Listen, Learn, Inform: Interim Debrief
Limited Prior Knowledge

Accent is registered to the market, opinion and social research
International Standard ISO 20252
This presentation is based upon qualitative data and should not be considered robust, but indicative of the views of the populations targeted.
1 Research Background
SES Water have begun a comprehensive research programme for PR19

First phase of research is to Listen, Learn and Inform

**PR19 Research Plan**

- **Listen, Learn, Inform**
  - Explore baseline perceptions of SESW and how these may change after full exploration of the business plan

- **Test and Review**
  - Understand stakeholder needs and priorities for service delivery both now and over the longer term (prompted and unprompted)

- **Seeing the Full Picture**
  - Assess whether stakeholders understand the proposed business plan and what impact it may have on their world

SESW recognises the need to deliver a sound and comprehensive research programme for evaluation by OFWAT and the CSP
Programme needs to cover diverse range of stakeholders

Mixed qualitative methodology designed to cover all stakeholders

Key Stakeholders

- Limited prior knowledge
  - Interested
  - Expert

- Limited Prior Knowledge
  - 2 x F2F depths Helping Hand
  - 2 x F2F depths Disability
  - 2 x F2F depths High water need
  - 2 x F2F depths Hard to Pay
  - 2 x F2F depths Over 75

- Online panel with 25 consumer and 25 business

- Interested
  - 1 x town hall event
  - 1 x employee workshop
  - 1 x students

- Expert
  - 8 x telephone depths with experts e.g. regulators, environmental/charitable organisations, investors

This slide pack provides insight from those with limited prior knowledge including Future Bill Payers (Students)
Methodology and Sample

Qualitative methodology comprising 11 pre-tasked extended discussion groups and 10 depth interviews

<table>
<thead>
<tr>
<th>Group</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
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<tr>
<td>SEG</td>
<td>ABC1</td>
<td>Mix of SIC</td>
<td>C2DE</td>
<td>ABC1</td>
<td>C2DE</td>
<td>NHH</td>
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<td>C2DE</td>
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<tr>
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<td>65+</td>
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<td>45-65</td>
<td>18-35</td>
<td>18-25</td>
<td></td>
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<tr>
<td>Location</td>
<td>Sutton</td>
<td>Leatherhead</td>
<td>Dorking</td>
<td>Purley</td>
<td>Caterham</td>
<td>Horley</td>
<td>Redhill</td>
<td></td>
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</tbody>
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10 x In-Home depth interviews with Vulnerable customers

All fieldwork undertaken between 19th April and 8th May
Pre-task designed to ensure conscious response to water to enable articulation of spontaneous priorities

**Five parts to pre-task**

- Postcard to SES Water
- Water moments diary
- Water deprivation exercises
- Video selfie – Without water....
- Dig out your bill

App based and paper based pre-task option
Sample Observations
Range of business customers in the sample

Mix of higher and lower water dependency

- Beauty Salon
- Café
- Catering Manager
- Marine Engineering
- Cycle shop
- Music producer
- Newsagent
- Drs surgery
- Minicab office
- Estate agents
- Charity

Higher water dependency = washing hair, pedicures, food preparation, cleaning engines, repairing bikes

Lower water dependency = washing floor/cleaning offices, washing machines, tea/coffee, drinking water, flushing

No evidence of water recycling – 2 x HD businesses using water substitutes for cleaning
Lots of challenges exist for small/medium Business customers

- Brexit
- Weather
- Squeezed margins (Cost increases)
- Securing stock
- Financial management
- Competition – online, large company power e.g. Uber, Halfords

Grateful that they don’t have to think too much about water service provider

Most of out suppliers buy in Euros so it’s a 20% increase
Leatherhead, Business

My broadband's just going up, telephone line's going up, the cost of produce…everyone you talk to it's, 'Prices are increasing.'
Purley, Business
Low awareness of Open Water

Some recollection of re-branding letter – not sure whether this was related to Open Water

- Little attention paid to water
- Water is lowest utility cost
- Some recall of a letter that offered an incentive - £30 to stay with SES Water
- Easier to stay with SES Water
  - No issues or complaints
  - No concerns re high cost
  - One Bill/online
  - Unsure of advantage to switch
- Separation of retail and wholesale feels confusing so easier not to engage

I think the electric is different. I pay 550 a month and I just think, oh my God. I really need to get that down. But paying £84 a month, to me I've got other priorities.

