PR24 Enhancement Packages

Full report

September 2022

Report by BritainThinks

Contents

- Executive summary
- Background and methodology
- Future challenges, improvements and raising the bar
- Deep dive: Enhancements
- Assessing enhancement packages
- Meeting Ofwat's minimum standards
- Appendix – Research materials

Executive summary

Executive summary of research findings (1/3)

There are two key factors that should be noted in terms of how customers approached this research:

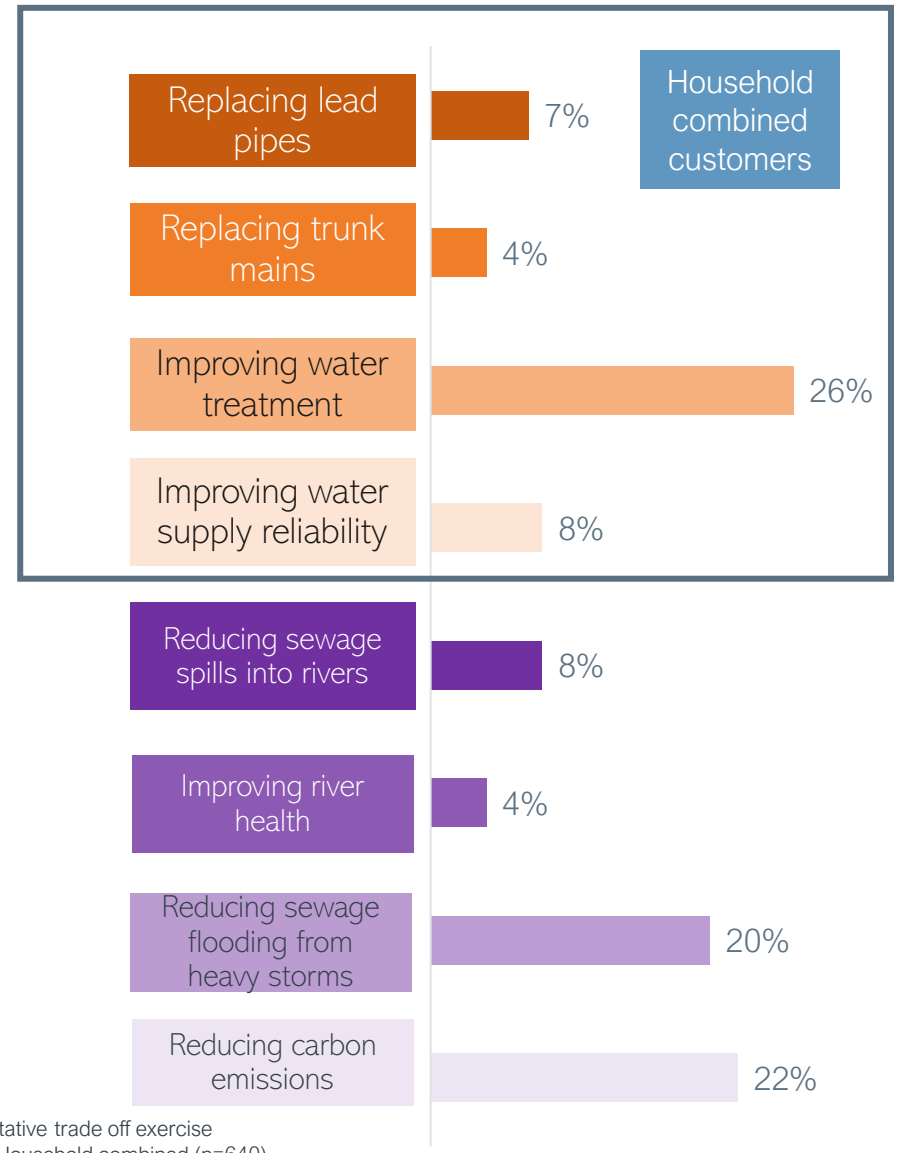
Customers approach all discussions on improvements and enhancements with some degree of scepticism.

This is driven by the context of the cost of living crisis which has made everyone more financially sensitive, as well as recent (negative) news stories surrounding the water industry specifically.

In qualitative discussions, enhancements are assessed primarily in terms of the level of perceived impact and ease of implementation.

Impact is discussed in terms of both personal and societal impact, including the number of people who would benefit. Ease is comprised of cost, time and levels of disruption.

Executive summary of research findings (2/3)



Quantitative trade off exercise
Base: Household combined (n=640)

Across the quantitative and qualitative data, there are differences in the preferred enhancements. However clear themes do emerge:

For water enhancements, safety is a priority:

- Quantitatively, improving water treatment is the strongest driver for customers to choose an enhancement package for clean water services.
- Qualitatively, replacing lead pipes is seen as key as it is felt to be a safety issue and is particularly emotive given the reference to babies and young children.

For wastewater enhancements, sorting out the broken sewage system is a priority:

- Quantitatively, reducing sewage flooding from heavy storms is the second strongest driver for customers to choose an enhancement package for wastewater services, apart from wastewater only customers for whom it is the number one driver.
- Qualitatively, reducing sewage spills is key. This was likely driven by media stories at the time of the qualitative workshops.

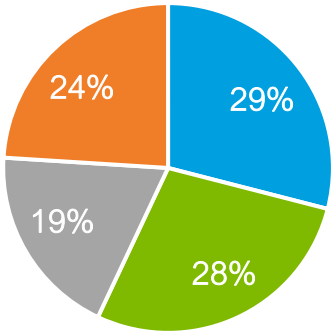
'Reducing carbon emissions' also emerges as a top priority quantitatively for all customer groups apart from wastewater only.

- However, qualitative discussions show that while reducing carbon emissions is universally agreed to be important, some feel this should not be an enhancement, but rather a core part of Thames Water's service.

Executive summary of research findings (3/3)

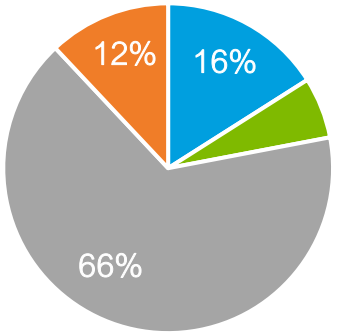
Despite some differences in views on the individual enhancements, both quantitative and qualitative results are consistent in terms of packages.

Household – Combined services



For combined customers, a well-balanced package representing all enhancements areas (Package A) is most preferred. There is very similar support for a package with a more water focused approach (Package B), but this also had a polarising effect as its omission of some wastewater enhancement areas was disliked by some customers.

Household – wastewater only



For wastewater only customers, a package with ambitious targets and including all enhancements (Package C) is most preferred. However, in the qualitative discussions (where the bill impact was also given) some customers were put off by the higher price tag of this package in comparison to others.

Quantitative trade off exercise: package preference when compared to each other in the simulator
Base: Household combined (n=640), Non-household combined (n=340)

Differences by customer type

Qualitatively, views are relatively consistent across customer groups, though there are some differences to note:

Household customers **vs.** Non-household customers

Non-household customers generally place greater emphasis on enhancement areas with a financial (e.g. sewage flooding that would cause them to close) or reputational (e.g. carbon emissions that tie into wider organisational aims) impacts on businesses compared to household customers.

London-based customers **vs.** Non-London based customers

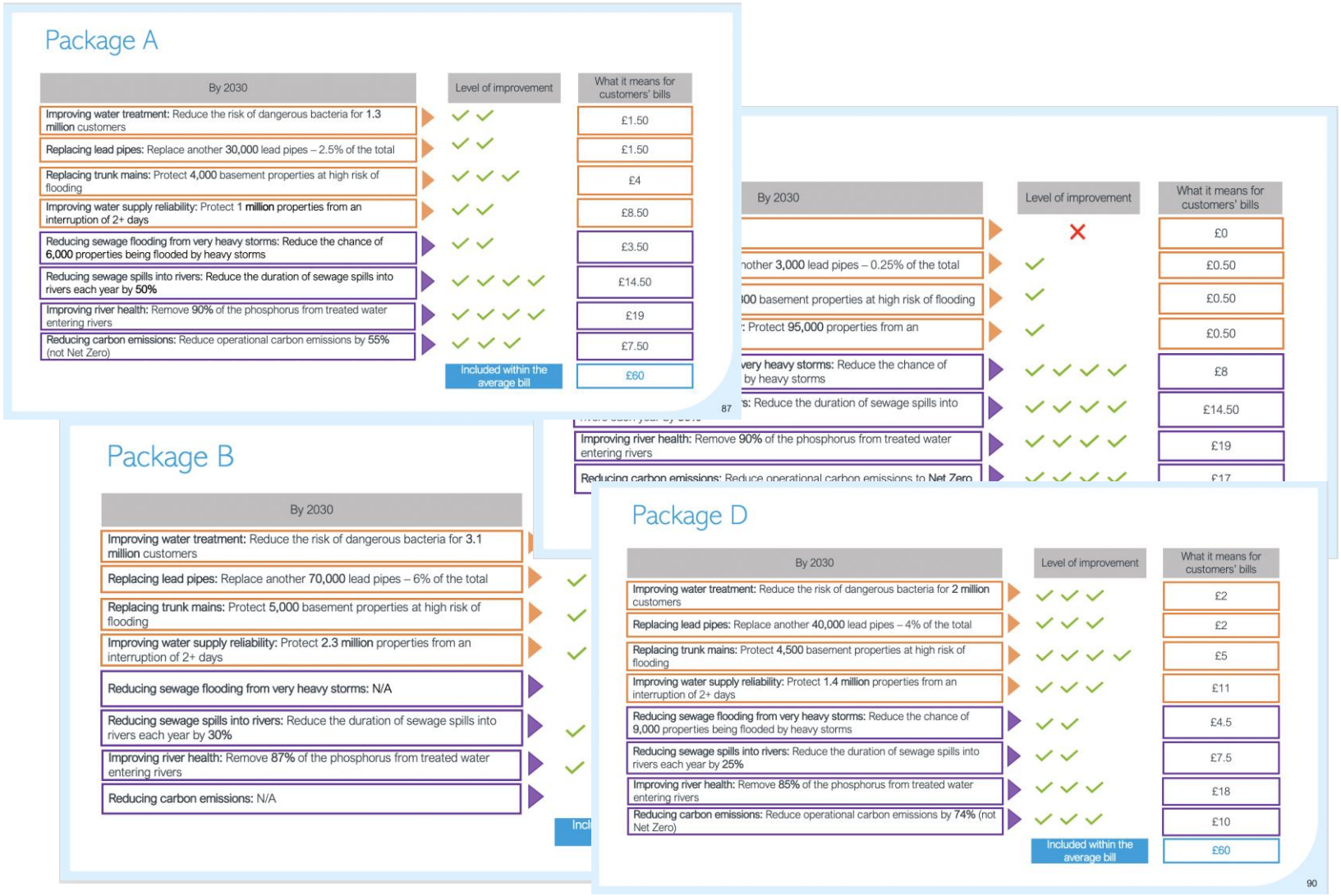
Customers based outside of London are less concerned about enhancement areas perceived to be 'London-centric' (i.e. replacing trunk mains and improving water treatment) with many viewing this as unfair and asking questions about how these areas might be addressed outside of London.

Beyond this, there were no clear differences in views in terms of other key demographics e.g. ethnicity, age, gender, SEG.

Customers were shown a series of different enhancement packages to review

In qualitative workshops, customers were shown packages with bill impacts. For combined customers, these were equal and fixed, whilst for wastewater only customers these were variable. They were shown the enhancement areas first and then bill impacts were revealed.

Quantitatively, customers were not shown package costs because during the trade-off exercise cost was omitted as there was a risk it would dominate the trade-off exercise and potentially lead to flat data, meaning it would not be clear which enhancement areas are more or less important or preferred by customers.



Please see the Appendix for all stimulus shared.

Quantitatively, all customers were similarly driven by three or two enhancement areas, as shown by the utility scores below

Key drivers of choosing an enhancement package (utility scores)

Household customers

Combined customers

- 26% Improving water treatment
- 22% Reducing carbon emissions
- 20% Reducing sewage flooding from heavy storms

Waste only customers

- 50% Reducing sewage flooding from heavy storms
- 32% Reducing carbon emissions

Non-household customers

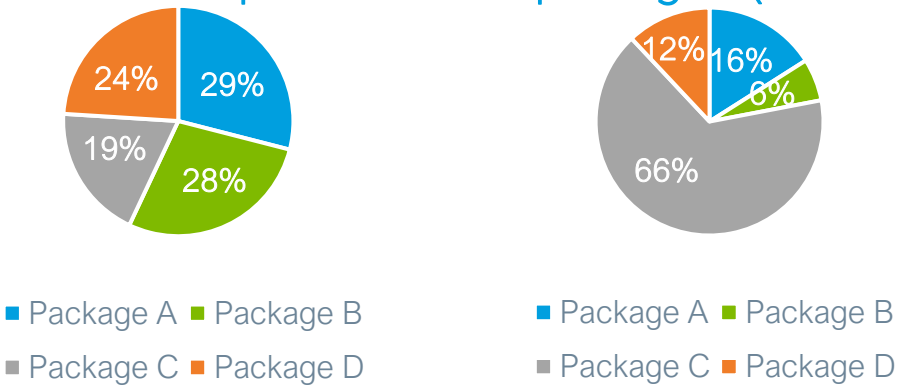
Combined customers

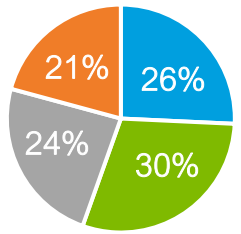
- 27% Improving water treatment
- 21% Reducing carbon emissions
- 20% Reducing sewage flooding from heavy storms

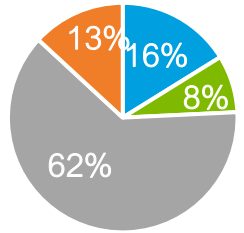
Waste only customers

- 39% Reducing sewage flooding from heavy storms
- 39% Reducing carbon emissions

Customer preference for packages (when created in the simulator and compared against each other)







Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340), Household waste only (n=360), Non-household waste only (n=160)

Quantitatively, non-household customers like packages B and C, which cover a range of enhancements at higher levels of improvement

Non-household customers

Key drivers of choosing an enhancement package (utility scores)

Combined customers

27% Improving water treatment

21% Reducing carbon emissions

20% Reducing sewage flooding from heavy storms

Waste only customers

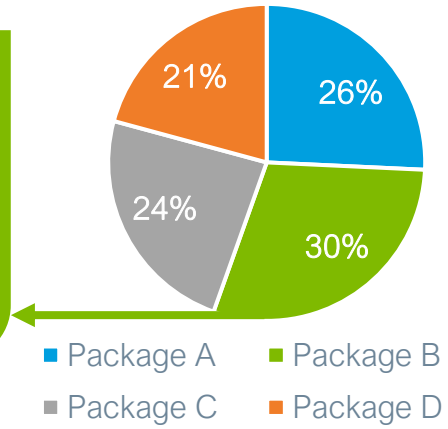
50% Reducing sewage flooding from heavy storms

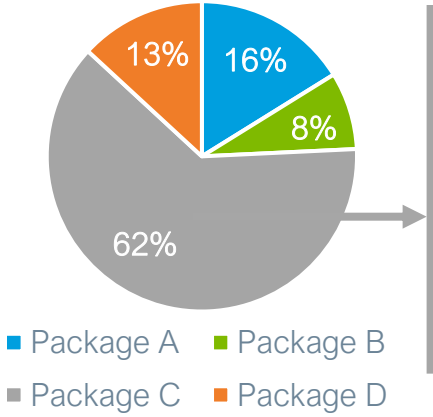
32% Reducing carbon emissions

Package preference (when created in the simulator and compared against each other)

"It's concentrating efforts. If you spread yourself too thin nothing is really going to be hit because there's no real focus."

(NHH Customer, Reading)





"Bottom line everything has to be approached, and individually this helps everyone, do everything and don't neglect anything."

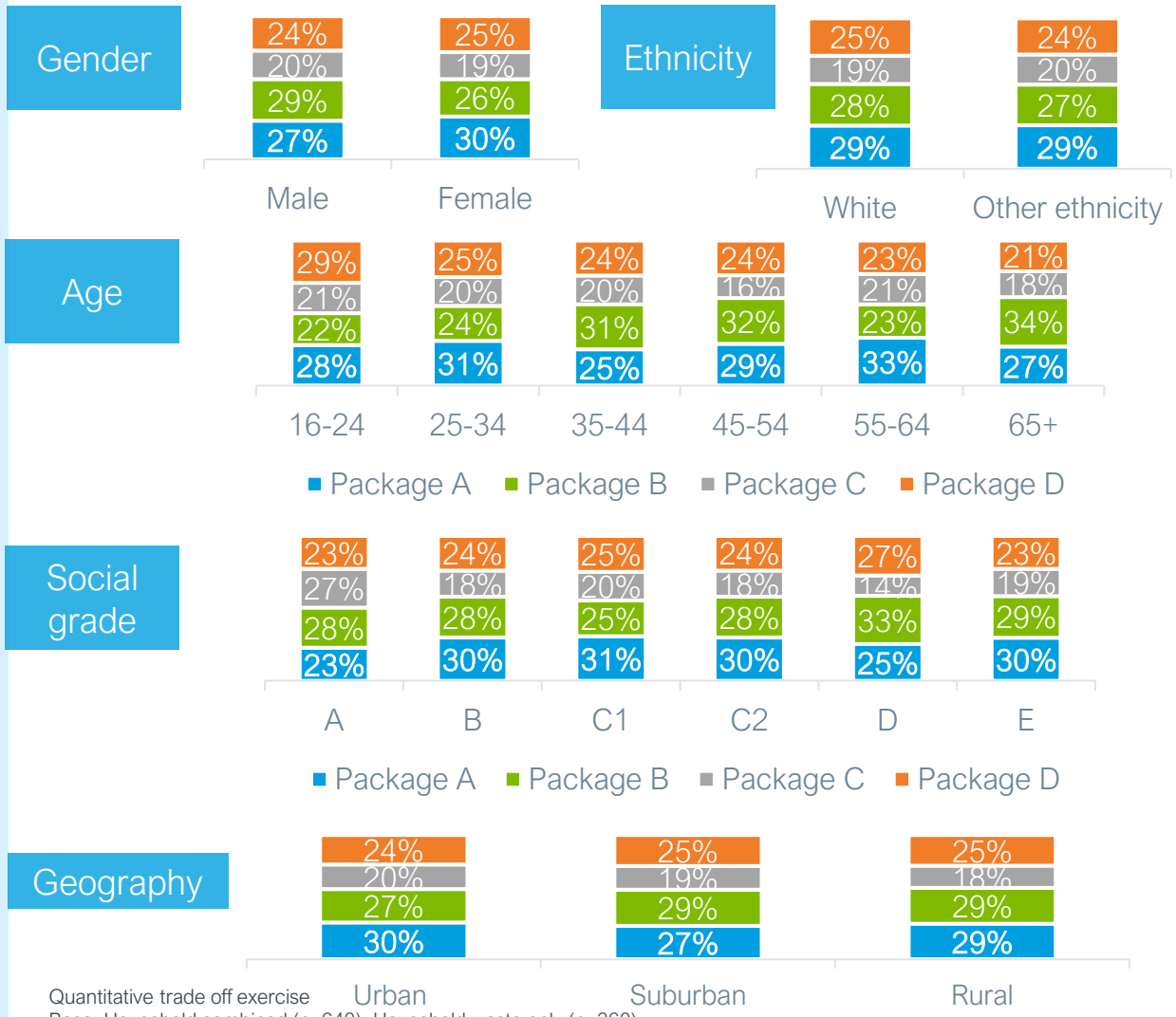
(HH Customer, Watford)

Quantitative trade off exercise
Base: Non-household combined (n=340), Non-household waste only (n=160)

Among household customers, the preference for each of the packages is similar across demographic groups

Household customers

Combined customers



Waste only customers

Quantitative trade off exercise
Base: Household combined (n=640), Household waste only (n=360)

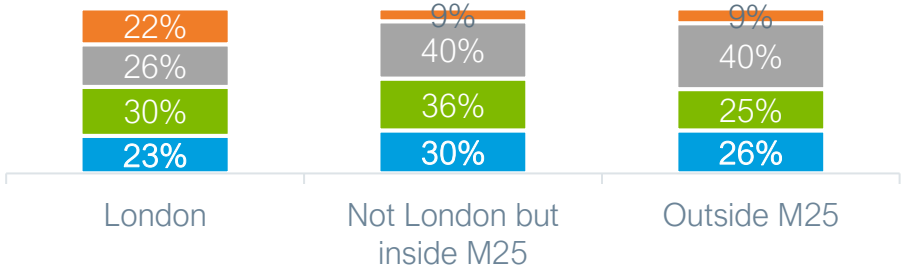
Non-household customers in accommodation and food services have a greater preference for package A and larger companies prefer package B

Package preference (when compared against each other)

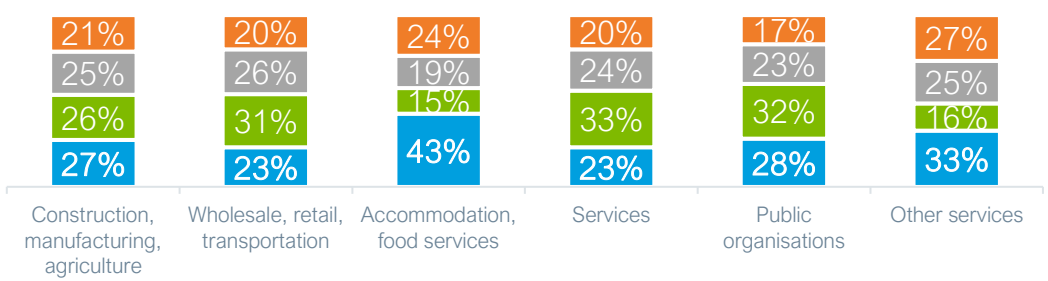
Non-household customers

Combined customers

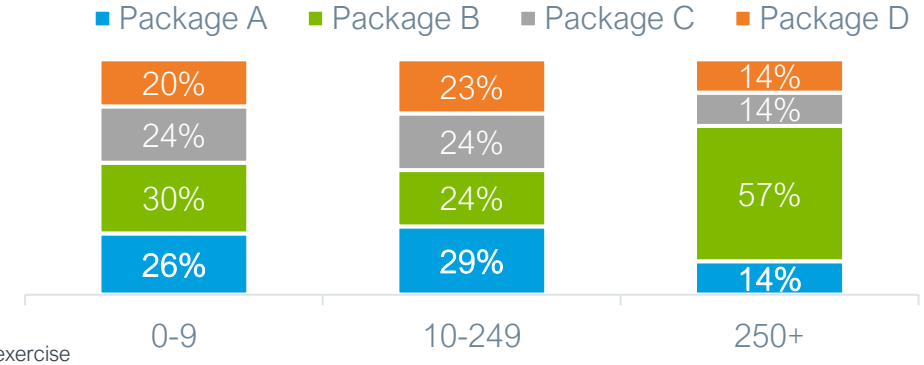
Location



Industry type

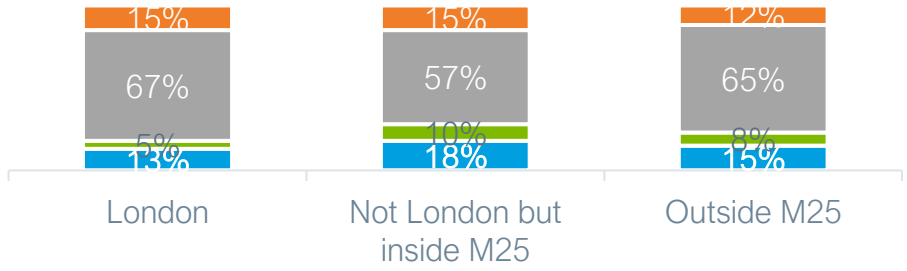


Company size



Waste only customers

Location



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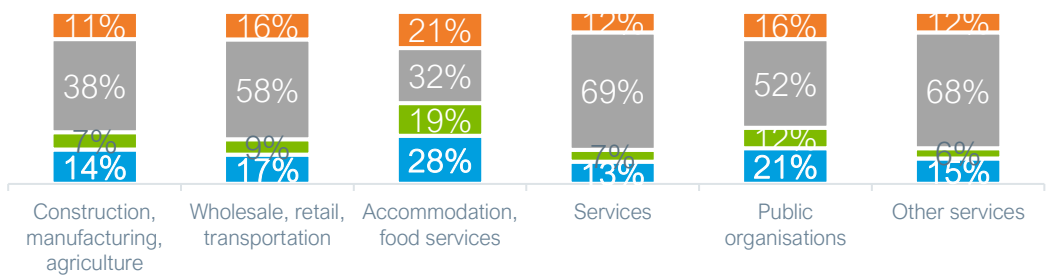
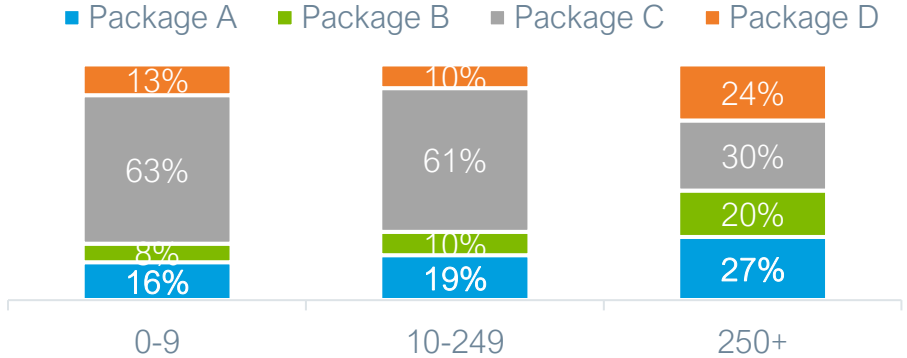


Company size



Quantitative trade off exercise
Base: Non-household combined (n=340), Non-household waste only (n=160)

Background & methodology

Background & objectives

Background

- As per Ofwat guidance, water companies need a long-term strategy to meet the need for water supplies and wastewater services in the future, whilst maintaining value to customers, the environment and wider society.
- This strategy must be informed by robust customer engagement and should represent a shared understanding of priorities and ambition.
- Research was therefore required to understand customer views.

Objectives

- Explore and understand customers current priorities for service enhancement, and how these do or don't align with Thames Water's plans for the future.
- Understand how customers feel about specific enhancement propositions within each service area.
- Explore and understand how customers weigh up 'packages' of enhancement propositions brought together from different service areas.

Research methodology

Qualitative deep dives

- 5 in person workshops with a mix of household (HH) and non-household (NHH) customers:
  - 3 x combined services workshops
  - 1 x wastewater only workshop
  - 2 x customer panel workshops
  - 2 x NHH combined paired depths* (1 x online, 1x in person)*
- All audiences completed an online pre-read pre-task prior to fieldwork.
- Fieldwork took place between 10th - 23rd August 2022.
- Recruitment of customers was 'free find' using our recruitment partner Central Fieldwork and their network of local recruiters.

Quantitative testing

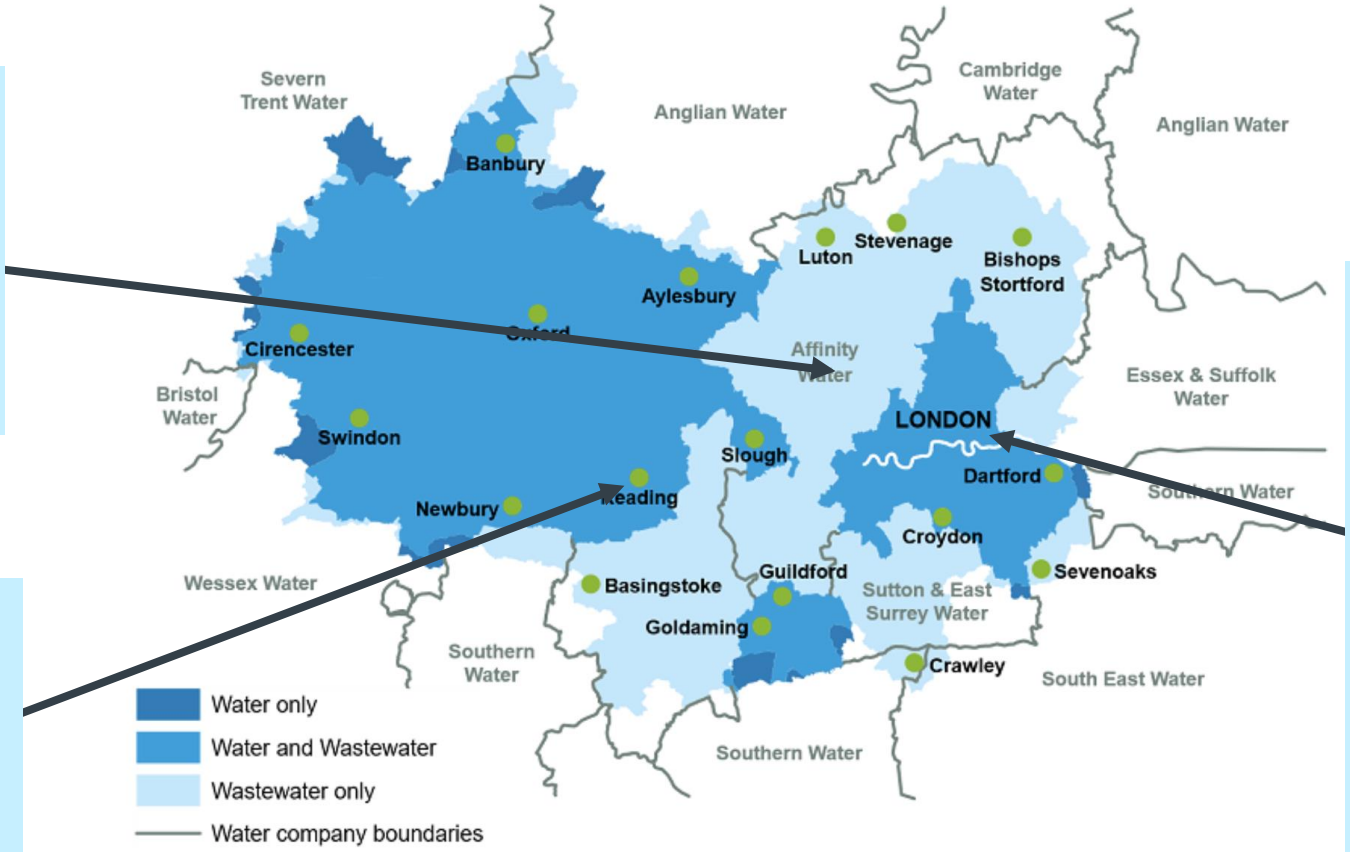
- A large sample of household (1,000) and non-household (500) customers surveyed quantitatively to gather representative and robust customer data on preferences for service enhancements and the extent to which an enhancement can be made.
- Fieldwork took place from 26th August to 9th September 2022.
- Conducted by our survey partner Rigour Research using their online research panels.

