7. Redhill
8. Horley/Gatwick
9. Caterham
10. Coulsdon
11. Edenbridge
12. Sevenoaks
13. Epsom
14. Elmbridge
15. Oxted
16. None of the above

S ASK ALL

HH7 Do any of the following apply to you?

Please select all that apply

1. I do not have internet access
2. I have not used the internet in last six months
3. I have only used the internet in last six months to send emails
4. I have low confidence as an internet user
5. I have internet access but I dislike using it or avoid using it as much as possible
6. None of the above

QHIDDIGITALLYDISENGAGED: HH7=1-5

S ASK IF HH

HH8 Which of the following categories best describes the employment status of the highest income earner in your household?

1. Semi or unskilled manual worker (e.g., caretaker, non-HGV driver, shop assistant, etc.)

2. Skilled manual worker (e.g., bricklayer, carpenter, plumber, painter, bus driver, HGV driver, pub/bar worker, etc.)
3. Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., office worker, salesperson, etc.)
4. Intermediate managerial/ professional/ administrative (e.g., newly qualified (under 3 years) doctor or solicitor, middle manager in large organisation, principal officer in civil service/local government, etc.)
5. Higher managerial/ professional/ administrative (e.g., doctor, solicitor, board director in a large organisation, top level civil servant/public service employee, etc.)
6. Student
7. Casual worker – not in permanent employment
8. Retired
9. Unemployed
10. Prefer not to say

QHIDSEG:

CODE 1	D
CODE 2	C2
CODE 3 OR 6	C1
CODE 4	B
CODE 5	A
CODE 7 OR 8 OR 9 OR 10	E

S ASK IF HH

HH9 Which of the following statements, best describes your living situation.

1. Adult currently living at home with parents
2. Living with adult family / friends, including partners and adult non-dependent children
3. Living as a single adult, with dependent children/adult
4. Living with one or more other adults, with dependent children/adult
5. Living on my own

S ASK IF HH

HH10 Do you (or your household) rent or own your home?

1. Own home outright
2. Own home with the help of a mortgage or loan
3. Part own and part rent (shared ownership)
4. Rent home (includes being on Housing Benefit or Local Housing Allowance)
5. Live rent-free (including in a relative's/friend's property)
6. Other (please specify)

S ASK IF HH

HH11 Which of the following best describes your ethnicity?

Asian or Asian British

1. Indian
2. Pakistani
3. Bangladeshi
4. Chinese
5. Any other Asian background

Black, Black British, Caribbean or African

6. Caribbean
7. African
8. Any other Black, Black British, or Caribbean background

Mixed or multiple ethnic groups

9. White and Black Caribbean
10. White and Black African
11. White and Asian
12. Any other Mixed or multiple ethnic background

White

13. English, Welsh, Scottish, Northern Irish or British
14. Irish
15. Gypsy or Irish Traveller
16. Roma
17. Any other White background

Other ethnic group

18. Arab
19. Any other ethnic group

99. Would rather not say

S ASK IF HH

HH12 There are a wide range of factors that could mean anyone might need extra help or support.

Do you feel that any of the following factors apply to **you** or **anyone in your household** at the moment that might mean you need extra support or help during a loss of your water supply or when accessing services provided by your water company – like braille bills, or delivering bottled water to your home if the supply is ever cut off temporarily?

	HH6i You	HH6ii Others in household
1. Chronic/serious illness		
2. Medically Dependant Equipment – e.g. dialysis unit		
3. Oxygen use to manage a condition		
4. Physical Impairment		
5. Unable to answer door		
6. Restricted hand movement		
7. Aged 80 or over		
8. Young children aged 5 or under		
9. Blind		
10. Partially sighted		
11. Hearing /speech difficulties (including deaf)		
12. Unable to communicate in English		
13. Dementia		
14. Developmental condition		
15. Mental Health condition		
16. Temporary life change for example post hospital recovery, unemployment, new-born infant in the house		

17. None of the above	EXCLUSIVE		
18. Prefer not to say		EXCLUSIVE	

QHIDVULNERABLE:

- 1 VULNERABLE - IF SELECT CODES 1-16 AT HH12 OR AGED 80+ AT HH5**
- 2 NOT CURRENTLY VULNERABLE – IF SELECT CODE 17 or 18 AT HH12, AND AGED UNDER 80 AT HH5**

S ASK HH

11. **HH13** Which of the following best describes the area where you live?

- 12.
1. City location
 2. Other urban location
 3. Semi-rural
 4. Rural
 5. Don't know

S ASK IF HH

HH13a Thinking about your household finances over the last 12 months, how often, if at all, have you struggled to pay at least one of your household bills? Please select one option

1. All of the time
2. Most of the time
3. Sometimes
4. Rarely
5. Never

M ASK ALL WHO CODE 1 – 4 AT HH14a

HH14b Which, if any, of the following statements apply to you when thinking about the past 12 months? Please select all that apply

1. I have asked family/friends to borrow money
2. I have taken out a short-term loan
3. I have taken out more on an existing loan
4. I have used food banks
5. I have spoken to the companies I pay bills to about financial help
6. I have cut back on non-essential spending (e.g. holiday travel, entertainment subscriptions, etc.)
7. I have fallen behind on rent/mortgage payments
8. I have fallen behind on my loan payments
9. I have fallen behind on utility bills
10. I have used credit cards to pay bills
11. I have used my overdraft to pay bills
12. I have used debt charities for financial help (e.g. Stepchange)
13. I have received another type of financial help
14. Other (please specify)
15. None of these

QHIDFINAVULNERABLE:

- 1 FINANCIALLY VULNERABLE IF SELECT CODES 1 OR 2 AT HH14a OR TWO OR MORE CODES AT HH14b**

S ASK HH

HH15 In the last 2 years, have you experienced any issues with your water supply such as an interruption to the supply, a leak or discoloured water?

1. Yes, water supply issues
2. Yes, customer service/ billing issues
3. No issues/ sewerage issues
4. Don't know

S ASK ALL

HH16 Is your property on a water meter?

1. Yes, metered
2. No, unmetered
3. Don't know

Pre-task reading for SES Water research

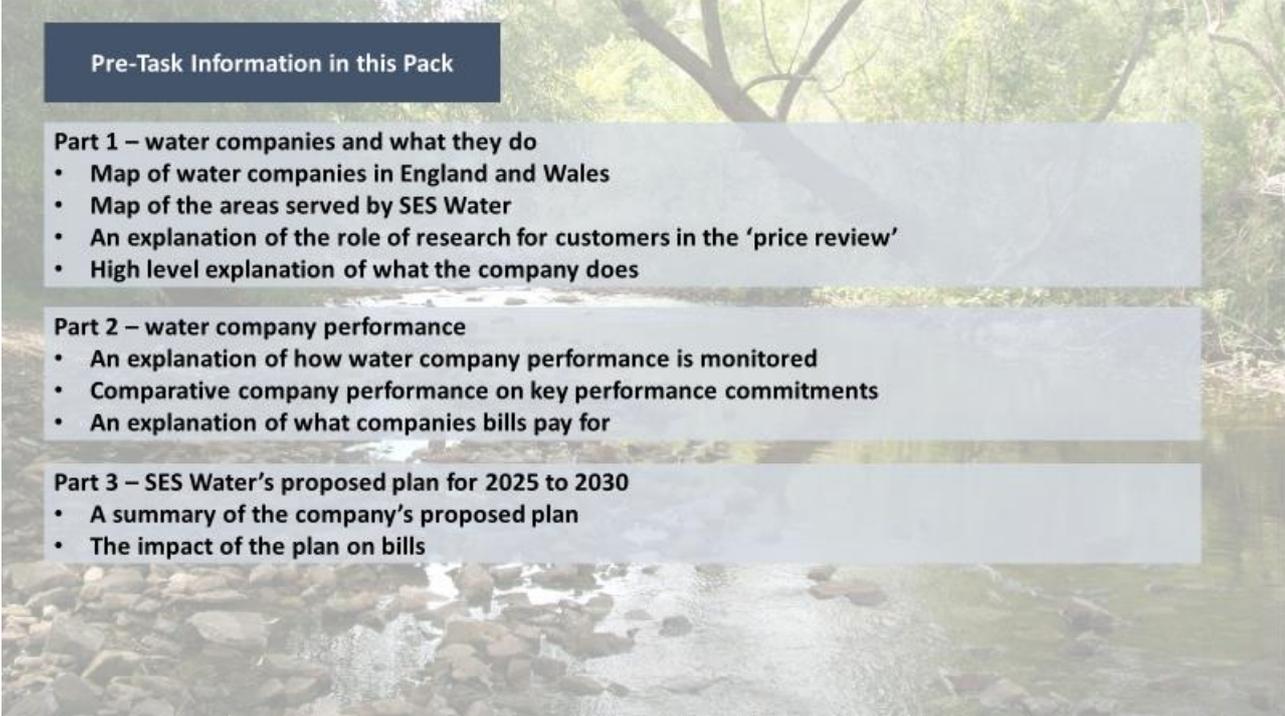


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Pre-Task Information in this Pack

Part 1 – water companies and what they do

- Map of water companies in England and Wales
- Map of the areas served by SES Water
- An explanation of the role of research for customers in the 'price review'
- High level explanation of what the company does

Part 2 – water company performance

- An explanation of how water company performance is monitored
- Comparative company performance on key performance commitments
- An explanation of what companies bills pay for

Part 3 – SES Water's proposed plan for 2025 to 2030

- A summary of the company's proposed plan
- The impact of the plan on bills

Part 1

Water companies and what they do

Water companies in England and Wales

Water companies are regional: people have to receive water services from the company that covers where they live

- There are 11 water companies that provide **both water and sewerage services**
- There are also 5 companies that provide water services only – **SES Water is a water only company**
- Some households have two separate suppliers:
- e.g. people in SES Water's supply area receive **water services from SES Water** and **sewerage services from Thames Water or Southern Water**



SES Water's supply area

- SES Water supply drinking water to 745,000 people and 8,000 businesses in parts of Surrey, West Sussex, Kent and South London
- Thames Water supply the wastewater services to the majority of our customers
- Southern Water supply the wastewater services to customers in the Kent area



The role of customers in a price review process



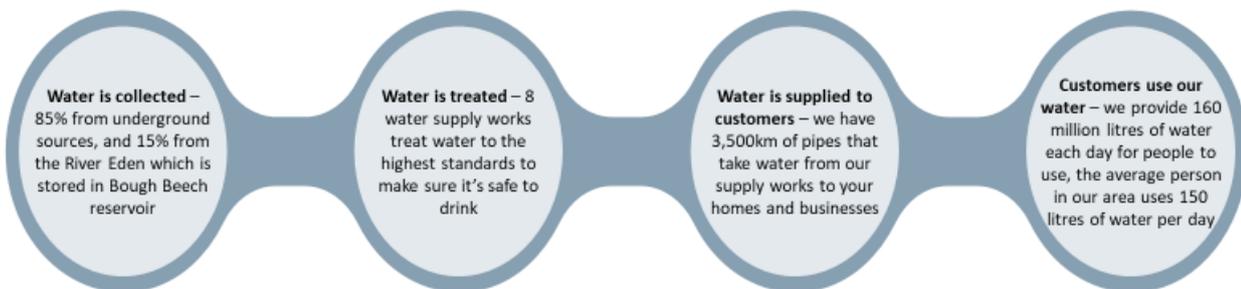
Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As customers are not able to choose their water company, water companies must give them a say about what they want from their services and the price they pay. Talking to customers also helps water companies prioritise what to do first or what to do most of – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.

The business plan and prices are then finalised by Ofwat in a process known as the **Price Review**. There is more information about this here: 'All about the price review'. Available at: <https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are 'acceptable' to you and whether you can afford the proposed bills from 2025-2030. Companies also have to show to Ofwat that their plans reflect what their customers want – that means refining the plans based on what customers tell them.

What SES Water do

Water supply (SES Water):



Wastewater service (Thames Water)

- **Wastewater is removed** – wastewater is taken away from homes through a network of sewers and pumping stations
- **Wastewater is treated** – wastewater treatment works clean the wastewater so that it can be safely returned to the environment

- **Customers are billed** – we bill customers for our water supply service and provide the bills on behalf of Thames Water for their wastewater service (if you are a Southern Water wastewater customer you will receive two bills)

How water companies are monitored

Water companies are currently part way through their five-year business plan for 2020 to 2025. They have service level targets, called ‘performance commitments’, in every five-year business plan. These targets are based on what customers have previously told companies they would like them to do, and on Ofwat’s assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

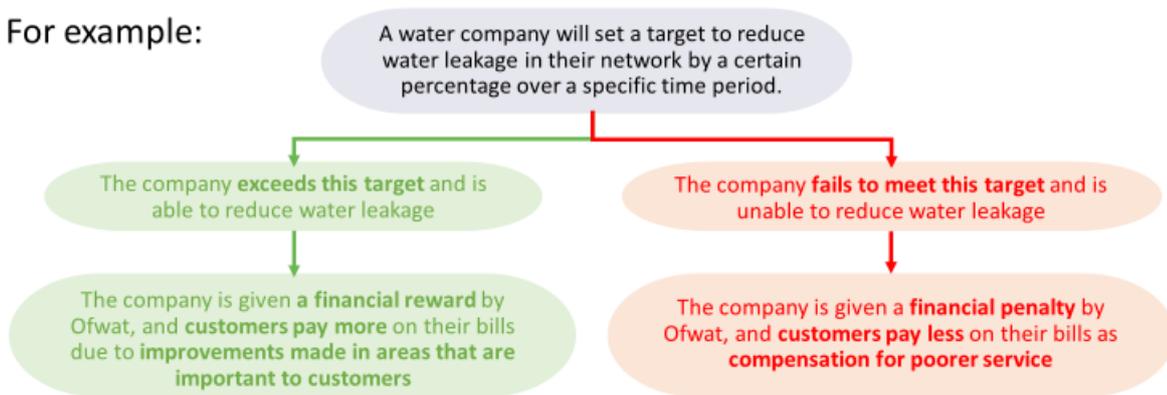
Water companies have to provide reliable services, and plan for their services to be resilient to changing weather patterns and demand from consumers. Companies can miss or exceed performance commitment targets for a number of reasons. For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets.



How water companies are monitored continued...

As part of their responsibility to provide clean and safe water to households and businesses, regulators set targets and performance standards for UK water companies. Outcome Delivery Incentives (ODIs) are a part of this framework and act as a system of financial rewards and penalties that are placed to encourage water companies to perform beyond their committed levels of service in order to benefit customers, the environment, and improve overall service.

For example:



In 2021/22 SES Water passed 17 and failed 8 performance commitment targets, costing them a penalty of £0.3m (equating to a £1.30 decrease on the average household bill)

Part 2

We are now going to show you how well SES Water is doing on some of their performance commitments, compared to other water companies in England and Wales.

These performance commitments are a snapshot out of the wide range of services companies provide. We are showing these examples as customers have told us they are particularly important to them.

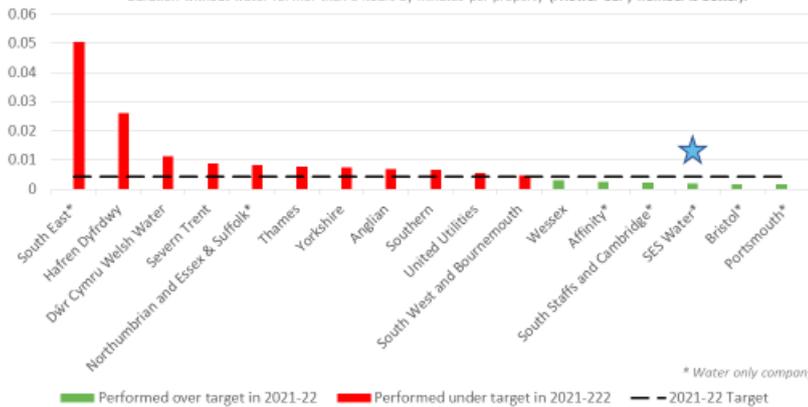
Water supply interruptions

Water supply interruptions, without warning, for longer than 3 hours.

If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Water companies measured on the length of time properties are without water

Duration without water for more than 3 hours by minutes per property (A lower bar / number is better).



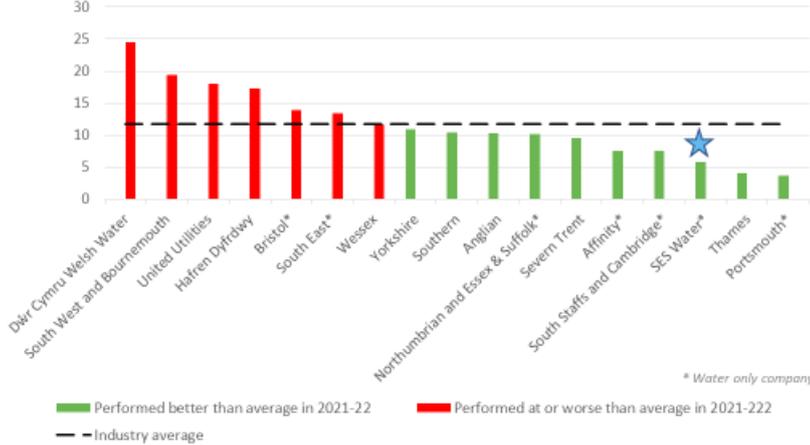
Company performance against targets (a lower percentage is better)	
Water and Sewage company	Performance against target
Portsmouth*	-62%
Bristol*	-59%
SES Water*	-52%
South Staffs and Cambridge*	-47%
Affinity*	-39%
Wessex	-32%
South West	+11%
United Utilities	+30%
Southern	+53%
Anglian	+60%
Yorkshire	+73%
Thames	+80%
Northumbrian and Essex & Suffolk	+92%
Severn Trent	+106%
Dŵr Cymru Welsh Water	+164%
Hafren Dyfrdwy	+511%
South East*	+1083%

Taste, smell and appearance of water

Tap water may taste/smell/look different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Water companies measured on number of customer contacts regarding the taste, smell and appearance of tap water

Number of customer contacts received regarding incidents, per 10,000 people supplied (A lower number is better).



Company performance against industry average (a lower percentage is better)

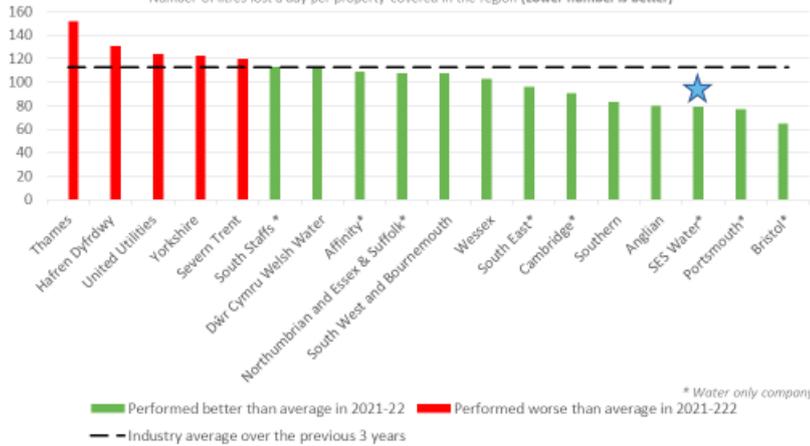
Water and Sewage company	Performance against industry average
Portsmouth*	-68%
Thames	-66%
SES Water*	-50%
Affinity*	-35%
South Staffs and Cambridge*	-35%
Severn Trent	-19%
Northumbrian and Essex & Suffolk*	-14%
Anglian	-12%
Southern	-11%
Yorkshire	-7%
Wessex	+/-0%
South East*	+15%
Bristol*	+19%
Hafren Dyfrdwy	+48%
United Utilities	+54%
South West	+66%
Dŵr Cymru Welsh Water	+109%

Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Water companies measured on the amount of water lost due to leaks from water mains and pipes.

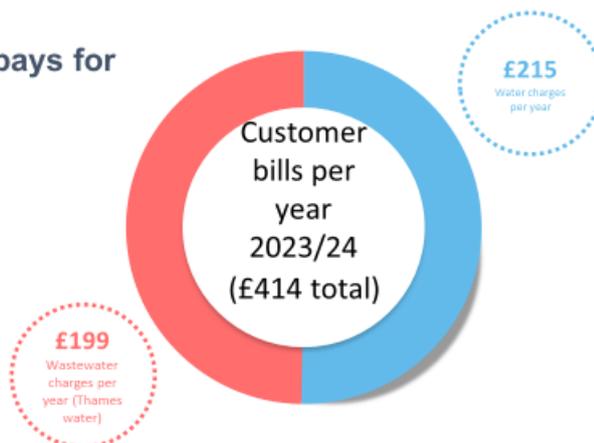
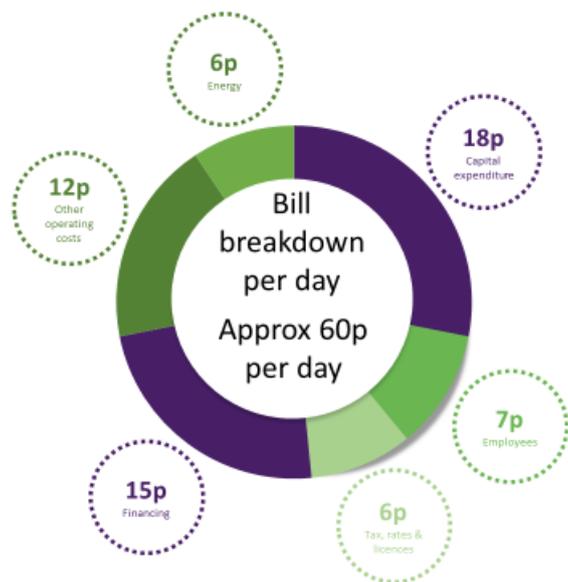
Number of litres lost a day per property covered in the region (Lower number is better)



Company performance against the industry average (a lower percentage is better)

Water and Sewage company	Performance against 3 year average
Bristol*	-42%
Portsmouth*	-32%
SES Water*	-30%
Anglian	-29%
Southern	-27%
Cambridge*	-19%
South East*	-15%
Wessex	-9%
Northumbrian and Essex & Suffolk*	-4%
South West	-4%
Affinity*	-4%
Dŵr Cymru Welsh Water	-1%
South Staffs*	+/-0%
Severn Trent	+6%
Yorkshire	+9%
United Utilities	+10%
Hafren Dyfrdwy	+16%
Thames	+35%

What the money from customer bills pays for



Our average bill today is **£215 per year** – just over **60p per day**.

The average bill when combined with wastewater charges is **£414 per year** (Thames Water customers)

Part 3

SES Water's proposed Business Plan for 2025 to 2030

			
Provide you with high quality water from sustainable sources	Deliver a resilient water supply from source to tap	Help you reduce your water footprint and charge a fair price	Improve the environment and have a positive impact on our local area
<ul style="list-style-type: none"> Continue to meet the highest quality standards by maintaining and investing in our water treatment works Work with farmers to stop nitrates and pesticides from entering our water sources Replace lead pipes that supply schools and nurseries Confirm where we need to reduce how much water we take from the environment to protect the chalk streams in our area 	<ul style="list-style-type: none"> Reduce leakage by 30% (from 2017/18 levels) Use our smart network to help us find and fix leaks more quickly Use smart meters to find leaks on customers' pipes and help fix them Manage the pressure in our water mains so less water is lost This investment will also help us reduce supply interruptions and main bursts 	<ul style="list-style-type: none"> Reduce our customers' water consumption by 20 litres to 131 litres per person per day Provide smart meters to households and businesses Use data from smart meters to help us provide customers with help and advice, targeting higher users Expand the impact of our education programme to embed the importance of water saving Develop our social tariff to help people struggling to pay 	<ul style="list-style-type: none"> Invest in schemes required by law to protect wildlife Work with partners to enhance the River Eden and make our water supplies more resilient Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs Continue to improve biodiversity on 70% of the land we own Make more of our land accessible to the community

Areas of Investment

The average SES Water bill will be, on average, **£19** more per year between 2025 and 2030 if we deliver all the investments in our **preferred plan**, than in 2025

- £12 is to meet the higher standards required by law and regulation (black)
- £7 is to improve our performance over and above this (white) which are optional

The average combined bill when Thames Water's wastewater services are included will rise by **£79 per year** (on average) between 2025 and 2030.

£ Must do These are investments that SES must make.

£ Preferred plan i.e., could do These are discretionary investments. SES proposes these to achieve additional benefits for customers and the environment.



Figures shown do not include inflation

Pre-task reading for SES Water research

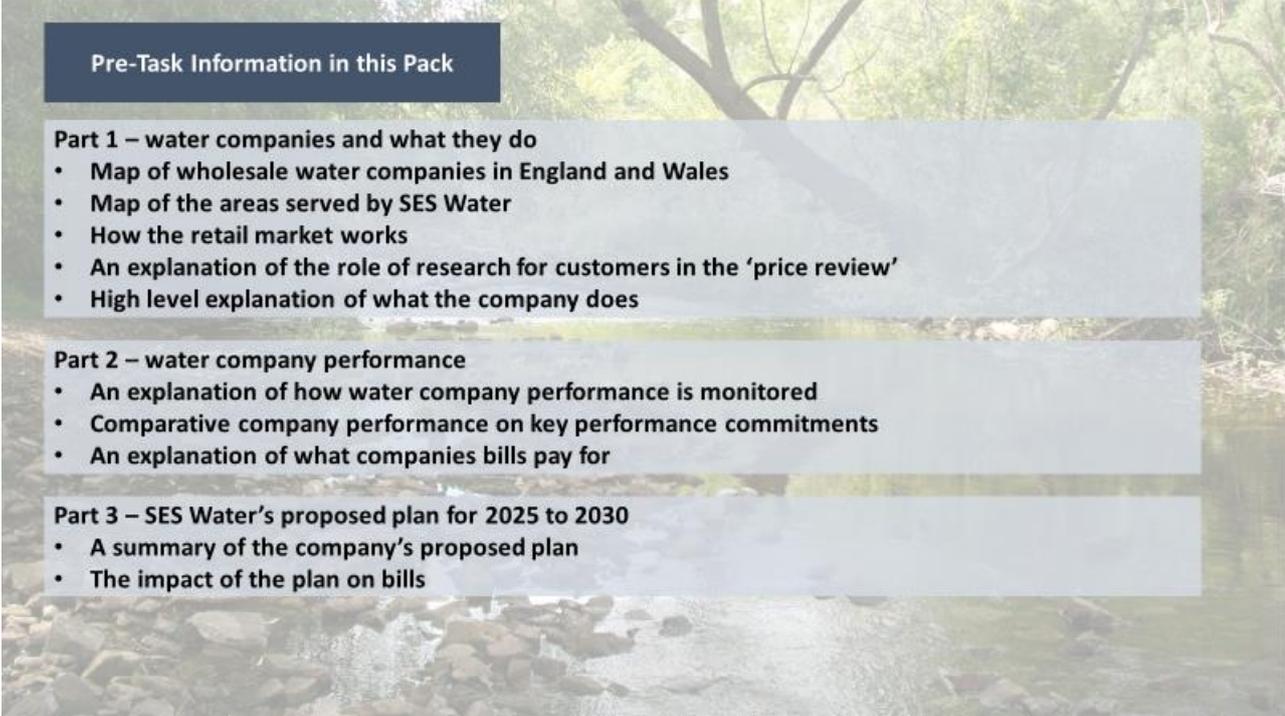


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How the retail market works

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation (the wholesaler), or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries (the retailer). The picture below explains how this arrangement works.



The role of customers in a price review process



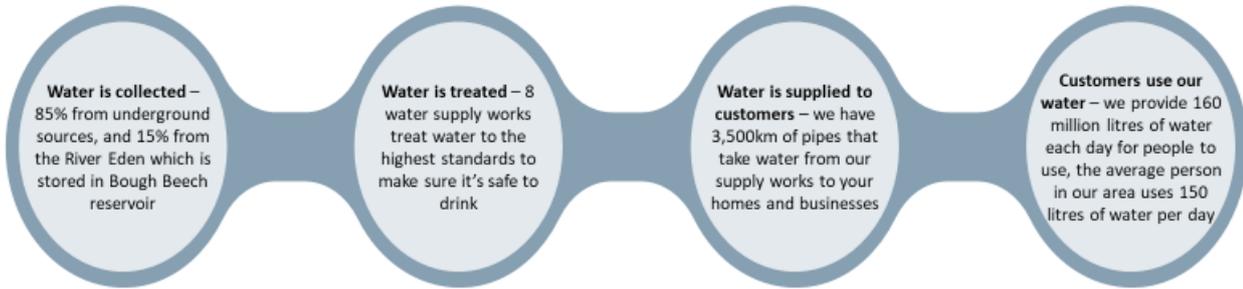
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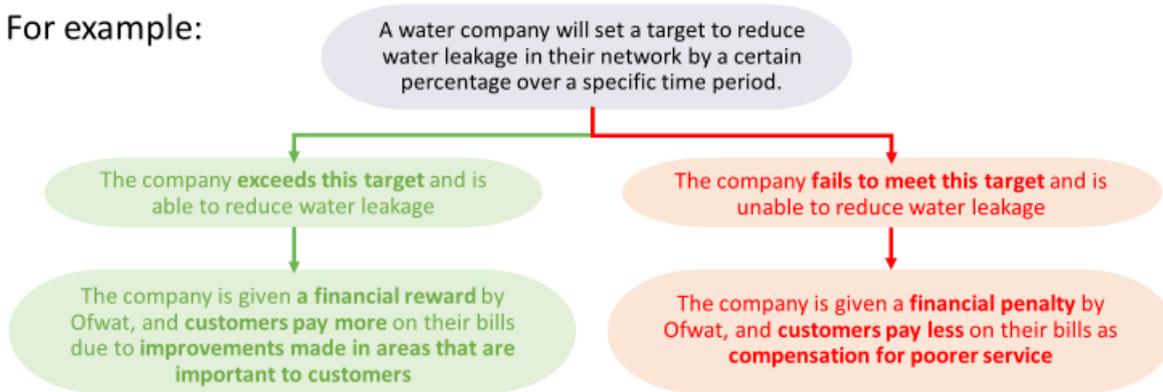
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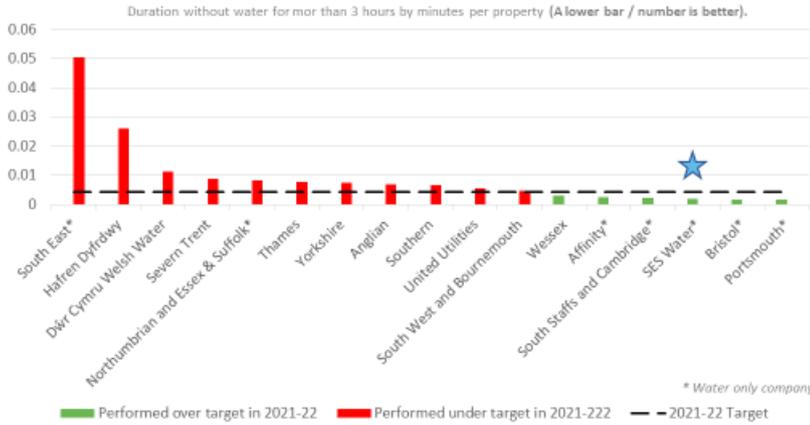
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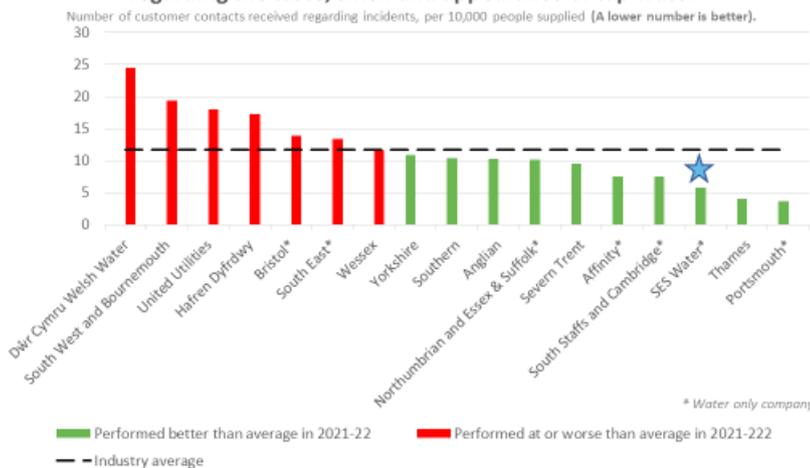


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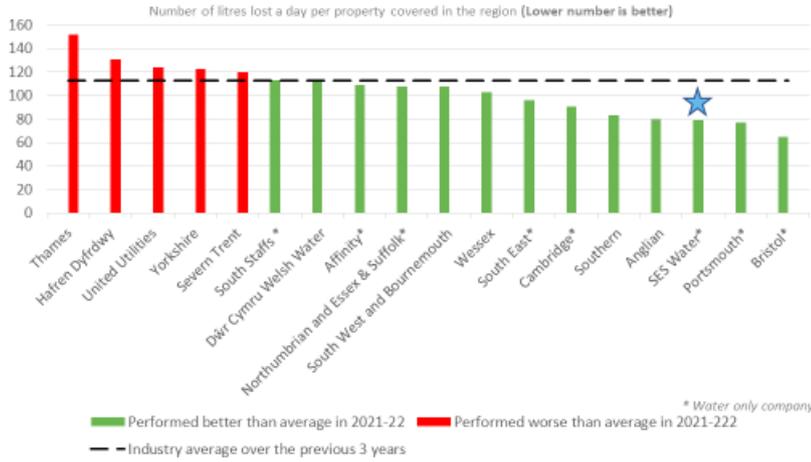