Purley, Business

I do remember getting a letter saying about SES Water rebrand and I got 30 for staying. I don’t think we had to do anything.

Leatherhead, Business

None of the businesses in the sample had (or considered) switching atm
Dear Friend in Scotland,

I'm writing to you to let you know about this company we have here- SES. They deal with our water billing for our company- both clean and waste water. One billing firm this has changed recently but I find the One bill clearer & less hassle. They also have E-billing so you can view bills online and actually people you can talk to on the phone (not robots). I don't know who you're with Archer & Murray- HSE office of Scotland but from using SES I've found I've saved money, the customer service is great and it might be worth giving SES a phone and seeing how they can help you.

Kind regards
Lucinda T

Dear friend in Scotland

I am writing to you in regards to Sutton and south east water. They are a company that supply my business with water and I have had no problem whatsoever whilst using them. They seem like a very trustworthy company and if you would ever be presented with a chance to use them I would recommend it. How's the weather up there.

Regards
R Patel
Regardless of business or household status, not all customers have the same attitude to water.

<table>
<thead>
<tr>
<th>Cost conscious</th>
<th>Water conscious</th>
<th>Water blind</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware of what they are using</td>
<td>Aware of what they are using</td>
<td>Unaware of what they are using</td>
</tr>
<tr>
<td>Thoughtful about water usage</td>
<td>Thoughtful about water usage</td>
<td>Never thought about water</td>
</tr>
<tr>
<td>Metered</td>
<td>Some metered/some not</td>
<td>Driven by cost and non-cost factors</td>
</tr>
<tr>
<td>Driven by cost</td>
<td>Driven by non-cost factors</td>
<td>Cost = Managing financially, lowest utility cost</td>
</tr>
<tr>
<td></td>
<td>Environment</td>
<td>Non-Cost = Good product, no complaints, good service, why should I think about it</td>
</tr>
<tr>
<td></td>
<td>Dislike waste</td>
<td></td>
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</tbody>
</table>

Already using water saving strategies e.g. half filling kettle, dishwater for the garden

Begin to see emerging segments – Keen Greens, Martin Lewis brigade, UWIL, In a bubble
Future customer group are present tense and demanding

- Commonality is speed of response
- Modern and fresh approach to business
- Customer is at the centre of everything
- Dedicated team to respond to communications and complaints on social media
- High social conscience – expect SESW to have CSR policy
- Present as more environmentally engaged than general audience

Development of technology is critical take out and tone of communications for future audience

Demand high service from companies

Require instant feedback and really help highlight gaps in SES Water service delivery
Vulnerable customers recruited to represent a range of vulnerabilities

Financial Vulnerability
- Currently struggling to pay or at risk
- Overlap of vulnerabilities
- Hard to pay, helping hand also had other vulnerabilities e.g. high water need, medical issues
- Chaotic households
- Struggling to pay all bills
- Not sure where to start

Non-financial vulnerability
- Organised households
- Financial stable and managing
- Age = coping well and sprightly; sight issues (old school approach to finances)
- High water need = severe skin condition, incontinence

Overall priorities mirror core customer base BUT specific initiatives e.g. community representatives, sharing data also emerge, large bills, promotion of tailored tariffs
Case Study: Vulnerable customer with multiple needs

Not all in SES Water area are typical ‘vulnerable customers’

Background
- Large family
- Wheelchair user in household
- Children
- Financially secure
- Higher water use (laundry, incontinence, bathing)

Priorities
- Consistency of water supply
- Proactive support from SES Water
- Smart meter to control usage
- Priority register
- Education and community engagement e.g. local schools

Proactive customer who will approach SES Water for help when required
3 Perceptions of SES Water
Very positive response towards SES Water across groups

In a very busy ‘global’ world, having a reliable, local service provider with a social conscience is welcomed

Specifics
- User friendly website
- Easy moving house process
- Clear bills (vs. energy)
- Good communications e.g. little booklet that ‘looks like they are trying to help the community’
- Proactive when customer overpaid
- Speedy to deal with a leak
- Local call centre
- Quick to answer the phone
- Free stuff
- School visits

No comparative company or organisation – everyday ‘invisibility’ of SES Water is a good thing; other utilities standout for wrong reasons
More on the SES Water website

Look and feel and content of website felt to be effective

Content
- Informative
- Leak / service interruptions
- Planned interruptions
- Calculators
- Detail on community projects

Look and Feel
- Easy to use/intuitive
- Pictorial
- Large font

They go round giving free talks and you’re told how you could book a free talk for your school on the website as well.

