APPENDIX SES014

CUSTOMER RESEARCH SUMMARY AND METHODS

Contents

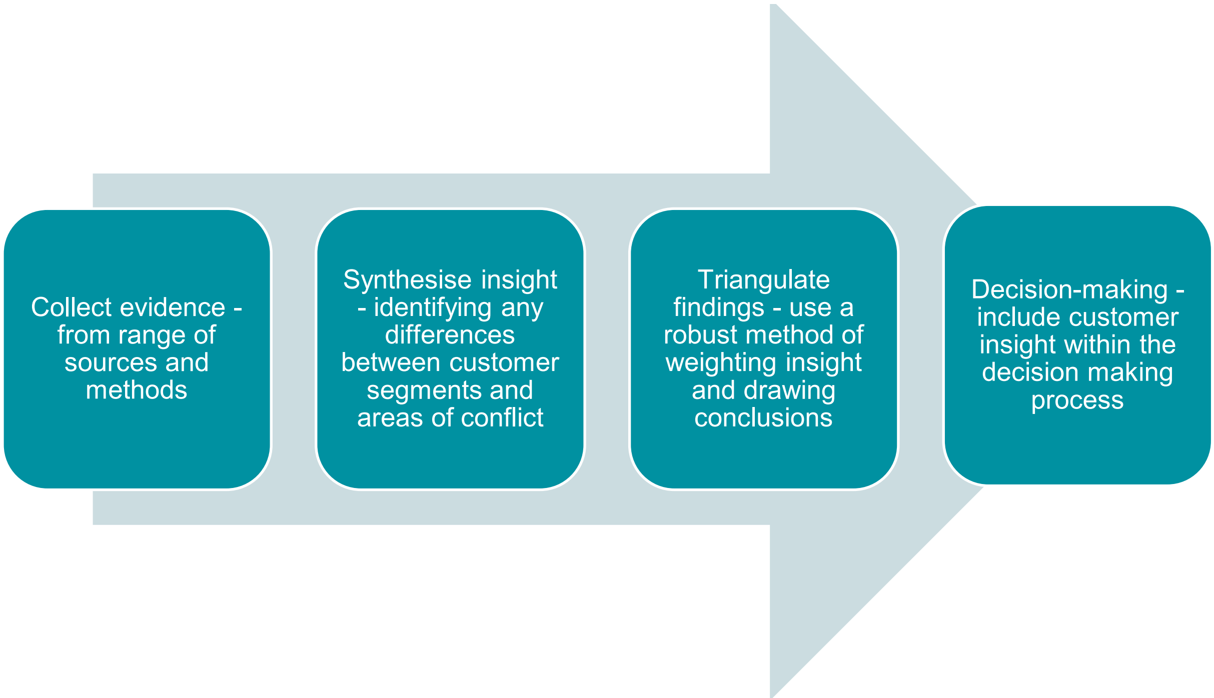
APPENDIX SES014: CUSTOMER RESEARCH AND ENGAGEMENT PROGRAMME

A. Background and purpose of this document

This appendix provides details of the customer research we have used to inform our PR24 business plan. It documents the methods of engagement, research quotas and sampling strategies we have used across our research programme. We also document how our customer research and engagement has met Ofwat's standards for high quality research, customer challenge and assurance,

2. Our PR24 business plan sets out how we will continue to deliver our day-to-day service to customers and areas of investment between 2025 and 2030.
3. Our plan has been informed by insight gathered from customer engagement and research. To make robust decisions about how insight has informed our plan, we have followed the following process when reviewing and assessing the insight carried out and ensuring it is given appropriate weight and consideration within our decision-making process. Figure 1 summarises the process we have followed to incorporate insight into our PR24 plan.

Figure 1: Summary of our research and triangulation process



Source: SES Water

4. This appendix provides details of the first step in this process. It summarises the evidence we have used to inform our business plan for 2025 to 2030. It details all the sources of insight we have considered and how that insight has been collected, focusing on the channels and methods we have used to gather the insight from customers to inform our plan. It explains how customers and stakeholders have been able to challenge our plan and how we have assured the quality of our customer research and engagement approach. It shows how our research and engagement programme meets Ofwat's standards for high-quality research, customer challenge and assurance.
5. In this appendix you will read about:

(a) Our customer research programme

- Insight we have used to inform our PR24 business plan
- How our activity meets Ofwat's standards for high-quality research

(b) Customer challenge of our plan

- How customers and stakeholders have challenged our plan
- How our customer challenge process meets Ofwat's requirements

(c) Assurance of our plan

- How we have assured the quality of customer engagement
- How our assurance process meets Ofwat's requirements.

6. It supports Chapter 5 Our Customers and should be read alongside Appendix SES015 which details our insight synthesis and triangulation and Appendix SES018 Customer Research Output Reports.

B. Our customer insight programme

7. The customer insight we have gathered to inform our business plan for 2025 to 2030 has come from a range of sources including:

- Day-to-day interactions with customers
- Primary research conducted ahead of the current price review process in key business areas
- Collaborative research carried out by Ofwat and CCW to inform all water company business plans
- Company-specific research carried out to inform our business plan and long-term delivery strategy
- Insight gathered by third parties including the other water companies in the Southeast of England.

8. The following table presents all the sources of insight we have considered in preparing our business plan for 2025 to 2030 and details of the sampling, methods and topics covered.

Table 1: Customer research programme

PR1: SES Purpose research **Agency: Given** **May 2021** **Company-specific research (outside price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To re-evaluate SES's purpose for the long term in light of a changing landscape, taking account of current regulatory pressures, as well as future operational and environmental challenges.	**Qualitative** – 3 customer w/shops - 18 customers across 3 customer groups 4 colleague co-creation w/shops 5 colleague listening groups Senior stakeholder interviews, Community w/shop	Recruited 6 x future customers 6 x older families 6 x young families 5 x senior stakeholders 6 x community representatives 54 x colleagues	Participants drawn from across the SES water supply area	The value of water Long term sustainability Environmental impact Role in local communities	Company purpose Long term vision, ambition, and priorities	2x joint ESP/CSP input and challenge sessions Board play back and review session
PR2: SES Water Citizens Panel **Agency: Explain** **August 2021** **Company-specific research (outside price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To explore opinions and attitudes on a range of topics including the drought plan, net zero, resilience and SES business.	**Qualitative** – 4 online deliberative sessions (2 hours each)	Recruited 21 HH customers - 4x18-34, 10x35-44, 1x45-54, 4x55-64, 2x65-74; 13xABC1, 8xC2DE	Panellists are recruited from across the SES Water supply area	Drought plan Resilience Net-zero	Long-term vision, ambition, and priorities	
BAU1: Voice of the Customer **Agency: Explain** **Annual tracking, 2020-21** **Company-specific research (outside price review)**						

Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To evaluate SES performance against PCs (Performance Commitments) and other important metrics.	Telephone (CATI) interviews -	400 HH & 100 vulnerable customers a quarter; (1600 & 400 pa)	SES Water provides its whole customer database to Explain, so interviews cover the whole water supply area	Trust, water quality, reliability, value for money, NPS and water efficiency and climate change.	Provides a trended view of how customer perceptions are changing but also helps highlight areas of concern via customer verbatims.	Outputs are shared with ELT (Executive Leadership Team) members our CSP/ESP and our NEDs (Non-Executive Director) in the customer committee meetings.
BAU1: Voice of the Customer **Agency: Explain** **Annual tracking, 2021-22** **Company-specific research (outside price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To evaluate SES performance against PCs and other important metrics.	Telephone (CATI) interviews -	400 HH & 100 vulnerable customers a quarter; (1600 & 400 pa)	SES Water provides its whole customer database to Explain, so interviews cover the whole water supply area	Trust, water quality, reliability, value for money, NPS and water efficiency and climate change.	Provides a trended view of how customer perceptions are changing but also helps highlight areas of concern via customer verbatims.	Outputs are shared with ELT members our CSP/ESP and our NEDs in the customer committee meetings.
CR1: Water resource management plans for WRSE (phase 1) **Agency: EFTEC** **Aug 2020 – March 2021** **WRSE companies' collaborative research**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To provide a consistent view of customers' priorities for the principles, policies and	**Qualitative** – 10 reconvened focus groups	Qualitative recruited c. 80 HH customers in total, utilising a mix of SEG and age	The project covered all the WRSE companies (SES Water, Thames,	water resources and the risk of emergency drought restrictions;	WRSE regional plan and SES Water WRMP	Regional customer

solutions that will shape future water resource plans.	from 10 participating companies **Quantitative** – approx. 2,300 household customers and 350 non-household customers	Quantitated recruited	Southern, Affinity, Portsmouth, and Southeast Water. SES Water group included people from London and Surrey areas. The survey covered all the SES Water area.	resilience planning; (supply and demand options; sharing resources and strategic options. Representative online survey of customers in the WRSE region carried to measure preferences for: (i) demand and supply options; and (ii) alternative regional plan profiles.		challenge group
CR2: Ofwat /CCWater customer priorities research **Yonder** **April 2022** **Collaborative industry research (price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To understand consumer preferences in relation to water and sewerage services.	**Qualitative** – 12 focus groups and 16 in-depth interviews	86 HH customers 16 NHH customers, Over 75s, future customers and English as a second language	National piece of research	As well as consumer preferences, review activities in draft performance commitments and identify any other issues of importance; test descriptions and measurements of performance commitments with water consumers, and identify any improvements to make them more meaningful for use in future research; and understand any differences in views between groups of consumers	Common performance commitments PR24 Business Plan Long-term delivery strategy	
PR3: SES Water customer priorities **Agency: Given**						

August 2022
Company-specific research (price review)

Purpose	Method	Sample strategy	Geographical spread	Topics covered	What it has informed	Assurance
To identify a set of priorities for SES Water customers that will align with the company's purpose and act as the foundation of its Long-Term Delivery Strategy	**Qualitative** 5 two-hour customer workshops - 4 online and one in person 1:1 interviews (vulnerable and non-household)	4 household (HH), 1 future customers; 5 vulnerable customers 4 non-households (NHH)	The online groups & depth interviews were drawn from across the whole SES Water's supply area. The in-person group was drawn from the Sutton area of SES Water.	Water quality Leakage Water supply Water consumption Environment Affordability Customer service and support Societal benefits	Common performance commitments Long-term delivery strategy ambition and priorities	

PR4: ESG Materiality Assessment
Agency: Sphera
August 2022
Company-specific research (outside price review)

Purpose	Method	Sample strategy	Geographical spread	Topics covered	What it has informed	Assurance
To conduct a materiality assessment on ESG issues aiming to have a starting point for integrating material aspects of sustainability into joint management and evaluation processes	Quant & Qual - Survey with 31 internal stakeholders and 23 external (54 overall), followed by interviews with selected stakeholders	No specific strategy but achieved good cross section of stakeholders. Interviews with selected stakeholders.as follows: Board Member; SES Water Employee or Management; Household Customer; Investor / Shareholder; NGO (Environmental Association & Charity); Local Council / Public Authority; Educational Sector; Housing / Residents Association; Supplier / Partner & Regulatory Bodies	N/A	**Environment:** Water resources Water quality Biodiversity Waste & effluents Energy consumption Greenhouse Gas Emissions Climate change **Social:** Occupational health & safety Training & education Diversity & equal opportunities Local communities Customer centric water services Water affordability & access	Long-term ambitions	

				Cyber security / data privacy **Governance:** Economic performance Tax Anti-competitive behaviour Sustainable supply chain		
CR3: Ofwat /CCWater customer valuations research **Agency - Accent** **Date – May 2022 – June 2023** **Collaborative industry research (price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
Programme of collaborative industry-wide research with the aim of ensuring a common basis for the setting of ODI rates for the common performance commitments (PC) anticipated to be in place for PR24. This was to address the variability in results found at PR19, and previous reviews, which was thought to be caused by differences in design, quality, and approach between water companies	A desk review of academic literature on and relevant industry materials from PR19 and RIIO2. Consultation with companies, individually and an industry workshop to review options. Several stages of qualitative testing via depth interviews, and two large-scale quantitative pilots Two linked stated preference choice exercises:	195 interviews undertaken.	National research, so all water company areas covered.	A pairwise choice exercise to show which of the service issues would have the most impact on customers. contingent valuation exercise in which customers were asked to choose between experiencing a service issue and being compensated for it, or not experiencing the issue and not receiving any compensation.	PR24 plan – ODI rates for performance commitments	
PR5: Future customer priorities and choices **Agency: Create 51** **February and March 2023** **Company specific engagement (price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**

To understand the views and priorities of future customers and to test the level and pace of ambition in areas where there are genuine choices for customers across the next 25-years.	**Qualitative**: 2 x interactive workshops. Workshop 1 after visit to Bough Beech reservoir & education centre. Workshop 2 after week of work experience at SESW	Workshop 1 – members of the Surrey CC Youth Cabinet (aged 15 to 23) Workshop 2 – year 10 students from two schools (aged 14-15)	N/A	Long-term challenges; PCC (Per Capita Consumption) reduction; Net zero carbon; Leakage; Environmental enhancement; Lead	LTDS ambition and sequencing PR24 enhancement claims	CSP reviewed material in advance CSP in attendance at session 2
PR6: Customer choices (level and pace of ambition) **Agency – ICS Consulting** **May – August 2023** **Company specific research (price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To test the level and pace of ambition in areas where there are genuine choices for customers across the next 25 years. Specifically to i) identify customers' relative priorities for overall water service key outcomes and build understanding of the factors influencing their preferences; ii) focussing on investment areas where customer preferences may have a material impact on SES Water's investment plans over the next 25 years, determine customers' preferred outcomes for each investment area, including the pace and scale of improvements; iii) understand the factors influencing their choices including the impact of potential bill increases and	**Quantitative** Survey carried amongst 680+ HH customers – 606 online and 75 on street surveys **Qualitative** Four online customer playback groups	Quotas based on SES customer database. Location - 59% Surrey, 41% London; SEG - 72% ABC1, 28% C2DE; Gender - 53% men, 47% women; Age - 18-34 7%; 35-64 60%, 65+ 33%; Other profiling showed: 9% reported disability or restricted mobility. 81% are homeowners; 23% have children under 18 years living at home; 23% identified either themselves or someone in their household was vulnerable; 12% who were willing to provide data have an annual household income of less than £16,500; 14% who were willing to provide data stated they always or sometimes find it difficult to pay their water bill. 2 x London, 2 x Surrey each having one group of 18-45, and one of 46+. Within the groups there was a good mix of SEG - in total, 14 ABC1s and 11 C2DEs. There were also 8	Across the whole of the SES Water supply area. Street surveys were conducted in the London boroughs to help boost the lower SEGs, as well as younger customers. There was good coverage across SES Water's local authority areas: London – Croydon, Sutton & Merton. Surrey - Reigate and Banstead, Mole Valley, Tandridge, Elmbridge, Epsom & Ewell, Guildford, Mid Sussex & Sevenoaks.	Spontaneous ranking of 11 water supply issues Importance ranking of five issues being put forward for enhancement cases: Lead, Leakage, Smart Metering, Environmental enhancement, Net zero carbon. Rankings were made without any associated bill impacts. Customer preferences for investment with associated ill impacts. The groups played back the findings from the survey to see how the results aligned in a qualitative setting. In addition, to gain further understanding of why people made various investment choices, a deep dive was carried out to explore the issues in more depth.	LTDS PR24 performance levels enhancement claims	During the design of both the qualitative and quantitative stages, the CSP provided comments and input. The SES Board was also consulted to validate the proposed enhancements, both in terms of pace, scale, and the associated bill impacts.