**Rescheduled fieldwork due to sickness*

Qualitative method and sample

One in-person workshop in Watford with 24 waste only customers (20 x HH, 4 x NHH)

One in person workshop in Reading with 21 combined customers (16 x HH, 5 x NHH)



Five workshops in London with:

- 1 x combined customer workshop (18 x HH)
- 2 x customer panel workshops (8 x HH; 4 x NHH)
- 2 x NHH customer paired depths* (1 x online, 1 x in person)

Rescheduled fieldwork due to sickness

Qualitative sample in detail

54 Household (HH) customers,13 Non-Household (NHH) customers and 12 Customer panel participants.							
Age	Gender	Household SEG	Rural / urban	Ethnicity	Living situation (HH only)	Water meter	Vulnerabilities* & PSR
3 x 16-18 6 x 19-24 14 x 25-34 14 x 35-44 22 x 45-54 9x 55-64 11 x 65+	40 x Male 39 x Female	34 x AB 25 x C1 12 x C2 8 x DE	47 x Urban 29 x Semi-urban/Semi-rural 3 x Rural	52 x White 4 x Mixed 13 x Asian 10 x Black	30 x Homeowner 13 x Private renter 8 x Housing association 11 x Local authority	38 x Unmetered 41 x Metered	24 x with a vulnerability 4 x on the PSR

Changes to the initial sample were made based on feedback from the CCG, including increasing the number of ethnic minority participants in London. Note urban representation is high due to the workshops being in person, which meant central urban locations were selected.
*Vulnerabilities included: Claim a private pension, claim a state pension, claim benefits, have a disability, health condition or serious illness, have a medical condition that requires consistent supply of water, have a child living in your home ages 0-3 years old, need extra support due to life-changing events.

Quantitative sample in detail

We applied and achieved quotas to make the sample representative of the Thames Water population:

Household		Quota %	Quota n	Achieved n
Age	16 – 24	15%	150	150
	25 – 34	21%	210	210
	35 – 44	19%	190	190
	45 – 54	17%	170	170
	55 – 64	12%	120	120
	65+	16%	160	160
Gender*	Male	49%	490	483
	Female	51%	510	510
SEG	ABC1	62%	620	620
	C2DE	38%	380	380
Ethnicity	White	74%	740	740
	Other ethnicity	26%	260	260
Disability**	Yes	14%	140	140
	No	86%	860	852
Service provided	Combined	64%	640	640
	Wastewater only	36%	360	360
Total			**1,000**	**1,000**

Non-household		Quota %	Quota n	Achieved n
Location	London	39%	195	195
	Not London but inside M25	27%	135	135
	Outside M25	33%	165	165
Industry type	Construction, manufacturing, agriculture	16%	80	80
	Wholesale, retail, transportation	14%	70	70
	Accommodation, food services	7%	35	35
	Services	48%	240	240
	Public organisations	9%	45	45
	Other services	7%	35	35
Company size	0-9 employees	90%	450	450
	10-249 employees	9%	45	45
	250+ employees	1%	5	5
Total			**500**	**500**

* 4 described themselves as other, 3 selected prefer not to say
** 8 selected prefer not to say

Quantitative approach in detail

1,000 household and 500 non-household customers undertook a 15-minute online survey, which consisted of the following:

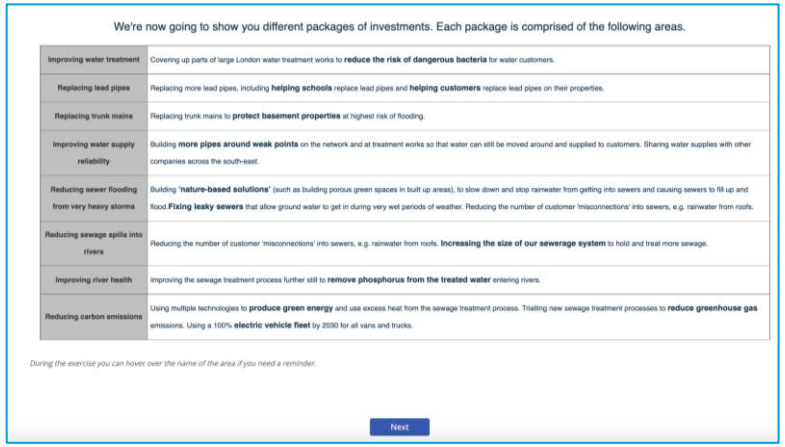
Survey section	Aim of survey section
Profiling	To ensure we are capturing a robust and representative sample of Thames Water customers, so that the survey results can be relied upon.
Customer experiences of Thames Water	To obtain a read on customer satisfaction, awareness of Thames Water and the services they provide, and level of engagement with Thames Water in the past 12 months. Having this data provides more detailed insight that can be overlayed to customer preferences for enhancement packages.
Appeal of packages and service attributes	To provide context and information to prepare customers to conduct a trade-off exercise, and then to conduct the trade-off exercise. Customers were shown (slides taken from the qualitative research stimulus): • 2 PowerPoint slides on screen with information on what Thames Water does and some of the challenges it faces. • 2 PowerPoint slides on screen showing the targets Thames Water has set itself to make sure it improves the service it provides and addresses future challenges • 2 PowerPoint slides on screen showing and explaining how bills are split between core service and 'raising the bar' improvements. • 2 PowerPoint slides on screen showing ideas Thames Water has for 'raising the bar' improvements. • A max of 8 PowerPoint slides on screen showing in more detail each of the service areas where 'raising the bar' improvements could be made. Customers then undertook the trade-off exercise as detailed on the following two slides.

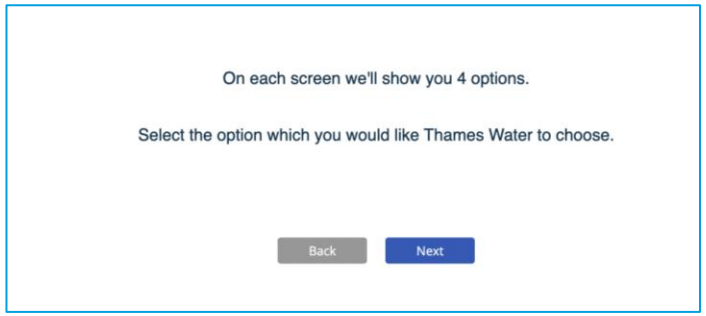
Why customers undertook a trade-off exercise within the online survey

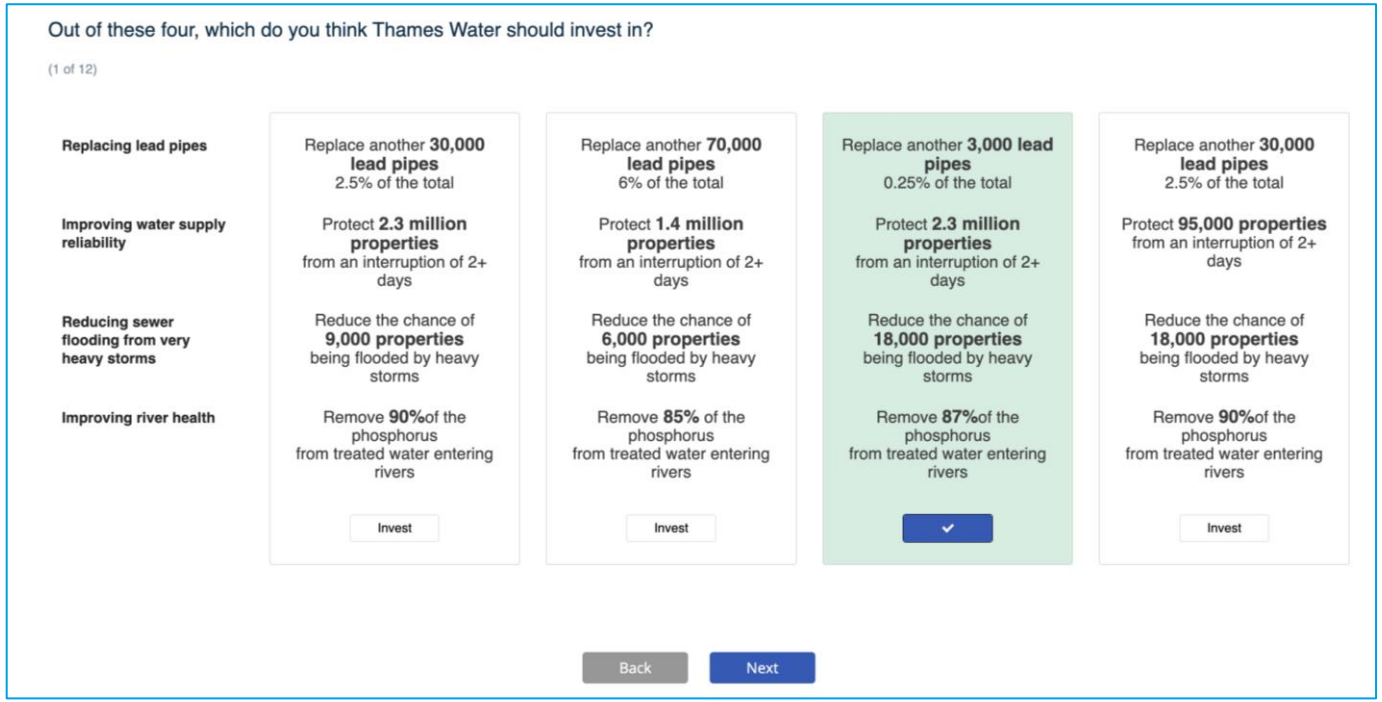
- It was important to include a trade-off exercise within the online survey because it gave us an accurate estimate of customer preference for packages and the enhancement areas and levels that make up those packages, because it was based on a large representative sample of Thames Water customers.
- Also, the trade-off exercise was important to include because the response data it generated enabled us to identify what patterns there were in the choices customers made, and use those patterns to identify which enhancement areas and their levels are most likely to drive customers to choose packages.
- The trade-off exercise was also important to include because it enabled us to create a simulator output with the data it generated, which enables Thames Water to simulate different combinations of packages and see what the % customer preference would be (based on the participants that completed the online survey).

How customers undertook the trade-off exercise within the online survey

- Just before customers undertook the trade-off exercise, over two screens they were reminded of the enhancement areas that they had already seen information on, but this time in relation to what they would see and need to do in the trade-off exercise .
- Customers were then shown 4 different packages of enhancements on a screen and asked to choose which they think Thames Water should invest in (price was not included as explained on page 86).
- This was repeated across multiple screens with different combinations of packages each time, to gain a robust understanding of which levels of each enhancement are most preferred by customers.







How we make sense of the online survey's trade-off exercise data

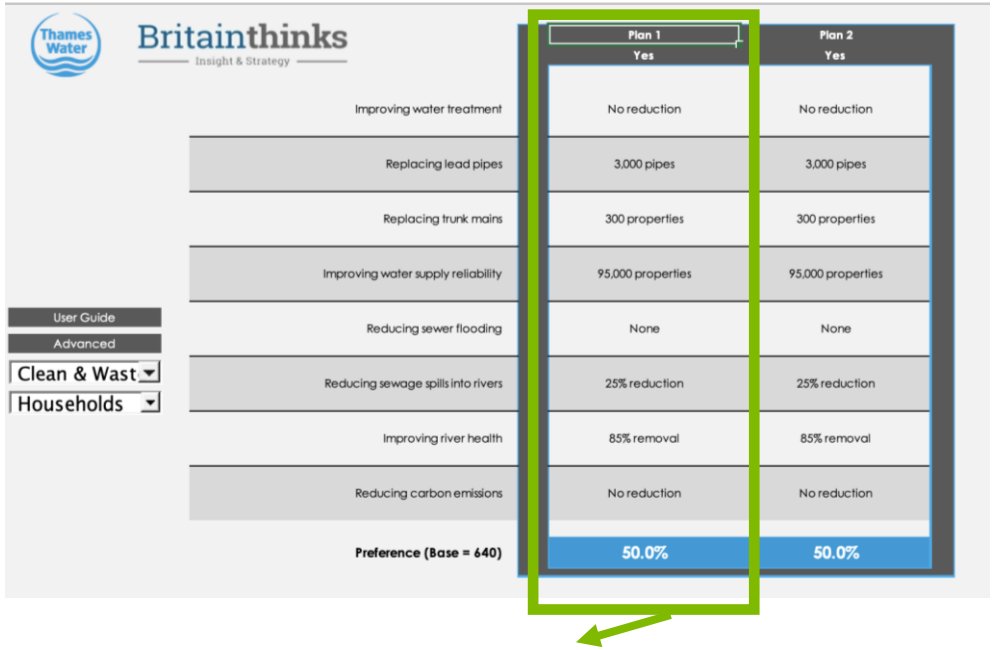
- We created a simulator within an Excel document.
- This simulator allows us to recreate and 'simulate' enhancement packages based on those shown to participants during the online survey. Using the response data gathered from the trade-off exercise, we can understand what the % customer preference for any given package would be.
- The simulator allows us to understand the extent to which changing the level of improvement for an enhancement area can impact customer preference.
- We have used this simulator to generate the trade-off exercise data that is shown in this report.

	Plan 1 Yes	Plan 2 Yes	Plan 3 Yes	Plan 4 Yes
Improving water treatment	No reduction	No reduction	No reduction	For 1.3 million customers
Replacing lead pipes	3,000 pipes	3,000 pipes	3,000 pipes	40,000 pipes
Replacing trunk mains	300 properties	300 properties	300 properties	4,500 properties
Improving water supply reliability	95,000 properties	95,000 properties	95,000 properties	2.3 million properties
Reducing sewer flooding	None	None	None	None
Reducing sewage spills into rivers	25% reduction	25% reduction	25% reduction	25% reduction
Improving river health	85% removal	85% removal	85% removal	85% removal
Reducing carbon emissions	No reduction	No reduction	No reduction	No reduction
Preference (Base = 640)	**10.8%**	**10.8%**	**10.8%**	**67.5%**
Range of Confidence	10.4% -11.3%	10.4% -11.3%	10.8% -10.8%	67.5% -67.5%

To test the appeal of improvement levels within enhancement areas we have used a simulator with a base case package

- A base case package is a hypothetical enhancement package used to test against different enhancement packages for customer preference.
- We have defined this base case package as containing the lowest level of enhancement for each enhancement area (shown here in green – 'Plan 1').
- This allows us to fully test the extent to which changing an improvement level within a different enhancement package ('Plan 2') can affect customer preference, as nothing else has changed.
- We have used this base case package in the 'Water enhancements' and 'Wastewater enhancements' sections of this report to move levels up and down in 'Plan 2' to see what this does to customer preference scores.

Base case package



Improving water treatment: No reduction

Replacing lead pipes: Replace another **3,000** pipes – 0.25% of the total

Replacing trunk mains: Protect **300** basement properties at high risk of flooding

Improving water supply reliability: Protect **95,000** properties from an interruption of 2+ days

Reducing sewage flooding from very heavy storms: No reduction

Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **25%**

Improving river health: Remove **85%** of the phosphorus from treated water entering rivers

Reducing carbon emissions: No reduction

Future challenges, improvements and raising the bar

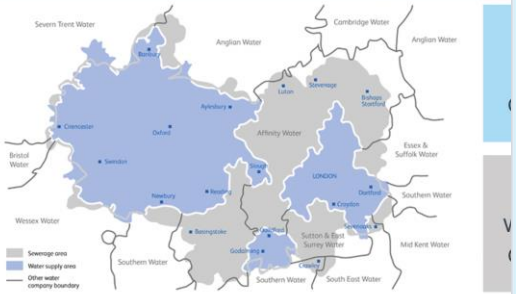
The media, the economic context and personal experience influence how customers approach the research

The media	• Stories around utility company Senior Executive and CEO salaries provoke scepticism and for some, anger that customers are 'footing the bill'. • Coverage of sewage being dumped into rivers on television, as well as local flooding events (e.g. in Islington) elevate their importance in customer minds.
Wider economic context	• The cost of living crisis (CoL) dominates the public mood and is the lens through which customers approach all organisations, including water companies and Thames Water specifically. • Customers fall back on the rising energy prices as a comparator when assessing how 'fair' their water bill feels.
Personal experience	• Recent high temperatures across the UK bring climate change concerns to the fore for many customers. • Where customers have witnessed sewage floods (e.g. into their neighbour's basements or local rivers), water leaks or burst pipes (e.g. in their street), these feel more pressing.

Customers that took part in the qualitative workshops were first given a pre-task with key information about Thames Water and its future challenges

Introduction to Thames Water

Thames Water is the UK's largest water and wastewater services provider



Thames Water supplies an average of 2.7 billion litres of drinking wate
homes and businesses and it treats almost 5 billion litres of sewage a

Background to water indu

There are a number of different companies ir
water is safe, reliable and environmentally frie

England and Wales are served by 17 different water companies: some provide just drinking water, others take away sewage as well. Companies in the same area work together to plan for the future in their region, and work with the other regional groups across England to make sure there is enough water for everyone.

52

Challenges for Thames Water

Thames Water are facing several challenges that must be tackled now, and in the future

• Population growth	• In the future, demand for water will increase as there are more people, more homes and more businesses to supply
• Climate change	• The effects of climate change mean that there will be less water available to meet the increasing demand from customers (e.g. hotter and drier summers could mean more water shortages and risk of drought)
• Declining river quality and biodiversity	• Widespread pollution (e.g. sewage, plastics, chemicals) is threatening freshwater habitats and biodiversity in the UK (currently no UK rivers are officially safe to swim in) • To reduce negative impacts on fish, wildlife, plants and recreation, water companies will be allowed to take less water from sensitive water sources
• Ageing infrastructure	• Old pipe networks and treatment works mean higher maintenance needs and costs • The effectiveness of the infrastructure may also decline with age and may become potential safety hazards

Planning ahead in a meaningful way can help Thames Water to solve some of these challenges and consider how their future plans might impact some of these issues (e.g. reducing leakage can help increase water supply)

57

Please see the Appendix for all stimulus shared.

Customers recognise the challenges being faced, but are mixed in their views of Thames Water in light of them

- Customers recognise the challenges Thames Water faces as **relevant, significant and necessary to overcome. In particular climate change** (particularly as many witnessed high temperatures over summer) **and ageing infrastructure** (particularly where customers have either witnessed leaks or pipe bursts themselves or seen stories on the news).
- **However, there is a divide among customers** as to how they feel about Thames Water taking on these challenges:

Some are impressed and reassured that Thames Water is considering these as part of its long-term plans.

Others are less favourable and **feel Thames Water should have been more proactive** in helping to tackle these challenges already and are frustrated with what they see as a lack of progress.

"The pipes are so old. If they turned them into brand new pipes that would help with everything."

(HH Customer, London)

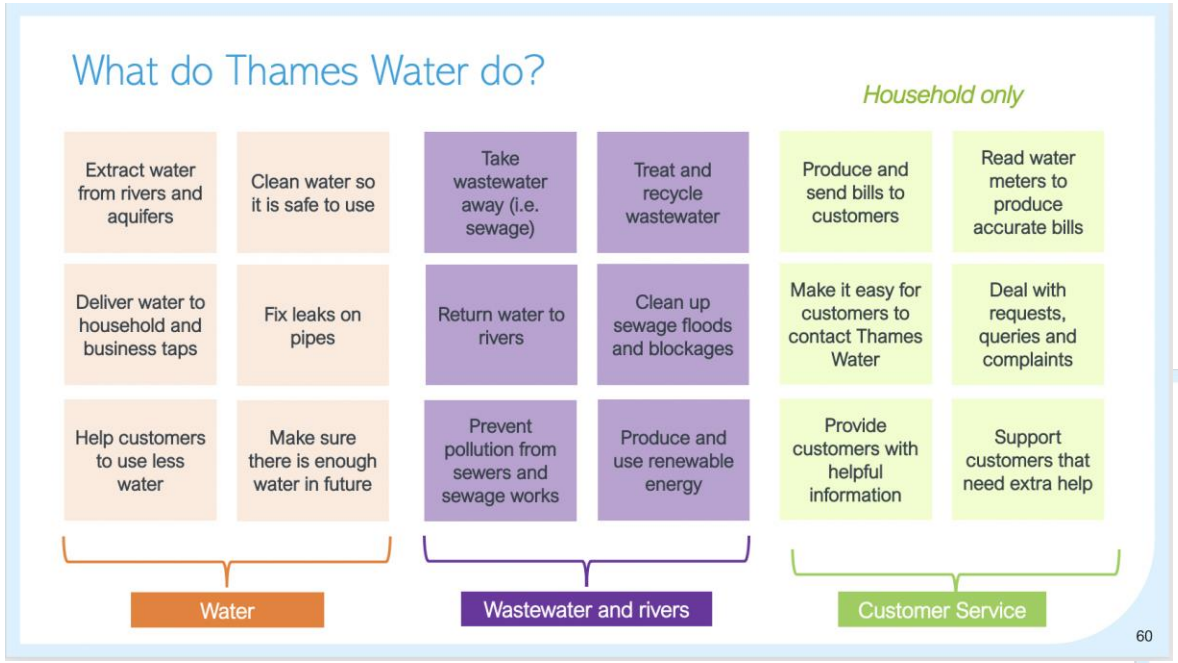
"Two days ago we had a burst water main in North London because of weak, ageing infrastructure…the consensus was that Thames are not putting enough money into refurbing those sensitive areas under London's streets. It's the third one in three years, and it has an enormous impact. It shocks businesses - it's devastating."

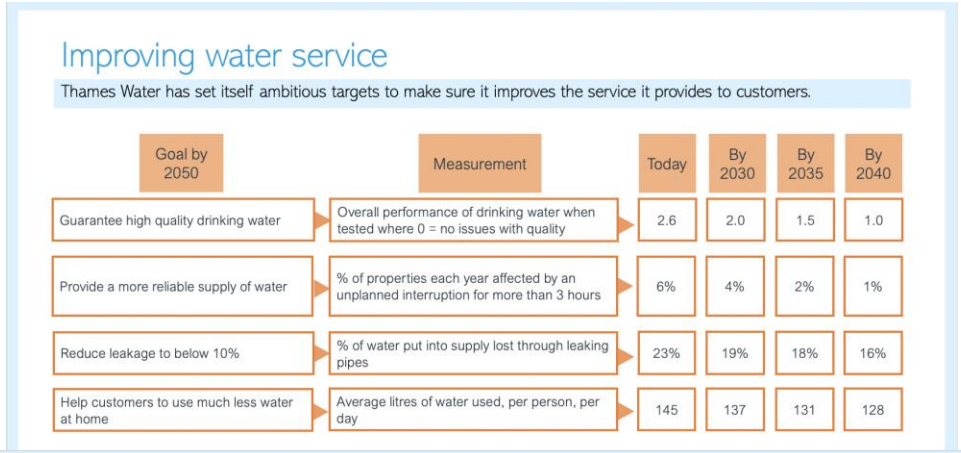
(NHH Customer, Watford)

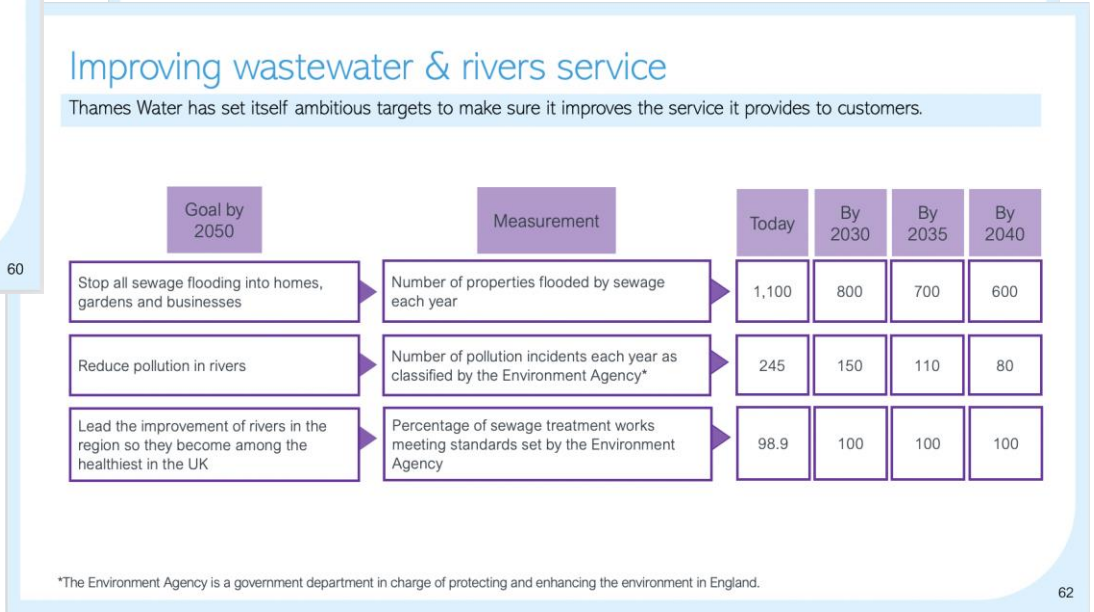
"What are you going to do about climate change? Didn't France run out of water last week? This is going to face everyone on the planet in the next few years. It feels worrying… like we've seen this summer with climate change. I remember in the 1976 heatwave having to all share the water for a bath and then use the bathwater to water the garden with and flush the toilet ."

(HH Customer, Reading)

Customers were then shown information* on Thames Water's current improvement plans







*In qualitative workshops. Please see the Appendix for all stimulus shared.

Thames Water's broad improvement plans are met with some scepticism and a desire to see them go further

- On the whole, **customers appreciate Thames Water's** areas of focus for fresh water and wastewater and rivers. However, there are some concerns around:

A **lack of contextual information** making it difficult for customers to come to an informed view, and a substantial minority (those more engaged) feeling scepticism that Thames Water is withholding information to make the enhancements sound more appealing.

"They're throwing numbers at us, but not telling us where these numbers are coming from. It seems like they're pulling wool over our eyes."

(HH Customer panel, London)

The **targets feeling unambitious**, with 2050 feeling far away for addressing areas perceived as an imminent and urgent area to address (e.g. leakage). This is exacerbated by personal experience and media stories on these topics.

"We heard earlier about their hundred year plan, but none of us will be here. These figures are a bit banal, I'd have thought they could be a bit more impressive."

(HH Customer panel, London)

A **perception that Thames Water is being reactive rather than proactive** which leaves some feeling less assured of Thames Water achieving its goals.

" I don't understand why this is being dealt with now. I'm happy they're looking at this stuff and improving it, but I'm baffled as to why nothing has been done about this before."

(HH Customer, Reading)

While admirable, Thames Water's core service improvements for water feel unambitious, and for some add concerns

Higher priority

Lower priority

Reduce leakage to below 10%	• There is **widespread shock about the volume of water lost through leakage** with many seeing this as wasteful – for some, asking customers to cut back their own usage in this context is seen as unfair. • **There is a sense that resolving leakage issues is important** (particularly where customers perceive burst pipes or leaks go unaddressed) and **could have a positive knock-on effect** on other areas (e.g. reliability of supply and less of a need for customers to cut down).
Guarantee high quality drinking water	• **Providing high quality drinking water feels like the minimum requirement for a water company** so **some question why this is not the case already, and why improvements are required.** • Others who **feel there are no issues with UK water quality** question **why this is being prioritised.**
Provide a more reliable supply of water	• While important on the surface, **where customers have not experienced an unplanned interruption themselves, this felt like less of a priority** (particularly given the perceived low starting percentage). • However, **for a few (e.g. those with specific health conditions) this should be achieved as quickly as possible** as interruptions to supply have more serious consequences.
Help customers to use much less water at home	• This area **provokes mixed reactions** – **some welcome the aim** and want to hear more from Thames Water about how customers can do this. **Others feel like they have been hearing this 'for years'** and **that it would be difficult to implement or track.** A **few also feel they already 'do their bit'** and there is some resentment at being asked to make changes given leakage levels and media stories around the salaries and profit margins in utility companies.

Overall, Thames Water's wastewater improvements are less divisive aside from sewage flooding

Higher priority

Lower priority

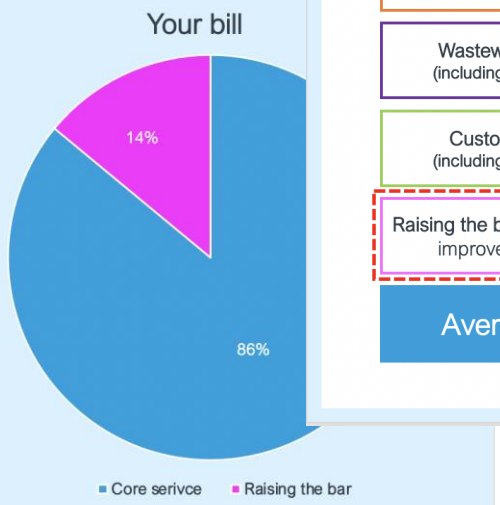
Stop all sewage flooding into homes, gardens and businesses	• For many, **the impact of sewage flooding feels most severe, tangible and dangerous** given the potential for personal belongings and property to be damaged in the long term as well as the potential for health risks from the bacteria. As a result, **many feel the targets could be more ambitious both in terms of timelines and overall performance.**
Reduce pollution in rivers	• While less personally damaging compared with sewage flooding, there is general agreement that **Thames Water should be reducing pollution in rivers** sooner rather than later. • For some, **this comes from seeing news stories about sewage** being 'dumped' in rivers while **for others, it is about a wider negative impact on wildlife** and the surrounding environment.
Lead improvement of rivers in the region so they become among the healthiest in the UK	• While **learning that no UK river is officially safe to swim in is shocking and concerning, this is felt to be of lower importance in comparison to others** where customers felt there were health risks (i.e. sewage flooding) and severe environmental risks (i.e. river pollution).
Help tackle climate change by becoming 'net negative'*	• While **it feels important that Thames Water 'does its bit'** to help tackle climate change, the **impacts feel more distant and intangible** compared to other areas (e.g. sewage flooding). • The **targets are impressive but raise questions over achievability** as well as a desire to know how this will be done, and for a few, wariness over companies 'green washing' (claiming to be more environmentally friendly than they actually are).

**Climate change targets were only tested with the waste only customers in Watford and London customers. The 'reducing carbon emissions' enhancement targets appeared to be lower than those shown in the improvements delivered as part of the core service delivery. Climate change targets were therefore removed as a core service improvement in materials for later workshops.*

Finally, customers were shown information* about 'raising the bar' and bill implications

Household customer bills

- The money you pay to Thames Water each year goes toward a mixture of
  - Core service delivery and improvements (86%) as Thames Water works toward long-term targets, as well as
  - 'Raising the bar' improvements (14%) where Thames Water can 'do more to go further' to help achieve some long-term targets more quickly.



63

What this means for household customers' bills moving forward

		Today	By 2030	By 2035	By 2040
Water (including improvements)	86%	£327	£360	£387	£413
Wastewater & Rivers (including improvements)					
Customer Service (including improvements)					
Raising the bar – doing more to improve even further	14%	£53	£60	£63	£67
Average annual bill		£380	£420	£450	£480

64

In qualitative workshops. Please see the Appendix for all stimulus shared. Stimulus varied between HH and NHH customers.

On the surface, customers are positive about the bill breakdown and increase…

- On an initial look, customers are broadly indifferent to (and even onboard with) the bill breakdown and increase, in particular:

✓ Many are reassured that improvements will be made as part of the core service without the need for funding through 'raising the bar'.

"I think they're doing quite a complicated job, it's not easy….what I appreciate is the fact that Thames Water is aware that there are issues."