Caterham, ABC1, 65+

Surprisingly good – more information on the website than expected
Postcards reinforce how straightforward customers find SES Water

General consensus that SES Water are better than other service providers e.g. energy, broadband – not as much goes wrong and when it does, it is dealt with swiftly
Minority of negative product and service related stories

Product Related
- Few stories relating to water quality
- Hard water - Impact on products e.g. limescale build up and £ of replacing appliances
- Chalky water – Impact on £ e.g. need to buy bottled water

Service Related
- Few stories where SES Water are inefficient and less slick
- Request for water meter ignored
- Slow to deal with moving house request
- Response to Open Water letter
- Confusion over ‘making good’ of repairs

Dear friend

Our local water supplier is SES Water. They supply us with good tasting water, I am never tempted to buy bottled water for home. I have travelled a great deal around the country and around the world and it's always nice to return home where I know the water will taste the way I like it. If I had to make a constructive comment, I would prefer softer water as I am forced to use Caigón in my washing machine to stop the deposits. However, this is a small price to pay for the quality we get. We had a nearby water main burst last year but they sorted it quickly so that was good. No one likes to pay more for anything but I feel overall we get good value for money.

Best wishes
Clive.

Well it does affect me because I have to run it for so long before I get clear water. And also I have to buy a lot of bottled water and I have a filter, so it really does affect me Purley, HH, 65+

Many addressing hard water issues with water softeners, filters but welcome any advice from SES Water to achieve optimum experience
Most had noticed the change in SES Water brand/logo

- Shift in logo has been well noticed
- Letter seems to have achieved cut through
- Look and feel = highly positive
- Acronym vs. Name = trendy and modern AND more practical
- Demonstrates investment in the brand
- Rationale for brand shift is less clear
  - Modernising vs. SES Water expanding/losing local focus

Consensus = positive change creating a more modern and progressive brand

They've recently rebranded so you might not recognize them but they're called SES water now and they have contemporary new logo which I really like!
Horley, ABC1, 18-35

I said a logo was better because it’s SES and not Sutton and you know, such a long mouthful
Purley, C2DE, 65+

Some fear that SES Water are losing their local USP
Maintaining ‘local’ story is important for existing customers

SES Water seen as a small company serving local communities

- Involvement in the community is welcomed
- Customers suggestions for further involvement:
  - Supporting local recreational areas e.g. Bough Beech Reservoir
  - Resources for local schools
  - Promoting health benefits of water e.g. providing schools with SES Water drinking bottles
  - Local community officers to support those in vulnerable situations e.g. recommending tariffs
  - Working with deprived communities

Note – Under 30s limited connection with old Sutton & East Surrey brand world

Need to continue to emphasise ‘local’ in all SES Water communications
4 Water Moments
Water moments exercise uncovers the emotional value of water and multi-sensory experience vs. more obvious functional usage.

Recognised as the most essential and important service in the household

Whole tapestry of emotions to reflect in comms to build stronger brand connection.
Water discolouration significant issue for majority of water moments

Strong negative emotion associated with discoloured water; fills many with disgust

Would use discoloured water

Would not use discoloured water

No understanding that discoloured water = safe to use; even when they know this, customers still very uncomfortable
Water pressure is not considered to be a key problem

Unlikely to impact on any of these water moments – although things would take longer

No perceived impact of low water pressure but no long term affected customers in the sample
Extreme negative emotions associated with deprivation tasks

Desperation, Agitated, Moody, Snappy, Tired, Anger, Fear, Frustrated, Embarrassed, Stress, Discomfort, Lethargic, Loss of earnings
Water moments observations

Regardless of original water attitude and behaviour, water moments exercise challenged customers ‘take it for granted’ approach to water

Waste conscious

- Older households
- Metered customers
- ‘War mentality’
- Aware that water is a precious resource
- Exercise reinforced current attitude and behaviour

Waste oblivious

- Tended to be younger households (pre-family)
- Conscious of sell by/use before dates
- Bottled water better than tap water
- Some state behavioural change as a result of exercise but still there is a segment – Use what I want, when I want - who will revert back to ordinary behaviour