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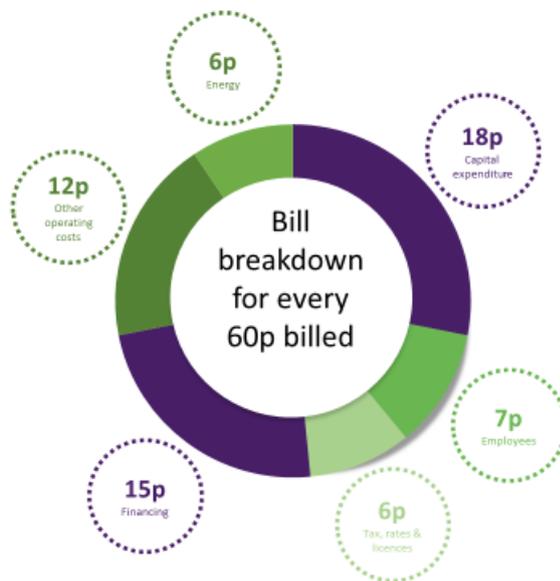
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Wessex	-9%
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South West	-4%
Affinity*	-4%
Dŵr Cymru Welsh Water	-1%
South Staffs *	+/-0%
Severn Trent	+6%
Yorkshire	+9%
United Utilities	+10%
Hafren Dyfrdwy	+16%
Thames	+35%

What the money from customers bills pays for



Part 3

SES Water's proposed Business Plan for 2025 to 2030

			
<p>Provide you with high quality water from sustainable sources</p>	<p>Deliver a resilient water supply from source to tap</p>	<p>Help you reduce your water footprint and charge a fair price</p>	<p>Improve the environment and have a positive impact on our local area</p>
<ul style="list-style-type: none"> • Continue to meet the highest quality standards by maintaining and investing in our water treatment works • Work with farmers to stop nitrates and pesticides from entering our water sources • Replace lead pipes that supply schools and nurseries • Confirm where we need to reduce how much water we take from the environment to protect the chalk streams in our area 	<ul style="list-style-type: none"> • Reduce leakage by 30% (from 2017/18 levels) • Use our smart network to help us find and fix leaks more quickly • Use smart meters to find leaks on customers' pipes and help fix them • Manage the pressure in our water mains so less water is lost • This investment will also help us reduce supply interruptions and main bursts 	<ul style="list-style-type: none"> • Reduce our customers' water consumption by 20 litres to 131 litres per person per day • Provide smart meters to households and businesses • Use data from smart meters to help us provide customers with help and advice, targeting higher users • Expand the impact of our education programme to embed the importance of water saving • Develop our social tariff to help people struggling to pay 	<ul style="list-style-type: none"> • Invest in schemes required by law to protect wildlife • Work with partners to enhance the River Eden and make our water supplies more resilient • Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs • Continue to improve biodiversity on 70% of the land we own • Make more of our land accessible to the community

16. Areas of Investment

The average SES Water bill will be, on average, **9.9%** more per year between 2025 and 2030 if we deliver all the investments in our **preferred plan**, than in 2025

- 6.3% is to meet the higher standards required by law and regulation (black)
- 3.6% is to improve our performance over and above this (white) which are optional

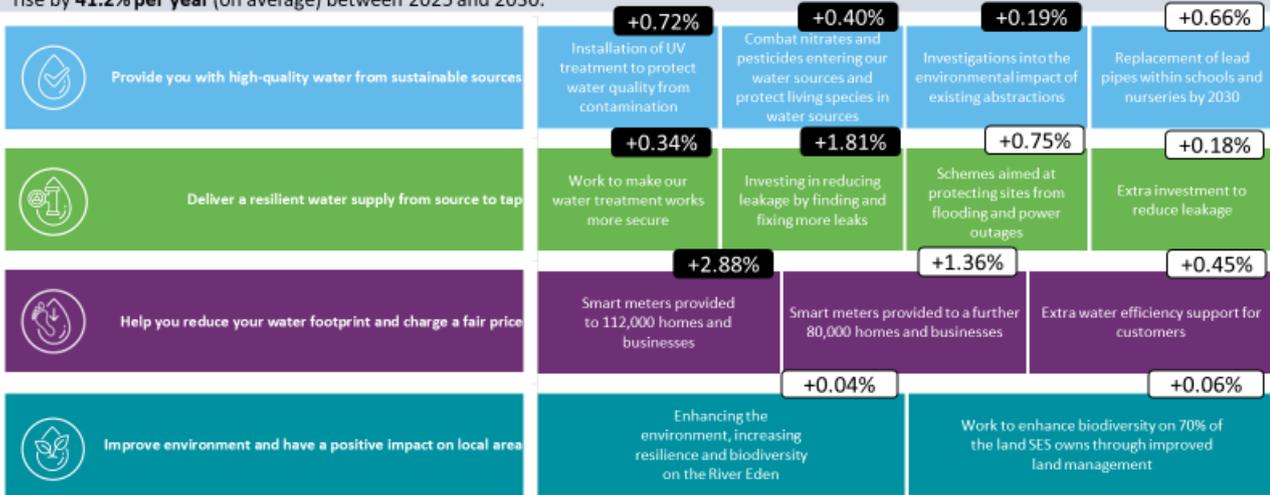
The average combined bill when Thames Water's wastewater services are included will rise by **41.2% per year** (on average) between 2025 and 2030.

£
Must do

These are investments that SES must make.

£
Preferred plan
i.e. could do

These are discretionary investments. SES proposes these to achieve additional benefits for customers and the environment.



Figures shown do not include inflation

Pre-task reading for SES Water research

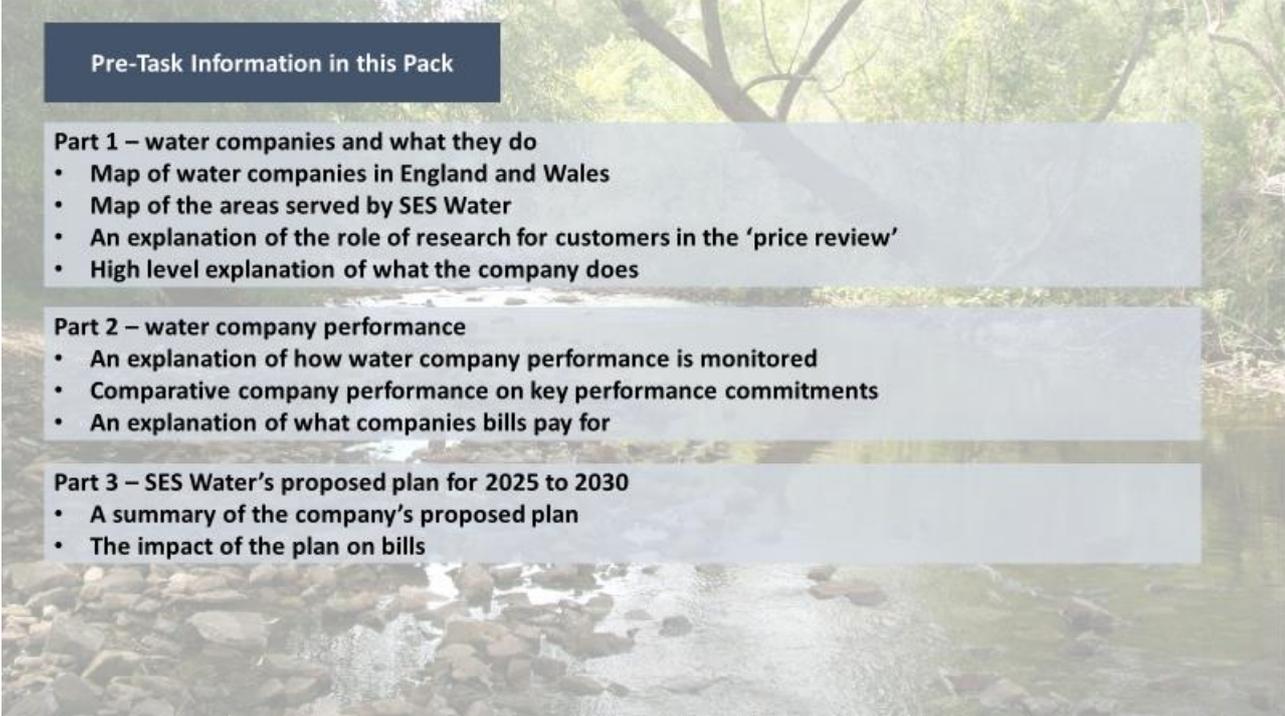


Introduction

Thank you for agreeing to participate in the upcoming focus group on behalf of SES Water.

We are Impact, an independent market research agency. SES Water has commissioned us to set-up and run this research and we will be present at all the online focus group sessions. We are very much looking forwards to hearing your views about water services over the coming weeks.

As mentioned, when we first contacted you about participating, there are also pre-task and post-task activities to complete relating to material that will be discussed in the online focus groups. Please have a browse through this information and think about each step as you read through. Please do not worry if you do not understand or remember all of the information as there will be a recap and time for questions at the outset of the discussion during the focus group. This pre-task should take no more than 10 minutes to complete.



Pre-Task Information in this Pack

Part 1 – water companies and what they do

- Map of water companies in England and Wales
- Map of the areas served by SES Water
- An explanation of the role of research for customers in the 'price review'
- High level explanation of what the company does

Part 2 – water company performance

- An explanation of how water company performance is monitored
- Comparative company performance on key performance commitments
- An explanation of what companies bills pay for

Part 3 – SES Water's proposed plan for 2025 to 2030

- A summary of the company's proposed plan
- The impact of the plan on bills

Part 1

Water companies and what they do

Water companies in England and Wales

Water companies are regional: people have to receive water services from the company that covers where they live

- There are 11 water companies that provide **both water and sewerage services**
- There are also 5 companies that provide water services only – **SES Water is a water only company**
- Some households have two separate suppliers:
 - e.g. people in SES Water's supply area receive **water services from SES Water** and **sewerage services from Thames Water or Southern Water**



SES Water's supply area

- SES Water supply drinking water to 745,000 people and 8,000 businesses in parts of Surrey, West Sussex, Kent and South London
- Thames Water supply the wastewater services to the majority of our customers
- Southern Water supply the wastewater services to customers in the Kent area



The role of customers in a price review process



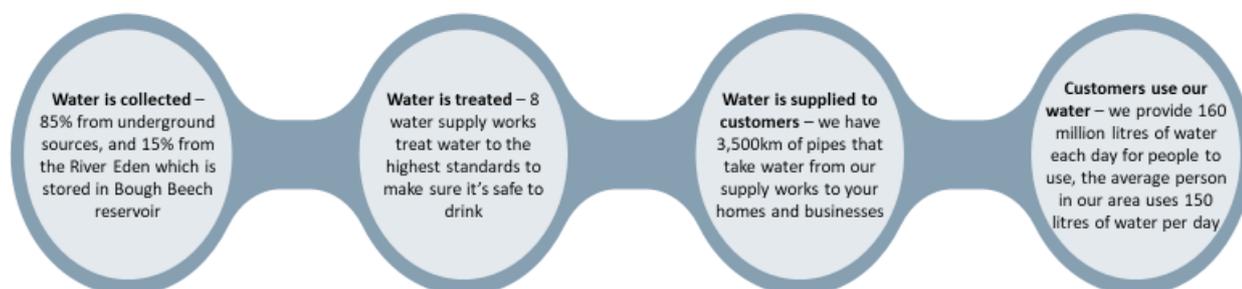
Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As customers are not able to choose their water company, water companies must give them a say about what they want from their services and the price they pay. Talking to customers also helps water companies prioritise what to do first or what to do most of – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.

The business plan and prices are then finalised by Ofwat in a process known as the **Price Review**. There is more information about this here: 'All about the price review'. Available at: <https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are 'acceptable' to you and whether you can afford the proposed bills from 2025-2030. Companies also have to show to Ofwat that their plans reflect what their customers want – that means refining the plans based on what customers tell them.

What SES Water do

Water supply (SES Water):



Wastewater service (Thames Water)

- **Wastewater is removed** – wastewater is taken away from homes through a network of sewers and pumping stations
- **Wastewater is treated** – wastewater treatment works clean the wastewater so that it can be safely returned to the environment

- **Customers are billed** – we bill customers for our water supply service and provide the bills on behalf of Thames Water for their wastewater service (if you are a Southern Water wastewater customer you will receive two bills)

How water companies are monitored

Water companies are currently part way through their five-year business plan for 2020 to 2025. They have service level targets, called ‘performance commitments’, in every five-year business plan. These targets are based on what customers have previously told companies they would like them to do, and on Ofwat’s assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

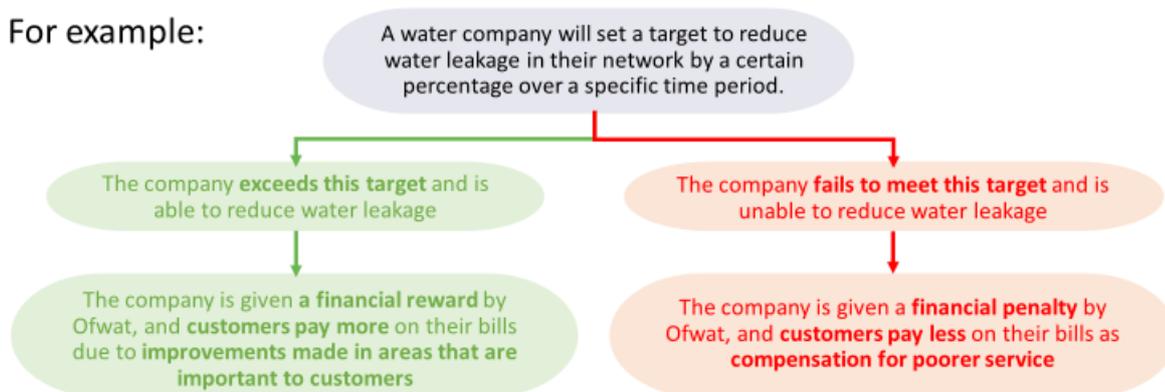
Water companies have to provide reliable services, and plan for their services to be resilient to changing weather patterns and demand from consumers. Companies can miss or exceed performance commitment targets for a number of reasons. For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets.



How water companies are monitored continued...

As part of their responsibility to provide clean and safe water to households and businesses, regulators set targets and performance standards for UK water companies. Outcome Delivery Incentives (ODIs) are a part of this framework and act as a system of financial rewards and penalties that are placed to encourage water companies to perform beyond their committed levels of service in order to benefit customers, the environment, and improve overall service.

For example:



In 2021/22 SES Water passed 17 and failed 8 performance commitment targets, costing them a penalty of £0.3m (equating to a £1.30 decrease on the average household bill)

Part 2

We are now going to show you what SES Water do to help customers that need additional support and then where bill money is spent

What does SES do for their customers

SES remains committed to delivering excellent customer service that is able to meet the needs of all of our customers. So what are we doing currently?



We carry out regular surveys with customers to understand how helpful our range of extra services are (both financial and non-financial). Last year 81% of customers who were on one of our extra services felt that they were helpful.

We also ask customers who aren't on them if they are aware of the support on offer. Currently, less than 40% of our customer base is aware of what is on offer, so we have more work to do. So what will we do?

• Community engagement

Our trained customer care team work in the community promoting the schemes and services on offer. This can be at community events, food banks, over 65 forums, family and children's centres as well as working with stakeholders and partners attending team briefings and open days.

We are also running research and have regular stakeholder sessions to ensure that the schemes design and access to it are suitable.

• Trusted partnerships

We have recently signed up our first trusted partner who will accept applications for our schemes on our behalf. Our new approach is intended to make the process of registering for our service and financial support schemes far simpler for our customers and this will also help increase awareness.

We'll work with the industry to share data about customers who require priority services with electricity and gas providers so that those that need extra help are identified and registered automatically with all their suppliers.

• Promotion

We will increase the communications we send out to our customers relating to the extra services on offer.



Financial support schemes

We offer a suite of schemes and discounts to support our customers who are struggling financially. Currently we have 20,100 households on one of these schemes and by the end of 2024 we will increase this to over 25,000. These schemes include:

Water Support

Water Support is a 50% bill reduction scheme funded by adding £6 to non-eligible customers' annual bills and underwritten by our shareholders who cover the remaining balance in excess of our customer contributions. Customers' eligibility for the scheme is based on their yearly gross household income. Less than £17,005 before any deductions, if they don't live in a London borough (£21,749 if they do live in a London borough).

Breathing Space

A way to pause payments for customers who need help getting back on their feet if they have experienced a change in certain personal circumstances that has had an unexpected negative impact on income; such as illness, redundancy or bereavement. We will pause payments for up to 3 months.

Direct Water Payments (third-party deductions)

Customers in receipt of certain benefits and have over £50.00 of debit on their account can combine their yearly bill with any other bill arrears into one weekly payment. This payment goes straight from their benefits. Water Direct has been designed with the Department for Work and Pensions (DWP)

Water Sure

A capped tariff for metered customers so they pay whichever bill is lower – the one based on their actual usage, or an average household bill. To qualify for this tariff customers need to be in receipt of certain benefits and have 3 children under 19 living with them or be suffering from or receiving treatment for a qualifying medical condition which means they need to use more water

For those customers who do not meet the qualifying criteria for our financial support schemes we offer flexible repayment plans. We are always willing to look at repayment of debt on an individual basis, depending on our customers financial situation.



Non-financial support schemes

Priority Services Register (PSR)

The PSR is free to join. It helps utility companies like us look after customers who have health, access or extra communication needs and helps us tailor our services to support households who need extra help.

The PSR includes a range of additional services we offer to make managing your account as easy as possible. We also offer extra support in the event of a water supply emergency. They include:

- Individual notification in emergencies
- Braille, large print and audio/CD services
- Text Relay Service
- Home dialysis users and patients convalescing at home
- Password scheme to protect from bogus callers
- Nominated correspondent to speak on your behalf
- Financial assistance depending on different eligibility criteria

Currently we have 20,500 customers on the PSR scheme and anticipate that by the end of 2024 this will have grown to 25,000.

Recite me Accessibility and Language toolbar

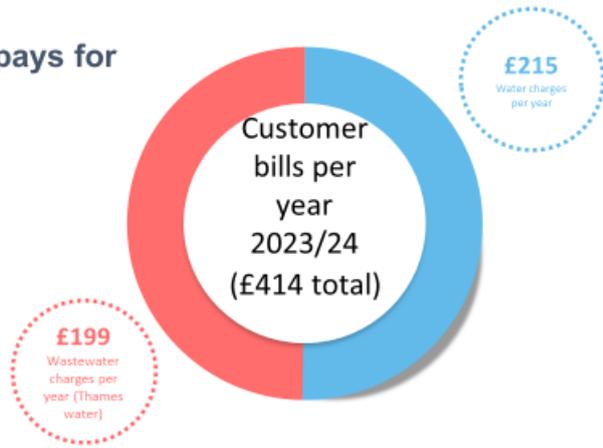
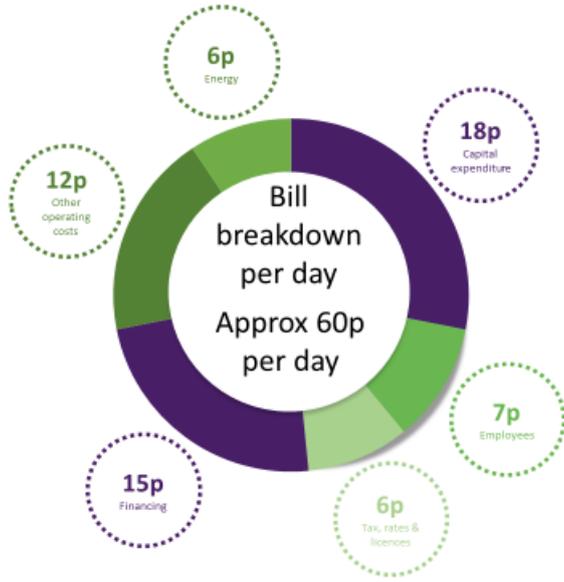
This tool allows customers to change the accessibility settings to help you get the most out of our website. It includes options to adjust the ruler, screen mask, magnifier, margins and a dictionary. The toolbar also quickly and easily translates all our web content into over 100 languages, including 35 text to speech voices.

Over 600 customers a month use this tool to help them navigate our website.

Bereavement life ledger

We have partnered with LifeLedger a free service that allows customers to close, freeze, switch or transfer billing and service related accounts following a bereavement quickly and easily and from one place.

What the money from customer bills pays for



Our average bill today is **£215 per year** – just over **60p per day**.

The average bill when combined with wastewater charges is **£414 per year** (Thames Water customers)

Part 3

SES Water’s proposed Business Plan for 2025 to 2030

Provide you with high quality water from sustainable sources	Deliver a resilient water supply from source to tap	Help you reduce your water footprint and charge a fair price	Improve the environment and have a positive impact on our local area
<ul style="list-style-type: none"> Continue to meet the highest quality standards by maintaining and investing in our water treatment works Work with farmers to stop nitrates and pesticides from entering our water sources Replace lead pipes that supply schools and nurseries Confirm where we need to reduce how much water we take from the environment to protect the chalk streams in our area 	<ul style="list-style-type: none"> Reduce leakage by 30% (from 2017/18 levels) Use our smart network to help us find and fix leaks more quickly Use smart meters to find leaks on customers' pipes and help fix them Manage the pressure in our water mains so less water is lost This investment will also help us reduce supply interruptions and main bursts 	<ul style="list-style-type: none"> Reduce our customers' water consumption by 20 litres to 131 litres per person per day Provide smart meters to households and businesses Use data from smart meters to help us provide customers with help and advice, targeting higher users Expand the impact of our education programme to embed the importance of water saving Develop our social tariff to help people struggling to pay 	<ul style="list-style-type: none"> Invest in schemes required by law to protect wildlife Work with partners to enhance the River Eden and make our water supplies more resilient Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs Continue to improve biodiversity on 70% of the land we own Make more of our land accessible to the community

Areas of Investment

The average SES Water bill will be, on average, **£19** more per year between 2025 and 2030 if we deliver all the investments in our **preferred plan**, than in 2025

- £12 is to meet the higher standards required by law and regulation (black)
- £7 is to improve our performance over and above this (white) which are optional

The average combined bill when Thames Water's wastewater services are included will rise by **£79 per year** (on average) between 2025 and 2030.

£
Must do

These are investments that SES must make.

£
Preferred plan
i.e., could do

These are discretionary investments. SES proposes these to achieve additional benefits for customers and the environment.



Figures shown do not include inflation

7.1.5 HH Deliberative event Discussion Guide

GROUP STRUCTURE (3 HOURS):

AREA OF DISCUSSION	TIME ALLOCATION
1. Moderator introductions	10 minutes
2. Respondents' introduction	5 minutes
3. Reactions to the recruitment process and pre-task	5 minutes
4. Introduction to SES Water	10 minutes
5. Recap on the pre-task information	20 minutes
6. Comfort break	5 minutes
7. Long term picture to 2050	15 minutes
8. Household finances and the cost-of-living crisis	10 minutes
9. Overall commitments	20 minutes
10. Deep dive into different areas	75 minutes
11. Wrap up	5 minutes

Moderator introduction (10 minutes):

- Moderator Introduce yourself
- Explain that the research is part of a study being conducted on behalf of SES Water, who are responsible for operating and maintaining the drinking water network (not the waste water system) in your region.
- The purpose of this discussion is to understand your views and perceptions on SES Water including its performance and the water bills you/your organisation pays for the services it provides in the future. The company will be using your feedback to help **develop their business plan for 2025-2030**.
- Confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible. **All suggestions are welcome.**
- The discussion will last around **3 hours, including breaks!**
- Explain the moderator's role and set out 'rules' (speak loudly/ clearly/ not all together)
- Explain audio and video recording, and members of the Impact and SES team observing (name individuals)
- Any questions?

Respondents' introduction (5 minutes)

Respondents will be split into five pre-defined groups, one led by lead moderator and the other four by other members of the Impact team.

- Each respondent will be asked to introduce themselves to the group

Reactions to the recruitment process and pre-task (5 minutes):

- As a starting point, how did you find the recruitment process?
 - Was it easy to join the session?
- Did you think this was legitimate research?
 - If no, why not? What else could have been done to reassure you?
- Did you have any concerns about joining?
 - What were they?
- Were you able to complete the pre-task?
 - How did you find it?
 - Was it easy or difficult to read through?
- Is there anything in the material you read which was difficult to understand?
- What surprised you the most out of the things you have read?
- What would you most like to find out more about?
- Has any of the information you have seen changed your opinion on SES Water in any way?
 - Probe on how
- **Future customers: Did you have knowledge on SES Water before reading the pre-task?**
 - **What interested you most?**
 - **Did it raise any queries about how the water industry works?**
- **What is it you are looking for from a water supplier?**
 - **How will this change when you come to paying bills?**

Introduction to SES Water (10 minutes):

- Had you heard of SES Water before completing the pre-task?
- Is anyone aware what SES does and the role they play?

Moderator: Show stimulus slides 1, 2 and 3 to explain role of SES, ensuring to explain that SES is a water only company and that session will focus on water services.

- Has anyone ever had any contact with SES?

- When was this?
- What did you contact them about?
- What are your “top of mind” perceptions of SES?
- What do you think about the quality of the service you receive from SES. How would you rate the quality of service if asked on a scale of 1-5? Is it good or not?
 - Why or why not
- How do you think they compare to other water companies?
 - Has anyone been served by a different water company in the past? If so, any thoughts on what is different between them and SES? What is the same between them?

Recap on the pre-task information (20 minutes):

Moderator read out: Now we are going to briefly run through the information you were shown in the pre-task

Show slide 4: The role of customers, show video if needed

- Does that make sense to everyone?
- Was anyone aware of this? Have you seen a business plan from SES Water, or another water supplier before?

Show slides 5 and 6: How water companies are monitored

- Does that make sense to everyone?

Show slides 7-9: Performance levels

- Does that make sense to everyone?
- What are your initial thoughts on these industry comparisons?
 - Any surprises?
 - Any concerns – where they need to do better?
 - Has seeing these comparisons change how you feel about SES Water?
 - Anything else you would like to see performance comparisons on?

Show slide 10: Customer bills

- Does that make sense to everyone?
- Is the distinction between clean and waste water bills clear?

- What do you think about value for money – think about how much you pay and what value you get from your water services as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not?
 - Why or why not?
- **Future customers: do you feel that amount of money is good value for the service provided?**
 - **How do you think that compares to other services provided?**
 - **Do you think the split between clean water and waste water is fair?**
- How does VFM for water services compare to waste water services? Do you think it is right that they are approximately the same?
 - Should one be higher than the other?

Additional information for moderator, if required:

If respondents are getting confused with water and waste water, some examples of services completed by waste water provider are below:

- *Operate wastewater treatment works, where water is cleaned*
- *Release treated water back into lakes, rivers and seas*
- *Monitor rainwater going into sewers, ensure sewers don't overflow and cause flooding*
- Thinking about the pre-task information on the whole, which areas do you feel matter most to you?
 - Why is that?
- Imagine if you were responsible for assigning investments out towards these areas. Where do you think investment is most needed?

Comfort break (5 minutes)

Long-term picture to 2050 (15 minutes):

Moderator read out: SES Water have set out a number of ambitions, that would to have achieved by 2050. These have been set to face various challenges, which are as follows

Show slide 11 and 12:

- Were you aware of any of these challenges facing water supplies in the South East?
 - If so, which?
- Were there any that you weren't aware of?

- Are you surprised by any these challenges and their scale?
- What role do you think technology could play in the future?

Show slide 13: Long term ambitions

- What are your initial thoughts on these long-term ambitions?
- Do you feel they go far enough?
 - Why? What more could they do?
- Are there any areas that you feel are missing?
- How do you think these targets should be phased across the next 25 years?
 - Should some be done before 2050? If so, which?
 - Are some less of a priority?
- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?

Household finances and the cost-of-living crisis (10 minutes):

Moderator read out: Before we move on to further conversations about SES Water and their business plan, we just wanted to quickly touch on the cost-of-living crisis, and its impact on you. The cost of living started to become a problem for greater numbers of people during the COVID-19 pandemic in 2020-2021, and has been made worse by rising costs in almost every essential sector including energy, food, petrol and other everyday essentials. Average wages are not increasing in line with the rising costs, mortgage rates have increased and many are still recovering from the impacts of the pandemic on their businesses.

- Has the cost-of-living crisis affected you?
 - How?
 - When did you start to feel an impact?
 - Was this after a certain event?

- Why do you think this is?
- Have you made any changes to the way your household/business is run as a result (focus on last 12 months especially)?
 - Have you stopped doing anything because of worrying about making ends meet?
 - Are the changes enough?
 - How has it affected your household making changes like this? Difficult? Easy?
- Do you worry about your future finances, say in the next 1-2 years? In what sense?
- Do you think it has impacted your ability to pay your water, or other utility bills?
 - How so?
- **Future customers: Do you think it has impacted your ability to pay various bills, if you currently pay them?**
- Do you plan to make any changes in future to reduce your spending?
 - What do you think these will be?

Overall commitments (20 minutes)

Moderator read out: We are now planning to build on the proposed business plan summary and comparative company data that you read about in the pre-task.

Show slide 10: Customer bills

Moderator read out: Average household clean water bills for 2022-2023 for SES are likely to increase by up to £19 from 2025. This is not to suggest that your own personal bill will increase by this much, just that on average bills will be going up. Once actual inflation and the rewards and penalties are built-in the bill level might change a little.

- What are your initial thoughts on this?

Moderator read out: In the pre-task, we showed you a short summary of the proposed plan for SES Water. Here are the things they would like to complete between 2025 and 2030.

Show slide 14

- What are your initial thoughts on these proposals? (Note they will be covered in more detail later on)

Moderator read out: These have been split out into commitments that SES Water are proposing to do and commitments that they must make, the ones they are required by law to deliver. The proposed commitments include all of the must-do elements, with further spend allocated to make additional improvements.

Show slide 15: Intro to two plans

Show slide 16: Areas of investment

Moderator read out: The final slide you were sent in the pre-task divided these up, the commitments with a black background are those that SES must do, the ones with a white background are additional commitments SES are proposing. Here you can see the assigned bill value for each of the different commitments

- What are your initial thoughts on the split between must do and proposed?
- And the values assigned to each?

Show slide 17 and 18: Bills from 2030

Moderator read out: As we mentioned earlier, once actual inflation has been taken into account, the overall bill level may be different. Here is the difference in overall cost between the must do and preferred plan, both as a clean water bill only and a combined water and waste water bill.

- What are your initial thoughts on this?

Show slide 19: Phasing investment

Moderator read out: In addition, the way that SES deliver against the commitments could be phased in different ways, in the lead up to 2050. These are three examples, with dummy data, of ways this could happen. Please keep these in mind when answering questions in the next section.

Deep dive into different areas (75 minutes)

Moderator read out: Now we will look at each of the areas specifically. First of all, providing high quality water from sustainable sources. Before we talk about this in detail, we wanted to just share some information on WINEP. WINEP is the Water Industry National Environment Program.

Show slide 20: WINEP

- Does that all make sense for customers?

Moderator read out: Let us just remind you how SES are doing in terms of Taste, smell and appearance of water.

Show slide 8: Taste, smell and appearance of water

Show slide 21: Provide you with high quality water from sustainable sources

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

- **Specifically looking at the commitment around lead pipes, how important is it for SES Water to deliver against this target?**

Show slide 22: Lead replacement

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**

- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?
- **Future customers: Do you think you would be able to afford your water bills with these proposed increases?**

Moderator read out: Next we are going to talk about delivering a resilient water supply from source to tap. Let us just remind you how SES are doing in water supply interruptions and leakage.

Show slide 7: Water supply interruptions and slide 9: Reducing leaks

Show slide 23: Deliver a resilient water supply from source to tap

Additional information for moderator, if required:

- *Resilience of supplies*
 - *Schemes driven by legal SEMD (security) requirements – must do (£1.5m)*
 - *Schemes that are aiming to protect sites from climate change and power outage risks – this is a choice (£5m)*
- *Supply interruptions – long term target is no interruptions by 2050*
 - *Already among best in the industry and outperforming our target. Plan is to at least maintain that level of service – no extra investment required*
 - *We will get indirect benefits from our investment in leakage that will contribute to minimising supply interruptions*
- *Leakage – long-term target is to achieve 50% reduction in leakage by 2040 ahead of the Government’s target*
 - *Investment to reduce leakage through smart technology, finding and fixing leaks more quickly, replacing old water mains and pressure management. The faster roll out of smart meters will help reduce leakage quicker*
 - *Additional suggestion for leakage to be reduced further by pressure management*
- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

- First looking at the commitment around supply interruption, do you think this is an acceptable target?

Show slide 24: Supply interruptions

- **Moving on to, the commitment of protecting the water treatment works, how important is it for SES Water to deliver against the second target?**

Show slide 25: Resilience

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- **Next, looking at the second commitment, leakage reduction, how important is it for SES Water to deliver against the second target?**

Show slide 26 and 27: Leakage reduction

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?

- Are these proposals for bill increases acceptable?
- **Future customers: Do you think you would be able to afford your water bills with these proposed increases?**

Moderator read out: Next we are going to talk about helping you reduce your water footprint and charge a fair price. We have some further information on how SES Water are performing in this rea.