(HH Customer panel, London)

✓ The bill increases feel relatively modest, particularly in the context of other utility bills and recent increases to the energy price cap.

"It's not that much money…In comparison to gas and electric, which is pretty much your whole wages each month."

(HH Customer, Reading)

It should be noted that there is some sensitivity around discussing bill increases given the cost of living and energy crises, and as a result, some doubt around how realistic Thames Water's projections are.

…but on closer interrogation the majority of customers become increasingly sceptical about the detail

- When considering the bill breakdown and proposed increases further, customers raise questions around:

How the bill breaks down further (i.e. how much goes into profit, overheads etc.), generating scepticism around the transparency of Thames Water overall.

"Their accounting is rather opaque. There is no mention of how much money is profit to the owners."

(HH Customer, London)

The origin of the 14% (i.e. how did Thames Water land on this bill split? Why can't more go toward raising the bar? Or why can't Thames Water not 'raise the bar' and bring customers bills down?)

"Could that 14% not be spent on people improving their own water systems? I don't think people are going to appreciate their bills going up."

(NHH Customer, Reading)

What underpins the 'raising the bar' proposition (i.e. what has Thames Water done so far? What has been the focus of 'raising the bar' in the past?)

"Surely they should be saying we've got to do these things so this is how much we need, rather than this is what we want to get away with charging and then we'll do this to justify what we've got coming in?"

(HH Customer panel, London)

As a result, customers then review the enhancements themselves with some scepticism, often questioning the branding of an activity as 'raising the bar' and whether they are seeking praise for work that should be considered standard.

Deep dive: Enhancements

Combined customers in both the qualitative workshops and quantitative survey were shown four enhancements relating to water

Improving water treatment: Covering parts of water treatment works in London to reduce the chance of dangerous bacteria entering the water supply and making customers unwell.

Replacing lead pipes: Replacing lead water pipes within Thames Water's pipe network, in homes and in schools, to stop lead entering the water supply.

Replacing trunk mains: Replacing very large water pipes to reduce the risk of basements being flooded when these pipes burst.

Improving water supply reliability: Improving the water network to protect customers from unacceptable interruption to their water supply of longer than 2 days once in a lifetime.

Please see the Appendix for all stimulus shared.

Followed by four enhancements relating to wastewater and rivers. Wastewater only customers only saw these enhancements

Reducing sewage flooding from very heavy storms: Improving the sewer network to reduce the chance of customers' properties being flooded by heavy storms that on average happen once in 50 years.

Reducing sewage spills into rivers*: Improving the sewer network to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.

Improving river health*: Improve the sewage treatment process to reduce the amount of extra nutrients, such as phosphorus, entering rivers and causing problems for plant life and wildlife.

Reducing carbon emissions: Reducing the amount of carbon emissions produced by Thames Water so that it is no more than the amount of carbon it removes from the atmosphere (Net Zero).

Please see the Appendix for all stimulus shared.
**Information was caveated with detail that the Government has set legal requirements for these areas with long-term targets and minimum short-term targets.*

Qualitative workshops show customers engage with the raising the bar enhancements, but lack in-depth understanding

Overall, customers are able to engage with the raising the bar enhancements, **understanding broadly what they mean and what they would include.** However, there are some limitations in this understanding:

Much of the information is new news, and therefore **customers do not necessarily have a pre-existing understanding of key aspects** e.g. what phosphorus is. This means that their understanding is often quite high-level and limited to what content was provided within the research.

Some also note that they **lack the technical expertise to comment on the enhancements** (i.e. how easy is this to do? Could two enhancements be done at the same time, to reduce time and cost?) and therefore feel confused as to why Thames Water is seeking customer feedback rather than consulting experts.

Many also **struggle more broadly to fully understand the difference between the improvements included within the core service and the 'raising the bar' enhancements,** which would be delivered **in addition to, not instead of**, the core service improvements*.

**To counter this, moderators continually addressed and re-explained this as required to customers. In later workshops, the core service improvements were left out on the tables for customers as a reminder. However, it meant that many customers questioned the branding of 'raising the bar' and whether activities should be considered as enhancement or standard operations.*

As with the general improvements, there is widespread concern from customers throughout workshops about the enhancements as a whole

Comparable concerns to general improvements

A **lack of contextual information*** on what each enhancement activity will look like and really mean for them (i.e. what are the targets benchmarked against? Why has Thames Water chosen these specific activities? Are they the most efficient way to achieve the overarching goal?)

The **targets feeling unambitious**, which is viewed even more negatively than general improvements given the language of 'raising the bar', which raises expectations of what Thames Water will deliver in each of these areas.

A **perception that Thames Water is being reactive rather than proactive.** In assessing the enhancements, customers feel they are forced to prioritise more urgent issues rather than considering long term needs.

Enhancement specific concern

A **misalignment between the challenges Thames Water faces and enhancement activities** (i.e. a lack or emphasis on preparing for population growth and climate change). This came out particularly strongly in the customer panel.

**Further information was not provided as doing so would have likely been too much information for customers. Where possible, Thames Water representatives answered key questions, however for some this further drove feelings of scepticism in the information and/or uncertainity about how they could best make a judgement.*

In assessing enhancements, customers in qualitative workshops consider both impact and how easy the process would be

The impact of the enhancement

- Customers balance the **impact on the individual** (and relevance to them personally) as well as **the broader impact on society.**
- **Some also consider which area will have the biggest impact on the most amount of people** with those seen as having a narrower focus, deemed less of a priority.

The perceived ease of implementing the enhancement

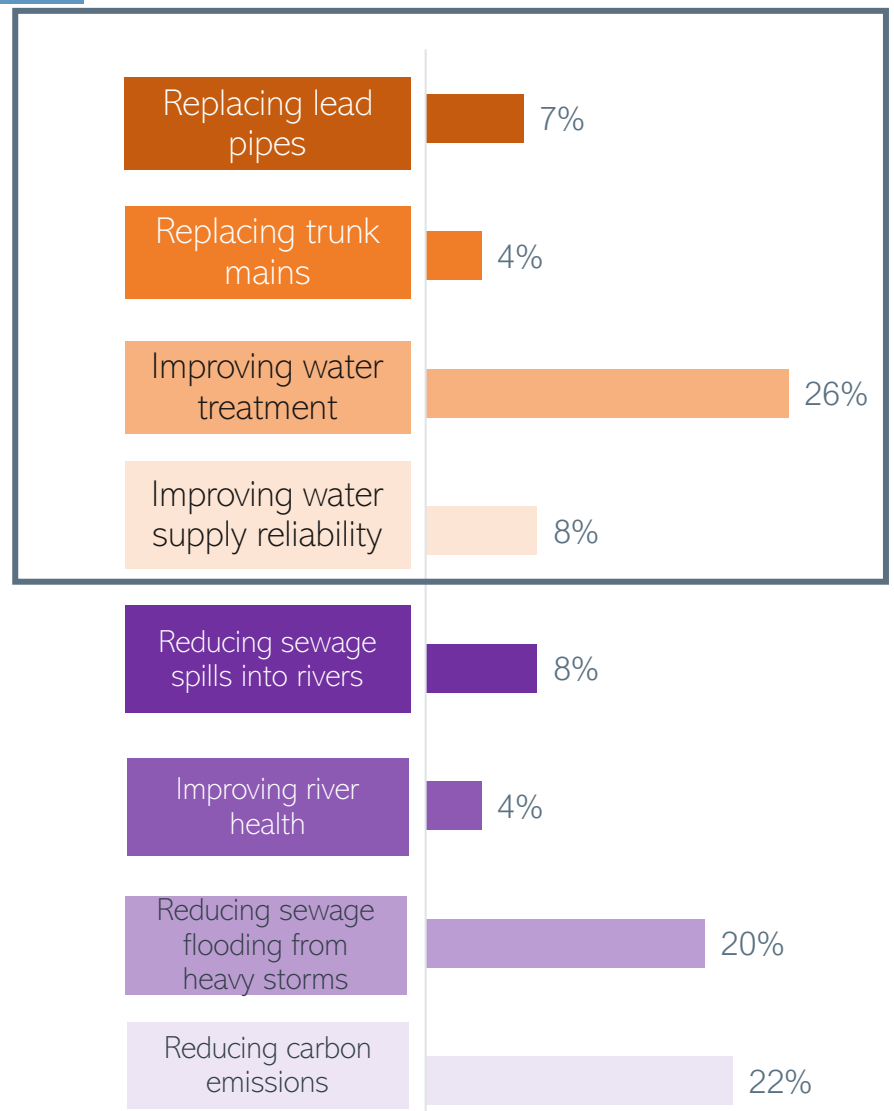
- Customers also consider how **straight forward they think the enhancement would be to enact,** including cost, time and the associated level of disturbance.
- Customers also make note of **which enhancements are inter-linked** and could therefore be **tackled in combination with one another** to reduce costs and time.

Please note, it is not possible to concretely explain how customers in the quantitative survey considered enhancements, but it is likely that their decisions were more instinctual, and perhaps more to do with what they want from Thames Water generally rather than what would qualify as a specific 'enhancement'.

Water enhancements

'Improving water treatment' enhancements are most likely to drive household and non- household customers to select a package

Household combined customers

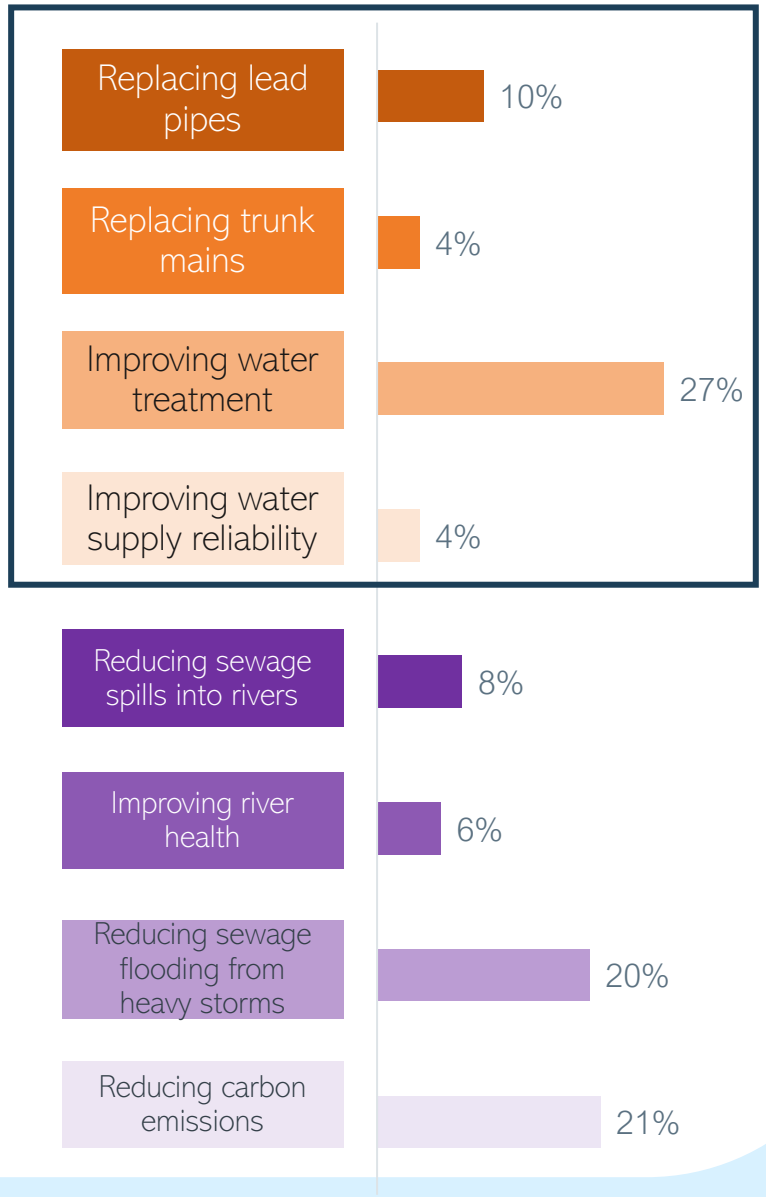


These are utility scores. They are not % of customers who would choose each area (that is shown in the slides that follow that compare packages using the simulator).

They show how important each enhancement area was in driving a customer to choose a package in the online survey trade-off exercise.

For example, changing the level of enhancement for 'Improving water treatment' in a package is more likely to drive a customer to choose a package than if you change the level of enhancement for 'Replacing trunk mains'.

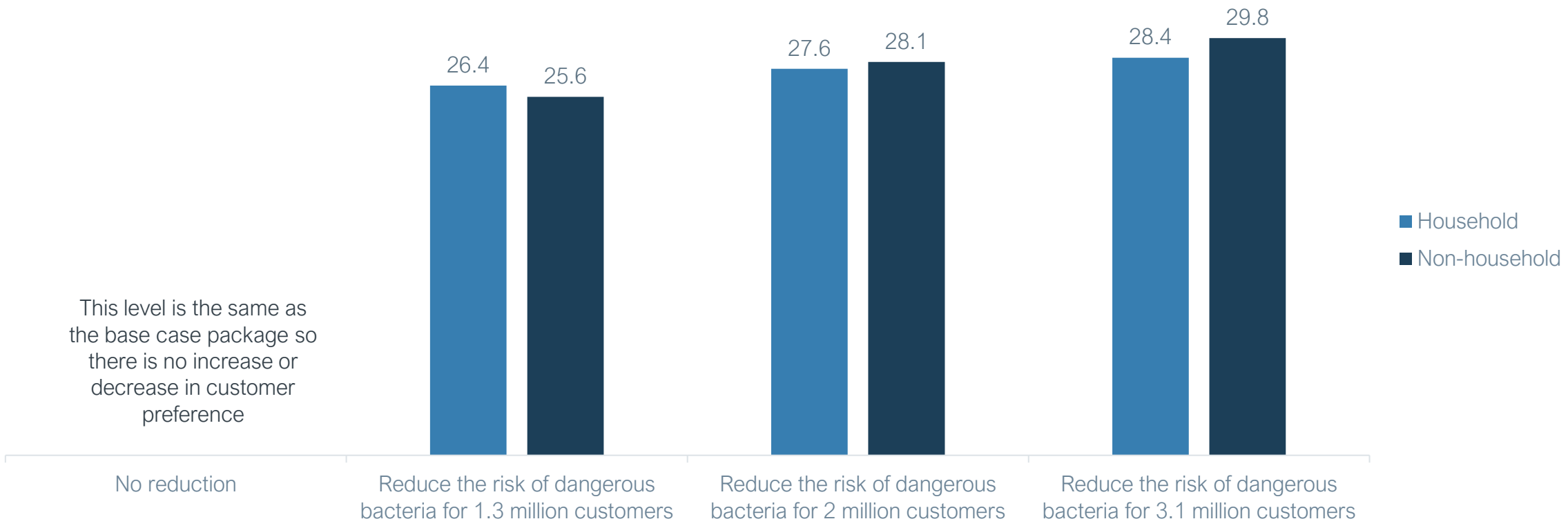
Non-household combined customers



Quantitative trade off exercise
Base: Household combined (n=640); Non-household combined (n=340)

Customer preference for a package increases by over 25% when enhancements are made to 'Improving water treatment'

Incremental gain in customer preference (%) when changing the improvement level of 'Improving water treatment' enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340)

‘Improving water treatment’ emerges as less of a priority qualitatively, however it is seen to be a ‘quick win’ for Thames Water

Initial reactions

- Hearing that there is a risk of water becoming contaminated by harmful bacteria is alarming to many customers and members of the customer panel. The solution is also seen as relatively straight forward.
- As such, customers feel this could be a ‘quick win’ for Thames as it is perceived to be a simple solution to a safety issue.
- However, in qualitative discussions some customers then more strongly recognise that the ‘quality of drinking water remains high’ as being key, which can lead them to deprioritising the enhancement.
- Beyond this, some customers also note feeling the focus on London water treatment is unfair, lacks explanation and raises concerns around the quality of water elsewhere.

Questions and / or concerns

- There are questions around how much of a ‘risk’ the bacteria poses to one’s health – without knowing this (as well as how far this risk would be mitigated if treatment plants were covered) some argue that it feels difficult to know whether it should be a priority.
- A lack of knowledge about what the process of ‘covering up water treatment works’ looks like prompts assumptions that this is a simple task and therefore raises questions around why this is not already done.

“This seems like a fair and easy thing to do, you wonder why they've taken until 2030 to put a roof on something. Why hasn't it been done already?”

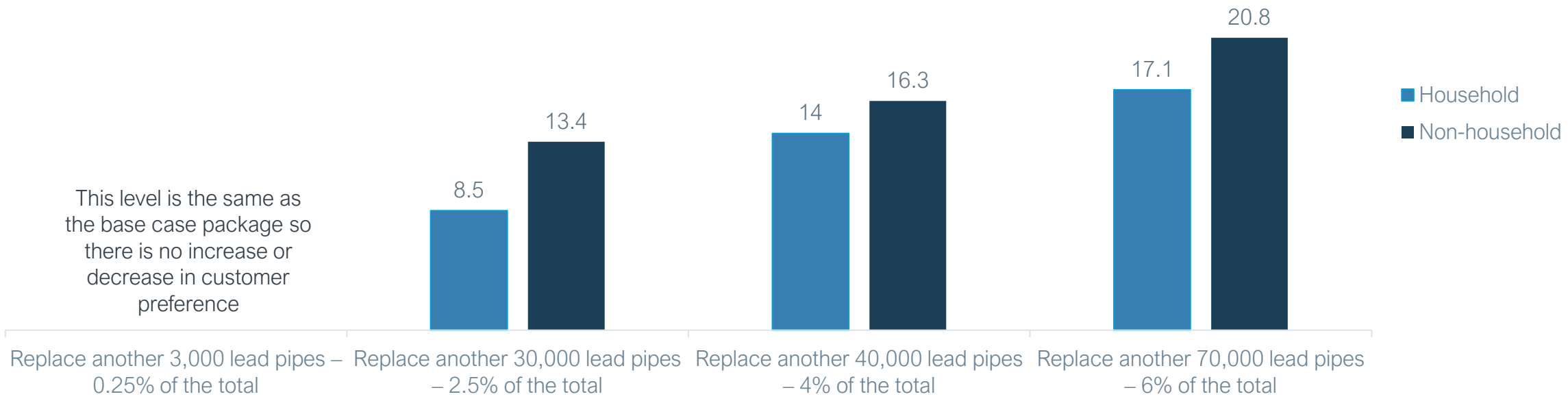
(HH Customer, Reading)

“If you see the public records, you don't see many problems related to water. It's quite common in countries where water is contaminated, you have people going to the hospitals with E.coli, it's not something that happens here.”

(HH Customer panel, London)

Enhancements to ‘Replacing lead pipes’ increase package preference to a greater degree among non-household, by up to 20%

Incremental gain in customer preference (%) when changing the improvement level of ‘Replacing lead pipes’ enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340)

This aligns with qualitative findings on 'Replacing lead pipes', with customers viewing this enhancement as a key priority. However, disruption is a concern

Initial reactions

- Customers start from a point of low-knowledge on lead pipes and are shocked to learn of the potential health risks of lead, particularly to young/unborn children. This leads to many naming it a top priority in qualitative discussions.
- There is a sense that raising the bar in this area could be a 'win-win' on an individual and societal level – protecting customer health *and* replacing the ageing infrastructure (which could reduce leakage).
- In qualitative workshops, some note wanting to see a more ambitious target (e.g. reaching the 2050 goal in 10 years) and targeting of vulnerable groups. For NHH customers in particular, this feels even more important given they have an added responsibility to keep their employees safe.

Questions and / or concerns

- There are concerns around the potential for disruption when replacing the pipes, particularly for some NHH customers.
- Many question what 'helping' schools would entail, with concerns that Thames would be placing the burden (financially and practically) on the schools.
- Some feel they need more information on the level of risk associated with lead, and are wary that it might have been 'blown out of proportion'.
- The customer panel in particular question what is replacing the lead, with concerns that if it is plastic this could cause health issues relating to microplastics.

"In 8 years time, with 6% transformation taking place, we won't even have half the pipes done by then."

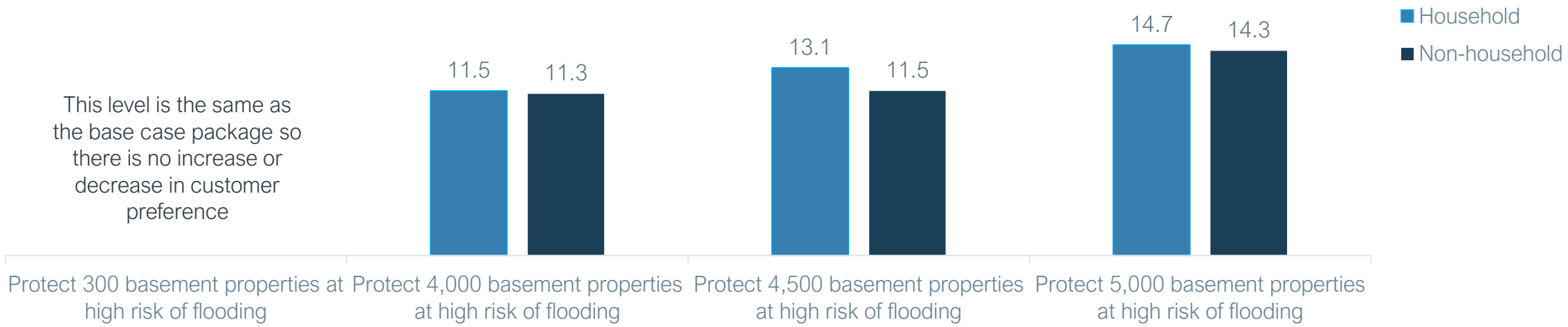
(HH Customer panel, London)

"There is that health risk with lead, and we do have better materials now, so it needs to happen. And the faster, the better. Particularly around schools."

(NHH Customer, Reading)

Enhancing ‘Replacing trunk mains’ increases package preference by 11%, but increasing levels has a relatively small incremental gain

Incremental gain in customer preference (%) when changing the improvement level of ‘Replacing trunk mains’ enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340)

Qualitatively, 'Replacing trunk mains' (and infrastructure more broadly) is welcomed. However, some question whether this is a top enhancement priority

Initial reactions

- As shown quantitatively, customers overall are favourable of this enhancement.
- However, the strength of this favourability is mixed depending on the customer location (i.e. London vs non-London) and whether the customer prioritises individual or societal benefits.
- For some, the impact feels narrow and unfair, with potentially limited benefit (i.e. those in London and with basements whom some presume are therefore more 'wealthy').
- Others feel resolving this issue could have long-term societal benefits in terms of reducing wastage and future-proofing Thames Water's systems.

Questions and / or concerns

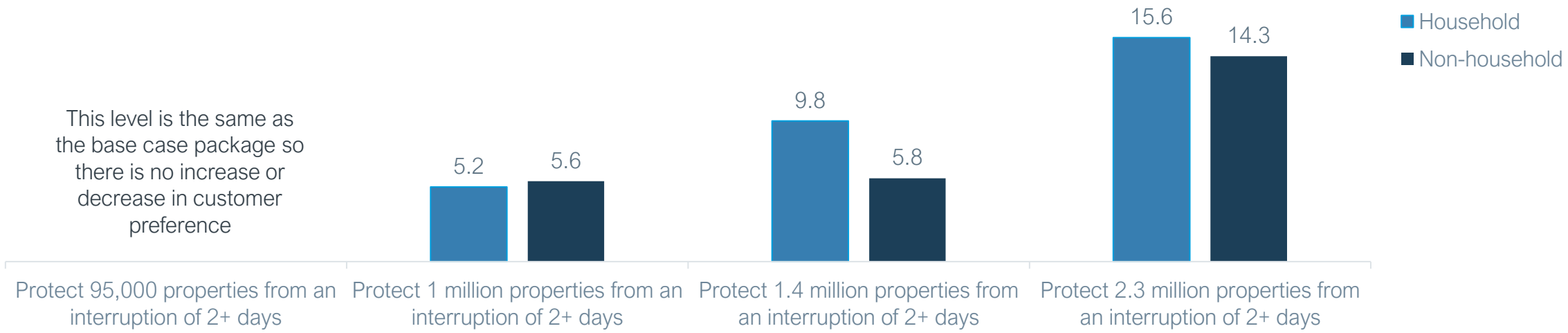
- Some (particularly those based in Reading) are put off by the idea of the 14% going on resolving a "London-issue" rather than a "Thames Water region issue".
- There are questions around whether this would cause more disruptions to supply and to local areas.
- A few would like to know more about how high the risk is before they are able to make a judgement.

"It feels as though it's more of a London area. We're paying for the older properties in London rather than spending money on our area, doing the lead pipes so that youngsters aren't damaged."
(HH Customer, Reading)

"Old ones are going to burst at some point. They need to be proactive. What if loads of them burst at once? They should have a rolling programme to replace old pipes - when they do burst we lose millions of gallons to waste."
(HH Customer, London)

‘Improving water supply reliability’ has a smaller impact on customer preference for a package, relative to other water enhancements

Incremental gain in customer preference (%) when changing the improvement level of ‘Improving water supply reliability’ enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340)

This is reflected in qualitative discussions, with many seeing 'Improving water supply reliability' as an inconvenience rather than a real risk

Initial reactions

- Customers are initially positive to hear that:
  - Water companies are working together to resolve issues around water reliability
  - The 2.3 million target feels impressive and ambitious
  - Thames are being proactive
- However, for most this is not a risk they are particularly concerned about it. It is seen as an 'inconvenience' rather than 'life threatening', making it less important compared to areas with risks to safety (e.g. lead pipes or water treatment).
- Some groups see this as a higher priority i.e. those who have experienced supply issues in the past, those with long-term health conditions, those with young children and non-household customers who would have to shut down (and lose revenue) if they had no water.

Questions and / or concerns

- Some question whether this is more of an issue to consider in the future given the current and imminent health risks outlined in other areas.
- There is a desire for more explanation and clarity around how water suppliers could work together and whether there would be any impact on how bills were processed I.e. whether their bill would still come from their own supplier and if the amount would remain the same.
- Some feel this could be achieved as a consequence of other, more important, actions (i.e. replacing trunk mains and lead pipes).

"You just make do - two days would be inconvenient, but you can cope. I don't think it's a big enough issue to warrant a lot of money going into it."

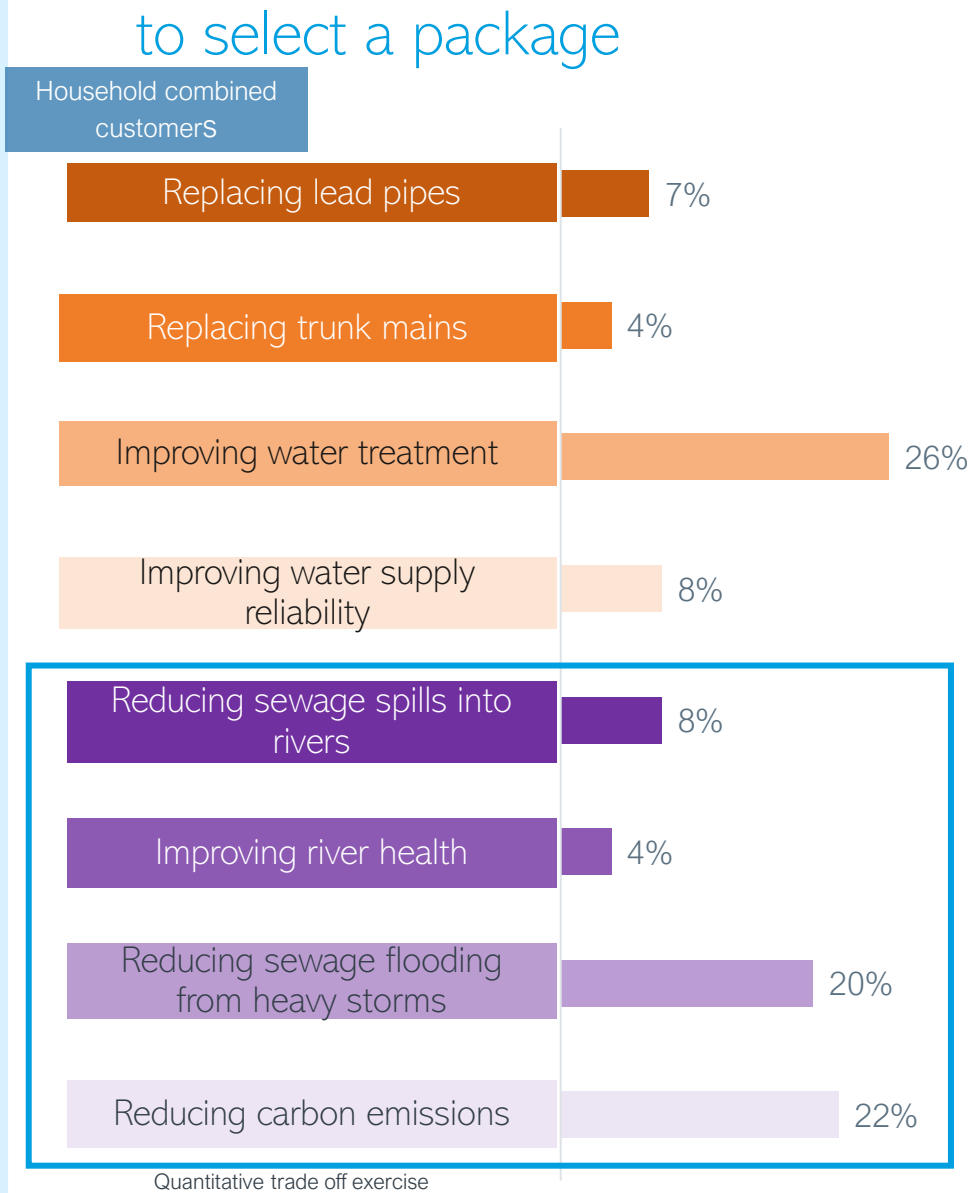
(HH Customer, Reading)

"The flat underneath me, their water was gone for three days. I didn't mind letting them use the shower. This one isn't as important to me. It's not life-threatening."