Potential to think about using this ‘game’ as part of app development
Priorities and Promises
Spontaneous priorities consistent across sample

Some priorities are hygiene factors whereas others will surprise and delight

- Water softening advice/devices
- SES Water app
- Smart meters
- School education visits/materials
- Free efficiency devices
- Water saving advice
- Local customer service centre
- Environment
- Invest in infrastructure Leaks/pipe maintenance
- Fair tariffs
- Water supply resilience
- Water quality

Brilliant Basics and Blow me Away Factors still relevant in the future scenario
Brilliant Basics are the hygiene factors that people simply expect

For SES Water, the Brilliant Basics that customers expect NOW seem to be being delivered

However, some sense that leak management could be improved

Limited information on infrastructure investment and environmental policy

- Local customer service centre
- Fair tariffs
- Environment
- Invest in infrastructure Leaks/pipe maintenance
- Water supply resilience
- Water quality
Brilliant Basics: Water Quality

Water quality is good but addressing the hard/chalky water would be a basic service improvement

Overall most are happy with the water quality and accept they are in a ‘hard water area’. It tastes good, is pure and clear water. Minority have issues with discoloured/chalky water

<table>
<thead>
<tr>
<th>Overall water quality</th>
<th>99.95%</th>
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<tbody>
<tr>
<td>Target: 100%</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Taste, odour and discolouration contacts</th>
<th>419 contacts</th>
</tr>
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<tbody>
<tr>
<td>Target: 350 contacts</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>Water softening</th>
<th>Delivery on schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target: Deliver programme</td>
<td></td>
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</tbody>
</table>

High target and high performance
100% target impossible to achieve
Nobody wants poor tasting, discoloured water
BUT 419 contacts out of 688k people feels good
Interesting
What does this mean?

I’ve noticed they’ve got water softening down here but how do we know whether it had been softened or not?
Caterham, ABC1, 65+

Important to understand how water quality could be improved to feed into next stage
Brilliant Basics: Continuous Supply

No issues with current water supply but spotlight on potential droughts raises importance of resilient supply

- Short and long term resilience necessary
- Noticeable population growth across the region that will impact on demand e.g. Horley developments, Sutton = no 1 place from London
- Media coverage of lack of 2016 rainfall means concerns raised over supply
- Customers need assurance of supply (now/future)

<table>
<thead>
<tr>
<th>Supply interruptions over 3 hours</th>
<th>6.3 minutes</th>
<th>Target: 15.6 minutes</th>
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<tbody>
<tr>
<td>Number of bursts</td>
<td>212 bursts</td>
<td>Target: 290 bursts</td>
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<tr>
<td>Security of supply index</td>
<td>100%</td>
<td>Target: 100%</td>
</tr>
</tbody>
</table>

Targets look acceptable
Not sure how these are derived but reduction of burst pipes is important
Pre-notification of supply interruptions requested (some say they have had these)
Regular text updates requested

Strong sense that responsibility of continued supply is with SES Water; many customers not conscious of what they can do personally to control demand
**Brilliant Basics: Infrastructure**

Investment in infrastructure is a hygiene factor – customers expect SES Water to be protecting and investing in their assets

- Expectations heavily interlinked with Continuous Supply
- Short and long term resilience necessary
- Protecting current resources through management and investment of the current assets is critical
- Proactive replacement of old lead pipes
- Future focused response to environmental concerns e.g. will we run out?
- Impact of terrorist threats

<table>
<thead>
<tr>
<th>MEASURES</th>
<th>PERFORMANCE IN 2016</th>
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<tbody>
<tr>
<td>Water restrictions</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Target: 0</td>
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<tr>
<td>Building a more resilient network</td>
<td>36%</td>
</tr>
<tr>
<td></td>
<td>Target: 36%</td>
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</table>

Targets look acceptable

- Zero water restrictions is excellent
- Perception that we still have ‘enough rain’
- Building a more resilient network is imperative but % in context of this quick review were meaningless

Whilst environmental concerns (pollution, etc) didn’t come up repeatedly, resilience to the impact of climate change is a concern for many.
Focus on climate change (future impact) and managing rivers (present impact) but not everyone buys into ‘the environment’

Environmentally disengaged (Future)
- Focus on own world
- Present tense
- Not sure what to believe
- Exhausted with debates
- Not interested