affordability; and iv) Identify any variances in customer preferences and choices between different segments such as age, location or SEG		people from a different ethnic origin of 'White British'				
PR7: Social tariff July 2023 **Agency – DJS** **August – September 2023** **Company specific research (price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
To understand customers' acceptability and willingness to contribute to an increased cross subsidy, and how much extra people were willing to contribute.	**Quantitative** 869 HH interviews were carried out **Qualitative** Five follow up depth interviews with people who had participated in the survey	**Quantitative** The demographics split as follows: Age: 18-29 4%, 30-44 28%, 45-59 31%, 60-74 24%, 75+ 13%; Gender: Male 43%, Female 57%; SEG: ABC1 57%, C2DE 43%, Ethnicity: White British 80%, Other 20%; Illness & disability 36& and 21% with a meter. **Qualitative** The five depth interviews were split equally across age, gender, SEG, confidence in paying the water bill and the amount people were willing to contribute towards more customers being on the social tariff.	All the company's customers were in scope for the survey. There was good representation across all of SES Water's local authority areas: London – Croydon, Sutton & Merton. Surrey - Reigate and Banstead, Mole Valley, Tandridge, Elmbridge, Epsom & Ewell, Guildford, Mid Sussex & Sevenoaks	Customer views on i) the extent to which customers are confident they will be able to afford their water and other household bills over the next 12 months; ii) measure the proportion of customers who find the principle of social tariffs acceptable/unacceptable, and why; iii) inform customers about plans for the future of the scheme (partly) funded through social tariffs and understand how acceptable or unacceptable this is to customers; and iv) assess customers' willingness to contribute (WtC) to a social tariff through their water bill, and the amount that they would be willing to contribute each month as	How much SES Water can increase the cross subsidy by, and the associated bill impacts	

				part of their bill to support this.		
PR8: Affordability and Acceptability Testing **Agency – Impact** **July – September 2023** **Company-specific research (price review) - following the Ofwat mandated process**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**
In its guidance, Ofwat mandated two phases of research: - Initial qualitative research to test the acceptability and affordability of our draft plans. Feedback from which we will use to refine our plan. - Quantitative research to test the acceptability and affordability of our final refined plan.	**Qualitative** – four online focus groups with HH customers; one online session with future customers **Quantitative** – 506 surveys completed in total, 504 online and 2 by post. All HH customers were recruited from a s list provided by SES Water. Initially, 3,750 customers contacted via email and 1,250 via post, giving a total of 5,000 customers. 200 emails bounced back, so 200 more were sent. The sample was further expanded by 1,600 customers, 1,200 being contacted by email and 400 by post. In total 6,800 attempted contacts were made.	Qualitative 25 HH billpayers 9 future billpayers 9 NHH <10 employees 4 NHH >10 employees 6 digitally excluded HH 8 financially vulnerable HH 8 health vulnerable HH Quantitative – The demographics were as follows: Age: 18-34 11%, 35-44,18%, 45-54 18%, 55-64 24%, 65-74 21%, 75+ 8%; SEG: ABC1 67%, C2DE 33%; Gender: Male 46%, Female 52%, Other 2% Vulnerability: Medical 23%; Communications – 47%; Life stage – 15%; Other – 4%	The research covered all of SES Water's supply area	The topics were mandated buy Ofwat as part of the design it set out and are relevant to both HH & NHH customers. They included Ease of paying regular bills and water bills How well HHs & NHHs (non-households) are managing financially, and how they expect the situation to change in the next few years Importance of proposed business plan elements Affordability of proposed business plan Acceptability of proposed business plan Bill profile preference		
PR9: Small Company Premium research **Agency – Explain** **July - August 2023** **Company specific research (price review)**						
Purpose	**Method**	**Sample strategy**	**Geographical spread**	**Topics covered**	**What it has informed**	**Assurance**

To understand customers' views on being served by a small water company and whether they are prepared to pay more to be served by a small a company. Specifically, the research has the following objectives: i) to explore customer views on being supplied by a small, local water company; ii) the support for a specific company adjustment (to the cost of capital); iii) the adjustment of the pay as you go ratio to ensure SES Water remains financeable; iv) the acceptability of the resultant bill profile; v) customer willingness to pay the £2 premium on their water bill per year	Qualitative phase – 3 online focus groups Quantitative phase – 922 surveys in total 849 online and 73 on-street surveys	Qualitative - three mini HH customer groups with 5 or 6 in each group - 16 participants in total. The demographics were as follows: 9 males, 7 females; ABC1 - 14; C2DE – 2. One group was aged 25-74, one was 35-54 and the other was 25-64. Quantitative - Gender: male - 46%, female - 54%; Age - 18-34 15%; 35-64 55%; 65+ 30%; SEG - ABC1 62%, C2DE 38%; Location - Surrey 55%; London 44%.	Across the SES Water area with on-street recruitment focussed on London Boroughs (Sutton & Croydon) to ensure adequate representation from this area. All 11 LAs were represented and aligned well with the SES Water customer base.	Customers views advantages and disadvantages of being served by a small company How much customers are prepared to pay Support for a £2 addition to annual bills	Small company premium case and bill impacts	

C. How we meet the standards for high quality research

9. In the following table we highlight how our research programme meets Ofwat's standards for high-quality research.

Ofwat's standards	SES Water action
Useful and contextualised - Practical relevance – clear why it has been undertaken, what it will contribute to and how - Designed with quality rather than quantity as the priority - Presented alongside a wider evidence base – including research conducted by others - Analysis should contextualise the findings and explain how they will be used.	Following the recommendations from Ofwat at PR19 about our customer insight, we have taken a more deliberate and iterative approach to engagement programme, one that focuses on quality over quantity and is highly relevant both to PR24 planning as well as over the longer term i.e. 25 years. Throughout the engagement process we have been clear on what research is needed and why, and how it will contribute the business plan. We have maximised the use of BAU insight and research conducted for other business purposes to set the foundations for our PR24 plan. Analysis of this was carried out to identify any changes since PR19 and compared against research carried out by other companies to identify key trends and the collaborative priorities research carried out by Ofwat. This enabled us to identify gaps in our understanding of customers' priorities and where there were inconsistencies that needed further exploration. We have carried out four key pieces of company-specific research to supplement the collaborative research: - Bespoke 1 Customer priorities – to inform our long-term ambitions and priorities - Bespoke 2 Customer priorities, choices, and outcomes – to inform the level of long-term ambition in our LTDS, as well as the pace and sequencing of investment to achieve the ambition - Bespoke 3 Social tariff – to inform the level of customer cross-subsidy for our social tariff and the level of support that will be offered - Small Company Premium – to test support for a higher cost of debt because of small size We have relied upon the collaborative industry research to set our performance commitments and the ODI rates associated with them. We have conducted affordability and acceptability research in-line with Ofwat's methodology to test our PR24 plan. Our first 'Your Water, Your Say session,' which followed Ofwat's guidance, was one of the best attended sessions in the industry. The second one will be carried out after Business Plan submission. Overall, we consider our research activity to be targeted at areas that our customers can meaningfully influence and where they have genuine choices. We also believe our programme is proportionate to the size of our company and the level of investment we are seeking.
Neutrally designed - Neutral and free from bias – potential for bias and how to negate it should be considered at every stage in the process and evidenced - this includes set up, question wording, question ordering, stimulus materials, selective	We have partnered with a range of research and engagement experts to deliver our programme. This mix has enabled us to ensure that for each project we have a fresh perspective, and no pre-existing bias carried over from previous research. We have utilised several research approaches as part of our customer engagement programme. These different methodologies are more fully explained in the next section, suffice to say, that whatever the design of the research, the independent research companies have developed objective, neutral and factual materials to avoid misrepresentation and bias. For both quantitative and qualitative studies, this includes

