

A large circular graphic composed of various white line-art icons on a teal background. The icons include a person with a headset, a cloud with circuit lines, a "net zero" circle with a leaf, a checkmark in a circle, a target, a microscope, a person at a presentation board, a hand holding a water drop, a globe with a thermometer, a group of people with an upward arrow, a leaf, a person silhouette, a scale, and a glass of water. The central text is overlaid on a white circle within this graphic.

**APPENDIX  
SES015  
CUSTOMER  
INSIGHT  
SYNTHESIS AND  
TRIANGULATION**

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# APPENDIX SES015: CUSTOMER INSIGHT SYNTHESIS AND TRIANGULATION

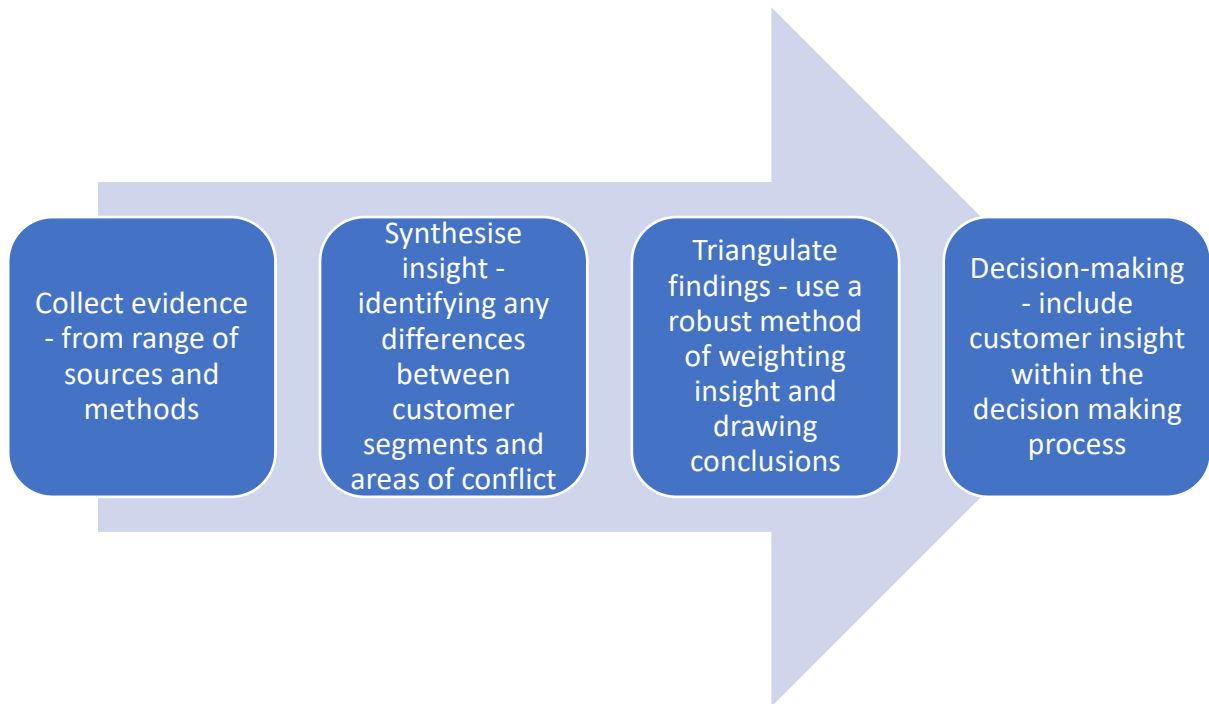
This appendix documents the summarised outputs of the customer research we have used to inform our PR24 business plan. It explains our approach to triangulation and how we have weighted and assessed different pieces of research. We have provided commentary on the outputs of our triangulation exercise for the main areas where insight has influenced our business plan.

## A. Background and purpose of this appendix

1. Our PR24 business plan will set out how we will continue to deliver our day-to-day service to customers and identify where we need to invest for the future between 2025 and 2030. Our plan must take account of customers' needs, priorities, and preferences.
2. Reflecting a clearer understanding of customers and communities is one of Ofwat's four key ambitions for PR24. It builds on activity at previous price reviews to put customers at the heart of decision making.
3. Another ambition for the PR24 price review is to increase the focus on the long-term. This is being achieved through the development of our long-term delivery strategy (LTDS) that look 25 years ahead and will be used to help inform investment decisions at PR24 and subsequent price reviews. These strategies must reflect the ambitions of our customers and their preferences. Therefore, our customer insight serves the dual purpose of informing both our LTDS and PR24 plan as the two are inter-linked.
4. 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: Insight analysis and triangulation process**



Source: SES Water

- This document brings together and synthesises the evidence – customer and stakeholder insight – from all the sources we have considered. It supports Chapter 5 Our customers and should be read in conjunction with Appendix SES014 Our customer research and engagement programme which provides details of all the engagement activity that has contributed to this synthesis and informed our PR24 plan.

### The role of customer insight in the development of our PR24 business plan

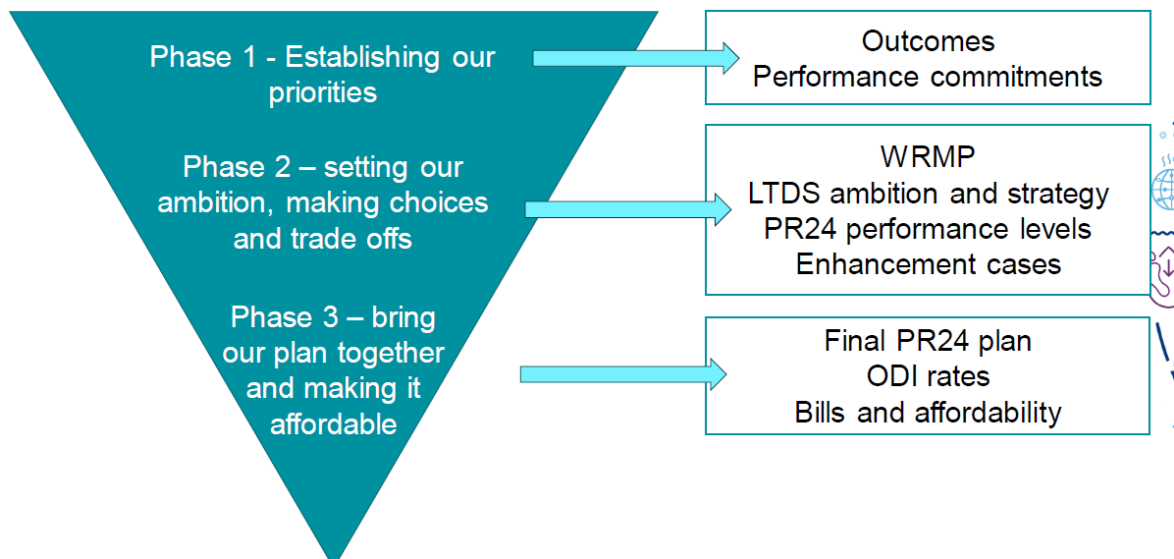
- We share Ofwat’s ambition that our business plan reflects a clear understanding of our customers and communities. We are using enhanced analysis of the demographics to inform the insight we carry out, so it is fully representative of the customers and communities we serve. Further detail on our customers’ can be found in Appendix SES014 Customer Research Programme - Research summary and methods inc. Customer Demographics.
- The main channels of insight that have been used to inform our LTDS and PR24 plan include:
  - BAU research channels
  - Company-specific research conducted outside of the price review
  - Ofwat/CCW collaborative research to inform the PR24 price review
  - Company-specific research to inform the PR24 price review
  - Third party insight sources
- The Southeast water companies also undertook a new approach at PR24 to work more collaboratively and share research insight. To increase the value of customer evidence, a SharePoint site was set up where all companies made its research findings available.
- We compared other’s research findings with our own to develop our understanding of customer views, preferences and experiences. We participated in regular calls with the



other Southeast water companies – around once a month – and longer meetings in October 2022, July 2023 and August 2023, where we shared our understanding of customers’ priorities from different projects and insights triangulation. This helped us understand where and why there was consistency or differences across the region. For us, the key difference was that supply interruptions featured 8th on the list of customer priorities which was much lower than other Southeast companies. This is reflective of our comparatively better performance in this area which means it is less of an urgent issue for our customers. Ofwat and CCW have attended some of the sessions as well.

10. Finally, this collaborative approach allowed for conversations around best practice. We followed suggestions from CCW to review the social tariff research conducted by United Utilities and Thames Water to help inform our own social tariff research to make it the best it could be.
11. We have also provided customers with opportunities to challenge our plan, the feedback from which has contributed to its development. These research sources are summarised in Appendix SES014.
12. Our engagement for PR24 has taken a three-stage approach, each of which has informed a different element of our business plan as summarised in Figure 2.

**Figure 2: Summary of our three-stage engagement process**

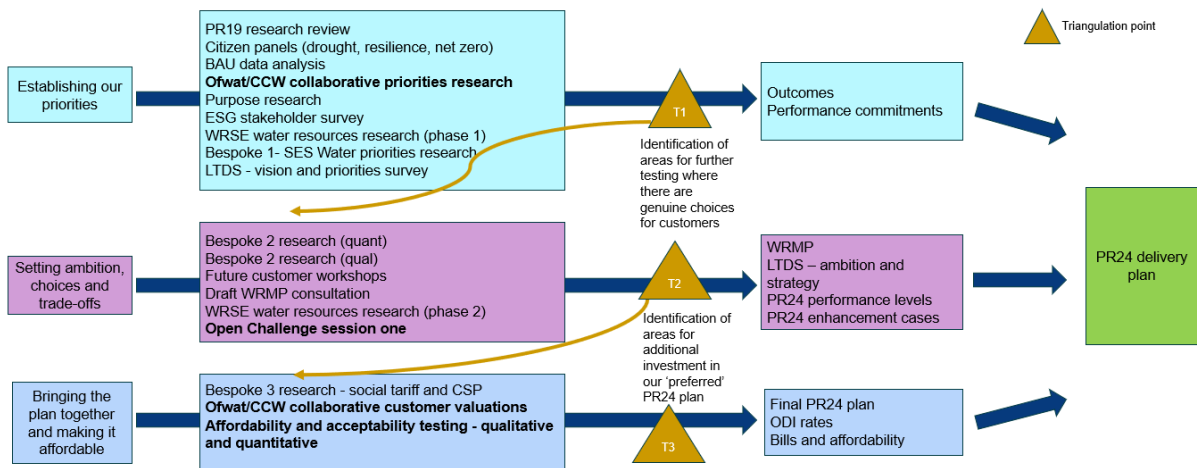


Source: SES Water

13. Our approach reflects where customers can have the most meaningful impact on our plan and has focused on carrying out high-quality research in the areas where there is most opportunity for customers to influence what we deliver.
14. Figure 3 summarises how our research activity, detailed in Appendix SES014, fits into this process and the areas of our PR24 plan and our long-term deliver strategy it has influenced in our PR24 plan.



**Figure 3 PR24 research and engagement process**



Source SES Water

15. It has been an iterative process, where we have continued to build on our understanding of customers priorities and preferences to inform or decisions at the different stages and to ensure the 'golden thread' of insight is followed through the process.

### About this appendix

16. This report provides:

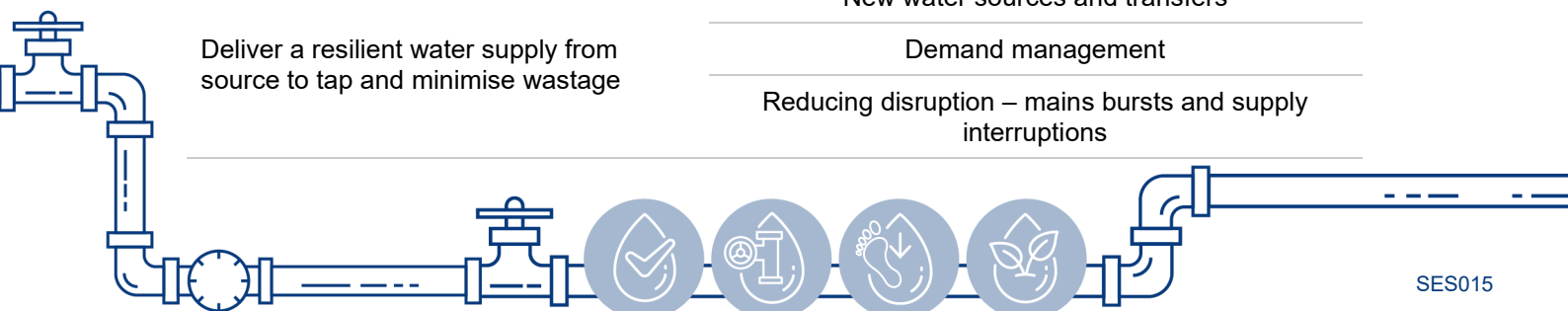
Our synthesis of customer insight across the key areas of our plan

The triangulation of our findings which we have used to inform the decision-making process.

17. For the purposes of this report, we have summarised the insight against the four priority areas that were identified in our Long-Term Delivery Strategy - Priorities and Ambition document published in October 2022.

**Table 1: Customer priority areas**

Priority area	Topic
Provide you with high-quality water from sustainable sources	Water quality (WINEP)
	Taste, smell and appearance
	Lead
	Softening
	Sustainable abstraction (WINEP)
	Alternative sources – greywater recycling/rainwater
Deliver a resilient water supply from source to tap and minimise wastage	New water sources and transfers
	Demand management
	Reducing disruption – mains bursts and supply interruptions



	Reducing leaks
	Resilience of assets to climate change
Help you reduce your water footprint and charge a fair, affordable price for what you use	Influencing customer behaviour
	Customer experience and channels
	Affordable bills and social tariff
	Supporting customers with additional needs
Improve the environment and have a positive impact on our local area	Net zero
	Biodiversity
	Wider environmental impact (WINEP)
	Accessible sites
	Education
	Community support

Source: SES Water

## Scoring the insight

18. In producing this report, we have reviewed several sources of primary research conducted since the PR19 business plan. (See Appendix SES018 Customer Research Output Reports) Each criteria includes one of the eight CWW principles of good quality research, as well as one of element of Sia Partners six recommendations for good practise triangulation. Each piece of research has been assessed and scored against four separate criteria:

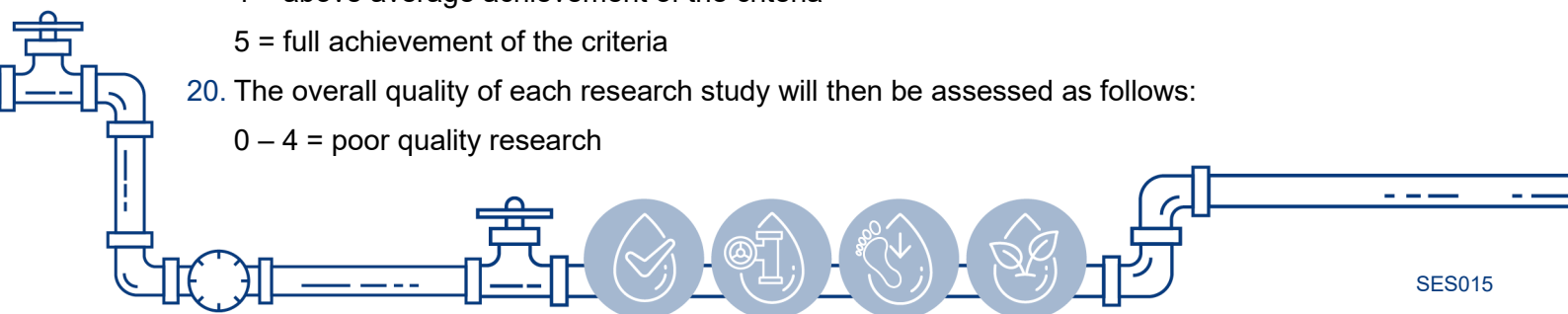
- (a) **Representative and inclusivity** - this includes CCW’s principles of *‘neutrally designed’* and *‘inclusive’*
- (b) **Robustly gathered and undertaken** – this includes CCW’s principles of being *‘fit for purpose’*, *‘neutrally designed’* and *‘ethical’*, as well as Sia Partner’s recommendation *‘making use of a wide range of inputs’* and *‘allows for balanced decision making’*
- (c) **Effectively reviewed and analysed** – this includes CCW’s principles of *‘useful and contextualised’*, *‘independently assured’* as well as Sia Partner’s *‘Validation of findings should make use of wide range of datasets’* and *‘seek independent assurance’*
- (d) **Contribution to the plan** – this includes CCW’s principle of *‘continual’* and *‘shared in full, with others’* as well as Sia Partner’s *‘ongoing process’*.

19. To score the research studies, all four criteria are allocated a score between one to five as follows:

- 1 = does not achieve any part of the criteria
- 2 = below average achievement of the criteria
- 3 = average achievement of the criteria
- 4 = above average achievement of the criteria
- 5 = full achievement of the criteria

20. The overall quality of each research study will then be assessed as follows:

- 0 – 4 = poor quality research



- 5 – 9 = below average quality research
- 10 – 13 = average quality research
- 14 – 17 = good quality research
- 18 – 20 = excellent quality research

### Sources of insight

21. In producing this report, we have reviewed several sources of research and engagement. Full details of our research and engagement programme, customer challenge and assurance can be found in Appendix SES014. Below we provide a summary description of each insight source and the score it has received in our assessment.

**Table 2; Source of insight used at PR24**

Code	Insight	Date	Nature of insight	Score
PR1	SES Purpose research	May 2021	Company-specific research (outside price review)	15
PR2	SES Water Citizens Panel	August 2021	Company-specific research (outside price review)	12
BAU1	Voice of the Customer	Annual tracking, 2020-21, 2021-22	Company-specific research (outside price review)	
CR1	Water resource management plans for WRSE (phase 1)	Aug 2020 – March 2021	WRSE companies collaborative research	18
CR2	Ofwat /CCWater customer priorities research	April 2022	Collaborative industry research (price review)	N/A
PR3	SES Water customer priorities	August 2022	Company-specific research (price review)	16
PR4	ESG Materiality Assessment	August 2022	Company-specific research (outside price review)	11
CR3	Customer valuations research		Collaborative industry research (price review)	N/A
PR5	Future customer priorities and choices	February and March 2023	Company-specific engagement (price review)	17 or 18





PR6	Bespoke 2 Customer choices - level and pace of ambition	May 2023	Company-specific research (price review)	18
PR7	Social tariff research	August 2023	Company-specific research (price review)	
PR8	Affordability and Acceptability Testing	June to August 2023	Company-specific research (price review)	
PR9	Small company premium research	July/August 2023	Company-specific research (price review)	

Source: SES Water

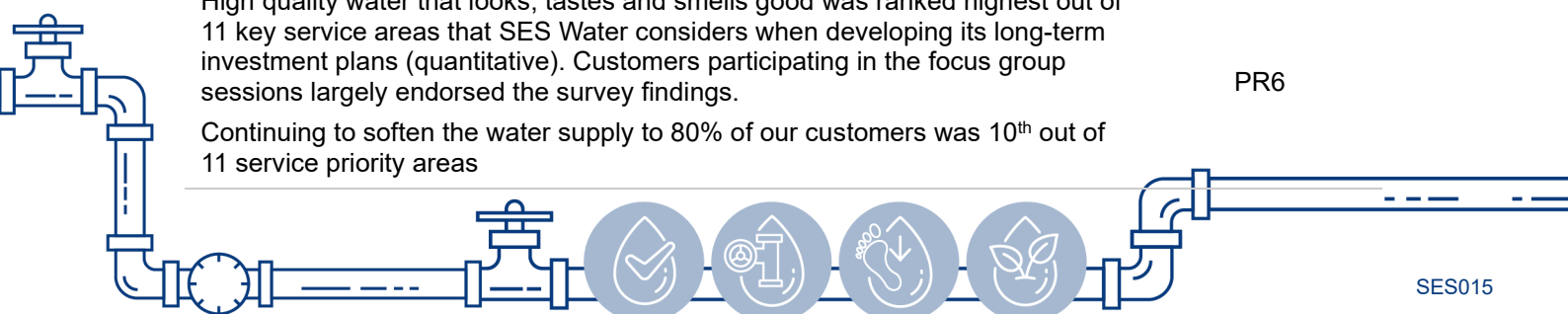
## B. PR24 Insight synthesis

22. In this section we present a synthesis of all the evidence we have collected through our customer research and engagement programme, organised into our four priority areas.

### Provide high-quality water from sustainable sources

**Table 3: Insight synthesis - Provide high quality water from sustainable sources**

Insight since PR19 to inform PR24	Source
High water quality is essential – keeping our natural water supplies free from pollutants and chemicals is an urgent priority, both by eliminating lead pipes and collaborating with third parties, The level of cost and disruption to replace all lead pipes was recognized by people, but they still wanted it prioritised. There is an acknowledgement that collaborating with farmers on pollution was challenging	PR3
Quality water scenarios (e.g. aesthetics), along with reliability of supply, were the areas where customers wanted SES to be most resilient	PR2
Satisfaction with water colour provided by SES (1-VD, 5-VS) HH 2020-21 4.74; 2021-22 4.74 Satisfaction with taste & smell of water provided by SES (1-VD, 5-VS) HH 2020-21 4.48; 2021-22 4.55	BAU1
SES should be an outstanding water company that delivers service excellence	PR1
The taste, smell and appearance of tap water is in the highest importance category, as is a do not drink notice. A boil water notice is in the middle importance category, as is lead and pollution.	CR2
Future customers felt that the risk associated with lead was currently being managed but were supportive of the company targeting buildings such as schools and nurseries because of the higher risk to young people. They felt that full lead replacement was highly challenging and would be difficult to achieve.	PR5
High quality water that looks, tastes and smells good was ranked highest out of 11 key service areas that SES Water considers when developing its long-term investment plans (quantitative). Customers participating in the focus group sessions largely endorsed the survey findings. Continuing to soften the water supply to 80% of our customers was 10 <sup>th</sup> out of 11 service priority areas	PR6



42% of customers did not report any service problems over the last 5 years; concern about hardness is the highest reported service issue; 60% of customers reporting an issue included softening in their top 5 priorities

Out of the 11 key water service areas, the majority of customers support the top three priorities for key water services - **74%** of household customers selected **high quality water** as one of their priorities; **66%** selected **leakage** and **affordable bills** and **58%** also selected **ensuring there is enough water** to reduce the risk of restrictions during drought

Of the five investment areas where there were clear choices for customers to influence the pace and level of investment, and prior to any bill impacts being shown, lead was seen as the third most important priority to invest in, with 76% saying it was important or very important to invest in. Support was broadly consistent across age, location and socio-economic groups, but awareness varies with age, falling to only 31% for the youngest age group (18-34 years)

Four lead investment options along with their associated bill impacts were shown to customers. Of these, they prefer **a steady approach to lead pipe replacement over a longer time period**, but do not have a clear preference for either of the two slower options.