Environmentally engaged (Future and Present)
- Future focused and aware of environmental issues
- Read about climate change and are concerned
- Trying to keep the message alive
- Interested in supporting positive environmental change

I’ve got too much ‘environment’ in my life. Dorking, ABC1, 35-65

It’s something that’s still stuck with me and then I just teach that to my kids. Dorking, ABC1, 35-65

Even those who choose to ignore climate change impact tend to support protection of wildlife/rivers
Brilliant Basics: Environment

Real concerns about the leakage target

<table>
<thead>
<tr>
<th>Aim 5</th>
<th>Reduce our impact on the environment while seeking to make a positive contribution to its quality</th>
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<tbody>
<tr>
<td><strong>MEASURES</strong></td>
<td><strong>PERFORMANCE IN 2016</strong></td>
</tr>
<tr>
<td>Leakage (millions of litres per day)</td>
<td>24.17</td>
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<tr>
<td>Environmental education programme</td>
<td>13,314 people</td>
</tr>
<tr>
<td>Customer usage reductions through metering</td>
<td>160.9 litres per person per day</td>
</tr>
<tr>
<td>Greenhouse gas emissions (kgCO2e/MJ)</td>
<td>470</td>
</tr>
<tr>
<td>Severe pollution incidents</td>
<td>2 incidents</td>
</tr>
</tbody>
</table>

Environmental education programme is positive

- Leakage target is unacceptable
- Lack of comprehension of industry leakage standards
- Impossible to imagine that much water being wasted
- Creates resentment about customer usage behaviour
- Severe pollution incident feels unacceptable – why/what is the cause of this?

Need to be explicit about in-home leakage contribution and have a solution e.g. explain how this can be minimalised via smart meters
Brilliant Basics: Fair Tariffs

Pre-task exercise elevated awareness of bill but limited prior knowledge beyond 'low cost'

- Current perceptions of VFM are good and bills are fair
- No easy way of determining VFM/fairness
  - No comparison for HH / Business customers haven’t tried
- Generally VFM ‘what is paid for service/product delivered’ is good
  - Positive service/product experience (maj.)/lowest cost
- Where product quality is a concern (Chalky), VFM is diluted e.g. cost of buying bottled water factored in

Sense of duty for SES Water to promote better tariffs to those who may benefit e.g. singles/young couple AND to encourage smarter water usage
Discussion uncovers variety in bills and debate over social tariff justification

Not everyone supports the social tariff

Concerns about qualification criteria inflamed by media coverage of benefit fraud, etc

So target of 5,000 on social tariffs gets mixed response

Some vulnerable customers unaware of opportunity to be on this
  - Young family
  - 2 small children one with autism
  - Mum diagnosed with weeping skin condition
  - Financially challenging as difficult to work

<table>
<thead>
<tr>
<th>MEASURES</th>
<th>PERFORMANCE IN 2016</th>
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</thead>
<tbody>
<tr>
<td>Customers on our Water Support tariff</td>
<td>5,686</td>
</tr>
<tr>
<td></td>
<td>Target: 5,000</td>
</tr>
<tr>
<td>Perception of value for money</td>
<td>9.0%</td>
</tr>
<tr>
<td></td>
<td>Target: Less than 15% of customers dissatisfied</td>
</tr>
<tr>
<td>Bad debt as a percentage of turnover</td>
<td>0.75%</td>
</tr>
<tr>
<td></td>
<td>Target: Less than 1% of turnover</td>
</tr>
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</table>
Postcards reinforce sense of good value

Hello my friend,

I hope you are well. I wanted to tell you about our water supply company, SES, who we do take for granted and are fortunate to have such a service. It’s amazing to be able to turn on our taps at any time and get fresh drinking water that is clear to drink. I am on a water meter, which is something you pay for what you are using, so it's good but over the past year the monthly bill is creeping up, but I think that's life in general! Their service is good, I did have a leak a few months back and all ways resolved quickly, so I have no complaints! If SES move your way, be sure to give them a try!

Name: Kellie
Gender: Female
Email: r_kellie@hotmail.com
Segment: Group 6

Dear friend in Scotland,

I’ve finally got five minutes to myself having finally unpacked and settled into our new flat. I hate moving but we’re all sorted now, even got all our bills up and running! The easiest one was our water bill. We rang them up, gave our names and address and everything was dealt with for us right away! They’ve recently rebranded so you might not recognize them but they’re called SES water now and they have contemporary new logo which I really like! I can manage my bills online, go paperless with my statements so I don’t get any pointless post and they even collect my wastewater charge on behalf of Thames water! Plus they’re really cheap at only £33 a month. Couldn’t be happier!