use of quotes or data in reporting and interpretation of findings. - If inherent bias that is unavoidable or an unintentional outcome it should be acknowledged in the research findings	recruitment questionnaires, how questions are constructed and what order they are in, as well as stimulus materials. Importantly, the research findings present a balanced view of what customers have told us, indeed we have not shied away from reporting the concerns and misgivings they have on a range of issues. Where this has been the case, quotes have been provided to support people's concerns. Finally, all the research studies have tried to include an accurate and robust representation of our customer base. However, as our water supply area has a disproportionate number of affluent and older households, this is sometimes reflected in the sample, and we have ended up with a larger number of households in the higher social grades, as well as more people in the older age groups. Although these samples are representative of our customer base, we have sought to mitigate this issue by increasing the sample amongst lower social grades, and/or weighting the sample, to ensure any unintended outcomes in the results can be fully accounted for. The CSP has reviewed and commented on the stimulus and topic guides used in all price review specific research
Fit for purpose - Research sample and methodology should be appropriate for the research objectives - Participants should understand the questions and surveys should limit the use of forced choice options - A research approach that has previously been challenged should not be repeated - Innovation is welcome if it is likely to lead to meaningful and trusted insight and learning	We have used a mix of research methodologies to gather insight to inform our plan. This has included deliberative sessions to allow us to explore key subjects in more depth using a range of on and off-line methods. We have increased the amount of quantitative research we have carried out, in response to feedback on our PR19 plan. This has delivered a level of rigour and robustness to the engagement programme enabling a much better understanding of people's strength of feelings towards SES priorities. Qualitative research has been conducted in areas where there has been a requirement to explore issues in more detail, including setting out SES's purpose, our long-term ambitions and sequencing of investment, PR24 enhancement claims, affordability, and acceptability testing (AAT) and to inform our WRMP (Water Resources Management Plan) – a significant driver of our investment programme. Various qualitative approaches have been utilised, including two-hour deliberative groups (customer priorities), reconvened groups (WRMP), three-hour deliberative sessions (AAT) and one hour depth interviews (AAT, bespoke 2), as well as standard focus groups (long term ambition). To ensure quantitative surveys are credible (Bespoke 2, AAT and WRMP), cognitive interviews have often been carried out to make sure participants understand what is being asked of them, and to check how clear and straightforward the questions are. With the social tariff and small company premium research, soft launches of the surveys were undertaken to ensure the questionnaires were fit for purpose and were not producing any erroneous data. Where both qualitative and quantitative research have been undertaken on the same project, standard protocols have usually been followed where the former has preceded the latter to explore the specific issues with a view to informing the survey design. In the Bespoke 2 research, however, focus groups were used to playback the survey findings, enabling customers the opportunity to challenge and/or validate what customers said in the survey. Similarly, for the social tariff research, we carried out the qualitative element first, and this was followed by in-depth interviews which acted as case studies to explore in more detail some of the issues raised by participants in the survey. Furthermore, we have also undertaken workshops with future customers looking into long term priorities. The first workshop included a site visit to Bough Beech reservoir to provide some context about the SES Water's operations,

	its roles, and responsibilities. This comprehensive approach has ensured our decisions are based on robust evidence from a wide and representative sample of customers. In terms of innovation, our Bespoke 2 research, 'Customer Priorities, Choices & Outcomes', included a 'Build your own Bill' mechanism. This enabled customers to revisit their preferred investment choices and gave people the option to change them if they were unhappy with the total bill amount. As such, this provided another level of confidence in people's choice of investment.
Inclusive - Research should include different audiences and socio-demographics, considering local or regional or national populations, business customers and retailers - Where possible, findings should report on variances by socio-demographics and consumer types - Details of those excluded or underrepresented should be provided - Mix-method approaches to provide a more inclusive set of findings should be used where possible - Research programme, should be demonstrably inclusive	Across all our research studies we have sought to include as wide a range of audiences as possible. This is to ensure that we have heard from a robust cross section of our customer base and that it is representative of the various customer segments. Where we have completed quantitative surveys, we have developed a sampling strategy that is based on geographic location, social grade (SEG), age and gender. Geographic location is split in two ways i) at a high level i.e., Surrey and London, and ii) at a local authority level. We have also captured other demographic, although not set quotas on it. This includes whether have people have water meters or not, the composition of their household, whether there are any long-term health issues in the household, whether they rent or own their home and what their ethnicity is. Quotas are not relevant for qualitative studies. Where we have carried out qualitative research, we have recruited customers either according to life stage or by standard demographics (age, gender and SEG). Due to the budget constraints of being a small company, our qualitative studies have not allowed for fulsome segmentation opportunities. We have therefore prioritised age over SEG, as, like other companies, age has a more differentiating effect on people's views than SEG. For some studies we have used life stage, or customer types, as an alternative to standard demographics because this has been a useful way to explore issues according to people's life situations. There is no right or wrong way, the aim has been to obtain a range of views, attitudes, and motivations from across a broad cross section of our customers, and we believe we have achieved this. Mixed method approaches have been used where the objectives have leant themselves to this e.g., Bespoke 2, AAT, SCP, and social tariffs. Other times, the research has been exploratory and investigative, and as such, only qualitative methods have been utilised. In addition to the above, we have also reached out to vulnerable customers both qualitatively through our vulnerable customer stakeholder group or quantitively through our BAU customer tracker. To ensure we have accounted for future customers, and to understand what their priorities and concerns are, we have run workshops from year 10, to university students and through to postgraduates. And finally, we have sought the views of non-households and retailers. Quantitatively, this has been challenging as one, we do not own the relationship with non-households, and two, despite ongoing efforts, retailers have not been very engaged during the process. We suggest this is an industry issue as other companies have found the same thing; as such we recommend this is reviewed for future price reviews. In our reporting we have reported customer views both as a whole, as well as differentiating by segment where there are discrepancies and inconsistencies in people's views.

	In conclusion, we believe we have shown that our customer engagement programme has been demonstrably inclusive across a broad range of bill paying and future customers.
Continual - Research programmes should be continual enabling day to day insight gathering as well as specific and relevant research for informing business plans and long-term delivery strategies	In developing our business plan for 2025 to 2030, we have used insight from our day-to-day customer interactions and primary research. The day-to-day insight we have considered includes: • C-MeX surveys and shadow surveys • Insight from our quarterly Voice of the Customer programme • Regular polls and surveys to our online customer panel on topical issues • Analysis of our website analytics, complaints, and unwanted contacts. We have conducted primary research in some key business areas, outside of the current price review process, which we have considered in the development of our business plan. This has included deliberative research into: • How we achieve net zero carbon emissions • How we manage droughts • The resilience of our service • Our company purpose • Water resource management through WRSE collaborative research Primary research has also been conducted to directly inform our business plan in areas where customers can have meaningful impact. This has included: • Collaborative industry research on customer priorities • Company-specific research on customer priorities • Collaborative industry research on customer valuations (ODI rates) • Company-specific research on long-term level of performance ambition and sequencing of investment • Company-specific research on our social tariff • Company -specific research on the cost of debt (small company premium) • Affordability and acceptability testing of the PR24 plan. Although much of our customer engagement has been undertaken specifically for the price review, many of the issues that have been covered will be further explored, tracked, and measured as part of our ongoing customer engagement. Indeed, going forward we will ensure that we have an evolving understanding of customer views on various aspects, such as, protecting the environment, net zero, water efficiency, leakage reduction and affordability of bills.
Shared in full with others - Research findings should be published and shared in full as early as possible with as wide an audience as possible	As well as setting out the detailed findings of each customer research project, we have included all the supplementary information as appendices to the reports. These include recruitment questionnaires, topic guides, questionnaires, and stimulus materials. The research methodology always forms part of the main report, along with an executive summary, the main findings, conclusions, and recommendations.