Two thirds were aware of lead pipes as supply connections or internal plumbing.

The affordability and acceptability testing research (AAT) showed the importance rank order for each of the proposed business plan elements relating to the 'provision of high-quality water from sustainable sources':

- Stopping nitrates and pesticides entering our water sources and protecting living species in water sources, HH +£0.93, NHH +0.47% = 49% and 42% respectively
- Installation of UV treatment to protect water quality from contamination, HH +£1.73; NHH +0.87% = 24% and 31% respectively
- Replacing lead pipes within schools and nurseries by 2030, HH +£0.97; NHH + 0.49% = 15% and 19 respectively
- Don't know / can't say = 13% HHs and 7% NHHs

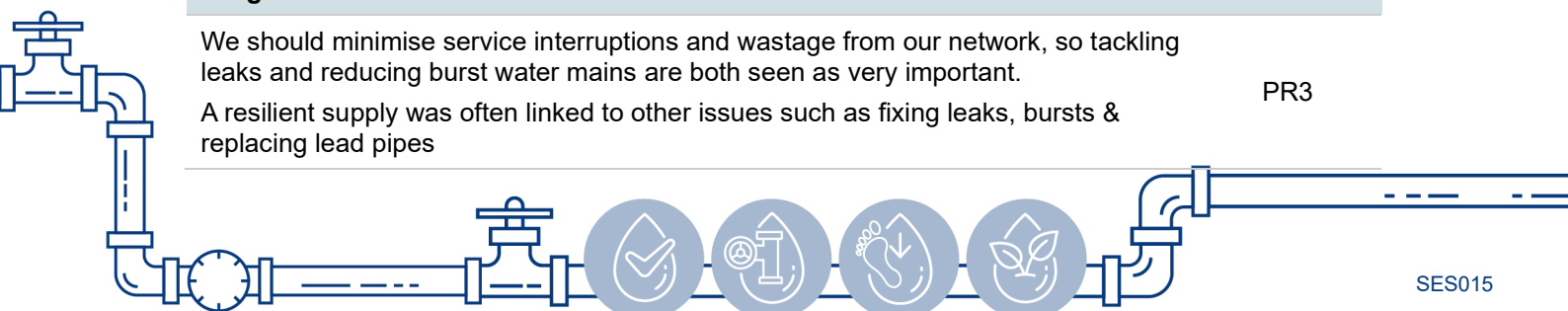
PR8

The key finding from the qualitative part of the AAT research was around lead pipes, with most questioning why replacing them was not mandatory; non-households were particularly concerned

## Deliver a resilient water supply from source to tap and minimise wastage

**Table 4; Insight synthesis - Deliver a resilient supply form source to tap and minimise wastage.**

Insight since PR19 to inform PR24	Source
<p>We should minimise service interruptions and wastage from our network, so tackling leaks and reducing burst water mains are both seen as very important.</p> <p>A resilient supply was often linked to other issues such as fixing leaks, bursts &amp; replacing lead pipes</p>	<p>PR3</p>



People felt that SES should make its existing infrastructure more efficient and that this should happen before we develop new treatment facilities and sources

Some people felt their personal actions to reduce water consumption was inconsequential compared to the amount of water lost by leaks and if the right infrastructure is not in place

There was some pragmatism about leakage levels, others wanted SES to aim higher

In terms of a resilient system, emergency measures to ration water should be avoided at all costs but temporary restrictions to water use (hosepipe bans) are acceptable during droughts.

Customers would rather take preventative behavioural actions earlier in the process than be subject to severe restrictions, especially as the latter meant serious concerns of lifestyle changes. Overall, there was a level of acceptance of levels 1 & 2 of the drought plan (education & TUBs), but there are serious concerns about levels 3 & 4 (drought permits & severe restrictions (e.g. rota cuts)

15% water loss is surprising and a high level of importance attached to reducing it, especially in the context of helping to prevent a drought

Reliability of supply scenarios (e.g. unplanned interruptions), along with quality water, were the areas where customers wanted SES to be most resilient

PR2

There was little awareness about water abstraction and the changing nature of demand, but customers were impressed with the SES's ability to cope

20 out of 21 agreed/strongly agreed that SES should use demand led approaches to reduce water usage before abstracting more from rivers

15 out of 16 said they trust that SES understand the likelihood of events that could cause a break in their service, now and in the future

16 out of 16 trust that in the event of various resilience scenarios, SES would know what to do to ensure a continues service

In terms of water resources customers want an acceptable balance of demand and supply options - Ensuring the current system is efficient is the starting point. Practically this means reducing leaks and removing constraints in the water supply network.

In the short-term efforts will be focused on being more efficient with the water that is currently supplied and helping customers use less water, along with actions that deliver wider benefits and public value, such as catchment management initiatives; and

Over the longer-term new resource schemes will be the cornerstone of the plan because gains from leakage reduction can only go so far and significant reductions in demand cannot be relied upon. For supply options the driving preferences are certainty and avoiding significant environmental impacts

CR1

Minimising risk to the system - the long-term plan will place more weight on options that safeguard supplies and reduce risk of disruption with a high degree of certainty.

A balanced plan is most preferred – one which has a mix of options to reduce demand and increase supply; where system has bigger buffer to cope with disruption but is less flexible to future changes; less likely that extra water is taken from rivers during a drought; could mean some changes to lifestyles and how water is used. Cost c. £14 a year

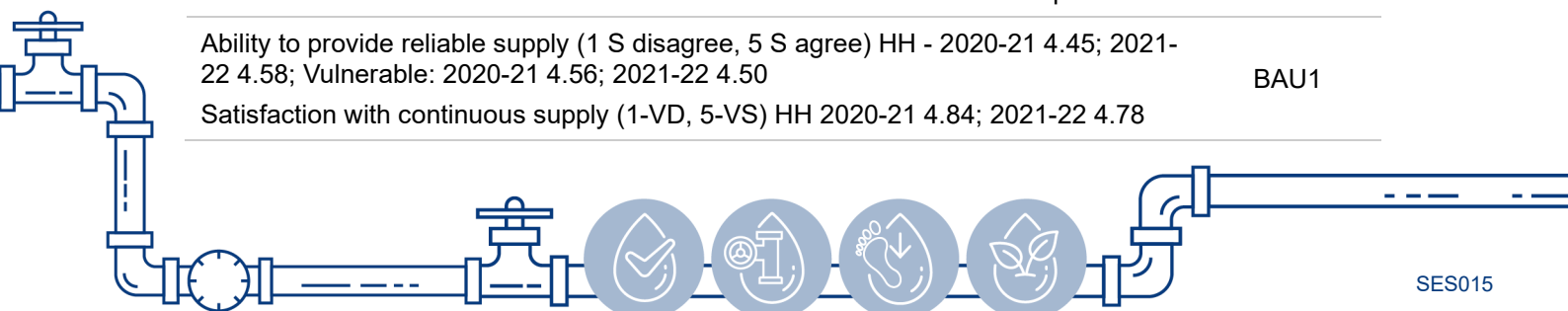
Securing long-term water resources is crucial for the environment and people; It is the core of the business and interrelates with all kinds of other relevant topics

PR4

Ability to provide reliable supply (1 S disagree, 5 S agree) HH - 2020-21 4.45; 2021-22 4.58; Vulnerable: 2020-21 4.56; 2021-22 4.50

BAU1

Satisfaction with continuous supply (1-VD, 5-VS) HH 2020-21 4.84; 2021-22 4.78



Supply interruptions is in the highest importance category to customers. Leakage and resilience are in the middle importance category, the latter being mentioned spontaneously by customers, Water pressure, hose pipe bans, NEUBs and severe droughts are in the lowest importance category

CR2

People seem more tolerant of service interruptions where warning is given. They want to know how they will be affected, how long for, and the water company response time. Strong communication and advance warning help mitigate service interruptions. It seems people may tolerate planned interruptions of longer than three hours if communicated well. This may open the possibility of companies using more low carbon solutions to reduce leakage, that may require longer interruption time

CR2

Some surprise that smart technology was not being used more proactively to predict problems on the network

PR3

SES Water’s supply interruption performance was considered to be good. Short-term focus should be on maintaining this position with long-term ambition to eliminate interruptions longer than 3 hours.

Reducing leakage was a high priority for future customers. They felt that companies should aim to go further than the 50% reduction target by 2050 or achieve it earlier. They supported the company fast-tracking investment in leakage to address it more quickly. They felt that longer-term, new technology would become available to enable them to go even further.

PR5

It was felt that more help should be given to homeowners to repair leaks and there were concerns about people doing more damage when trying to carry out repairs themselves. Ideas included offering insurance policies for customers, as well as helping with the cost of repairs for low-income families, students and other customers who may be struggling financially or have other challenges.

Using smart technology was seen to be important to help find and fix leaks more quickly. The idea that smart technology could help find problems before they happen was seen to be something that should be progressed wherever possible.

Reducing the amount of water that is lost through leakage was the second most important priority, out of 11 key service areas, gaining strong support from 65+ years and 35-64 years (prioritised first and second respectively) but was a lower priority for 18-34 years at 7<sup>th</sup> overall.

Similarly, the two older age groups prioritised ensuring there is enough water to prevent restrictions in the top four, whereas 18-34 years ranked it 8<sup>th</sup>

Both 65+ years and 35-64 years prioritised maintain existing infrastructure as 5<sup>th</sup>, whereas 18-34 years placed it 10<sup>th</sup>

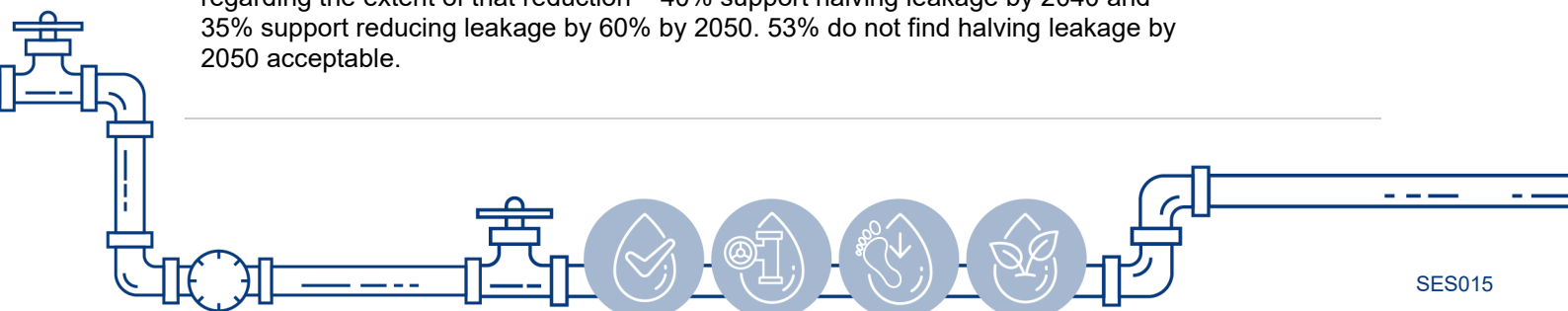
Ensuring properties consistently receive good water pressure was ranked 7<sup>th</sup> out of 11 priority water service areas

In the survey, preventing interruptions to water supply was the 8<sup>th</sup> highest priority out of 11.

PR6

Of the five investment areas where there were clear choices for customers to influence the pace and level of investment, and prior to any bill impacts being shown, leakage was deemed the most important priority to invest in, 91% saying it was important or very important to invest in.

When customers were shown the bill impacts of three leakage investment options, the majority support additional reduction in leakage, but customer support is split regarding the extent of that reduction – 40% support halving leakage by 2040 and 35% support reducing leakage by 60% by 2050. 53% do not find halving leakage by 2050 acceptable.



The AAT survey showed the importance rank order for each of the proposed business plan elements relating to the ‘delivering a resilient water supply from source to tap’:

- Investing in reducing leakage by finding and fixing more leaks, managing pressure and finding leaks on customers’ pipes, HH +£3.73; NHH +1.88% = 47% and 60% respectively
- Working to make our water treatment works to be more secure and enhancing the water quality, HH +£2.73; NHH +1.37% = 29% and 19% respectively
- Schemes aimed at protecting sites from flooding and power outages, HH +£1.78; NHH +0.79% = 9% and 16% respectively
- Don’t know/can’t say = HHs 15% and 4% NHHs

PR8

The main findings from the AAT qualitative research around resilience were that:

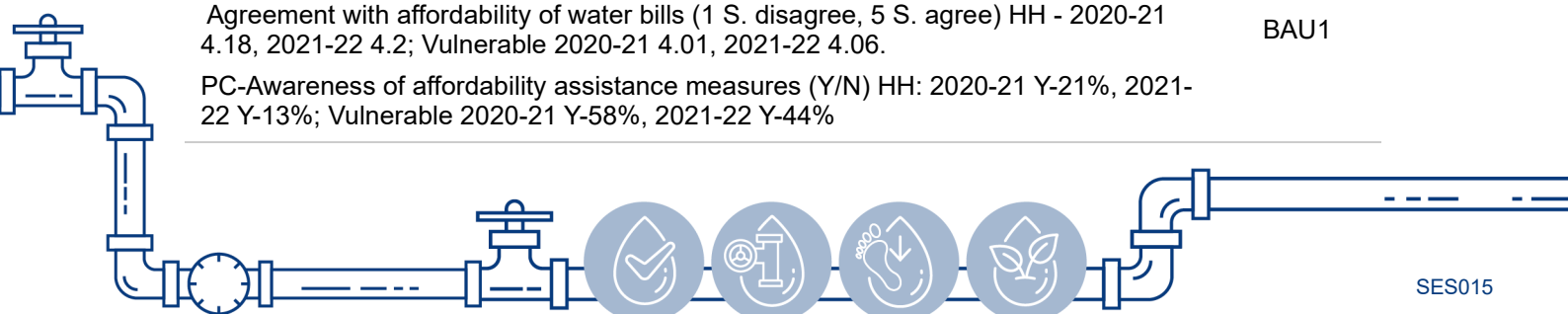
- Leakage was a high priority, and that it was important to fix this issue as soon as possible
- In terms of power outages, why generators were not in place already.

Some non-households made the link that leakage is treated water being lost and felt this was a double blow as money was being spent to treat the water before it gets lost. Similar to households, non-households felt that generators should be standard for us.

## Help you reduce your water footprint and charge a fair, affordable price for what you use

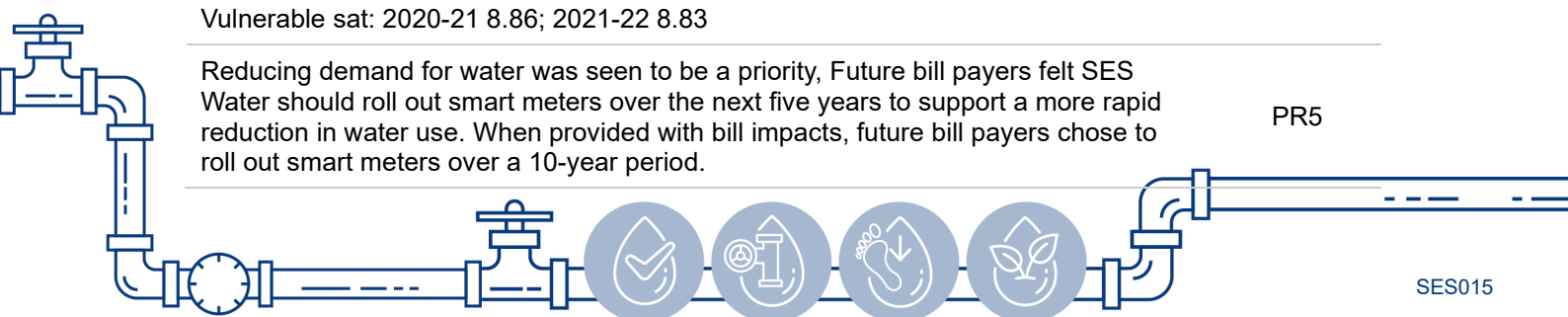
**Table 5: Insight synthesis- Reduce your water footprint and charge a fair and affordable price for what you use**

Insight since PR19 to inform PR24	Source
<p>The breadth of vulnerability and the desire to end water poverty was highly regarded and created a positive halo effect on the company</p> <p>The current cost of living crisis is a major concern - this was the overarching issue for people and the context for their opinions on customer priorities. As such, it is vital that bills should remain affordable for all</p> <p>Incentivisation of reduced water consumption (e.g. National Grid) better than different tariffs</p> <p>Broader support beyond bill payment is welcomed, especially working with charities who are experts, but supporting 20,000 didn’t feel like many people given the scale of vulnerability.</p>	PR3
<p>Affordable for all - The scale of any bill increases accounts for the needs of vulnerable and low-income households, helping to ensure their bills are affordable</p>	CR1
<p>Water affordability &amp; access - Providing a good service creates a positive impact on vulnerable groups and is crucial for the company’s reputation</p>	PR4
<p>PC - Value for money satisfaction (1 VD, 5 VS) HH: 2020-21 4.02, 2021-22 4.05; Vulnerable: 2020-21 4.15, 2021-22 4.17</p>	
<p>Agreement with affordability of water bills (1 S. disagree, 5 S. agree) HH - 2020-21 4.18, 2021-22 4.2; Vulnerable 2020-21 4.01, 2021-22 4.06.</p>	BAU1
<p>PC-Awareness of affordability assistance measures (Y/N) HH: 2020-21 Y-21%, 2021-22 Y-13%; Vulnerable 2020-21 Y-58%, 2021-22 Y-44%</p>	



PC-Helpfulness of additional services to vulnerable customers (Y/N) HH: 2020-21 Y-91%, 2021-22 Y-89%; Vulnerable: 2020-21 Y-95%, 2021-22 Y-84%

Customer education is key to reducing usage - 17 out of 20 would find it difficult/very difficult to reduce water usage to 50 litres a day	PR2
People have mixed views about metering – some were keen to manage usage, prevent waste and monitor costs; others were concerned about potential bill increases and a perceived lack of accuracy	PR2
Water efficiency activities such as home visits, innovative tariffs and targeted advice were considered too intrusive by some, while others felt this was important to help reduce demand for water supply.	PR3
Many people are unaware about how immediate and local the issue of water scarcity is and were shocked by the average daily use per person. Some customers acknowledged a frivolous use of water, especially given their region, but everyone recognised they are responsible for the amount of water they use, and therefore have a responsibility to reduce it. And some said they would take action to reduce their consumption	PR2
Be a leader in water efficiency by creating new solutions to it (e.g. developing new leakage detection technology); building partnerships across the community (housing associations, charities and community groups) for water savings; and creating community-led water-saving initiatives	PR1
Smart technology and data – some customers (empty nesters) felt it essential to help us become more efficient and provide a better service, while others (future customers and wealthy mid-lifers) felt it wasn't necessary Develop a customer app to monitor usage Some expectation of more innovative solutions to the problem	PR3 & PR2
Smart meters had mixed appeal – whilst many thought they were a positive (current meters inaccessible), few thought they impacted their behaviour. Some said they would not use smart meters over billing concerns, others were more open as it could increase awareness of water usage	
Affordability and fairness are in the middle importance category, these were also mentioned spontaneously in the research. Customer satisfaction was in the lowest importance category	CR2
Clear, concise and effective communications are paramount to engaging customers across a range of issues such as climate change and population growth impacts, water stress, carbon emissions and the environment. This is also the case for the universal metering programme	PR3 & PR2
More attention required for a broader and deeper education and information programme	PR3
Providing a seamless service was perceived to be an important but not customer facing priority - maintaining its current level of focus was perceived to be enough Dismay at lack of choice but previous interactions are overwhelmingly positive	PR3
HH NPS: 2020-21 +23; 2021-22 +27 Vulnerable NPS: 2020-21 +51; 2021-22 +45 HH sat: 2020-21 8.5; 2021-22 8.41 (out of 10) Vulnerable sat: 2020-21 8.86; 2021-22 8.83	BAU1
Reducing demand for water was seen to be a priority, Future bill payers felt SES Water should roll out smart meters over the next five years to support a more rapid reduction in water use. When provided with bill impacts, future bill payers chose to roll out smart meters over a 10-year period.	PR5



It was felt that SES Water should do more to help customers reduce their consumption; providing the opportunity to help customers reduce their bills was also felt to be important.

Smart metering was seen to raise awareness and help target information and support. The role of smart metering to help identify leaks was recognised and the opportunity to save energy was also identified; this was seen to be particularly important now due to the cost-of-living crisis.

Support for low-income families and those that need to use a lot of water was seen to be important.

Running education programmes in schools was seen to be important. Some felt that targeting older children, potentially those in sixth form, could have more impact as they could be more influential with their parents and, they would soon be paying their own water bill.

There was support for incentivising water efficient behaviour such as collecting rainwater and greywater and reusing it. There was also support shown for providing grants and funding for water-saving projects.

Ensure bills are affordable bills for all was the third highest ranked priority out of 11 key service areas. The priority of affordable bills drops as age increases with 80% of 18-34 years selecting it in their top five, compared with 68% of 35-64 years and 52% of 65+ years

Helping customers and businesses to reduce their water use was the lowest priority out of 11 key service areas

Smart metering was seen as the least important to invest in. And 41% said having a smart meter would not encourage water saving. 18-34-year-olds show higher levels of support for smart meters than older age groups

Of the five investment areas where there were clear choices for customers to influence the pace and level of investment, and prior to any bill impacts being shown, smart metering was seen as the least important to invest in, with just over two fifths (42%) rating it as important or very important to invest in

Customer views on smart metering are consistent with metering being their lowest priority and minimal support for any accelerated replacement of meters. Out of four possible investment options where people were shown the different bill impacts, almost four fifths (79%) support 'replace meters when required.'