Hope to see you soon
Justine
Brilliant Basics: Local Customer service centre

Maintaining current local customer service centre is expected

- Majority of customers have no experience of contacting SES Water
- They see this as a positive thing (HH and Business) – one less thing to worry about
- Very surprised that only 265 employees
- Those who have contacted the call centre tend to tell positive stories
  - Straight through to a human
  - No transferring from pillar to post
  - Efficient
  - Happy to call back
  - Explain about other tariffs

Overall customer satisfaction target is being met

BUT 89% satisfaction feels like SES Water lack ambition

Concern that they are seen as ‘below industry average’ although no understanding of how that is measured

Number of complaints target feels challenging – less than .5% of properties

Pushing customer service beyond ordinary call centre delivery begins to delight
‘Blow me away’ priorities are unexpected initiatives that can surprise and delight

For SES Water, the Blow me away factors are very current - some of these SES Water are already doing and they are delighting some customers who happen to have seen/heard about them

Others should be being developed NOW to fit with the vision of being a BRILLIANT company

- SES Water app
- Smart meters
- School education visits/materials
- Water softening advice/devices
- Free efficiency devices
- Water saving advice
Blow me away: Context
Future bill payers visualise future home

Smart homes becoming more mainstream and SES Water need to keep up

**Food management** – SMART fridge, OCADO (orders, recommends)

**Energy management** – HIVE, NEST (remote heating/lighting)

**Infotainment management** – SONOS, ALEXA, ECHO. SKY Q (entertains, advises, records)

**Security management** – VARIOUS (remote locks, alarms, lighting, deliveries)

**Device management** (wireless charging/data transfer)

Surprise that there was no technology aim/promise – need to be pushing boundaries and help customers understand what the future SES Water home will look like
Blow me away: SES Water app and Smart Meters

Practical and emotional benefits of the smart home - things that make life smoother and reduce everyday stress are valued

- Look/monitor bills
- Suggest tips to save water
- Reward behaviour
- Best day of saving water that week
- Facts about SES Water
- Log complaints
- Live chat
- Supply interruptions
- Alerts when using too much (set targets)

Benefits = £ saving, environmental, reduce hassle, safety, save time

Although not all will want to switch to a smart meter, SES Water perceived to be falling behind other utility providers

I think an app should be mandatory
Redhill, Future Bill Payers
Blow me away: school education/materials

Seen be everyone as a valuable community project

- Mixed awareness of this SES Water community project
- Some children/grandchildren had experienced visits/talks
- Others had looked on website and seen this how this initiative currently works
- Overall seen as positive way of engaging with the community
- Children = high emotional value
- Educating future generations
- Promoting health benefits of water (branded SES Water bottles)

I think it would probably be quite educational for kids to be able to see how it’s purified and test for chalk levels etc. Caterham, C2DE, 30-55

Potential to include within promises to demonstrate community commitment – more support for schools than local charities which seem a bit polarising
Blow me away: advice/device

Appetite to reduce usage esp. in future metered world but need support from SES Water

Advice
■ Water efficiency advice = good
■ Fairly easy suggestion though – no guaranteed action, talk is cheap
■ Looking for:
  • Water efficiency packs
  • Neighbour comparisons
  • Water calculators

Device
■ Devices are more sexy
■ Free stuff = something for nothing
■ Feels more tangible
  • Push taps
  • Shower heads
  • Hippos
■ Water softeners/filters also welcomed

I would thoroughly recommend them as a service provider. I would however be keen to learn more in terms of my water usage and what I could do to conserve water HH, Sutton, 50+

Three pronged strategy for water saving suggested to ensure action – advice, device and an app that’s nice (app helps keep the action top of mind e.g. fitbit)
Innovation and future priorities reflect need for sustainability

Long term priorities tend to focus on innovation for supply side initiatives
Dome demand management with expectation of smart meters for all

Water sharing
New ways for sourcing water
e.g. Desalination
Best practice (UK/overseas)
Storage/collection

Recycling water
Reward tariffs

Sponsorship
Brand awareness
Packaged Utilities

Supply
Demand
Brand