Show slide 28: PPC performance chart

Show slide 29: Help you reduce your water footprint and charge a fair price

Additional information for moderator, if required:

Smart meters allow for easy real-time monitoring of water usage within the home helping customers to understand how they are using water consumption, identify leaks, and help to improve water efficiency.

Using a smart meter also helps your water company to be able to make more informed decisions regarding the identification of peak water usage times, analysis of patterns of water consumption, and areas where water conservation is needed. In addition, it will allow SES to work closer and better with its customers to provide targeted help and advice, based on data provided by the smart meter.

In addition, SES Water has a social tariff that provides a discount to customers that have financial difficulties. There is also another tariff Water Sure that is for customers who are high users of water (medical reasons / large families) who have a meter

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 30: Smart meters

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?

- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?
- **Future customers: Do you think you would be able to afford your water bills with these proposed increases?**

Moderator read out: Finally, we're going to talk about improving the environment and having a positive impact on our local area.

Show slide 31: Improve the environment and have a positive impact on our local area

Additional information for moderator, if required:

These commitments go beyond what is mandated by law in WINEP (mentioned above), but SES Water wants to progress as they have multiple environmental and resilience benefits.

There is a long-term Government target to increase biodiversity so SES would be contributing to this

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 32: Environmental enhancements

- **Now you have seen this information, have your thoughts changed at all?**

- Do you think this is an important area for SES to focus on?
- Is this an area that warrants investment above the mandatory target?
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
 -
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?
- **Future customers: Do you think you would be able to afford your water bills with these proposed increases?**

Wrap-up (5 minutes):

Moderator read out:

Thank you for your time today, we'd just like to re-cap the key points from today's session

- Are there any key learnings SES could take out of the session today?

Introduce post-task, mention it will be sent out shortly and will need to be completed before the full incentive can be given, this will consist of a short task of around 5 minutes

7.1.6 NHH Deliberative event Discussion Guide

GROUP STRUCTURE (3 HOURS):

AREA OF DISCUSSION	TIME ALLOCATION
1. Moderator introductions	10 minutes
2. Respondents' introduction	5 minutes
3. Reactions to the recruitment process and pre-task	5 minutes
4. Introduction to SES Water	10 minutes
5. Recap on the pre-task information	20 minutes
6. Comfort break	5 minutes
7. Long term picture to 2050	15 minutes
8. Business finances and the cost-of-living crisis	10 minutes
9. Overall commitments	20 minutes
10. Deep dive into different areas	75 minutes
11. Wrap up	5 minutes

Moderator introduction (10 minutes):

- Moderator Introduce yourself
- Explain that the research is part of a study being conducted on behalf of SES Water, who are responsible for operating and maintaining the drinking water network (not the waste water system) in your region.
- The purpose of this discussion is to understand your views and perceptions on SES Water including its performance and the water bills you/your organisation pays for the services it provides in the future. The company will be using your feedback to help **develop their business plan for 2025-2030**.
- Confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible. **All suggestions are welcome.**
- The discussion will last around **3 hours, including breaks!**
- Explain the moderator's role and set out 'rules' (speak loudly/ clearly/ not all together)
- Explain audio and video recording, and members of the Impact and SES team observing (name individuals)
- Any questions?

Respondents' introduction (5 minutes)

Respondents will be split into two pre-defined groups, one led by lead moderator and other by another member of the Impact team.

- Each respondent will be asked to introduce themselves, explain their role within the business they work for and how much their business spends on water

Reactions to the recruitment process and pre-task (5 minutes):

- As a starting point, how did you find the recruitment process?
 - Was it easy to join the session?
- Did you think this was legitimate research?
 - If no, why not? What else could have been done to reassure you?
- Did you have any concerns about joining?
 - What were they?
- Were you able to complete the pre-task?
 - How did you find it?
 - Was it easy or difficult to read through?
- Is there anything in the material you read which was difficult to understand?
- What surprised you the most out of the things you have read?
- What would you most like to find out more about?
- Has any of the information you have seen changed your opinion on SES Water in any way?
 - Probe on how

Introduction to SES Water (10 minutes):

- Had you heard of SES Water before completing the pre-task?
- Is anyone aware what SES does and the role they play?

Moderator: Show stimulus slides 1, 2 and 3 to explain role of SES, ensuring to explain that SES is a water only company and that session will focus on water services.

- Has anyone ever had any contact with SES?
 - When was this?
 - What did you contact them about?
- What are your “top of mind” perceptions of SES?

- What do you think about the quality of the service you receive from SES. How would you rate the quality of service if asked on a scale of 1-5? Is it good or not?
 - Why or why not
- How do you think they compare to other water companies?
 - Has anyone been served by a different water company in the past? If so, any thoughts on what is different between them and SES? What is the same between them?

Moderator: Show stimulus slides 40, how the retail market works

- Is this clear to everyone?
- Does anyone use a water retailer?
 - What experience have you had working with them?

Recap on the pre-task information (20 minutes):

Moderator read out: Now we are going to briefly run through the information you were shown in the pre-task

Show slide 4: The role of customers, show video if needed

- Does that make sense to everyone?
- Was anyone aware of this? Have you seen a business plan from SES Water, or another water supplier before?

Show slides 5 and 6: How water companies are monitored

- Does that make sense to everyone?

Show slides 7-9: Performance levels

- Does that make sense to everyone?
- What are your initial thoughts on these industry comparisons?
 - Any surprises?
 - Any concerns – where they need to do better?
 - Has seeing these comparisons change how you feel about SES Water?
 - Anything else you would like to see performance comparisons on?

Show slide 10: Domestic customer bills

Moderator explain this is just used for demonstration purposes, as it is based on a domestic customer bill, not a business.

- Does that make sense to everyone?
- Is the distinction between clean and waste water bills clear?
- What do you think about value for money – think about how much you pay and what value you get from your water services as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not?
 - Why or why not?
- How does VFM for water services compare to waste water services? Do you think it is right that they are approximately the same?
 - Should one be higher than the other?

Additional information for moderator, if required:

If respondents are getting confused with water and waste water, some examples of services completed by waste water provider are below:

- *Operate wastewater treatment works, where water is cleaned*
- *Release treated water back into lakes, rivers and seas*
- *Monitor rainwater going into sewers, ensure sewers don't overflow and cause flooding*
- Thinking about the pre-task information on the whole, which areas do you feel matter most to you as a business?
 - Why is that?
- Imagine if you were responsible for assigning investments out towards these areas. Where do you think investment is most needed?

Comfort break (5 minutes)

Long-term picture to 2050 (15 minutes):

Moderator read out: SES Water have set out a number of ambitions, that would to have achieved by 2050. These have been set to face various challenges, which are as follows

Show slide 11 and 12:

- Were you aware of any of these challenges facing water supplies in the South East?
 - If so, which?
- Were there any that you weren't aware of?
- Are you surprised by any these challenges and their scale?

- What role do you think technology could play in the future?

Show slide 13: Long term ambitions

- What are your initial thoughts on these long-term ambitions?
- Do you feel they go far enough?
 - Why? What more could they do?
- Are there any areas that you feel are missing?
- How do you think these targets should be phased across the next 25 years?
 - Should some be done before 2050? If so, which?
 - Are some less of a priority?

Business finances and the cost-of-living crisis (10 minutes):

Moderator read out: Before we move on to further conversations about SES Water and their business plan, we just wanted to quickly touch on the cost-of-living crisis, and its impact on you and your business. The cost of living started to become a problem for greater numbers of people during the COVID-19 pandemic in 2020-2021, and has been made worse by rising costs in almost every essential sector including energy, food, petrol and other everyday essentials. Average wages are not increasing in line with the rising costs, mortgage rates have increased and many are still recovering from the impacts of the pandemic on their businesses.

- Has the cost-of-living crisis affected you and your business?
 - How?
 - When did you start to feel an impact?
 - Was this after a certain event?
 - Why do you think this is?
- Have you made any changes to the way your business is run as a result (focus on last 12 months especially)?
 - How has it affected your business making changes like this? Difficult? Easy?
- Do you worry about your future finances, say in the next 1-2 years? In what sense?
- Do you think it has impacted your ability to pay your water, or other utility bills? Or other costs?
 - How so?

Overall commitments (20 minutes)

Moderator read out: We are now planning to build on the proposed business plan summary and comparative company data that you read about in the pre-task.

Show slide 10: Customer bills

Moderator read out: Average business clean water bills for 2022-2023 for SES are likely to increase by up to 9.9% from 2025. This is not to suggest that your own company's bill will increase by this much, just that on average bills will be going up. Once actual inflation and the rewards and penalties are built-in the bill level might change a little.

- What are your initial thoughts on this?

Moderator read out: In the pre-task, we showed you a short summary of the proposed plan for SES Water. Here are the things they would like to complete between 2025 and 2030.

Show slide 14

- What are your initial thoughts on these proposals? (Note they will be covered in more detail later on)

Moderator read out: These have been split out into commitments that SES Water are proposing to do and commitments that they must make, the ones they are required by law to deliver. The proposed commitments include all of the must-do elements, with further spend allocated to make additional improvements.

Show slide 15: Intro to two plans

Show slide 16: Areas of investment

Moderator read out: The final slide you were sent in the pre-task divided these up, the commitments with a black background are those that SES must do, the ones with a white background are additional commitments SES are proposing. Here you can see the assigned bill value for each of the different commitments

- What are your initial thoughts on the split between must do and proposed?
- And the values assigned to each?

Show slide 17 and 18: Bills from 2030

Moderator read out: As we mentioned earlier, once actual inflation has been taken into account, the overall bill level may be different. Here is the difference in overall cost between the must do and preferred plan, both as a clean water bill only and a combined water and waste water bill.

- What are your initial thoughts on this?

Show slide 19: Phasing investment

Moderator read out: In addition, the way that SES deliver against the commitments could be phased in different ways, in the lead up to 2050. These are three examples, with dummy data, of ways this could happen. Please keep these in mind when answering questions in the next section.

Deep dive into different areas (75 minutes)

Moderator read out: Now we will look at each of the areas specifically. First of all, providing high quality water from sustainable sources. Before we talk about this in detail, we wanted to just share some information on WINEP. WINEP is the Water Industry National Environment Program.

Show slide 20: WINEP

- Does that all make sense for customers?

Moderator read out: Let us just remind you how SES are doing in terms of Taste, smell and appearance of water.

Show slide 8: Taste, smell and appearance of water

Show slide 21: Provide you with high quality water from sustainable sources

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?
- **Specifically looking at the commitment around lead pipes, how important is it for SES Water to deliver against this target?**

Show slide 22: Lead replacement

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?

- Are some less of a priority?
- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Next we are going to talk about delivering a resilient water supply from source to tap. Let us just remind you how SES are doing in water supply interruptions and leakage.

Show slide 7: Water supply interruptions and slide 9: Reducing leaks

Show slide 23: Deliver a resilient water supply from source to tap

Additional information for moderator, if required:

- *Resilience of supplies*
 - *Schemes driven by legal SEMD (security) requirements – must do (£1.5m)*
 - *Schemes that are aiming to protect sites from climate change and power outage risks – this is a choice (£5m)*
- *Supply interruptions – long term target is no interruptions by 2050*
 - *Already among best in the industry and outperforming our target. Plan is to at least maintain that level of service – no extra investment required*
 - *We will get indirect benefits from our investment in leakage that will contribute to minimising supply interruptions*
- *Leakage – long-term target is to achieve 50% reduction in leakage by 2040 ahead of the Government’s target*
 - *Investment to reduce leakage through smart technology, finding and fixing leaks more quickly, replacing old water mains and pressure management. The faster roll out of smart meters will help reduce leakage quicker*
 - *Additional suggestion for leakage to be reduced further by pressure management*
- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

- First looking at the commitment around supply interruption, do you think this is an acceptable target?

Show slide 24: Supply interruptions

- **Moving on to, the commitment of protecting the water treatment works, how important is it for SES Water to deliver against the second target?**

Show slide 25: Resilience

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- **Next, looking at the second commitment, leakage reduction, how important is it for SES Water to deliver against the second target?**

Show slide 26 and 27: Leakage reduction

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?
- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator allow a 10-minute comfort break after the second set of commitments.

Moderator read out: Next we are going to talk about helping you reduce your water footprint and charge a fair price. We have some further information on how SES Water are performing in this rea.

Show slide 28: PPC performance chart

Show slide 29: Help you reduce your water footprint and charge a fair price

Additional information for moderator, if required:

Smart meters allow for easy real-time monitoring of water usage within the home/business helping customers to understand how they are using water consumption, identify leaks, and help to improve water efficiency.

Using a smart meter also helps your water company to be able to make more informed decisions regarding the identification of peak water usage times, analysis of patterns of water consumption, and areas where water conservation is needed. In addition, it will allow SES to work closer and better with its customers to provide targeted help and advice, based on data provided by the smart meter.

In addition, SES Water has a social tariff that provides a discount to customers that have financial difficulties. There is also another tariff Water Sure that is for customers who are high users of water (medical reasons / large families) who have a meter

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 30: Smart meters

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?

- Should some be achieved before 2030? If so, which?
- Are some less of a priority?
- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Finally, we're going to talk about improving the environment and having a positive impact on our local area.

Show slide 31: Improve the environment and have a positive impact on our local area

Additional information for moderator, if required:

These commitments go beyond what is mandated by law in WINEP (mentioned above), but SES Water wants to progress as they have multiple environmental and resilience benefits.

There is a long-term Government target to increase biodiversity so SES would be contributing to this

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 32: Environmental enhancements

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Wrap-up (5 minutes):

Moderator read out:

Thank you for your time today, we'd just like to re-cap the key points from today's session

- Are there any key learnings SES could take out of the session today?

Introduce post-task, mention it will be sent out shortly, this will consist of a short task of around 5 minutes

Thank and close.

7.1.7 HH in vulnerable circumstances Interview Guide

INTERVIEW STRUCTURE (45-60 MINUTES):

AREA OF DISCUSSION	TIME ALLOCATION
1. Introductions	2 minutes
2. Reactions to the recruitment process and pre-task	2 minutes
3. Introduction to SES Water	5 minutes
4. Recap on the pre-task information	5 minutes
5. Explore service needs and experiences of Priority Services and Social Tariffs	5 minutes
6. Household finances and the cost-of-living crisis	5 minutes
7. Focus on areas of support offered in upcoming business plan	5 minutes
8. Deep dive into different areas	15 minutes
9. Wrap up	1 minute

Moderator introduction (2 minutes):

- Moderator Introduce yourself
- Explain that the research is part of a study being conducted on behalf of SES Water, who are responsible for operating and maintaining the drinking water network (not the waste water system) in your region.
- The purpose of this discussion is to understand your views and perceptions on SES Water including its performance and the water bills you/your organisation pays for the services it provides in the future. The company will be using your feedback to help **develop their business plan for 2025-2030**.
- Confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible. **All suggestions are welcome.**
- The interview will last around **45 minutes to an hour!**
- Explain the moderator's role and set out 'rules'
- Explain audio and video recording
- Any questions?

Respondents' introduction (2 minutes)

- Ask respondent to introduce themselves

Reactions to the recruitment process and pre-task (2 minutes):

- As a starting point, how did you find the recruitment process?

- Was it easy to join the session?
- Did you think this was legitimate research?
 - If no, why not? What else could have been done to reassure you?
- Did you have any concerns about joining?
 - What were they?
- Were you able to complete the pre-task?
 - How did you find it?
 - Was it easy or difficult to read through?
- Is there anything in the material you read which was difficult to understand?
- What surprised you the most out of the things you have read?
- What would you most like to find out more about?
- Has any of the information you have seen changed your opinion on SES Water in any way?
 - Probe on how

Introduction to SES Water (5 minutes):

- Had you heard of SES Water before completing the pre-task?
- Were you aware of what SES does and the role they play?

Moderator: Show stimulus slides 1, 2 and 3 to explain role of SES, ensuring to explain that SES is a water only company and that session will focus on water services.

- Have you ever had any contact with SES?
 - When was this?
 - What did you contact them about?
- What are your “top of mind” perceptions of SES?
- What do you think about the quality of the service you receive from SES. How would you rate the quality of service if asked on a scale of 1-5? Is it good or not?
 - Why or why not
- How do you think they compare to other water companies?
 - Have you been served by a different water company in the past? If so, any thoughts on what is different between them and SES? What is the same between them?

Recap on the pre-task information (5 minutes):

Moderator read out: Now we are going to briefly run through the information you were shown in the pre-task

Show slide 4: The role of customers, show video if needed

- Does that make sense to everyone?
- Were you aware of this? Have you seen a business plan from SES Water, or another water supplier before?

Show slides 5 and 6: How water companies are monitored

- Does that make sense to everyone?

Show slide 10: Customer bills

- Does that make sense to everyone?
- Is the distinction between clean and waste water bills clear?
- What do you think about value for money – think about how much you pay and what value you get from your water services as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not?
 - Why or why not?
- How does VFM for water services compare to waste water services? Do you think it is right that they are approximately the same?
 - Should one be higher than the other?

Additional information for moderator, if required:

If respondents are getting confused with water and waste water, some examples of services completed by waste water provider are below:

- *Operate wastewater treatment works, where water is cleaned*
- *Release treated water back into lakes, rivers and seas*
- *Monitor rainwater going into sewers, ensure sewers don't overflow and cause flooding*
- Thinking about the pre-task information on the whole, which areas do you feel matter most to you?
 - Why is that?
- Imagine if you were responsible for assigning investments out towards these areas. Where do you think investment is most needed?

Explore service needs and experiences of Priority Services and Social Tariffs (5 minutes):

Moderator read out: SES Water have a number of services specifically aimed at those in most need of additional support.

Show slide 37:

- Thinking about the pre-task information concerning what SES Water provide as part of their Priority Services and Social Tariffs, did this information make sense?

- Was there anything that wasn't clear?
- Were you aware of these support measures prior to reading the pre-task?
 - Have you spoken to SES Water regarding these services at all?
 - If no, why not?
- What sort of support would you like to see given by your water supplier?
 - How should this be delivered?
 - Is this support financial, or health related?

Household finances and the cost-of-living crisis (5 minutes):

Moderator read out: Before we move on to further conversations about SES Water and their business plan, we just wanted to quickly touch on the cost-of-living crisis, and its impact on you. The cost of living started to become a problem for greater numbers of people during the COVID-19 pandemic in 2020-2021, and has been made worse by rising costs in almost every essential sector including energy, food, petrol and other everyday essentials. Average wages are not increasing in line with the rising costs, mortgage rates have increased and many are still recovering from the impacts of the pandemic on their businesses.

- Has the cost-of-living crisis affected you?
 - How?
 - When did you start to feel an impact?
 - Was this after a certain event?
 - Why do you think this is?
- Have you made any changes to the way your household/business is run as a result (focus on last 12 months especially)?
 - Have you stopped doing anything because of worrying about making ends meet?
 - Are the changes enough?
 - How has it affected your household making changes like this? Difficult? Easy?
- Do you worry about your future finances, say in the next 1-2 years? In what sense?
- Do you think it has impacted your ability to pay your water, or other utility bills?
 - How so?
- Do you plan to make any changes in future to reduce your spending?
 - What do you think these will be?

Focus on areas of support offered in upcoming business plan (5 minutes)

Moderator: Show slides 38 and 39 and read through different areas one by one

- What is your thought on what is offered?
 - Do you think the eligibility criteria is correct?
 - How would you change it?
 - How long do you think a customer should remain on the scheme before their eligibility audited?
 - It is currently 2 years, does that sound appropriate?
 - Are there any circumstances where a customer would be on them for life?
 - (e.g., in receipt of pension credit)
- Do you believe these proposals would help you or your family?
- Is there anything missing that you would expect to see?
- In terms of priority services and social tariffs how would SES rank in comparison to other companies? Think about support given for gas and electricity supply, for example.

Preferred plan (15 minutes)

Moderator read out: We are now planning to build on the proposed business plan summary and comparative company data that you read about in the pre-task.

Show slide 10: Customer bills

Moderator read out: Average household clean water bills for 2022-2023 for SES are likely to increase by up to £19 from 2025. This is not to suggest that your own personal bill will increase by this much, just that on average bills will be going up. Once actual inflation and the rewards and penalties are built-in the bill level might change a little.

- What are your initial thoughts on this?

Moderator read out: In the pre-task, we showed you a short summary of the proposed plan for SES Water. Here are the things they would like to complete between 2025 and 2030.

Show slide 12

- What are your initial thoughts on these proposals? (Note they will be covered in more detail later on)

Moderator read out: These have been split out into commitments that SES Water are proposing to do and commitments that they must make, the ones they are required by law to deliver. The proposed commitments include all of the must-do elements, with further spend allocated to make additional improvements.

Show slide 19: Intro to two plans

Show slide 20: Areas of investment

Moderator read out: The final slide you were sent in the pre-task divided these up, the commitments with a black background are those that SES must do, the ones with a white background are additional commitments SES are proposing. Here you can see the assigned bill value for each of the different commitments

- What are your initial thoughts on the split between must do and proposed?
- And the values assigned to each?

Show slide 21 and 22: Bills from 2030

Moderator read out: As we mentioned earlier, once actual inflation has been taken into account, the overall bill level may be different. Here is the difference in overall cost between the must do and preferred plan, both as a clean water bill only and a combined water and waste water bill.

- What are your initial thoughts on this?

Moderator read out: Now we will look at each of the areas specifically. First of all, providing high quality water from sustainable sources. Before we talk about this in detail, we wanted to just share some information on WINEP. WINEP is the Water Industry National Environment Program.

Show slide 24: WINEP

- Does that all make sense for customers?

Show slide 25: Provide you with high quality water from sustainable sources

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?
- **Specifically looking at the commitment around lead pipes, how important is it for SES Water to deliver against this target?**

Show slide 26: Lead replacement

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?

- Are they fairly costed?
- Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Next we are going to talk about delivering a resilient water supply from source to tap.

Show slide 27: Deliver a resilient water supply from source to tap

Additional information for moderator, if required:

- *Resilience of supplies*
 - *Schemes driven by legal SEMD (security) requirements – must do (£1.5m)*
 - *Schemes that are aiming to protect sites from climate change and power outage risks – this is a choice (£5m)*
- *Leakage – long-term target is to achieve 50% reduction in leakage by 2040 ahead of the Government’s target*
 - *Investment to reduce leakage through smart technology, finding and fixing leaks more quickly, replacing old water mains and pressure management. The faster roll out of smart meters will help reduce leakage quicker*

- *Additional suggestion for leakage to be reduced further by pressure management*
- *Supply interruptions – long term target is no interruptions by 2050*
 - *Already among best in the industry and outperforming our target. Plan is to at least maintain that level of service – no extra investment required*
 - *We will get indirect benefits from our investment in leakage that will contribute to minimising supply interruptions*
- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?
- First looking at the commitment around supply interruption, do you think this is an acceptable target?

Show slide 28: Supply interruptions

- **Moving on to, the commitment of protecting the water treatment works, how important is it for SES Water to deliver against the second target?**

Show slide 29: Resilience

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- **Next, looking at the second commitment, leakage reduction, how important is it for SES Water to deliver against the second target?**

Show slide 30 and 31: Leakage reduction

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?

- Should some be achieved before 2030? If so, which?
- Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator allow a 10-minute comfort break after the second set of commitments.

Moderator read out: Next we are going to talk about helping you reduce your water footprint and charge a fair price.

Show slide 33: Help you reduce your water footprint and charge a fair price

Additional information for moderator, if required:

Smart meters allow for easy real-time monitoring of water usage within the home helping customers to understand how they are using water consumption, identify leaks, and help to improve water efficiency.

Using a smart meter also helps your water company to be able to make more informed decisions regarding the identification of peak water usage times, analysis of patterns of water consumption, and areas where water conservation is needed. In addition, it will allow SES to work closer and better with its customers to provide targeted help and advice, based on data provided by the smart meter.

In addition, SES Water has a social tariff that provides a discount to customers that have financial difficulties. There is also another tariff Water Sure that is for customers who are high users of water (medical reasons / large families) who have a meter

- What are your thoughts on these targets?

- Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 34: Smart meters

SES customers currently use on average 150 litres per person per day, gov target is 110 litres by 2050 and for businesses to reduce by 15%, smart meters allow us to provide more info on how much water is being used and where and can greatly help more targeted water efficiency support.

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Finally, we're going to talk about improving the environment and having a positive impact on our local area.

Show slide 35: Improve the environment and have a positive impact on our local area

Additional information for moderator, if required:

These commitments go beyond what is mandated by law in WINEP (mentioned above), but SES Water wants to progress as they have multiple environmental and resilience benefits.

There is a long-term Government target to increase biodiversity so SES would be contributing to this

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 36: Environmental enhancements

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
 -
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

Moderator: probe around the idea of intergenerational fairness, i.e., those in the future having equal and fair access to resources like previous generations have? And should customers be charged for it now, if it is customers of the future that are likely to see the benefits?

- Thinking specifically as a customer (i.e., the person that pays the water bill), which do you think are most important?
- Would this be different for a consumer (i.e., a user of the services, but not the bill payer)?
- What about a general citizen (i.e., someone thinking about the wider needs of society and the environment over the long term)?
- Would you be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Wrap-up (1 minute):

Moderator read out:

Thank you for your time today, we'd just like to re-cap the key points from today's session

- Are there any key learnings SES could take out of the session today?

Introduce post-task, mention it will be sent out shortly and will consist of a short task of around 5 minutes

Thank and close.

7.1.8 Large NHH interview guide

INTERVIEW STRUCTURE (45-60 MINUTES):

AREA OF DISCUSSION	TIME ALLOCATION
1. Introductions	2 minutes
2. Reactions to the recruitment process and pre-task	2 minutes
3. Introduction to SES Water	5 minutes
4. Recap on the pre-task information	5 minutes
5. Long term picture to 2050	5 minutes
6. Overall commitments	10 minutes
7. Deep dive into different areas	15 minutes
8. Wrap up	1 minute

Moderator introduction (2 minutes):

- Moderator Introduce yourself
- Explain that the research is part of a study being conducted on behalf of SES Water, who are responsible for operating and maintaining the drinking water network (not the waste water system) in your region.
- The purpose of this discussion is to understand your views and perceptions on SES Water including its performance and the water bills you/your organisation pays for the services it provides in the future. The company will be using your feedback to help **develop their business plan for 2025-2030**.
- Confidentiality is guaranteed, no right/wrong answers, interested in everybody's opinions, in as much detail as possible. **All suggestions are welcome.**
- The interview will last around **45 minutes to an hour!**
- Explain the moderator's role and set out 'rules'
- Explain audio and video recording
- Any questions?

Respondents' introduction (2 minutes)

- Each respondent will be asked to introduce themselves, explain their role within the business they work for and how much their business spends on water

Reactions to the recruitment process and pre-task (2 minutes):

- As a starting point, how did you find the recruitment process?
 - Was it easy to join the session?
- Did you think this was legitimate research?
 - If no, why not? What else could have been done to reassure you?
- Did you have any concerns about joining?
 - What were they?
- Were you able to complete the pre-task?
 - How did you find it?
 - Was it easy or difficult to read through?
- Is there anything in the material you read which was difficult to understand?
- What surprised you the most out of the things you have read?
- What would you most like to find out more about?
- Has any of the information you have seen changed your opinion on SES Water in any way?
 - Probe on how

- Do you recall the question asking about which of the following is the most important for the day-to-day operations of the business? Which would you say were the most important?
 - A reliable water supply service – not prone to interruptions
 - Consistent water pressure
 - Reliable and consistent water supply quality (taste, smell, appearance of water)
 - Responsive customer service when there is a problem
 - Accurate bills
 - Reliable removal and treatment of water used at the business premises
 - Reliable removal of rainwater from the site

Introduction to SES Water (5 minutes):

- Had you heard of SES Water before completing the pre-task?
- Were you aware of what SES does and the role they play?

Moderator: Show stimulus slides 1, 2 and 3 to explain role of SES, ensuring to explain that SES is a water only company and that session will focus on water services.

- Have you ever had any contact with SES?
 - When was this?

- What did you contact them about?
- What are your “top of mind” perceptions of SES?
- What do you think about the quality of the service you receive from SES. How would you rate the quality of service if asked on a scale of 1-5? Is it good or not?
 - Why or why not
- How do you think they compare to other water companies?

Moderator: Show stimulus slides 40, how the retail market works

- Is this clear to everyone?
- Does anyone use a water retailer?
 - What experience have you had working with them?

Recap on the pre-task information (5 minutes):

Moderator read out: Now we are going to briefly run through the information you were shown in the pre-task

Show slide 4: The role of customers, show video if needed

- Does that make sense to everyone?
- Were you aware of this? Have you seen a business plan from SES Water, or another water supplier before?

Show slides 5 and 6: How water companies are monitored

- Does that make sense to everyone?

Show slides 7-9: Performance levels

- Does that make sense to everyone?
- What are your initial thoughts on these industry comparisons?
 - Any surprises?
 - Any concerns – where they need to do better?
 - Has seeing these comparisons change how you feel about SES Water?
 - Anything else you would like to see performance comparisons on?

Show slide 10: Domestic customer bills

Moderator explain this is just used for demonstration purposes, as it is based on a domestic customer bill, not a business.

- Does that make sense to everyone?
- Is the distinction between clean and waste water bills clear?
- What do you think about value for money – think about how much you pay and what value you get from your water services as a customer? How would you rate value for money if asked on a scale of 1-5? Do they offer good value for money or not?
 - Why or why not?
- How does VFM for water services compare to waste water services? Do you think it is right that they are approximately the same?
 - Should one be higher than the other?

Additional information for moderator, if required:

If respondents are getting confused with water and waste water, some examples of services completed by waste water provider are below:

- *Operate wastewater treatment works, where water is cleaned*
- *Release treated water back into lakes, rivers and seas*
- *Monitor rainwater going into sewers, ensure sewers don't overflow and cause flooding*
- Thinking about the pre-task information on the whole, which areas do you feel matter most to you?
 - Why is that?
- Imagine if you were responsible for assigning investments out towards these areas. Where do you think investment is most needed?

Long-term picture to 2050 (5 minutes):

Moderator read out: SES Water have set out a number of ambitions, that would to have achieved by 2050. These have been set to face various challenges, which are as follows

Show slide 11 and 12:

- Were you aware of any of these challenges facing water supplies in the South East?
 - If so, which?
- Were there any that you weren't aware of?
- Are you surprised by any these challenges and their scale?

- What role do you think technology could play in the future?

Show slide 13: Long term ambitions

- What are your initial thoughts on these long-term ambitions?
- Do you feel they go far enough?
 - Why? What more could they do?
- Are there any areas that you feel are missing?
- How do you think these targets should be phased across the next 25 years?
 - Should some be done before 2050? If so, which?
 - Are some less of a priority?

Overall commitments (10 minutes)

Moderator read out: We are now planning to build on the proposed business plan summary and comparative company data that you read about in the pre-task.

Show slide 10: Customer bills

Moderator read out: Average business clean water bills for 2022-2023 for SES are likely to increase by up to 9.9% from 2025. This is not to suggest that your own company's bill will increase by this much, just that on average bills will be going up. Once actual inflation and the rewards and penalties are built-in the bill level might change a little.

- What are your initial thoughts on this?

Moderator read out: In the pre-task, we showed you a short summary of the proposed plan for SES Water. Here are the things they would like to complete between 2025 and 2030.

Show slide 14

- What are your initial thoughts on these proposals? (Note they will be covered in more detail later on)

Moderator read out: These have been split out into commitments that SES Water are proposing to do and commitments that they must make, the ones they are required by law to deliver. The proposed commitments include all of the must-do elements, with further spend allocated to make additional improvements.

Show slide 15: Intro to two plans

Show slide 16: Areas of investment

Moderator read out: The final slide you were sent in the pre-task divided these up, the commitments with a black background are those that SES must do, the ones with a white background are additional commitments SES are proposing. Here you can see the assigned bill value for each of the different commitments

- What are your initial thoughts on the split between must do and proposed?
- And the values assigned to each?

Show slide 17 and 18: Bills from 2030

Moderator read out: As we mentioned earlier, once actual inflation has been taken into account, the overall bill level may be different. Here is the difference in overall cost between the must do and preferred plan, both as a clean water bill only and a combined water and waste water bill.

- What are your initial thoughts on this?

Show slide 19: Phasing investment

Moderator read out: In addition, the way that SES deliver against the commitments could be phased in different ways, in the lead up to 2050. These are three examples, with dummy data, of ways this could happen. Please keep these in mind when answering questions in the next section.

Deep dive into different areas (15 minutes)

MODERATOR: ENSURE FOCUS OF DISCUSSION IS AROUND THE AREAS THAT ARE MOST IMPORTANT TO EACH BUSINESS, INFORMATION COMING FROM PRE-TASK AND QUESTION AT THE END OF THE RE-CAP SECTION

Moderator read out: Now we will look at each of the areas specifically. First of all, providing high quality water from sustainable sources. Before we talk about this in detail, we wanted to just share some information on WINEP. WINEP is the Water Industry National Environment Program.

Show slide 20: WINEP

- Does that all make sense for customers?

Moderator read out: Let us just remind you how SES are doing in terms of Taste, smell and appearance of water.

Show slide 8: Taste, smell and appearance of water

Show slide 21: Provide you with high quality water from sustainable sources

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?