Just over two fifths (41%) said that smart metering would not encourage water saving. When asked about what factors may drive customers' views, customers cite cost and affordability concerns, low priority for investment, concerns about smart meters, particularly amongst older customers, and wastage

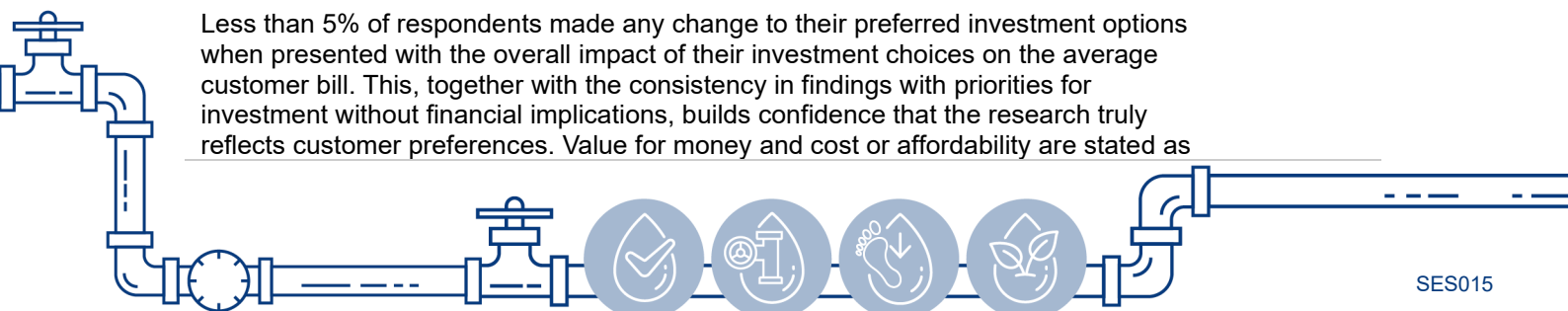
PR6

Focus group participants consistently link the different service areas together, often with affordability considerations. For example, an expectation that helping customers reduce their water usage would be a higher priority arises from participants linking being careful with water and keeping bills affordable. Unprompted, metering also triggers polarising views based on personal experience and situation, and the potential bill impacts.

Affordability is flagged by all groups as influencing customers' priorities. Customers primarily consider affordability in terms of the impact on them personally rather than the wider community of SES Water's customer base (qualitative playback)

Some participants feel that a customer's priorities are likely influenced by personal experience of service delivery. Others consider that the individual's life stage may be a factor, particularly with respect to improving the environment and affordability

Less than 5% of respondents made any change to their preferred investment options when presented with the overall impact of their investment choices on the average customer bill. This, together with the consistency in findings with priorities for investment without financial implications, builds confidence that the research truly reflects customer preferences. Value for money and cost or affordability are stated as



the main reason for selecting their chosen plan by 55% of customers. 21% highlighted the environment as a priority for their plan.

59% of customers state they pay most attention to the scenario description rather than the bill impact when selecting their preferred investment option. Those paying most attention to the bill impact (41% overall) decreased with age, with 54% of age 18-34 years selecting on bill impact compared to only 31% of 65+ years

When considering bill impacts, 51% of customers pay most attention to the total bill impact over 25 years, with 39% focussing on the bill increase in 2030. The focus changes with age - the younger age group pay more attention to the bill impact over 25 years, with 65+ years concentrating on impact in the first 5 years (bill impact in 2030). Focus groups participants endorsed the survey finding that 69% of respondents agreed that water bill increases are acceptable if financial assistance is available to protect those who need it.

Most participants shared that during the sessions they largely consider affordability in terms of their own personal circumstances rather than the wider community, or SES Water's customer base. Some customers do consider affordability in terms of both themselves and others, but a minority primarily consider everyone,

Focus group participants are not surprised that customers aged 18-35 years tend to focus more on the bill impacts of investment options rather than the scenario outcomes. They feel this is driven by the current cost of living crisis having a greater impact on younger people.

One third of customers (36%) would be willing to contribute (WtC) at least an additional 50p per month towards an additional cross-subsidy for social tariffs each year from 2025-30, and 45% would be willing to contribute 25p extra a month. The mean WtC is 38p extra per month. However, customers do express concerns around the cost of living and bill affordability both now and in the future.

The median WtC amount is 10p a month, meaning a majority (50.1%) are willing to contribute up to that amount.

There are some significant differences in WtC across different sample sub-groups. While there are no significant differences by age, the older (75+) and younger age groups (18-44) are more likely to be willing to contribute. Men are significantly more likely to be willing to contribute compared to women and ABs are significantly more likely to be willing to contribute compared to C1C2s.

Just over two-thirds of customers feel confident they will be able to afford their water bills over the next 12 months. This is broadly in-line with perceived affordability of mobile phone, council tax and internet/broadband. As might be expected, gas and electric bills are where customers are least confident, they will be able to afford their bills – with one quarter (26%) not being confident they will be able to afford. Mortgages aren't applicable to three-fifths of customers participating (62%).

PR7

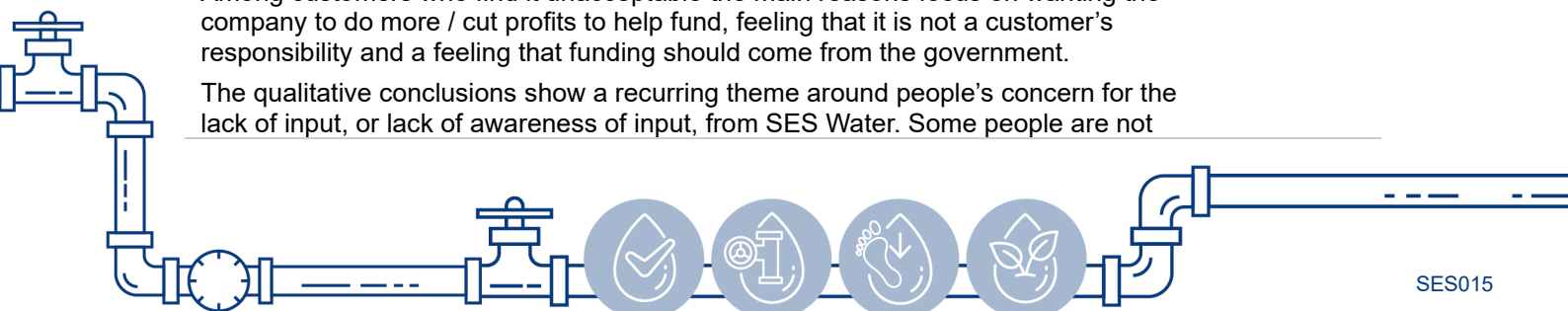
Over two-thirds say they have heard of Priority Services. In addition, around one in ten (9%) say they are not aware but would like to know more.

Less than half (47%) are aware of financial support for customers who are struggling to pay, with one in seven either previously having support or currently receiving support (15%).

Over two fifths (44%) disagree with the principle of contributing to support customers who are struggling to pay, with three in ten (29%) agreeing. After being informed of plans for increasing the support on offer to customers from 2025-2030, 42% find the changes unacceptable, and 34% acceptable.

Among customers who find it unacceptable the main reasons focus on wanting the company to do more / cut profits to help fund, feeling that it is not a customer's responsibility and a feeling that funding should come from the government.

The qualitative conclusions show a recurring theme around people's concern for the lack of input, or lack of awareness of input, from SES Water. Some people are not





happy about paying for the subsidies whilst SES seemingly are making a lot of profit and are able to pay shareholders a lot of money.

Customers want to see more from SES. Suggestions include matching customers' contributions and increasing awareness around how SES supports its customers. In addition, they want to have more information about the tariffs – there needs to be clear communication about how much is being taken for the social tariff, and exactly how the money is split and shared to help others.

There is broad agreement that the amount being taken currently to help towards the tariff is very manageable and they would be able to pay more, however, they are not happy about paying any more until they feel SES Water is matching their contribution – much more evidence needs to be made public as to how SES are helping and why they also need their customers help

The qualitative findings from the AAT research showed that:

- Some people queried whether smart meters would actually work. This is consistent with other research that has been undertaken on metering. Based on people's experiences of energy smart meters, participants felt this was a wider issue than just something for water suppliers to tackle. They also suggested behavioural change was needed
- Clear communications around the benefits of smart meters are required both for customers themselves and for wider society. Again, this is a consistent theme and is something we are committed to doing as our programme of smart metering unfolds.

Non-households were less keen on smart meters and questioned whether they would make a difference.

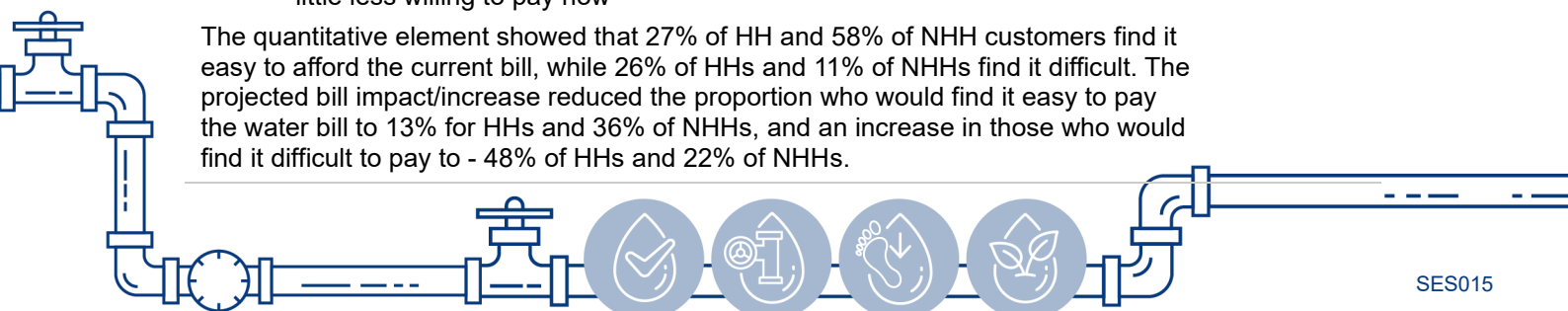
Linked to water efficiency, businesses with higher usage were particularly concerned about the potential for water shortages in the future

More generally, the qualitative part of the ATT research reported that:

- General awareness of SES was good, most knew who they are but few had detailed knowledge about their role and that they only did clean, drinking water
- Most were happy with service, mostly gave 4/5 with some fives. The few that had experienced issues were happy with how it had been resolved.
- Some had experience with other water suppliers but were pleased with SES in comparison
- Customers were pleased to see SES performing well in key areas, which made customers believe they were getting both good value and a good service
- Customers were broadly they were happy with the 2050 ambitions, though hadn't given it much thought prior to the discussion
- Everyone was affected in some way by the cost-of-living crisis, but this didn't really get down to their ability to pay their water bill, given its size in comparison to other bills
- Generally, customers were happy with the must-do and could-do elements of the plan, and suggested SES should go ahead and make the investments.
- Some did question whether these were one-off investments, or if would they be repeated in future AMP periods? If they were to be repeated, they were a little less willing to pay now

PR8

The quantitative element showed that 27% of HH and 58% of NHH customers find it easy to afford the current bill, while 26% of HHs and 11% of NHHs find it difficult. The projected bill impact/increase reduced the proportion who would find it easy to pay the water bill to 13% for HHs and 36% of NHHs, and an increase in those who would find it difficult to pay to - 48% of HHs and 22% of NHHs.



In terms of Business Plan acceptability, 66% of households and 79% of NHHs surveyed said the plan was acceptable, with just 11% of HHs and 5% finding it unacceptable. The main reasons for finding the proposed plan acceptable were that customers support what SES Water is trying to do in the long term. (HHs 52% and NHHs 30%). In addition, 45% of HHs and 23% of NHHs felt the plan seemed to focus on the right services. The other main reason is that 28% of NHHs, and 17% of HHs, said they think SES Water provides a good service.

The key reasons given by HHs for why the proposed plan was unacceptable, were thinking companies should pay for service improvements themselves (37%) and thinking company profits are too high (28%). 28% also suggested they felt the proposed bill increases were too expensive and 23% said they wouldn't be able to afford this. 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.

The AAT research showed the importance rank order for each of the proposed business plan elements relating to 'helping you reduce your water footprint and charge a fair price'.

- Extra water efficiency support for customers. HH +£0.69; NHH +0.35% = 62% & 52% respectively
- Providing smart meters to 192,000 homes and businesses with a customer friendly way of monitoring their water use, HH +£7.94; +3.99% = 20% & 39% respectively
- Don't know / can't say = HHs 18%, 9% NHHs

When asked how they like to see bills increase over time, 40% of HHs, and 46% of NHHs, felt an increase in bills starting sooner would be preferable to starting later, (13% HHs, 30% NHHs) suggesting that spreading the increases over time would be a better approach. However, 47% of HHs and 24% of NHHs 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.

Other findings from the AAT survey reported that:

Only 3% of customers struggling financially found their current bill easy to afford, which reduced to 1% for the proposed bill for 2025-30

Along with customers struggling financially, those on incomes less than £26,000, and with a medical vulnerability, also felt proposed bills would be more difficult to pay

Acceptability with the proposed plan reduced to 55% among HHs who are struggling financially and 59% among those with a medical vulnerability

Fewer HHs who were struggling financially felt that increases should start sooner than overall; however, 62% of this group felt they didn't know enough to give an answer

Overall satisfaction with SES Water amongst household customers was 6.62 out of 10. Satisfaction with value for money scored a mean rating of 6.27 out of 10.

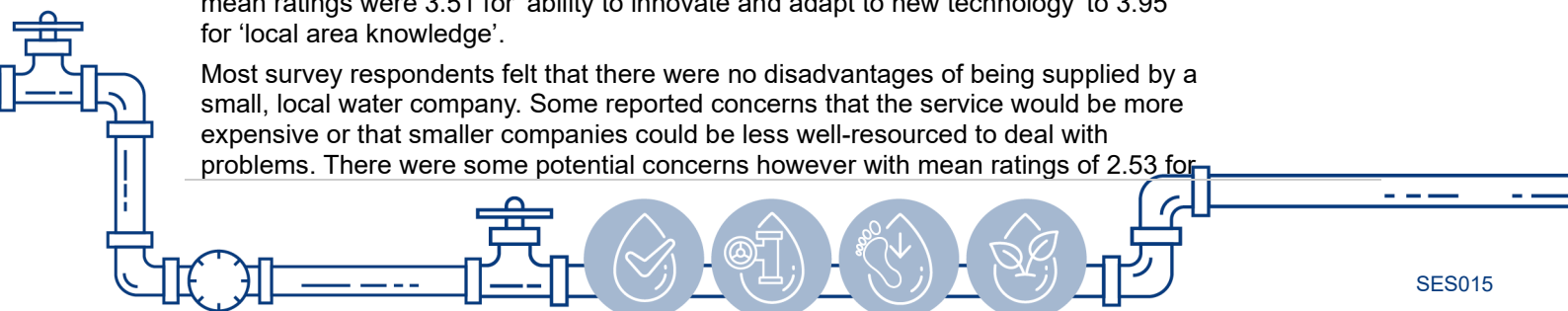
72% of survey participants were unaware that SES Water was one of the smallest water only companies.

Customers viewed the comparative performance of SES Water favourably, with a mean score of 3.7 out of five on a scale of 1 (very poor) to 5 (very good).

In the focus groups, the key advantages of being a small, local water company were quicker response times, a more personal service and local knowledge. In the survey mean ratings were 3.51 for 'ability to innovate and adapt to new technology' to 3.95 for 'local area knowledge'.

Most survey respondents felt that there were no disadvantages of being supplied by a small, local water company. Some reported concerns that the service would be more expensive or that smaller companies could be less well-resourced to deal with problems. There were some potential concerns however with mean ratings of 2.53 for

PR9



'lack of expertise' and 3.45 for the likelihood of being 'taken over by another company'.

Overall, survey participants were positive about being supplied by a small, local water company was providing a mean score of 4.03 out of 5.

When a small company premium was introduced, the majority of respondents (62%) said they would not be prepared to pay a small charge on top of their bill to enable them to be served by a small, local water company

Of those who were willing to pay something, over half (51%) stated they would be prepared to pay £2.51 to £3 on top of their yearly bill. Reasons for this included that people felt this was a small amount of money, that they wished to support a local business and, it reflected a sense satisfaction with the service provided by SES Water

An average of 3.85 out of five was achieved when asked how acceptable respondents found the SCP as a concept with 43% stating that it was either somewhat or completely unacceptable.

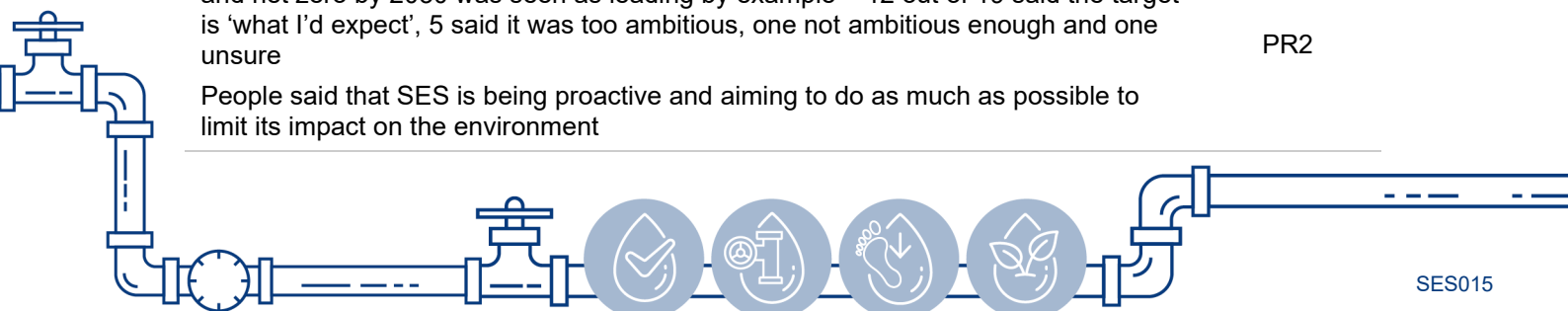
Acceptability of the SCP was underpinned by a desire to improve or maintain the service, to support smaller companies. Conversely, unacceptability of the SCP was founded in a sense that respondents already pay enough and don't want to pay more during a cost-of-living crisis. Respondents also argued that the SCP is not appropriate when customers have no choice in supplier, and they reported concern around profits paid by shareholders

Overall, this research has revealed a mixed level of customer support regarding £2 extra for the SCP for the PR24 bill period. More (47%) are supportive than find it unacceptable (34%), however no strong consensus was achieved, almost a fifth (19%) saying that it was neither acceptable or unacceptable, or that they needed more information.

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

**Table 6: Insight synthesis - Enhance the environment and have a positive impact on the local area**

Insight since PR19 to inform PR24	Source
<p>Our sources of water should be sustainable – sharing supplies with other companies and developing technology, such as rainwater harvesting make sense</p> <p>Keeping our natural water supplies free from pollutants is vital</p> <p>Increasing biodiversity across all our sites by developing havens to increase the amount and variety of wildlife is very important to customers</p> <p>Achieving net zero by 2030 is mostly seen as a <b>stretch</b> ambition, although some wanted SES to go further</p> <p>People felt that protecting the environment is expected, whereas improving it means SES is going above and beyond</p> <p>The enormity of the task often leaves people feeling quite removed, but more focus on the local environment could elevate its importance and relevance</p>	PR3
<p>Customers were impressed with SES's current efforts to reduce CO2 emissions, and net zero by 2030 was seen as leading by example – 12 out of 19 said the target is 'what I'd expect', 5 said it was too ambitious, one not ambitious enough and one unsure</p> <p>People said that SES is being proactive and aiming to do as much as possible to limit its impact on the environment</p>	PR2



20 out of 21 agreed/strongly agreed that SES should use demand led approaches to reduce water usage before abstracting more from rivers

11 out of 19 felt improving SES's water efficiency (not wasting it having gone through an energy / chemical intensive process) should be prioritised as the best way of achieving net zero; 2 prioritised energy efficiency and electric vehicles and one said use less fossil fuels. No-one prioritised renewables, but 3 said all 5 five issues were equally as important because for more CO2 reductions overall

18 out of 19 said SES was being ambitious enough in its net zero route map, 1 was unsure

Overall, and from a qualitative perspective, people seem unwilling to pay more to reach net zero sooner; where there was a willingness to contribute more, customers wanted the money to be ringfenced

Connecting saving water to the preservation of nature by helping people understand the relationship between water efficiency and the preservation of nature e.g. leveraging our natural sites as an educational site

Delivering a leading business plan means covering the breadth of sustainability concerns (e.g. carbon, water scarcity, electric vehicles); and prioritising the natural environment e.g. elevating biodiversity benchmarking is going to have impact

PR1

Innovating for nature by finding new ways of being a more sustainable company e.g. aquaponics, freshwater harvesting

In terms of water resource management, protecting the environment is key. The long-term plan to secure water supplies and improve resilience of the water system to drought and unexpected events should not at the expense of the environment; and

CR1

Supply options that have a net positive environmental impact and deliver wider public value (e.g. recreation and amenity) will be preferred. Use of chemicals, high energy use, and other unmitigated impacts are key reasons why some options are less favoured.