- Findings should be accompanied by clear and detailed information on the methodology, to include recruitment screeners, questionnaires, discussion guides and stimulus materials	As well as circulating the research report to management and the CSP, we have published all the research reports on our website so that they are in the public domain.
Independently assured - Research should be reviewed by individuals or groups that are independent of water companies - They should have a range of relevant skills and expertise and feel confident and able to challenge on all elements of research - Information shared should be relevant and timely - Water companies should be transparent about the research findings and whether, and in what ways, it has been used	Our Independent Customer Scrutiny Panel (CSP) and Environmental Scrutiny Panel (ESP) have been given the opportunity to review all outputs from our research programme. Our CSP has also played an independent assurance role through the recruitment of a research expert onto the group. In Appendix SES015 – our Insight Synthesis we set out summarised research findings for each business area and have published all detailed findings from our research.
Ethical - Conducted in line with the ethical standards of a widely recognised research body	The research agencies we have worked with are all affiliated to a recognised research body, the Market Research Society (MRS), and conduct research in-line with their standards, and most people on the various project teams have individual member of the MRS.

D. How we have enabled customers to challenge the plan

10. It is important that customers and stakeholders could challenge our plans as they develop and that there is ongoing scrutiny of our performance. This challenge provides us with feedback on how our plans meet their needs and to highlight the issues that matter most.
11. We have two panels in place that continually scrutinise and challenge our company performance and delivery of our priorities. Both have played an active role throughout the development of our business plan for 2025 to 2030.
12. Customer Scrutiny Panel – [SES Water Customer Scrutiny Panel | SES Water]
13. Environmental Scrutiny Panel – [SES Water Environmental Scrutiny Panel | SES Water]

14. In addition, we have provided several opportunities for customers to challenge and provide feedback, throughout the development of our long-term delivery strategy and PR24 plan. This includes responses to statutory consultations carried out on our Drought Plan and Water Resources Management plan, responses received through other consultative exercises and our Your Water Your Say Session.

Subject	Activity	Engagement method	Response
Drought Plan	Statutory 12-week consultation on draft Drought Plan (dates)	Targeted stakeholder emails Citizen Panel survey	5 formal responses 17 responses to short survey
Long Term Delivery Strategy – Priorities and Ambition	4-week response period via online survey (Oct to Dec 2022)	Targeted stakeholder emails Customer emails	174 responses
Water Resources Management Plan	Statutory 12-week consultation on draft WRMP (Nov 2022 to Feb 2023)	Targeted stakeholder emails Customer emails Citizen panel	128 responses
Your Water Your Say	Online meeting (25 April 2023)	Targeted stakeholder emails Customer emails Media and social media promotion	300 signups 85 attendees

How we meet the standards for customer challenge

Ofwat's standards	SES Water action
Independence - The people involved in customer challenge are independent from the company - Mechanism for customer challenge should be truly independent of the company and ensure the company listens to representative voices - Challenge solutions should be arm's length from the company with no restrictions or expectations which compromise its independence. Any conflicts of interest between the source the challenge and the company should be explained - Minimise company contribution to, and review of, any outputs from the customer challenge before it is shared publicly. The public sharing of all outputs from customer challenge is a key requirement to ensure transparency	We recruited independent Chairs for our CSP and ESP through a transparent public recruitment process. Both have recruited further members to the panel who are independent from the company. Both groups meet privately in addition to quarterly meetings with the company, minutes from which are published on the SES Water website SES Water Customer Scrutiny Panel | SES Water SES Water Environmental Scrutiny Panel | SES Water

Board accountability - The company board is accountable for having in place a mechanism for, and listening too, customer challenge - Company boards should be able to demonstrate how business plans and wider decision-making take account of matters that are important to customers, including those highlighted through the customer challenge process	Our Board has a nominated independent NED (Non-Executive Director) responsible for customer engagement. They attend our quarterly Customer Committee meeting at which we regularly review customer insight and how the company's plans are responding to this Board members regularly attend CSP and ESP meetings to hear the areas of challenge The Chairs of the CSP and ESP are invited to Company Board meetings.
Ongoing - Customer challenge is ongoing in development and delivery of business plans - Companies should provide evidence of welcoming and responding to challenges on their day-to-day performance as well as during the development of business plans for price reviews and long-term delivery strategies	Our CSP and ESP are established groups that meet quarterly to enable ongoing challenge of our performance and how well we are responding to the BAU Insight we receive from customers. Both scrutinise our ongoing performance and contribute to the development of our customer and environmental strategies.
Informed - Challenge process is informed by high-quality, comparative information and trends over time - The company should provide access to all relevant information to enable meaningful challenge - Information should be provided freely by the company when requested with nothing deliberately withheld and no limitations on sharing - Those challenging should have time, resource, and expertise to do so effectively	Our CSP and ESP are presented with our latest performance information at each meeting, which includes how our performance compares to others. We provide CSP and ESP with information into how other companies are delivering services and areas of progress and innovation to enable them to challenge us fully. On occasion we invite external speakers to provide wider insights and experience that help enhance their ability to challenge. Our ESP uses best practice and thought leadership to inform its challenge of our performance and is made up of independent experts in sustainability and environmental issues. Likewise, our CSP consists of consumer champions and research experts.
Transparent - The company is transparent about the nature of challenges raised, the company response to each challenge and relative performance - Demonstrate they have been transparent about relative performance levels by using information with definitions that are consistent across the industry - Evidence to demonstrate how they are listening to customers - Explain how evaluations of different business plan options have taken account of customer views, with a focus on the options which provide the greatest benefit to customers and the environment	Both the ESP and CSP have a challenge log which tracks the areas where challenge has been made and how the company has been responded. We published the full list of questions and responses raised at our first Your Water Your Say session and we have set out how we have responded to this challenge in our business plan (chapter 5) and will hold a second Your Water Your Say session in November. We have published a full statement of response to our draft WRMP and a non-technical summary explaining how our WRMP has changed.

- Timely publication of evidence of customer views gathered through research and engagement exercise - A published record of all challenges raised by customers or their representatives - Published evidence of the company's responses to these challenges, including reasons for why no action is required - Clear identification of areas of disagreement	
Representative - Challenge comes from a representative range of customers and open to all relevant stakeholders - The company should consider the views and experiences of the broad range of customers it is serving – technical experts, general public - Customer challenge should make sure the views of the range of end user customers - household, non-household, hard to reach, vulnerable, future customers – are understood - Insight from intermediate customers should be considered	Opportunities to challenge our plan during its development have been open to all. We have proactively publicised all our public consultations across a wide range of channels to customers and stakeholders. We publicised our Your Water Your Say event widely to our customers. This included direct emails, media publicity including a BBC news interview, via third parties such as vulnerable customer representatives. The high number of sign-ups and questions submitted in advance demonstrated effectiveness of our engagement approach. We have established a specific group comprising representatives of vulnerable customers to help ensure the views of those who may need extra support from us are considered.
Comprehensive - Challenge focused on full range of areas where customers can have meaningful views – water services, customer service, large schemes, performance levels, bill impacts - Challenge should focus on important and material or urgent issues which companies should incorporate into their business plans and LTDS for price reviews or wider decision making	Opportunities to challenge our plans have been focused on the most important and material issues. The public consultation on draft WRMP enabled customers to challenge our long-term plan to secure water resources and our ambition related to leakage reduction and consumption reduction which is a critical input to our long-term delivery strategy and business plan. Our Your Water Your Say session also covered this area comprehensively. Your Water Your Say also enabled people to comment on our PR24 plan in the context of our long-term ambition. This enabled people to comment on potential bill rises, ahead of the formal affordability and acceptability testing. Our CSP has specifically focused on the development of our social tariff and other affordability measures. Our ESP has focused on how we will reduce consumption and our wider environmental strategy in the context of climate change.
Timely - Customers can challenge on a timely basis with companies responding within a reasonable period	The draft WRMP follow a statutory process which specifies the consultation period and publication of a statement of response to be no more than 26 weeks. This was extended by four weeks through agreement with our regulators.