(HH Customer, London)

Wastewater enhancements

‘Reducing sewage flooding from heavy storms’ and ‘Reducing carbon emissions’ enhancements are most likely to drive household combined and non-household customers to select a package



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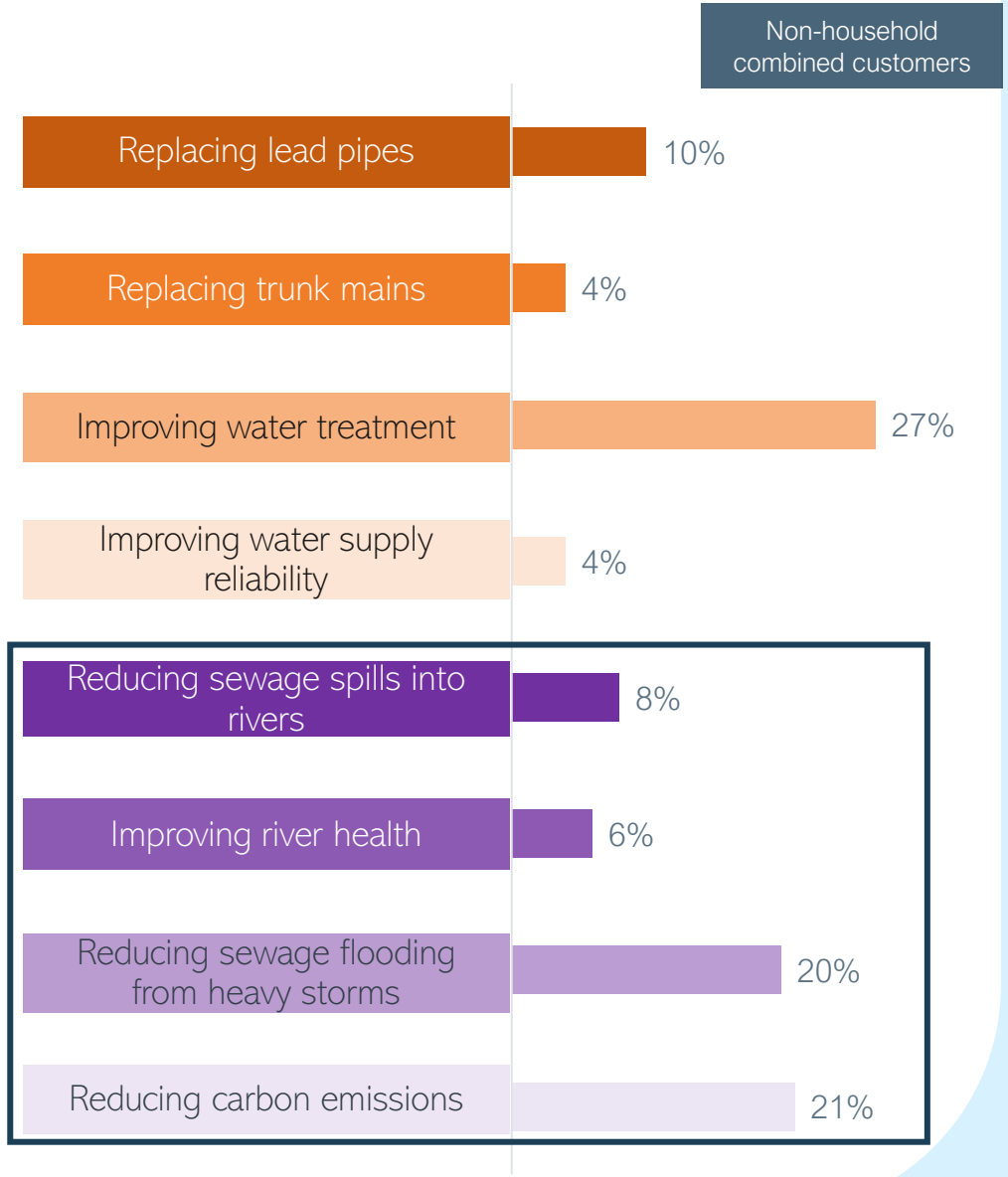
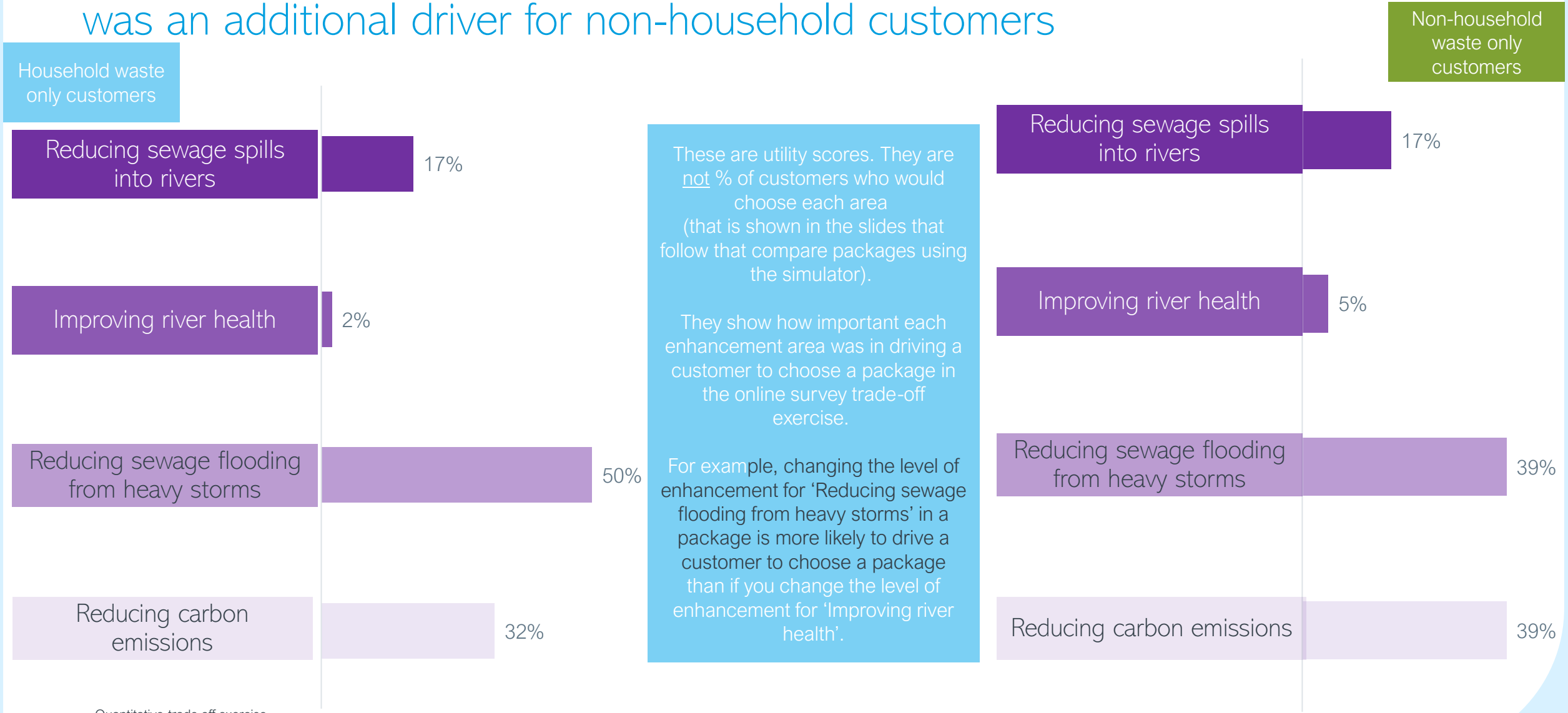
They show how important each enhancement area was in driving a customer to choose a package in the online survey trade-off exercise.

For example, changing the level of enhancement for ‘Reducing sewage flooding from heavy storms’ in a package is more likely to drive a customer to choose a package than if you change the level of enhancement for ‘Improving river health’.



Quantitative trade off exercise
Base: Household combined (n=640); Non-household combined (n=340)

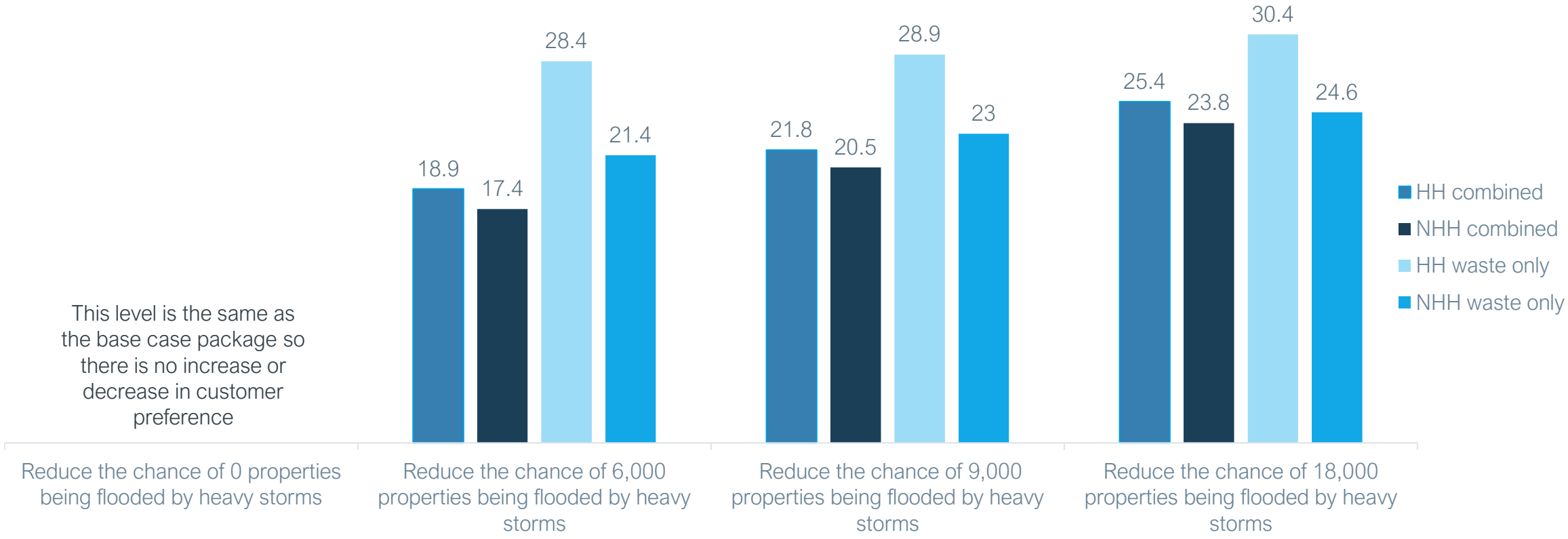
‘Reducing sewage flooding from heavy storms’ are most likely to drive customers to select a package. ‘Reducing carbon emissions’ enhancements was an additional driver for non-household customers



Quantitative trade off exercise
Base: Household waste only (n=360); Non-household waste only (n=160)

Customer preference for a package increases by roughly 20% or more when enhancing 'Reducing sewer flooding from very heavy storms'

Incremental gain in customer preference (%) when changing the improvement level of 'Reducing sewer flooding from very heavy storms' enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340), Household waste only (n=360), Non-household waste only (n=160)

However, in qualitative discussions, although recognised as a key issue, 'Reducing sewer flooding from very heavy storms' it is not universally prioritised

Initial reactions

- Sewage flooding is recognised as hugely impactful both personally (emotionally) and on homes. Broader concerns about climate change made this issue feel more likely in the future. Customers note that frequency of severe weather may increase and feel the proposed improvements are not enough.
- However, it is often deprioritised in qualitative discussions due to the smaller number of people affected by heavy floods.
- Furthermore, some argue that reducing sewage floods shouldn't be classed as 'raising the bar' as this should be part of standard service improvements.
- Customers often view this enhancement through the lens of personal experience. They feel it's of greater importance if they, or someone they know, have been impacted.

Questions and / or concerns

- There are questions around how many people would benefit from 'raising the bar' in this area, as it is seen as a relatively infrequent occurrence.
- There are also some concerns around whether the proposed solutions fully address the problem (e.g. focussing on rainwater, but not addressing other aspects such as blockages or education of users).

"I'm on the fence. I know it happens, but with the risk of flooding once in every fifty years - I know if it does happen it's a big thing, but it's not at the top."

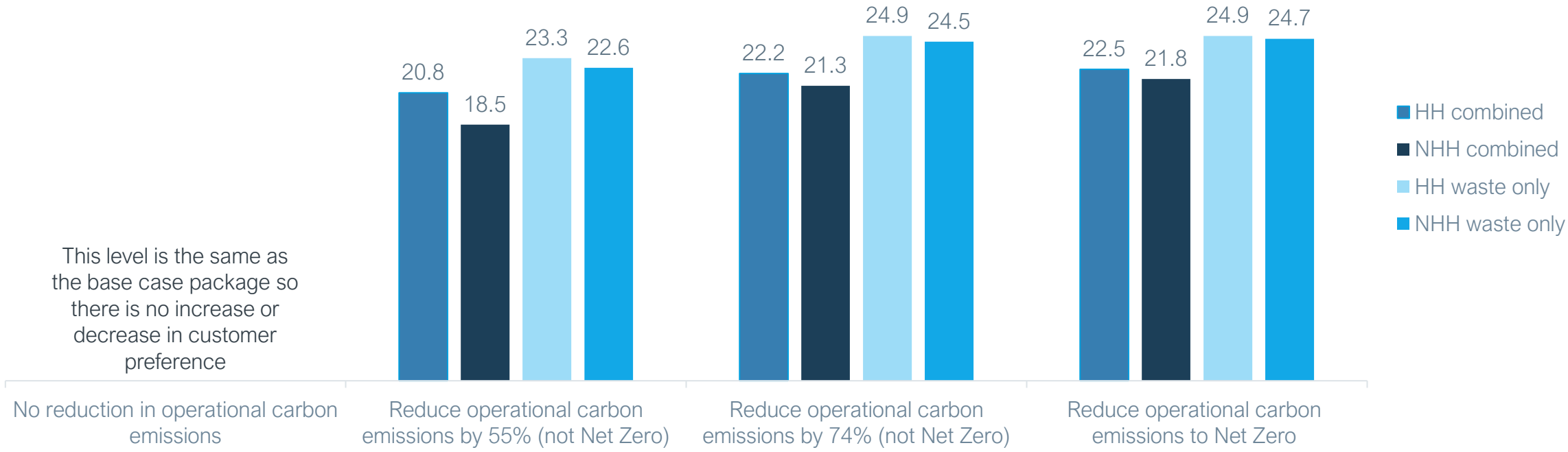
(HH Customer, London)

"I think building the nature based solution is very positive, it could actually do something about it. That to me seems like raising the bar, whereas just fixing the sewers seems to me like the core service."

(NHH Customer panel, London)

‘Reducing carbon emissions’ enhancements increase preference for a package by around 20% at the lowest level with a small incremental gain beyond this

Incremental gain in customer preference (%) when changing the improvement level of ‘Reducing carbon emissions’ enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340), Household waste only (n=360), Non-household waste only (n=160)

However, qualitative discussions reveal that some feel ‘Reducing carbon emissions’ should not be considered an ‘enhancement’ but a core service

Initial reactions

- Responses to this enhancement are mixed in qualitative discussions.
- Overall, reducing carbon emissions is deemed important. Non-household customers appreciate Thames Water working towards this goal, which they are also doing within their own businesses.
- However, for some there is a general sense this goal should be woven into operational costs, not ‘raising the bar’.
- Furthermore, there are questions as to why this is framed as an option as Net Zero is mandatory.
- Some also feel Thames Water could have greater environmental impact by focussing on rivers as opposed to emissions.

Questions and / or concerns

- There are questions around how much impact Thames Water can have on a large, global issue.
- There is also some scepticism around ‘green washing’ (companies claiming to be acting in an environmentally friendly way but not actually doing so) and whether the money will really be spent on these ‘raising the bar’ activities.
- There is also confusion as to why this is listed as a specific wastewater activity, as it impacts all areas of the business.

“All of this will take investment to achieve, probably a large amount of the 14% of money allocated [for improvements]. I'm not sure it is feasible.”

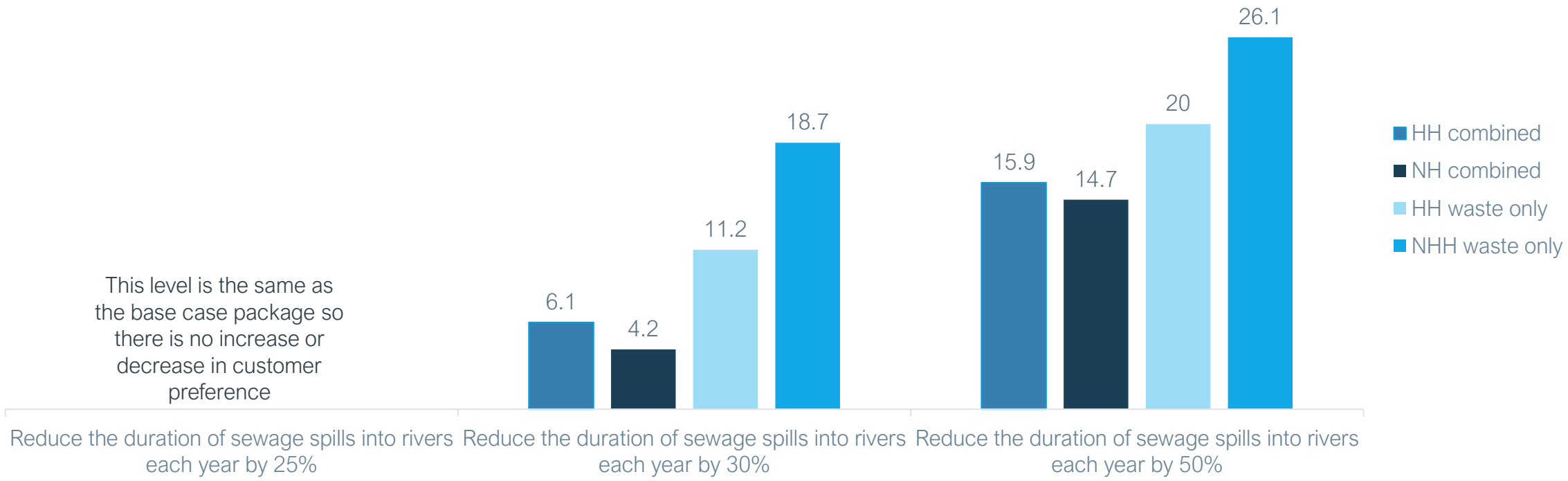
(HH Customer, London)

“I think reducing carbon emissions, you kind of expect that from all companies nowadays. It's something you hear a lot about.”

(HH Customer, Reading)

‘Reducing sewage spills into rivers’ has a relatively low impact on package preference, however it could increase non-household preference by up to 26%

Incremental gain in customer preference (%) when changing the improvement level of ‘Reducing sewage spills into rivers’ enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340), Household waste only (n=360), Non-household waste only (n=160)

‘Reducing sewage spills’ emerges as a higher priority in qualitative discussions than in the quantitative, with many deeming it urgent and fundamental

Initial reactions

- Some came to qualitative workshops with this concern already in mind, likely driven by media reports at the time of the research. The concerns are focused around:
  - The high frequency of spills
  - The impact on the environment
  - Children swimming in rivers
- Some feel the amount of spills speaks to poor infrastructure. They therefore feel that infrastructure must be prioritised along with reducing sewage spills to be successful.
- Customers draw comparisons between sewage spills into rivers and sewage flooding into homes, and typically prioritise the impact on nature over the proportion of homes impacted by flooding.

Questions and / or concerns

- For many this improvement felt significant, but the target of reducing spill duration is less meaningful than overall reduction.
- Opinions about the target are mixed – some feel reducing by 50% by 2030 is a good goal, some feel it isn’t far reaching enough, and others feel it is unachievable in the time frame.
- There are also concerns over whether the proposed solutions (e.g. reducing misconnections) are the most effective and what else can be done (e.g. improving cleaning methods).

“I think this is the priority. This would be my number one, over everything.”

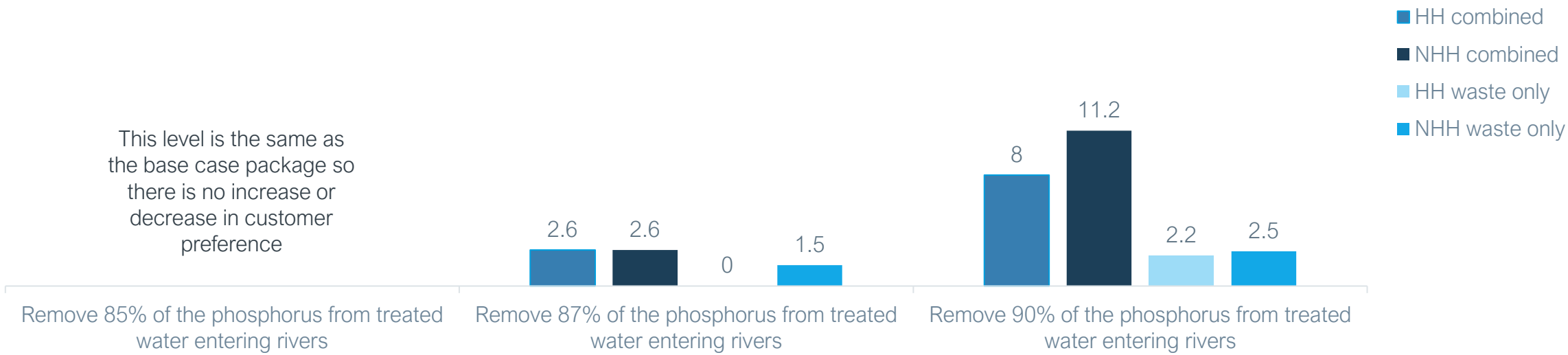
(HH Customer, Reading)

“I think the infrastructure is the most important part. In Newbury, we must have doubled or tripled in size, but our sewerage is exactly the same size it was.”

(NHH Customer, Reading)

‘Improving river health’ does little to increase customer preference for a package

Incremental gain in customer preference (%) when changing the improvement level of ‘Improving river health’ enhancement in a package where nothing else changes, and against the base case package.



Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340), Household waste only (n=360), Non-household waste only (n=160)

Qualitatively, customers are more favourable about 'Improving river health', however there are mixed views on whether it should be a core investment

Initial reactions

- Some people are not interested in 'raising the bar' in this area – they feel removing 75% of phosphorus as a standard improvement is enough.
- However, a few are passionate about the need to improve river health further and recognise the importance of clean rivers in terms of the entire water cycle.
- Some feel this improvement would be an indirect consequence of other improvements, such as reducing sewage spills, and therefore place this lower in importance than reducing spills.

Questions and / or concerns

- Questions are raised regarding how easy it is to get to 90% phosphorus removal - is it possible to get to this level without 'raising the bar', or could Thames take it even further to 100%?
- A key watch out is the potential lack of understanding amongst customers – in qualitative sessions most had not heard of phosphorus or weren't aware it's in rivers. Although this was clarified by moderators, it can make individuals both more fearful about the risk, and / or less engaged about the enhancement.
- There are also questions around how this goal aligns with other river cleaning or polluting activities (e.g. farmers dumping waste into rivers).

"The target of 75% by 2025 is really good, and 90% by 2030 shows that they're working their way to improving that in a reasonable time."

(HH Customer, London)

"It's a very impressive figure, the 90%. To go as far as 90% in that timescale, I would be very happy."

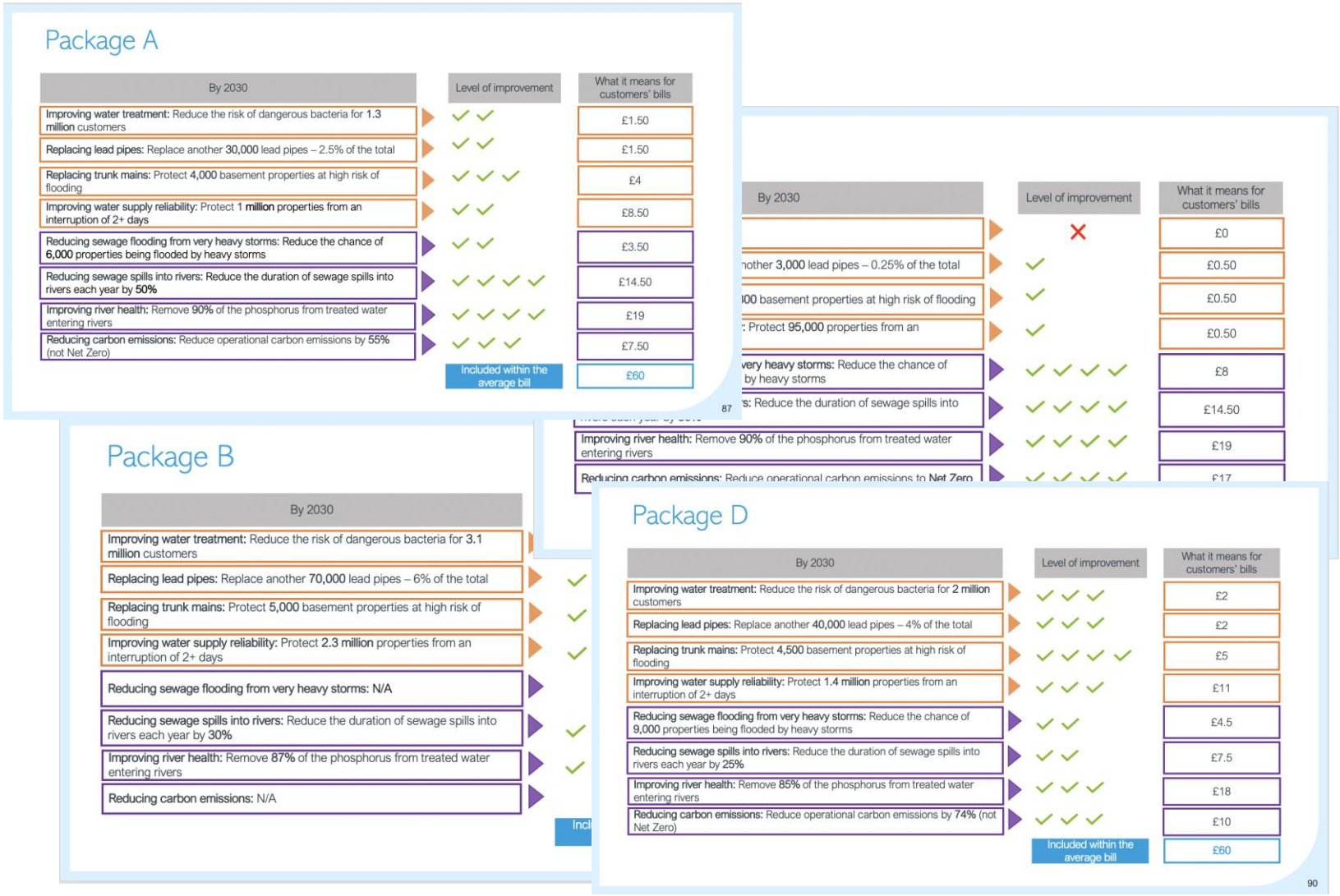
(HH Customer panel, London)

Assessing enhancement packages

Finally, customers were shown a series of different enhancement packages to review

In qualitative workshops, customers were shown packages with bill impacts. For combined customers, these were equal and fixed, whilst for wastewater only customers these were variable. They were shown the enhancement areas first and then bill impacts were revealed.

Quantitatively, customers were not shown package costs because during the trade-off exercise cost was omitted as there was a risk it would dominate the trade-off exercise and potentially lead to flat data, meaning it would not be clear which enhancement areas are more or less important or preferred by customers.



Please see the Appendix for all stimulus shared.

In assessing enhancement packages, in qualitative workshops customers draw upon several key viewpoints

A desire to see as many enhancements as possible shown in the package.

Customers generally struggle to omit many enhancements from the packages due to **a perception that most are, at least to some degree, important**. Some feel that all enhancements should be included, and **so lean more towards packages that have representation of all areas** and reject those that do not.

Emphasis on the now, rather than on the future.

Customers perceive there to be **many large scale issues that require urgent attention** by Thames Water. They therefore place less emphasis on enhancements that they see more as being an issue for the future, feeling that they **do not have the luxury of future planning** with so many present day problems to address.

A need to balance impact with cost (wastewater only*).

Customers do want to see Thames Water make improvements to their services, however **they are also highly money sensitive** given the current cost of living crisis. Many waste only customers are therefore influenced by the variable bill impacts of the packages shown. **They often favour packages 'in the middle' of the cost range that are felt to balance improvements with bill impact.**

**In qualitative workshops, waste only customers were shown packages with variable bill impacts. They were shown the enhancement areas first and then bill impacts were revealed.*

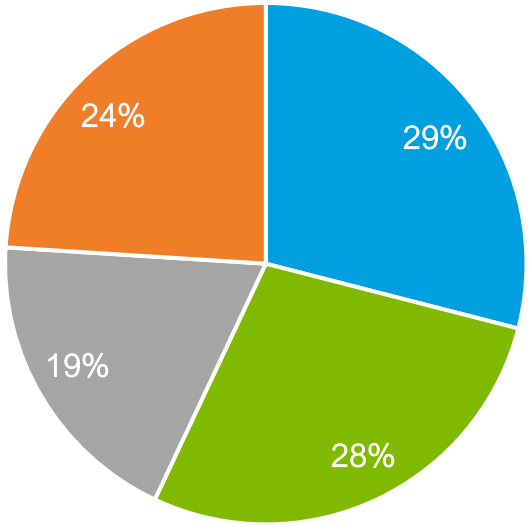
Combined package feedback

Please note NHH customers were shown packages with bill impacts as percentages due to the variation in their annual bill amounts. All stimulus can be found in the Appendix of the full report.

Packages A and B are most preferred by both household and non-household customers, with B standing out for non-household

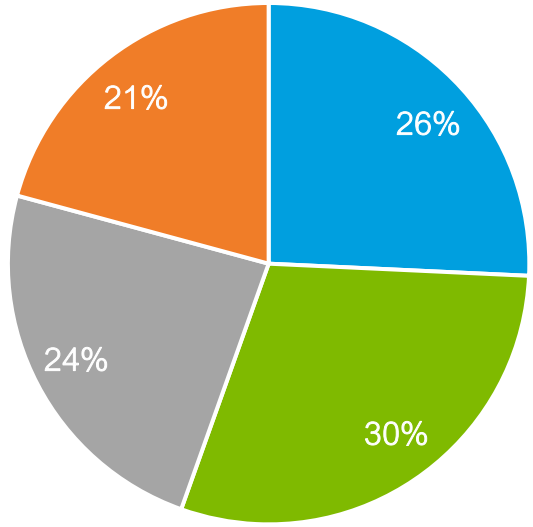
Combined package preference when compared to each other in the simulator

Household



Package A Package B Package C Package D

Non-household



Package A Package B Package C Package D

All 4 packages were entered into the simulator to compare with each other, rather than comparing with the base case package as in previous sections.

Quantitative trade off exercise
Base: Household combined (n=640), Non-household combined (n=340)

Package A is well received for being a 'well balanced' package that places some emphasis on waste

Preference compared with base case package

86%	86%
Household	Non-household

Many customers like that all enhancements are included within this package. This gives them confidence that nothing is being ignored or forgotten.

Emphasis on reducing spills – and for some, improving river health – in this package is well liked among those who feel these areas are a priority. However, the bill impacts associated with them are seen as high compared to others.

London customers like the emphasis on replacing trunk mains, however Reading customers are less favourable towards this.

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **1.3 million** customers	✓ ✓	£1.50
Replacing lead pipes: Replace another **30,000** lead pipes – 2.5% of the total	✓ ✓	£1.50
Replacing trunk mains: Protect **4,000** basement properties at high risk of flooding	✓ ✓ ✓	£4
Improving water supply reliability: Protect **1 million** properties from an interruption of 2+ days	✓ ✓	£8.50
Reducing sewage flooding from very heavy storms: Reduce the chance of **6,000** properties being flooded by heavy storms	✓ ✓	£3.50
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **50%**	✓ ✓ ✓ ✓	£14.50
Improving river health: Remove **90%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	£19
Reducing carbon emissions: Reduce operational carbon emissions by **55%** (not Net Zero)	✓ ✓ ✓	£7.50
	Included within the average bill	£60

"I think the price of it, it's taking it a bit too far. It's about whether they would match it, if we put 40 in would they also put 40 in?"