Making more of our land more accessible was a practical initiative in terms contributing to the wider community. It would make better use of our sites while providing wider health and wellbeing benefits to our local communities

PR3

In addition, developing sources of renewable energy on the land we own made sense and was received positively

There was a positive response to SES's community, educational and environmental involvement, exceeding expectations as a water supplier – all seen as going the extra mile, but there is a lack of awareness

PR2

Delivering a leading business plan means covering the breadth of sustainability concerns (e.g. carbon, water scarcity, electric vehicles); and prioritising the natural environment e.g. elevating biodiversity benchmarking is going to have impact

Inspiring sustainable behaviours in our communities by offering sustainable business grants, setting up electric vehicle charging points, helping access to renewable energy

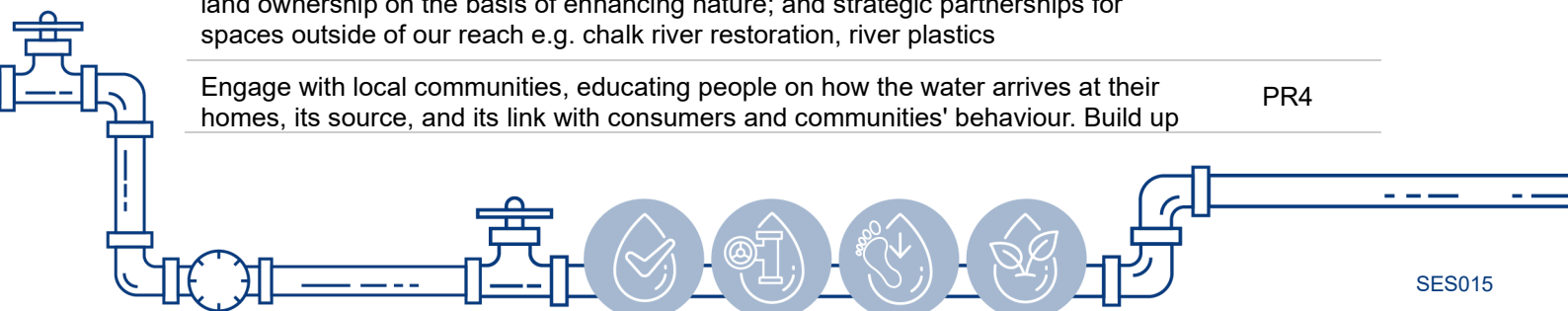
PR1

Opening up existing natural spaces for more people to enjoy by finding new ways for the public to make use of our land e.g. community gardens, wellness walks, beekeeping etc; and targeting hard-to-reach customers and vulnerable groups to use our spaces in a way that adds value to their lives

Preserving more natural spaces and helping others do the same by assessing our land ownership on the basis of enhancing nature; and strategic partnerships for spaces outside of our reach e.g. chalk river restoration, river plastics

Engage with local communities, educating people on how the water arrives at their homes, its source, and its link with consumers and communities' behaviour. Build up

PR4



partnerships with local communities, NGOs, and local authorities will also contribute to this  
 developing partnerships with relevant stakeholders is crucial for a positive long-term impact

Having a positive impact on the local community was seen as good practice, rather than a customer facing priority PR3

I am knowledgeable in what we all need to do to reduce carbon emissions and achieve net zero (1 S disagree, 5 S agree) 2021-22 4.12 BAU1  
 I am concerned about climate change (1 S disagree, 5 S agree) 2021-22 4.31

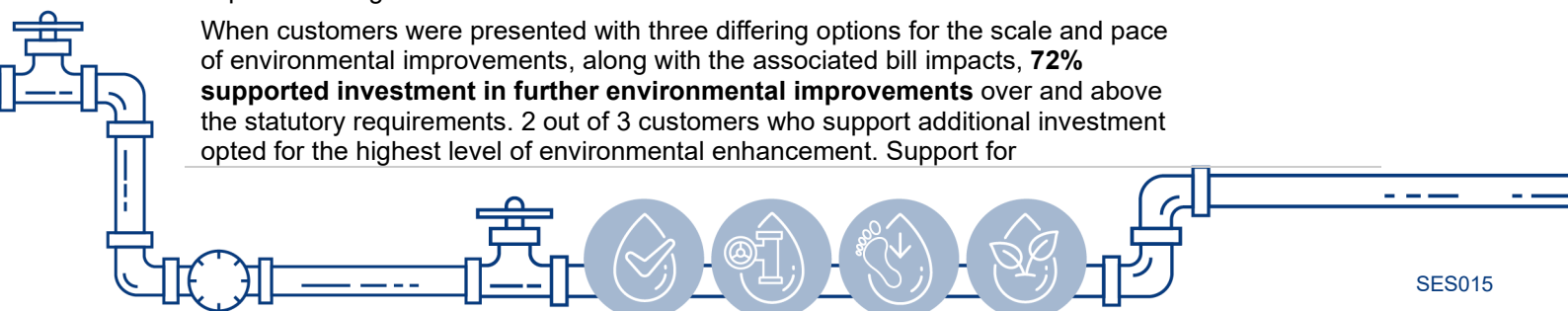
Pollution and biodiversity were in the middle importance category for customers, carbon was in the lowest importance category. People were more interested in, and found it easier to relate to, the specific impact of company activity and how this is measured rather than wider measures such as biodiversity or carbon CR2

Future customers in workshop 1 felt that SES Water had already taken positive steps to reduce its carbon emissions and that others could have a greater impact than they could, so other things such as leakage and reducing demand – both of which will help lower carbon emissions – should be the focus over the short-term, but where they can, SES Water should take steps to continue to lower their emissions. PR5  
 When provided with bill impacts, future customers were supportive of SES Water reducing carbon emissions more quickly than the 2050 Government target. considered it important that the company reduces its overall impact on the environment. It was felt that it would demonstrate leadership and provide more opportunity to collaborate with other businesses and communities. There was recognition that SES’s small size means it would have limited impact overall.

Future customers’ views on enhancing the environment were mixed. Most were supportive of SES Water going further than its legal requirements to improve biodiversity, river water quality and deliver wider benefits. Groups that were presented with bill impacts supported going further. Group one chose to carry our environmental enhancement schemes across the two main rivers and chalk streams relied upon by SES Water. The felt this was important to keep the water sources healthy and reduce treatment processes and costs in the long-term. Group two chose to focus just on the two main rivers and make improvements to water quality. Others felt that the other activities the company was prioritising in the short-term would help deliver long-term environmental improvements, and as such, didn’t express an expectation that the company should go further at present. PR5

Improve the environment and have a positive impact on our local area was the 6<sup>th</sup> most important service area out of 11. PR6  
 Of the five investment areas where there were clear choices for customers to influence the pace and level of investment, and prior to any bill impacts being shown, environmental improvements and carbon net zero were reported as the second and fourth most important areas to invest in. The priority of **improving the environment** also drops as age increases with 51% of 18-34 years selecting it in their top five (3<sup>rd</sup> priority), compared with 46% of 35-64 years (6<sup>th</sup>) and only 32% of 65+ years (8<sup>th</sup>), though the variance is less  
 Although 71% rated environmental improvements as important or very important, 5% less than lead, it was ranked second as a higher proportion gave it a very important rating.

When customers were presented with three differing options for the scale and pace of environmental improvements, along with the associated bill impacts, **72% supported investment in further environmental improvements** over and above the statutory requirements. 2 out of 3 customers who support additional investment opted for the highest level of environmental enhancement. Support for



environmental improvements is consistent across location and SEG but varies a little by age with 36% of 18-34 years selecting the second option and 42% the third.

Almost half, 46%, were aware of the link between water abstraction and chalk streams i.e. that continuing to abstract water from these streams could have a lasting environmental impact. Awareness increases significantly with age, rising to 62% for the over 65 years.

In terms of carbon net zero, and out of four options that were presented, customers support reaching net zero by 2050, not earlier. There is clear backing for an approach that follows a steady reduction. Support for the fourth option, which accelerates operational carbon reductions, is stronger amongst ABC1 than C2DE.

Almost two thirds, 64%, said carbon net zero was important, or very important to invest in

Approaching nine in ten, 86%, were aware of the government target for net zero by 2050

The AAT research showed the importance rank order for each of the proposed business plan elements relating to 'improving the environment and having a positive impact on the local area'

Work to enhance biodiversity on 70% of the land SES owns through improving land management, HH +£0.12; NHH + 0.06% = 46% and 48% respectively

Enhancing the environment, increasing resilience and biodiversity on the river Eden, HH +£0.11; NHH +0.04% = 29% & 42% respectively

PR8

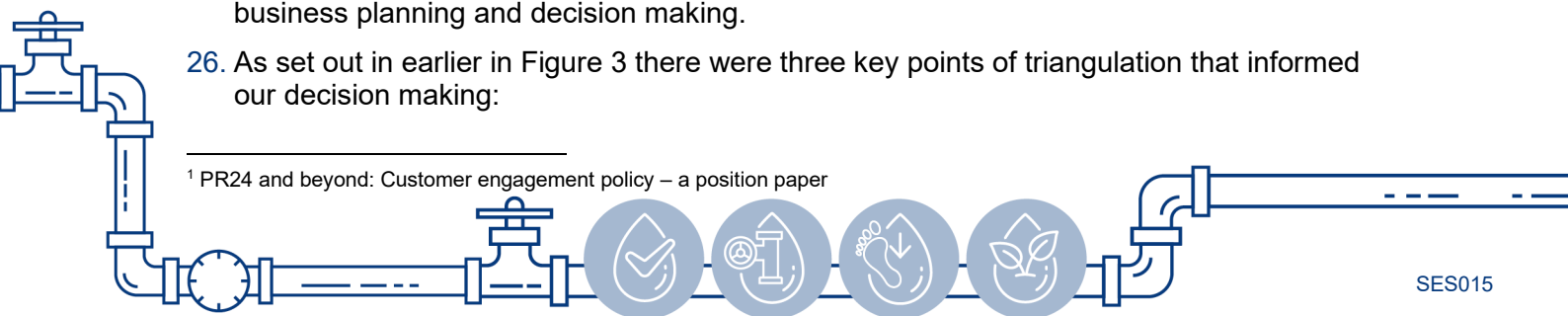
Don't know / can't say = HHs 26% And 10 NHHs

In terms of enhancing the environment, participants in the AAT groups thought the improvements were such a small investment. That SES Water should just get on with doing things, rather than just talking about it.

### C. Triangulating the insight and decision making

- 23. We have triangulated the findings of the insight at three key points in the plan. At each point we have used our analysis to inform our decision making about next steps.
- 24. Our starting point for the triangulation process was the eight principles of high-quality customer engagement set out by Ofwat<sup>1</sup>. We then looked at the six elements of good practice triangulation that Sia Partners carried out for CCWater and further examples shared at industry workshops. We developed four criteria detailed in section A, based on this review to ensure we captured the key elements identified. We developed a scoring system from 1 to 5 to ensure we could fully assess each piece of research at a granular level against the criteria with a wide enough range to ensure we reflected an accurate assessment of its quality.
- 25. All customer engagement undertaken was scored against this approach. This framework enabled us to undertake a strategic approach to collecting and triangulating customer evidence. It also enabled us to develop a very deliberate, phased and iterative approach. After each stage of engagement, the insight was collated and synthesised into our four - overarching priority areas, with an independent assurance process in place, this meant that we were able to develop the golden thread where customer insight informed our business planning and decision making.
- 26. As set out in earlier in Figure 3 there were three key points of triangulation that informed our decision making:

<sup>1</sup> PR24 and beyond: Customer engagement policy – a position paper



**Triangulation point 1** – at the end of phase 1 where we triangulated the findings of Ofwat’s collaborative research on customer priorities with our own research findings, including our bespoke one research.

**Decision point 1** - this informed our decision about whether we put forward any bespoke performance commitments and identified areas for further testing where there were genuine choices for customers.

**Triangulation point 2** – at the end of phase 2 we validated our earlier triangulation on customer priorities, and we triangulated the findings of our bespoke 2 research against our other research sources.

**Decision point 2** - these informed decisions about long- and short-term performance levels in our LTDS and identified the areas where there was support for additional expenditure at PR24.

**Triangulation point 3** – we triangulated the findings of affordability and acceptability testing of our preferred plan and considered additional research into our social tariff and small company premium.

**Decision point 3** – this informed our PR24 plan and associated bill impacts.

## Triangulation point 1

### Customer priorities

27. The first phase of this triangulation was to consider whether the findings of Ofwat’s collaborative research aligned with our own customers’ priorities and whether there were any gaps that would justify us putting forward a bespoke performance commitment.
28. The outcomes of triangulating the first phase of our qualitative customer priority research showed strong similarities with the Ofwat/CCWater collaborative priorities research (also qualitative). There was considerable alignment in terms of water aesthetics and interruptions to the water supply being the most important issues to customers. However, moving forward in the process it became clear that customers recognise our strong performance and don’t currently prioritise us reducing interruptions further. As we are currently in the upper quartile of industry, we propose to continue reducing supply interruptions to achieve zero by 2050. This was validated in our bespoke 2 research which we provide further comment on in paragraph xx
29. Similarly, other aspects that we tested such as biodiversity, resilience, carbon, affordability and fair bills for all, customer satisfaction and a seamless service, were all comparable to the Ofwat research in terms priority ranking, as was per capita consumption.
30. The one slight difference in priorities between the two pieces of research was leakage. In the Ofwat research it was ‘medium’ importance, but in our research, it is considered ‘high’ importance.
31. Given the alignment of priorities between SES Water and Ofwat, we felt there was no need to test any further attributes for putting forward as possible bespoke performance commitments. As Table 7 below shows, the attributes we tested, and which were deemed as priorities, all fall within the common performance commitment (CPC) framework.
32. The one bespoke performance commitment that we did put forward covers our statutory requirement to soften water at several our sites. This is a continuation of an existing bespoke performance commitment introduced at PR19 and delivers against our unique legal requirement to soften water in parts of our supply area.



### Identification of areas for further research

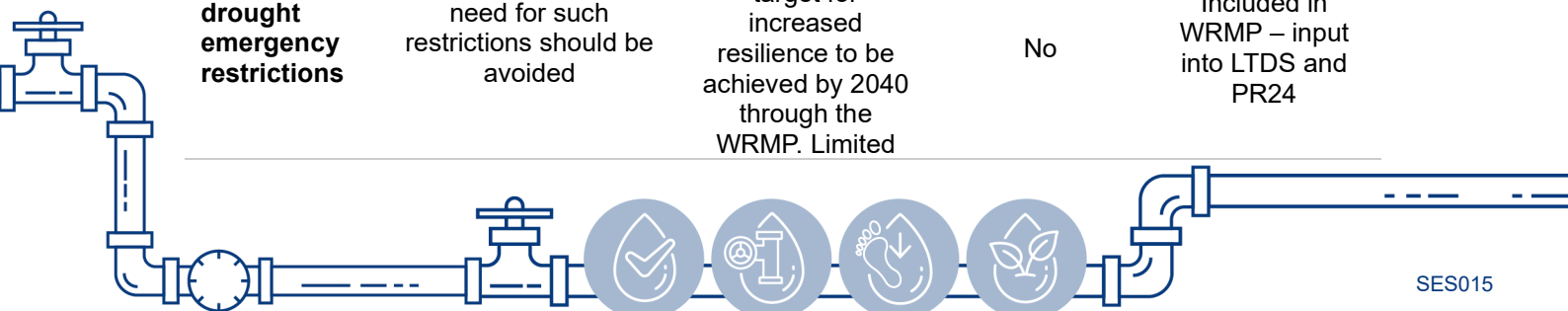
33. The second phase was to identify the areas where there were genuine choices for customers. We analysed all the main performance areas and using three criteria, filtered where there were genuine choices for customers to inform the level of our long-term ambition and the pace at which we delivered performance improvements beyond our statutory duties. The three criteria were:

- (a) Are there conflicting customers views?
- (b) Is there potential to improve performance beyond legal and regulatory requirements?
- (c) Are there choices relating to the timing and pace of service enhancements?

34. The following table sets out how we assessed each service area against the criteria to establish if there was value in us exploring further with customers, and if so, how this would be carried out.

**Table 7: Assessment of service areas for further research**

Service area	Conflicting customer views	Performance enhancement beyond statutory requirements	Options for delivering enhanced performance	Next steps
<b>Drinking water quality compliance</b>	No – top quality water is consistently customers’ highest priority	No – company is targeting full compliance  Drinking water protection schemes included in WINEP	No	Common Performance Commitment
<b>Taste, smell and appearance</b>	No – top quality water is consistently customers highest priority	No statutory requirements. SES currently in upper quartile	No – SES Water is high performer and there are not options to deliver further enhanced performance in the short term	Common Performance Commitment
<b>Affordability</b>	Concern about the cost of living was high on some people’s agenda and some found it hard to consider water bill rises alongside other bill rises	Yes – company must provide a social tariff but opportunities to extend the scheme further	Yes – options associated with level of cross subsidy and number of customers supported	Bespoke 3-social tariff research
<b>Severe drought emergency restrictions</b>	No – avoiding the need for such restrictions should be avoided	No – Government target for increased resilience to be achieved by 2040 through the WRMP. Limited	No	Included in WRMP – input into LTDS and PR24



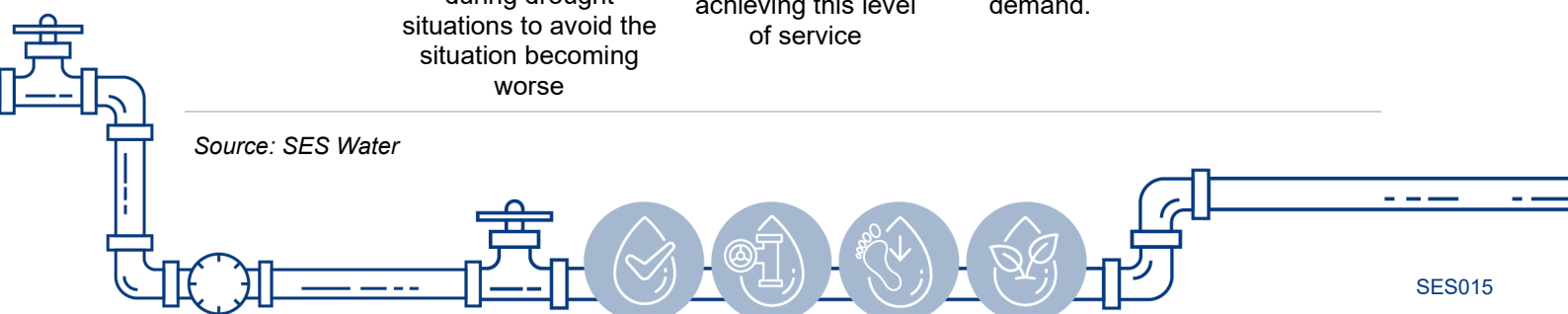


			scope to achieve this more quickly	
<b>Leakage</b>	No – high priority for customers and evidence that they want SES to do more	Yes – statutory target to achieve 50% leakage reduction by 2050 but potential for the company to go further	Yes – a range of options for the speed at which leakage reductions are delivered and the long-term target.	CPC Bespoke 2 AAT
<b>Water Supply interruptions</b>	Yes – interruptions to supply is a high priority for customers. Evidence our customers recognise our strong performance and don't currently prioritise us reducing interruptions further.	No statutory requirements. SES currently in upper quartile and propose to continue reducing supply interruptions to achieve zero by 2050.	No - limited options to how quickly we can achieve it	CPC
<b>Resilience</b>	No - Customers expect our service to be resilient and we should plan for future challenges although understanding of resiliencies limited	No statutory requirements. Typically results in impacts on service in other areas such as supply interruptions, restrictions, burst mains.	Yes – specific schemes that will improve resilience identified in preferred plan	AAT
<b>Pollution</b>	No – customers expect us to protect the environment and pollution is unacceptable	No. Our target is zero pollutions	No	CPC
<b>Environment (river health)</b>	Yes – some customers highly supportive of us delivering environmental enhancements while others see it as less important	Yes – there is scope for us to propose non-statutory environmental schemes	Yes – different scheme options	Bespoke 2 AAT
<b>Environment (biodiversity)</b>	Yes – some customers highly supportive of us delivering environmental enhancements while others see it as less important	No statutory requirements but scope for us deliver biodiversity enhancements	Yes – different scheme options	CPC Bespoke 2 AAT
<b>Lead</b>	Yes – concern about old pipes that are made of lead and health impacts but recognition that the	Yes – we currently go beyond our statutory requirements, and we could go further	Yes – range of options for the replacement of lead pipes	Bespoke 2 AAT PCD



	issue is currently managed. Some feel lead pipes should be replaced but concerns about cost	and proactively replace more lead pipes		
<b>Water pressure</b>	Yes – some localised concerns about water pressure	No statutory requirements. Typically impacts certain parts of our region.	No. We will address the pressure issues experienced by our most poorly served customers (TBC)	NA
<b>Carbon</b>	Yes – some customers feel we should aim to achieve net zero carbon emissions as quickly as possible; others feel it is not an urgent priority	Yes, government target to achieve net zero carbon emissions by 2050, potential to achieve the target sooner.	Yes – range of options for achieving net zero	CPC Bespoke 2
<b>Customer service</b>		No statutory requirements. Customer satisfaction measured by C-MeX currently a lower performing company	Addressed through retail plan and customer strategy	CPC
<b>Softening</b>	Limited insight on softening	SES Water is the only company in the industry required by law to soften water in certain areas	No – continue to soften to the level required	Bespoke PC
<b>Using less water</b>	Yes – some customers recognise the importance of reducing their water use and are supportive of smart meters, others are not	Statutory target is to achieve PCC of 110 l/p/p by 2050, limited scope to go beyond this but choices around the pace of smart meter roll out	Yes – range of options for the roll out of smart meters	CPC Bespoke 2 AAT
<b>Temporary use bans (TuBs)</b>	Most evidence suggests customers accept that restrictions on water use are needed temporarily to help reduce demand during drought situations to avoid the situation becoming worse	Service levels for the use of TuBs are set in the company drought plan (1 in 10 year). The company is achieving this level of service	No. TuBs are included in the WRMP as an option to reduce demand.	N/A

Source: SES Water



## Decision point 1

35. This process led to us identifying five areas where there were meaningful choices for customers to explore further in the next phase of our research, they were:

- Leakage
- Environmental enhancement
- Lead replacement
- Carbon
- Smart metering

36. Options for each of these service areas were presented in our bespoke 2 research both with and without bill impacts. We also retested customer priorities for our service to validate the findings of our first stage of triangulation.

## Triangulation point 2

### Validation of priorities

37. In this section, we discuss the triangulation of the five key priorities that were tested with customers as part of the long-term outcomes and priorities research and validate each in the context of previous triangulation on each of the areas. As mentioned earlier, preventing interruptions to supply was a top priority in the collaborative research, and although it is clear this aligns with our own research, our customers did recognise our strong performance and appeared to place making further improvements as a lower priority.

38. To validate our conclusion, we tested it quantitatively in our bespoke 2 research. People were asked to rank their top five areas, out of 11, of what they believe are the most important, or top priority for us to consider. The table below shows that preventing interruptions to supply is a lower priority for our customers compared to other service areas. Furthermore, the research showed that just 1 in 17 customers (6%), had contacted us in the last five years about an unexpected interruption to supply.