- How do you feel SES Water could meet these targets?
- **Specifically looking at the commitment around lead pipes, how important is it for SES Water to deliver against this target?**

Show slide 22: Lead replacement

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?
- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Next we are going to talk about delivering a resilient water supply from source to tap. Let us just remind you how SES are doing in water supply interruptions and leakage.

Show slide 7: Water supply interruptions and slide 9: Reducing leaks

Show slide 23: Deliver a resilient water supply from source to tap

Additional information for moderator, if required:

- *Resilience of supplies*
 - *Schemes driven by legal SEMD (security) requirements – must do (£1.5m)*

- *Schemes that are aiming to protect sites from climate change and power outage risks – this is a choice (£5m)*
- *Supply interruptions – long term target is no interruptions by 2050*
 - *Already among best in the industry and outperforming our target. Plan is to at least maintain that level of service – no extra investment required*
 - *We will get indirect benefits from our investment in leakage that will contribute to minimising supply interruptions*
- *Leakage – long-term target is to achieve 50% reduction in leakage by 2040 ahead of the Government’s target*
 - *Investment to reduce leakage through smart technology, finding and fixing leaks more quickly, replacing old water mains and pressure management. The faster roll out of smart meters will help reduce leakage quicker*
 - *Additional suggestion for leakage to be reduced further by pressure management*
- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?
- First looking at the commitment around supply interruption, do you think this is an acceptable target?

Show slide 24: Supply interruptions

- **Moving on to, the commitment of protecting the water treatment works, how important is it for SES Water to deliver against the second target?**

Show slide 25: Resilience

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- **Next, looking at the second commitment, leakage reduction, how important is it for SES Water to deliver against the second target?**

Show slide 26 and 27: Leakage reduction

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?
- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Next we are going to talk about helping you reduce your water footprint and charge a fair price. We have some further information on how SES Water are performing in this rea.

Show slide 28: PPC performance chart

Show slide 29: Help you reduce your water footprint and charge a fair price

Additional information for moderator, if required:

Smart meters allow for easy real-time monitoring of water usage within the home/business helping customers to understand how they are using water consumption, identify leaks, and help to improve water efficiency.

Using a smart meter also helps your water company to be able to make more informed decisions regarding the identification of peak water usage times, analysis of patterns of water consumption, and areas where water conservation is needed. In addition, it will allow SES to work closer and better with its customers to provide targeted help and advice, based on data provided by the smart meter.

In addition, SES Water has a social tariff that provides a discount to customers that have financial difficulties. There is also another tariff Water Sure that is for customers who are high users of water (medical reasons / large families) who have a meter

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?
- How do you feel SES Water could meet these targets?

Show slide 30: Smart meters

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**
- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?
- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?
- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Moderator read out: Finally, we're going to talk about improving the environment and having a positive impact on our local area.

Show slide 31: Improve the environment and have a positive impact on our local area

Additional information for moderator, if required:

These commitments go beyond what is mandated by law in WINEP (mentioned above), but SES Water wants to progress as they have multiple environmental and resilience benefits.

There is a long-term Government target to increase biodiversity so SES would be contributing to this

- What are your thoughts on these targets?
 - Do they go far enough? Would you expect to see them go further?

- How do you feel SES Water could meet these targets?

Show slide 32: Environmental enhancements

- **Now you have seen this information, have your thoughts changed at all?**
 - **Do you think this is an important area for SES to focus on?**
- **Is this an area that warrants investment above the mandatory target?**

- What are your thoughts on the bill impacts for each of these?
 - Are they fairly costed?
 - Would you expect them to cost more, less?

- How do you think these targets should be phased across the next 5 years?
 - Should some be achieved before 2030? If so, which?
 - Are some less of a priority?

- Would you and your business be able to afford the additional bill impact?
- Are these proposals for bill increases acceptable?

Wrap-up (1 minute):

Moderator read out:

Thank you for your time today, we'd just like to re-cap the key points from today's session

- Are there any key learnings SES could take out of the session today?

Introduce post-task, mention it will be sent out shortly and will consist of a short task of around 5 minutes

7.1.9 NHH Deliberative event stimulus

1. Water companies in England and Wales

Water companies are regional: people have to receive water services from the company that covers where they live

- There are 11 water companies that provide **both water and sewerage services**
- There are also 5 companies that provide water services only – **SES Water is a water only company**
- Some households have two separate suppliers:
- e.g. people in SES Water's supply area receive **water services from SES Water** and **sewerage services from Thames Water or Southern Water**



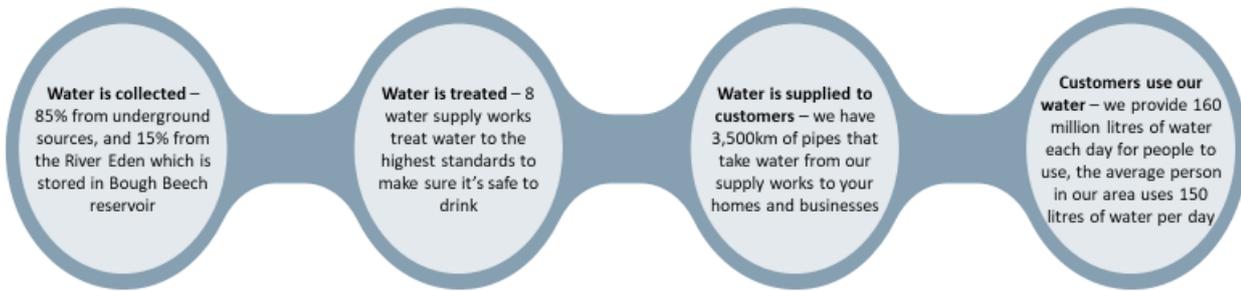
2. SES Water's supply area

- SES supply drinking water to 745,000 people and 8,000 businesses in parts of Surrey, West Sussex, Kent and South London
- Thames Water supply the wastewater services to the majority of our customers
- Southern Water supply the wastewater services to customers in the Kent area



3. What SES Water do

Water supply (SES Water):



Wastewater service (Thames Water)

- **Wastewater is removed** – wastewater is taken away from homes through a network of sewers and pumping stations
 - **Wastewater is treated** – wastewater treatment works clean the wastewater so that it can be safely returned to the environment
- **Customers are billed** – we bill customers for our water supply service and provide the bills on behalf of Thames Water for their wastewater service (if you are a Southern Water wastewater customer you will receive two bills)

4. The role of customers in a price review process



Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As customers are not able to choose their water company, water companies must give them a say about what they want from their services and the price they pay. Talking to customers also helps water companies prioritise what to do first or what to do most of – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.

The business plan and prices are then finalised by Ofwat in a process known as the **Price Review**. There is more information about this here: 'All about the price review'. Available at: <https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are 'acceptable' to you and whether you can afford the proposed bills from 2025-2030. Companies also have to show to Ofwat that their plans reflect what their customers want – that means refining the plans based on what customers tell them.

5. How water companies are monitored

Water companies are currently part way through their five-year business plan for 2020 to 2025. They have service level targets, called ‘performance commitments’, in every five-year business plan. These targets are based on what customers have previously told companies they would like them to do, and on Ofwat’s assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

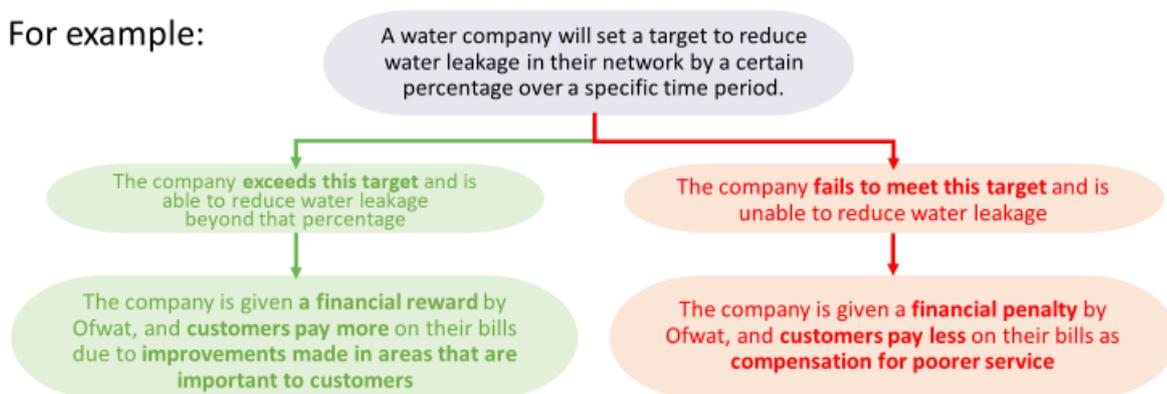
Water companies have to provide reliable services, and plan for their services to be resilient to changing weather patterns and demand from consumers. Companies can miss or exceed performance commitment targets for a number of reasons. For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets.



6. How water companies are monitored cont...

As part of their responsibility to provide clean and safe water to households and businesses, regulators set targets and performance standards for UK water companies. Outcome Delivery Incentives (ODIs) are a part of this framework and act as a system of financial rewards and penalties that are placed to encourage water companies to perform beyond their committed levels of service in order to benefit customers, the environment, and improve overall service.

For example:



Last year SES Water **passed 17** and **failed 8** performance commitment targets, costing them a penalty of £0.3m (equating to a £1.30 decrease on the average household bill)

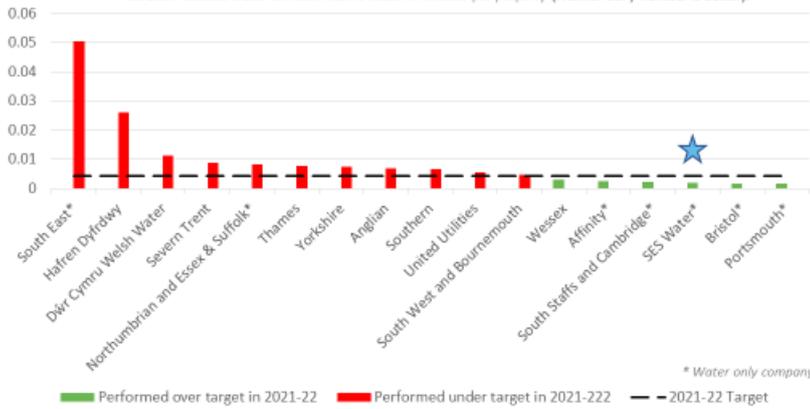
7. Water supply interruptions

Water supply interruptions, without warning, for longer than 3 hours.

If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Water companies measured on the length of time properties are without water

Duration without water for more than 3 hours in minutes per property (A lower bar / number is better).



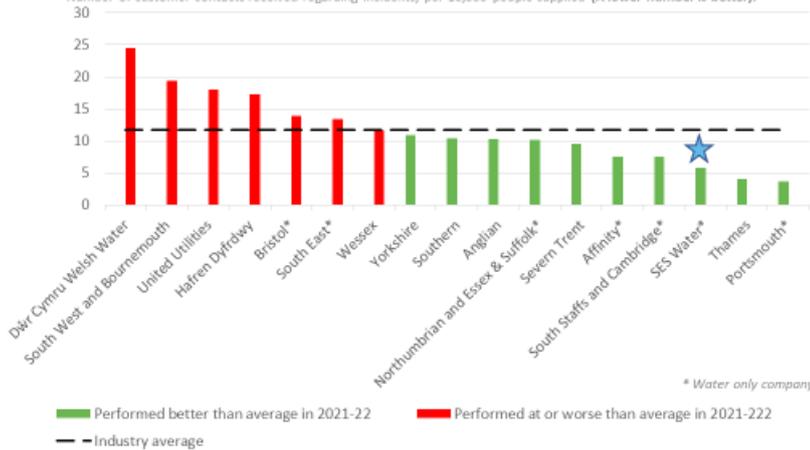
Company performance against targets (a lower percentage is better)	
Water and Sewage company	Performance against target
Portsmouth*	-62%
Bristol*	-59%
SES Water*	-52%
South Staffs and Cambridge*	-47%
Affinity*	-39%
Wessex	-32%
South West	+11%
United Utilities	+30%
Southern	+53%
Anglian	+60%
Yorkshire	+73%
Thames	+80%
Northumbrian and Essex & Suffolk	+92%
Severn Trent	+106%
Dŵr Cymru Welsh Water	+164%
Hafren Dyfrdwy	+511%
South East*	+1083%

8. Taste, smell and appearance of water

Tap water may taste/smell/look different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Water companies measured on number of customer contacts regarding the taste, smell and appearance of tap water

Number of customer contacts received regarding incidents, per 10,000 people supplied (A lower number is better).

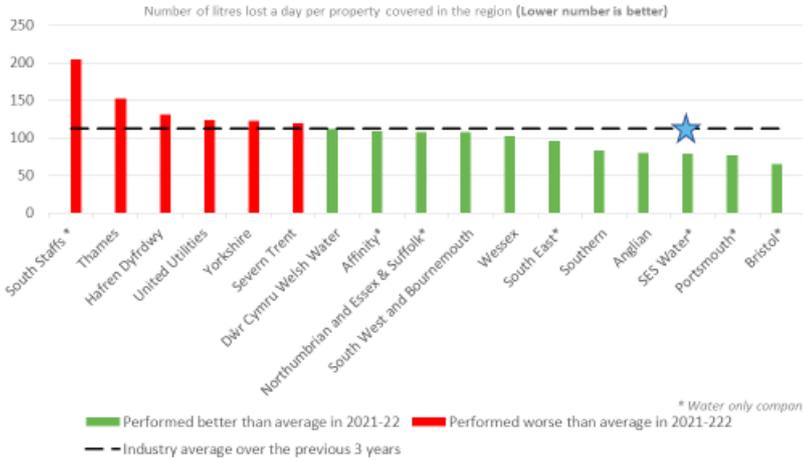


Company performance against industry average (A lower percentage is better)	
Water and Sewage company	Performance against industry average
Portsmouth*	-68%
Thames	-66%
SES Water*	-50%
Affinity*	-35%
South Staffs and Cambridge*	-35%
Severn Trent	-19%
Northumbrian and Essex & Suffolk*	-14%
Anglian	-12%
Southern	-11%
Yorkshire	-7%
Wessex	+/-0%
South East*	+15%
Bristol*	+19%
Hafren Dyfrdwy	+48%
United Utilities	+54%
South West and Bournemouth	+66%
Dŵr Cymru Welsh Water	+109%

9. Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

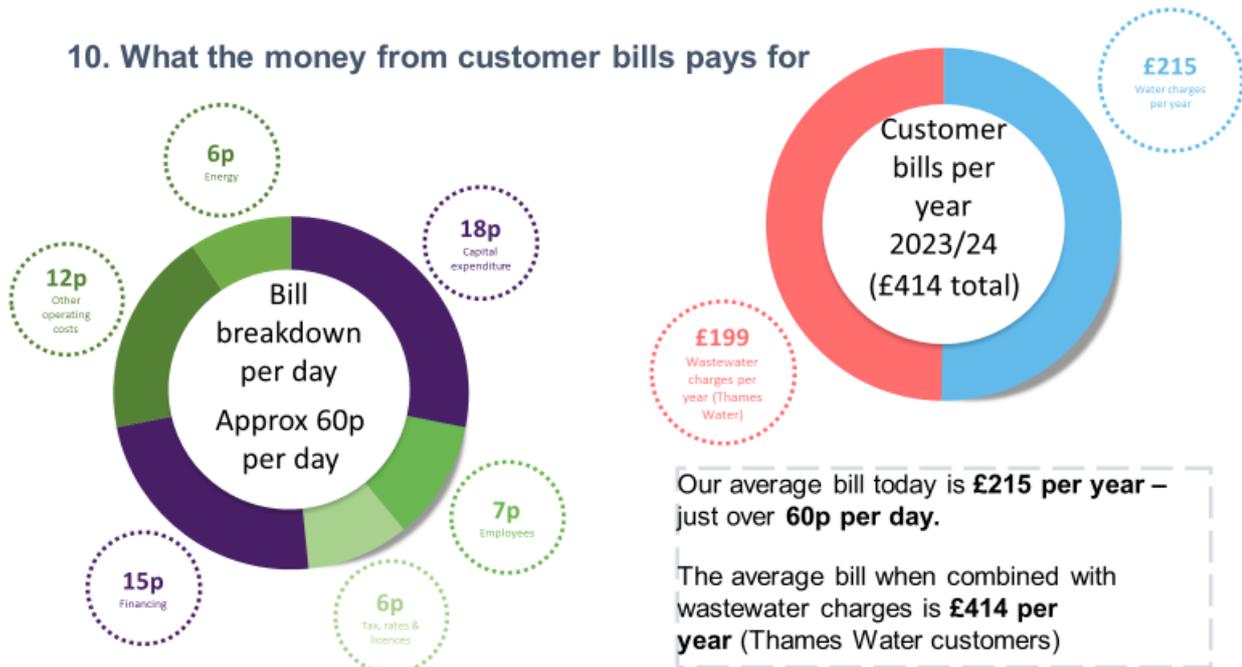
Water companies measured on the amount of water lost due to leaks from water mains and pipes.



Company performance against the industry average (a lower percentage is better)

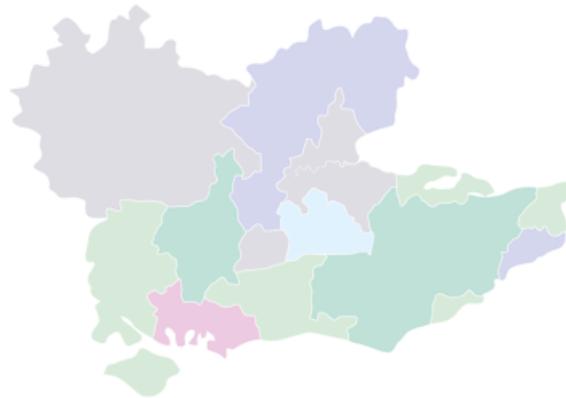
Water and Sewage company	Performance against 3 year average
Bristol*	-42%
Portsmouth*	-32%
SES Water*	-30%
Anglian	-29%
Southern	-27%
South East*	-15%
Wessex	-9%
Northumbrian and Essex & Suffolk*	-4%
South West and Bournemouth	-4%
Affinity*	-4%
Dŵr Cymru Welsh Water	-1%
Severn Trent	+6%
Yorkshire	+9%
United Utilities	+10%
Hafren Dyfrdwy	+16%
Thames	+35%
South Staffs & Cambridge*	+91%

10. What the money from customer bills pays for



11. Company challenges

- South East England is classified by Government as being in serious water stress
- Climate change and a growing population = future shortfall in water supplies
- SES Water and its neighbouring companies rely on rivers and chalk streams to provide your water which are sensitive habitats which need to be protected
- Water companies will have to reduce how much water they take from some of their existing sources
- These sources will need to be replaced by
 - reducing leakage and water consumption
 - companies building new sources of water such as reservoirs and desalination plants
 - transferring more water between companies
- SES Water's **Water Resources Management Plan (WRMP)** sets out how the company will secure its water resources in the future and meet its legal obligations.



Potential regional shortfall in water – 1 billion litres per day by 2035

12. Company challenges

Climate change	New statutory requirements	Population growth	Economic factors
<ul style="list-style-type: none"> • Climate change means we could see hotter, drier summers and wetter winters • This could result in less water in the environment in summer, but more pressure on the water system in the winter. • There could be between 3 and 7.5 million litres less water available from our existing sources by 2050 	<ul style="list-style-type: none"> • Improving the quality of the water sources we use • Protecting rivers and chalk streams – we may need to reduce how much water we take from our existing sources by up to 30 million litres per day • Reducing leakage by 50% by 2050 • Reducing household consumption to 110 litres per person per day by 2050 • Reducing non-household consumption by 15% by 2050 	<ul style="list-style-type: none"> • As the population in the area increases, so does the demand for water • Current forecasts predict population growth of between 5 and 15% by 2050, resulting in between 2.6 and 9 million litres of water extra being needed each day 	<ul style="list-style-type: none"> • Cost of living crisis is making some people's bills unaffordable • Investment to meet new statutory requirements and further improve service will cost more • Rising inflation will increase bills further

There are also opportunities.....

- Advances in technology is changing how SES Water deliver their service – fully smart pipe network
- Smart meters will help detect more leaks and help customers manage their own consumption
- Other technological advances could help reduce leaks and supply interruptions further, reduce carbon emissions and help protect water quality

13. 2050 ambitions

Provide you with high quality water from sustainable sources

- To have always provided you with high-quality water that meets the highest standards
- To only use sources where we can take water without harming the environment

Deliver a resilient water supply from source to tap

- For our water supplies to be resilient to climate change – including severe droughts
- For no-one to have their water supply interrupted for more than 3 hours
- For less than 5% of water we produce to be leaked from our pipes and yours

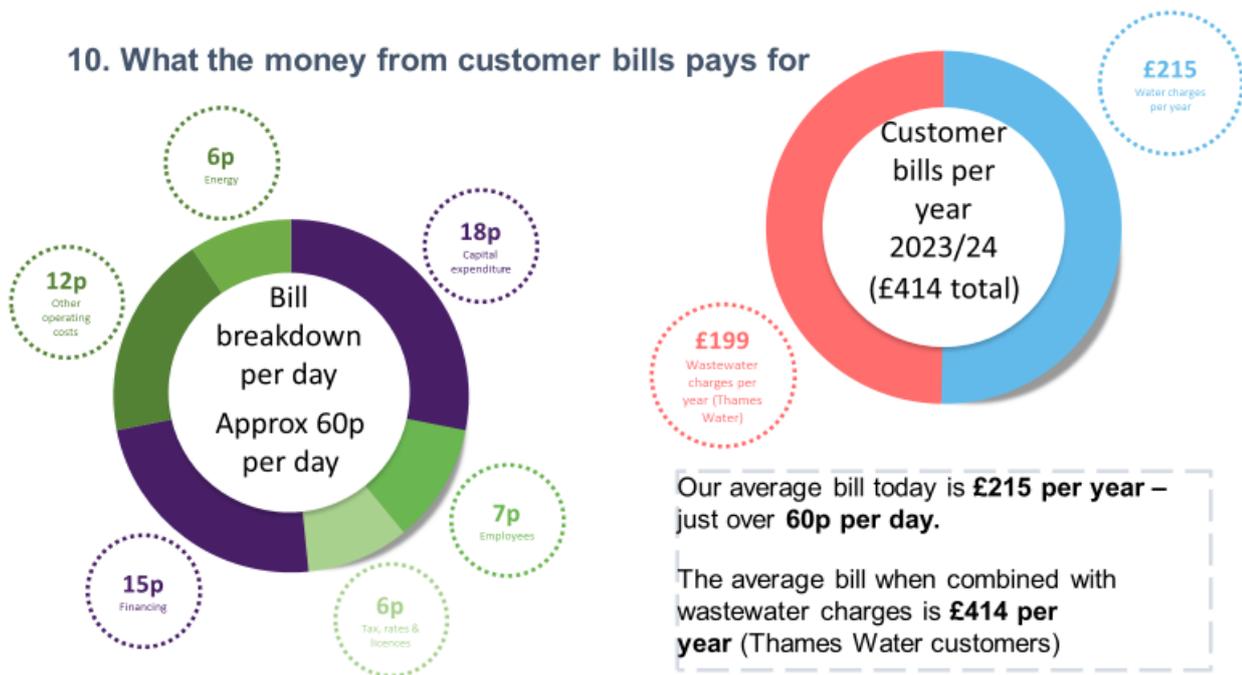
Help you reduce your water footprint and charge a fair price

- To reduce household water consumption to 110 litres per person per day and business consumption by 15%
- To eliminate water poverty so no customers spend more than 5% of disposable income on water

Improve the environment and have a positive impact on our local area

- To achieve net zero carbon emission (operational and embedded carbon)
- To enhance the environment and increase biodiversity on our sites and areas we work by up to 50%

10. What the money from customer bills pays for





Provide you with high quality water from sustainable sources

- Continue to meet the highest quality standards by maintaining and investing in our water treatment works
- Work with farmers to stop nitrates and pesticides from entering our water sources
- Replace lead pipes that supply schools and nurseries
- Confirm where we need to reduce our existing abstractions to protect and enhance the chalk streams in our area



Deliver a resilient water supply from source to tap

- Reduce leakage so only 9.5% of the water we supply is leaked - a 28% reduction since 2019/20
- Use our smart network to help us find and fix leaks more quickly
- Target the replacement of old water mains
- Use smart meters to find leaks on customers' pipes and plumbing and help fix them
- This investment will also help us to maintain and reduce supply interruptions and main bursts



Help you reduce your water footprint and charge a fair price

- Reduce our customers' water consumption by 20 litres to 131 litres per person per day
- Provide smart meters to households and businesses
- Use data from smart meters to help us provide customers with help and advice, targeting higher users
- Expand the impact of our education programme to embed the importance of water saving
- Develop our social tariff to help people struggling to pay



Improve the environment and have a positive impact on our local area

- Invest in schemes required by law to protect wildlife
- Work with partners to enhance the environment, increase resilience and improve biodiversity
- Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs
- Continue to improve biodiversity on 70% of the land we own
- Make more of our land accessible to the community

15. We will be showing you two plans

Preferred plan

- This is the water company's proposed plan and includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities

Must do plan

- This plan allows water companies to carry out the work that they are required to do by law
- This is also the least cost plan

16. Areas of Investment

The average SES Water bill will be, on average, **£19** more per year between 2025 and 2030 if we deliver all the investments in our **preferred plan**, than in 2025

- £12 is to meet the higher standards required by law and regulation (black)
- £7 is to improve our performance over and above this (white) which are optional

The average combined bill when Thames Water's wastewater services are included will rise by **£79 per year** (on average) between 2025 and 2030.

£
Must do

These are investments that SES must make.

£
Preferred plan
i.e. could do

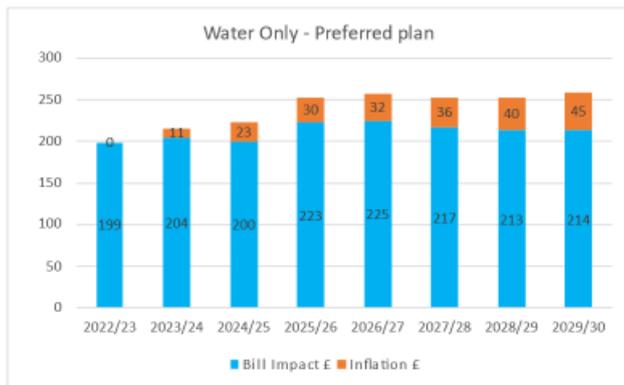
These are discretionary investments. SES proposes these to achieve additional benefits for customers and the environment.



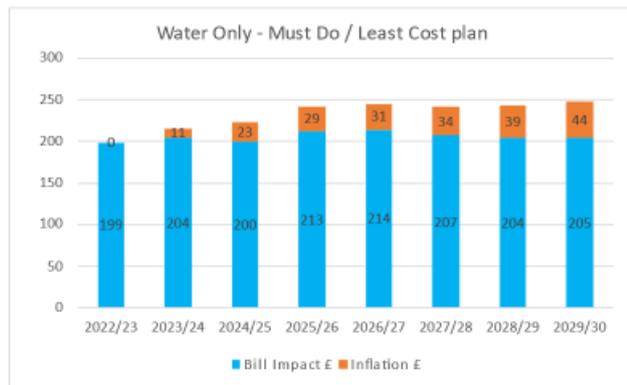
Figures shown do not include inflation

17. BILLS FROM to 2030 – SES Water only

SES Water – water only bill impact

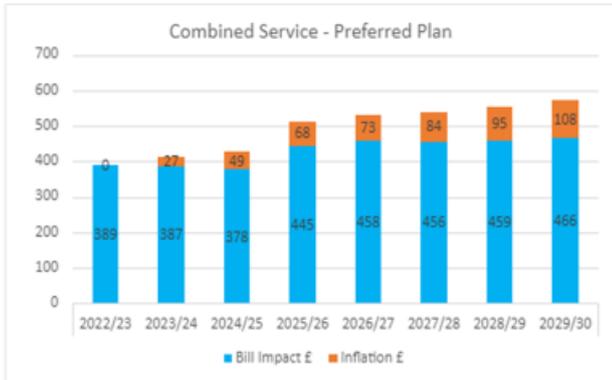


SES Water – water only bill impact

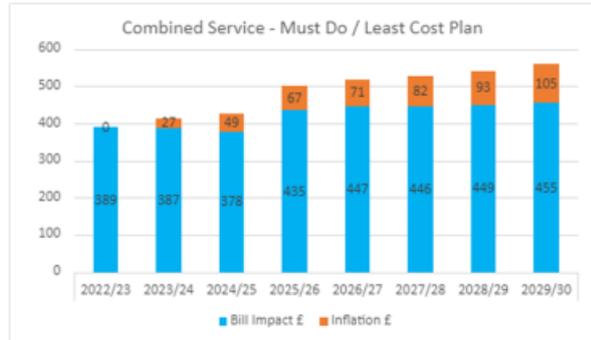


18. BILLS FROM to 2030 – Combined plan

SES Water/Thames Water – combined bill impact



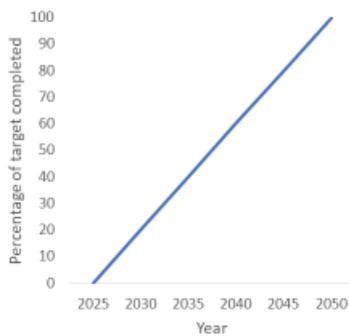
SES Water/Thames Water – combined bill impact



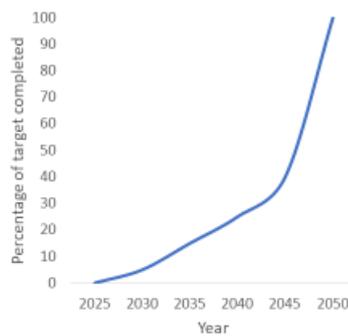
19. Phasing investment

You are about to see SES Water’s long-term ambitions but in some cases there are options for how we deliver them and at what pace – this could change the impact on customer bills. This can be done in three different ways

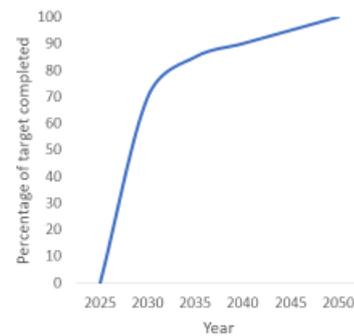
Steady progression



Slow start and the ramped up to 2050



Fast start and then steady to 2050



20. Water Industry National Environment Program

The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

Water companies have a programme of work to meet these laws, which includes:

- Reducing pollution of seas and rivers by sewage overflows.
- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- Treating water and wastewater to a standard that does not harm the natural environment.

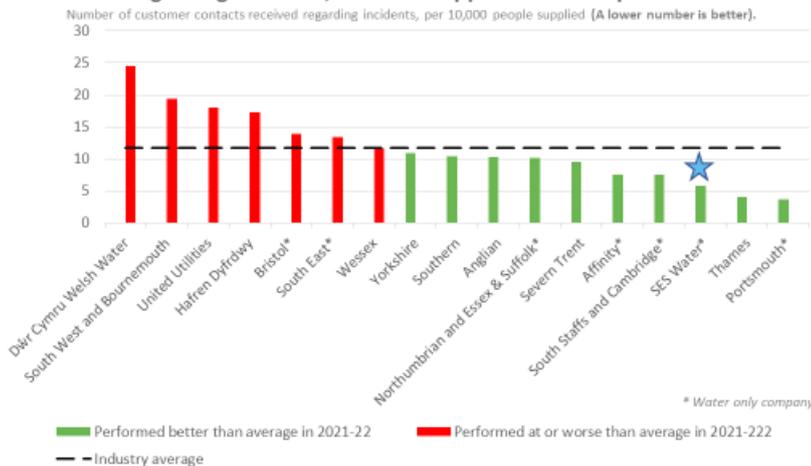


Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

8. Taste, smell and appearance of water

Tap water may taste/smell/look different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Water companies measured on number of customer contacts regarding the taste, smell and appearance of tap water



Company performance against industry average (A lower percentage is better)	
Water and Sewage company	Performance against industry average
Portsmouth*	-68%
Thames	-66%
SES Water*	-50%
Affinity*	-35%
South Staffs and Cambridge*	-35%
Severn Trent	-19%
Northumbrian and Essex & Suffolk*	-14%
Anglian	-12%
Southern	-11%
Yorkshire	-7%
Wessex	+/-0%
South East*	+15%
Bristol*	+19%
Hafren Dyfrdwy	+48%
United Utilities	+54%
South West and Bournemouth	+66%
Dŵr Cymru Welsh Water	+109%



21. Provide you with high quality water from sustainable sources

By 2050 our ambition is:

- To have always provided you with high-quality water that meets the highest standards
- To only use sources where we can take water without harming the environment



Between 2025 and 2030 we will:

Continue to meet the highest quality standards by maintaining and investing in our water treatment works and installing UV treatment

Must do investment to meet water quality standards.
£1.38

Work with farmers to stop nitrates and pesticides from entering our water sources, protect habitats and reduce the risk of non-native species

Must do investment to meet environmental laws (WINEP)
£0.77

Confirm where we need to reduce our existing abstractions to protect and enhance the chalk streams in our area

Must do investment to meet environmental laws (WINEP)
£0.37

Replace circa 175 lead pipes that supply schools and nurseries

Could do investment to improve water quality by reducing the risk of lead in water supplies
£1.26

22. Lead replacement

Drinking water containing high levels of lead can impact on health – particularly of young people

We add a chemical to water to protect water quality

We are required by law to replace lead pipes when high levels of lead are detected and we will replace SES lead pipes that supply customers' homes when customers replace their own supply pipes, and where supplies are shared with other properties

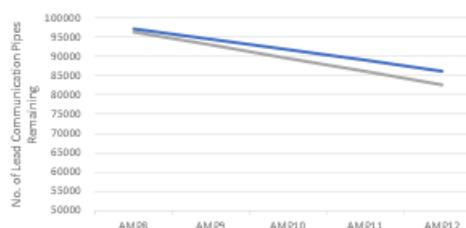
Our preferred plan is:

- To replace circa 175 lead pipes that supply colleges, schools and nurseries between 2025 and 2030
- After 2030 we will continue to proactively replace the lead pipes in our network and help customers to replace theirs

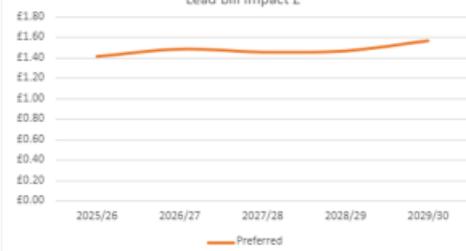
Our must do plan is:

- To continue with our current approach to replace lead pipes where high levels of lead are detected

Profile of remaining Lead Communication Pipes to end of AMP12



Lead Bill Impact £



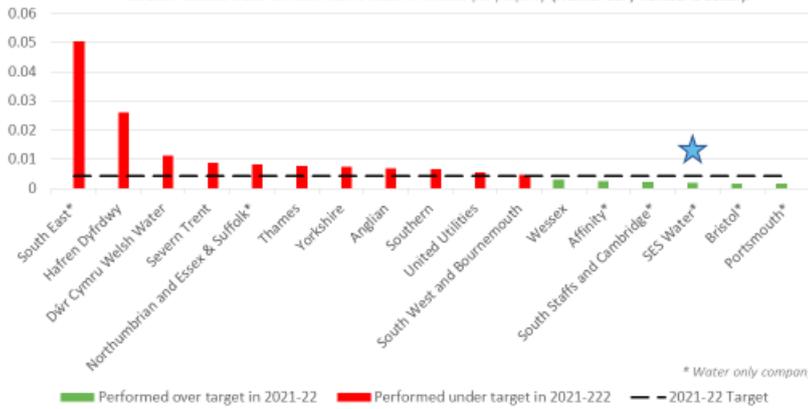
7. Water supply interruptions

Water supply interruptions, without warning, for longer than 3 hours.