(HH Customer, Watford)

"A lot of the budget is on the environment rather than the initial fixing for the customer, but we also thought once the environment was sorted then those things at the top would probably sort themselves out."

(NHH Customer, Reading)

Although popular quantitatively, Package B is somewhat polarising in qualitative discussions

Preference compared with base case package

82%	82%
Household	Non-household

Many like how well water enhancements and key wastewater enhancements are prioritised in this package. They feel this gives the package a clear focus.

The omission of reducing sewage flooding receives mixed feedback: this is less popular among London customers, but deemed acceptable by many in Reading.

Similarly reducing carbon emissions is polarising: some (esp. non-household customers) see it as crucial given it is a Government requirement. Others feel this means it should be part of Thames Water's core services and not sold as an enhancement.

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **3.1 million** customers	✓ ✓ ✓ ✓	£3
Replacing lead pipes: Replace another **70,000** lead pipes – 6% of the total	✓ ✓ ✓ ✓	£3.50
Replacing trunk mains: Protect **5,000** basement properties at high risk of flooding	✓ ✓ ✓ ✓	£8.5
Improving water supply reliability: Protect **2.3 million** properties from an interruption of 2+ days	✓ ✓ ✓ ✓	£18
Reducing sewage flooding from very heavy storms: N/A	✗	£0
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **30%**	✓ ✓ ✓	£8.50
Improving river health: Remove **87%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	£18.50
Reducing carbon emissions: N/A	✗	£0
	Included within the average bill	£60

"I very much like this package. For 4 ticks where it's mostly urgent, and where they will reduce spillage into rivers, that's good. If we get this right, carbon emissions can be the next priority!"

(HH Customer panel, London)

"It's concentrating efforts. If you spread yourself too thin nothing is really going to be hit because there's no real focus."

(NHH Customer, Reading)

Package C is less well liked due to the perceived de-prioritisation of water enhancements

Preference compared with base case package

84%	81%
Household	Non-household

This package receives less positive feedback due to its emphasis on wastewater enhancements ahead of water.

This is more strongly disliked among customers who feel that reducing carbon emissions should not be considered an enhancement or improvement of any kind, but part of Thames Water's core business services.

However, customers are positive about the emphasis on sewage spills. Some are also pleased to see sewage flooding well represented in the package.

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: N/A	✗	£0
Replacing lead pipes: Replace another **3,000** lead pipes – 0.25% of the total	✓	£0.50
Replacing trunk mains: Protect **300** basement properties at high risk of flooding	✓	£0.50
Improving water supply reliability: Protect **95,000** properties from an interruption of 2+ days	✓	£0.50
Reducing sewage flooding from very heavy storms: Reduce the chance of **18,000** properties being flooded by heavy storms	✓ ✓ ✓ ✓	£8
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **50%**	✓ ✓ ✓ ✓	£14.50
Improving river health: Remove **90%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	£19
Reducing carbon emissions: Reduce operational carbon emissions to **Net Zero**	✓ ✓ ✓ ✓	£17
	Included within the average bill	£60

"I cannot believe there is nothing for water treatment! That's an immediate no! That is neglecting health."

(HH Customer panel, London)

"It's important to think about cause and effect. Improving [water supply areas] will affect the waste water problems. If you do Package C you are just increasing the bill further downstream."

(HH Customer, London)

Package D is again well liked due to its balanced inclusion of all enhancement areas

Preference compared with base case package

86%	85%
Household	Non-household

This package is particularly well liked among those who wish to see all enhancements represented. It is seen to be well balanced across all areas.

London customers are more positive about the high emphasis on replacing trunk mains, however Reading customers are less favourable due to a lack of personal relevance.

Most customers like the balance between personal and societal impact in this package. However, others worry about inefficiency if the money is spread across too many categories.

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **2 million** customers	✓ ✓ ✓	£2
Replacing lead pipes: Replace another **40,000** lead pipes – 4% of the total	✓ ✓ ✓	£2
Replacing trunk mains: Protect **4,500** basement properties at high risk of flooding	✓ ✓ ✓ ✓	£5
Improving water supply reliability: Protect **1.4 million** properties from an interruption of 2+ days	✓ ✓ ✓	£11
Reducing sewage flooding from very heavy storms: Reduce the chance of **9,000** properties being flooded by heavy storms	✓ ✓	£4.5
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **25%**	✓ ✓	£7.5
Improving river health: Remove **85%** of the phosphorus from treated water entering rivers	✓ ✓ ✓	£18
Reducing carbon emissions: Reduce operational carbon emissions by **74%** (not Net Zero)	✓ ✓ ✓	£10
	Included within the average bill	£60

"This improves the system as a whole. The system is more efficient. You can't neglect one side for the other. You need a balance."

(HH Customer, London)

"The budget has to be done across all objectives equally. All avenues are being approached, and if you are trying to do the best on every account, that is the right approach to take."

(HH Customer, Watford)

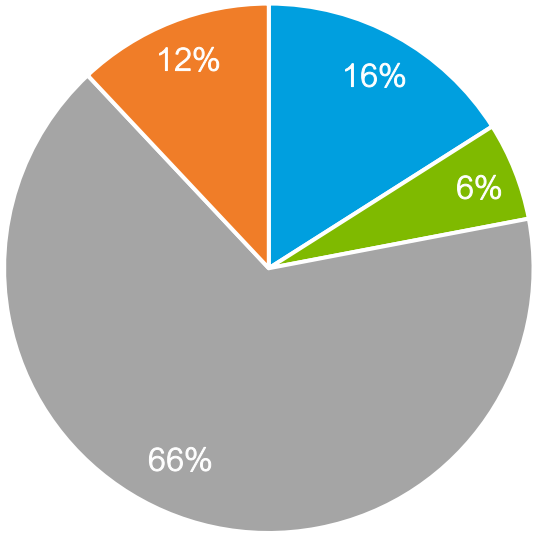
Wastewater only package feedback

Please note NHH customers were shown packages with bill impacts as percentages due to the variation in their annual bill amounts. All stimulus can be found in the Appendix of the full report.

For both household and non-household, Package C is most preferred when considering wastewater only enhancements

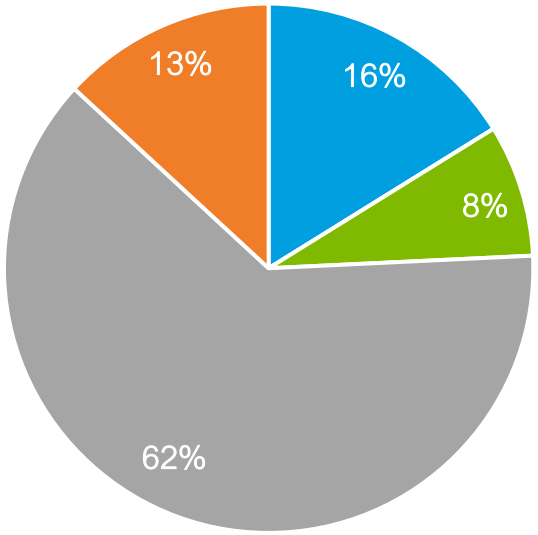
Wastewater only package preference when compared to each other in the simulator

Household



Package A Package B Package C Package D

Non-household



Package A Package B Package C Package D

All 4 packages were entered into the simulator to compare with each other, rather than comparing with the base case package as in previous sections.

Quantitative trade off exercise
Base: Household waste only (n=360), Non-household waste only (n=160)

Package A is appreciated for representing all enhancements with relatively good targets

Preference compared with base case package

85%	82%
Household	Non-household

Customers like that all enhancements are represented and targets are more ambitious than other packages. Qualitatively, there is an appreciation that emphasis is placed on reducing sewage spills, which is deemed the bigger priority enhancement area. Some also feel the same way about river health, although this is less consistent.

In qualitative discussions, customers are also relatively positive about the bill impact of this package, which is seen to be a fair 'middle ground' between the upper and lower end packages. However, some do note that it is still higher than they would like, particularly in comparison to Package D.

	Level of improvement	By 2030	What it means for customers' bills
Reducing sewage flooding from very heavy storms	✓ ✓	Reduce the chance of **6,000** properties being flooded by heavy storms	£3.50
Reducing sewage spills into rivers	✓ ✓ ✓ ✓	Reduce the duration of sewage spills into rivers each year by **50%**	£14.50
Improving river health	✓ ✓ ✓ ✓	Remove **90%** of the phosphorus from treated water entering rivers	£19
Reducing carbon emissions	✓ ✓ ✓	Reduce operational carbon emissions by **55%** (not Net Zero)	£7.50
		Included within the average bill	£44.50

"We agree, the £4.50 difference between A and D is not worth it. D looks the best. This was 15% more and the main thing was the net zero."

(HH Customer, Watford)

"I quite like A. If it [flooding] hasn't happened to you, you're less likely to care about it really. Whereas if you have been flooded a few times then you are going to care."

(HH customer, Watford)

Package B is received less favourably, and is even rejected by some for not covering all enhancements

Preference compared with base case package

61%	60%
Household	Non-household

Many customers immediately reject this package as it is only focused on two areas. These individuals feel all areas are important and should be covered by the packages to some degree.

Some customers, however, like that reducing carbon emissions is not included within the package. As seen elsewhere, they feel that this area should be part of Thames Water's core business and not an improvement or enhancement.

However, in qualitative discussions customers are positive about the lower bill impact of this package.

	Level of improvement	By 2030	What it means for customers' bills
Reducing sewage flooding from very heavy storms	✗	N/A	£0
Reducing sewage spills into rivers	✓ ✓ ✓	Reduce the duration of sewage spills into rivers each year by **30%**	£8.50
Improving river health	✓ ✓ ✓ ✓	Remove **87%** of the phosphorus from treated water entering rivers	£18.50
Reducing carbon emissions	✗	N/A	£0
		Included within the average bill	£27

"Are there consequences if Thames don't meet targets? Package B is doing the basics, just at a lower cost."

(HH Customer, Watford)

"Why can't they say, 'We're going to spread the whole money out across 4 areas'?"

(HH Customer, Watford)

Package C is the most liked, although in qualitative discussions many reject the high price tag

Preference compared with base case package

87%	84%
Household	Non-household

Customers appreciate the more ambitious targets of this package, and the fact that all areas are well represented.

However, upon being shown the bill impact (in qualitative sessions only), many customers are then more negative about this package, feeling that in comparison to others it is too much to be asking customers to pay. Here customers frequently reference the cost of living crisis, which is felt to be a concrete reason to aim to keep customer bills as low as possible.

	Level of improvement	By 2030	What it means for customers' bills
Reducing sewage flooding from very heavy storms	✓ ✓ ✓ ✓	Reduce the chance of **18,000** properties being flooded by heavy storms	£8
Reducing sewage spills into rivers	✓ ✓ ✓ ✓	Reduce the duration of sewage spills into rivers each year by **50%**	£14.50
Improving river health	✓ ✓ ✓ ✓	Remove **90%** of the phosphorus from treated water entering rivers	£19
Reducing carbon emissions	✓ ✓ ✓ ✓	Reduce operational carbon emissions to **Net Zero**	£17
		Included within the average bill	£58.50

"We prefer to go with this one because it is long sighted and we would prefer to pay more now to benefit future generations."

(HH Customer, Watford)

"It looks too expensive in comparison to anything else. It's not fair to ask everyone in the country to pay more – especially not low income families, especially in this climate."

(HH Customer, Watford)

Package D is viewed somewhat favourably, however targets are felt to lack some ambition

Preference compared with base case package

83%	79%
Household	Non-household

As with Package A, customers are appreciative that all enhancements are represented in this package and targets are viewed relatively positively.

Furthermore, in qualitative discussions they are relatively positive about the bill impact, which again is seen as a 'middle ground' between the lower and higher priced packages.

However, some customers do note that none of the targets are felt to be particularly ambitious collectively. This is seen to result in a small amount of progress across them all, but a lack of real impact in any of them individually.

	Level of improvement	By 2030	What it means for customers' bills
Reducing sewage flooding from very heavy storms	✓ ✓	Reduce the chance of **9,000** properties being flooded by heavy storms	£4.50
Reducing sewage spills into rivers	✓ ✓	Reduce the duration of sewage spills into rivers each year by **25%**	£7.50
Improving river health	✓ ✓ ✓	Remove **85%** of the phosphorus from treated water entering rivers	£18
Reducing carbon emissions	✓ ✓ ✓	Reduce operational carbon emissions by **74%** (not Net Zero)	£10
		Included within the average bill	£40

"I think with D you think at least something isn't getting cut, they're all getting done just not hugely. It's got to come from somewhere, at least it isn't the biggest cost jump."
(HH Customer, Watford)

"This one is too weighted toward carbon emissions."
(NHH customer, Watford)

Meeting Ofwat's minimum standards

Research approach: Strengths (1/3)

A mixed method approach	This provided both quantitative robustness with qualitative exploration, giving us clarity on what customer enhancement priorities and preferences are, but also an understanding of overall perceptions of 'raising the bar', the perceived pros and cons of each enhancement and the potential implications of undergoing each enhancement. This also delivered two customer perspectives – the 'fresh' uninformed view from the quantitative (representative of the mass) and the informed view from the qualitative.
Materials adapted for different customers	To ensure that materials were relevant and accurate for the customers seeing them, adaptations were made to materials as required. This included, showing only wasterwater and river enhancements and packages to those who Thames' only provides wastewater services to, and making changes to language and package bill amounts in the qualitative sessions (to be bill percentages rather than an average bill amount) for NHH customers. We also took steps to ensure that materials were as clear and easy to understand as possible should individuals have lower reading comprehension, including cog testing materials ahead of fieldwork to identify any potential issues.
(Qual) A range of discussions and tasks to understand views	Throughout the course of the qualitative workshops, customers were given various pieces of information and stimulus to respond to. This was staggered to make it easier to engage with, and followed by exploratory discussions to gather their thoughts, for example on the different enhancements. A trade-off exercise was then also used to give more practical insight into their priorities and preferences. This combination of discussion tasks allowed us to dig further into their views.

Research approach: Strengths (2/3)

(Qual) The use of a pre-task ahead of qualitative workshops to provide foundational understanding	This meant that customers arrived with some basic understanding of the context of the research, including what Thames Water is, how it operates, and its key challenges. This not only provided baseline understanding but got some people thinking about the subject matter ahead of discussions in the workshops.
(Qual) In person deliberative events to discuss enhancements qualitatively	Conducting in person, deliberative research delivered many key benefits: • Ensuring the research itself was lively and dynamic, driving customer engagement and therefore interest in the subject matter. • Taking customers from uninformed to informed views, giving them a greater sense of the challenges Thames Water faces and 'short-cutting' to debates that could emerge in the future. • Allowing for deeper discussions between customers and with facilitators. • Allowing Thames Water representatives to be present to answer any questions from customers and deliver deeper understanding. • Giving customers adequate time to reflect on materials and learn more about the subject matter throughout the course of the event. • Allowing digitally disengaged and offline customers to participate in the research.
(Quant) Using an online survey	An online survey allowed us to reach a large number of customers in a short space of time and capture the views of a representative sample of Thames Water customers. This means we can be confident that the insights gained from the online survey are robust, representing the views of Thames Water customers, and can therefore be relied upon to use as evidence for Thames Water to make strategic business decisions.

Research approach: Strengths (3/3)

(Quant) Using a trade-off exercise with a conjoint design	A trade-off exercise ensured customers critically assessed the value they place on various levels of enhancement. This was particularly important for a low engagement topic such as water. A conjoint design for the trade-off exercise allowed us to identify the implicit preferences for each enhancement and different levels of enhancement within a package, as well as their relative importance in driving a customer to choose a package. Just asking customers to pick their preferred level of enhancement from a long list of enhancements would have been misleading as customers would have either asked for 'everything' which is unrealistic, or gradually disengaged due to the volume of information they had to consider at once. A conjoint design also enabled us to create a simulator with the research findings. The simulator allows us and Thames Water to simulate enhancement package scenarios and test these against each other to understand what customer preference would be (based on the data gathered from the online survey trade-off exercise).

Research approach: Limitations (1/3)

(Qual) Exploring complex issues within a limited timeframe	The 3 hour timeframe of workshops was specifically chosen to balance giving customers time and space to understand materials, while also ensuring energy and engagement could be maintained. However, ensuring that all customers had a thorough understanding of materials was a challenge, particularly the difference between the improvements included within the core service and the 'raising the bar' enhancements. Steps were taken to ensure comprehension, however this may have impacted some customer's ability to provide clear feedback.
(Qual) How questions were designed and directed	Questions did not directly explore affordability (of the core service improvements or raising the bar), nor did we provide the option to not 'raise the bar' at all and reduce bills overall. Not having these options may have biased responses, as it forced customers to select from the options presented when their preference may actually have been for no enhancements. However, some customer did still raise these points spontaneously, which has been referenced in the report.
(Qual) Having non-household and household customers in the same workshops	Tailored household and non-household stimulus were created, and non-household customers were on a separate break-out tables. However, as is inevitable, non-household customers often answered from a personal rather than business perspective and had to be guided accordingly. While this was more pronounced in the workshops, it was also present in the non-household only paired depths and overall, there was no noticeable differences in responses in the two settings. Given we also had more household customers overall, this means the findings are more skewed to household perspectives.
(Quant) Having a large amount of enhancement areas to include for each package in the trade-off exercise	Based on previous experience and best practice for trade-off exercises in online surveys, having eight attributes (enhancement areas) for combined customers would have been cognitively demanding for survey participants and risked disengagement and limited meaningful results from the trade-off exercise. As such, a partial profile trade-off exercise was used where combined customer participants only saw four attributes at once in each package to trade-off, but across each of the trade-off screens they saw all eight attributes in various package combinations.

Research approach: Limitations (2/3)

(Quant) The impact of price on the trade-off exercise	Based on previous experience of conducting trade-off exercises in online surveys, price is known to dominate trade-off decisions. The Thames Water enhancement packages tested in the qualitative research had a price attached to each level within each attribute, which if tested like for like in the quantitative survey would have risked a significant number of survey participants focusing on trading off the price of each level (rather than the level of improvement) and consequently choosing a package with the lowest combination of prices. This could have led to 'flat' data where preference differences between enhancement areas were minimal. To overcome this, we removed price from the enhancement packages tested in the quantitative online survey trade-off exercise. In the qualitative research price was included, with fixed package prices for the water and wastewater packages and variable prices for wastewater only. Due to the way the overall packages had to be constructed, it was not possible to create equal fixed price packages for wastewater enhancements. To reduce the impact of this, wastewater only customers were shown the enhancement areas first and then prices were revealed, to first gather their overall view independent of price. These different views have been clearly explained within the report.
A lack of independent review of materials ahead of fieldwork	Due to significant delays in gathering information required for the materials, there was a lack of time for an independent review (from BritainThinks and the CCG) ahead of fieldwork. This meant that while it was possible to make the most crucial changes ahead of fieldwork beginning (and cog testing took place to check comprehension), some issues (such as information on carbon emissions, (as detailed in the following slide) were only identified and corrected during qualitative fieldwork.
A lack of supporting information in the materials	Some customers wanted more detail (e.g. comparisons, level of risk, outcomes) on enhancements as well as additional contextual information (e.g. previous 'raising the bar' spending) which was not available to be provided, or was omitted so as not to overload customers with information, or show them information that wasn't relevant. This meant firstly that some felt sceptical about what information was being withheld, while others felt that they lacked the necessary information to make clear judgement on future improvements.

Research approach: Limitations (3/3)

Differences in results between the quant and qual	The quant and qual findings of this research do have some areas of difference. There are various specific reasons which may have caused this, which have been outlined throughout the report. Broadly speaking however, it is important to recognise how the different research approaches may result in different findings: within the qualitative sessions a deliberative approach meant that customers engaged more deeply with content (and specifically what an enhancement is). They also went on more of a journey with the information, often changing their views throughout the course of the workshop. In the quantitative research, responses were likely more instinctual and is likely to be representative of their core needs and requirements from Thames Water as a whole.

Research approach and materials: Improvements made

(Qual) Implementing cog testing findings	Prior to all fieldwork beginning, we cognitively tested all research materials with a group of customers to gather their feedback on the clarity and legibility of information. While no extensive re-writes were required, some changes including small scale wording changes and the inclusion of additional detail were made as advised.
(Qual) Streamlining materials	In our initial workshops, we recapped pre-task materials shown to make sure customers were familiar with the content. However, we found that customers had strong recall of this information and so removed this from later sessions. This left more space and time to discuss the future improvements and raising the bar enhancements.
Updating potentially confusing or misleading information	Two key issues with materials were identified which had to be corrected to ensure they were not misleading or confusing: • The CCG noted that some of areas of improvements described are statutory requirements of Thames Water, and therefore there was a risk of misleading customers by implying that they were optional enhancements. We amended the stimulus materials to make it clear that some of the enhancements and levels of improvement described were statutory requirements and not optional. Moderators also reiterated this information. • Secondly, there was some confusion in early qualitative workshops regarding detail on reducing carbon emissions, as the enhancement targets appeared to be lower than those shown in the improvements delivered as part of the core service delivery. ‘Help tackle climate change by becoming 'net negative’ was therefore removed as a core service improvement in materials for later workshops.

Research sample: Strengths, limitations and improvements made

Overall	
Broadly speaking, the research was inclusive with a broad range of individuals taking part. The full samples can be found on slides 17-19. Adaptations were made to ensure that individuals were comfortable and confident in taking part, including using accessible venues, providing calculators for the 'create your own package' exercise in qualitative workshops and taking steps to ensure that research materials including stimulus were written in language that was as clear and simple as possible.	
Limitations	
(Qual) Urban / rural representation	Urban representation in the qualitative sample was high compared to rural or suburban due to the workshops being in person, which meant central urban locations were selected. Those living in rural locations were not always willing or able to travel for fieldwork. This means the findings are more skewed to urban perspectives.
(Qual) Other potentially excluded groups	Although not directly excluded from the research through screening, it is possible that some individuals (such as those with social or mental issues, those who were more concerned about Covid-19, or those who speak English as a second language) will have been deterred from participating in the qualitative sessions when told what it would include (reading, a group environment engaging in complex ideas with others).
(Quant) Digitally disengaged	As the quantitative survey took place online, those who are digitally disengaged or not comfortable in using the internet were automatically excluded from this part of the research. However, the qualitative component was open to such individuals.
Improvements made	
(Qual) Ethnicity	Based on CCG feedback, we increased the ethnicity quotas in London to be more representative of the demographics of the city.

Reflections on the research approach in line with Ofwat's standards of high-quality research

Research principle	Further information
Useful and contextualised	Research had a clear purpose of informing Thames Water's PR24 enhancement plans and the report includes comparison with previous Thames Water research.
Neutrally designed	Research guides and questionnaires were designed by BritainThinks (independent research experts) to be neutral and free from bias, including avoiding leading questions and ensuring all participants could freely share their views. Stimulus was designed by Thames Water with feedback given by the CCG, BritainThinks and participants (through cognitive testing and the research itself) to remove misleading or confusing information. Reassurances were given throughout the research that no decisions had yet been made and Thames Water were open to hearing all views.
Fit for purpose	A deliberative approach was used to provide participants with information on key topics and allowed them to engage in a more meaningful way. Amends were made to the research following initial workshops to enhance the extent to which participants could engage with information e.g. cutting out unnecessarily information, printing out key slides. These learnings were then taken through to the quantitative phase. However, challenges were still faced in ensuring comprehension.
Inclusive	Research materials and the research itself were designed to be inclusive and accessible. The sample for the research included a wide variety of Thames Water customers. However, the in person nature of the fieldwork meant the qual sample was geographically limited to Watford, Reading and London (and mainly urban), and the quant limited to those who are online.
Continual	This research is part of Thames' ongoing programme of engagement, feeding into the development of Thames Water's PR24 Business Plan.
Independently assured	All research was conducted by BritainThinks, an independent research and insight consultancy.
Shared in full with others	The full report and stimulus materials will be shared with other South East England water companies via a SharePoint site (in development).
Ethical	All research conducted by BritainThinks is in line with the Market Research Society Code of Conduct.

How findings have been analysed (insight triangulation approach)

This research utilises data from two sources:

Quantitative survey; to identify customer enhancement priorities and package preferences.	Deliberative qualitative workshops; to explain views and perspectives of enhancements and packages.

Analysis of quantitative and qualitative data initially took place separately due to the different timings of each method.

- Quantitative: An Excel simulator was used to generate utility scores for each enhancement area from the online survey trade-off exercise (i.e. how important each area was in driving customer preference for a package in the trade-off exercise). The simulator was also used to create enhancement packages to see what % of customers would prefer packages and how many are gained or lost as you move up and down each enhancement level. This analysis was done for household and non-household customers and combined services and waste only customers. It allowed us to understand what packages and areas of enhancement are most preferred and what room there is for manoeuvre.
- Qualitative: Careful analysis took place of all workshops, including analysis of differences and similarities between household and non-household customers. To achieve this, all workshop facilitators were brought together to share findings for each enhancement and where possible, to determine priorities and preferences.

In bringing the two sources together, we broadly led with quantitative results for the main story of priorities and preferences. Here, quantitative data was more robust and conclusive. We then used qualitative results to explain rationale and provide detail. Where there was some misalignment between the quantitative findings and the qualitative, this was caveated / explained. Throughout the report, we have also compared findings to previous research conducted by Thames (What Customers, Communities and Stakeholders Want, August 2022).

Appendix:
Research materials

Qualitative screener

Household consumer experts

Thames Water | PR24 Options

Recruitment specification and screener | July 2022

3 x 3 hr in-person workshops
Recruit 58 customers (HH) across 3 locations of the Thames Water region, representative of a broad range of segments and situations **Customer experts for each location will take part in one 3hr f2f deliberative workshop and will become educated about the issues, to provide detailed feedback, but will represent a more mainstream customer audience)** **Workshops to take place:** • Short pre-read pre-task (shared via MS Forms) • Dates: on either Tues 26th, Wed 27th July or Wed 3rd Aug at 6 - 9pm **Locations** • Central London (venue tbc) • Reading (venue tbc) • Watford (venue tbc) **Incentive:** • £85 for 3hr f2f evening workshop

Demographic criteria

Central London (x19 HH)	Reading (x19 HH)	Watford (x20 HH)
Mix of gender (male/female/non-binary) **Min x7 Male** **Min x7 female**		
Mix of age: 2 x 16-18 yrs (future customers) 3 x 18-24 yrs (future customers) 3 x 25 - 34 yrs 3 x 35 – 44 yrs 3 x 45 – 54 yrs 2 x 54 – 64 yrs 3 x over 65 yrs	**Mix of age:** 2 x 16-18 yrs (future customers) 3 x 18-24 yrs (future customers) 3 x 25 - 34 yrs 3 x 35 – 44 yrs 3 x 45 – 54 yrs 2 x 54 – 64 yrs 3 x over 65 yrs	**Mix of age:** 2 x 16-18 yrs (future customers) 3 x 18-24 yrs (future customers) 4 x 25 - 34 yrs 3 x 35 – 44 yrs 3 x 45 – 54 yrs 2 x 54 – 64 yrs 3 x over 65 yrs
Mix of SEG Min x5 AB Min x5 C1 Min x3 C2 Min x3 DE		
Min x6 Ethnic minority	**Min x5 Ethnic minority**	

(All to be within the M25) Min x6 Rural	Min x6 Rural
Living situation Min x6 homeowner Min x6 private renters Min x6 Housing Association Aim for Local Authority	**Living situation** Min x5 homeowner Min x5 private renters Min x5 Housing Association Aim for Local Authority

Project-specific criteria

Central London (x19 HH)	Reading (x19 HH)	Watford (x20 HH)
mix of bill payers and TW consumers that don't actually pay the bill themselves.		
x19 Household Water and wastewater service customers		**x20 Household Wastewater customers only**
Min x8 Metered **Min x8 unmetered**		
Min x2 – 3 on priority services register **Don't exclude digitally disengaged**		

- **Additional, consent and permissions**
  - Permission to be audio recorded
  - Permission for client to be present
  - Permission for BritainThinks to store data
  - Permission to be re-contacted for further Thames Water research; including a potential debrief session with Thames Water Senior Board members
  - Permission for photographs and video to be taken at the session and used in reporting (which may be published)

Other requirements

- No participants to have taken part in research in the past 6 months
- No participants to have taken part in research on this topic before
- No participants to have taken part in the last round of this research
- No two participants to know each other
- No participants to have worked in listed occupations

SECTION 1: INTRODUCTION

Good morning/afternoon/evening,

I am looking to recruit people to take part in a research project. The research is being conducted by BritainThinks, an independent market research company, on behalf of the water company, Thames Water.

We are looking to speak to household customers across the Thames Water region. The research would consist of a small pre-task and an in-person evening session in a WATFORD/READING/LONDON location. You would receive a total of £85 (HH) as a thank you for taking part in the project and you will be paid in the days following the final workshop via Ayda, an independent payment platform.

The session will be on Tues 26th, Wed 27th July or Wed 3rd Aug at 6 - 9pm. It will take place in person and last 3 hours. In advance of the event, we will share pre task details via email.

Everyone taking part in the research will come from different backgrounds and will have a range of different experiences to talk about so don't worry, there are no 'right' or 'wrong' answers to the questions I am about to ask you.

Please note that if you do take part in this project, you will not be able to take part in any other BritainThinks research projects for the next 12 months. If you are interested in taking part, I just need to ask you a few questions.

SECTION 2: DECLARATION

Q1: I'm now going to ask you a range of questions about yourself and the work you do to understand if you are suitable to participate in this research. This will include questions about your ethnicity, health status and financial status. Are you happy to proceed on that basis?

Yes	Continue
No	**Thank & close**

Q2: Are you currently participating, or scheduled to participate in any market research?

Yes	**Thank & close**
No	Continue

Q3: Have you taken part in any market research before?

Yes	Go to Q4
No	Go to Q6

Q4: If yes, how many market research discussions have you taken part in, in the past 6 months? And in the past 12 months?

Past 6 months	**Thank & close**
Past 12 months	Record:

Q5: If yes, please list all topics covered in all previous market research discussions you have attended in the past 12 months

Record: Thank and close if attended any market research topic on water or utilities, in the past 12 months

Q6: Have you taken part in any research with BritainThinks in the last 12 months?

Yes	**Thank & close**
No	Continue

Q7: Have you ever taken part in any Thames Water research before?

Yes	**Thank & close**
No	Continue

Q8: Have you ever been employed in any of the following occupations?

Market Research	**Thank & close**
Marketing	
Journalism	
Media	
Water sector	
Thames Water	

SECTION 3: ABOUT YOU

Q9: How would you describe your gender?

Male	Recruit min x7 per location
Female	Recruit min x7 per location
Non-binary	Record

Q10: What is your age? (refer to location quota table on page 1)

16 – 18	Recruit 2 per location as future customers
18 - 24	Recruit 3 per location as future customers
25 – 34	Recruit 3 each for London + reading, recruit 4 for Watford
35 - 44	Recruit 3 per location
44 - 54	Recruit 3 per location
55 - 64	Recruit 2 per location
65+	Recruit 3 per location

Q11: How would you describe your ethnic background?
Do not read out list of options – code answer against the following so that participants can self-describe.

White British / White European / White other	Record
Mixed	Record and recruit: Min x6 London Min x5 Reading and Watford
Asian / Asian British	
Black / African / Caribbean / Black British	
Other (please specify)	

These groups are based on the 2021 census. If needed, a more detailed breakdown of groups can be found here.