39. With a few variances, customer priorities align providing confidence that the focus group discussions identifying the factors driving priorities are likely to reflect the wider customer base. The exception is interruptions to supply which showed little variability in the survey findings but was prioritised higher by the focus group participants. Discussions indicated a higher proportion of focus group customers had experienced supply interruptions or low pressure than reported by the survey respondents.



## 4: Customer prioritisation of service areas

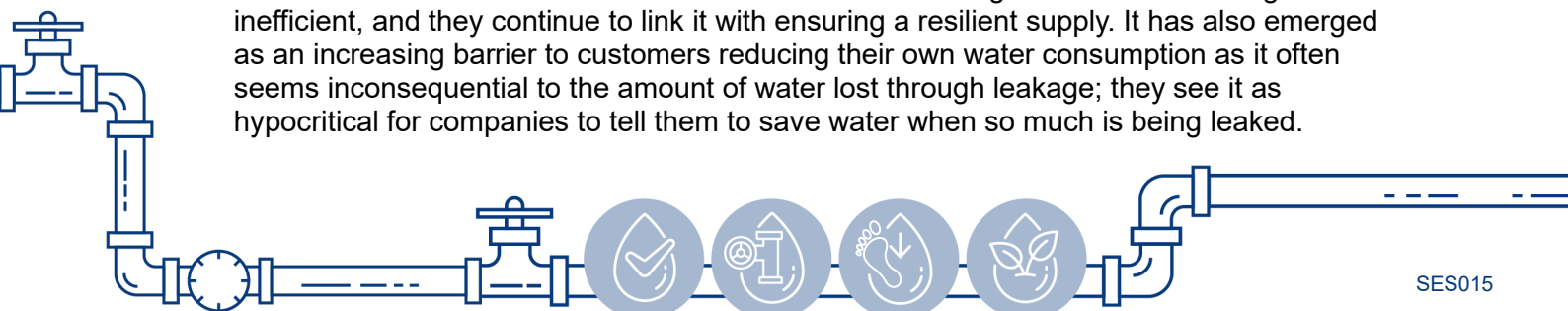
1. High quality water that looks, tastes and smells good
2. Reduce the amount of water that is lost through leakage
3. Ensure bills are affordable bills for all
4. Ensure there is enough water to reduce the risk of any restrictions on water use during a drought
5. Maintain existing infrastructure for current and future customers and prevent bursts
6. Improve the environment and have a positive impact on our local area
7. Ensure properties consistently receive good water pressure
8. Prevent interruptions to water supply
9. Continue to provide a high quality service to all our customers
10. Continue to soften the water supply to 80% of our customers
11. Help customers and businesses to reduce their water use

Source: *Bespoke 2 research (ICS consulting)*

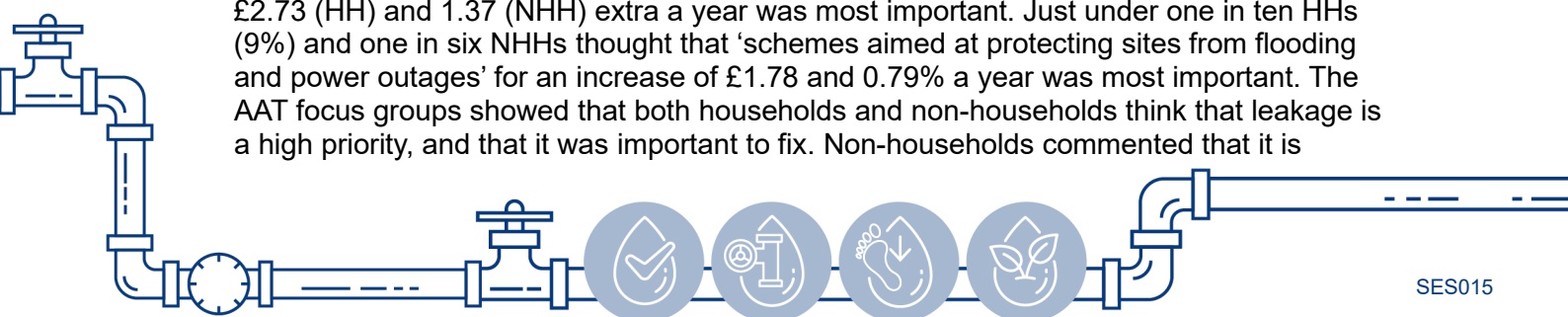
40. Therefore, we set our long-term ambition to eliminate supply interruptions that last longer than three hours, with our focus over the 2025 to 2030 period on improving our response to such events to make further, modest improvements in performance. This will ensure we remain in the upper industry quartile but reflect our customers priorities and focus additional investment on other areas to help keep bills affordable.

### Leakage detailed triangulation

41. Our bespoke 2 research into leakage confirmed it as a priority for customers. When ranked against the other areas of service, it positioned second, behind high quality water. This was consistent with our previous findings and reinforces the importance of addressing it in our PR24 plan and beyond.
42. At PR19 it was a priority for our customers, and they showed a willingness to pay more, which was reflected in enhancement funding for this area. It was also seen as an important factor in making the water system more resilient.
43. Since PR19, we have conducted several research studies which have involved understanding if leakage is still a priority for customers, and to what extent further investment is required. Whenever leakage has been discussed with customers as part of PR24 customer engagement, both industry research or our own, it has always emerged as an important customer priority and many customers have indicated that it should be addressed with greater urgency.
44. Research into the WRSE regional plan reinforced that customers expect to see leakage reduction as part of a balanced future plan. Indeed, like our own research, reducing leaks, along with removing constraints in the water supply network, was the starting point in ensuring an efficient water system.
45. Although we are in the upper quartile of industry performance on leakage, and customers have been shown how our performance compares with others, our own company research for PR24 has indicated that customers view leakage as waste and being inefficient, and they continue to link it with ensuring a resilient supply. It has also emerged as an increasing barrier to customers reducing their own water consumption as it often seems inconsequential to the amount of water lost through leakage; they see it as hypocritical for companies to tell them to save water when so much is being leaked.



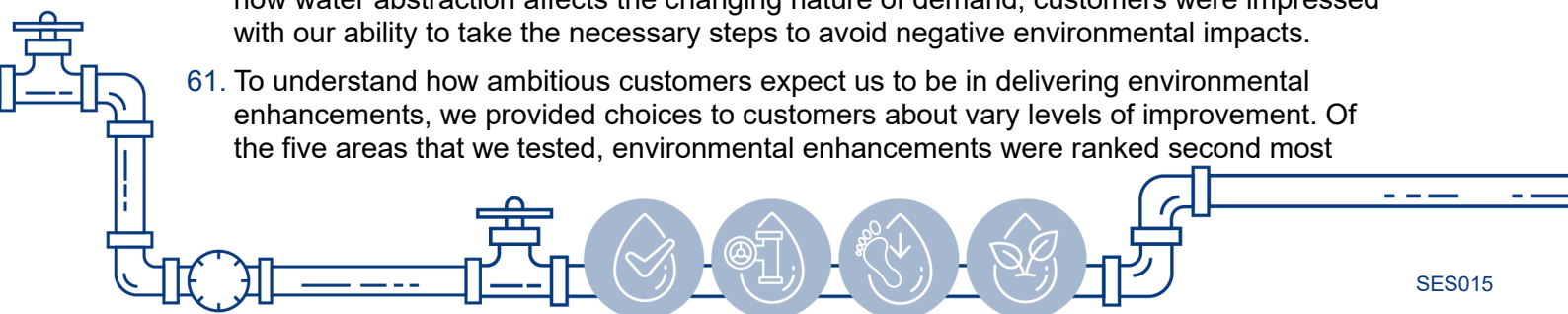
46. In terms of ambition around leakage reduction, some responses to our long-term delivery strategy (LTDS) show that we were not necessarily being ambitious enough, and people expected us to go further. This was also the case in the early priorities research we carried out. At our 'Your Water Your Say' open challenge session it was also a key area raised by customers.
47. To understand how ambitious customers expect us to be in reducing leakage, in our bespoke 2 research we provided choices around that pace at which we could address leakage and the level of leakage reduction we could achieve. This found that of the five investment areas we tested, leakage was ranked as the most important areas to invest in. Nearly all customers (91%) feel that investment in leakage reduction over the next 25 years is important, prior to knowing the potential bill impacts. The strength of support for investment increases with age. 53% do not consider that meeting the government target to halve leakage by 2050 is acceptable.
48. When presented with bill impacts of different investment choices, 25% of customers chose to achieve the Government's leakage target. 75% of customers chose an option that would deliver additional investment and exceed the Government target – 40% opting to reduce leakage quicker to halve it by 2040 and 35% opting to go further and reduce leakage by 60% by 2050. There were some differences with age, with support for a higher level of reduction increasing with age.
49. When we explored leakage in more detail at our future customer sessions, they also identified it as a high priority. They felt that companies should aim to go further than the 50% target reduction by 2050 or achieve it earlier. They supported the company fast-tracking investment in leakage to address it more quickly. They felt that longer-term, new technology would become available to enable them to go even further.
50. Future customers also felt that it was incumbent on water companies to provide more help to homeowners to repair leaks; ideas included offering insurance policies for customers, as well as helping with the cost of repairs for low-income families, students and other customers who may be struggling financially or have other challenges.
51. Using smart technology was seen to be important to help find and fix leaks more quickly. The idea that smart technology could help find problems before they happen was seen to be something that should be progressed wherever possible. Future customers also recognised that reducing leakage was an important factor is SES Water reducing its carbon emissions.
52. Through triangulating the various research sources, we consider that there is support from customers to go beyond the Government's target to halve leakage by 2050 and that they are prepared to pay more for us to increase investment in this area. As a result, our preferred business plan includes additional investment that will enable us to deliver additional leakage reduction between 2025 and 2030 and sets us on a path to reduce leakage by 50% by 2041 and by 62% by 2050.
53. Our affordability and acceptability testing (AAT) research showed that almost half of the HHs and three fifths off NHHs surveyed (47% of 60%) said that 'investing in reducing leakage by finding and fixing more leaks, managing pressure and finding leaks on customers pipes' for an additional £3.73 (HH) and 1.88% (NHH) a year, was the most important element of the strategic aim of 'delivering a resilient water supply from source to tap'. Almost three in ten HHs and a fifth of NHHs (29% of 19%) felt that 'working to make our water treatment works to be more secure and enhancing the water quality' at £2.73 (HH) and 1.37 (NHH) extra a year was most important. Just under one in ten HHs (9%) and one in six NHHs thought that 'schemes aimed at protecting sites from flooding and power outages' for an increase of £1.78 and 0.79% a year was most important. The AAT focus groups showed that both households and non-households think that leakage is a high priority, and that it was important to fix. Non-households commented that it is



treated water that is being lost, so it is a double blow as money is being spent to treat the water before it is lost.

### Environmental enhancement detailed triangulation

54. Delivering environmental enhancements also emerged as a key priority from our bespoke 2 research. Customers were presented with 11 key service areas that we consider important when making long term investment plans. Improving the environment and having a positive impact on our local area was of medium importance behind high quality water, leakage, ensuring affordability for all, ensuring there is enough water in the event of a drought and maintaining the infrastructure to avoid burst pipes. This aligns with the positioning of the environment in the collaborative priorities research.
55. These findings build on the customer insight we undertook at PR19, which although was somewhat limited, showed that serious pollution is unacceptable, that customers expected us to keep environmental impact to a minimum, and to protect the environment where possible. There was also a call for us to be future focused to address climate change and environmental concerns.
56. These concerns remain and have become increasingly important, such that they have become a significant part of the PR24 statutory regime, especially with the improvements required under WINEP and the addition of a biodiversity common performance commitment. Our early priorities research showed that as a minimum, customers expect us to protect the environment, but there is increasing evidence that many customers want us to go further. The same research showed that we could show our ambition by delivering a business plan that was industry leading in terms of the breadth of sustainability concerns (e.g. carbon, water scarcity, electric vehicles); and prioritising the natural environment e.g. elevating biodiversity benchmarking. Some customers found it difficult to understand the scale of some environmental enhancement and preferred the focus to be on more localised improvements.
57. The WRSE research for the regional WRMP showed that along with short-term efforts focusing on being more efficient with the water that is currently supplied and helping customers use less water, actions that deliver wider benefits and public value, such as catchment management initiatives are important in delivering an acceptable balance of supply and demand options. This finding is supported by our ongoing Citizens Panel which showed almost everyone (20 out of 21) agreed/strongly agreed that SES should use demand led approaches to reduce water usage before abstracting more from rivers.
58. The long-term plan to secure water supplies and improve resilience of the water system to drought and unexpected events should not at the expense of the environment. Indeed, supply options that have a net positive environmental impact and deliver wider public value (e.g. recreation and amenity) will be preferred. Use of chemicals, high energy use, and other unmitigated impacts are key reasons why some options are less favoured. The WRMP plans to leave more water in the environment, with abstraction levels projected to decrease at several sensitive sources including chalk streams.
59. This point shows further traction in our bespoke 2 research where almost half of customers, 46%, were aware of the link between water abstraction and chalk streams i.e. that continuing to abstract water from these streams could have a lasting environmental impact. Awareness increases significantly with age, rising to 62% for the over 65 years.
60. Indeed, our early priorities research shows that while there was little awareness about how water abstraction affects the changing nature of demand, customers were impressed with our ability to take the necessary steps to avoid negative environmental impacts.
61. To understand how ambitious customers expect us to be in delivering environmental enhancements, we provided choices to customers about vary levels of improvement. Of the five areas that we tested, environmental enhancements were ranked second most



important to invest in, with almost three quarters (71%) rating this as important or very important. Support is strongest amongst both age groups over 35 years but lower for the 18- 34 age group

62. When customers were presented with three differing options for the scale and pace of environmental improvements, along with their associated bill impacts, 72% supported further investment over and above the statutory requirements. Two out of three customers who supported additional investment opted for the highest level of environmental enhancement.
63. Future customers' views on enhancing the environment were mixed. Most were supportive of us going further than our legal requirements to improve biodiversity, river water quality and deliver wider benefits. Groups that were presented with bill impacts supported going further than what was mandated. Some chose to carry out environmental enhancement schemes across the two main rivers and chalk streams relied upon by SES Water; this was felt to be important to keep the water sources healthy and reduce treatment processes and costs in the long-term. Some chose to focus just on the two main rivers and make improvements to water quality. And others felt that the other activities we are prioritising in the short-term would help deliver long-term environmental improvements, and as such, didn't express an expectation that the company should go further at present.
64. Finally, our ESG assessment found that focusing on local communities would have a positive impact on people as it has the potential to further contribute to the environment (i.e. water resources) by raising awareness of the use of water.
65. By triangulating the various customer engagement studies, we consider that there is support from customers to go beyond statutory requirements, and an appetite for bill increases to pay for this enhanced investment. As a result, our preferred business plan includes additional investment that will enable us to deliver further environmental improvements between 2025 and 2030 and sets us towards making further improvements on the rivers Eden and Mole initially.
66. The AAT research showed that of the two elements put forward for enhancing the environment, almost half of HHs and NHHs (46% & 48 respectively) said that doing 'Work to enhance biodiversity on 70% of the land SES owns through improving land management' at 12 pence extra a year (0.06% NHH), was more important than 'enhancing the environment by increasing resilience and biodiversity on the river Eden'. At 11 pence more a year (0.04% NHH) on the water bill, this was supported by three in ten (29%) HHs and 42% NHHs
67. The qualitative element of the AAT research showed that the amounts to improve the environment were such a small investment, and that SES Water should just get on with doing them rather than talking about things.

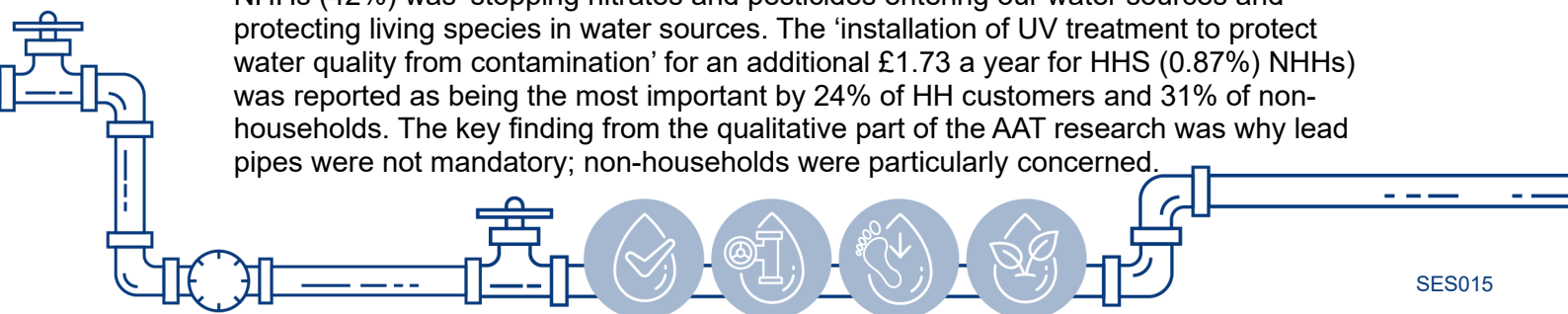
### Lead replacement detailed triangulation

68. The quality of tap water, most frequently defined by its appearance, taste and smell, continues to be the top priority for customers, both from an industry and company perspective. Indeed, at PR19, supplying water that meets quality standards was the highest priority for customers, and supplying water with an acceptable taste, smell and look was the third highest priority.
69. In triangulating all the various research sources, we have found that water that looks, tastes and smells good is still the highest priority. However, customers recognise our industry leading performance, and this is endorsed by our customer satisfaction figures on water aesthetics.
70. While high quality water is essential, our early priorities insight showed that keeping our natural water supplies free from pollutants and chemicals was also seen as an urgent



priority and could be dealt with by eliminating lead pipes. Although the level of cost and disruption to replace all lead pipes was recognised by people, there was evidence that some people wanted to see it given greater prioritisation. Lead was not tested at PR19, but we have explored and tested lead as an area for investment at PR24.

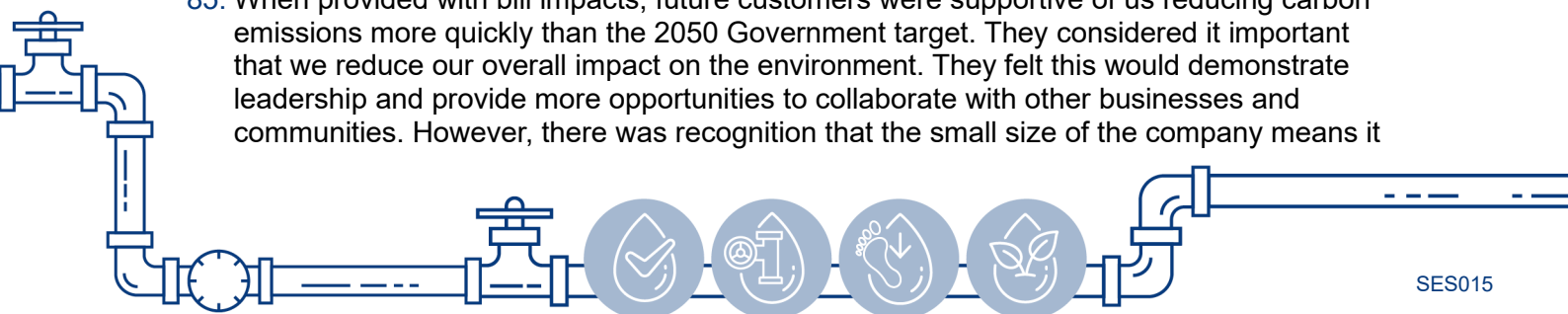
71. The earlier phases of customer engagement showed that, overall, the issues associated with lead were generally not well known or understood by customers. However, a resilient supply was often linked to other issues such as fixing leaks, bursts and replacing lead pipes. Our bespoke 2 research on long term outcomes, priorities and choices study showed that two thirds of people were aware of lead pipes in the water supply, but awareness varies with age, falling to only 31% for the youngest age group (18-34 years). Despite the apparent lack of awareness amongst younger customers, support for investment in the next 25 years is consistent across all age groups.
72. To test the pace and scale of lead investment over the longer term we provided various options for customers to consider. Prior to these options, which didn't show the bill impacts, we found that lead was seen as the third most important priority (out of five), with 76% saying it was important or very important to invest in. Support was broadly consistent across age, location and socio-economic groups.
73. When customers were presented with the four lead replacement investment options along with their associated bill impacts, there were quite differing views about the level and rate of investment. 30% supported the continuation of the current approach, which already goes above the statutory requirements as the company replaces lead pipes when lead is detected in lower concentrations than required by the regulations. 35% chose to target investment and replace more lead pipes in locations predominantly used by young people, such as nurseries, schools or colleges, who are more at risk of lead exposure, replacing them at about 250 sites every five years (35%).
74. The remaining customers chose an option that included both the current approach and the targeted approach described above, with additional investment to replace all company-owned lead pipes by either 2050 (20%) or 2075 (15%). This shows that 70% of customers in total, supported the targeted approach to replace lead in schools and colleges.
75. Future customers felt that the risk associated with lead was currently being managed but were supportive of the company targeting buildings such as schools and nurseries because of the higher risk to young people. They felt that full lead replacement was highly challenging and would be difficult to achieve.
76. We therefore consider that there is compelling evidence that customers want us to invest in replacing lead pipes, taking a targeted approach so we eliminate lead exposure in buildings to are predominantly frequented by children and young people. This investment was included in our preferred plan which we tested with customers for affordability and acceptability.
77. Of the three elements in the AAT survey that were put forward as part of the strategic theme of the provision of high-quality water from sustainable sources, the least important one for HH and NHH customers (15% and 19% respectively) was 'replacing lead pipes within schools and nurseries by 2030' for 97 pence extra a year, (0.49% NHHs). The most important aspect, that would increase the bill by 93 pence a year, for HHS and 0.47% for NHHs, and which was supported by almost half of HHS (49%) and two fifths of NHHs (42%) was 'stopping nitrates and pesticides entering our water sources and protecting living species in water sources'. The 'installation of UV treatment to protect water quality from contamination' for an additional £1.73 a year for HHS (0.87%) NHHs) was reported as being the most important by 24% of HH customers and 31% of non-households. The key finding from the qualitative part of the AAT research was why lead pipes were not mandatory; non-households were particularly concerned.