If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Water companies measured on the length of time properties are without water

Duration without water for more than 3 hours in minutes per property (A lower bar / number is better).



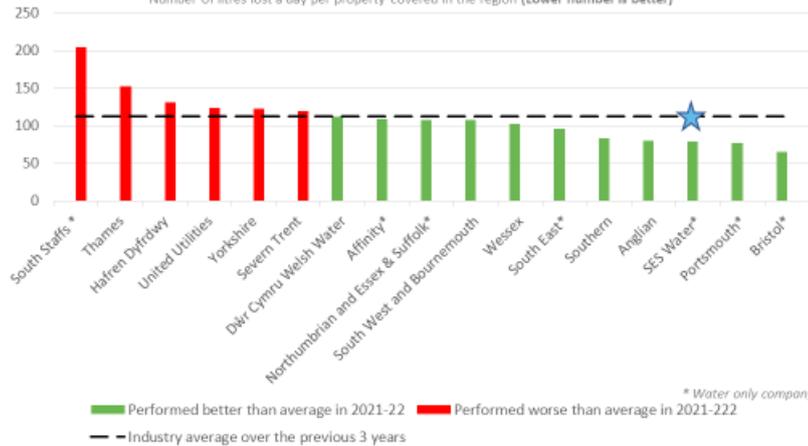
Company performance against targets (a lower percentage is better)	
Water and Sewage company	Performance against target
Portsmouth*	-62%
Bristol*	-59%
SES Water*	-52%
South Staffs and Cambridge*	-47%
Affinity*	-39%
Wessex	-32%
South West	+11%
United Utilities	+30%
Southern	+53%
Anglian	+60%
Yorkshire	+73%
Thames	+80%
Northumbrian and Essex & Suffolk	+92%
Severn Trent	+106%
Dŵr Cymru Welsh Water	+164%
Hafren Dyfrdwy	+511%
South East*	+1083%

9. Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Water companies measured on the amount of water lost due to leaks from water mains and pipes.

Number of litres lost a day per property covered in the region (Lower number is better)



Company performance against the industry average (a lower percentage is better)	
Water and Sewage company	Performance against 3 year average
Bristol*	-42%
Portsmouth*	-32%
SES Water*	-30%
Anglian	-29%
Southern	-27%
South East*	-15%
Wessex	-9%
Northumbrian and Essex & Suffolk*	-4%
South West and Bournemouth	-4%
Affinity*	-4%
Dŵr Cymru Welsh Water	-1%
Severn Trent	+6%
Yorkshire	+9%
United Utilities	+10%
Hafren Dyfrdwy	+16%
Thames	+35%
South Staffs & Cambridge*	+91%



23. Deliver a resilient water supply from source to tap

By 2050 our ambition is:

- For our water supplies to be resilient to climate change – including severe droughts
- For no-one to have their water supply interrupted for more than 3 hours
- For less than 5% of water we produce to be leaked from our pipes and yours



Between 2025 and 2030 we will:

Protect our water treatment works from climate change and other external threats and events

Must do – to meet new security regulations
£0.66

Could do – to protect sites from climate change and power outages
£1.43

Reduce leakage by 19% by finding and fixing leaks more quickly, replacing old water mains and using smart meters to find leaks on customers' pipes and plumbing

Must do – reduce leakage by finding and fixing more leaks
£3.47

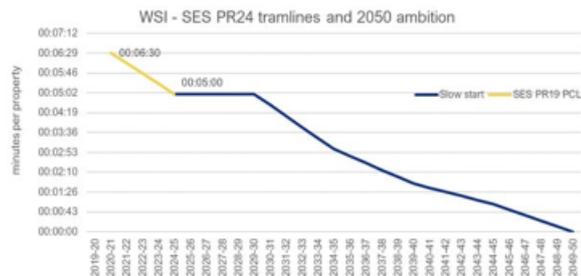
Could do – manage pressure to reduce leaks further
£0.34

Maintain our current performance for supply interruptions at less than 5 mins per year

No bill impact

24. Supply interruptions

- SES Water currently perform well in this area (less than 5 minutes of supply interruptions per household per year)
- Our preferred plan is to maintain performance over the next 5 years
- Beyond 2030 we will continue to invest in this area through replacing old water mains
- Our long-term target is for there to be no supply interruptions longer than 3 hours
- There will be no impact on bills between 2025 and 2030



25. Resilience

External factors can impact on our service.

We must meet statutory security requirements to make sure our drinking water sources are protected.

Other factors such as climate change and interruptions to power supplies could result in water treatment and production temporarily being stopped.

Our preferred plan:

- Increase the security of our sites in line with statutory requirements
- Carry out work to protect one of our water supply sites from flooding from the nearby River Mole – this has been identified by our work to look at the long-term impact of climate change
- Protect our sites from short term power outages by installing equipment that will automatically switch to standby generators to stop sites from shutting down

Our must do plan:

Increase the security of our sites in line with statutory requirements

26. Leakage reduction

22 million litres water per day is currently leaked from SES Water's pipes (70%) and customers' pipes (30%)

This is 13% of the water that is treated and put into supply each day.

The Government target is to reduce leakage by 50% by 2050 (from 2017/18 levels)

SES Water want to achieve the 50% reduction ahead of the Government target

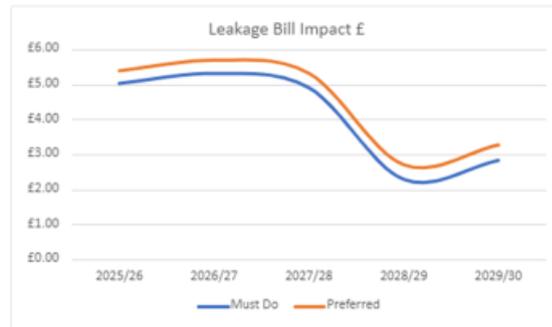
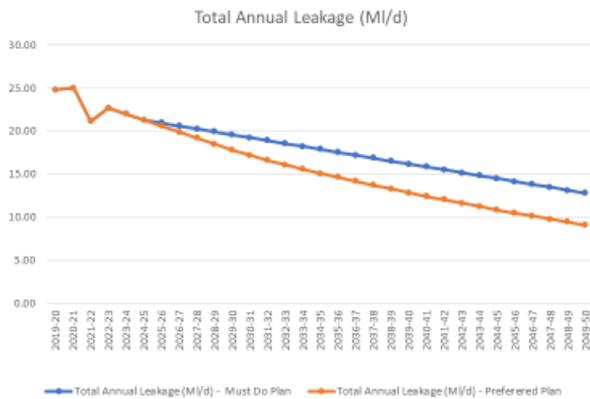
Our preferred plan is:

- To use our smart network to help find more leaks and repair them more quickly
- Roll out smart meters to all our customers to help us detect customer-side leaks and help fix them
- From 2030 we will start replacing old water mains to reduce the risks of leaks occurring
- **50% leakage reduction will be achieved by 2040**

Our must do plan is:

- To use our smart network to help find more leaks and repair them more quickly
- Roll our smart meters help us detect customer-side leaks and help fix them – fewer meters will be installed under our must do plan so leakage will not fall as quickly
- **50% leakage reduction will be achieved by 2050**

27. Leakage reduction

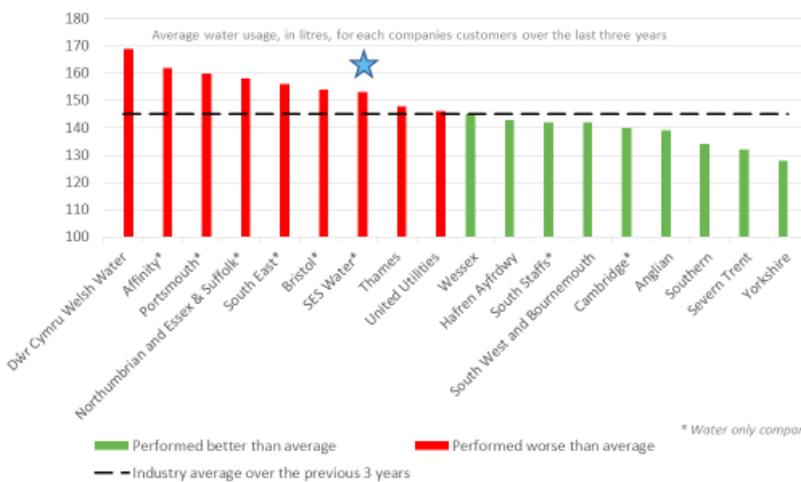


- Preferred plan – 65% leakage reduction by 2050
- Must do plan – 50% leakage reduction by 2050

28. Per Capita Consumption

An increasing population means extra demand for water while increasingly erratic weather patterns could lead to more droughts in the future. It is more important than ever for everyone to take care how they use water.

Water companies measured daily water usage per customer



Company performance against the industry average (a lower percentage is better)	
Water and Sewage company	Performance against 3 year average
Yorkshire	-17
Severn Trent	-13
Southern	-11
Anglian	-6
Cambridge*	-5
South Staffs*	-3
South West and Bournemouth	-3
Hafren Ayrdrwy	-2
Wessex	0
United Utilities	1
Thames	3
SES Water*	8
Bristol*	9
South East*	11
Northumbrian and Essex & Suffolk*	13
Portsmouth*	15
Affinity*	17
Dŵr Cymru Welsh Water	24



29. Help you reduce your water footprint and charge a fair price

By 2050 our ambition is:

- To reduce household water consumption to 110 litres per person per day and business consumption by 15%
- To eliminate water poverty so no customers spend more than 5% of disposable income on water



Between 2025 and 2030 we will:

Help reduce household water consumption to 131 litres per day by installing more smart meters (15,000 will be in place by 2025) and provide customers with help and advice, targeting higher users

Reduce non-household water consumption by 15% by providing smart meters

We will continue to provide a social tariff and additional support to customers with financial difficulties

Must do – we will provide 112,000 smart meters to homes and businesses
£5.51

Could do – we will provide an extra 80,000 smart meters to homes and businesses and provide extra water efficiency support
£2.61
£0.86

30. Smart meters

SES Water customers currently use circa **150 litres** of water per person per day

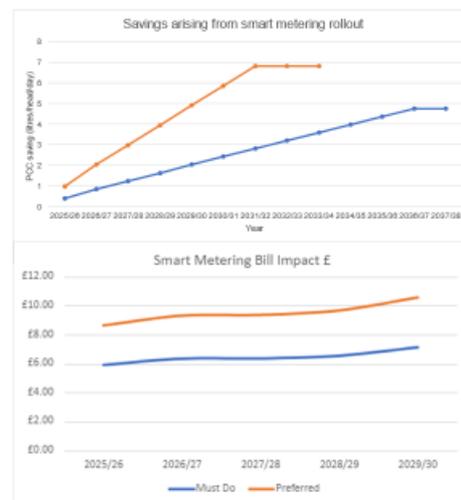
The Government target is:

- For household customers to use **110 litres per person per day by 2050** – a reduction of 40 litres per person
- For business customers to reduce their usage by 15% by 2050

Smart meters provide more information on how much water is being used and where. The data they produce will enable more targeted water efficiency support to be provided to customers.

Our preferred plan is:

- To provide smart meters to all our household and business customers by 2032 – 192,000 meters between 2025 and 2030 with enhanced technology
- To provide extra water efficiency advice to help target the highest users
- It will also contribute to greater leakage reduction



Our must do plan is;

- To provide smart meters to all our household and business customers by 2037 – 112,000 between 2025 and 2030
- The remaining 80,000 meters will be installed between 2030 and 2037.



31. Improve the environment and have a positive impact on our local area

By 2050 our ambition is:

- To achieve net zero carbon emission (operational and embedded carbon)
- To enhance the environment and increase biodiversity on our sites and areas we work by up to 50%



Between 2025 and 2030 we will:

Work with partners in the River Eden to enhance the environment, increase the resilience of our water supplies and improve biodiversity

Could do – investigations to identify nature-based solutions to improve water quality and water-based habitats
£0.07

Continue to improve biodiversity on 70% of the land we own

Could do – carry out work on or at our main sites to improve the way we manage the land to attract a wider range of species and wildlife
£0.11

Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs

No bill impact

32. Environmental enhancement

We could take action to go beyond our statutory requirements (identified in the WINEP) and further enhance the environment and increase biodiversity.

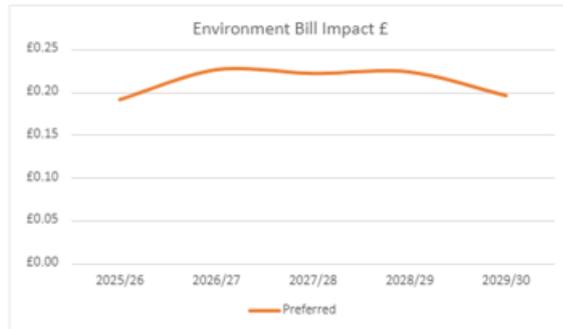
The Government has set a long-term target to increase biodiversity and support nature recovery.

Our preferred plan is:

- To investigate opportunities for nature-based solutions in the River Eden catchment during 2025 to 2030
- To deliver the solutions from 2030 onwards
- To carry out work on our own sites to increase biodiversity

Our must do plan is:

- No additional investment in this area



7.1.10 NHH Deliberative event stimulus

Wholesale water companies in England and Wales

Wholesale water companies are regional: people have to receive water services from the company that covers where they live

- There are 11 water companies that provide **both water and sewerage services**
- There are also 5 companies that provide water services only – **SES Water is a water only company**
- Some households have two separate suppliers:
- e.g. people in SES Water's supply area receive **water services from SES Water** and **sewerage services from Thames Water or Southern Water**



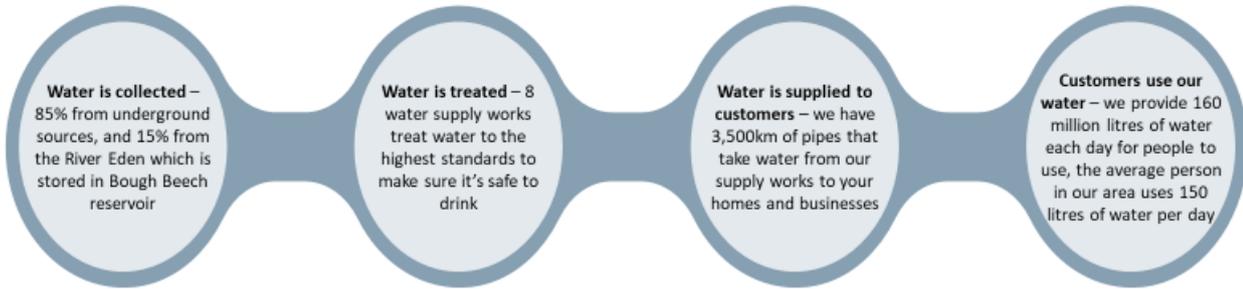
2. SES Water's supply area

- SES supply drinking water to 745,000 people and 8,000 businesses in parts of Surrey, West Sussex, Kent and South London
- Thames Water supply the wastewater services to the majority of our customers
- Southern Water supply the wastewater services to customers in the Kent area



3. What SES Water do

Water supply (SES Water):



Wastewater service (Thames Water)

- **Wastewater is removed** – wastewater is taken away from homes through a network of sewers and pumping stations
- **Wastewater is treated** – wastewater treatment works clean the wastewater so that it can be safely returned to the environment

- **Customers are billed** – we bill customers for our water supply service and provide the bills on behalf of Thames Water for their wastewater service (if you are a Southern Water wastewater customer you will receive two bills)

40. How the retail market works

Whilst organisations in England are **NOT** able to choose which supplier provides the water to their organisation (the wholesaler), or the one who takes away their waste water, since April 2017 most organisations can choose which company they want to send them their water bills, read their water meter or handle any customer service queries (the retailer). The picture below explains how this arrangement works.



4. The role of customers in a price review process



Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As customers are not able to choose their water company, water companies must give them a say about what they want from their services and the price they pay. Talking to customers also helps water companies prioritise what to do first or what to do most of – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.

The business plan and prices are then finalised by Ofwat in a process known as the **Price Review**. There is more information about this here: 'All about the price review'. Available at: <https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are 'acceptable' to you and whether you can afford the proposed bills from 2025-2030. Companies also have to show to Ofwat that their plans reflect what their customers want – that means refining the plans based on what customers tell them.

5. How water companies are monitored



Water companies are currently part way through their five-year business plan for 2020 to 2025. They have service level targets, called 'performance commitments', in every five-year business plan. These targets are based on what customers have previously told companies they would like them to do, and on Ofwat's assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

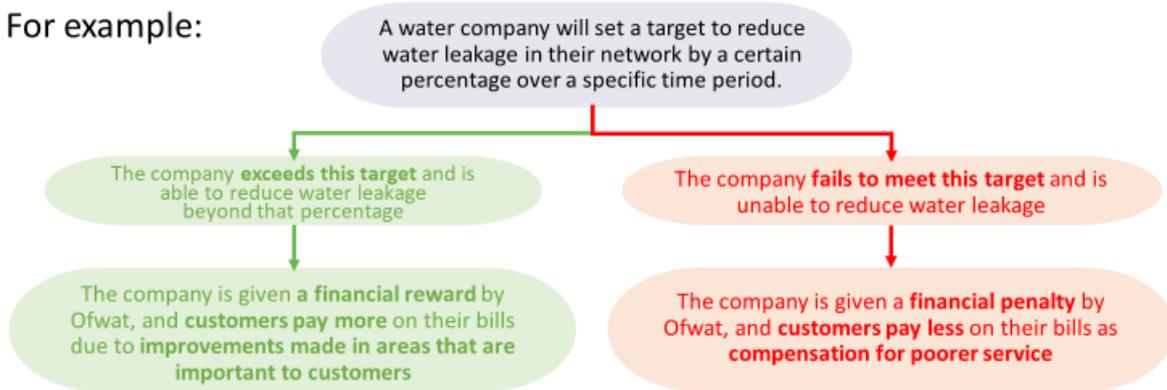
Water companies have to provide reliable services, and plan for their services to be resilient to changing weather patterns and demand from consumers. Companies can miss or exceed performance commitment targets for a number of reasons. For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets.



6. How water companies are monitored cont...

As part of their responsibility to provide clean and safe water to households and businesses, regulators set targets and performance standards for UK water companies. Outcome Delivery Incentives (ODIs) are a part of this framework and act as a system of financial rewards and penalties that are placed to encourage water companies to perform beyond their committed levels of service in order to benefit customers, the environment, and improve overall service.

For example:



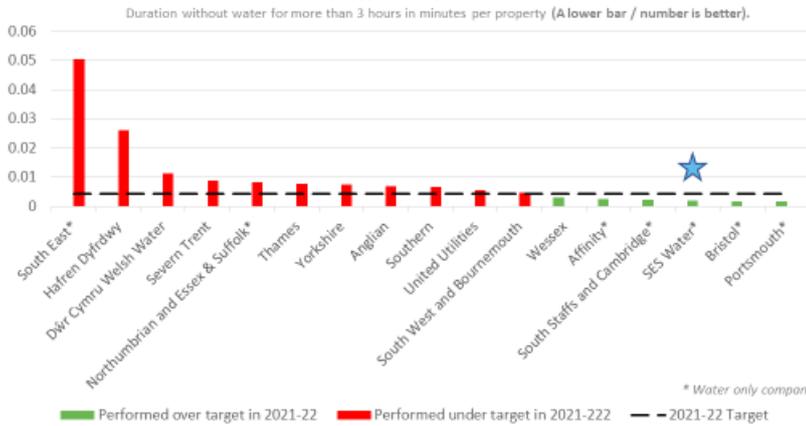
Last year SES Water **passed 17** and **failed 8** performance commitment targets, costing them a penalty of £0.3m (equating to a £1.30 decrease on the average household bill)

7. Water supply interruptions

Water supply interruptions, without warning, for longer than 3 hours.

If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Water companies measured on the length of time properties are without water

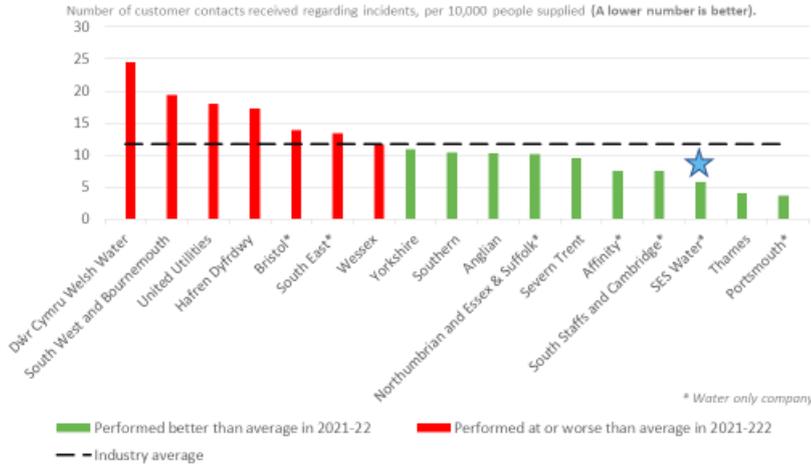


Company performance against targets (a lower percentage is better)	
Water and Sewage company	Performance against target
Portsmouth*	-62%
Bristol*	-59%
SES Water*	-52%
South Staffs and Cambridge*	-47%
Affinity*	-39%
Wessex	-32%
South West	+11%
United Utilities	+30%
Southern	+53%
Anglian	+60%
Yorkshire	+73%
Thames	+80%
Northumbrian and Essex & Suffolk	+92%
Severn Trent	+106%
Dŵr Cymru Welsh Water	+164%
Hafren Dyfrdwy	+511%
South East*	+1083%

8. Taste, smell and appearance of water

Tap water may taste/smell/look different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Water companies measured on number of customer contacts regarding the taste, smell and appearance of tap water



Company performance against industry average (A lower percentage is better)

Water and Sewerage company	Performance against industry average
Portsmouth*	-68%
Thames	-66%
SES Water*	-50%
Affinity*	-35%
South Staffs and Cambridge*	-35%
Severn Trent	-19%
Northumbrian and Essex & Suffolk*	-14%
Anglian	-12%
Southern	-11%
Yorkshire	-7%
Wessex	+/-0%
South East*	+15%
Bristol*	+19%
Hafren Dyfrdwy	+48%
United Utilities	+54%
South West and Bournemouth	+66%
Dŵr Cymru Welsh Water	+109%

9. Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

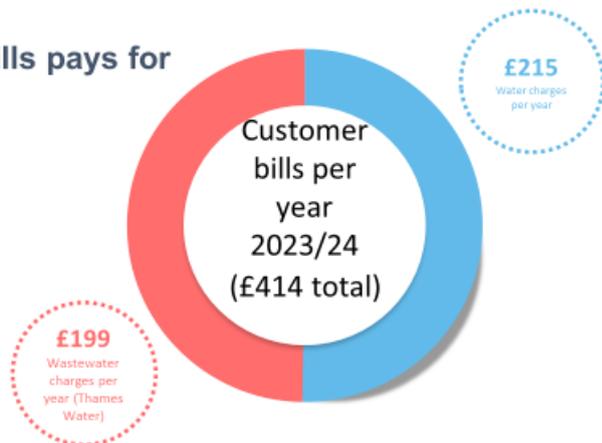
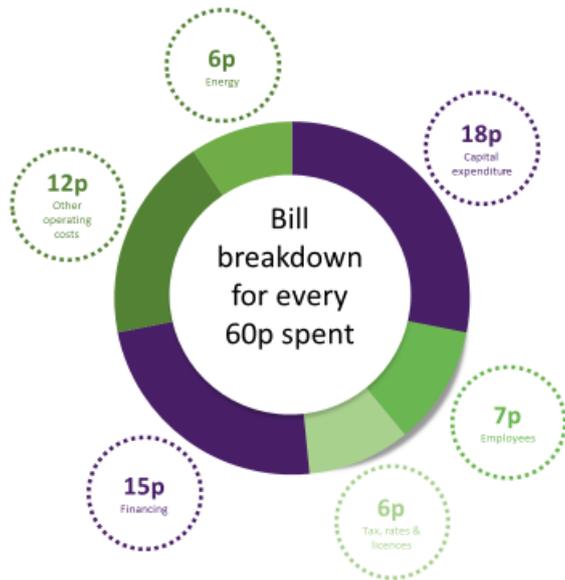
Water companies measured on the amount of water lost due to leaks from water mains and pipes.



Company performance against the industry average (a lower percentage is better)

Water and Sewerage company	Performance against 3 year average
Bristol*	-42%
Portsmouth*	-32%
SES Water*	-30%
Anglian	-29%
Southern	-27%
South East*	-15%
Wessex	-9%
Northumbrian and Essex & Suffolk*	-4%
South West and Bournemouth	-4%
Affinity*	-4%
Dŵr Cymru Welsh Water	-1%
Severn Trent	+6%
Yorkshire	+9%
United Utilities	+10%
Hafren Dyfrdwy	+16%
Thames	+35%
South Staffs & Cambridge*	+91%

10. What the money from customer bills pays for

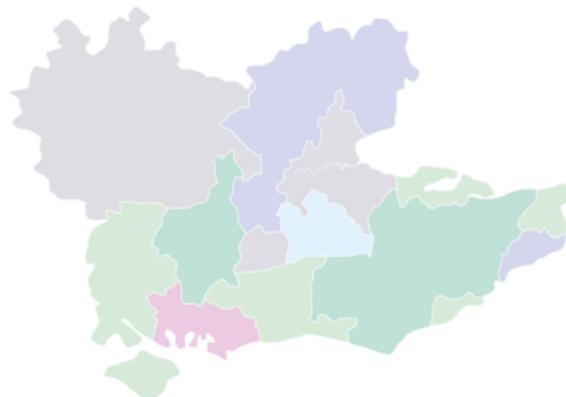


Our average domestic customer bill today is **£215 per year** – just over **60p per day**.

The average bill when combined with wastewater charges is **£414 per year** (Thames Water customers)

11. Company challenges

- South East England is classified by Government as being in serious water stress
- Climate change and a growing population = future shortfall in water supplies
- SES Water and its neighbouring companies rely on rivers and chalk streams to provide your water which are sensitive habitats which need to be protected
- Water companies will have to reduce how much water they take from some of their existing sources
- These sources will need to be replaced by
 - reducing leakage and water consumption
 - companies building new sources of water such as reservoirs and desalination plants
 - transferring more water between companies
- SES Water's **Water Resources Management Plan (WRMP)** sets out how the company will secure its water resources in the future and meet its legal obligations.



Potential regional shortfall in water – 1 billion litres per day by 2035

12. Company challenges

Climate change	New statutory requirements	Population growth	Economic factors
<ul style="list-style-type: none">• Climate change means we could see hotter, drier summers and wetter winters• This could result in less water in the environment in summer, but more pressure on the water system in the winter.• There could be between 3 and 7.5 million litres less water available from our existing sources by 2050	<ul style="list-style-type: none">• Improving the quality of the water sources we use• Protecting rivers and chalk streams – we may need to reduce how much water we take from our existing sources by up to 30 million litres per day• Reducing leakage by 50% by 2050• Reducing household consumption to 110 litres per person per day by 2050• Reducing non-household consumption by 15% by 2050	<ul style="list-style-type: none">• As the population in the area increases, so does the demand for water• Current forecasts predict population growth of between 5 and 15% by 2050, resulting in between 2.6 and 9 million litres of water extra being needed each day	<ul style="list-style-type: none">• Cost of living crisis is making some people's bills unaffordable• Investment to meet new statutory requirements and further improve service will cost more• Rising inflation will increase bills further

There are also opportunities.....

- Advances in technology is changing how SES Water deliver their service – fully smart pipe network
- Smart meters will help detect more leaks and help customers manage their own consumption
- Other technological advances could help reduce leaks and supply interruptions further, reduce carbon emissions and help protect water quality

13. 2050 ambitions

Provide you with high quality water from sustainable sources

- To have always provided you with high-quality water that meets the highest standards
- To only use sources where we can take water without harming the environment

Deliver a resilient water supply from source to tap

- For our water supplies to be resilient to climate change – including severe droughts
- For no-one to have their water supply interrupted for more than 3 hours
- For less than 5% of water we produce to be leaked from our pipes and yours

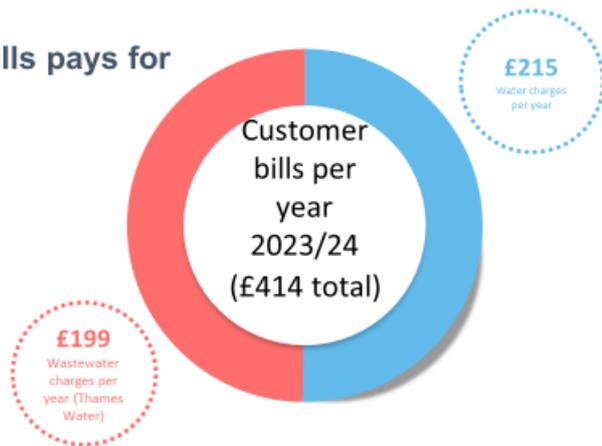
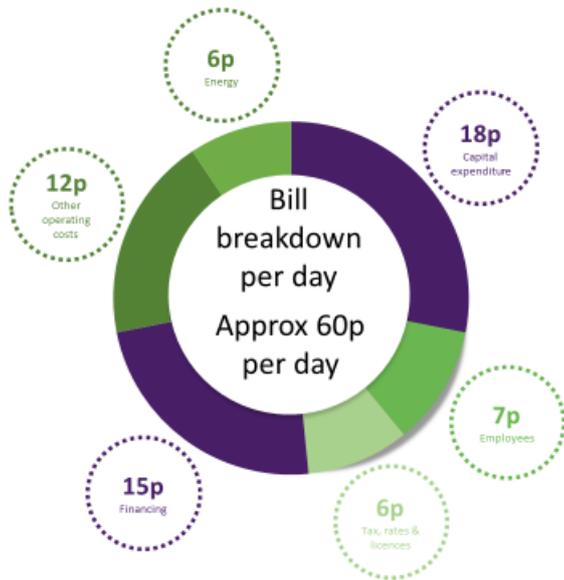
Help you reduce your water footprint and charge a fair price

- To reduce household water consumption to 110 litres per person per day and business consumption by 15%
- To eliminate water poverty so no customers spend more than 5% of disposable income on water

Improve the environment and have a positive impact on our local area

- To achieve net zero carbon emission (operational and embedded carbon)
- To enhance the environment and increase biodiversity on our sites and areas we work by up to 50%

10. What the money from customer bills pays for



Our average bill today is **£215 per year** – just over **60p per day**.