SECTION 4: FINANCE

Q12: What is/was the occupation of the person in your household who earns/earned the highest salary? [If retired, occupation prior to retirement]

Write in

Q13: Record social grade
Answers used to inform financial vulnerability

A	Recruit, min x5 per location
B	Recruit, min x5 per location
C1	Recruit, min x3 per location
C2	Recruit, min x3 per location
D	
E	

Q14: Which statement best describes you?

I am a household Thames Water customer, and I am participating in this research on that basis	Recruit x 19 for both London & Reading Recruit x20 for Watford as HH customers and continue to Section 5
I am a non-household (business) Thames Water customer, and I am	Thank & Close (recruit for NHH sample)

participating in this research on that basis	

SECTION 5: LOCATION

Q15: Which best describes where you live? (All London to be within the M25)

Urban	Recruit mix
Semi-rural / suburban	
Rural	Recruit, min x6 per location

If clarification is needed:

- **Urban:** city / large town with population over 10,000
- **Small town / Suburban :** settlement of 3,000 to 10,000 people or less than 20 minute drive from an urban area
- **Village / rural:** settlement of less than 3,000 people / sparsely populated area / more than 20 minute drive from urban area

Q16: In what town, village or city do you currently live in?

Watford (or within reasonable travel distance)	Recruit x20 and continue to q17
Reading (or within reasonable travel distance)	Recruit x19 and continue to q18
Central London (or within reasonable travel distance – do not recruit outside of m25)	Recruit x19 and continue to q18

Q17: (For Watford only) Please confirm your postcode, so we can check live withing the required water services area?
Recruiter note: Please see postcode list to confirm participant lives within wastewater only area

Yes	Record postcode and continue to q19
No	Thank & Close
Don't know	Thank & Close

SECTION 6: WATER

Q18: (For London and Reading only) Please confirm your postcode, so we can check you live within the required water services area:
Recruiter note: Please see postcode list to confirm participants lives withing required water service area for London or Reading

Water and wastewater services (combined service)	Record postcode and continue
Water services only	Thank & Close
Wastewater services only	Thank & Close
Thames Water does not provide me with either water or wastewater services	Thank & Close

Q19: Which statement best matches your household situation?

I have a water meter (i.e. I am charged according to my usage)	Recruit x8 per location and continue to Q20
I do not have a water meter (i.e. I get charged a flat fee for my water usage, 'rateable value')	Recruit x8 per location and continue to Q21

Q20 [metered customers only]: Which statement best matches your household situation?

I have a smart water meter	Record, recruit min x3 per location
I have a non-smart water meter	Record, recruit min x3 per location

Q21: Who is responsible in your household for paying the water and/or waste-water bills?

I am solely responsible	Record and continue
I share the responsibility with someone else	
Someone else is	
Don't know	

SECTION 7: HEALTH AND WELLBEING

Q22: Which best describes your living situation?

Renting from a private landlord (incl estate agents)	Recruit min x6 London Recruit min x5 Reading & Watford
Renting from a housing association	Recruit min x6 London Recruit min x5 Reading & Watford
Renting from a local authority housing (local council)	
Own home with or without a mortgage	Recruit min x6 London Recruit min x5 Reading & Watford
Other	Record and continue

Q23: Which, if any of the following apply to you. Please think of the most recent event if you've experienced more than one
Select all that apply

Claim a private pension	Record and continue to Q24
Claim a state pension	
Claim benefits e.g., Jobseekers Allowance, Universal credit, Disability etc.	
Have a disability, health condition or serious illness (including cancer, dementia)	
Have a medical condition that requires consistent supply of water	
Have a child living in your home ages 0-3 years old	
Need a translation to understand communications from your water company	
Are blind, partially sighted, deaf or hard of hearing	
Have a mental health condition	
Need extra support due to life-changing events such as bereavement	
None of the above	

Q24: [IF ANSWERED YES TO ANY OF THE ABOVE] Are you currently on your water companies' priority service register?
Answers used to inform PSR quota

Yes	Recruit, 2-3 per location
No	**Record**, continue
Don't know	Record, continue

Q25: How would you describe your ability to use or access to technology for tasks such as buying things online, paying bills online and staying in touch with people?

I am able to use and access technology with ease, including using a laptop and access good internet	Record and continue to Q26
I have some minor difficulties accessing or using technology but can generally get by with those tasks	
I find accessing or using technology very difficult which can make some daily tasks very difficult or impossible	Don't exclude Digitally disengaged, record and continue to Q26
I rarely / never use the internet	
I find Wi-Fi and mobile data too expensive to use	
I do not have Wi-Fi, only mobile data	
I do not own an internet-enabled phone, tablet, laptop or computer	

SECTION 8: ADDITIONAL, CONSENT AND PERMISSIONS

Q26: As part of this research, we will be audio recording the session. These recordings will only be used internally by the BritainThinks research team. Are you happy to be audio and video recorded during the research?

Yes	Continue
No	**Thank & close**

Q27: The workshops will be filmed / photographed and the footage / these photographs to be used by BritainThinks, Thames Water staff and on the Thames Water website, or shared with Thames Water's independent Customer Challenge Group, the water industry regulator Ofwat or other UK water companies. Photos/video will be deleted by 31st December 2030.. Are you happy to be filmed/photographed during the research?

Yes	Continue
No	**Thank and close**

Q28: Representatives from Thames Water and Thames Water's independent Customer Challenge Group will be attending the workshop to observe the research. Are you happy to take part on this basis?

Yes	Continue
No	**Thank & close**

Q28: During the workshop, photographs and video may be taken and used in reporting (which may be published). Are you happy to have your photo and video taken on this basis?
Add if necessary: these will be informal photos/videos of the group during discussions and individuals will not be named if they appear in photos/videos.

Yes	Continue
No	**Record**

Q29: BritainThinks will keep your information on file for a period of up to 3 months; this is for BritainThinks' quality monitoring purposes only and your information will not be passed along to any other third party or marketing organisations without your consent. Are you happy for BritainThinks to store your data for a period of up to 3 months?

Yes	Continue
No	**Thank and close**

Q30: It may be necessary for Thames Water and/or Britain Thinks to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research within the next 3 months.

Yes	Continue
No	**Thank and close**

Q31: For this research, workshops will be held in a venue in your area of the country. For these workshops, we will be providing food and drinks. Do you have any dietary requirements/allergies that we should be made aware of?

Yes	Continue
No	**Thank and close**

Q32: Do you have any mobility issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

Q33: Do you have any other health issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

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SECTION 8: YOUR DETAILS

Q34: Do you have any needs or requirements that you would like us to consider for the research (E.g. mobility, dyslexia, hearing trouble)? or allergies/dietary requirements we should consider for the workshop catering?

Record

Q35: For the pre-task, you will need to access an internet-enabled device. Do you personally own or have access to…

Smartphone or another internet-enabled smartphone	Record
Tablet/iPad	
Laptop	
Desktop	
I do not own an internet-enabled device	**Record and capture address, offline versions can be posted**

Finally, I just need to take details of your name, address and telephone number:

Name:	
Email address:	
Telephone number:	
Postal address for digitally disengaged	

Please note telephone numbers are mandatory. No two people should know each other.

SECTION 9: INTERVIEWER DECLARATION

Q36: Is there anything else the interviewer should be made aware of?

Record

THIS IS A TRUE RECORD OF AN INTERVIEW WHICH HAS BEEN CONDUCTED WITH A RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE

INTERVIEWER'S SIGNATURE: ……

DATE: ……

Qualitative screener

Household citizen experts

Thames Water | PR24 Options

Recruitment specification and screener | July 2022

Citizen experts: 3 hr in-person workshops
Recruit x8 customers (HH) across the Thames Water region, representative of a broad range of segments and situations **Citizen experts will take part in two f2f deliberative workshops, which will involve a more immersive engagement with us, with the material and with Thames Water senior management** **Workshops to take place:** • Short pre-read pre-task (shared via MS Forms) • Tuesday 2nd August in London 6pm-9pm (Central London location tbc) • Small 'reflections' homework task • Saturday 6th Aug 10 – 4pm (Central London location tbc) **Incentives:** • £85 for 3hr f2f evening workshop • £200 for 6hr Saturday workshop

Demographic criteria
• **Range of gender** (male/female/non-binary)
  o Min x3 male
  o Min x3 female
• **Mix of ages**
  o 2 x 25 - 34 yrs
  o 2 x 35 – 44 yrs
  o 2 x 45 – 64 yrs
  o 2 x 65+yrs
• **Mix of SEG**
  o 2 x AB
  o 3 x C1
  o 1 x C2
  o 2 x DE
• **Ethnicity**
  o Min 2 x from an ethnic minority
• **Mix of urban and rural across sample**
  o Min 2 x rural
  o Mix of semi-rural / suburban and urban
• **Living situation**
• Min 2 homeowner
• Min 2 renter
• Min 2 LHA

Project-specific criteria
• Mix of bill payers and TW consumers that don't actually pay the bill themselves
• All to be household customers
• Min x3 metered; min x3 unmetered
• Mix of combined and wastewater only customers
• Aim 5 combined service customers, min. 3 wastewater only customers
• Min 1 metered customers to have a smart meter, Min 1 to have a non-smart meter
• Min 1 x customers to be on the priority services register
 	
• **Additional, consent and permissions**
  o Permission to be audio recorded
  o Permission for client to be present
  o Permission for BritainThinks to store data
  o Permission to be re-contacted for further Thames Water research
  o Permission for photographs and video to be taken at the session and used in reporting (which may be published)

Other requirements • No participants to have taken part in research in the past 6 months • No participants to have taken part in research on this topic before • No participants to have taken part in the last round of this research • No two participants to know each other • No participants to have worked in listed occupations

SECTION 1: INTRODUCTION

Good morning/afternoon/evening,

I am looking to recruit people to take part in a research project. The research is being conducted by BritainThinks, an independent market research company, on behalf of the water company, Thames Water.

We are looking to speak to household customers across the Thames Water region. The research would consist of a small pre-task, an in-person evening session at a central London location, a small homework task and then an a further in-person day workshop in the same location. **You would receive a total of £285** (workshop 1 = £85 + workshop 2 = £200) as a thank you for taking part in the project and you will be paid in the days following the final workshop via Ayda, an independent payment platform.

The first session will be on **Tuesday 2nd August at 6pm to 9pm.** It will take place in person and last 3 hours. In advance of the event, we will share pre task details via email. The second

workshop will be a full day session on **Saturday 6th August 10am to 4pm**, at the same central London location.

Everyone taking part in the research will come from different backgrounds and will have a range of different experiences to talk about so don't worry, there are no 'right' or 'wrong' answers to the questions I am about to ask you.

Please note that if you do take part in this project, you will not be able to take part in any other BritainThinks research projects for the next 12 months. If you are interested in taking part, I just need to ask you a few questions.

SECTION 2: DECLARATION

Q1: I'm now going to ask you a range of questions about yourself and the work you do to understand if you are suitable to participate in this research. This will include questions about your ethnicity, health status and financial status. Are you happy to proceed on that basis?

Yes	Continue
No	**Thank & close**

Q2: Are you currently participating, or scheduled to participate in any market research?

Yes	**Thank & close**
No	Continue

Q3: Have you taken part in any market research before?

Yes	Go to Q4
No	Go to Q6

Q4: If yes, how many market research discussions have you taken part in, in the past 6 months? And in the past 12 months?

Past 6 months	**Thank & close**
Past 12 months	Record:

Q5: If yes, please list all topics covered in all previous market research discussions you have attended in the past 12 months

Record: Thank and close if attended any market research topic on water or utilities, in the past 12 months

Q6: Have you taken part in any research with BritainThinks in the last 12 months?

Yes	**Thank & close**
No	Continue

Q7: Have you ever taken part in any Thames Water research before?

Yes	**Thank & close**
No	Continue

Q8: Have you ever been employed in any of the following occupations?

Market Research	**Thank & close**
Marketing	
Journalism	
Media	
Water sector	
Thames Water	

SECTION 3: ABOUT YOU

Q9: How would you describe your gender?

Male	Recruit min x3
Female	Recruit min x3
Non-binary	Record

Q10: What is your age?

25 – 304	Recruit 2
35- 44	Recruit 2
45 – 64	Recruit 2
Over 65	Recruit 2

Q11: How would you describe your ethnic background?
Do not read out list of options – code answer against the following so that participants can self-describe.

White British / White European / White other	Record
Mixed	Record and recruit min. 2
Asian / Asian British	
Black / African / Caribbean / Black British	
Other (please specify)	

These groups are based on the 2021 census. If needed, a more detailed breakdown of groups can be found here.

SECTION 4: FINANCE

Q12: What is/was the occupation of the person in your household who earns/earned the highest salary? [If retired, occupation prior to retirement]

Write in

Q13: Record social grade
Answers used to inform financial vulnerability

A	
B	Recruit 2
C1	Recruit 3
C2	Recruit 1
D	Recruit 2
E	

Q14: Which statement best describes you?

I am a household Thames Water customer, and I am participating in this research on that basis	Recruit x 8 as HH customers and continue to Section 5
I am a non-household (business) Thames Water customer, and I am participating in this research on that basis	Thank & Close (recruit for NHH sample)

SECTION 5: LOCATION

Q15: Which best describes where you live?

Urban	Recruit mix
Semi-rural / suburban	

Rural	Recruit min. 2

If clarification is needed:

- **Urban:** city / large town with population over 10,000
- **Small town / Suburban :** settlement of 3,000 to 10,000 people or less than 20 minute drive from an urban area
- **Village / rural:** settlement of less than 3,000 people / sparsely populated area / more than 20 minute drive from urban area

Q16: In what town, village or city do you currently live in?

Record (within London or reasonable travel distance into central London) Do not recruit outside of M25.

SECTION 6: WATER

Q17: Please confirm your postcode, to ensure you live within the required water services area:
Recruiter note: Please see postcode list to confirm participant lives within required water services area

Water and wastewater services (combined service)	Record and continue (aim 5)
Water services only	Thank & Close
Wastewater services only	Recruit min. 3
Thames Water does not provide me with either water or waste-water services	Thank & Close

Q18: Which statement best matches your household situation?

I have a water meter (i.e. I am charged according to my usage)	Recruit x 3 and continue to Q19
I do not have a water meter (i.e. I get charged a flat fee for my water usage, 'rateable value')	Recruit x 3 and continue to Q20

Q19 [metered customers only]: Which statement best matches your household situation?

I have a smart water meter	Record, recruit min. 1

I have a non-smart water meter	Record, recruit min. 1

Q20: Who is responsible in your household for paying the water and/or waste-water bills?

I am solely responsible	Record and continue
I share the responsibility with someone else	
Someone else is	
Don't know	

SECTION 7: HEALTH AND WELLBEING

Q21: Which best describes your living situation?

Renting from a private landlord (incl estate agents)	Recruit min. 2
Renting from a housing association	Recruit min. 2
Renting from a local authority housing (local council)	
Own home with or without a mortgage	Recruit min. 2
Other	Record and continue

Q22: Which, if any of the following apply to you. Please think of the most recent event if you've experienced more than one
Select all that apply

Claim a private pension	Record and continue to Q23
Claim a state pension	
Claim benefits e.g., Jobseekers Allowance, Universal credit, Disability etc.	
Have a disability, health condition or serious illness (including cancer, dementia)	

Have a medical condition that requires consistent supply of water	
Have a child living in your home ages 0-3 years old	
Need a translation to understand communications from your water company	
Are blind, partially sighted, deaf or hard of hearing	
Have a mental health condition	
Need extra support due to life-changing events such as bereavement	
None of the above	

Q23: [IF ANSWERED YES TO ANY OF THE ABOVE] Are you currently on your water companies' priority service register?
Answers used to inform PSR quota

Yes	Recruit min 1
No	Record, continue
Don't know	Record, continue

Q24: How would you describe your ability to use or access to technology for tasks such as buying things online, paying bills online and staying in touch with people?

I am able to use and access technology with ease, including using a laptop and access good internet	Record and continue to Q25
I have some minor difficulties accessing or using technology but can generally get by with those tasks	
I find accessing or using technology very difficult which can make some daily tasks very difficult or impossible	Digitally disengaged, record and continue to Q25
I rarely / never use the internet	
I find Wi-Fi and mobile data too expensive to use	
I do not have Wi-Fi, only mobile data	
I do not own an internet-enabled phone, tablet, laptop or computer	

SECTION 8: ADDITIONAL, CONSENT AND PERMISSIONS

Q25: As part of this research, we will be audio recording the session. These recordings will only be used internally by the BritainThinks research team. Are you happy to be audio and video recorded during the research?

Yes	Continue
No	**Thank & close**

Q26: The workshops will be filmed / photographed and the footage / these photographs to be used by BritainThinks, Thames Water staff and on the Thames Water website, or shared with Thames Water's independent Customer Challenge Group, the water industry regulator Ofwat or other UK water companies. Photos/video will be deleted by 31st December 2030.. Are you happy to be filmed/photographed during the research?

Yes	Continue
No	**Thank and close**

Q27: Representatives from Thames Water and Thames Water's independent Customer Challenge Group will be attending the workshop to observe the research. Are you happy to take part on this basis?

Yes	Continue
No	**Thank & close**

Q28: During the workshop, photographs and video may be taken and used in reporting (which may be published). Are you happy to have your photo and video taken on this basis?
Add if necessary: these will be informal photos and video of the group during discussions and individuals will not be named if they appear in photos/videos.

Yes	Continue
No	**Record**

Q29: BritainThinks will keep your information on file for a period of up to 3 months; this is for BritainThinks' quality monitoring purposes only and your information will not be passed along to any other third party or marketing organisations without your consent. Are you happy for BritainThinks to store your data for a period of up to 3 months?

Yes	Continue
No	**Thank and close**

Q30: It may be necessary for Thames Water and/or Britain Thinks to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research within the next 3 months.

Yes	Continue
No	**Thank and close**

Q31: For this research, workshops will be held in a venue in your area of the country. For these workshops, we will be providing food and drinks. Do you have any dietary requirements/allergies that we should be made aware of?

Yes	Continue
No	**Thank and close**

Q32: Do you have any mobility issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

Q33: Do you have any other health issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

SECTION 8: YOUR DETAILS

Q34: Do you have any needs or requirements that you would like us to consider for the research (E.g. mobility, dyslexia, hearing trouble)? or allergies/dietary requirements we should consider for the workshop catering?

Record

Q35: For the pre-task, you will need to access an internet-enabled device. Do you personally own or have access to…

Smartphone or another internet-enabled smartphone	Record
Tablet/iPad	
Laptop	
Desktop	
I do not own an internet-enabled device	**Record and capture address, offline versions can be posted**

Finally, I just need to take details of your name, address and telephone number:

Name:	
Email address:	
Telephone number:	
Postal address for digitally disengaged	

Please note telephone numbers are mandatory. No two people should know each other.

SECTION 9: INTERVIEWER DECLARATION

Q36: Is there anything else the interviewer should be made aware of?

Record

THIS IS A TRUE RECORD OF AN INTERVIEW WHICH HAS BEEN CONDUCTED WITH A RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE

INTERVIEWER'S SIGNATURE: ……

DATE: ……

Qualitative screener

Non-household consumer experts

Thames Water | PR24 Options

Recruitment specification and screener | July 2022

3 x in-person workshops
Recruit 12 customers (NHH) across 3 locations of the Thames Water region, representative of a broad range of segments and situations **Business Customer experts for each location will take part in one 3hr f2f deliberative workshop and will become educated about the issues, to provide detailed feedback, but will represent a more mainstream customer audience)** **Workshops to take place:** • Short pre-read pre-task (shared via MS Forms) • Dates: on either Tues 26th, Wed 27th July or Wed 3rd Aug at 6 - 9pm **Locations** • Central London (venue tbc) • Reading (venue tbc) • Watford (venue tbc) **Incentive:** • £150 for 3hr f2f evening workshop

Project-specific criteria

Central London (x5 NHH)	Reading (x5 NHH)	Watford (x4 NHH)
Range of gender (male/female/non-binary) **Aim for a mix of ages** **Aim for a mix of Ethnicity**		
All participants to be business customers in the Thames Water supply area		
All responsible for their company's water bill and for dealing with water supplier where necessary		
Spread of businesses in inner and outer London		
A range of business sizes • **0 to 9 employees** • **10 to 249 employees** • **250+ employees (best efforts basis)**		
A range of sectors • **Construction, mining, manufacturing, agriculture** • **Wholesale, retail, repair motor vehicles, transportation** • **Accommodation and food services**		
• **Services – information, financial, real estate, professional, scientific, technical activities, admin and support** • **Public organisations, education, health and social work** • **Other**		
A range of levels of expenditure on water – to drop out naturally		
Min x 4 metered	**Min x4 metered**	**Min x3 metered**
x5 Household Water and wastewater service customers		**x4 Non-Household Wastewater customers only**

• **Additional, consent and permissions**
  • Permission to be audio recorded
  • Permission for client to be present
  • Permission for BritainThinks to store data
  • Permission to be re-contacted for further Thames Water research
  • Permission for photographs and video to be taken at the session and used in reporting (which may be published)		

Other requirements • No participants to have taken part in research in the past 6 months • No participants to have taken part in research on this topic before • No participants to have taken part in the last round of this research • No two participants to know each other • No participants to have worked in listed occupations		

Britainthinks

SECTION 1: INTRODUCTION

Good morning/afternoon/evening,

I am looking to recruit people to take part in a research project. The research is being conducted by BritainThinks, an independent market research company, on behalf of the water company, Thames Water.

We are looking to speak to non-household customers (who are responsible for their company's water bill and for dealing with water supplier where necessary) across the Thames Water region. The research would consist of a small pre-task, an in-person evening session at a WATFORD/READING/LONDON location. You would receive a total of £150(NHH) as a thank you for taking part in the project and you will be paid in the days following the final workshop via Ayda, an independent payment platform.

The session will be on Tues 26th, Wed 27th July or Wed 3rd Aug at 6 - 9pm. It will take place in person and last 3 hours. In advance of the event, we will share pre task details via email.

Britainthinks

Everyone taking part in the research will come from different backgrounds and will have a range of different experiences to talk about so don't worry, there are no 'right' or 'wrong' answers to the questions I am about to ask you.

Please note that if you do take part in this project, you will not be able to take part in any other BritainThinks research projects for the next 12 months. If you are interested in taking part, I just need to ask you a few questions.

SECTION 2: DECLARATION

Q1: I'm now going to ask you a range of questions about your business and the work you do to understand if you are suitable to participate in this research. Are you happy to proceed on that basis?

Yes	Continue
No	**Thank & close**

Q2: Are you currently participating, or scheduled to participate in any market research?

Yes	**Thank & close**
No	Continue

Q3: Have you taken part in any market research before?

Yes	Go to Q4
No	Go to Q6

Q4: If yes, how many market research discussions have you taken part in, in the past 6 months? And in the past 12 months?

Past 6 months	**Thank & close**
Past 12 months	Record:

Q5: If yes, please list all topics covered in all previous market research discussions you have attended in the past 12 months

Record: Thank and close if attended any market research topic on water or utilities, in the past 12 months

Q6: Have you taken part in any research with BritainThinks in the last 12 months?

Yes	**Thank & close**
No	Continue

Q7: Have you ever taken part in any Thames Water research before?

Yes	**Thank & close**
No	Continue

Q8: Have you ever been employed in any of the following occupations?

Market Research	**Thank & close**
Marketing	
Journalism	
Media	
Water sector	
Thames Water	

Q9: What type of account does your business have with you water supplier? (check postcode list to ensure correct supplier)

Business account	Continue, recruit x 5 London & Reading recruit x4 Watford
Household account	Thank & close

SECTION 3: ABOUT YOU

Q10: How would you describe your gender?

Male	Record and aim for a mix
Female	
Non-binary	

Q11: What is your age?

25 – 30	Record and aim for a mix
31- 45	
46 – 60	
Over 60	

Q12: How would you describe your ethnic background?
Do not read out list of options – code answer against the following so that participants can self-describe.

White British / White European / White other	
Mixed	Record, aim for a mix
Asian / Asian British	
Black / African / Caribbean / Black British	
Other (please specify)	

These groups are based on the 2021 census. If needed, a more detailed breakdown of groups can be found here.

SECTION 4: WATER

Q13: Which best describes the location of your business

Urban	Record, recruit mix
Semi-rural / suburban	
Rural	

If clarification is needed:

- **Urban:** city / large town with population over 10,000
- **Small town / Suburban :** settlement of 3,000 to 10,000 people or less than 20 minute drive from an urban area
- **Village / rural:** settlement of less than 3,000 people / sparsely populated area / more than 20 minute drive from urban area

Q14: In what town, village or city is your business based in?

Central London (or within reasonable travel distance - do not recruit outside of M25)	Recruit x 5 and continue to q16
Reading (or within reasonable travel distance)	Recruit x 5 and continue to q16
Watford (or within reasonable travel distance)	Recruit x 4 and continue to q15 (waste only)

Q15: (For Watford only) Please could you confirm your business postcode to ensure you are located within the wastewater services only area?
Recruiter note: Please see postcode list to confirm participants business is located within wastewater only area

Yes	Record postcode, recruit x 4 and continue to q16
No	Thank & Close
Don't know	Thank & Close

Q16: What is the name of your business?

Record

Q17: What size is your business? (By this I mean the number of people that work for the organisation as a whole rather than just in your branch/office team)

0-9 employees	Record, recruit mix (aim for two 250+ on a best efforts basis)
10-249 employees	
250+ employees	

Q18: How many sites does your business have?

1	Record, recruit mix
2	
3	
4 +	

Q19: What sector do you work in?

Construction, mining, manufacturing, agriculture	**RECRUIT MIX**
Wholesale, retail, repair motor vehicles, transportation	
Accommodation and food services	
Services – information, financial, real estate, professional, scientific, technical activities, admin and support	
Public organisations, education, health and social work	
Other services	

Q20: (Reading and London Only) Please could you confirm your business postcode to ensure you are located within the water services area?
Recruiter note: Please see postcode list to confirm participants business is located within correct water services area

Water and wastewater services (combined)	Record postcode, recruit x5 Reading & x5 London
Water services only	Thank & Close
Wastewater services only	Thank & Close
Thames Water does not provide me with either water or waste-water services	Thank & Close

Q21: Which statement best matches your organisation?
Recruiter note: we would expect the majority to be metered

My business has a water meter (i.e. charged according to usage)	Record, recruit min x4 Reading & London Record, recruit min x3 Watford continue to q22
My business does not have a water meter (i.e. get charged a flat fee for water usage, 'rateable value')	Record, continue to q23

Q22 [metered customers only]: Which statement best matches your organisation's situation?

I have a smart water meter	Record, recruit min x1-2 per location and continue to q23
I have a non-smart water meter	Record, recruit min x1-2 per location and continue to q23

Q23: Who is responsible in your organisation for paying the water and/or waste-water bills?

I am solely responsible	Continue
I share the responsibility with someone else	
Someone else is	Thank & close
Don't know	

Q24: Who in your company is responsible for dealing with you water supplier where required?

Respondent themselves	Continue
Colleague	Thank & close
Don't know	

Q25: How much is your business' average water bill per year?

< £5000	Record
£5000-£9,999	
£10,000-£14,999	
£15,000+	

Q26: As a proportion of your business' outgoings, how much does your business spend on water?

Less than 5%	Record
More than 5%	
Don't know	

Q27: To what extent, if at all, is water integral to the operations of your business? (By this I am referring to your business' commercial use of water rather than drinking, etc.)

Water is integral to my business' operations	Record
Water is not integral to my business' operations	

SECTION 5: ADDITIONAL, CONSENT AND PERMISSIONS

Q28: As part of this research, we will be audio recording the session. These recordings will only be used internally by the BritainThinks research team. Are you happy to be audio and video recorded during the research?

Yes	Continue
No	**Thank & close**

Q29: The workshops will be filmed / photographed and the footage / these photographs to be used by BritainThinks, Thames Water staff and on the Thames Water website, or shared with Thames Water's independent Customer Challenge Group, the water industry regulator Ofwat or other UK water companies. Photos/video will be deleted by 31st December 2030.. Are you happy to be filmed during the research?

Yes	Continue
No	**Thank and close**

Q30: Representatives from Thames Water and Thames Water's independent Customer Challenge Group will be attending the workshop to observe the research. Are you happy to take part on this basis?

Yes	Continue
No	**Thank & close**

Q31: During the workshop, photographs and videos may be taken and used in reporting (which may be published). Are you happy to have your photo and video taken on this basis?
Add if necessary: these will be informal photos/videos of the group during discussions and individuals will not be named if they appear in photos/videos.

Yes	Continue
No	**Record**

Q32: BritainThinks will keep your information on file for a period of up to 3 months; this is for BritainThinks' quality monitoring purposes only and your information will not be passed along to any other third party or marketing organisations without your consent. Are you happy for BritainThinks to store your data for a period of up to 3 months?

Yes	Continue
No	**Thank & close**

Q33: It may be necessary for Thames Water and/or Britain Thinks to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research.

Yes	Continue
No	**Thank & close**

Q34: For this research, workshops will be held in a venue in your area of the country. For these workshops, we will be providing food and drinks. Do you have any dietary requirements/allergies that we should be made aware of?

Yes	Continue
No	**Thank and close**

Q35: Do you have any mobility issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

Q36: Do you have any other health issues or requirements that we should be made aware of for the workshops?

Yes	Record

No	Continue
Prefer not to say	

SECTION 6: YOUR DETAILS

Q37: Do you have any needs or requirements that you would like us to consider for the research (E.g. mobility, dyslexia, hearing trouble)? Or allergies/dietary requirements we should consider for the workshop catering?

Record

Q38: For the pre-task, you will need to access an internet-enabled device. Do you personally own or have access to…

Smartphone or another internet-enabled smartphone	Record
Tablet/iPad	
Laptop	
Desktop	
I do not own an internet-enabled device	**Record an capture postal address, offline versions can be posted**

Finally, I just need to take details of your name, address and telephone number:

Name:	
Email address:	
Telephone number:	
Postal address for digitally disengaged	

Please note telephone numbers are mandatory. No two people should know each other.

SECTION 6: INTERVIEWER DECLARATION

Q39: Is there anything else the interviewer should be made aware of?