## Carbon detailed triangulation

78. There are several major challenges for the water industry including population growth, protecting the environment, the supply demand balance and climate change. In terms of the latter, the Government has set a target for the UK to achieve carbon net zero by 2050; this has implications for the water industry in England and Wales.
79. At PR19, we carried out very limited customer engagement on climate change and carbon net zero, suffice to say that we should be future focused, and looking at climate change issues more intentionally. Consequently, it has become a major focus for us to do what we can, both in terms of business as usual and further investment, especially as water companies are quite large producers of carbon emissions. This is reinforced by customers in our ongoing tracking survey where we ask customers to what extent they agree or disagree, on a scale of 1 to 5 where 1 is strongly disagree with the statement 'I am concerned about climate change' Over the last two to three years, the average ratings have been between 4 and 4.5.
80. In the early part of AMP7 much of the water industry committed to achieving its own target of achieving net zero for operational emissions by 2030, and for all emissions by 2045. Our early qualitative research indicated that achieving net zero by 2030 was mostly seen as a stretch ambition, although a minority wanted us to go even faster than by 2030. A deep dive with our citizens panel showed that customers were impressed with our current efforts to reduce CO2 emissions, and net zero by 2030 was seen as leading by example – 12 out of 19 said the target is 'what I'd expect', 5 said it was too ambitious, one not ambitious enough and one was unsure.
81. The same panel indicated that overall, people were unwilling to pay more to reach net zero sooner than 2030, but where there was a willingness to contribute more, customers wanted the money to be ringfenced. The collaborative research found carbon to be a lower level of priority.
82. Our bespoke 2 research on long term outcomes, priorities and choices told us that almost two thirds, 64%, said carbon net zero was important, or very important to invest in. and, approaching nine in ten, 86%, were aware of government target for net zero by 2050. Awareness amongst customers increases with age, with the highest proportion of customers who are not aware of the target in the 18-34 years group (25%). Despite the high awareness, customers considering investment to be important is almost a quarter lower
83. Out of four options that were presented on carbon net zero, and where bill impacts were shown, customers generally support reaching net zero by 2050, not earlier. A fifth (21%) would like us to achieve net zero earlier, and over a quarter (27%) would like to see net zero on operational emissions by 2030, and an accelerated programme of reducing overall emissions by 75% in 2035, with the remainder to be achieved by 2050. However, support for this last option, which accelerates operational carbon reductions, is stronger amongst ABC1 customers than C2DE ones.
84. In terms of future customers, some felt that we had already taken positive steps to reduce our carbon emissions and that others could have a greater impact than they could, so other things such as leakage and reducing demand – both of which will help lower carbon emissions – should be the focus over the short-term, but where they can, we should take steps to continue to lower their emissions
85. When provided with bill impacts, future customers were supportive of us reducing carbon emissions more quickly than the 2050 Government target. They considered it important that we reduce our overall impact on the environment. They felt this would demonstrate leadership and provide more opportunities to collaborate with other businesses and communities. However, there was recognition that the small size of the company means it

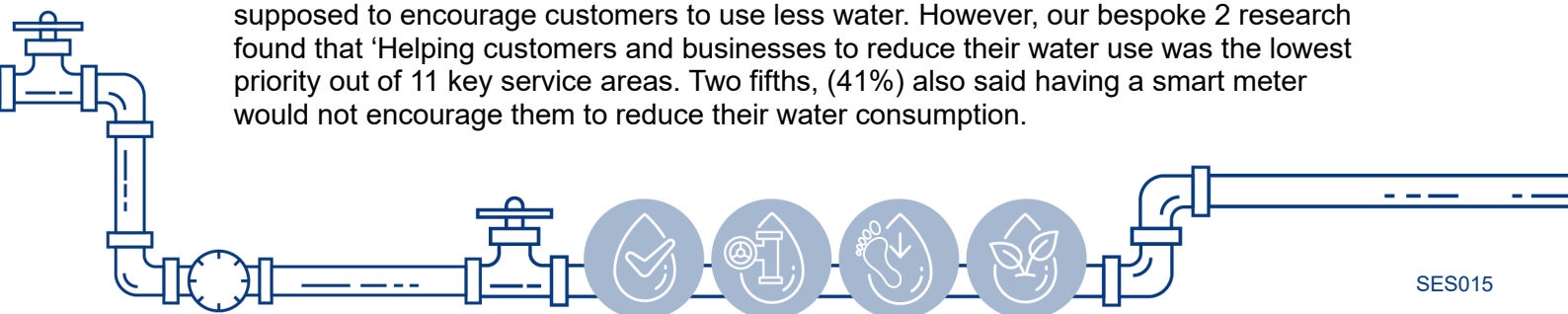


would have limited impact overall. Future customers also recognised that reducing leakage and PCC was an important factor in helping us to reduce carbon emissions.

86. Reducing carbon emissions is an area that polarises customers with some expecting us to show a high level of ambition while others preferring a steady approach. The evidence we have gathered and analysed, does not show that we have support to increase investment and bills to achieve the net zero carbon ahead of the 2050 target set by the Government. Having reviewed our net zero route map to align with Ofwat's performance commitment definition, we propose to take a more incremental approach to reducing carbon over the next 25 years and do not project to need any additional enhancement expenditure, instead focusing our efforts on reducing demand and replacing existing assets with low-carbon replacements as and when required.

### Smart metering detailed triangulation

87. Research at PR19 showed that metering was seen by most to be fair and acceptable, but that it must be well supported and incentivised. It also indicated that people were willing to pay for the wider rollout of the SES metering programme and we embarked on our universal metering programme to install meters in most homes between 2020 and 2025.
88. Evidence we have collected and analysed more recently shows people have mixed views about metering and demand reduction. Research conducted by WRSE shows that customers prefer to see a balance of supply side and demand-side activity and there is recognition that customers do have a role to play in this.
89. Some were keen to manage usage, prevent waste and monitor costs; others were concerned about potential bill increases and a perceived lack of accuracy. Our experience through our universal metering programme.
90. Smart meters also had a mixed appeal. Whilst many thought they were a positive, especially with current meters being largely inaccessible, some were sceptical about whether they would actually impact on their behaviour. Some said they would not use smart meters over billing concerns, others were more open as it could increase awareness of water usage.
91. Of the five investment areas which we tested and where there are clear choices for customers to influence the pace and level of investment, smart metering was seen as the least important to invest in, with just over two fifths (42%) rating it as important or very important to invest in; this was prior to any bill impacts being shown. Smart metering is the only investment area that shows variability by SEG grouping with more C2DEs considering investment to be very important than ABC1s, with a corresponding level of reduction in the percentage of C2DEs who consider it unimportant
92. Out of four possible investment options for increasing the rate of smart metering and where people were shown the different bill impacts, there was minimal support for any accelerated replacement of meters, almost four fifths (79%) saying 'meters should be replaced when required. The findings are consistent across different customer groups (age, location and SEG). Despite more 18-34 years customers ranking smart metering a higher priority, when presented with the bill impacts their investment choices align with other age groups. Presented with the findings from the quantitative research, 84% of participants agree with the survey preference to replace water meters with smart meters when required which aligns with 79% of survey respondents.
93. One of the advantages of smart meters, and standard meters generally, is that they are supposed to encourage customers to use less water. However, our bespoke 2 research found that 'Helping customers and businesses to reduce their water use was the lowest priority out of 11 key service areas. Two fifths, (41%) also said having a smart meter would not encourage them to reduce their water consumption.

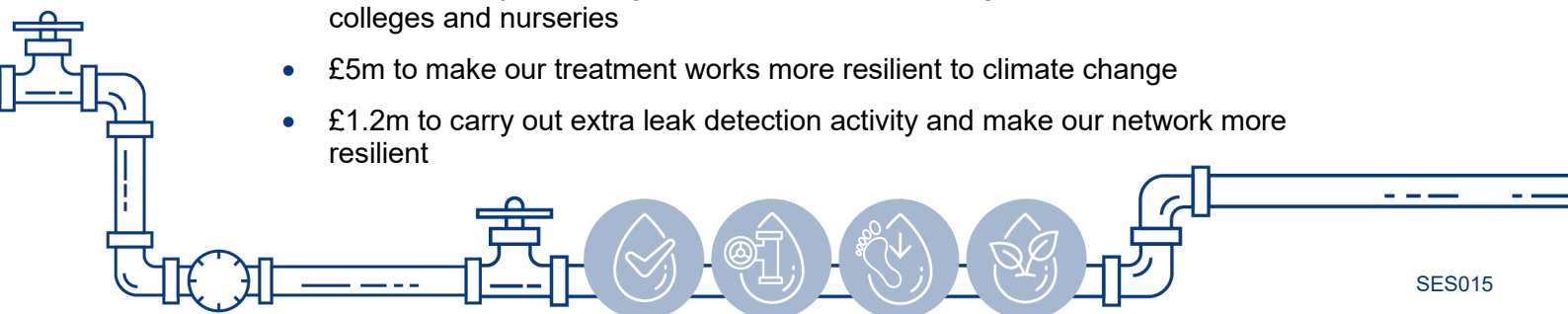


94. To understand why there was such a reticence towards smart meters we followed up the bespoke 2 quantitative study with some customer playback groups. When asked about what factors may drive customers' views, customers cite cost and affordability concerns, low priority for investment, concerns about smart meters, particularly amongst older customers, and wastage. These issues align with the findings from the survey.
95. To understand barriers to smart meters, the focus groups explored attitudes and perceptions. Participants' views on smart meters are more positive than expected but remain mixed. The potential barriers to implementation identified are cost to install and who funds the meter, consequential potential impact on charging and tariffs, disputed benefits of smart meters in supporting customers to reduce water usage and save money, security of the technology and understanding the potential for smart meters to help identify and reduce leakage.
96. Reducing demand for water was seen to be a priority for future bill payers who felt we should roll out smart meters over the next five years to support a more rapid reduction in water use. When provided with bill impacts, future bill payers chose to roll out smart meters over a 10-year period.
97. Smart metering was seen to raise awareness and help target information and support. The role of smart metering to help identify leaks was recognised and the opportunity to save energy was also identified; this was seen to be particularly important now due to the cost-of-living crisis.
98. It was also felt that we should do more to help customers reduce their consumption; providing the opportunity to help customers reduce their bills was also felt to be important. Some customers feel that the benefits of smart meters may not be clear which limits acceptability. Despite discussions on water availability and usage, participants did not support investment to accelerate smart meters.
99. The AAT research showed there is support for both elements of our proposed business plan as it pertains to reducing household water use. Over three fifths of HH customers (62%), and just over half NHHs (52%) said 'extra water efficiency support for customers (69p a year for HHs and 0.35% for NHHs), was more important than 'providing smart meters to 192,000 homes and businesses with a customer friendly way of monitoring their water use'. At £7.94 extra year on the water bill for HHs and 3.99% for NHHs, one fifth said this was more important out of the two options, compared to 39% of NHHs.
100. In the AAT focus groups, some queried whether smart meters will work, and that SES Water should focus more on behavioural change. People also felt that a clear and targeted communications campaign was required around the benefits of smart meters. NHHs were less keen on smart meters and questioned whether they would make a difference.

## Decision point 2 – identification of our preferred PR24 plan

101. The triangulation carried out and detailed above, led us to identify our preferred plan for PR24, as well as 'least cost' plan which only included the investment we needed to make to meet the relevant statutory, regulatory and policy requirements.
102. Our preferred plan included the following enhancement investment on top of the £45.4m of investment required in the least cost plan:

- £4.4m to carry out a targeted lead replacement programme at 170 schools, colleges and nurseries
- £5m to make our treatment works more resilient to climate change
- £1.2m to carry out extra leak detection activity and make our network more resilient

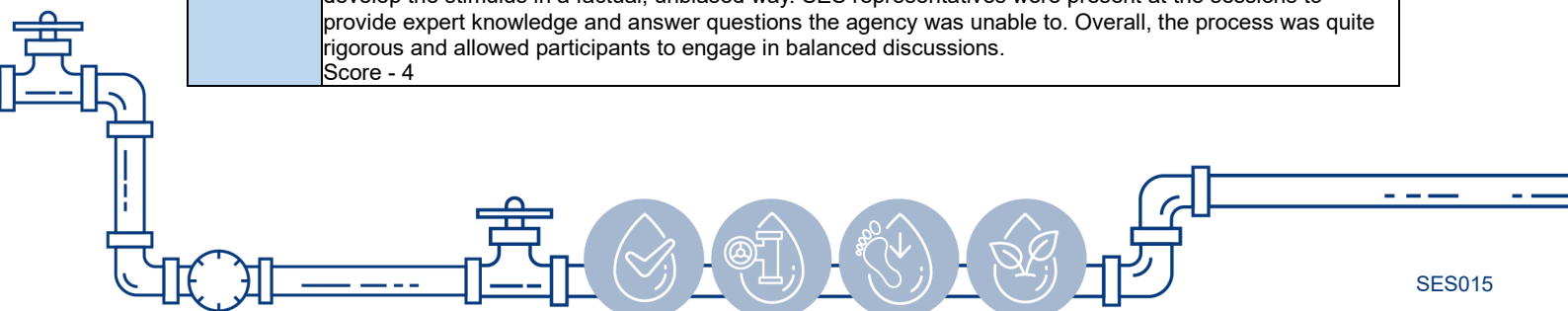


- £9.1m to fast-track smart meter installation with a focus on using them to detect leaks and wastage at customers’ home and businesses
- £0.6m to deliver environmental enhancement and biodiversity gain through a catchment scheme on the River Eden.

### Customer research triangulation table assessment

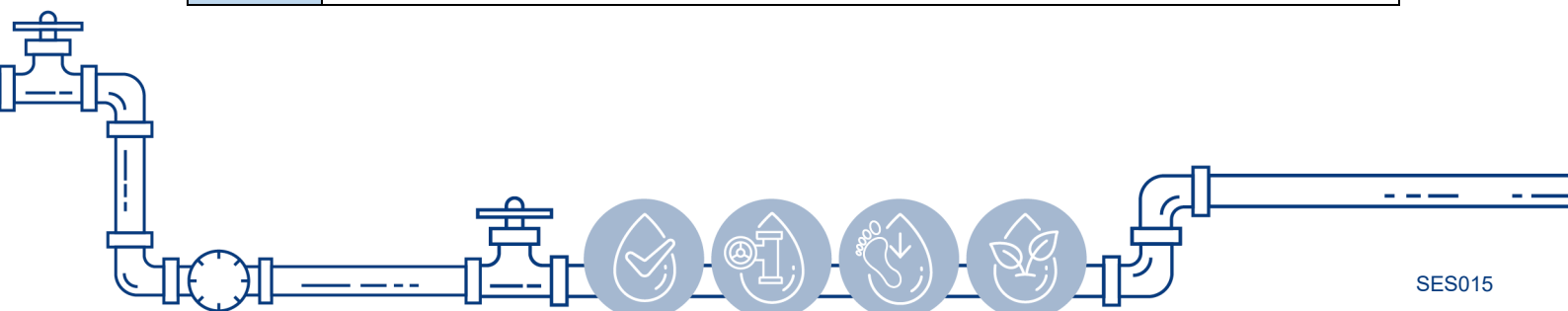
<b>Engagement Stream</b>	PR1- Purpose Research, May 2021
<b>Representative &amp; inclusivity</b>	Overall, the research was both representative and inclusive, designed to ensure coverage of a wide range of customers & stakeholders (business?) <b>Qualitative</b> – 3 customer w/shops - 18 household (HH) customers across 3 customer groups (1 x future customers, 1x older families, 1 x young families); 4 colleague co-creation w/shops; 5 colleague listening groups (54 colleagues), 5 senior stakeholder interviews, Community w/shop (6 reps) and a Board session The research was independently designed with topic guides and stimulus material being produced by Given to ensure against any bias and leading of customers. The outputs were reported accurately and fairly, and were a fair reflection of what participants said <b>Score - 4</b>
<b>Robustly gathered and undertaken</b>	The research methodology and sample were appropriate for the research objectives. The research was neutrally designed and free from bias and participants understood what was being asked of them. All the regular elements of set up meetings, topic guides, stimulus materials, analysis and reporting were rigorously followed, and the findings were presented in a fair and balanced way <b>Score - 4</b>
<b>Effectively reviewed and analysed</b>	The purpose of the research was 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. It therefore played a key role in setting the framework for the LTDS, the research was presented in the context of a wider evidence base and was independently assured by both our CSP and Board, the latter having a playback and review session <b>Score - 4</b>
<b>Contribution to the plan</b>	While this research was set up with the long-term purpose of SES in mind, the topics below will be revisited on a regular basis: The value of water Long term sustainability Environmental impact Role in local communities. The research played a crucial role in shaping the long-term vision, ambition and priorities. While the research was shared internally and the CSP, it has not been published on the company website. The extent to which regulators are aware is unclear, but both the EA and CCWater are part of the CSP. Score - 3
<b>Overall assessment</b>	<b>15 - Good quality research</b>

<b>Engagement Stream</b>	PR2 - Water Citizens Panel, August 2021
<b>Representative &amp; inclusivity</b>	A range of HH customers were invited to participate in 4 online deliberative sessions, 2 hours each. There were 21 HH customers in total split as follows: Age - 4x18-34, 10x35-44, 1x45-54, 4x55-64, 2x65-74; SEG - 13xABC1, 8xC2DE. These splits, while representative of the SES customer base, lean more to younger age groups and higher social grades The research format was independently set up and facilitated by the research agency with all the relevant materials produced in a neutral way, by Explain, to ensure there was no company agenda. The discussion points from each session were clearly interpreted and had a clear link to the objectives of the research. <b>Score - 3</b>
<b>Robustly gathered and undertaken</b>	Each session, a different topic was discussed and covered in considerable depth to ensure a full investigation of the issues. The approach for each session involved scene setting to provide the relevant context and then a series of questions to discuss in breakout sessions. It was therefore a suitable way of meeting the research objectives. Clear briefing of the topics was provided by SES so that the agency could develop the stimulus in a factual, unbiased way. SES representatives were present at the sessions to provide expert knowledge and answer questions the agency was unable to. Overall, the process was quite rigorous and allowed participants to engage in balanced discussions. Score - 4



<b>Effectively reviewed and analysed</b>	The aims of the research were clear, which were to explore opinions and attitudes on a range of topics including the drought plan, net zero, resilience and SES business. Drought plan: education on drought impact & projections, water resource management, Resilience: shocks & stresses to SES, climate resilience & dealing with wider industry pressures of population growth and environmental protection Net-zero: principles of net zero, climate change, water efficiency & willingness to pay. The importance of the research to SES was to ensure it got an early steer to inform its drought and water resource planning. However, it lacked both independent assurance and validation Score - 3
<b>Contribution to the plan</b>	All the topics covered in the research are strategic, long term planning issues, which have been revisited throughout the customer engagement process and that will continue to be tracked on an ongoing basis via various customer feedback mechanisms e.g. surveys, the SES online panel and focus groups. While there was some credible insight that informed the issues central to business planning, it did not have much traction internally, and has not been shared more widely with customers and stakeholders Score - 2
<b>Overall assessment</b>	<b>12 - Average quality research</b>

<b>Engagement Stream</b>	BAU1 - Voice of the Customer Research
<b>Representative &amp; inclusivity</b>	Telephone (CATI) interviews - 400 HH & 100 vulnerable customers a quarter; (1600 & 400 pa). We send Explain, the market research agency, a full customer contact list once a year and they randomly pick customers from that to contact. The data for each quarter is then randomly selected to allow a mix of respondent demographic information. All data is exhausted before receiving more from SES Water to ensure every customer included in the data file has the opportunity to take part in the Voice of the Customer survey. Every customer has an equal chance of being included in each quarter, although if they have recently taken part in similar research, they are excluded. Apart from this, there are no exclusions which means the sample is inclusive and unbiased. Because everyone has the same chance of being included, The demographic split of the 400 HH sample vary each quarter but they are broadly as follows: Gender: Male 52%, Female 48%; SEG: ABC1 70%, C2DE 30%; Age: 18-34 10%, 34-44 17%, 45-54 14%, 55-64 18%, 65+ 35%; Water meter: Yes 65%, No 28%; HH composition: 1 person 24%, 2 people 36%, 3 people 15%; 4 people 14%; 5 or more 5%; Garden: Yes 80%, No 16%. There are some segments where the sample is overweight (ABC1) and underweight (18-34), but this is still broadly representative of our customer base which is both more affluent and has a higher penetration of people in the older age groups than other water companies. It is also symptomatic of the random sample that is utilised. Notwithstanding the above, we do supplement the HH sample with people who are deemed to be in vulnerable circumstances such as medical and financial vulnerability. This sample seems to compensate for the lack of C2DEs, as generally, an extra 15% are included in this sample, so c. 45% of 30% in the main HH sample. Explain carried out the design of the research, although it is based on Ofwat's C-MeX survey. As such, it is neither leading nor bias in the way questions are asked. Similarly, the reporting provides a fair and balanced set of results which highlight where SES Water has done well and where it needs to improve. The findings are substantiated by quotes. <b>Score - 4</b>
<b>Robustly gathered and undertaken</b>	The research is carried out quarterly to track trends and to see how customer perceptions change over time. All surveys are completed by Explains team of in-house telephone interviewers, all interviewers are fully trained on how to conduct interviews in line with MRS guidelines and are experienced in how to remain impartial throughout interviews. All interviewers working on the project are given a full brief, including background of SES Water, background of the project and objectives of the project. In the introduction of the survey, interviewers read out a paragraph detailing that they are calling on behalf of SES Water, confirmation of approximately how long the survey will take and what they questions are about. Participants are reassured in the script that they do not have to answer any questions they do not wish to, they can terminate the interview at any point and that the call will be conducted in line with the MRS guidelines. They are also made aware that the call will be recorded and that they have the right to remain anonymous. The survey includes screening out questions to ensure customers have not taken part in other relevant research for SES Water recently and to ensure they are customers of SES Water. At the end of the survey, participants are given the option to remain anonymous and informed how long their data may be kept for but also that they have the right to access or withdraw the use of their data at any time. Overall, the survey is fit for purpose Score - 3