The average bill when combined with wastewater charges is **£414 per year** (Thames Water customers)

			
<p>Provide you with high quality water from sustainable sources</p> <ul style="list-style-type: none"> Continue to meet the highest quality standards by maintaining and investing in our water treatment works Work with farmers to stop nitrates and pesticides from entering our water sources Replace lead pipes that supply schools and nurseries Confirm where we need to reduce our existing abstractions to protect and enhance the chalk streams in our area 	<p>Deliver a resilient water supply from source to tap</p> <ul style="list-style-type: none"> Reduce leakage so only 9.5% of the water we supply is leaked - a 28% reduction since 2019/20 Use our smart network to help us find and fix leaks more quickly Target the replacement of old water mains Use smart meters to find leaks on customers' pipes and plumbing and help fix them This investment will also help us to maintain and reduce supply interruptions and main bursts 	<p>Help you reduce your water footprint and charge a fair price</p> <ul style="list-style-type: none"> Reduce our customers' water consumption by 20 litres to 131 litres per person per day Provide smart meters to households and businesses Use data from smart meters to help us provide customers with help and advice, targeting higher users Expand the impact of our education programme to embed the importance of water saving Develop our social tariff to help people struggling to pay 	<p>Improve the environment and have a positive impact on our local area</p> <ul style="list-style-type: none"> Invest in schemes required by law to protect wildlife Work with partners to enhance the environment, increase resilience and improve biodiversity Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs Continue to improve biodiversity on 70% of the land we own Make more of our land accessible to the community

15. We will be showing you two plans

Preferred plan	Must do plan
<ul style="list-style-type: none"> This is the water company's proposed plan and includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities 	<ul style="list-style-type: none"> This plan allows water companies to carry out the work that they are required to do by law This is also the least cost plan

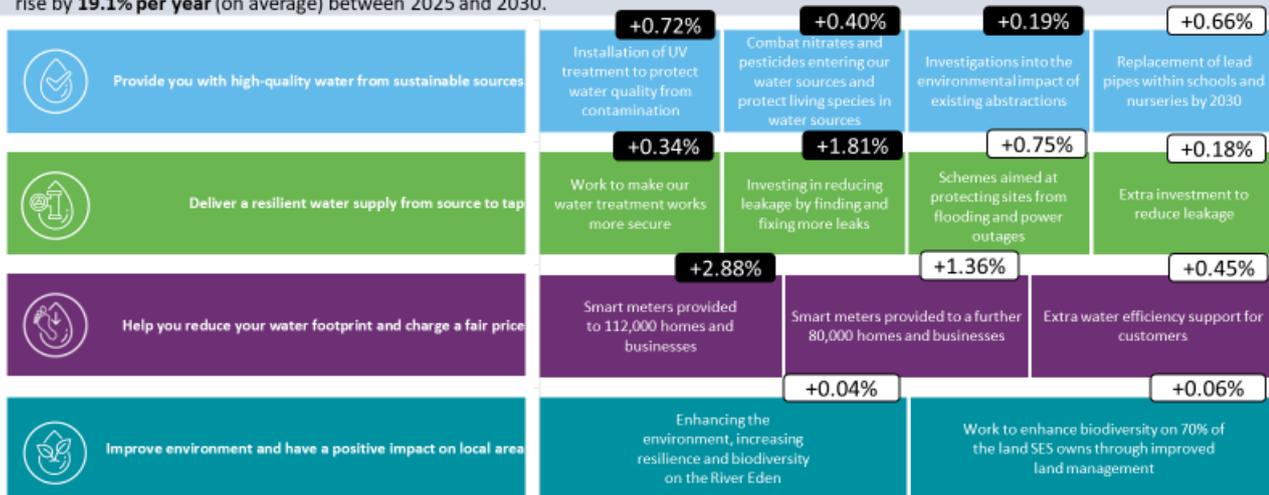
16. Areas of Investment

The average SES Water bill will be, on average, **9.9%** more per year between 2025 and 2030 if we deliver all the investments in our **preferred plan**, than in 2025

- 6.3% is to meet the higher standards required by law and regulation (black)
 - 3.6% is to improve our performance over and above this (white) which are optional
- The average combined bill when Thames Water's wastewater services are included will rise by **19.1% per year** (on average) between 2025 and 2030.

£ Must do These are investments that SES must make.

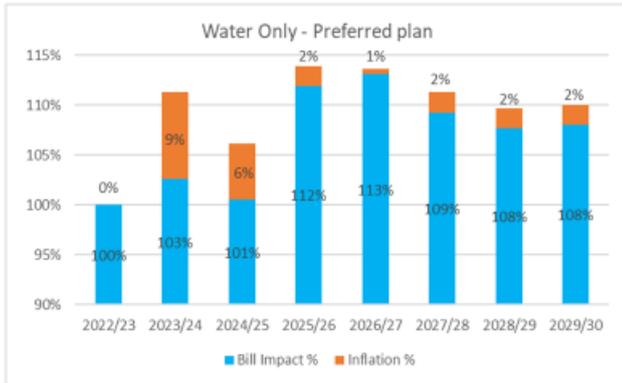
£ Preferred plan i.e. could do These are discretionary investments. SES proposes these to achieve additional benefits for customers and the environment.



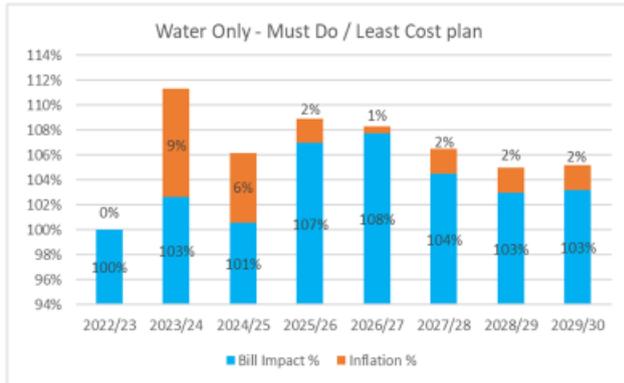
Figures shown do not include inflation

17. BILLS FROM to 2030 – SES Water only

SES Water – water only bill impact

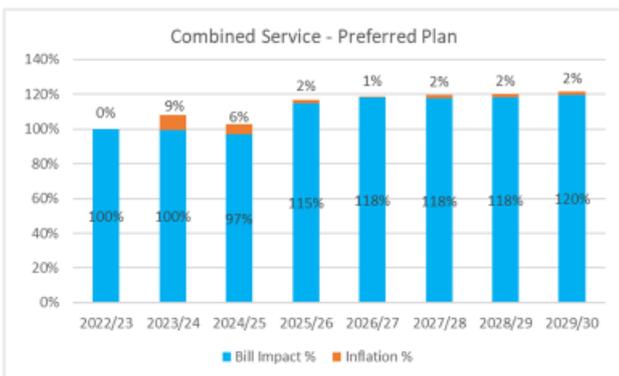


SES Water – water only bill impact

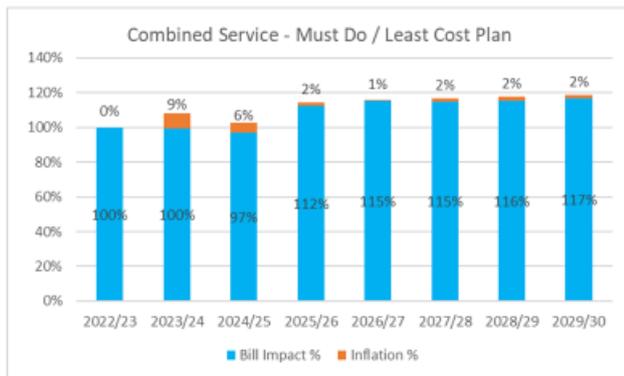


18. BILLS FROM to 2030 – Combined plan

SES Water/Thames Water – combined bill impact

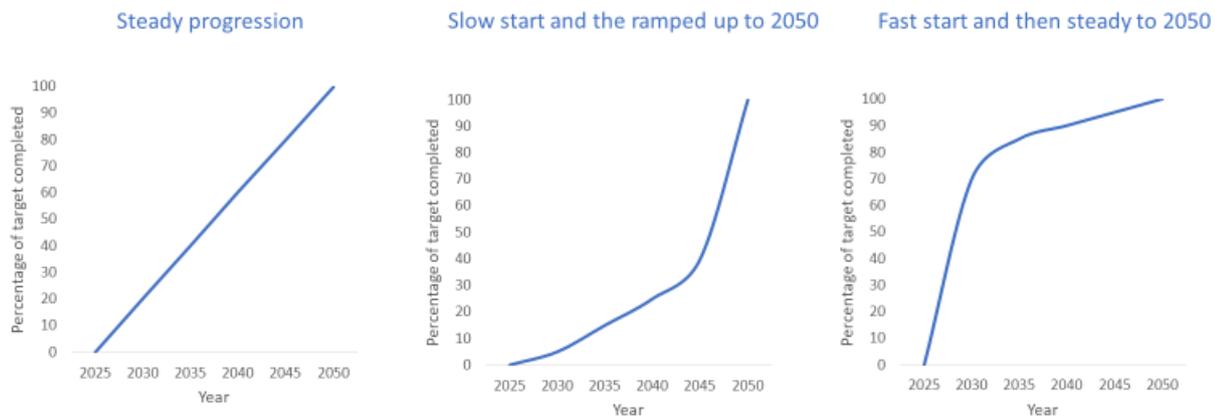


SES Water/Thames Water – combined bill impact



19. Phasing investment

You are about to see SES Water's long-term ambitions but in some cases there are options for how we deliver them and at what pace – this could change the impact on customer bills. This can be done in three different ways



20. Water Industry National Environment Program

The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

Water companies have a programme of work to meet these laws, which includes:

- Reducing pollution of seas and rivers by sewage overflows.
- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- Treating water and wastewater to a standard that does not harm the natural environment.

Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

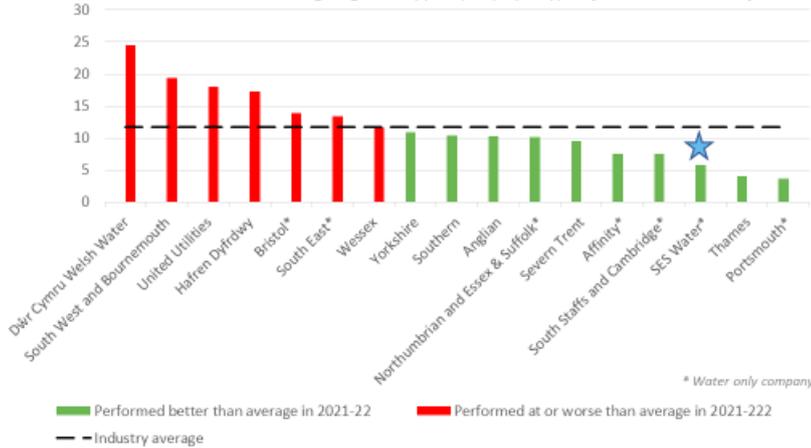


8. Taste, smell and appearance of water

Tap water may taste/smell/look different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.

Water companies measured on number of customer contacts regarding the taste, smell and appearance of tap water

Number of customer contacts received regarding incidents, per 10,000 people supplied (A lower number is better).



Company performance against industry average (A lower percentage is better)

Water and Sewage company	Performance against industry average
Portsmouth*	-68%
Thames	-66%
SES Water*	-50%
Affinity*	-35%
South Staffs and Cambridge*	-35%
Severn Trent	-19%
Northumbrian and Essex & Suffolk*	-14%
Anglian	-12%
Southern	-11%
Yorkshire	-7%
Wessex	+/-0%
South East*	+15%
Bristol*	+19%
Hafren Dyfrdwy	+48%
United Utilities	+54%
South West and Bournemouth	+66%
Dŵr Cymru Welsh Water	+109%



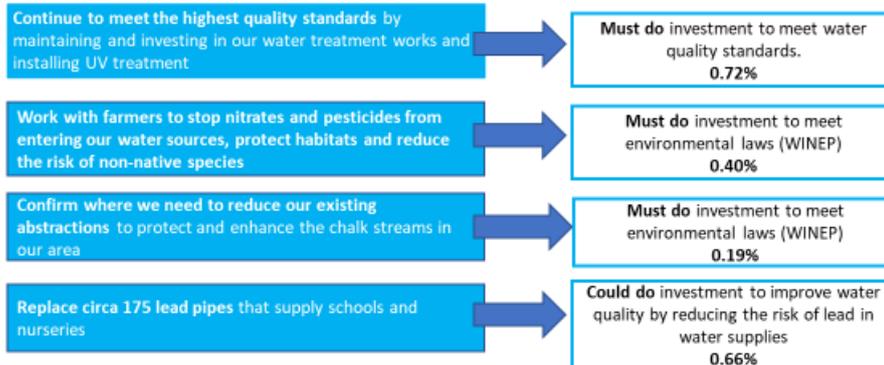
21. Provide you with high quality water from sustainable sources

By 2050 our ambition is:

- To have always provided you with high-quality water that meets the highest standards
- To only use sources where we can take water without harming the environment



Between 2025 and 2030 we will:



22. Lead replacement

Drinking water containing high levels of lead can impact on health – particularly of young people

We add a chemical to water to protect water quality

We are required by law to replace leads pipes when high levels of lead are detected and we will replace SES lead pipes that supply customers' homes when customers replace their own supply pipes, and where supplies are shared with other properties

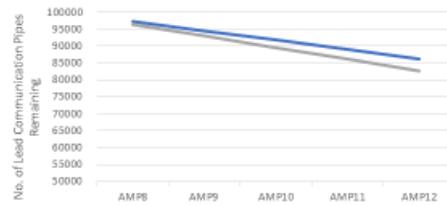
Our preferred plan is:

- To replace circa 175 lead pipes that supply colleges, schools and nurseries between 2025 and 2030
- After 2030 we will continue to proactively replace the lead pipes in our network and help customers to replace theirs

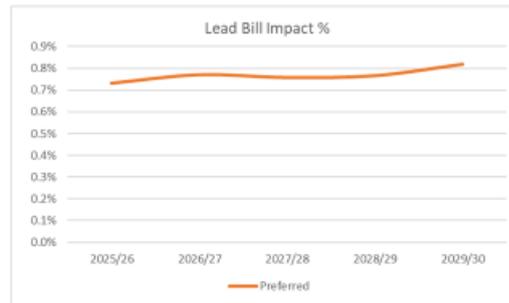
Our must do plan is:

- To continue with our current approach to replace lead pipes where high levels of lead are detected

Profile of remaining Lead Communication Pipes to end of AMP12



Lead Bill Impact %

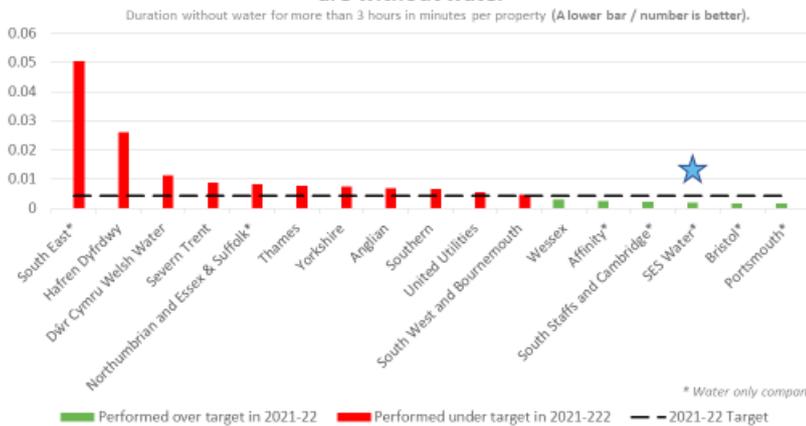


7. Water supply interruptions

Water supply interruptions, without warning, for longer than 3 hours.

If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.

Water companies measured on the length of time properties are without water

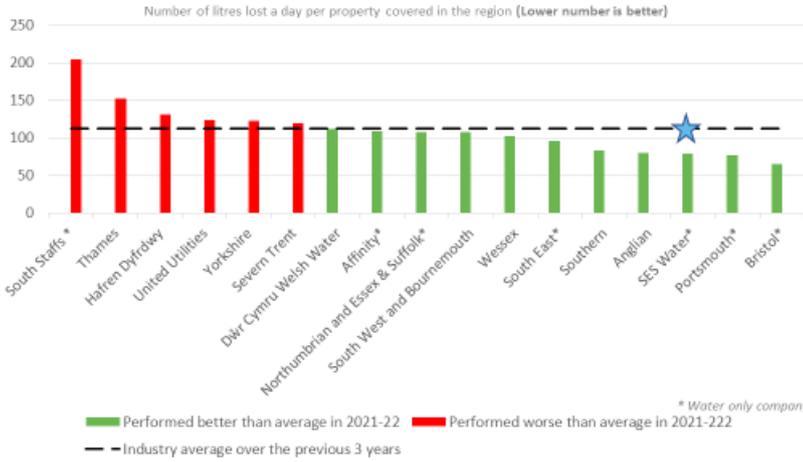


Company performance against targets (a lower percentage is better)	
Water and Sewage company	Performance against target
Portsmouth*	-62%
Bristol*	-59%
SES Water*	-52%
South Staffs and Cambridge*	-47%
Affinity*	-39%
Wessex	-32%
South West	+11%
United Utilities	+30%
Southern	+53%
Anglian	+60%
Yorkshire	+73%
Thames	+80%
Northumbrian and Essex & Suffolk	+92%
Severn Trent	+106%
Dŵr Cymru Welsh Water	+164%
Hafren Dyfrdwy	+511%
South East*	+1083%

9. Reducing leaks

Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.

Water companies measured on the amount of water lost due to leaks from water mains and pipes.



Water and Sewage company	Performance against 3 year average
Bristol*	-42%
Portsmouth*	-32%
SES Water*	-30%
Anglian	-29%
Southern	-27%
South East*	-15%
Wessex	-9%
Northumbrian and Essex & Suffolk*	-4%
South West and Bournemouth	-4%
Affinity*	-4%
Dŵr Cymru Welsh Water	-1%
Severn Trent	+6%
Yorkshire	+9%
United Utilities	+10%
Hafren Dyfrdwy	+16%
Thames	+35%
South Staffs & Cambridge*	+91%



23. Deliver a resilient water supply from source to tap

By 2050 our ambition is:

- For our water supplies to be resilient to climate change – including severe droughts
- For no-one to have their water supply interrupted for more than 3 hours
- For less than 5% of water we produce to be leaked from our pipes and yours



Between 2025 and 2030 we will:

Protect our water treatment works from climate change and other external threats and events

Must do – to meet new security regulations
0.34%

Could do – to protect sites from climate change and power outages
0.75%

Reduce leakage by 19% by finding and fixing leaks more quickly, replacing old water mains and using smart meters to find leaks on customers' pipes and plumbing

Must do – reduce leakage by finding and fixing more leaks
1.81%

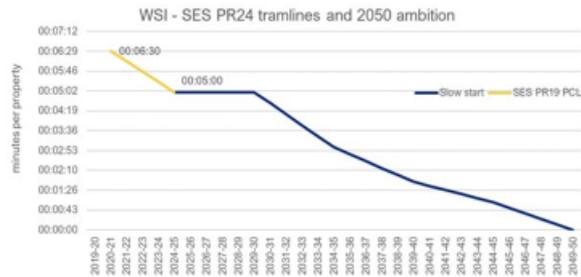
Could do – manage pressure to reduce leaks further
0.18%

Maintain our current performance for supply interruptions at less than 5 mins per year

No bill impact

24. Supply interruptions

- SES Water currently perform well in this area (less than 5 minutes of supply interruptions per household per year)
- Our preferred plan is to maintain performance over the next 5 years
- Beyond 2030 we will continue to invest in this area through replacing old water mains
- Our long-term target is for there to be no supply interruptions longer than 3 hours
- There will be no impact on bills between 2025 and 2030



25. Resilience

External factors can impact on our service.

We must meet statutory security requirements to make sure our drinking water sources are protected.

Other factors such as climate change and interruptions to power supplies could result in water treatment and production temporarily being stopped.

Our preferred plan:

- Increase the security of our sites in line with statutory requirements
- Carry out work to protect one of our water supply sites from flooding from the nearby River Mole – this has been identified by our work to look at the long-term impact of climate change
- Protect our sites from short term power outages by installing equipment that will automatically switch to standby generators to stop sites from shutting down

Our must do plan:

Increase the security of our sites in line with statutory requirements

26. Leakage reduction

22 million litres water per day is currently leaked from SES Water's pipes (70%) and customers' pipes (30%)

This is 13% of the water that is treated and put into supply each day.

The Government target is to reduce leakage by 50% by 2050 (from 2017/18 levels)

SES Water want to achieve the 50% reduction ahead of the Government target

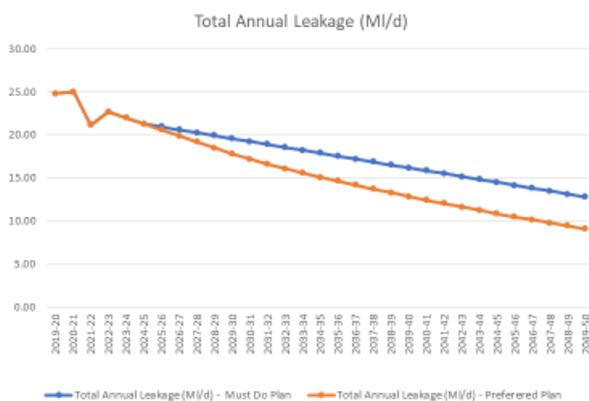
Our preferred plan is:

- To use our smart network to help find more leaks and repair them more quickly
- Roll out smart meters to all our customers to help us detect customer-side leaks and help fix them
- From 2030 we will start replacing old water mains to reduce the risks of leaks occurring
- **50% leakage reduction will be achieved by 2040**

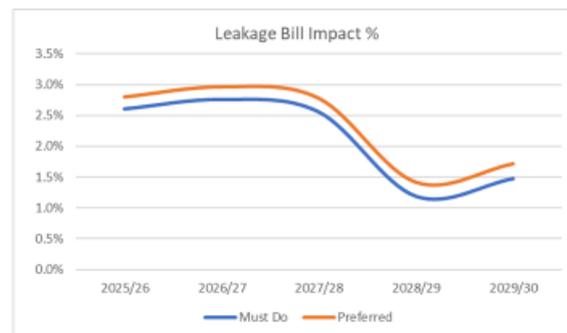
Our must do plan is:

- To use our smart network to help find more leaks and repair them more quickly
- Roll our smart meters help us detect customer-side leaks and help fix them – fewer meters will be installed under our must do plan so leakage will not fall as quickly
- **50% leakage reduction will be achieved by 2050**

27. Leakage reduction



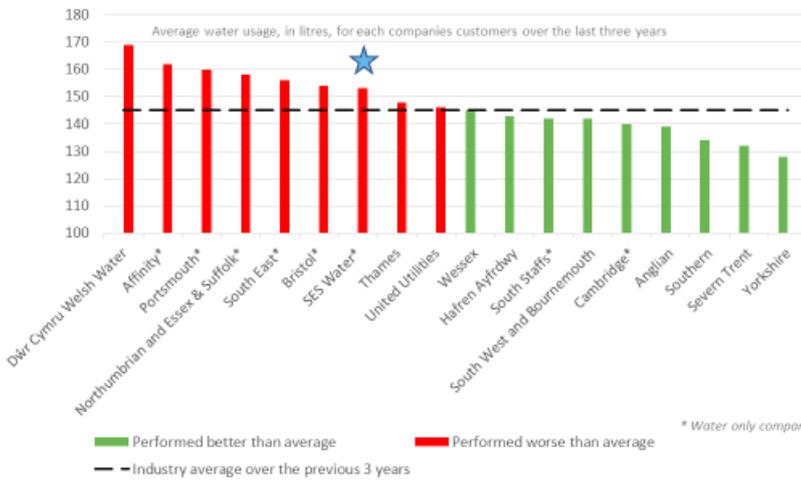
- Preferred plan – 65% leakage reduction by 2050
- Must do plan – 50% leakage reduction by 2050



28. Per Capita Consumption

An increasing population means extra demand for water while increasingly erratic weather patterns could lead to more droughts in the future. It is more important than ever for everyone to take care how they use water.

Water companies measured daily water usage per customer



Company performance against the industry average (a lower percentage is better)

Water and Sewage company	Performance against 3 year average
Yorkshire	-17
Severn Trent	-13
Southern	-11
Anglian	-6
Cambridge*	-5
South Staffs*	-3
South West and Bournemouth	-3
Hafren Ayrddwy	-2
Wessex	0
United Utilities	1
Thames	3
SES Water*	8
Bristol*	9
South East*	11
Northumbrian and Essex & Suffolk*	13
Portsmouth*	15
Affinity*	17
Dŵr Cymru Welsh Water	24



29. Help you reduce your water footprint and charge a fair price

By 2050 our ambition is:

- To reduce household water consumption to 110 litres per person per day and business consumption by 15%
- To eliminate water poverty so no customers spend more than 5% of disposable income on water



Between 2025 and 2030 we will:

Help reduce household water consumption to 131 litres per day by installing more smart meters (15,000 will be in place by 2025) and provide customers with help and advice, targeting higher users

Reduce non-household water consumption by 15% by providing smart meters

We will continue to provide a social tariff and additional support to customers with financial difficulties

Must do – we will provide 112,000 smart meters to homes and businesses
2.88%

Could do – we will provide an extra 80,000 smart meters to homes and businesses and provide extra water efficiency support
1.36%
0.45%

30. Smart meters

SES Water customers currently use circa **150 litres** of water per person per day

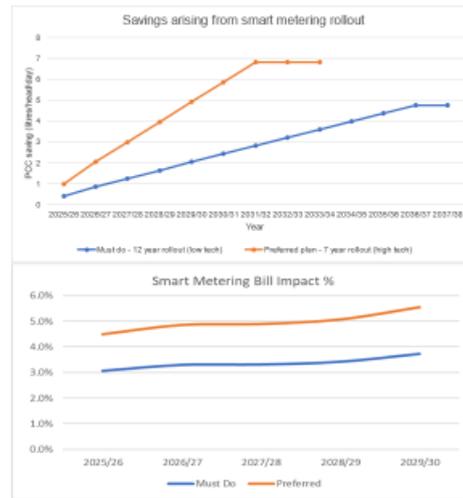
The Government target is:

- For household customers to use **110 litres per person per day by 2050** – a reduction of 40 litres per person
- For business customers to reduce their usage by 15% by 2050

Smart meters provide more information on how much water is being used and where. The data they produce will enable more targeted water efficiency support to be provided to customers.

Our preferred plan is:

- To provide smart meters to all our household and business customers by 2032 – 192,000 meters between 2025 and 2030 with enhanced technology
- To provide extra water efficiency advice to help target the highest users
- It will also contribute to greater leakage reduction



Our must do plan is;

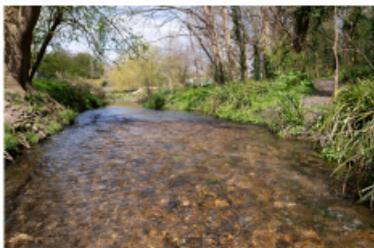
- To provide smart meters to all our household and business customers by 2037 – 112,000 between 2025 and 2030
- The remaining 80,000 meters will be installed between 2030 and 2037.



31. Improve the environment and have a positive impact on our local area

By 2050 our ambition is:

- To achieve net zero carbon emission (operational and embedded carbon)
- To enhance the environment and increase biodiversity on our sites and areas we work by up to 50%



Between 2025 and 2030 we will:

Work with partners in the River Eden to enhance the environment, increase the resilience of our water supplies and improve biodiversity

Could do – investigations to identify nature-based solutions to improve water quality and water-based habitats
0.04%

Continue to improve biodiversity on 70% of the land we own

Could do – carry out work on or at our main sites to improve the way we manage the land to attract a wider range of species and wildlife
0.06%

Continue to become more energy efficient and where possible more to fully renewable sources for our energy needs

No bill impact

32. Environmental enhancement

We could take action to go beyond our statutory requirements (identified in the WINEP) and further enhance the environment and increase biodiversity.

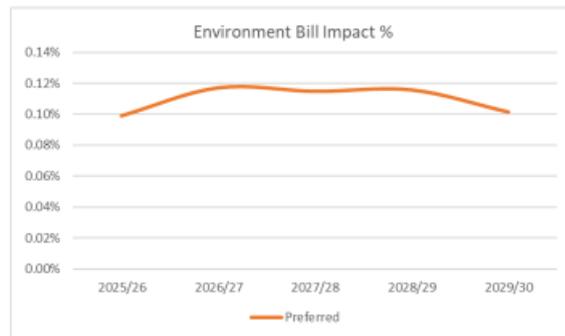
The Government has set a long-term target to increase biodiversity and support nature recovery.

Our preferred plan is:

- To investigate opportunities for nature-based solutions in the River Eden catchment during 2025 to 2030
- To deliver the solutions from 2030 onwards
- To carry out work on our own sites to increase biodiversity

Our must do plan is:

- No additional investment in this area



7.1.11 HH in vulnerable circumstance stimulus

1. Water companies in England and Wales

Water companies are regional: people have to receive water services from the company that covers where they live

- There are 11 water companies that provide **both water and sewerage services**
- There are also 5 companies that provide water services only – **SES Water is a water only company**
- Some households have two separate suppliers:
- e.g. people in SES Water's supply area receive **water services from SES Water** and **sewerage services from Thames Water or Southern Water**



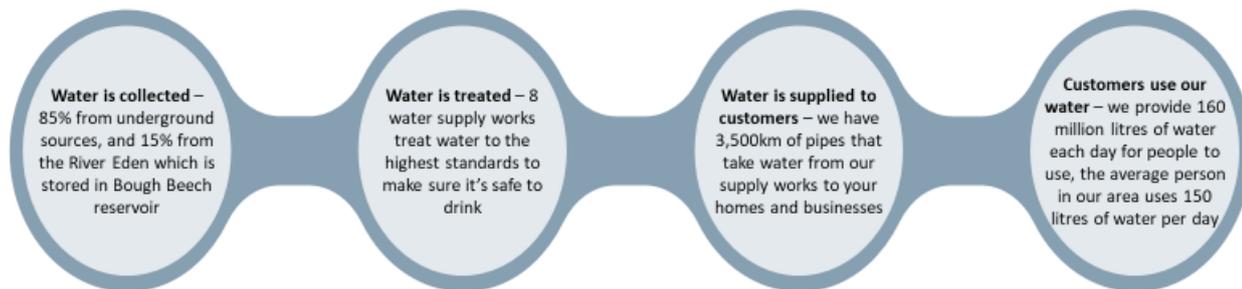
2. SES Water's supply area

- SES supply drinking water to 745,000 people and 8,000 businesses in parts of Surrey, West Sussex, Kent and South London
- Thames Water supply the wastewater services to the majority of our customers
- Southern Water supply the wastewater services to customers in the Kent area



3. What SES Water do

Water supply (SES Water):



Wastewater service (Thames Water)

- **Wastewater is removed** – wastewater is taken away from homes through a network of sewers and pumping stations
 - **Wastewater is treated** – wastewater treatment works clean the wastewater so that it can be safely returned to the environment
- **Customers are billed** – we bill customers for our water supply service and provide the bills on behalf of Thames Water for their wastewater service (if you are a Southern Water wastewater customer you will receive two bills)

4. The role of customers in a price review process



Every five years, water companies develop a 'business plan' that sets out how they want to develop their services, and the proposed cost to customers. As customers are not able to choose their water company, water companies must give them a say about what they want from their services and the price they pay. Talking to customers also helps water companies prioritise what to do first or what to do most of – because they are not able to fund everything they would like to do or do all of the things that customers might want them to do.

The business plan and prices are then finalised by Ofwat in a process known as the **Price Review**. There is more information about this here: 'All about the price review'. Available at: <https://www.youtube.com/watch?v=OWmivC93AF8>

One of the ways that people have their say is through this research, which will explain what the plans are for where you live, and ask what you think – whether the plans are 'acceptable' to you and whether you can afford the proposed bills from 2025-2030. Companies also have to show to Ofwat that their plans reflect what their customers want – that means refining the plans based on what customers tell them.

5. How water companies are monitored

Water companies are currently part way through their five-year business plan for 2020 to 2025. They have service level targets, called ‘performance commitments’, in every five-year business plan. These targets are based on what customers have previously told companies they would like them to do, and on Ofwat’s assessment of what companies should deliver. These targets cover a wide range of the different services that water companies provide.

Ofwat monitors water company performance against each performance commitment every year to see if they have met the service level in their business plan.

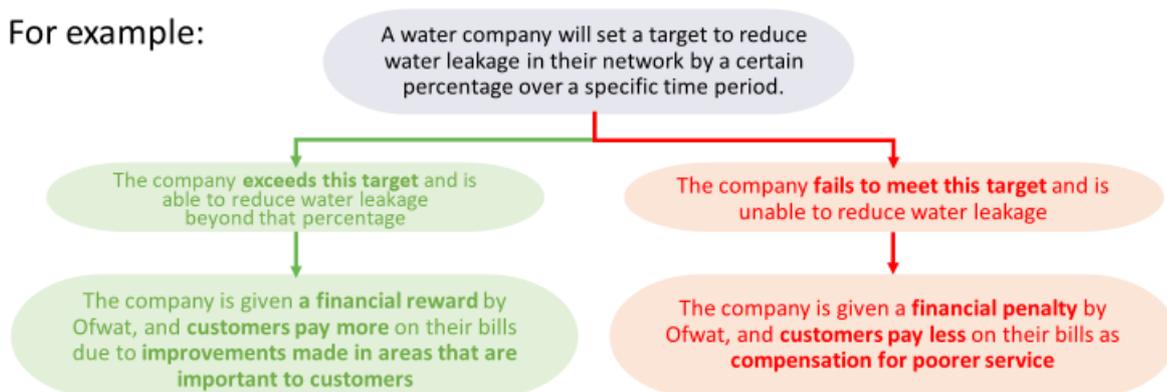
Water companies have to provide reliable services, and plan for their services to be resilient to changing weather patterns and demand from consumers. Companies can miss or exceed performance commitment targets for a number of reasons. For example, leaks from pipes happen more often after very cold weather, which can contribute to a company not meeting the target, and flooding from sewers is less likely in dry weather, which can lead to higher performance for sewer flooding service targets.