Record

THIS IS A TRUE RECORD OF AN INTERVIEW WHICH HAS BEEN CONDUCTED WITH A RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE

INTERVIEWER'S SIGNATURE: ……

DATE: ……

Qualitative screener

Non-household citizen experts

Thames Water | PR24 Options

Recruitment specification and screener | July 2022

Citizen experts: 1.5 days in-person workshops
Recruit x4 customers (NHH) across the Thames Water region, representative of a broad range of segments and situations **Citizen experts will take part in two f2f deliberative workshops, which will involve a more immersive engagement with us, with the material and with Thames Water senior management** **Workshops to take place:** • Short pre-read pre-task (shared via MS Forms) • Tuesday 2nd August in London 6pm-9pm (Central London location tbc) • Small 'reflections' homework task • Saturday 6th Aug 10 – 4pm (Central London location tbc) **Incentives:** • £150 for 3hr f2f evening workshop • £300 for 6hr Saturday workshop

Project-specific criteria
• **All participants to be business customers in the Thames Water supply area**
• **All responsible for their company's water bill and for dealing with water supplier where necessary**
• **Spread of businesses in inner and outer London** (within the M25)
• **A range of business sizes** (number of employees)
  ○ 0 to 9 employees
  ○ 10 to 249 employees
  ○ 250+ employees (best efforts basis)
• **A range of sectors**
  ○ Construction, mining, manufacturing, agriculture
  ○ Wholesale, retail, repair motor vehicles, transportation
  ○ Accommodation and food services
  ○ Services – information, financial, real estate, professional, scientific, technical activities, admin and support
  ○ Public organisations, education, health and social work
  ○ Other
• **A range of levels of expenditure on water** – to drop out naturally
• **A range of billing arrangements** – to drop out naturally
  ○ Billed directly by Thames Water
  ○ Billed by another group, e.g. local authority, landlord
• **Some customers to have meters and others not** – to drop out naturally (we would expect majority to be metered)
  ○ Min. 1 of metered customers to have a smart meter, Min. 1 to have a non-smart meter

- **Mix of fresh and wastewater customers**
  - min. 2 wastewater customers, aim 2 combined
- **Additional, consent and permissions**
  - Permission to be audio recorded
  - Permission for client to be present
  - Permission for BritainThinks to store data
  - Permission to be re-contacted for further Thames Water research
  - Permission for photographs and video to be taken at the session and used in reporting (which may be published)

Other requirements

- No participants to have taken part in research in the past 6 months
- No participants to have taken part in research on this topic before
- No participants to have taken part in the last round of this research
- No two participants to know each other
- No participants to have worked in listed occupations

SECTION 1: INTRODUCTION

Good morning/afternoon/evening,

I am looking to recruit people to take part in a research project. The research is being conducted by BritainThinks, an independent market research company, on behalf of the water company, Thames Water.

We are looking to speak to non-household customers (who are responsible for their company's water bill and for dealing with water supplier where necessary) across the Thames Water region. The research would consist of a small pre-task, an in-person evening session at a central London location, a homework task and then an in-person day workshop in the same location. **You would receive a total of £450** (workshop 1 = £150 + workshop 2 = £300) as a thank you for taking part in the project and you will be paid in the days following the final workshop via Ayda, an independent payment platform.

The first session will be on **Tuesday 2nd August at 6pm to 9pm**. It will take place in person and last 3 hours. In advance of the event, we will share pre task details via email. The second workshop will be a full day session on **Saturday 6th August 10am to 4pm**, at the same central London location.

Everyone taking part in the research will come from different backgrounds and will have a range of different experiences to talk about so don't worry, there are no 'right' or 'wrong' answers to the questions I am about to ask you.

Please note that if you do take part in this project, you will not be able to take part in any other BritainThinks research projects for the next 12 months. If you are interested in taking part, I just need to ask you a few questions.

SECTION 2: DECLARATION

Q1: I'm now going to ask you a range of questions about your business and the work you do to understand if you are suitable to participate in this research. Are you happy to proceed on that basis?

Yes	Continue
No	**Thank & close**

Q2: Are you currently participating, or scheduled to participate in any market research?

Yes	**Thank & close**
No	Continue

Q3: Have you taken part in any market research before?

Yes	Go to Q4
No	Go to Q6

Q4: If yes, how many market research discussions have you taken part in, in the past 6 months? And in the past 12 months?

Past 6 months	**Thank & close**
Past 12 months	Record:

Q5: If yes, please list all topics covered in all previous market research discussions you have attended in the past 12 months

Record: Thank and close if attended any market research topic on water or utilities, in the past 12 months

Q6: Have you taken part in any research with BritainThinks in the last 12 months?

Yes	**Thank & close**
No	Continue

Q7: Have you ever taken part in any Thames Water research before?

Yes	**Thank & close**
No	Continue

Q8: Have you ever been employed in any of the following occupations?

Market Research	**Thank & close**
Marketing	

Journalism	
Media	
Water sector	
Thames Water	

Q9: What type of account does your business have with your water supplier?

Business account	Continue, recruit x 4
Household account	Thank & close

SECTION 3: ABOUT YOU

Q10: How would you describe your gender?

Male	Record, aim for a mix
Female	
Non-binary	

Q11: What is your age?

25 – 34	Record, aim for a mix
35- 44	
45 – 64	
Over 65	

Q12: How would you describe your ethnic background?
Do not read out list of options – code answer against the following so that participants can self-describe.

White British / White European / White other	Record, aim for a mix
Mixed	
Asian / Asian British	
Black / African / Caribbean / Black British	

Other (please specify)	

These groups are based on the 2021 census. If needed, a more detailed breakdown of groups can be found here.

SECTION 4: WATER

Q13: Which best describes the location of your business

Urban	Record, recruit mix
Semi-rural / suburban	
Rural	

If clarification is needed:

- **Urban:** city / large town with population over 10,000
- **Small town / Suburban :** settlement of 3,000 to 10,000 people or less than 20 minute drive from an urban area
- **Village / rural:** settlement of less than 3,000 people / sparsely populated area / more than 20 minute drive from urban area

Q14: In what town, village or city is your business based in?

Record – London or within reasonable travel distance of central London (Do not recruit outside of M25)

Q15: What is the name of your business?

Record

Q16: What size is your business? (By this I mean the number of people that work for the organisation as a whole rather than just in your branch/office team)

0-9 employees	Record, recruit mix (aim for one 250+ on a best efforts basis)
10-249 employees	
250+ employees	

Q17: How many sites does your business have?

1	Record, recruit mix
2	
3	
4 +	

Q18: What sector do you work in?

Construction, mining, manufacturing, agriculture	**RECRUIT MIX**
Wholesale, retail, repair motor vehicles, transportation	
Accommodation and food services	
Services – information, financial, real estate, professional, scientific, technical activities, admin and support	
Public organisations, education, health and social work	
Other services	

Q19: Please could you confirm your business postcode to ensure you are located within the wastewater services only area?
Recruiter note: Please see postcode list to confirm required business location

Water and wastewater services (combined)	Record, aim for 2
Water services only	Thank & close
Wastewater services only	Recruit min 2
Thames Water does not provide me with either water or waste-water services	Thank & Close

Q20: Which statement best matches your organisation?
Recruiter note: we would expect the majority to be metered

My business has a water meter (i.e. charged according to usage)	Recruit min x3, continue to q18
My business does not have a water meter (i.e. get charged a flat fee for water usage, 'rateable value')	Record, continue to q19

Q21 [metered customers only]: Which statement best matches your organisation's situation?

I have a smart water meter	Record, recruit min. 1 and continue to q19
I have a non-smart water meter	Record, recruit min. 1 and continue to q19

Q22: Who is responsible in your organisation for paying the water and/or waste-water bills?

I am solely responsible	Continue
I share the responsibility with someone else	
Someone else is	
Don't know	Thank & close

Q23: Who in your company is responsible for dealing with your water supplier where required?

Respondent themselves	Continue
Colleague	Thank & close
Don't know	

Q24: How much is your business' average water bill per year?

< £5000	Record
£5000-£9,999	
£10,000-£14,999	
£15,000+	

Q25: As a proportion of your business' outgoings, how much does your business spend on water?

Less than 5%	Record
More than 5%	
Don't know	

Q26: To what extent, if at all, is water integral to the operations of your business? (By this I am referring to your business' commercial use of water rather than drinking, etc.)

Water is integral to my business' operations	Record
Water is not integral to my business' operations	

SECTION 5: ADDITIONAL, CONSENT AND PERMISSIONS

Q27: As part of this research, we will be audio recording the session. These recordings will only be used internally by the BritainThinks research team. Are you happy to be audio and video recorded during the research?

Yes	Continue
No	**Thank & close**

Q28: The workshops will be filmed / photographed and the footage / these photographs to be used by BritainThinks, Thames Water staff and on the Thames Water website, or shared with Thames Water's independent Customer Challenge Group, the water industry regulator Ofwat or other UK water companies. Photos/video will be deleted by 31st December 2030. Are you happy to be filmed during the research?

Yes	Continue
No	**Thank and close**

Q29: Representatives from Thames Water and Thames Water's independent Customer Challenge Group will be attending the workshop to observe the research. Are you happy to take part on this basis?

Yes	Continue
No	**Thank & close**

Q30: During the workshop, photographs and video may be taken and used in reporting (which may be published). Are you happy to have your photo/video taken on this basis?
Add if necessary: these will be informal photos/videos of the group during discussions and individuals will not be named if they appear in photos/videos.

Yes	Continue
No	**Record**

Q31: BritainThinks will keep your information on file for a period of up to 3 months; this is for BritainThinks' quality monitoring purposes only and your information will not be passed along to any other third party or marketing organisations without your consent. Are you happy for BritainThinks to store your data for a period of up to 3 months?

Yes	Continue

No	**Thank & close**

Q32: It may be necessary for Thames Water and/or Britain Thinks to contact you by email or telephone after the research has taken place to follow up on ideas generated during the discussion. You would only be contacted if strictly necessary and only in connection with this research.

Yes	Continue
No	**Thank & close**

Q33: For this research, workshops will be held in a venue in your area of the country. For these workshops, we will be providing food and drinks. Do you have any dietary requirements/allergies that we should be made aware of?

Yes	Continue
No	**Thank and close**

Q34: Do you have any mobility issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

Q35: Do you have any other health issues or requirements that we should be made aware of for the workshops?

Yes	Record
No	Continue
Prefer not to say	

SECTION 6: YOUR DETAILS

Q36: Do you have any needs or requirements that you would like us to consider for the research (E.g. mobility, dyslexia, hearing trouble)? Or allergies/dietary requirements we should consider for the workshop catering?

Record

Q37: For the pre-task, you will need to access an internet-enabled device. Do you personally own or have access to…

Smartphone or another internet-enabled smartphone	Record
Tablet/iPad	
Laptop	

Desktop	
I do not own an internet-enabled device	**Record and capture address, offline versions can be posted**

Finally, I just need to take details of your name, address and telephone number:

Name:	
Email address:	
Telephone number:	
Postal address for digitally disengaged	

Please note telephone numbers are mandatory. No two people should know each other.

SECTION 6: INTERVIEWER DECLARATION

Q38: Is there anything else the interviewer should be made aware of?

Record

THIS IS A TRUE RECORD OF AN INTERVIEW WHICH HAS BEEN CONDUCTED WITH A RESPONDENT WHO IS NOT A RELATIVE OR FRIEND OF MINE

INTERVIEWER'S SIGNATURE: .....

DATE: .....

Qualitative pre-read

Hello and thank you for agreeing to take part in this important piece of research!

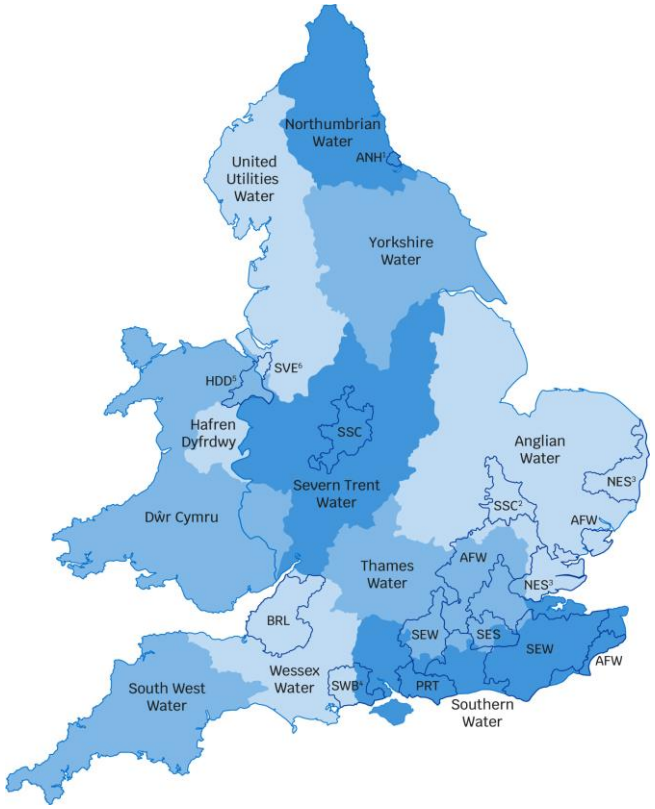
- Before we meet you in person, we have some information about the water industry and Thames Water that we would like you to read through.

- Please read through these slides carefully, thinking about anything that stands out to you or any questions you might have.

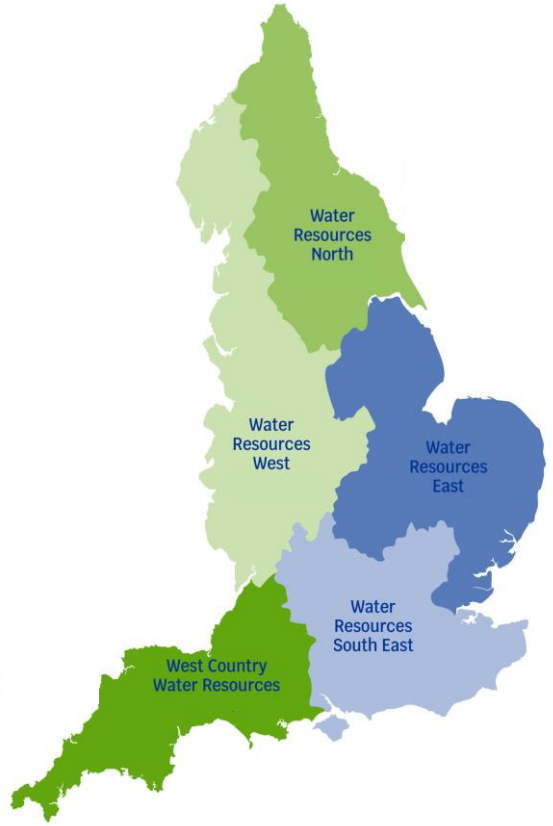
- Once you have read this information, please click on the link in the email to answer some questions reflecting on this information ahead of the workshop.

Background to water industry

There are a number of different companies in the water industry who serve water customers to ensure their water is safe, reliable and environmentally friendly



England and Wales are served by 17 different water companies: some provide just drinking water, others take away sewage as well. Companies in the same area work together to plan for the future in their region, and work with the other regional groups across England to make sure there is enough water for everyone.



The water industry today

Water companies

- Take water from the environment (e.g. rivers) and treat it so it's safe to drink
- Build and maintain infrastructure (like pipes) to supply water to homes and businesses

Drinking Water Inspectorate (DWI)

- Makes sure the water supplied in England and Wales is safe and that drinking water quality is acceptable for customers

Consumer Council for Water

- Represent customers on matters relating to water
- Investigate complaints and provide advice to ensure water services remain fair for customers

Environment Agency

- Protects and enhances the environment
- Works with water companies to ensure operations and plans develop in a sustainable way

Defra

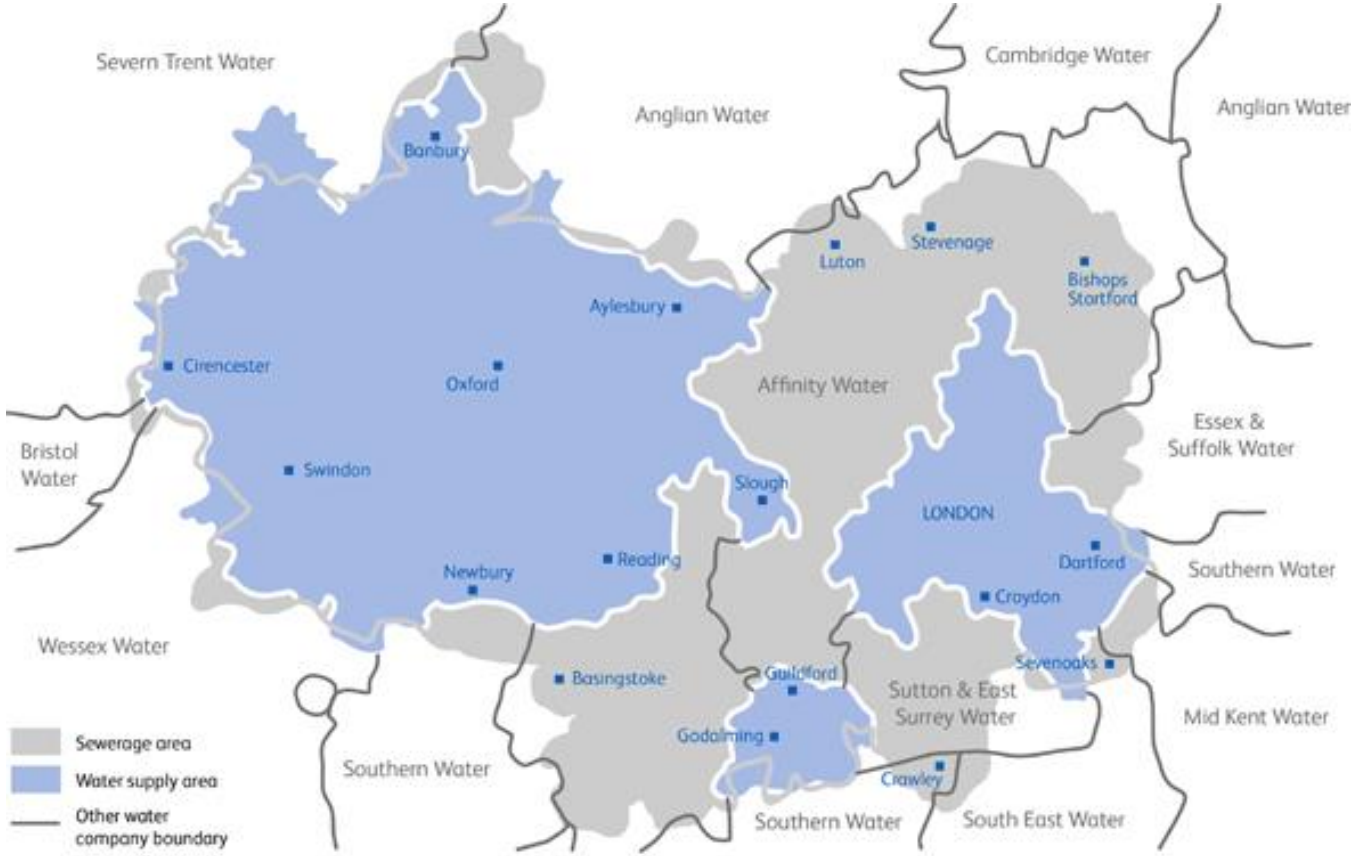
- The UK Government department responsible for protecting the environment and countryside, including water

Office of Water Services (Ofwat)

- A regulator that makes sure water companies do their job properly, including fair pricing for customers and ensuring there is always a reliable water supply

Introduction to Thames Water

Thames Water is the UK's largest water and wastewater services provider



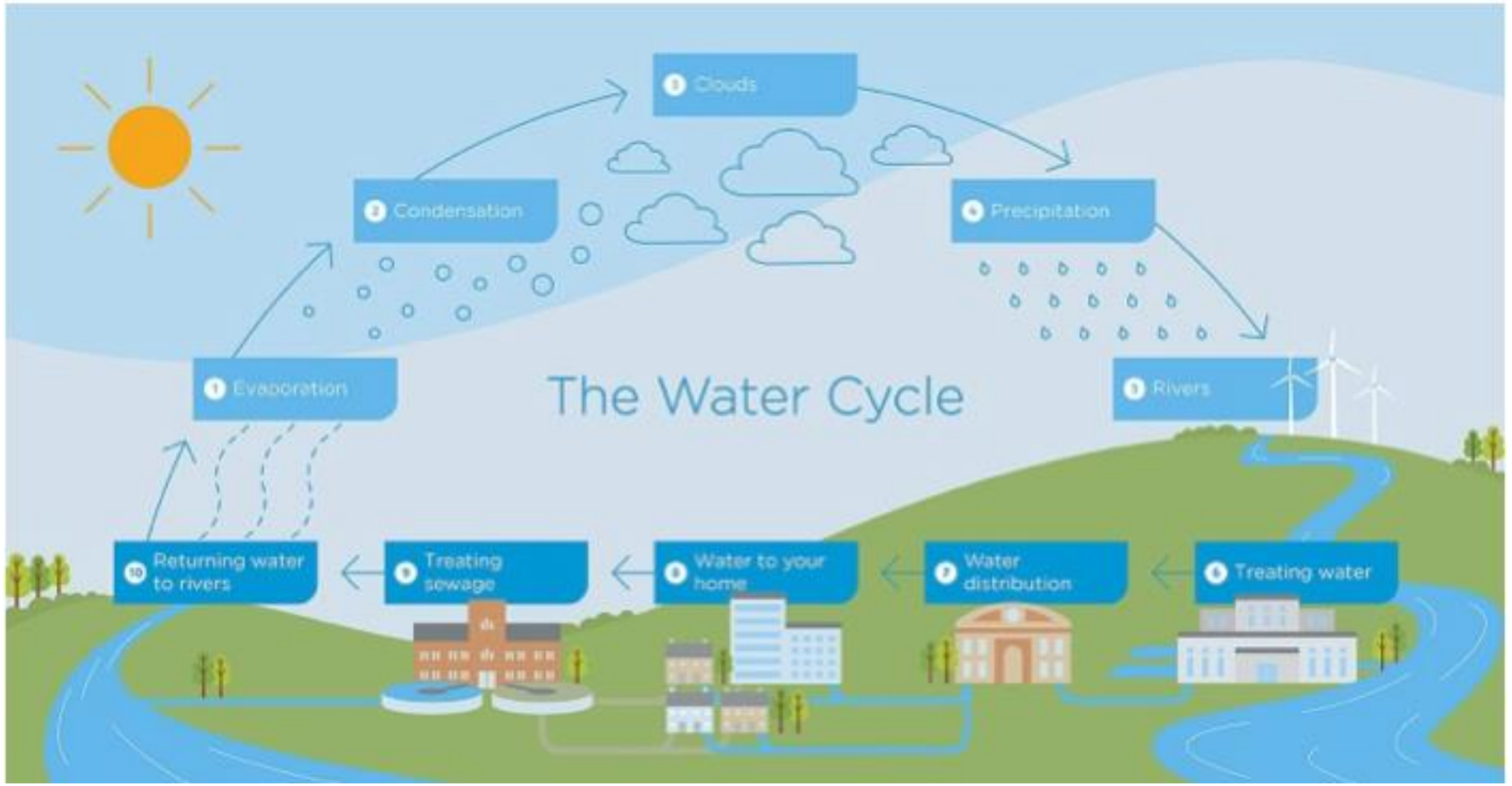
10 million water customers

15 million wastewater customers

Thames Water supplies an average of 2.7 billion litres of drinking water every day to homes and businesses and it treats almost 5 billion litres of sewage a day

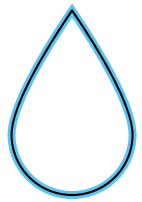
Thames Water and the water cycle

Thames Water takes water from rivers and natural underground stores and turns it into high quality drinking water. It then delivers the drinking water through a water pipe network to homes and businesses. Once the water has been used (i.e., wastewater that goes down sinks and toilets) it is collected in the sewer network. It ends up at sewage treatment works where the water is treated and safely returned to rivers.



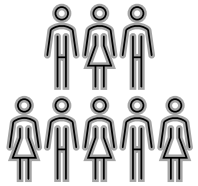
Overall purpose of the project

The main objective is to gain customer feedback on future priorities and service package options



Water companies must meet the needs of their customers

- They must maintain and improve the service in an environmentally responsible way, while facing a number of growing challenges now and in the future.
- In order to ensure they can meet customers' needs and address future challenges,, water companies are required to make long-term plans (as far ahead as 100 years).
- The long-term strategy of water companies must be informed by engagement with customers.



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- Thames Water wants to understand what improvements should be prioritised as they look ahead to their future service.
- Customers will be asked to provide feedback on a number of potential improvements and which of these improvements are most important and/or should be prioritised.
- Your feedback will be used to make sure Thames Water's plans deliver the right balance of outcomes for customers over the next 10-15 years.

Challenges for Thames Water

Thames Water are facing several challenges that must be tackled now, and in the future

• Population growth	• In the future, demand for water will increase as there are more people, more homes and more businesses to supply
• Climate change	• The effects of climate change mean that there will be less water available to meet the increasing demand from customers (e.g. hotter and drier summers could mean more water shortages and risk of drought)
• Declining river quality and biodiversity	• Widespread pollution (e.g. sewage, plastics, chemicals) is threatening freshwater habitats and biodiversity in the UK (currently no UK rivers are officially safe to swim in) • To reduce negative impacts on fish, wildlife, plants and recreation, water companies will be allowed to take less water from sensitive water sources
• Ageing infrastructure	• Old pipe networks and treatment works mean higher maintenance needs and costs • The effectiveness of the infrastructure may also decline with age and may become potential safety hazards

Planning ahead in a meaningful way can help Thames Water to solve some of these challenges and consider how their future plans might impact some of these issues (e.g. reducing leakage can help increase water supply)

Qualitative participant pack

PR24 consultation

Customer journal

Pre-read information

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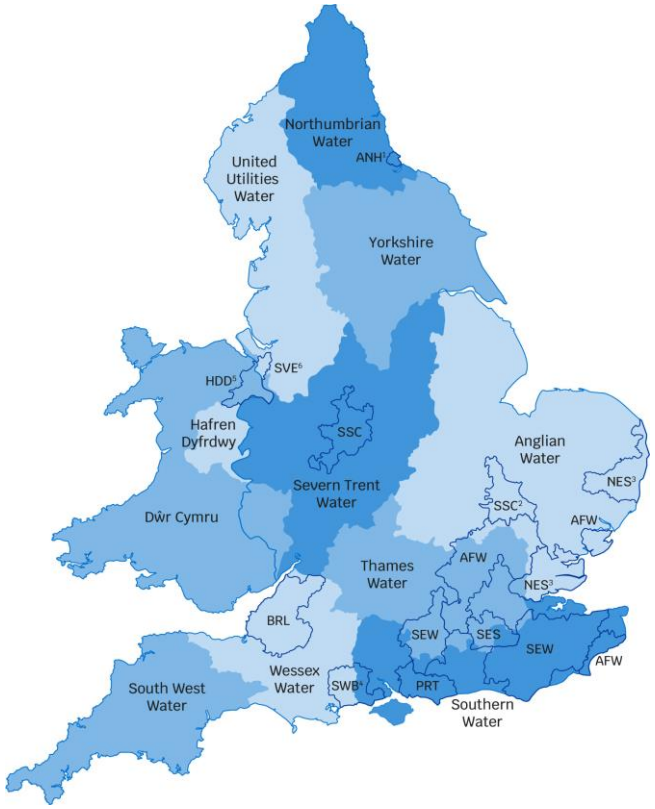

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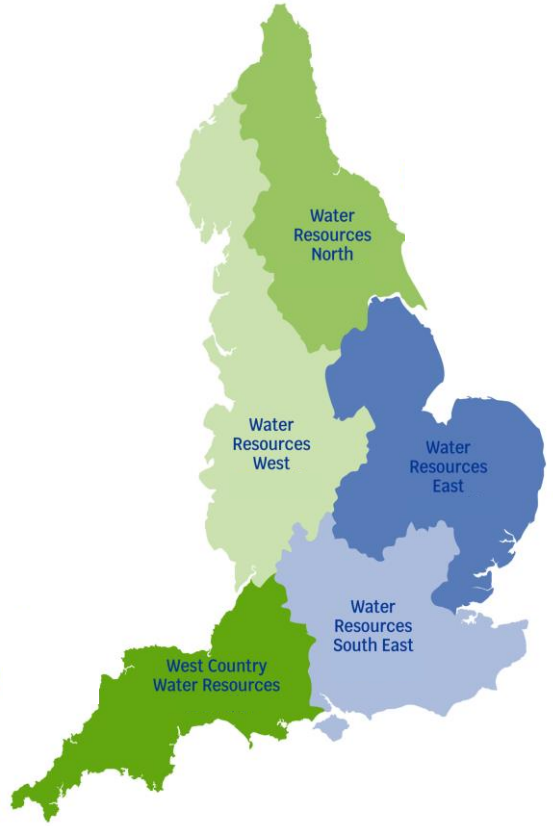

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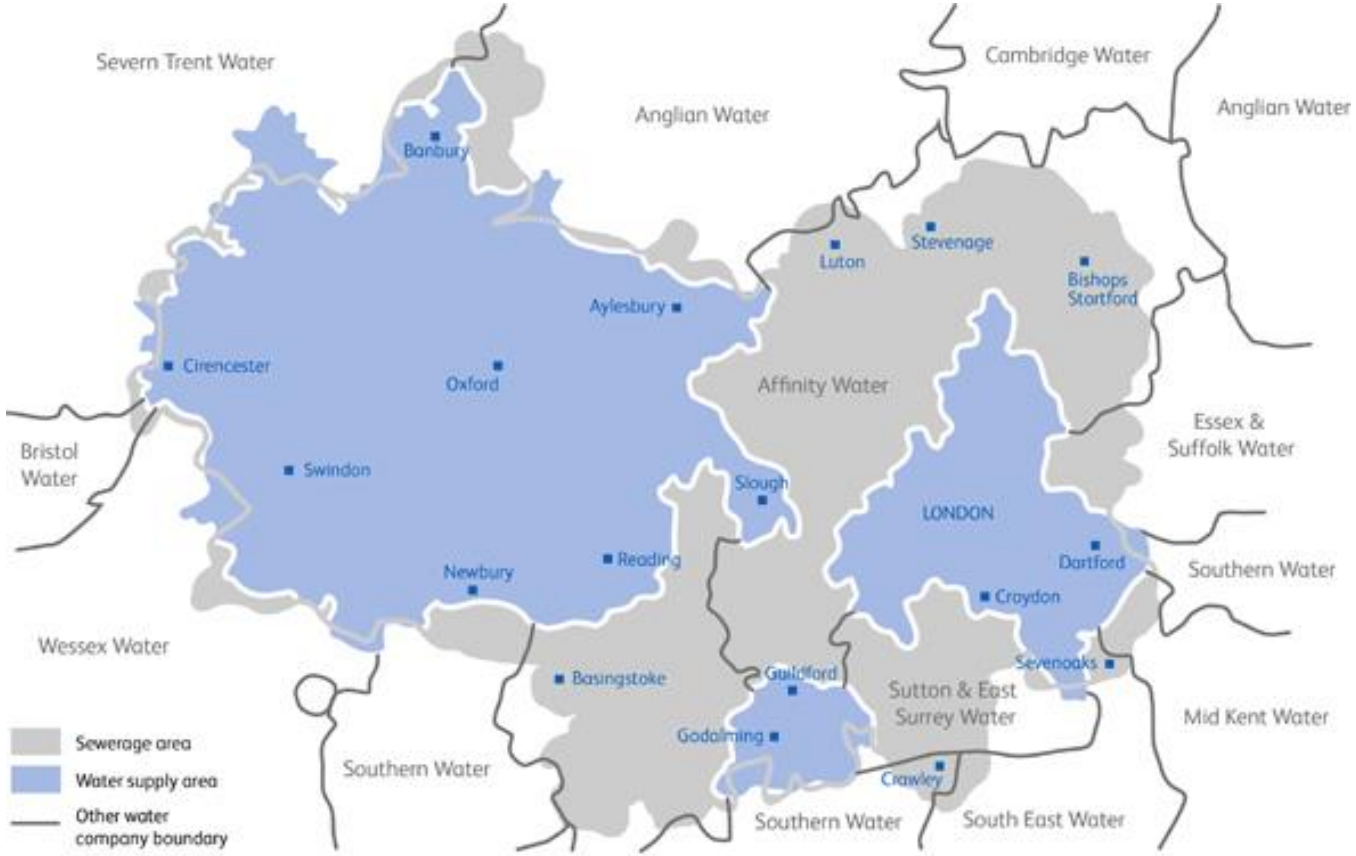

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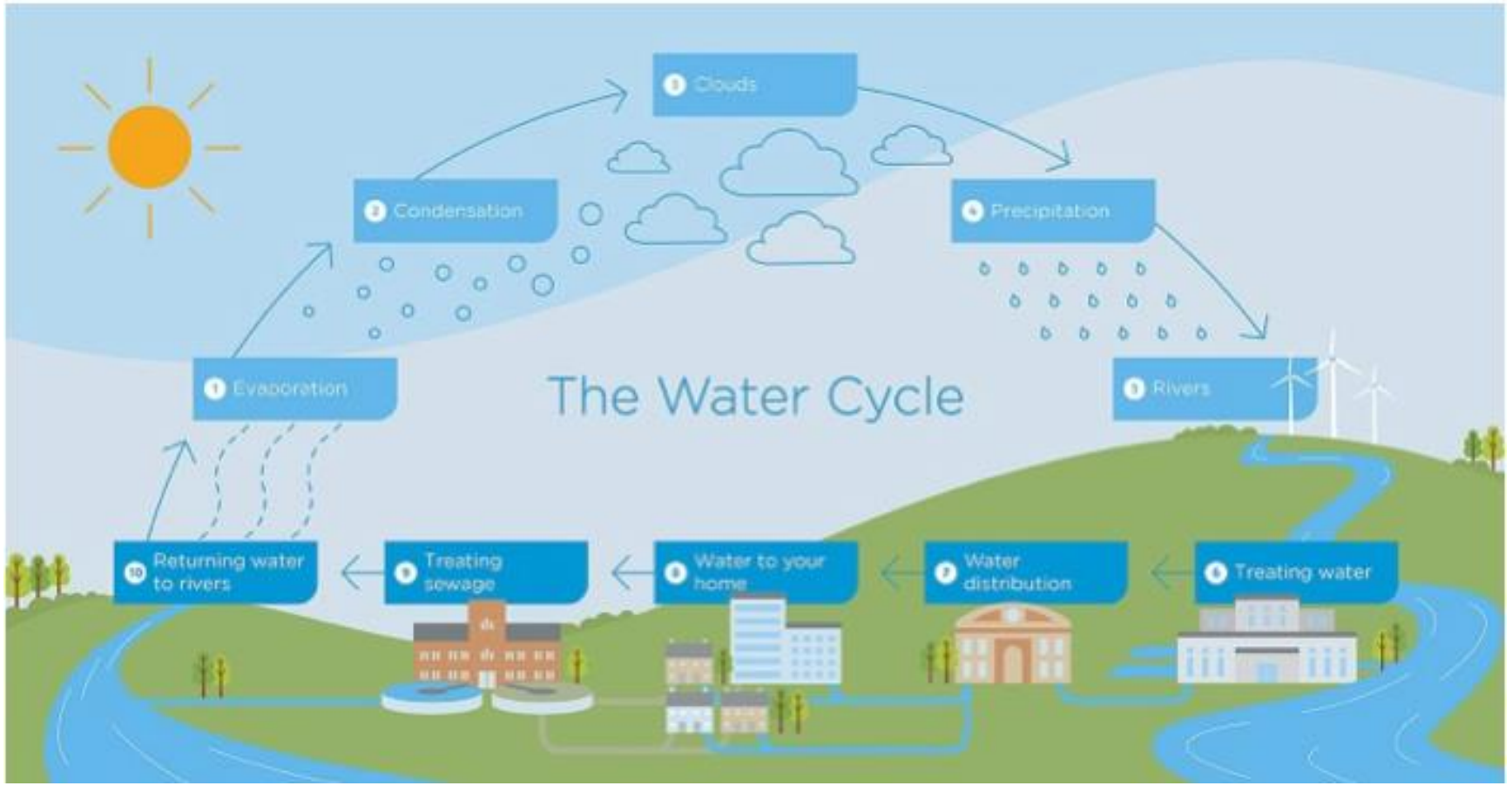

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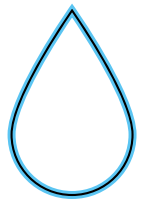

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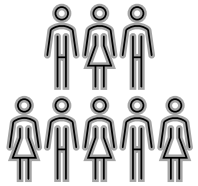

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Deep dive on water

Improving water treatment

What does this involve?