- Challenge arrangements should allow sufficient time for effective challenge	Our Ambition and Priorities survey was open for two months. The Your Water Your Say session was publicised for six weeks in advance of the session and the write up was published in-line with Ofwat's requirements.

E. Assurance of our customer engagement

15. Company boards should provide assurance of the quality of customer engagement and that customers views have been taken into account of in business plans and long-term delivery strategies.

Ofwat's standards	SES Water action
Independent - Assurance of the quality of customer engagement and how companies have used the findings should be provided independently of the companies with no restriction on reporting - Companies should not input to or review the assurance before it is issued - Assurance should contain clear statements and evidence that the process was conducted independently of the company.	Assurance was carried out by our CSP and led by its Chair Steve Crabb and research expert Beryl Wall.
Transparent - Companies should share all relevant customer engagement and research evidence to the assurer - Information shared should be factual, objective, and comprehensive, not selected or interpreted - Companies should be able to demonstrate how they have taken account of evidence from customer engagement - Companies should be able to explain why they have not taken account of evidence from customer engagement or research	The outputs of our customer engagement have been shared via SharePoint with all the other water companies and interim long-term priorities were shared with CCW and Ofwat during the PR24 process. Following the LTDS priority work we shared the outputs of the survey with our customers via an email invite to comment on them and shared with our CSP and online panel. SES is also committed to publishing the outputs of the customer engagement on our website.
Expert - Assurance should be undertaken by people or organisations that have relevant expertise and are appropriately resourced	Assurance was carried out by our CSP and led by its Chair Steve Crabb and research expert Beryl Wall.

Comprehensive - Assurance needs to assess the extent to which the company's customer engagement meets the standards for high quality research, including how it has applied the best practice for triangulation	SES engaged with a number of market research agencies to eradicate any bias in the research. We also regularly et with our ESP and CSP chair and the research expert who carried out assurance led by the CSP chair Steve Crabb.
Board ownership - Company boards should demonstrate oversight of the customer engagement assurance process - They should be shown and review evidence from customer engagement and research - Should develop confidence that that company decisions that into account of customers' views - Satisfy themselves that company proposals and long-term delivery strategies are based on high quality research and engagement - Should be prepared to provide a statement that the company engagement and research meets the statements of high-quality research	The customer engagement programme has been discussed regularly with the Board, with all research reports and outputs shared. The independent NED has been involved in reviewing research material ahead of publication and has reviewed all evidence from customer research and engagement. The CSP and ESP chairs attend the Board regularly and have presented interim reports to it, ahead of its final PR24 assurance report.

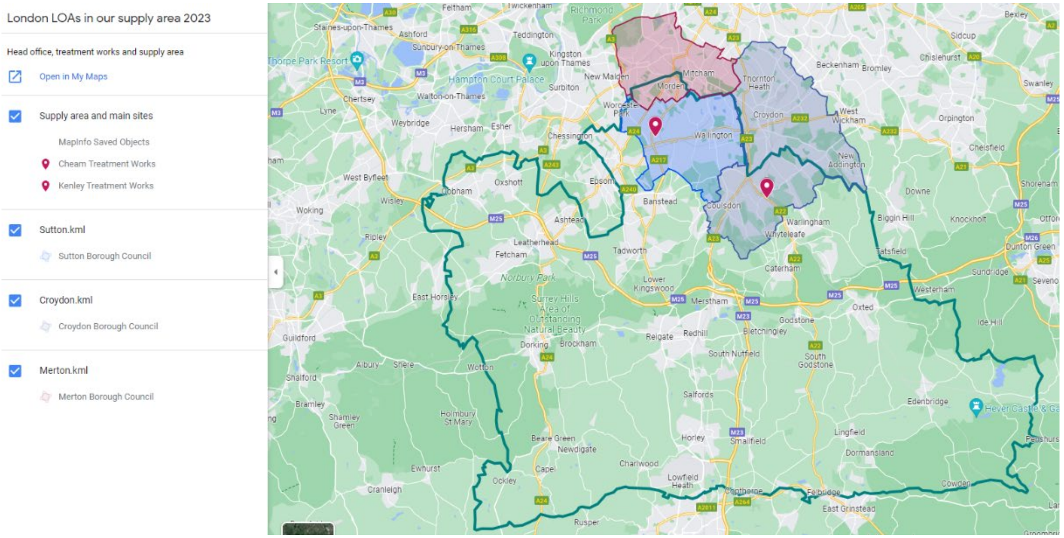
E. Customer demographics

The area we serve

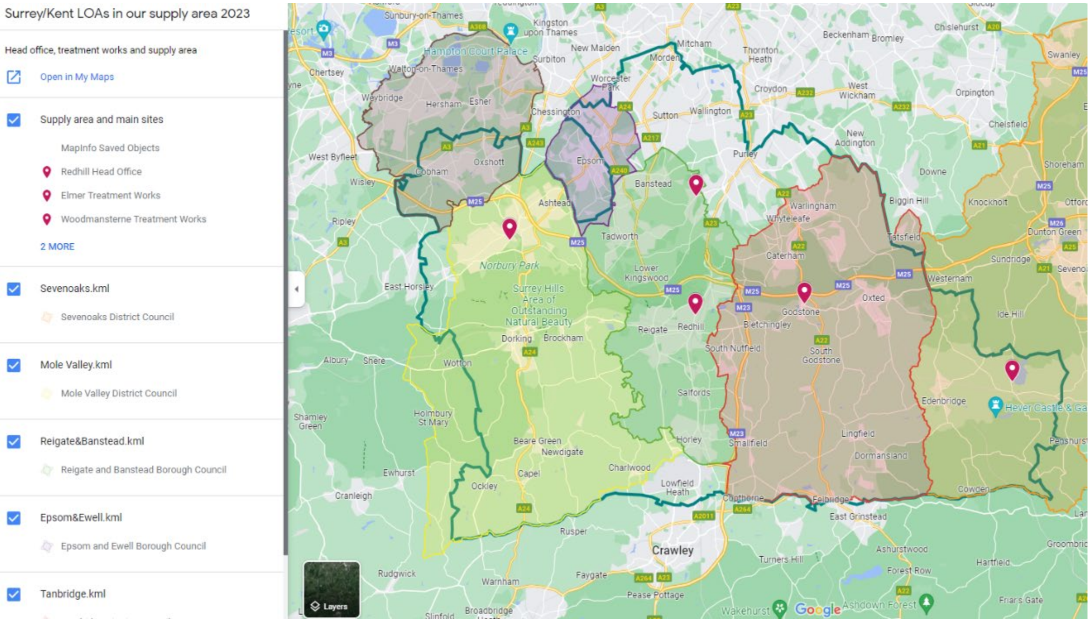
1. SES Water supplies drinking water to 750,000 customers. Our supply area covers 322 square miles extending from Morden and South Croydon down to Gatwick in the south, and from Cobham, Leatherhead and Dorking in the west, to Edenbridge in the east. Our supply area covers 0.6% of England as a whole, yet we supply water to 1.1% of the population. This small geographic area contains several geographic and customer demographic differences.