<p><b>Effectively reviewed and analysed</b></p>	<p>The objectives of the domestic and vulnerable tracking surveys are to explore: i) overall satisfaction with SES Water and the services provided to customers, as well as satisfaction with specific areas of their water service; ii) customer perceptions of the importance of being water efficient and conscious; iii) customer satisfaction with the value for money provided by the services they receive and overall affordability of water; and iv) awareness and perceived helpfulness of the additional services offered to vulnerable customers</p> <p>The team at Explain gather all of the information from the customer surveys and collate into a single document. This view is then analysed with the C-MEX quarterly result to understand the themes which are developing, and this information is then presented back to SES via a debrief session.</p> <p>Explain uses the industry standard confidence interval of 95% when looking at population samples. This means that 95% of the time the sample we use will be an accurate estimation of the population being measured. In other words, when we run the study, nineteen times out of twenty we will get meaningful results. The margin of error determines the range of scores. So, for example, if we find that 80% of people think that option A is a good idea, then there is a 95% chance that in the population, between 75% &amp; 85% (80% ±5%) would choose option A</p> <p>Results are shared with management and relevant teams internally, as well as with the CSP. As the survey has been running several years alongside Ofwat's C-Mex survey, CSP's role is minimal in terms of content, but clearly it has a role in terms making sure action plans are implemented as themes emerge from the research.</p> <p><b>Score - 4</b></p>
<p><b>Contribution to the plan</b></p>	<p>The topics covered as standard revolve around water quality, reliability of supply, affordability, trust, customer satisfaction and perception of value. Because it is a quarterly survey, these issues have been tracked historically for a period of time and will continue to be going forward. Explain also capture verbatims from customers when they delve deeper into customers responses whilst conducting the survey. These have highlighted issues in the past around pressure, billing. This information has helped to corroborate what areas are important to our customers and the type of action they wanted to take on them - i.e. improve further or maintain.</p> <p>It is unclear how SES Water has linked actions taken to the research findings and this is something it could improve on going forward. It also needs to publish survey results more widely on a regular basis.</p> <p><b>Score - 3</b></p>
<p><b>Overall assessment</b></p>	<p><b>14 - Good quality research</b></p>

<p><b>Engagement Stream</b></p>	<p>CR1 - Water Resource Management Plan (WRMP) for WRSE</p>
<p><b>Representative &amp; inclusivity</b></p>	<p>This study involved customers from all six WRSE companies, as well as UU, Severn Trent, Anglian and South West Water. The qualitative research included HH participants from a wide range of backgrounds, including age, SEG, ethnicity and whether people had health issues. Geographically, people were also drawn from various parts of company areas, to ensure even representation across company areas.</p> <p><b>Qualitative</b> – 10 reconvened online focus groups from 10 participating companies; - c. 80 HH customers in total. <b>Quantitative</b> – 2,300 household customers and 350 non-household customers. Accordingly, the study was both representative and inclusive of the customer bases of participating companies. The design of the research programme was undertaken by Eftec, who are well known to the water industry. Eftec partnered with ICS Consulting who designed the format and process of the qualitative research.</p> <p>The materials were circulated to water companies and CCGs to ensure both accuracy and neutrality, All the survey materials were independently designed and produced by Eftec to ensure no bias.</p> <p>The findings of both the qualitative and quantitative elements of the report compared and contrasted various participant perspectives in a full and comprehensive way and did so in a way that was a fair representation of how and what people answered the questions.</p> <p>Score - 5</p>



<b>Robustly gathered and undertaken</b>	<p>The research programme involved three stages i) desk research; ii) qualitative; and iii) quantitative, the latter using a choice experiment approach. The desk research built on PR19 WRMPs as the basis for developing the regional WRSE plan. It also involved interviews with relevant company managers to understand potential supply and demand solutions for putting forward into research. These interviews and conversations also considered legislative requirements from government and the EA. The desk research informed the development of the qualitative research, which in turn, informed the design of the survey. In the qualitative stage, the first group acted as a pilot group to ensure the approach worked, as well as making sure people understood the various concepts and terminology. A suite of demand management measures and options to increase water supply were discussed, including smart metering, water efficiency measures, reducing leakage, new reservoirs, waste recycling, greater use of groundwater supplies and water transfers. The pros and cons for each of the measures were discussed, but due to time constraints, not all the measures were explored. The reconvened approach allowed the opportunity for people to complete homework tasks which included all of the demand management measures and water supply options, each with the pros and cons. Participants were asked to rank each option in preference order and return the homework so that the results could be tabulated for discussion in the second session.</p> <p>The outputs from the qualitative served as useful standalone findings, as well informing the design of the survey. The core part of the survey was paired comparison element where people were trading off various water resource plan options. Each plan that was presented included information on the resilience to withstand unexpected event events and adaptability to future changes (e.g., population increase and climate change), as well as environmental implications and what it meant for customers. Indicative costs of each plan were also presented. To help people make informed decisions about their choices, extensive stimuli was provided about planning for the future, protecting the environment, water shortages and drought measures, reducing water use and increasing the amount of water in supply. As well as the paired comparison element, various validity questions where people were asked to what they agreed or disagreed with a range of statements. Prior to launching the survey, it was tested via a set of cognitive interviews to make sure it was both clear and straightforward to understand, avoiding any ambiguities.</p> <p>As a result of this very thorough process, people were clear what was being asked of them. This is a good example of best practise research, where a wider evidence base was considered, and which allowed participants to discuss the issues in a balanced and impartial manner. Subsequently this customer engagement piece was fully fit for purpose.</p> <p><b>Score - 5</b></p>
<b>Effectively reviewed and analysed</b>	<p>WRMPs are reviewed every 5 years as part of a longer-term planning process, ie.25 years. However, while WRMP customer engagement is undertaken as part of the price review process, the actual plans are monitored on an ongoing basis to see if any adaptation to the plans is required due to external pressures e.g. changes in predicted population growth or accelerated climate change issues. As such, the research is of vital importance and highly relevant in the development of both individual company WRMPs, as well as regional plans. The rationale for the research is therefore very clear, as is what the insight is contributing to. Specifically, the research looked at how external factors were putting water supplies under pressure, why that was the case and what could be done about it. A range of demand and supply solutions were presented to customers, who were asked to say what solutions they preferred. Throughout the programme of research, CCGs and other stakeholders were involved, whether commenting on the materials or observing the groups. It also made wider use of a range of data sets to help interpret the results. Finally, the research was subject to a rigorous and independent assurance process, with both the regional CCG and our own CSP.</p> <p><b>Score - 4</b></p>
<b>Contribution to the plan</b>	<p>As mentioned, WRMPs are monitored on an ongoing basis. Therefore, customer engagement on these matters is carried out at regular intervals. This is one of the most significant PR24 engagement studies undertaken on behalf of SES as it informs one of the key regulatory submissions i.e. the WRMP. It has therefore made a vital contribution to SES's business planning process and decision making. The results of the research were shared in full with regulators and third-party stakeholders, but less so with customers. However, customers have been invited to comment on the plan via both the Drought Management Plan and LTDS consultations, both of which included customers' views, attitudes and preferences</p> <p><b>Score - 4</b></p>
<b>Overall assessment</b>	<p><b>18 - Excellent quality research</b></p>

<b>Engagement Stream</b>	PR3 - Customer Priorities Research, August 2022
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<b>Representative &amp; inclusivity</b>	<p>To inform and explore long term customer priorities, a qualitative research programme was developed that included the following: 5 two-hour customer workshops (4 online and one in person). Four of the workshops were held with HH customers and one with pre-family/future customers. The four HH groups were split into different life stages as follows: young family, wealthy mid-lifers, empty nesters, less tech savvy. This was a different approach to the more standard segmentation of SEG, age and gender demographics, as it considered how discrete segments might have different motivations and attitudes towards potential SES priorities. As well as workshops with HH customers, a series of 1:1 interviews were undertaken - 5 with vulnerable customers and 4 non-households (NHH). The research was developed by Given, who carried out the Purpose research. Given were provided with the potential priority areas and relevant accompanying information, and from this, they independently developed the requisite materials for use in the workshops. The reporting of the results was undertaken in a systematics way, making sure that the feedback from the discrete segments listed above were credibly interpreted and accurately represented.</p> <p>Score -5</p>
<b>Robustly gathered and undertaken</b>	<p>As the research was about exploring and informing a range of issues, the most appropriate way to do this was to use a mix of qualitative methods to suit the various audiences. The two-hour workshops with HH customers allowed time for the all the various contextual information to be considered before discussing each of the issues. As well as gleaning customer views on the various topics, the first workshop acted as a pilot for future workshops so that any glitches could be removed, the discussion streamlined, and the time maximised. As the research covered an extensive list of topics, it made use of a wide range of inputs, including government targets, future legislation &amp; current levels of performance. Although this meant there was a lot of information to consider, it was important context for participants, as it enabled a more fulsome understanding of the questions they were being asked to feedback on. These factors, along with the independent nature and neutral design of the research, means that the research was fit for purpose.</p> <p>Score - 4</p>
<b>Effectively reviewed and analysed</b>	<p>The main objective of the research was to create a set of priorities for SES Water customers that aligned with the company's purpose and acted as the foundation for its Long-Term Delivery Strategy, and how ambitious it should be. As such, it was a strategic research study that set out the company's direction for short- and longer-term investment, especially where the focus was likely to be for PR24. It was therefore very clear why the research was being undertaken and that there was a high degree of practical relevance for its application in terms of the LTDS and WRMP, as well as wider business panning. There were 8 topics covered in total, which were;</p> <ul style="list-style-type: none"> <li>High quality water</li> <li>Sustainable and resilient supplies</li> <li>Minimise wastage and interruptions</li> <li>Reducing water consumption</li> <li>Customer service</li> <li>Support for vulnerable customers, including bill affordability</li> <li>Positive impact on communities</li> <li>Improve the environment</li> </ul> <p>While the findings provided an excellent framework for future customer engagement around PR24 priorities, and an enabler for drilling down further into the key issues, they received partial independent assurance</p> <p>Score - 4</p>
<b>Contribution to the plan</b>	<p>The topics discussed in this research are core to SES's business planning, and performance on these matters are measured and monitored on a continual basis. As such, SES continually gathers customer feedback on these issues. The findings of the research were central to the development of the LTDS, and the overarching themes of the business plan emerged from this study; it has therefore played a key role in producing the business plan. Indeed, every research study hereafter shows how the outputs fit into each of the overarching themes. Furthermore, each element of SES Water's proposed enhancement spend falls into one of these themes. As well as informing the LTDS, ambition and priorities, it has also helped validate the common performance commitments. The results of the research were shared in full with SES management and the CSP. The results have also been fed back indirectly to stakeholders and customers through publishing the LTDS on the website. However, more proactive sharing of the findings in the public domain could have been achieved</p> <p>Score - 3</p>
<b>Overall assessment</b>	<p><b>16 - Good quality research</b></p>

<b>Engagement Stream</b>	PR4 - Materiality Assessment, August 2022
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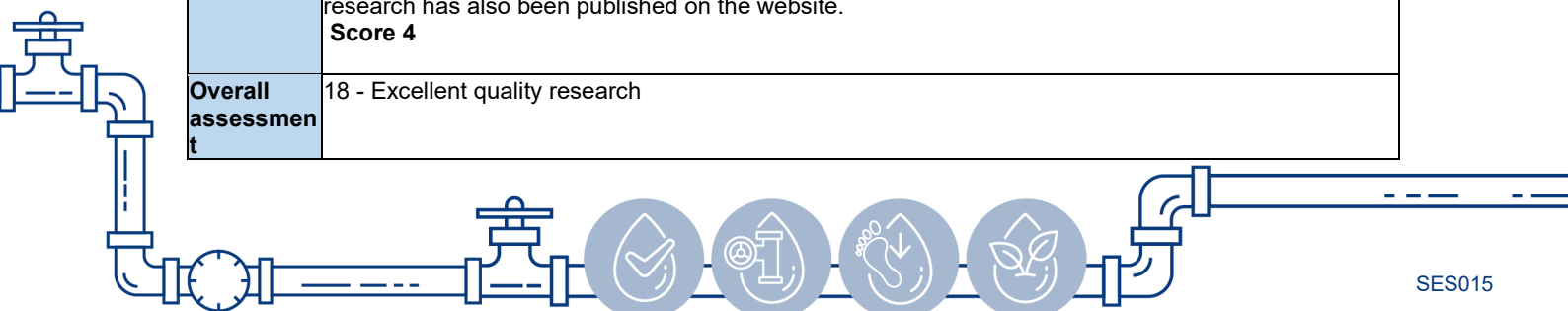


<p><b>Representative &amp; inclusivity</b></p>	<p>To understand stakeholder perceptions around environmental, social and governance (ESG) issues, a stakeholder engagement study was undertaken by Sphera. It comprised a quantitative online survey with 31 internal stakeholders and 23 external (54 overall); this was followed by interviews with selected stakeholders as follows: Board Member; SES Water Employee or Management; Household Customer; Investor / Shareholder; NGO (Environmental Association &amp; Charity); Local Council / Public Authority; Educational Sector; Housing / Residents Association; Supplier / Partner &amp; Regulatory Bodies</p> <p>Being a stakeholder study, the number of people involved was necessarily focused on specific audiences. While 54 participants is a reasonable number of participants for this kind of study, it would have been more desirable to have a higher number of external stakeholders take part, as this would have provided a better and more impartial balance of views. It would also have been good to include businesses and retailers in the list of stakeholders to this end, the audience was not as wide-ranging and inclusive as it could have been. The engagement followed Sphera's tried and tested process for ESG studies, meaning that the design was neutral and was devoid of any bias. <b>Score - 3</b></p>
<p><b>Robustly gathered and undertaken</b></p>	<p>The project followed a clear structure of six tasks, with defined milestones and deliverables - i) project set up ii) issue identification iii) stakeholder mapping iv) online stakeholder survey v) follow up interviews and vi) reporting. This enabled a systematic approach to the study which meant that any subjectivity was removed and the opportunities for bias mitigated.</p> <p>Although the sampling approach could have been stronger, the overall approach of a mixed methodology was entirely appropriate in terms of the stated objectives. However, for a study of strategic importance, and in trying to engage a wide range of third-party stakeholders, we feel there are more effective ways of doing a survey than using Survey Monkey. On the positive side, it was very clear to participants what was being asked of them and they had no issues in answering the questions.</p> <p>Score - 3</p>
<p><b>Effectively reviewed and analysed</b></p>	<p>To purpose of the research was to conduct a stakeholder materiality assessment on ESG issues aiming to be a starting point for integrating material aspects of sustainability into joint management and evaluation processes</p> <p><b>Environment:</b> Water resources; Water quality; Waste &amp; effluents; Biodiversity; Energy consumption; Climate change; Greenhouse Gas Emissions</p> <p><b>Social:</b> Occupational health &amp; safety; Training &amp; education; Diversity &amp; equal opportunities; Local communities; Customer centric water services; Water affordability &amp; access; Cyber security / data privacy</p> <p><b>Governance:</b> Economic performance; Tax; Anti-competitive behaviour; Sustainable supply chain</p> <p>ESG issues are important at any time for a business, but especially so for a monopoly, and because the water industry has faced criticism about its ESG performance in the last year or so, and particularly around environmental and governance issues. Clearly therefore, the research is highly relevant to the business going forward; and in terms of being a socially responsible company it was clear why the research was carried out and how it would contribute to SES's business planning. What the research lacked however was effective analysis alongside a wider evidence base. And while it was reviewed by the SES Board, it was not subject to any independent validation and assurance.</p> <p>Score - 3</p>
<p><b>Contribution to the plan</b></p>	<p>Many of the issues in the research will be subject to customer insight and engagement on a regular and continual basis, especially in the environment category. Equally, many of the social and governance issues will be monitored as part of business as usual. We suggest that, as this study was a benchmark for ESG measurement, that SES plans ESG trackers once every two years as a minimum. At the moment, it is unclear what process is in place to make this a continual engagement piece.</p> <p>While there are some good outputs from this research, it is unclear how it has contributed to the business plan. It is also unclear the extent to which the results and findings of the study have been shared fuller with both stakeholders (CSP &amp; regulators) and customers. It does not appear to have been published on the SES website</p> <p><b>Score - 2</b></p>
<p><b>Overall assessment</b></p>	<p><b>11 - Average quality research</b></p>

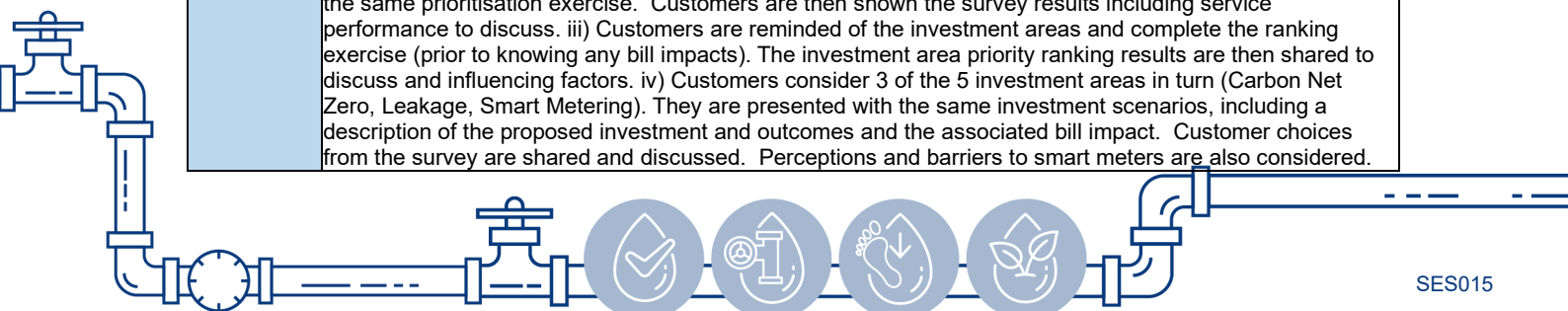
<p><b>Engagement Stream</b></p>	<p>PR5 - Future customers: priorities and choices</p>
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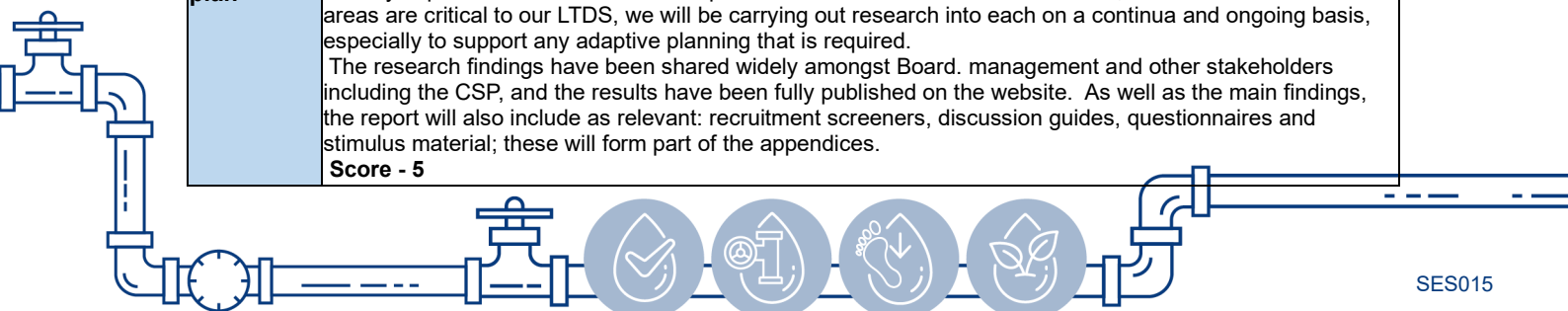
<p><b>Representative &amp; inclusivity</b></p>	<p>To understand what future customers, feel about the pace and ambition of five areas of enhanced investment, we carried out two qualitative interactive workshops.</p> <p>Workshop 1 followed visit to Bough Beech reservoir and education centre. It comprised members of the Surrey CC Youth Cabinet and a group called ATLAS, a young person's group with additional needs. and different ages (aged 15 to 23).</p> <p>Workshop 2 followed a week of work experience at SES and comprised – year 10 students from XX (aged 14-15) The specificity of the audience meant that the normal breadth of customers was not required. However, even within this niche audience, we managed to achieve an extensive range of future customers including GCSE &amp; A level students, through to university students, post grads. Surrey CC facilitates opportunities for these young people to engage in issues that are important to them, including improving the environment, climate change and mental health, so it was a great opportunity for us to partner with them.</p> <p>For this narrow segment, we therefore believe we this represents a very inclusive set of future customers. To ensure the research was free from bias and neutral in its execution, Create 51. a specialist communications consultancy with expertise in running workshops, designed and facilitated the sessions. This is evidenced in the next column, 'robustly gathered and undertaken', which details the design. The framework outlined enabled a very clear process in terms of what questions to ask, and how, as well as what stimulus was made available. In turn, this allowed for a balanced set of outputs where future customers were able to clearly articulate their priorities, both now and in the longer term.</p> <p><b>Score - 5</b></p>
<p><b>Robustly gathered and undertaken</b></p>	<p>Workshop 1 was split into two parts:</p> <ul style="list-style-type: none"> <li>- Part one: a tour of Bough Beech Water Supply Works and the purpose-built education facility 'Flow Zone' which is used for school tours as part of SES Water's wider education programme, delivered by SES Water's education tutor</li> <li>- Part two: an interactive workshop led by an independent facilitator to explore the young people's understanding of water issues and understand their priorities for the future.             <ul style="list-style-type: none"> <li>i) Warm up and application of what we've learnt so far - delegates were provided with photographs of different parts of the water supply process and asked to put them in order and explain their reasoning.</li> <li>ii) Future challenges facing the water sector- delegates were asked to think about what factors might impact on how water is supplied in the future – both challenge and opportunities – with the aim being to identify four key areas (population growth, climate change, technology and environmental protection). Each of these factors were explored in more detail to identify what could happen, and the impact it could have on water supplies, to set the long-term context to make the discussion around long-term priorities more meaningful</li> <li>iii) Priorities for the future – what should SES Water do to meet the challenges it is facing. Delegates were split into two groups and provided with fact sheets about six areas (next column) where the company could do more to improve its service. Each fact sheet had information on the current situation (including comparative performance where available), how it could be improved, potential benefits and issues, and options for what the company could do. This ensured participants were provided a range of inputs that enabled them to have an informed discussion, which in turn, provided an opportunity for balanced decision making. Each group was asked to identify which areas they felt were most important to prioritise and for each, which option they felt would be most appropriate to tackle in the future, and explain their reasoning</li> <li>iv) Feedback session to present back group discussion</li> </ul> </li> </ul> <p><b>Score - 5</b></p>
<p><b>Effectively reviewed and analysed</b></p>	<p>The main aims of these workshops were 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. It also sought to ascertain what future customers thought the long-term challenges were for SES and how we could address them. The six priority areas were as follows: i) PCC reduction; ii) leakage; iii) net zero carbon; iv) lead; v) environmental enhancement; vi) interruptions to supply. Focusing on these issues where there were some real choices, as opposed to required statutory improvements, meant the research was highly practical and relevant. Participants were informed why the research was being undertaken and that they had a very important role to play in contributing to the development of our business plan.</p> <p>The research findings were presented alongside previous research that was undertaken, so that the results were in the context of a wider evidence base.</p> <p>In terms of validation, CSP members reviewed all the workshop materials in advance, and some CSP members were attended the second workshop. At the end of the process, the findings were subject to independent assurance and validation from both the Board and CSP.</p> <p><b>Score 4</b></p>
<p><b>Contribution to the plan</b></p>	<p>These priority areas are foundational to our PR24 business plan as all of them will be subject to the common performance commitment framework. As such, they will be continually tracked and measured through various customer engagement, either from a company or industry perspective. Furthermore, all the priority areas, apart from interruptions to supply have contributed to the ambition and sequencing of our LTDS, as well as informing our PR24 enhancement claims.</p> <p>The findings of the research have been shared quite fully, both internally and with the CSP. The research has also been published on the website.</p> <p><b>Score 4</b></p>
<p><b>Overall assessment</b></p>	<p>18 - Excellent quality research</p>