6. How water companies are monitored cont...

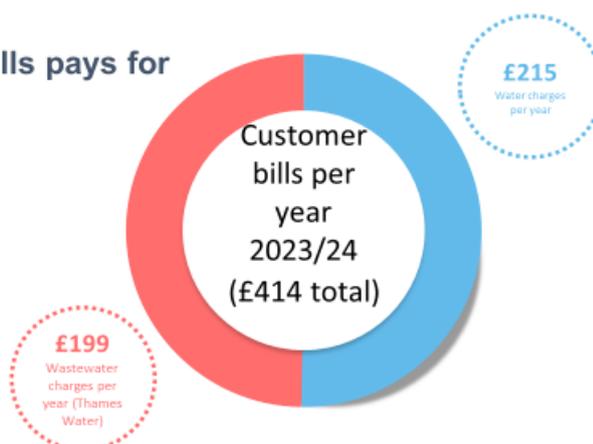
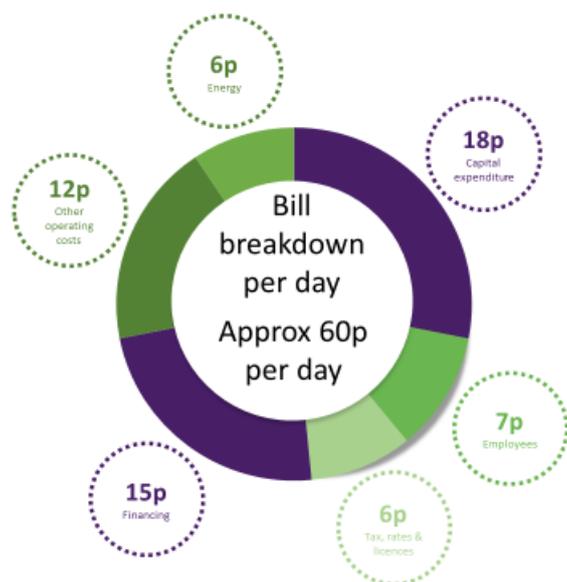
As part of their responsibility to provide clean and safe water to households and businesses, regulators set targets and performance standards for UK water companies. Outcome Delivery Incentives (ODIs) are a part of this framework and act as a system of financial rewards and penalties that are placed to encourage water companies to perform beyond their committed levels of service in order to benefit customers, the environment, and improve overall service.

For example:



Last year SES Water **passed 17** and **failed 8** performance commitment targets, costing them a penalty of £0.3m (equating to a £1.30 decrease on the average household bill)

10. What the money from customer bills pays for



Our average bill today is **£215 per year** – just over **60p per day**.

The average bill when combined with wastewater charges is **£414 per year** (Thames Water customers)

37. What does SES do for their customers

SES remains committed to delivering excellent customer service that is able to meet the needs of all of our customers. So what are we doing currently?



We carry out regular surveys with customers to understand how helpful our range of extra services are (both financial and non-financial). Last year 81% of customers who were on one of our extra services felt that they were helpful.

We also ask customers who aren't on them if they are aware of the support on offer. Currently, less than 40% of our customer base is aware of what is on offer, so we have more work to do. So what will we do?

• Community engagement

Our trained customer care team work in the community promoting the schemes and services on offer. This can be at community events, food banks, over 65 forums, family and children's centres as well as working with stakeholders and partners attending team briefings and open days.

We are also running research and have regular stakeholder sessions to ensure that the schemes design and access to it are suitable.

• Trusted partnerships

We have recently signed up our first trusted partner who will accept applications for our schemes on our behalf. Our new approach is intended to make the process of registering for our service and financial support schemes far simpler for our customers and this will also help increase awareness.

We'll work with the industry to share data about customers who require priority services with electricity and gas providers so that those that need extra help are identified and registered automatically with all their suppliers.

• Promotion

We will increase the communications we send out to our customers relating to the extra services on offer.



38. Financial support schemes

We offer a suite of schemes and discounts to support our customers who are struggling financially. Currently we have 20,100 households on one of these schemes and by the end of 2024 we will increase this to over 25,000. These schemes include:

Water Support

Water Support is a 50% bill reduction scheme funded by adding £6 to non-eligible customers' annual bills and underwritten by our shareholders who cover the remaining balance in excess of our customer contributions. Customers' eligibility for the scheme is based on their yearly gross household income. Less than £17,005 before any deductions, if they don't live in a London borough (£21,749 if they do live in a London borough).

Breathing Space

A way to pause payments for customers who need help getting back on their feet if they have experienced a change in certain personal circumstances that has had an unexpected negative impact on income; such as illness, redundancy or bereavement. We will pause payments for up to 3 months.

Direct Water Payments (third-party deductions)

Customers in receipt of certain benefits and have over £50.00 of debit on their account can combine their yearly bill with any other bill arrears into one weekly payment. This payment goes straight from their benefits. Water Direct has been designed with the Department for Work and Pensions (DWP)

Water Sure

A capped tariff for metered customers so they pay whichever bill is lower – the one based on their actual usage, or an average household bill. To qualify for this tariff customers need to be in receipt of certain benefits and have 3 children under 19 living with them or be suffering from or receiving treatment for a qualifying medical condition which means they need to use more water

For those customers who do not meet the qualifying criteria for our financial support schemes we offer flexible repayment plans. We are always willing to look at repayment of debt on an individual basis, depending on our customers financial situation.

39. Non-financial support schemes

Priority Services Register (PSR)

The PSR is free to join. It helps utility companies like us look after customers who have health, access or extra communication needs and helps us tailor our services to support households who need extra help.

The PSR includes a range of additional services we offer to make managing your account as easy as possible. We also offer extra support in the event of a water supply emergency. They include:

- Individual notification in emergencies
- Braille, large print and audio/CD services
- Text Relay Service
- Home dialysis users and patients convalescing at home
- Password scheme to protect from bogus callers
- Nominated correspondent to speak on your behalf
- Financial assistance depending on different eligibility criteria

Currently we have 20,500 customers on the PSR scheme and anticipate that by the end of 2024 this will have grown to 25,000.

Recite me Accessibility and Language toolbar

This tool allows customers to change the accessibility settings to help you get the most out of our website. It includes options to adjust the ruler, screen mask, magnifier, margins and a dictionary. The toolbar also quickly and easily translates all our web content into over 100 languages, including 35 text to speech voices.

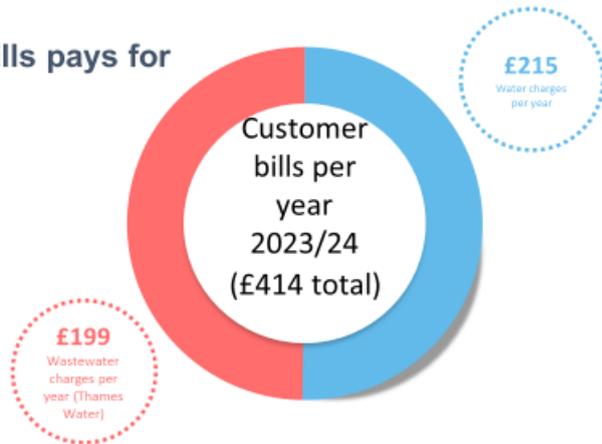
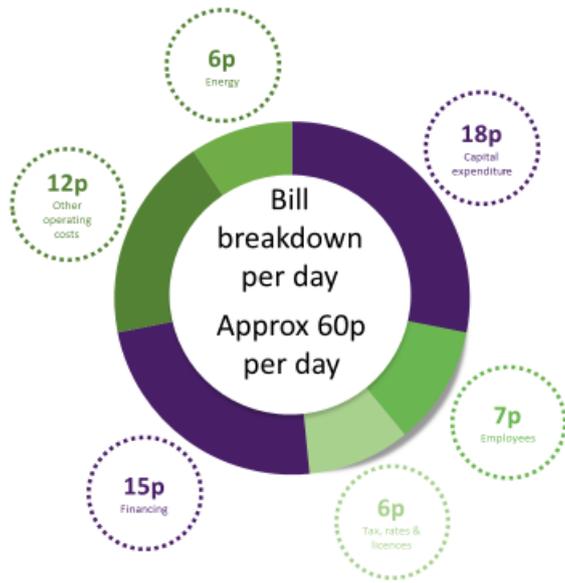
Over 600 customers a month use this tool to help them navigate our website.

Bereavement life ledger

We have partnered with LifeLedger a free service that allows customers to close, freeze, switch or transfer billing and service related accounts following a bereavement quickly and easily and from one place.



10. What the money from customer bills pays for



Our average bill today is **£215 per year** – just over **60p per day**.

The average bill when combined with wastewater charges is **£414 per year** (Thames Water customers)

<p>Provide you with high quality water from sustainable sources</p>	<p>Deliver a resilient water supply from source to tap</p>	<p>Help you reduce your water footprint and charge a fair price</p>	<p>Improve the environment and have a positive impact on our local area</p>
<ul style="list-style-type: none"> Continue to meet the highest quality standards by maintaining and investing in our water treatment works Work with farmers to stop nitrates and pesticides from entering our water sources Replace lead pipes that supply schools and nurseries Confirm where we need to reduce our existing abstractions to protect and enhance the chalk streams in our area 	<ul style="list-style-type: none"> Reduce leakage so only 9.5% of the water we supply is leaked - a 28% reduction since 2019/20 Use our smart network to help us find and fix leaks more quickly Target the replacement of old water mains Use smart meters to find leaks on customers' pipes and plumbing and help fix them This investment will also help us to maintain and reduce supply interruptions and main bursts 	<ul style="list-style-type: none"> Reduce our customers' water consumption by 20 litres to 131 litres per person per day Provide smart meters to households and businesses Use data from smart meters to help us provide customers with help and advice, targeting higher users Expand the impact of our education programme to embed the importance of water saving Develop our social tariff to help people struggling to pay 	<ul style="list-style-type: none"> Invest in schemes required by law to protect wildlife Work with partners to enhance the environment, increase resilience and improve biodiversity Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs Continue to improve biodiversity on 70% of the land we own Make more of our land accessible to the community

19. We will be showing you two plans

Preferred plan	Must do plan
<ul style="list-style-type: none"> This is the water company's proposed plan and includes extra work over and above what they are required by law to provide extra benefits to customers, the environment and local communities 	<ul style="list-style-type: none"> This plan allows water companies to carry out the work that they are required to do by law This is also the least cost plan

20. Areas of Investment

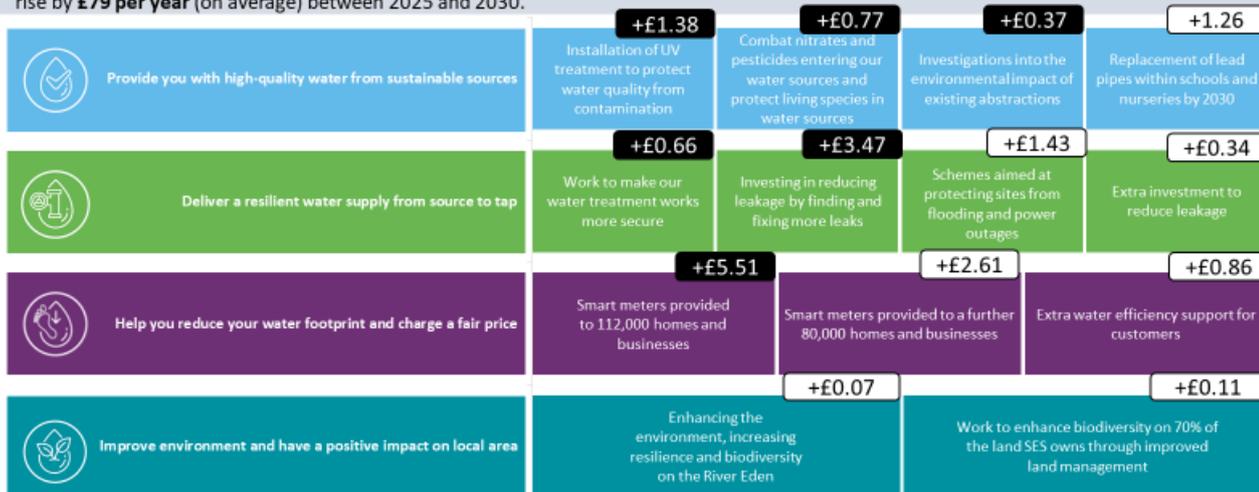
The average SES Water bill will be, on average, **£19** more per year between 2025 and 2030 if we deliver all the investments in our **preferred plan**, than in 2025

- £12 is to meet the higher standards required by law and regulation (black)
- £7 is to improve our performance over and above this (white) which are optional

The average combined bill when Thames Water's wastewater services are included will rise by **£79 per year** (on average) between 2025 and 2030.

£ Must do These are investments that SES must make.

£ Preferred plan i.e. could do These are discretionary investments. SES proposes these to achieve additional benefits for customers and the environment.



Figures shown do not include inflation

24. Water Industry National Environment Program

The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

Water companies have a programme of work to meet these laws, which includes:

- Reducing pollution of seas and rivers by sewage overflows.
- Not taking too much water from rivers and the ground.
- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- Treating water and wastewater to a standard that does not harm the natural environment.



Water companies must also meet legal requirements for the quality and safety of drinking water and protect reservoirs, treatment works and other sites to ensure they are safe and secure.

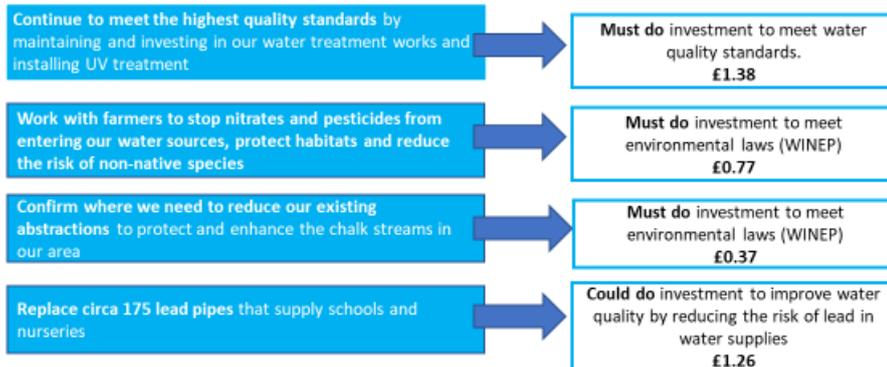


25. Provide you with high quality water from sustainable sources

- By 2050 our ambition is:**
- To have always provided you with high-quality water that meets the highest standards
 - To only use sources where we can take water without harming the environment



Between 2025 and 2030 we will:



26. Lead replacement

Drinking water containing high levels of lead can impact on health – particularly of young people

We add a chemical to water to protect water quality

We are required by law to replace lead pipes when high levels of lead are detected and we will replace SES lead pipes that supply customers' homes when customers replace their own supply pipes, and where supplies are shared with other properties

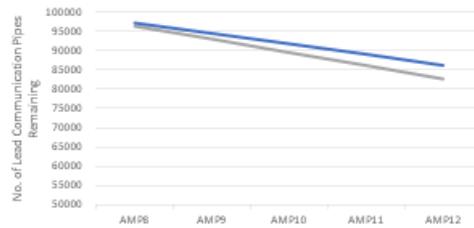
Our preferred plan is:

- To replace circa 175 lead pipes that supply colleges, schools and nurseries between 2025 and 2030
- After 2030 we will continue to proactively replace the lead pipes in our network and help customers to replace theirs

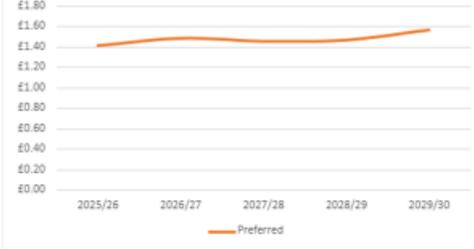
Our must do plan is:

- To continue with our current approach to replace lead pipes where high levels of lead are detected

Profile of remaining Lead Communication Pipes to end of AMP12



Lead Bill Impact £



27. Deliver a resilient water supply from source to tap

By 2050 our ambition is:

- For our water supplies to be resilient to climate change – including severe droughts
- For no-one to have their water supply interrupted for more than 3 hours
- For less than 5% of water we produce to be leaked from our pipes and yours



Between 2025 and 2030 we will:

Protect our water treatment works from climate change and other external threats and events

Must do – to meet new security regulations
£0.66

Could do – to protect sites from climate change and power outages
£1.43

Reduce leakage by 19% by finding and fixing leaks more quickly, replacing old water mains and using smart meters to find leaks on customers' pipes and plumbing

Must do – reduce leakage by finding and fixing more leaks
£3.47

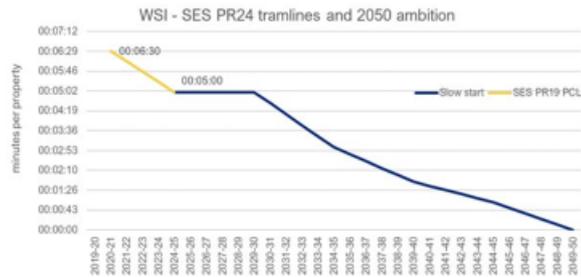
Could do – manage pressure to reduce leaks further
£0.34

Maintain our current performance for supply interruptions at less than 5 mins per year

No bill impact

28. Supply interruptions

- SES Water currently perform well in this area (less than 5 minutes of supply interruptions per household per year)
- Our preferred plan is to maintain performance over the next 5 years
- Beyond 2030 we will continue to invest in this area through replacing old water mains
- Our long-term target is for there to be no supply interruptions longer than 3 hours
- There will be no impact on bills between 2025 and 2030



29. Resilience

External factors can impact on our service.

We must meet statutory security requirements to make sure our drinking water sources are protected.

Other factors such as climate change and interruptions to power supplies could result in water treatment and production temporarily being stopped.

Our preferred plan:

- Increase the security of our sites in line with statutory requirements
- Carry out work to protect one of our water supply sites from flooding from the nearby River Mole – this has been identified by our work to look at the long-term impact of climate change
- Protect our sites from short term power outages by installing equipment that will automatically switch to standby generators to stop sites from shutting down

Our must do plan:

Increase the security of our sites in line with statutory requirements

30. Leakage reduction

22 million litres water per day is currently leaked from SES Water's pipes (70%) and customers' pipes (30%)

This is 13% of the water that is treated and put into supply each day.

The Government target is to reduce leakage by 50% by 2050 (from 2017/18 levels)

SES Water want to achieve the 50% reduction ahead of the Government target

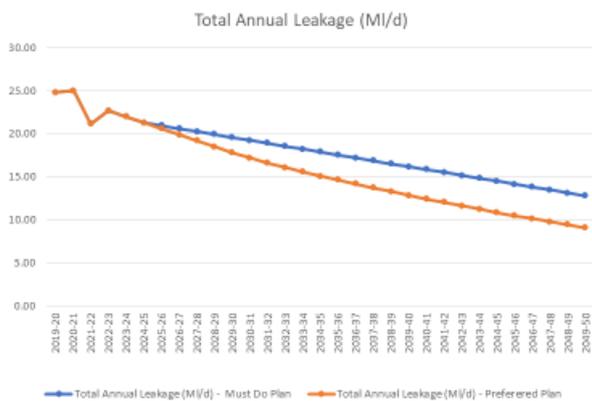
Our preferred plan is:

- To use our smart network to help find more leaks and repair them more quickly
- Roll out smart meters to all our customers to help us detect customer-side leaks and help fix them
- From 2030 we will start replacing old water mains to reduce the risks of leaks occurring
- **50% leakage reduction will be achieved by 2040**

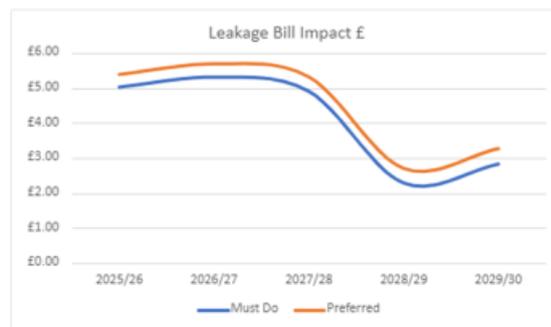
Our must do plan is:

- To use our smart network to help find more leaks and repair them more quickly
- Roll our smart meters help us detect customer-side leaks and help fix them – fewer meters will be installed under our must do plan so leakage will not fall as quickly
- **50% leakage reduction will be achieved by 2050**

31. Leakage reduction



- Preferred plan – 65% leakage reduction by 2050
- Must do plan – 50% leakage reduction by 2050





33. Help you reduce your water footprint and charge a fair price

By 2050 our ambition is:

- To reduce household water consumption to 110 litres per person per day and business consumption by 15%
- To eliminate water poverty so no customers spend more than 5% of disposable income on water



Between 2025 and 2030 we will:

Help reduce household water consumption to 131 litres per day by installing more smart meters (15,000 will be in place by 2025) and provide customers with help and advice, targeting higher users

Reduce non-household water consumption by 15% by providing smart meters

We will continue to provide a social tariff and additional support to customers with financial difficulties

Must do – we will provide 112,000 smart meters to homes and businesses
£5.51

Could do – we will provide an extra 80,000 smart meters to homes and businesses and provide extra water efficiency support
£2.61
£0.86

34. Smart meters

SES Water customers currently use circa **150 litres** of water per person per day

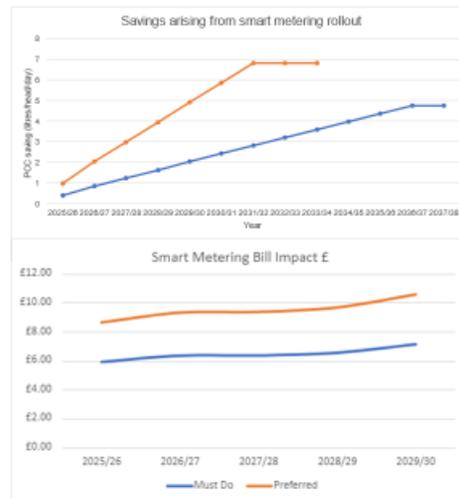
The Government target is:

- For household customers to use **110 litres per person per day by 2050** – a reduction of 40 litres per person
- For business customers to reduce their usage by 15% by 2050

Smart meters provide more information on how much water is being used and where. The data they produce will enable more targeted water efficiency support to be provided to customers.

Our preferred plan is:

- To provide smart meters to all our household and business customers by 2032 – 192,000 meters between 2025 and 2030 with enhanced technology
- To provide extra water efficiency advice to help target the highest users
- It will also contribute to greater leakage reduction



Our must do plan is;

- To provide smart meters to all our household and business customers by 2037 – 112,000 between 2025 and 2030
- The remaining 80,000 meters will be installed between 2030 and 2037.



35. Improve the environment and have a positive impact on our local area

By 2050 our ambition is:

- To achieve net zero carbon emission (operational and embedded carbon)
- To enhance the environment and increase biodiversity on our sites and areas we work by up to 50%



Between 2025 and 2030 we will:

Work with partners in the River Eden to enhance the environment, increase the resilience of our water supplies and improve biodiversity

Could do – investigations to identify nature-based solutions to improve water quality and water-based habitats
£0.07

Continue to improve biodiversity on 70% of the land we own

Could do – carry out work on or at our main sites to improve the way we manage the land to attract a wider range of species and wildlife
£0.11

Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs

No bill impact

36. Environmental enhancement

We could take action to go beyond our statutory requirements (identified in the WINEP) and further enhance the environment and increase biodiversity.

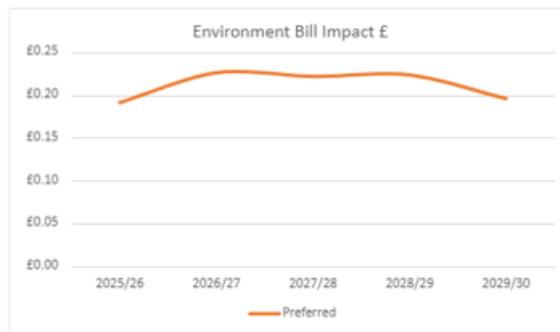
The Government has set a long-term target to increase biodiversity and support nature recovery.

Our preferred plan is:

- To investigate opportunities for nature-based solutions in the River Eden catchment during 2025 to 2030
- To deliver the solutions from 2030 onwards
- To carry out work on our own sites to increase biodiversity

Our must do plan is:

- No additional investment in this area

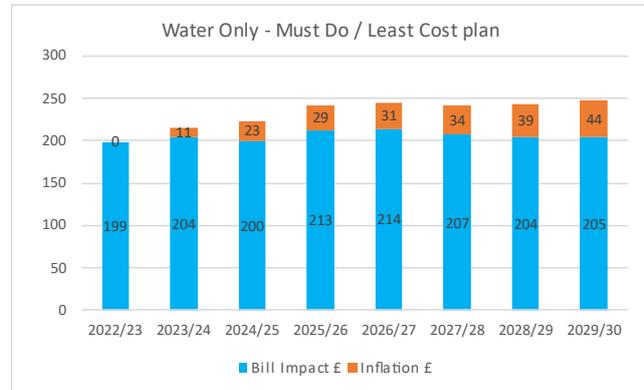
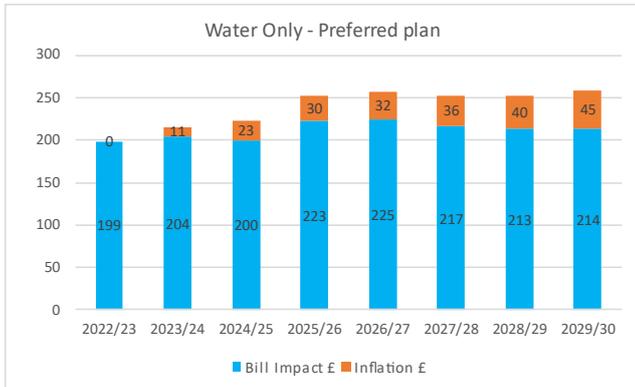


7.1.12 Post task

SES Water Workshop Post-task

Thank you for your participation in this focus group for SES Water. Before we finish, we have a few more questions to ask you, as was mentioned when we first contacted you about participating. This post-task should take around 5 minutes to complete.

Affordability



S ASK BILL-PAYERS

Q1. Thinking about how your income may change in the future, how easy or difficult do you think it would be for you to afford these water bills?

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Don't know

S ASK BILL-PAYERS

Q2. Based on everything you have heard and read about SES's proposed business plan, how acceptable or unacceptable is it to you?

1. Completely acceptable
2. Acceptable
3. Unacceptable
4. Completely unacceptable
5. Don't know/can't say

M ASK IF Q2 = 3 OR 4, RANDOMISE, SELECT 2

Q3. Why do you say that? Please select the **TWO** main reasons from the list below or write your own reason(s) if they are not on the list.

1. Too expensive
2. Water company profits too high
3. The plan won't improve things enough/improvements too small
4. Water companies should pay for more of these service improvements out of their profits

5. The plan is poor value for money – it's not doing enough for the cost
6. The plan doesn't focus on the right things
7. I won't be able to afford this
8. I don't trust them to make these service improvements
9. Plan isn't good enough for future generations
10. I don't trust them to do what's best for their customers
11. Plan is not environmentally friendly enough
12. Other 1 – (please specify) **FIXED**
13. Other 2 – (please specify) **FIXED**

M ASK IF Q2 = 1 OR 2, RANDOMISE, SELECT 2

Q4. Why do you say that? Please select the TWO main reasons from the list below or write your own reason(s) if they are not on the list.

1. It's not too expensive
2. The plan is good value for money – it's doing a lot for the cost
3. Their plan focuses on the right things
4. I trust them to do what's best for their customers
5. The plan will make big/good improvements to things
6. I trust them to make these service improvements
7. Plan is environmentally friendly
8. I will be able to afford this
9. Plan is good for future generations
10. Other 1 – (please specify) **FIXED**
11. Other 2 – (please specify) **FIXED**

S ASK ALL

Q5. Of the business plans you have seen today, which one do you prefer overall?

1. The preferred plan
2. The least cost "must do" plan

O ASK ALL

Q5. Why did you say that?

S ASK ALL

Q7. Long-term investment by SES will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?

1. An increase in bills starting sooner, spreading increases across different generations of bill-payers
2. An increase in bills starting later, putting more of the increases onto younger and future bill-payers
3. I don't know enough at the moment to give an answer

S ASK ALL

Q8. To what extent, if at all, do you trust SES to deliver their proposed plan by 2030?

1. I trust them to deliver it all
2. I trust them to deliver some of it
3. I trust them to deliver a little of it

- I don't trust them to deliver it

M ASK IF Q8 = 1 OR 2, RANDOMISE, SELECT 2

Q9. Why do you say that? Please select the TWO main reasons from the list below:

- They give me a good service
- Their services are good value for money
- They keep their service promises to their customers
- They don't update their customers on how they are delivering
- Their customers are their top priority
- Other 1 – (please specify) **FIXED**
- Other 2 – (please specify) **FIXED**

M ASK IF Q8 = 3 OR 4, RANDOMISE, SELECT 2

Q10. Why do you say that? Please select the TWO main reasons from the list below:

- They don't give me a good service
- Their services are poor value for money
- Shareholders are more important to them than customers
- They will want to put their bills up by more than this
- Other 1 – (please specify) **FIXED**
- Other 2 – (please specify) **FIXED**

S ASK ALL

Q11. How easy, or otherwise, was it for you to decide which plan you preferred?

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult

7.2 Quantitative materials

7.2.1 Invitation letter

Dear [customer_name],

SES Water needs your help with some important decisions that they will be making, which will affect your household/business and the bills you pay for your clean water services from 2025 to 2030.

All water companies are making plans for what investments are needed to make sure customers have secure, reliable, and high-quality water services for today and in the future.

It is conducting a survey to understand your views on potential future investments, and is important because all investment is paid for through customer bills. Your feedback will be used by SES Water to inform its business plan for the five years, 2025-2030.

It will take about 10 minutes to complete the survey, and as a thank you for your time, you will receive a £5 Amazon gift voucher, or charity donation if you would prefer. Full details of how to redeem this incentive are given in the survey. Please note the incentive will be paid once the survey when the survey is closed, no later than the end of August 2023.

The survey can be completed online, by clicking the following link, or alternatively copying and pasting it into your web browser. This can be done using a laptop, PC, tablet or mobile device.

[WEB LINK]

Alternatively, if you do not have internet access, but would still like to participate in the research, we can offer a postal survey. To do this, please reply to this letter stating you would like to take part, with your full name and address to the address below. You will then be sent a paper version of the survey with instructions on how to complete and send it back.

Steve Morley
Impact Research Ltd
3 The Quintet
Churchfield Road
Walton-on-Thames
Surrey
KT12 2TZ

When completing the survey, you will be prompted to enter your annual bill amount. For you, this is: **£x**.

Further information

This study is being carried out by Impact Research, an independent market research company, working in partnership with SES Water.

This is a genuine market research study and no sales call will result from our contact with you. The survey will be carried out in strict accordance with the Market Research Society's Code of Conduct and GDPR.

If you require any further information about how Impact store and use the data you provide, please see their privacy policy: <https://www.impactmr.com/privacy-statement-research>

If you have any queries, you can contact Impact Research Ltd on 01932 226 793 and ask for a member of the Utilities team. If you wish, you may also confirm their credentials by contacting the Market Research Society on 0800 975 9596.

Thank you in advance.

Kind regards,

Steve Morley

Associate Director

Impact Research Ltd

3 The Quintet, Churchfield Road, Walton-on-Thames, KT12 2TZ, UK

7.2.2 Invitation email

Dear [customer_name],

SES Water needs your help with some important decisions that they will be making, which will affect your household/business and the bills you pay for your clean water services from 2025 to 2030.

All water companies are making plans for what investments are needed to make sure customers have secure, reliable, and high-quality water services for today and in the future.

It is conducting a survey to understand your views on potential future investments, and is important because all investment is paid for through customer bills. Your feedback will be used by SES Water to inform its business plan for the five years, 2025-2030.

It will take about 10 minutes to complete the survey, and as a thank you for your time, you will receive a £5 Amazon gift voucher, or charity donation if you would prefer. Full details of how to redeem this incentive are given in the survey.

The survey can be completed online, by clicking the following link, or alternatively copying and pasting it into your web browser. This can be done using a laptop, PC, tablet or mobile device.

[WEB LINK]

Alternatively, if you do not have internet access, but would still like to participate in the research, we can offer a postal survey. To do this, please reply to this letter stating you would like to take part, with your full name and address to the address below. You will then be sent a paper version of the survey with instructions on how to complete and send it back.

Steve Morley
Impact Research Ltd
3 The Quintet
Churchfield Road
Walton-on-Thames
Surrey
KT12 2TZ

When completing the survey, you will be prompted to enter your annual bill amount. For you, this is: £x.