During recent years we have invested in improving our understanding of and engagement with our customers. We have established a dedicated customer insight and analysis team, as well as upgraded our IT and data analysis capability. We have partnered with leading consumer data company CACI, to purchase Acorn demographic data and the Ocean consumer database which provides insight on a wide range of demographic, digital, lifestyle and attitudinal characteristics at a household level. Using this data is enabling us to understand our customer base at a far more granular level as well tailoring our approaches across different user cases within our business.

Our supply area covers parts of 11 Local Planning Authority (LPA) areas of which nine are key and make up 99.4% of all our customer accounts. We have three London based LPAs – Sutton, Merton, and Croydon. They contain our treatment works in Cheam (Sutton) and the Kenley Treatment works (Croydon). These three LPAs make up less than 15% of our supply area but due to their high population density ~4.7k per square km, 44.5% of our customers are found in this area.



The six Surrey and Kent LPA's are Sevenoaks (which contains our main reservoir, Bough Beech), Tandridge (containing our Godstone treatment works), Reigate and Banstead (within which our head office at Redhill is based, as well as our Woodmansterne treatment works), Mole Valley (where our treatment works at Elmer can be found), Epsom and Ewell and finally Elmbridge. 54.9% of our customer are from within these six LPA's.



The population density in these areas is far lower than our London LPAs, at just under 900 people per square kilometre. The two sections not covered by these LPAs in the south (Crawley) and in the West (Guildford) account for the remaining 0.6%.
Unsurprisingly, the population density reflects that the London areas are far more urban and built up compared to the greener, more rural areas of Surrey and Kent. This is starkly illustrated when we look at the make-up of the residential properties in these areas. In our London LPA's 57.1% of the houses are flats or terraced housing vs. 38.6% in Surrey/Kent. This presents challenges to us from a metering perspective, as it is typically harder to instal meters in flats as they often need to be fitted internally, rather than at the boundary of the property. We also must ensure the routes for meter readers to follow are suitable. Consequently, our London LPAs are currently at 63.98% metered vs. 72.54% in the more rural and easier to access Surrey and Kent LPA's.

The customers we serve

The demographic makeup of our customers living within the different geographic areas varies considerably. Using the CACI ACORN data analysis, 46.7% of our Surrey/Kent customers are in the affluent achiever category vs. 31.5% in our London LPA's. This differential is highlighted further by the fact that 24.3% of our customers in the London LPAs are in the bottom two affluence categories vs. 17.3% in Surrey/Kent.
Understanding this type of demographic difference enables us to tailor our approach to different activities. For example, we have developed tailored revenue and debt collection strategies based on our understanding of a household's ability to pay. Where we identify

that customers are potentially struggling financially, we will proactively contact them to talk about the support we can offer and to explore whether they qualify for our financial assistance programme Water Support.

Currently we have more than 13,000 non-household customers. Over 82% of them have less than four employees and, therefore, often act more like household domestic customers. The key industries in which these businesses with <4 employees operate centre on professional, scientific, and IT sectors with construction close behind.

We currently have almost 20,000 customers on Water Support and have committed to supporting 25,000 customers on this tariff by 2025, an increase of 78% over the course of PR19. Our data clearly shows that we have more to do. The percentage of household customers on Water Support is consistent at 6.3% in both main geographic areas of our supply area, despite a higher deprivation index score of 16.3 in the London LPAs compared to 10.7 in Surrey and Kent. We have used this information to build more targeted partnerships with stakeholder organisations working with customers in vulnerable circumstances in our London LPAs, and to build outreach activities with communities that we believe may be underrepresented. We also know that we are not reaching everyone within our supply area who needs extra help today. Our PR24 plan will help us close that gap, including customers where the root cause of financial vulnerability is more transient.

The age of our customers in the two areas is also markedly different. Around 36% of customers in London LPAs are 55 and over vs. 44.6% in the Surrey/Kent areas. This may be influenced by the fact that the more northern parts of our supply area are prime commuter belt for London. The younger demographic in the London LPAs also means that there is a greater propensity for there to be one or more children in the household – 44.1% vs. 37.1% in the Surrey and Kent LPA's. This is important for us to understand not only from the future bill payer's perspective, but also in terms of the education programme we run. Our education centre flow zone is located next to our Bough Beech reservoir in the eastern most part of our supply area, but the data shows that many of the children in our supply area are based in the northern London LPA's. This has informed our thinking about how we run our education programme going forward, to ensure that it is accessible to more of our future bill payers. This will also include schools who are not able to fund school trips to Bough Beech.

Having a better understanding of the make-up of households and the number of people who reside in a property is an important part of understanding household consumption and how water is being used in the home. 62.1% of Surrey/Kent LPA households consist of one or two people vs, 54.1% in London LPAs. Having this knowledge will allow us to adapt and target more effectively communications around water usage, making them more relevant to our customers, and when combined with data from smart meters, provide direct and tailored support to them.

Another service area that may be influenced by the age of our customers is whether they need the additional support offered through our Priority Services Register (PSR). Just over 12% of PSR registered customers have a nominee contact, and a similar amount are experiencing a chronic/serious illness. 8% are experiencing mental health challenges and a further 8% are water dependant. Due to the range of additional needs that we are required to deal with, additional training courses are run for staff to make them better equipped. Recent examples include dementia awareness and safeguarding training from Surrey Fire and Rescue.

Like our Water Support scheme, our PSR shows little difference between the total number of customers registered who live in the London LPAs (7.2%) vs Surrey and Kent (7%). However, whilst the overall percentage is similar, there is a difference in age bands.

Surrey, with its older demographic, has a greater percentage of customers on the PSR due to being over pensionable age, compared to qualifying through having young children. In the London LPAs, the reason is more likely to be transient.

Our supply area displays a wide variety of customer ethnicity and the languages they speak. In the London LPAs, 28.8% of our customers identify as being non-white vs. 4.2% in the Surrey/Kent area. We offer the ReciteMe service on our website, which our customers have used to view information about SES Water in 47 different languages in the past 12 months. Making all our communications more inclusive and helpful to everyone is a priority for us. We are partnering with organisations representing customers with specific communication needs to drive improvements in this area today.

For customers who do not wish to interact with us digitally, we continue to offer telephone-based services and face to face visits at our office in Redhill. We also provide training to our advisors to help them adapt their service to customer needs. We have increased the diversity of this team so that it is more representative of our customer base. We recognise however that not all customers contact us to ask for support. We will continue to expand our community outreach programme delivered through our team of Community Engagement and Support Officers. We are also partnering with a growing number of other private and public organisations that are already in contact with customers and communities that we have traditionally found harder to reach.

Our service today

Our service differs as different customer groups have distinct needs, usage patterns, and requirements. Our services might differ based on:

Ability to pay: we have tailored debt collection strategies depending on a customer's ability to pay. Our advisors are trained to carry out an income and expenditure assessment on any payment related call and are empowered to set up genuinely affordable payment plans for as little as £1 a month where customers are struggling to pay.

Vulnerability: customers with specific types of vulnerability including those who are water dependent for medical reasons or who may struggle to use water stations receive extra help such as home deliveries of bottled water in an incident. We proactively ask customers if they have any specific needs when they contact us and may prioritise handling their case when a customer is in vulnerable circumstances, for example if they make a complaint to us.

Communication preferences: when customers contact us, we ask how they would prefer us to contact them, so we use their preferred channel where possible.

Household size: we ask customers how many people live in their household and use this information to better understand usage patterns. We then offer appropriate advice about water saving options and the potential benefits of metering, where they do not already have a water meter.

Age: our younger consumers sometimes visit our education centre Flow Zone at Bough Beech reservoir. Those who are more elderly or in special circumstances receive visits from our Community Engagement and Support Officers to make sure the service we offer is appropriate.

We offer flexibility to ensure that each group's specific needs and expectations are met effectively. This segmentation allows us to cater for diverse customer requirements and optimize the delivery of our services.