<b>Engagement Stream</b>	PR6 - Customer priorities, choices and outcomes
<b>Representative &amp; inclusivity</b>	<p>To understand customer views and priorities to inform long-term 25-year planning (LTDS) and AMP8 (2025-2030), a two-stage customer research study was carried out. First a <b>quantitative</b> survey comprising 680+ HH customers, followed by four customer playback focus groups. The survey achieved 680 interviews was representative of our customer base with the following splits: Location - 59% Surrey, 41% London; SEG - 72% ABC1, 28% C2DE; Gender - 53% men, 47% women; Age - 18-34 7%; 35-64 60%, 65+ 33%; 9% reported disability or restricted mobility. Although these proportions are broadly representative of our customer base, i.e., an area of high affluence and more customers in the older age groups, younger customers are under-represented. To mitigate this, all the findings have been analysed and adjusted for age as appropriate. 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.</p> <p>The four focus groups were split as follows: two in the London area and two in the Surrey area, 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 people from a different ethnic origin of 'White British' as well as good combination of people at different life stages and whether they had a water meter or not. The recruitment also showed there was a good mix of people owning or renting their own home and whether participants had long term health issues. Overall, the research was very inclusive in terms of a number of considerations, as well as being representative of our customer base.</p> <p>ICS Consulting, a company with considerable and extensive experience of conducting customer research in the water industry designed and implemented the study. They paid careful attention to ensure both stages were factual in terms of the information and stimulus provided, and non-leading in the way questions were asked. In particular, the survey was designed to ensure that the questions were in an intuitive and sensible order, to ensure against any bias. Selective reporting was also avoided by ensuring there was a balance of views, especially where participants had differing views.</p> <p>Score - 5</p>
<b>Robustly gathered and undertaken</b>	<p>The project followed a multi-faceted process. Having identified where there were meaningful choices for customers to influence water services, ICS held internal sessions with SES to understand in more detail the different levels and pace of investment for each of the five priority areas. From this, a range of service improvement descriptions were put together along with three or four scenarios for each service area; this information provided the bulk of the stimulus that was used in the survey. At the start of the survey, and prior to being asked about the five key priority areas, customers were introduced to 11 key water services that SES Water considers when developing long-term investment plans. Descriptions were provided for each water service and customers are asked to rank their top 5 of what they believe are the most important or top priority for SES Water to consider. Following this, customers were taken through 5 different investment areas. They were provided with a description of the issue and the benefits and disbenefits of the associated investment. They were then asked a generic question around the specific area to test understanding and awareness, before being asked to state how important they believe investment in each area was. All 5 investment areas are shown together, without any financial implications, and customers asked to rank them in order of priority from their “most important” to invest in to their “least important”. Customers considered each of the 5 investment areas in turn. They were presented with a series of investment scenarios, with a description of the proposed investment and outcomes and the associated bill impact for the years 2030 and 2050, together with a total cost over the 25-year period. Customers were asked to select their preferred scenario and state why. Finally, customers were shown their selected scenarios together indicating a combined “bill” detailing the cost impact of their choices. Customers were asked to review the total bill impact, and to confirm their choices or make changes if preferred. The survey therefore followed a very logical approach and overall, it was very apt for the objectives trying to be achieved. Prior to the main survey, a set of cognitive interviews was undertaken to ensure the survey was appropriate for customers to complete. While the questions were understood, the presentation of the graphs showing the long-term bill profiles for each level of investment were not as clear as they could have been. As a result, the information was more clearly set out in a series of instructions to spell out exactly what each level investment meant. People who had taken part in the first round of cognitive interviews were re-contacted to check if the changes worked. There was unanimity from each person that the changes made the information clear and straightforward to understand.</p> <p>The qualitative playback groups comprised five areas of discussion i) To prepare customers for the focus group sessions, pre-reading introduced participants to SES Water, the regulators, business planning, the 11 key service areas and the 5 investment areas under consideration. No bill impacts or investment options were included at this stage. ii) Customers are introduced to long term planning and given the context of the session in terms of playback of survey findings. They are introduced to the key water services and complete the same prioritisation exercise. Customers are then shown the survey results including service performance to discuss. iii) Customers are reminded of the investment areas and complete the ranking exercise (prior to knowing any bill impacts). The investment area priority ranking results are then shared to discuss and influencing factors. iv) Customers consider 3 of the 5 investment areas in turn (Carbon Net Zero, Leakage, Smart Metering). They are presented with the same investment scenarios, including a description of the proposed investment and outcomes and the associated bill impact. Customer choices from the survey are shared and discussed. Perceptions and barriers to smart meters are also considered.</p>



	<p>v) Finally, customers consider the more general aspects of bill impacts, affordability and the current cost of living, and how these factors influence customer priorities and choices. Moderators also explored whether participants had been influenced by information and others' views shared within the session.</p> <p><b>Score - 5</b></p>
<p><b>Effectively reviewed and analysed</b></p>	<p>The purpose of the research was to understand customer views and priorities to inform long-term 25-year planning (LTDS) and AMP8 (2025-2030), In addition, the research was to test the level and pace of ambition in areas where there are genuine choices for customers across the next 25 years. As such, it was clear why the research was undertaken and had a high level of practical relevance. It focused on the key investment areas identified as where customer views may have a material impact. These were i) lead; ii) leakage; iii) smart metering; iv) net zero carbon; v) environmental enhancement Given that customer evidence was required to support our enhancement cases, the research was extremely relevant to the formation of our proposed business pan. The reasons and rationale for the research, as well as how it would help SES, were very clearly explained to customers.</p> <p>In terms of assurance, the survey materials were subject to two rounds of Board discussion before being circulated to CSP. Members of the CSP provided comments and potential changes to the survey, some of which were actioned, others which were not. Where the latter was the case, a clear explanation was provided as to why the changes were not implemented. This was all recorded and sent back to the CSP. Prior to the stage 2 qualitative research, interim findings from the quantitative research were presented to the SES water team, SES Water Executive Leadership Team (ELT) and SES Water's Customer Scrutiny Panel (CSP). This enabled customer views and preferences to be used to inform and support ongoing development of the long-term strategy and PR24 business plan. Feedback from comprehensive discussions with the ELT and CSP identified those findings that warranted further exploration with customers during the qualitative playback research and were used to confirm the stage 2 research objectives. As such, the qualitative research was also subject to CSP assurance and validation, where it signed off on the both the topic guide and stimulus before being put in front of customers</p> <p><b>Score - 4</b></p>
<p><b>Contribution to the plan</b></p>	<p>As part of its ongoing research programme, we will be collecting evidence on how we are performing against each of these customer priorities. Given that these issues are part of our PR24 enhancement claims, it will be very important for us to monitor our performance in these areas. Furthermore, because each of these areas are critical to our LTDS, we will be carrying out research into each on a continua and ongoing basis, especially to support any adaptive planning that is required.</p> <p>The research findings have been shared widely amongst Board. management and other stakeholders including the CSP, and the results have been fully published on the website. As well as the main findings, the report will also include as relevant: recruitment screeners, discussion guides, questionnaires and stimulus material; these will form part of the appendices.</p> <p><b>Score - 5</b></p>



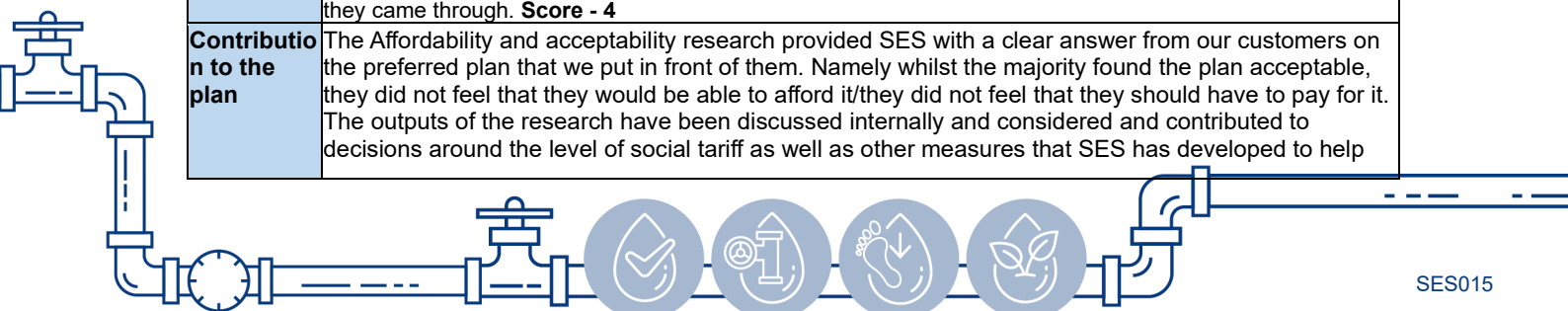
<b>Overall assessment</b>	<b>19 - Excellent quality research</b>

<b>Engagement Stream</b>	PR7 - Social tariff research
<b>Representative &amp; inclusivity</b>	<p>To inform SES Water’s social tariff policy, it undertook a large <b>quantitative</b> survey and a small follow up <b>qualitative</b> phase. The former comprised 869 interviews with 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 &amp; disability 36% and 21% with a meter. These splits indicate a high degree of inclusivity. Not only that, but excellent profiling information was gathered in terms of HH income and annual water bills, household composition and, whether participants were in receipt of some form of benefit - 34% were in receipt of some form of benefit. From a sample of 42,000, 869 interviews were achieved – a response rate of 2%.</p> <p>The qualitative element consisted of five follow up depth interviews with people who had taken part in the survey. Essentially, they were case studies to explore in much more depth why they were willing or unwilling to pay a bit more towards a social tariff. These five interviews were split approximately 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.</p> <p>The research was designed independently by DJS Research who are well known to Ofwat and CCWater, and who have undertaken social tariff research for several water companies at PR24. They applied their learnings and expertise to ensure an impartial design of the various research materials (stimulus, questionnaire and topic guide). Consequently, this resulted in an unbiased research study which all parties can have confidence in.</p> <p>As with the other quantitative research, there was an under representation of younger people. While the total sample matches well with the local profile in terms of gender, SEG and Local Authority area, the age profile shows a deviation from the local profile as such this has been corrected through weighting.</p> <p>Score - 5</p>
<b>Robustly gathered and undertaken</b>	<p>The project followed a tried and tested route of firstly quantifying people views about social tariffs before exploring in more depth why participants gave the responses they provided in the survey. As no exploratory information was required on the design of the survey of the social tariff, a prior qualitative stage was not required. The research was more about people's awareness of social tariffs, how confident they were in being able to pay their bills, and whether they received any financial support or various benefits to help pay their bills. The survey also asked about people thought about contributing extra towards cross subsidies, and specifically how acceptable it is to help those struggling to pay their water bills, it was and how much. A contingent valuation approach was utilised to understand the amount people were willing to pay on top of their current bill to contribute towards a social tariff. Prior to launching the main survey, a soft launch was carried out to make sure the survey was fit for purpose and that all the routing worked. Interviews lasted 11½ minutes on average, and respondents were shown several pieces of stimulus during the interview to provide information relating to the proposed social tariff and other elements of SES Water’s existing programmes and schemes to support customers.</p> <p>The follow up depth interviews provided more depth and colour to individual cases who took part in the survey. Here, people were asked in detail about the concept of social tariffs, why, or why not they support them, and a more detailed explanation about the reasons for the extra amount they would be willing to contribute. To provide some added context, people were also asked about their service experience and perceptions of value for money.</p> <p>Due to the design of the research, the clarity of the questions being asked and the stimulus that was provided, participants were clear what they were asked to answer and provide views on. Overall, the process was quite rigorous and allowed participants to engage in balanced discussions. And answers. As such, the research met the objectives it set out to achieve and was fit for purpose.</p> <p>Score - 5</p>



<b>Effectively reviewed and analysed</b>	<p>Ofwat's PR24 guidance on social tariffs stated that there was a requirement on water companies who had not undertaken any customer research on social tariffs in the last three years to do so. This research therefore has a high practical relevance</p> <p>The research sought to understand 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 part of their bill to support this. These objectives make it clear as to why the research was undertaken, so participants were clear as to the rationale for the research. Furthermore, the project contextualised the research considering all water companies providing social tariffs so that it was clear that it was not just an SES Water initiative.</p> <p>The outputs from the social tariff engagement will be used to inform the ongoing development and implementation of its policy, specifically in terms of how much to increase the contribution from ineligible customers.</p> <p>The research went through several assurance stages. First, CCWater (central office) was sent the proposal for comment. The approach recommended was approved by CCWater and the CSP. Once approved, the questionnaire was sent to the CSP for comments and edits; the changes it suggested were taken on board as such, the project went through a thorough and independent assurance process.</p> <p><b>Score - 4</b></p>
<b>Contribution to the plan</b>	<p>As part of the VoC research, SES Water already collects information about its Priority Service Register (PSR), and particularly about the awareness and helpfulness of the services provided by SES Water to people in vulnerable circumstances. Awareness of the social tariff is included as a specific question as part of this suite of questions. However, there is definitely scope for us to track attitudes more widely towards the social tariff, as well as how the policy could be adapted on a more continual basis, as both societal and individual circumstances change.</p> <p>As well as the main findings, the report will also include as relevant: recruitment screeners, discussion guides, questionnaires and stimulus material; these will form part of the appendices.</p> <p>The research has been widely shared both internally and with the CSP. The report along with all the material have also been published on the website</p> <p><b>Score - 4</b></p>
<b>Overall assessment</b>	<p><b>18 - Excellent quality research</b></p>

<b>Engagement Stream</b>	<p>PR8 - Affordability &amp; Acceptability Testing</p>
<b>Representative &amp; inclusivity</b>	<p>Both elements of the Qual and Quant research were conducted in accordance with the guidance set out by Ofwat. Qualitative</p> <p>Quantitative – In total, 506 surveys were completed in total, 504 online and 2 by post. 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%. While quotas were not set on vulnerability, there was good coverage of different types of vulnerability: Medical 23%; Communications – 47%; Life stage – 15%; Other – 4%</p> <p><b>Score - 4</b></p>
<b>Robustly gathered and undertaken</b>	<p>Qual No issues faced with recruitment, no concerns it wasn't legitimate research or a scam Prior to the survey taking place a small set of cognitive interviews were carried to ensure the survey was fit for purpose and that people understood what was being asked of them. 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.</p> <p><b>Score - 4</b></p>
<b>Effectively reviewed and analysed</b>	<p>Ofwat's guidance on the affordability and acceptability was followed not only in the way in which the survey was set up but also in the outputs and analysis which was conducted after. The prescribed question set allowed SES to complete the SUP14 table in the data table which focused on the outputs of the Affordability and Acceptability testing, and this was also shared with key wastewater provider in our area Thames Water. The CSP and ESP were involved throughout the set-up process and were kept informed of the outputs once they came through. <b>Score - 4</b></p>
<b>Contribution to the plan</b>	<p>The Affordability and acceptability research provided SES with a clear answer from our customers on the preferred plan that we put in front of them. Namely whilst the majority found the plan acceptable, they did not feel that they would be able to afford it/they did not feel that they should have to pay for it. The outputs of the research have been discussed internally and considered and contributed to decisions around the level of social tariff as well as other measures that SES has developed to help</p>



	customers lower their bills. The research has been shared with the other SE water companies and has also been published in full onto the website. <b>Score - 4</b>
<b>Overall assessment</b>	<b>16 - Good quality research</b>

<b>Engagement Stream</b>	PR9 - Small company premium
<b>Representative &amp; inclusivity</b>	<p>To understand whether there is a case for SES Water to receive a 'Small Company Premium' (SCP) to help finance its operations, it carried out a customer research programme of qualitative and quantitative research, in that order. The <b>qualitative</b> comprised 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. The skew towards ABC1 means that this stage of the research was not very inclusive. Also, the three groups had strange age ranges - one was 25-74, one was 35-54 and the other was 25-64. The rationale is unclear for these groupings and as such there is little opportunity to differentiate by age.</p> <p>In total, 922 interviews were carried out, 849 online and 73 on street. The <b>survey</b> achieved quite similar representation to the customer priorities, choices &amp; outcomes survey. Gender: male - 46%, female - 54%; Age - 18-34 15%; 35-64 55%; 65+ 30%; SEG - ABC1 62%, C2DE 38%; Location - Surrey 55%; London 44%. These proportions are representative of our customer base at a high level. However, the classification questions in the survey did not include any information about income levels, physical/mental issues, ethnicity and household composition, this is a missed opportunity to obtain viewpoints from people in a range of different circumstances, so again, one has to question the inclusivity of the sample.</p> <p>Due to the complexity of the subject, appropriate content and topic coverage were provided to Explain, the research agency. Explain then implemented the research independently to ensure a neutral design and avoid any misleading of participants.</p> <p>In terms of reporting, it is good that the under representation of age has been mitigated by weighting the results. Neither was there any bias in the reporting as the findings set out balanced views from a variety of perspectives.</p> <p>Score - 3</p>
<b>Robustly gathered and undertaken</b>	<p>Following internal discussions, a decision was made to see if there was any customer support for an SCP. We understood from Ofwat's guidance that any evidence had to be supported by customers' own words and that there needed to be a robust validation of the results. A two phased programme of work was embarked upon - the qualitative phase was to ensure we met Ofwat's requirement of eliciting customer definitions and wording; and the quantitative phase was to ensure the results were robust.</p> <p>The qualitative phase was conducted online using a range of stimuli including the average HH bill, the daily breakdown of the bill, information about the cost of borrowing, SES's proposed investment plans for 2025-30 and the potential impacts. A discussion guide was developed in conjunction with SES Water which ensured all the pertinent issues were covered. The findings from the qualitative phase alone provided some meaningful information for SES, However, one of the key objectives of this phase was to inform the design and wording of the follow up questionnaire. This approach ensured that customers' own words were used, thus avoiding any criticism of not applying Ofwat's criteria for carrying out the research, and ensuring it was robustly undertaken.</p> <p>The survey included a range of questions including the following: spontaneous perceptions of SES Water (satisfaction &amp; value for money); perceptions about our performance compared to the industry; the pros and cons of being a small water company; Likert agreement scales for various advantages and disadvantages of being a small company; willingness to pay an extra small amount for being a small company, and if so, how much. The survey was distributed to 24,478 SES Water customers via email, with the aim of achieving 700 responses; (we achieved 849 completes) In addition, 73 on street interviews were undertaken to include digitally excluded customers in the completion of the survey. Prior to launching the main survey, a soft launch was undertaken, to ensure there would be no glitches in terms of data collection.</p> <p>In both phases of research, there was good context as to why the work was taking place. And the explanatory text in the survey, whether regarding comparative industry data or the concept of a small company premium helped people to understand and be clear what the research was about and what questions they were being asked to answer.</p> <p>Score - 4</p>



<p><b>Effectively reviewed and analysed</b></p>	<p>As part of its PR24 business plan SES Water wishes to pursue what is known as an SCP. which enables smaller water companies to request company specific uplifts (e.g., to the allowed return on debt). SES Water is required to demonstrate it has customer support for any financial adjustments to the assumptions Ofwat have provided in its Final Methodology. 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</p> <p>These objectives were clear to participants as was the rationale for undertaking it. It was also made clear to people that this was only relevant to small companies, and so that extra context was provided. Given the objectives of the research and SES Water's desire reduce the financial burden to customers, it is highly relevant and practicable as part of the business planning process.</p> <p>It was critical that the inputs to the research were right in terms of potential bill impacts. The board was therefore closely involved to ensure that the final amount was correct, thus providing high levels of assurance at the beginning. The CSP was involved at all stages of the research and provided further assurance about the process.</p> <p>Score - 4</p>
<p><b>Contribution to the plan</b></p>	<p>The SCP is only something that Ofwat allows as part of its final determination of business plans. As such, research is usually only carried out by potential recipient companies every five years. However, to lessen the pressure on SES Water doing future SCP research at quinquennial intervals, we suggest gathering relevant evidence on a continual basis throughout the AMP. This will enable us to have a more meaningful discussion earlier in the business planning process as to how we move forward with an SCP.</p> <p>Notwithstanding, this research has provided the required evidence for SES Water to request an SCP as part of its business pan submission</p> <p>The results of the research have been shared with, and reviewed by SES management, as well as the CSP. The report and all the appendices (recruitment screeners, questionnaire, topic guide and stimulus) have all been shared on the website.</p> <p>Score - 4</p>
<p><b>Overall assessment</b></p>	<p><b>15 - Good quality research</b></p>