Further information

This study is being carried out by Impact Research, an independent market research company, working in partnership with SES Water.

This is a genuine market research study and no sales call will result from our contact with you. The survey will be carried out in strict accordance with the Market Research Society's Code of Conduct and GDPR.

If you require any further information about how Impact store and use the data you provide, please see their privacy policy: <https://www.impactmr.com/privacy-statement-research>

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Thank you in advance.

Kind regards,

Steve Morley

Associate Director

Impact Research Ltd

3 The Quintet, Churchfield Road, Walton-on-Thames, KT12 2TZ, UK

7.2.3 Quantitative survey

Online survey

July 2023

HIDSAMPLE - separate links

1. HH (Online)
2. NHH (RTO)

SHOW ALL, INTRODUCTION TO THE RESEARCH AND ADHERENCE TO MRS CODE OF CONDUCT AND GDPR IF ONLINE SURVEY:

Thank you again for being part of this survey.

This short research survey is being run by Impact, an independent market research agency on behalf of SES Water. This survey will cover questions concerning your water service and bills.

This is a genuine market research study. No sales call will result from our contact with you and your details will not be forwarded or used by anyone else as a result of your participation. The interview will be carried out in strict accordance with the Market Research Society's Code of Conduct.

By clicking the Next button, you confirm that you have read the information below and agree to participate in this survey.

Start survey

If you require any further information about how we store and use the data you provide, please see our privacy policy on our website: <https://www.impactmr.com/privacy-statement-research>

Would you like to write down our telephone number should you have any queries?
You can contact us on 01932 226 793 and ask for a member of the Utilities team.

SCREENER HH ONLINE

S ASK ALL HH, NUMERICAL, MAX 115

S1 How old are you?

1. Please enter your age: [OPEN RESPONSE]
2. Prefer not to say

THANK AND CLOSE

IF S1<18 THANK AND CLOSE

AUTOMATICALLY CODE INTO AGE BRACKETS AS FOLLOWS:

1. 18-24
2. 25-34
3. 35-44
4. 45-54
5. 55-64
6. 65-74
7. 75+

S ASK ALL HH

S2 Are you solely or jointly responsible for paying your household's water bill?

1. Yes

2. No, I am not responsible for paying the bill **THANK AND CLOSE**
3. Don't know **THANK AND CLOSE**

S ASK ALL HH

S3 Are you currently charged for water through a water meter?
Please select one answer only

1. Yes
2. No
3. Don't know

S ASK ALL HH

S4 SES is your water company and either Thames Water or Southern Water is responsible for your sewerage services. Does this sound right?
Please select one answer only

1. Yes
2. No
3. Don't know

THANK AND CLOSE

SCREENER NHH

S ASK ALL NHH ONLY

NS1 Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

1. Yes
2. No

THANK AND CLOSE

S ASK IF NS1=1 NHH ONLY

NS2 Is this business run from a business premises or from somewhere else, e.g., a home residence or a mobile business?

1. Business premises
2. No fixed business premises (e.g., van/home residence)

S ASK IF NS2=2 NHH ONLY

NS3 Just to clarify, so your organisation DOESN'T have ANY OTHER main premises?

1. No other main business premises **THANK AND CLOSE**
2. There are other main business premises other than my/someone else's home

S ASK IF NS2=2 NHH ONLY

NS3 Can I check whether your organisation is responsible for making decisions about and paying for water utilities, or whether someone other than the organisation, such as the landlord or management company, is responsible for this?

1. Organisation makes its own decisions about utilities
2. Decision about utilities are made by a third party, e.g. landlord **THANK AND CLOSE**

O ASK ALL NHH ONLY

NS5a Please enter your name.

Please note this, and the two subsequent, questions are asked to ensure this survey is only completed by no more than one employee from within each organisation. Your response will not be tied to you personally in any way.

1. Refused **THANK AND CLOSE**

O ASK ALL NHH ONLY

NS5b Please enter your job title.

1. Refused **THANK AND CLOSE**

O ASK ALL NHH ONLY

NS5b Please enter the name of your organisation.

1. Refused **THANK AND CLOSE**

BILL ROUTING

O ASK HH ONLY, NUMBER ONLY, ALLOW 0-99999

B1 In the email/letter you were sent inviting you to take part, we included a figure for your individual annual water and wastewater bill. Please could you input this figure into the field below. This is important as it will allow us to personalise the questionnaire so it is most relevant to you.

£ [OPEN RESPONSE]

O ASK NHH ONLY, NUMBER ONLY, ALLOW 0-99999

B2 Are you aware of your current organisations annual water and wastewater bill. If so, please could you input this figure into the field below. This is important as it will allow us to personalise the questionnaire so it is most relevant to you.

£ [OPEN RESPONSE]

1. Don't know

AFFORDABILITY

INFO SCREEN: Thank you. We are now going to ask you some questions about your [HH: household's, NHH: organisation's] financial situation.

S ASK ALL RANDOMISE REVERSING ORDER OF CODES 1-5 (KEEP ORDER THE SAME BUT REVERSE LIST FOR HALF OF SAMPLE, EXPECT CODE 6)

A1 Thinking about your [HH: household's, NHH: organisation's] finances over the last year, how often, if at all, [HH: have you, NHH: has your organisation] struggled to pay at least one of [HH: your household bills, NHH: its bills]?

Please select one answer only

1. All of the time
2. Most of the time
3. Sometimes
4. Rarely
5. Never
6. Prefer not to say **FIXED**

S **ASK ALL , RANDOMISE REVERSING ORDER OF CODES 1-5**

A2 Overall, how well would you say [HH you are] [NHH your organisation is] managing financially now?
Please select one answer only

1. [HH: Living comfortably] [NHH: Doing well]
2. Doing alright
3. Just about getting by
4. Finding it quite difficult
5. Finding it very difficult
6. Prefer not to say **FIXED**

S **ASK ALL, RANDOMISE REVERSING ORDER OF CODES 1-5**

A3 Thinking about your [HH household's] [NHH organisation's] financial situation over the next few years up to 2030, do you expect it to get:
Please select one answer only

1. A lot worse
2. A bit worse
3. Stay the same
4. A bit better
5. A lot better
6. Prefer not to say **FIXED**
7. Don't know **FIXED**

S **ASK ALL, RANDOMISE REVERSING ORDER OF CODES 1-5**

A4 **THIS LINE HH ONLY** Your current water and bill is [ROUTE ANSWER FROM B1]

How easy or difficult is it for [HH you] [NHH: your company/organization] to afford to pay your current water bill:

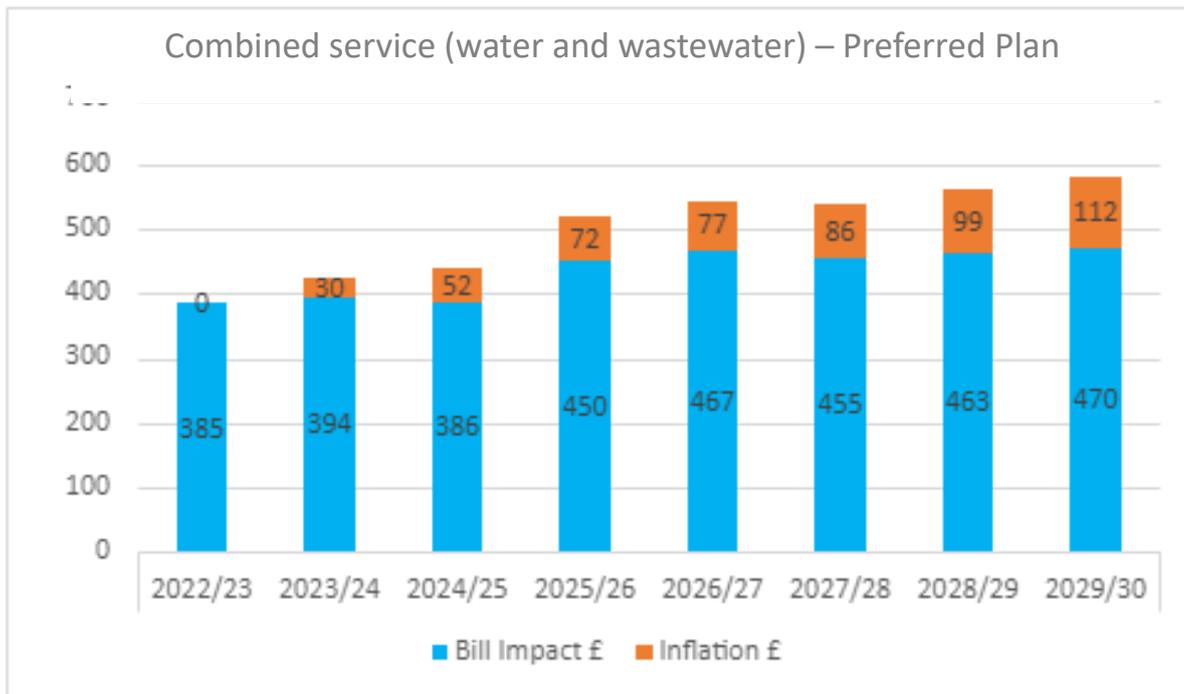
Please select one answer only

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Don't know **FIXED**

[HH ONLY] ADD TIMESTAMP, ADD ZOOM FUNCTION

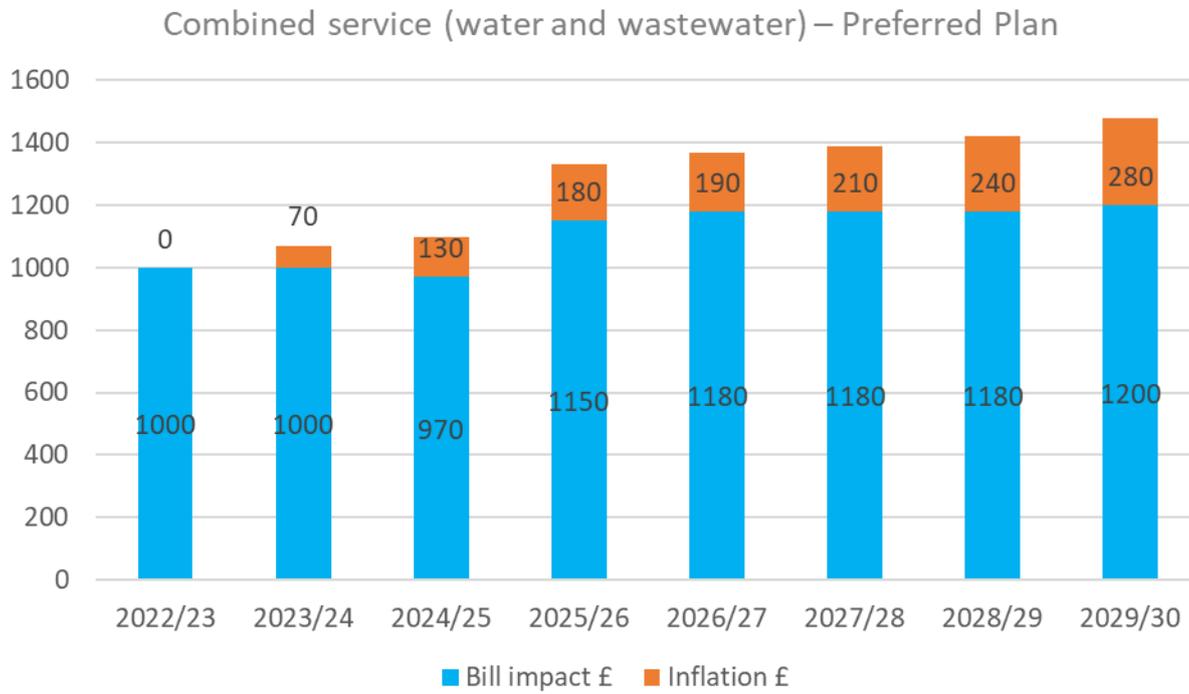
INFO SCREEN: The next set of questions are about proposed changes to your water and sewerage bills (i.e., your combined bill from SES Water for your clean water and from Thames Water for your wastewater bill) for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Please note the chart shows the figures for an average annual bill for a customer in SES's region, but please consider your own bill of [ROUTE ANSWER FROM B1] when answering this question. If your bill is currently above the average bill of £414 for 2023/2024, it is likely that your bill will increase by a larger value than is shown on screen, but if it is lower, then it is likely to increase by a smaller value.



NHH ONLY: ADD TIMESTAMP, ADD ZOOM FUNCTION

Please note the chart shows the figures for an example annual bill of £1,000 in SES's region. If your bill is currently above £1,000 per year, it is likely that your bill will increase by a large value than is shown on screen, but if it is lower, then it is likely to increase by a smaller value.



S **ASK ALL, RANDOMISE REVERSING ORDER OF CODES 1-5**

A5 How easy or difficult do you think it would be for [HH:you] [NHH: your company/organisation] to afford these water bills?

IF NHH & BILL IS NOT KNOWN B2=1: How easy or difficult do you think it would be for your organization to afford its water bills if they went up at the same rate?

Please select one answer only

1. Very easy
2. Fairly easy
3. Neither easy nor difficult
4. Fairly difficult
5. Very difficult
6. Don't know

FIXED

M **ASK IF HH & A5=3, 4 OR 5, RANDOMISE**

A6 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

Select all that apply

1. Shopping around more
2. Spending less on food shopping and essentials
3. Spending less on non-essentials
4. Cutting back on non-essential journeys in my vehicle
5. Eating out less
6. Using less fuel such as gas or electricity in my home
7. Using less water
8. Using my savings
9. Using credit more than usual, for example, credit cards, loans or overdrafts
10. Ask family and friends for financial support
11. Other *Please specify*
12. Don't know

FIXED

FIXED

Acceptability

INFO SCREEN, SHOW ALL: Thank you. We are now going to ask you some questions about your views on [HH: your water company's business plan, NNH: the business plan of the water wholesaler SES Water]. Water companies are required to put together business plans for each five-year period. The plan we are showing you is for 2025- 2030.

First, we have a number of tables showing SES Water's performance levels on a number of areas compared to other water companies in England and Wales. Please look through this data, taking note of SES Water's (highlighted in a different colour) performance in relation to other water companies. In all instances, those marked in green are performing at or better than their target, or the industry average.

Please take your time to read through the information carefully, making sure you understand what is being shown before moving on to the next screen. Please use the zoom function to view the tables, if you are having trouble reading them.

NEXT PAGE, TABLE1, ADD 20 SECOND TIME DELAY, ADD ZOOM FUNCTION

This table shows the **number of times [HH: houses, NHH: premises] have had their water interrupted without warning for longer than 3 hours** over the 2021-2022 period. **Minus numbers on the table are better** as they show that fewer interruptions without warning are occurring. **SES Water is performing 3rd** for least interruptions without warning compared to other companies on this graph.

Water Supply Interruptions, without warning, for longer than 3 hours		
If a water supply is interrupted without warning for greater than 3 hours, it would not be possible to draw water from the taps or flush the toilet; it may be necessary to buy bottled water.		
Companies with the <i>lowest</i> numbers perform best for this service.		
SES Water met its target for this metric last year		
In 2021-2022 SES Water performed 3rd out of 17 companies overall on this measure.		
Water and Sewage Company	Performance against target (%)	
Portsmouth*	-62%	Better performance 
Bristol*	-59%	
SES Water*	-52%	
South Staffs and Cambridge*	-47%	
Affinity*	-39%	
Wessex	-32%	
South West	+11%	 Poorer performance
United Utilities	+30%	
Southern	+53%	
Anglian	+60%	
Yorkshire	+73%	
Thames	+80%	
Northumbrian and Essex & Suffolk	+92%	
Severn Trent	+106%	
Dŵr Cymru Welsh Water	+164%	
Hafren Dyfrdwy	+511%	
South East*	+1083%	
* Water only company		

NEXT PAGE, TABLE2, ADD 20 SECOND TIME DELAY, ADD ZOOM FUNCTION

The next table shows the **number of times customers have contacted SES concerning water taste, smell or appearance issues** over the 2021-2022 period. **Smaller numbers on table are better**, as that means less customers are contacting SES water concerning their water taste, smell and appearance.

While SES Water are not meeting their target for this measure, they are still performing 3rd overall for the least number of contacts compared to other companies.

Taste, smell, and appearance of water		
Tap water may taste/smell/look different to usual. Although still safe to drink, people may prefer bottled water as a precaution until it returns to normal.		
Companies with the <i>lowest</i> numbers perform best for this service.		
SES Water did not meet its target for this metric last year		
In 2021-2022 SES Water performed 3 rd out of 17 companies overall on this measure.		
Water and Sewage Company	Contacts per 1,000 population	
Portsmouth*	0.41	<p>Better performance</p>   <p>Poorer performance</p>
Thames	0.49	
SES Water*	0.58	
Affinity*	0.73	
South Staffs and Cambridge*	0.76	
Severn Trent	0.93	
Northumbrian	0.97	
Anglian	1.03	
Yorkshire	1.09	
Southern	1.1	
Wessex	1.17	
South East*	1.34	
Bristol*	1.38	
South West	1.55	
Hafren Dyfrdwy	1.71	
United Utilities	1.79	
Dwr Cymru Welsh Water	2.38	
* Water only company		

NEXT PAGE, TABLE3, ADD 20 SECOND TIME DELAY, ADD ZOOM FUNCTION

This table shows the **number of litres lost from water mains or pipe leaks** over the previous 3 year period. **Minus numbers on the table are better** as they show that less leakage. **SES Water is performing 5th** for least amount of water lost due to leakages.

Reducing leaks		
Leaks can affect customers directly if their water supply is affected. They are sometimes unnoticed if underground. But leakage is often seen in the media and has a cost to people on their bills and a cost to the environment.		
Companies with the <i>lowest</i> numbers perform best for this service		
SES Water met its target for this metric last year		
In 2021-2022 SES Water performed 5 th out of 17 companies overall on this measure.		
Water and Sewage Company	Performance against target	
Cambridge*	-9%	<p style="text-align: center;">Better performance</p>  <p style="text-align: center;">Poorer performance</p> 
Wessex	-7%	
Portsmouth*	-6%	
Hafren Dfrdwy	-5%	
SES Water*	-3%	
South east	-3%	
United Utilities	-3%	
South Staffs	-2%	
Dŵr Cymru Welsh Water	-1%	
Severn Trent	-1%	
Yorkshire	-1%	
Anglian	+/-0%	
Bristol	+/-0%	
South West & Bournemouth	+/-0%	
Thames	+/-0%	
Affinity	+1%	
Southern	+1%	
Northumbrian and Essex & Suffolk	+3%	
* Water only company		

NEXT PAGE, TABLE4, ADD 20 SECOND TIME DELAY, ADD ZOOM FUNCTION

The final table shows the **daily water usage from each water company per customer served**. **Minus numbers on the table are better** as they show that less water is being used. **SES Water is performing 12th** in terms of daily water usage per customer.

Per Capita Consumption		
An increasing population means extra demand for water while increasingly erratic weather patterns could lead to more droughts in the future. It is more important than ever for everyone to take care how they use water.		
Companies with the <i>lowest</i> numbers perform best for this service.		
SES Water performed worse than the industry average over the previous 3 years		
In this period SES Water performed 12th out of 18 companies overall on this measure.		
Water and Sewage Company	Performance against target (litres)	
Yorkshire	-17	 Better performance
Severn Trent	-13	
Southern	-11	
Anglian	-6	
Cambridge*	-5	
South Staffs	-3	
Southern west and Bournemouth	-3	
Hafren Dfwdwy	-2	
Wessex	+/-0	
United Utilities	+1	
Thames	+3	
SES Water*	+8	
Bristol*	+9	
South East*	+11	
Northumbrian and Essex & Suffolk*	+13	
Portsmouth*	+15	
Affinity*	+17	
Dŵr Cymru Welsh Water	+24	
* Water only company		

NEXT PAGE, TABLE 5, ADD 30 SECOND TIME DELAY, ADD ZOOM FUNCTION

SES Water is currently developing its 2025-2030 business plan. This has been developed in line with the company's current performance on the key metrics laid out above. If all of the preferred investments are delivered upon, the average SES Water bill can be expected to be [HH: £14, NHH: 7.04%] more per year, on average, between 2025 and 2030.

Below are the four key investment areas which SES Water will be basing its 2025-2030 investments on, as well as its specific aims within these investment areas.

			
Provide you with high quality water from sustainable sources	Deliver a resilient water supply from source to tap	Help you reduce your water footprint and charge a fair price	Improve the environment and have a positive impact on our local area
<ul style="list-style-type: none">• Continue to meet the highest quality standards by maintaining and investing in our water treatment works• Work with farmers to stop nitrates and pesticides from entering our water sources• Replace lead pipes that supply schools and nurseries• Confirm where we need to reduce our existing abstractions to protect and enhance the chalk streams in our area	<ul style="list-style-type: none">• Reduce leakage so only 9.5% of the water we supply is leaked - a 28% reduction since 2019/20• Use our smart network to help us find and fix leaks more quickly• Target the replacement of old water mains• Use smart meters to find leaks on customers' pipes and plumbing and help fix them• This investment will also help us to maintain and reduce supply interruptions and main bursts	<ul style="list-style-type: none">• Reduce our customers' water consumption by 20 litres to 131 litres per person per day• Provide smart meters to households and businesses• Use data from smart meters to help us provide customers with help and advice, targeting higher users• Expand the impact of our education programme to embed the importance of water saving• Develop our social tariff to help people struggling to pay	<ul style="list-style-type: none">• Invest in schemes required by law to protect wildlife• Work with partners to enhance the environment, increase resilience and improve biodiversity• Continue to become more energy efficient and where possible move to fully renewable sources for our energy needs• Continue to improve biodiversity on 70% of the land we own• Make more of our land accessible to the community

NEW PAGE

We will now ask you which elements of the current business plan are the most important to you relating to current investments and intended future investments in the next business plan.

You will be asked one question relating to each area of the business plan, as shown on the previous screen. Please take your time to read through the information carefully, before selecting which part of the business plan is most important to you. For each option, you will see how much, on average, it will add to your overall annual bill. Please use the hover over text provided for each option, which gives further explanation about the work SES Water would do.

S ASK ALL, RANDOMISE

Q7a Based on what you have seen up until this point, which of these three parts of the business plan is the most important to you relating to the *provision of high-quality water from sustainable sources*?
Please select one answer only

1. **Installation of UV treatment to protect water quality from contamination.** Estimated annual cost to the average customer bill: [HH: +£1.73, NHH: +0.87%] to the average customer bill *Hover over text: Continue to meet the highest water quality standards by maintaining and investing in our water treatment works and installing UV treatment*

2. **Stopping nitrates and pesticides entering our water sources and protecting living species in water sources.** Estimated annual cost: [HH: +£0.93, NHH: +0.47%] to the average customer bill *Hover over text: Work with farmers to stop nitrates and pesticides from entering our water sources, protect habitats and reduce the risk of non-native species spreading*
3. **Replacing lead pipes within schools and nurseries by 2030.** Estimated annual cost: [HH: +£0.97, NHH: +0.49%] to the average customer bill *Hover over text: To replace circa 175 lead pipes that supply colleges, schools and nurseries between 2025 and 2030 to target places where customers who could be most impacted by lead in drinking water are*
4. Don't know/can't say FIXED

S ASK ALL, RANDOMISE

Q7b Based on what you have just read, which of these three parts of the business plan is the most important to you relating to *delivering a resilient water supply from source to tap?*
Please select one answer only

1. **Working to make our water treatment works to be more secure and enhancing the water quality.** Estimated annual cost: [HH: +£2.73, NHH: +1.37%] to the average customer bill *Hover over text: Increase the security of and improve the water quality from our sites in line with statutory requirements*
2. **Investing in reducing leakage by finding and fixing more leaks, managing pressure and finding leaks on customers pipes.** Estimated annual cost: [HH: +£3.73, NHH: +1.88%] to the average customer bill *Hover over text: To use our smart network to help find more leaks and repair them more quickly, achieving 50% leak reduction by 2040*
3. **Schemes aimed at protecting sites from flooding and power outages.** Estimated annual cost: [HH: +£1.78, NHH: +0.79%] to the average customer bill *Hover over text: Protect our sites from short-term power outages by installing equipment that will automatically switch to standby generators to stop sites from shutting down and protect one site at risk from river flooding during periods of heavy rainfall*
4. Don't know/can't say FIXED

S ASK ALL, RANDOMISE

Q7c Based on what you have just read, which of these two parts of the business plan is the most important to you relating to *helping you reduce your water footprint and charge a fair price?*
Please select one answer only

1. **Providing smart meters to 192,000 homes and businesses with a customer friendly way of monitoring their water use.** Estimated annual cost: [HH: +£7.94, NHH: +3.99%] to the average customer bill *Hover over text: Smart meters provide more information on how much water is being used and where. The data they produce will enable more targeted water efficiency support to be provided to customers.*
2. **Extra water efficiency support for customers.** Estimated annual cost: [HH: +£0.69, NHH: +0.35%] to the average customer bill *Hover over text: provide extra water efficiency advice to help the highest users reduce their water consumption*
3. Don't know/can't say FIXED

S ASK ALL, RANDOMISE

Q7d Based on what you have just read, which of these two parts of the business plan is the most important to you relating to *improving the environment and having a positive impact on the local area?*
Please select one answer only

1. **Enhancing the environment, increasing resilience and biodiversity on the River Eden.** Estimated annual cost: [HH: +£0.11, NHH: +0.04%] to the average customer bill *Hover over text: Work with partners in the River Eden to enhance the environment, increase the resilience of our water supplies and improve biodiversity (i.e., the variety and amount of wildlife present)*

2. **Work to enhance biodiversity on 70% of the land SES owns through improving land management.**
Estimated annual cost: [HH: +£0.12, NHH: +0.06%]to the average customer bill *Hover over text: Biodiversity is the variety and amount of wildlife present which can be improved by how land is used and managed*
3. Don't know/can't say **FIXED**

S **ASK ALL, RANDOMISE REVERSING ORDER**

Q8 Based on everything you have seen and read about SES's proposed business plan, how acceptable or unacceptable is it to you?
Please select one answer only

1. Completely acceptable
2. Acceptable
3. Unacceptable
4. Completely unacceptable
5. Don't know/can't say **FIXED**

M **ASK IF Q8=3 OR 4, RANDOMISE, MAX 2**

Q8a What are the two main reasons that you feel the proposals for your water services are unacceptable?
Please choose up to two answers only

1. The bill increases are too expensive
2. Company profits are too high
3. Companies should pay for service improvements
4. I expect better service improvements
5. The plan is poor value for money
6. Compared to energy prices it is more expensive
7. I am dissatisfied with current services
8. The plans don't focus on the right services
9. I won't be able to afford this
10. I don't trust them to make these service improvements
11. Other 1 – *Please specify* **FIXED**
12. Other 2 – *Please specify* **FIXED**
13. Don't know/can't say **FIXED**

M **ASK IF Q8=1 OR 2, RANDOMISE, MAX 2**

Q8b What are the two main reasons that you feel the proposals for your water services are acceptable?
Please choose up to two answers only

1. The plan is good value for money
2. The plan is affordable
3. Compared to energy prices it's cheaper
4. Their plans seem to focus on the right services
5. The company provides a good service now
6. I support what they are trying to do in the long term
7. The change to my bill is small
8. I trust them to do what's best for customers
9. I have been dissatisfied with the service recently but am pleased that they are making improvements
10. Other 1 – *Please specify* **FIXED**
11. Other 2 – *Please specify* **FIXED**

12. Don't know/can't say

FIXED

S **ASK ALL**

Q9 Long-term investments by SES will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long-term for future generations. Which one of the following options would you prefer?

Please select one answer only

1. An increase in bills starting sooner, spreading increases across different generations of bill-payers
2. An increase starting later, putting more of the increases onto younger and future bill-payers
3. I don't know enough at the moment to give an answer

HOUSEHOLD DEMOGRAPHICS

S **ASK ALL HH ONLINE, RANDOMISE**

Q10 In which of the following ways do you identify?

Please select one answer only

1. Female
2. Male
3. I identify in another way
4. Prefer not to say

FIXED

FIXED

S **ASK ALL HH ONLINE, RANDOMISE**

Q11 Please indicate which one of the following best describes the profession of the chief income earner in your household.

Please select one answer only

1. High managerial, administrative or professional e.g., doctor, lawyer, medium/large company director (50+ people)
2. Intermediate managerial, administrative or professional e.g., teacher, manager, accountant
3. Supervisor, administrative or professional e.g., police officer, nurse, secretary, self employed
4. Skilled manual worker e.g., mechanic, plumber, electrician, lorry driver, train driver
5. Semi-skilled or unskilled manual worker e.g., waiter, factory worker, receptionist, labourer
6. Housewife/househusband
7. Unemployed
8. Student
9. Retired

S **ASK IF Q11 = 9, RANDOMISE**

Q12 Which of the following best describes the previous occupation of the chief income earner in your household before retirement?

Please select one answer only

1. High managerial, administrative or professional e.g., doctor, lawyer, medium/large company director (50+ people)
2. Intermediate managerial, administrative or professional e.g., teacher, manager, accountant
3. Supervisor, administrative or professional e.g., police officer, nurse, secretary, self employed

4. Skilled manual worker e.g., mechanic, plumber, electrician, lorry driver, train driver
5. Semi-skilled or unskilled manual worker e.g., waiter, factory worker, receptionist, labourer
6. Housewife/househusband
7. Unemployed
8. Student

AUTOMATICALLY CODE QUESTIONS Q11 AND Q12 INTO SEG AS FOLLOWS:

CODE 1	A
CODE 2	B
CODE 3 OR 8	C1
CODE 4	C2
CODE 5	D
CODE 6 OR 7	E

M ASK ALL HH ONLINE, RANDOMISE

Q13 Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion.
Please select all that apply

1. I or another member of my household is disabled or suffer(s) from a debilitating illness
2. I or another member of my household have/has a learning difficulty
3. I or another member of my household relies on water for medical reasons
4. I or another member of my household is visually impaired (i.e., struggles to read even with glasses)
5. I or another member of my household am/is over the age of 75 years old
6. I or another member of my household speaks English as a second language
7. I or another member of my household is deaf or hard of hearing
8. I or another member of my household is a new parent
9. None of these apply to me **FIXED**
10. Prefer not to say **FIXED**

AUTOMATICALLY CODE Q13 INTO VULNERABILITY AS FOLLOWS:

CODE 1 OR 2 OR 3	MEDICAL VULNERABILITY
CODE 4 OR 6 OR 7	COMMUNICATIONS VULNERABILITY
CODE 5 OR 8	LIFE STAGE VULNERABILITY
CODE 1,2,3,4,5,6,7,8	ANY VULNERABILITY

S ASK ALL HH ONLINE, RANDOMISE GROUPS, OPTIONAL

Q14 What is your ethnic group? Choose one option that best describes your ethnic group or background.
Please select one answer only

White

1. English/Welsh/Scottish/Northern Irish/British
2. Irish
3. Gypsy or Irish Traveller
4. Any other White background, *please describe:*

Mixed/Multiple ethnic groups

5. White and Black Caribbean
6. White and Black African
7. White and Asian

8. Any other Mixed/Multiple ethnic backgrounds, *please describe*:
Asian/Asian British
9. Indian
10. Pakistani
11. Bangladeshi
12. Chinese
13. Any other Asian background, *please describe*:
Black/African/Caribbean/Black British
14. African
15. Caribbean
16. Any other Black/African/Caribbean background, *please describe*:
Other ethnic groups
17. Arab
18. Any other ethnic group, *please describe*:
19. Prefer not to say

S ASK ALL HH ONLINE

Q15 Which of the following bands does your household income fall into from all sources before tax and other deductions?

Please select one answer only

1. Up to £199 a week/Up to £10,399 a year
2. From £200 to £299 a week/From £10,400 to £15,599 a year
3. From £300 to £499 a week/From £15,600 to £25,999 a year
4. From £500 to £699 a week/From £26,000 to £36,399 a year
5. From £700 to £999 a week/From £36,400 to £51,999 a year
6. From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
7. From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
8. £2,000 and above a week/£104,000 and above a year
9. Don't know
10. Prefer not to say

G ASK ALL

D1 On a scale of 1 to 5, where 5 is very good and 1 is very bad, Using the rating please let us know how you would rate each of the following:

	1 Very Bad	2	3	4	5 Very Good
Length of survey					
Ease of completion					
Ability to express my true opinion					
Overall experience					

O ASK ALL

D2 Do you have any other comments regarding the content of this survey or your experience with it?

S ASK ALL

D3 Thank you for taking the time to give your feedback. As a further thank you for taking part, you are eligible to receive a £5/£10 incentive. Please select how you would like to receive your incentive. Please note if you select an Amazon gift voucher, you will need to confirm your email address again, so it can be sent to you.

1. Amazon voucher
2. Donation to charity

O ASK IF D3=1, ADD EMAIL VALIDATION

D4a Please provide your email address so the voucher can be emailed to you.

O ASK IF D3=2

D4b Please provide the name of the charity you wish to make your donation to.

INFO

Thank you, you have reached the end of this questionnaire, your feedback has been greatly appreciated! Water companies offer help to qualifying low-income households that are struggling to afford their water and wastewater bills.

More information about this can be found here [\[EMBEDDED HYPERLINK: https://seswater.co.uk/your-account/paying-your-bill/help-paying-your-bill\]](https://seswater.co.uk/your-account/paying-your-bill/help-paying-your-bill)