Our customers of tomorrow

The Office of National Statistics expects the overall UK population to grow by around 3.2% by the mid 2030's. If this figure were to hold true in SES's supply area, that would mean an increase of 9.2k households over 10 years. The projection asserts that this growth will almost entirely be driven by people moving into the area. It is expected that our customer demographic age will increase as the baby boomer generation reach older age. Therefore, it is critical we make sure our financial support and PSR schemes are fit for purpose and have the necessary funding. Additionally, we must ensure the resilience of our network is maintained as the need of water for medical treatments like dialysis will increase. Finally, in a world of digitisation we must consider carefully our service offering so as not to alienate those who are digitally disadvantaged. Our plan addresses how we will ensure we proactively capture and cater for these changing needs over the next five years.

	Area	London LPAs	Surrey/Kent LPAs
	Vol of Accounts	**131,945**	**163,071**
	% of accounts	**44.5%**	**54.9%**
Ethnicity	Asian or Asian British	13.48%	4.20%
	Black, African, Caribbean, or Black British	9.33%	1.17%
	Mixed or multiple ethnic groups	4.61%	2.08%
	White	71.18%	92.03%
	Other ethnic group	1.49%	0.57%
Population Density	People per sq. km	4,723	893
Age banding	18-24	9.00%	9.35%
	25-34	18.12%	13.03%
	35-44	19.45%	15.47%
	45-54	17.42%	17.52%
	55-64	15.68%	18.46%
	65-74	11.26%	13.49%
	75+	9.07%	12.68%
Household size	1 person	25.62%	25.67%
	2 persons	28.49%	36.43%
	3-4 persons	37.82%	32.07%

	5+ persons	8.06%	5.81%
Income brackets	0-9,999	5.75%	3.38%
	10,000-19,999	12.32%	10.58%
	20,000-29,999	13.82%	13.76%
	30,000-39,999	13.38%	13.15%
	40,000-49,999	11.84%	9.76%
	50,000-74,999	18.80%	20.29%
	75,000-99,999	12.70%	14.38%
	100,000+	11.39%	14.70%
No. of Children	0	55.89%	62.89%
	1	18.12%	15.15%
	2	19.62%	17.10%
	3+	6.38%	4.84%
House type	Bungalow	3.97%	6.93%
	Detached House	10.64%	25.75%
	Flat or Maisonette	29.63%	19.81%
	Semi-detached House	28.28%	28.73%
	Terraced House	27.48%	18.79%
Employment status	Employee	54.13%	53.79%
	Not Employed	36.21%	37.53%
	Self Employed	9.66%	8.68%
Social grade	A	3.88%	6.32%
	B	22.76%	31.91%
	C1	28.29%	30.06%
	C2	21.17%	17.54%

	D	14.91%	9.40%
	E	9.00%	4.77%
Internet use	Frequent	53.02%	59.69%
	Light	1.70%	1.62%
	Moderate	45.28%	38.68%
Measured?	Metered	63.98%	72.54%
	Unmetered	36.02%	27.46%

1.

	Area	**London LPAs**	**Surrey/Kent LPAs**
	Vol of Accounts	**131,945**	**163,071**
	% of accounts	**44.5%**	**54.9%**
Inbound Contact	% total contact	22.09%	13.56%
	Telephone %	59.29%	56.82%
	Email %	21.77%	24.19%
	Webform %	14.95%	15.41%
	Letter %	3.97%	3.59%
Contract group	Account Enquiry	23.09%	13.89%
	Payments	25.54%	12.09%
	Change of Address	22.24%	14.61%
	Extra Care	24.00%	12.68%
	Consumption Query	19.09%	15.58%
	Billing Enquiry	22.62%	14.04%
	System	24.78%	12.70%
	Direct Debit	21.98%	14.78%
	Leak	18.20%	14.93%
	Metering	21.52%	10.76%

Developer Services	22.51%	13.52%
Supply Issues	16.35%	15.94%
Apparatus	15.86%	15.87%
Network Contact	17.62%	15.74%
Customer Moves	21.95%	14.78%
Account Adjustment	18.55%	15.36%
Meter	19.22%	14.97%
Referrals	22.11%	13.71%
Information Given	20.31%	15.05%
Debt	27.56%	11.93%
Company Works	14.03%	17.02%
Int	21.03%	14.50%
Water Quality	17.99%	16.34%
Customer Feedback	22.18%	14.97%
Post	21.48%	14.69%
MyAccount	22.23%	13.68%
Complaint	20.23%	14.68%
Debt Recovery	25.19%	13.56%
Appointments	22.46%	13.39%
Escalation	18.95%	16.12%
Water Efficiency	21.54%	13.42%
Incident	10.65%	18.41%
Leak Adjustment	19.80%	14.76%
Breathing Space	27.19%	12.89%

	CC Water	19.38%	16.19%
	Environmental Concerns	18.93%	13.78%
	New Build Customer Info	9.77%	12.63%
	UMP - Post Installation Contact	14.38%	5.08%
	Efficiency Devices	13.25%	16.87%
	Sundry Income	32.38%	10.55%
	Assessed Household Charge	29.12%	12.12%
	Email	37.41%	8.01%
	UMP - Pre-Installation Contact	25.80%	0.00%
	No Info	18.83%	16.35%

1.

	Area	**London LPAs**	**Surrey/Kent LPAs**
	Vol of Accounts	**131,945**	**163,071**
	% of accounts	**44.5%**	**54.9%**
Water support	Count of water support	8,342	10,293
	%of Area	6.32%	6.31%
Deprivation	Index score	16.3	10.7
Acorn scores	Other	2.54%	3.96%
	Affluent Achievers	31.51%	46.74%
	Rising Prosperity	14.93%	12.30%
	Comfortable Communities	26.49%	19.73%
	Financially Stretched	9.01%	12.13%
	Urban Adversity	15.52%	5.14%
PSR reason	Financially Vulnerable	20.30%	17.90%
	Nominee Contact	12.68%	11.84%

Chronic / Serious illness	11.42%	13.70%
Mental Health	8.12%	8.26%
Water Dependant	7.19%	8.25%
Temporary - Life Changes	6.24%	4.72%
Pensionable Age	4.12%	4.65%
Families with Young Children 5 or Under	3.43%	2.95%
Loss of Supply Notification	2.60%	3.19%
Hearing Impairment	3.25%	3.93%
Developmental Condition	3.06%	3.42%
Physical Impairment	2.57%	2.71%
Unable to Answer Door	2.52%	2.64%
Dementia/Cognitive Impairment	2.15%	2.47%
Partially Sighted	1.92%	1.97%
Large Print Bills	1.13%	1.01%
Speech Impairment	1.15%	1.19%
Unable to Communicate in English	0.87%	0.46%
Restricted Hand Movement	0.75%	0.61%
Temporary - Post Hospital Recovery	0.66%	0.58%
Password	0.62%	0.51%
Blind	0.56%	0.58%
Temporary - Young Adult Householder (<18)	0.40%	0.25%
Dialysis, Feeding Pump and Automated Medication	0.34%	0.28%
Medical Dependant Showering	0.43%	0.41%
Additional Meter Read Service	0.28%	0.30%

	Medicine Refrigeration	0.25%	0.25%
	Heart, Lung & Ventilator	0.29%	0.36%
	Text Relay	0.13%	0.14%
	Nebuliser and Apnoea Monitor	0.11%	0.12%
	Stair Lift, Hoist, Electric bed	0.11%	0.08%
	Oxygen Use	0.12%	0.04%
	Braille Bills	0.08%	0.05%
	Audio CD Bills	0.03%	0.09%
	Careline / Telecare System	0.04%	0.02%
	Oxygen Concentrator	0.06%	0.03%
	Poor Sense of Smell and/Taste	0.01%	0.02%
	Additional Presence Preferred	0.02%	0.01%