- Thames Water's large London water treatment works are open to the elements and there is a risk of dangerous bacteria passing through into drinking water.

Where is Thames Water now?

- The treatment tanks at all of Thames Water's large London water works are open to the elements, but the quality of drinking water remains very high.

How does Thames Water compare to other water companies?

- Thames Water's water quality levels are close to the average compared with other water companies in the country.
- Thames Water will need to treat poorer quality water in future as the risk of dangerous bacteria is increasing due to climate change and the requirement for water companies to take less water from sensitive rivers and streams.

How could Thames Water do more and go further by 2030?

- Cover up parts of its large London water treatment works to reduce the risk of dangerous bacteria for up to 3.1 million of its 11 million water customers.

Replacing lead pipes

What does this involve?

- There are a small number of instances when drinking water contains tiny amounts of lead, picked up from lead pipes.
- Lead can be harmful to health, particularly for young or unborn children.

Where is Thames Water now?

- There are over a million lead pipes in Thames Water's network, and around the same amount within customer properties.
- Thames Water currently replaces around 10,000 lead pipes each year.

How does Thames Water compare to other water companies?

- Thames Water have more lead pipes than any other water company because it covers more people and properties than others.
- London and other towns in the region are more likely to have older water networks containing lead pipes, which were commonly installed up until the 1970s.

How could Thames Water do more and go further by 2030?

- Replace up to another 70,000 lead pipes – 6% of the total.
- Help schools to replace lead pipes and help customers replace lead pipes on their properties.

Replacing trunk mains

What does this involve?

- Trunk mains (very large water pipes) in London are often under main roads and near to private homes. If these pipes burst, they can flood properties with basements very quickly.
- Replacing these trunk mains will protect the properties at highest risk of flooding.

Where is Thames Water now?

- There are 60,000 high risk properties with basements that could flood from trunk main bursts.

How does Thames Water compare to other water companies?

- This is a fairly unique problem to Thames Water (and London in particular) as the trunk mains are very old and there are a lot of properties with basements that flood easily compared to other cities (such as Birmingham or Manchester).

How could Thames Water do more and go further by 2030?

- Replace trunk mains to protect up to 5,000 basement properties at highest risk of flooding – out of a total of 60,000 basement properties.

Improving water supply reliability

What does this involve?

- The water network can sometimes experience breakdowns or damage which can cause customers to have periods of low water pressure or no water at all.
- Most problems are fixed within a few hours, but very rarely customers can be without water for longer than 2 days. In previous research, customers have told Thames Water that interruptions of longer than 2 days once in a lifetime are unacceptable.

Where is Thames Water now?

- Thames Water is completing a detailed assessment of all properties in its supply area and has so far identified 1.9 million of 4 million properties that are at risk of being without water for longer than 2 days.

How does Thames Water compare to other water companies?

- Thames Water has more properties than other water companies at risk of unacceptable interruptions to water supply due to the age and layout of its water network.

How could Thames Water do more and go further by 2030?

- Build more pipes around weak points on the network and at treatment works so that water can still be moved around and supplied to customers.
- Improve how water supplies are connected together, including sharing water supplies with other companies across the south-east.
- This would protect up to 2.3 million properties from an unacceptable interruption of longer than 2 days once in a lifetime.

Deep dive on wastewater & rivers

Reducing sewage flooding from very heavy storms

What is this about?

- Sewer flooding in homes, gardens and businesses can happen either when sewers become blocked, or after heavy rainfall when the sewer system becomes full due to too much rainwater.

Where is Thames Water now?

- About 1,100 customers per year experience sewer flooding on their properties.
- 350,000 properties out of 6 million are at risk of flooding from a very heavy storm that on average happens once in 50 years.

How does Thames Water compare to other water companies?

- The number of properties flooding from blocked sewers in the Thames Water region is about average for the industry (2.3 sewer floods for every 10,000 properties compared to the best company having 1.3 and the worst having 4.5 for every 10,000 properties).
- However, in years when it rains heavily or is wet for a long period of time, Thames Water performs poorly compared to other companies.

How could Thames Water do more and go further by 2030?

- Build ‘nature-based solutions’ to slow down and stop rainwater from getting into sewers and causing sewers to fill up and flood
- Fix leaky sewers that allow ground water to get in during very wet periods of weather
- Reduce the number of customer ‘misconnections’ into sewers, e.g. rainwater from roofs
- This will reduce the chance of up to 18,000 properties being flooded by heavy storms that on average happen once in 50 years

Reducing sewage spills into rivers

What does this involve?

- When it rains heavily, the sewer network can become overloaded causing diluted sewage to sometimes spill over and pollute rivers and streams
- The Government has set legal requirements to reduce sewage spills, with a long-term target and minimum performance levels set every five years. Thames Water can set more ambitious targets to make quicker progress towards achieving the long-term target.

Where is Thames Water now?

- In 2020 there were around 18,400 spills into rivers in the Thames Water region – lasting for around 216,000 hours. This is about 40 spills per storm overflow each year on average.

How does Thames Water compare to other water companies?

- Thames Water has one of the lowest total number of spills each year compared with other companies, but one of the highest spill rates per storm overflow.

How could Thames Water do more and go further by 2030?

- Reduce the number of customer 'misconnections' into sewers, e.g. rainwater from roofs
- Increasing the size of our sewerage system to hold and treat more sewage
- This will reduce the duration of sewage spills into rivers each year by up to 50%

Improving river health

What is this about?

- At the end of the sewage treatment process, the treated water is returned safely to nearby rivers and streams.
- If this water contains high levels of nutrients, such as the mineral phosphorus, this can lead to extra growth of river weeds and algae and cause problems for plant life and wildlife in rivers
- The Government has set legal requirements to reduce the amount of phosphorus entering rivers by 2035 with a minimum performance level set for 2030. Thames Water can set more ambitious targets to make quicker progress towards achieving the 2035 target.

Where is Thames Water now

- By 2025 Thames Water will be removing around 75% of phosphorus entering rivers from our sewage treatment works

How does Thames Water compare to other water companies?

- It is difficult to compare Thames Water's performance on phosphorus removal with other companies, as all companies are set different targets depending on the rivers in their areas

How could Thames Water do more and go further by 2030?

- Improve the sewage treatment process further still to remove up to 90% of the phosphorus from the treated water entering rivers

Reducing carbon emissions

What does this involve?

- Thames Water is removing fossil fuels from its main operational processes to reduce carbon emissions, this will help reduce the impacts of climate change.

Where is Thames Water now?

- Thames Water has removed over half of its operational carbon emissions, mainly by generating green energy from sewage treatment which provides a quarter of Thames Water's electricity needs.

How does Thames Water compare to other water companies?

- Thames Water's current operational carbon emissions is about average for the water industry
- All water companies in the country are signed up to the ambition of achieving 'net zero' operational carbon emissions by 2030.

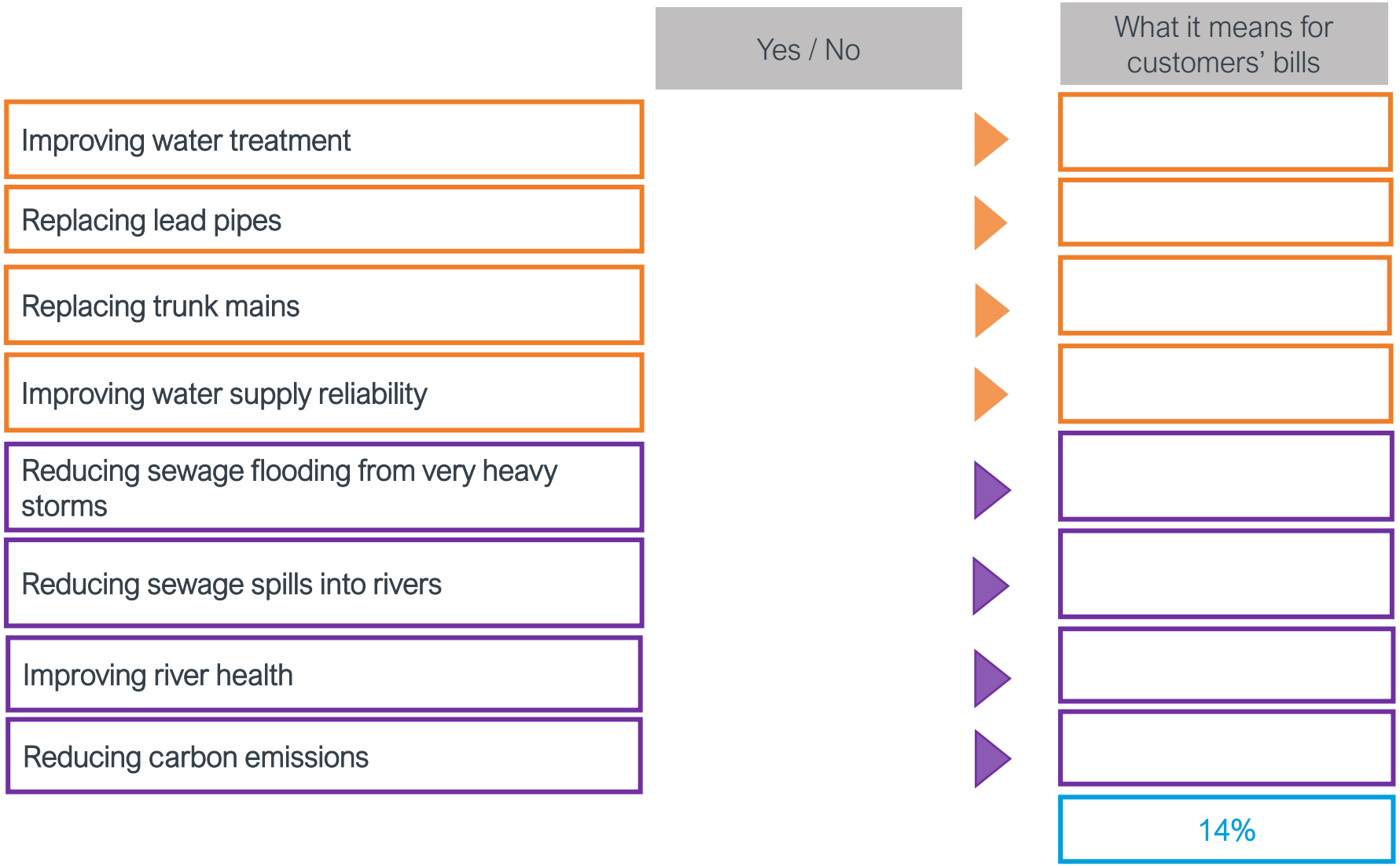
How could Thames Water do more and go further by 2030?

- Use multiple technologies to produce green energy and use excess heat from the sewage treatment process
- Trial new sewage treatment processes to reduce greenhouse gas emissions
- Use a 100% electric vehicle fleet by 2030 for all vans and trucks
- This will help Thames Water achieve 'net zero' operational carbon emissions by 2030

How would you spend £60 of your water bill?

	Yes / No	What it means for customers' bills
Improving water treatment		
Replacing lead pipes		
Replacing trunk mains		
Improving water supply reliability		
Reducing sewage flooding from very heavy storms		
Reducing sewage spills into rivers		
Improving river health		
Reducing carbon emissions		
		£60

How would you spend 14% of your water bill?



Qualitative discussion guide

Thames Water: PR24 Options

Customer workshop Discussion Guide (Combined water and wastewater) | Draft

Objectives

- Understand customers initial reactions to Thames Water's broad plans for core service improvements and specific enhancements in the future.
- Explore and understand customers current priorities toward service enhancement, and how these do or don't align with Thames Water's plans for the future.
- Understand how customers feel about specific enhancement propositions within each service area, including how they weigh up timeframe vs bill implications
- Explore and understand how customers weigh up 'packages' of enhancement propositions brought together from different service areas, including how they weigh up timeframe vs bill implications

The purpose of this document is to serve as a guide to inform the flow of the discussions, rather than a definitive list of questions to cover. As these are qualitative sessions, the moderator will use the guide flexibly and be guided by what comes out of the discussions. In this discussion guide, instructions to the moderator are *italicized* and core tracking questions are in **bold**.

Section	Key discussion points and probes	Stimulus	Time
Pre-reading	*Participants asked to read introductory info on the water industry and Thames Water.*	-	-
Section 1: Welcome & Introductions **(Plenary and breakouts)**	Lead facilitator to welcome participants to the event: SLIDE 2- • Firstly, we'd like to say a huge thank you to you all for joining us today and for agreeing to take part in this project. We think it's going to be really exciting, and we are all very pleased to have you with us for this project. • This work has been commissioned by Thames Water but is being run by BritainThinks – we are an independent research consultancy, and we work with	• Welcome slides • Introductions • Pre-read slides • Quiz	20 (20)

	clients like Thames Water to help them understand what people think, and how they can better serve their customers. • [SLIDE 3 – WHY ARE WE HERE?] We are running four workshops in the Thames Water region with 78 households and businesses to understand your thoughts and feelings toward some plans Thames Water are considering to improve its service in the future. • As a research company, we abide by the Market Research Society Code of Conduct and (it goes without saying) GDPR legislation. We will never pass your contact details on to any third party and will not include your name within our research reports. • The only exception to this is if you say something that gives me reason to think you or someone else is at risk of harm. In the unlikely event that this happens, we may be legally obliged to pass this information on to the relevant authorities. • Soon we will be splitting off into break-out groups for discussions, and in this time, we will ask to record the sessions. These recordings will be held by BritainThinks only and used purely to help us when it comes to analysing the results of the research. In the room this evening we have: [SLIDES 4 and 5] • The BritainThinks team, who will be leading you through the conversations and are also here if you have any practical questions about the research • Several Thames Water colleagues who are here to help answer any questions you have about the process but are also really keen to hear your thoughts. *Moderator to hand over to Thames Water colleagues to introduce themselves individually, explaining that they are there to listen and ask questions.* *Lead facilitator to then share slides with an overview of the agenda and how we will work together.* [SLIDES 6 AND 7] *Lead facilitator to then explain that first we will do a quick pub quiz to test recall of the pre-read task. Each person to raise their hands with what they think is the correct answer.* [SLIDES 8-14]		

	1. **What is the name of the regulator that makes sure water companies do their job properly?** a. Ofsted b. Defra c. Ofwat (correct answer) d. CCW 2. **How many water companies serve England and Wales?** a. 15 b. 5 c. 30 d. 17 (correct answer) 3. **On average, how many litres of drinking water does Thames Water supply to businesses and homes every day?** a. 3.4 billion b. 1.2 billion c. 5.5 billion d. 2.7 billion (correct answer) *Lead facilitator to explain we will now move into break-out groups.*		
Section 2: Introduction to the water industry and to Thames Water **(Plenary and breakouts)**	*[SLIDE 15] Breakout group facilitator to welcome participants, introduce themselves and any observers around the table. Obtain consent to record the group and turn on recording.* *Ask participants to introduce themselves one by one, covering off:* • **Your first name** • **A bit about yourself, your home/business (and who you live with)** • **[For HH customers] If you are working, what do you do?** • **[For NHH customers] What is your role in the business?**		10 minutes (30)

	Moderator to explain that we now want to hear their thoughts on the information from the pre-read, referring back to this information in their own stimulus deck if needed [slides 16 – 22] • **What are your thoughts about this information? Why?** *Moderator probe to understand any elements that are 'new news'.* • **How do you feel about the challenges faced by Thames Water?** o Which, if any, are you most concerned about? Why? o What, if anything, is missing from this? o What, if any, expectations do you have from Thames Water when it comes to addressing/responding to these challenges?		

Section 3: Thames' broad plans **(Plenary and breakouts)**	[SLIDE 24] *Lead facilitator to introduce core service areas, explaining that:* • *For household customers this includes Water, Wastewater and Rivers as well as Customer Service.* • *For business customers, this includes Water and Wastewater. Customer Service is provided by the water retailer (i.e. who they pay their bills to)* *Lead facilitator to then explain where Thames Water is now in relation to each of these areas, and what its plans are for improving service across the core areas of Water and Wastewater and Rivers by 2050 (slides 25-26).* [Slide 25]: *For 'Average litres of water used, per person, per day' explain that a standard bath holds around 80 litres of water – so currently each person in the Thames Water area uses nearly two baths full of water every day (147 litres).* *Lead facilitator to explain that for the purposes of this session we won't be examining plans for Customer Service (note for moderators: please still capture anything that crops up on customer service)* *Lead facilitator to introduce the idea of 'raising the bar', explaining that:* • *This is a proportion of their bills, not an additional charge* • *This is currently already part of their bill, and Thames customers currently are already doing many raising the bar activities* • *This refers to additional improvements beyond the ones already outlined* • *Whilst the core improvements are non-negotiable, customers can have more say over raising the bar activities.* *Lead facilitator to clearly explain that we will be looking at the impact of these changes are on customers' bills, (slide 27-30) explaining that:* • *For household customers, (slides 27-28) most of their bill (86%) is allocated on standard core service improvements, and only a small part of it (14%) would be used for additional improvements to improve the service further in specific areas not covered by the core service.*		15 – 5 mins to present, 10 mins to discuss (45)

	• *For business customers, (slides 29-30) most of their bill (86%) is allocated on standard core service improvements, and only a small part of it (14%) would be used for additional improvements to improve the service further in specific areas not covered by the core service.*
	Split into break-out groups to reflect on the information shared.
	• **What are your initial reactions to what you have heard? Why?**
	  o What if anything do you feel positive about?
	What if anything are you concerned about?
	• **Was there anything new or surprising about what you just heard?**
	• **Thinking broadly first of all, what areas, if any, do you think Thames Water should be prioritising? Why?**
	• **What do you see as less of a priority? Why?**
	• **What impact if any do you think these improvements will have on you personally/your business? And on your local area? And the Thames region more broadly?**
	• **What are your thoughts on how customers' bills are split? Why?**
	Moderator to probe on whether they understand the distinction between the two types of service improvements and explain if they feel unclear, emphasising that improvements will be made as part of the core service due to Thames Water's targets and 'raising the bar' is in addition to these improvements.
	  o What if anything do you like?
	  o What if anything are you concerned about?		

Section 4: Focusing on water – potential enhancements **(Plenary and breakouts)**	*Break-out group moderators to explain that we will now be focusing the conversation specifically on 'water' reminding participants what is included in "water".* [SLIDE 33] *Moderators to go through potential enhancements ('raising the bar') for water, including the goal, what is involved, and the benefits. Explain that the activities listed are just some of the ways Thames Water will achieve its 2050 goals in each area* [SLIDE 34]. *Also explain that these things will happen in addition to the improvements already discussed in the previous section.* *Then ask:* • **How do you feel about Thames Water's plans to do more and go further in relation to water improvements? Why?** • **Which, if any, do you see as most important? And least important? Why?** • **What do you think the benefits might be? And the drawbacks?** • **What impact, if any, do you think they will have on you as a customer/your business? Why?** *Moderator to probe on supply consistency / disruptions, impacts on bills, impact on water quality / taste, impact on environment etc.* • **Do you feel anything is missing? If so, what?**		10 – 5 mins to present, 5 mins to discuss (55)

Deep dives on replacing lead pipes, replacing trunk mains, improving water supply resilience
 	
(Breakout groups)
	Moderator to explain that we are now going to discuss some of these ideas in more detail. Moderator to read through slides 37-40 on improving water service, including what it involves, where Thames Water is now, how it compares to other companies, and what more it could be doing to improve further by 2030. After each slide moderator pause and ask:
	• **What are your impressions of this? Why?**
	• **What if anything do you feel positive about? What if any concerns do you have?**
	• **What if any impact do you think this will have on you personally/your business? What about your community?**
	• **To what extent, if at all, do you support going further in this area?**
	  ○ **How quickly should changes be made?**
	  ○ **How far should the changes go?**
	• **How, if at all, ambitious does going further in this area feel to you?**
	• **How urgent, do you think it is for Thames Water to go further in relation to this area?**
	• **Have your views on this area changed or become more or less important to you over time? Why? Have they changed recently? Why?**
	Once all have been reviewed ask:
	• **Having seen all of these ideas, which are you most supportive of? Why?**
	• **Which areas of you less supportive of? Why?**
	Is there anything key that you think is missing? *Moderator to focus answers on areas relating to water, not for example customer service or wastewater*
			30– 5 mins per slide, 5 mins summary
			(85)

Break – 5(90)			

Section 5: Focusing on wastewater – potential enhancements **(Plenary and breakouts)**	*Lead facilitator to read through what is included in "wastewater".* [SLIDE 42] *Lead facilitator to go through potential enhancements for wastewater, including the goal, what is involved, and the benefits. Explain that the activities listed are just some of the ways Thames Water will achieve its 2050 goals in each area.* [SLIDE 43] *Split into break-out groups to reflect on the information shared.* • **How do you feel about Thames Water's plans to do more and go further in relation to waste improvements? Why?** • **Which if any do you see as most important? And least important? Why?** • **What do you think the benefits might be? And the drawbacks?** • **What impact if any do you think they will have on you as a customer/your business? Why?** *Moderator to probe on disruptions, impacts on bill, impacts on the environment, etc.* • **Do you feel anything is missing? If so, what?**		10 mins – 5 mins to present, 5 mins to discuss (100)

Deep dive on wastewater – reducing sewage flooding, reducing sewage overflows, improving river health, reducing carbon emissions
 	
(Breakout groups)
	Moderator to explain that we are now going to discuss some of these ideas in more detail. Moderator to read through slides 46-49 on improving wastewater treatment, including what it involves, where Thames Water is now, how it compares to other companies, and what more it could be doing to improve further by 2030. After each slide moderator pause and ask:
	• **What are your impressions of this? Why?**
	• **What if anything do you feel positive about? What if any concerns do you have?**
	• **What if any impact do you think this will have on you personally/your business? What about your community?**
	• **To what extent, if at all, do you support going further in this area?**
	  ○ **How quickly should changes be made?**
	  ○ **How far should the changes go?**
	• **How, if at all, ambitious does going further in this area feel to you?**
			30 – mins per slide, 5 mins summary
			(130)

	• **How urgent, do you think it is for Thames Water to go further in relation to this area?** • **Have your views on this area changed or become more or less important to you over time? Why? Have they changed recently? Why?** *Once all have been reviewed ask:* • **Having seen all of these ideas, which are you most supportive of? Why?** • **Which areas of you less supportive of? Why?** • **Is there anything key that you think is missing?** *Moderator to focus answers on areas relating to water, not for example customer service or water*		
Section 6: Introducing packages **(Plenary and breakouts)**	*Lead facilitator to present the broad packages of 'raising the bar'.* *For household customers: Explain that Thames Water will have a fixed amount to spend on raising the bar. Each potential package will cost roughly the same – around £60 of the average household bill by 2030 will go towards these improvements. Moderator to frame enhancements as incremental improvement, not a yes or no option.* *Facilitator to clearly explain slides 52-55. The number of ticks = shows how much progress will be made in this package compared to what Thames Water thinks is the maximum possible by 2030, and the cross = not included in the package. Moderator to frame enhancements as incremental improvement, not a yes or no option. Moderator to also encourage participants to focus on the full descriptions of the enhancements, not just the ticks and crosses.* *In breakouts, moderators to give slides 52-55 as handouts to respondents for them to review and ask:* • **What are your thoughts on these different packages?** *Moderator probe to understand perception of use of packages overall and any spontaneous thoughts on the packages themselves*		30 (160)

	• **What, if anything, do you like? And what, if any, concerns do you have?** • **Which, if any, of the packages do you prefer, and why?** • **Which package do you like the least, and why?** *For non-householder customers: Explain that Thames Water have control over a fixed percentage of their overall bill to put toward raising the bar. Each potential package will account for roughly the same percentage – around 14% will go towards these improvements.* *Facilitator to clearly explain slides 61-64. The number of ticks = shows how much progress will be made in this package compared to what Thames Water thinks is the maximum possible by 2030, and the cross = not included in the package. Moderator to frame enhancements as incremental improvement, not a yes or no option. Moderator to also encourage participants to focus on the full descriptions of the enhancements, not just the ticks and crosses.* *In breakouts, moderators to give slides 61-64 as handouts to respondents for them to review. Then go through each element of each package with them, probing to understand their views on each goal and bill amount.* *Once all have been covered:* • **What are your thoughts on these different packages?** *Moderator probe to understand perception of use of packages overall and any spontaneous thoughts on the packages themselves* • **What, if anything, do you like? And what, if any, concerns do you have?** • **Which, if any, of the packages do you prefer, and why?** • **Which package do you like the least, and why?** *If participants feel all elements of all packages are important, probe to understand a sense of prioritisation.*		

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Section 7: Final choices and trade-offs **(Breakout groups)**	*Moderators to explain that we will now be doing a 'trade off exercise'. Moderator to ask participants to pick their favourite package and then determine how they would make it better. They do not need to include everything – they can invest in a small number of areas if they like.* *Participants can use the packages print out for guidance on cost / goals.* *For household customers: They must imagine that they have £60 to spend on the various, different elements. They must decide which is most important.* *For non-household customers: They must imagine that they are in charge of the 14% left of their bill to be used the various different elements. They must decide which is most important.* *In journals using the template provided, each customer creates their mini-plan to reflect their overall priorities, any trade-offs inherent and their broad view of packaging up the enhancements by filling in the amount that they would spend on each element and making note of their priorities in the space provided. If participants are struggling, ask them to start with their preferred package and then make any desired changes from there. Encourage participants to use their phones or a calculator to do the maths to add up.* *Once done ask:* • **What are the 3 non-negotiables in your package? Why?** • **Imagine you worked at Thames Water and needed to make a case for making sure your 'non-negotiables' were taken forward. What would you say?**		20 (180)
Wrap up **(plenary)**	*Lead facilitator to thank all participants for their contributions and ask if anyone in the room has any final thoughts, questions or reflections.*		- (180)

	If time permits, lead facilitator to then do a final voting exercise, asking participants to vote on which package (A-D) they preferred and why. For each, ask why they prefer this one, probing on specific elements that are most important and why.		

Qualitative stimulus

PR24 stimulus
Customer workshops
(HH & NHH combined service)

Welcome!

Why are we here?

- Thames Water regularly engages with customers in order to understand their views, needs and priorities. This understanding is used to inform Thames Water's planning and service delivery every day.
- In particular, Thames Water want to understand customer views on their plans for improving their delivery of water and wastewater services in the Thames Water region.
- The research comes as part of a series of engagements with customers as they seek to understand how you feel about their plans for the future. It's also important to know that Thames will definitely take account of your views – it's not the case that any decisions have already been made.
- It sounds complicated – but don't worry! We'll be giving you all the information you will need to come to an informed view on the key questions that Thames Water have for their customers!

Who's in the room?

We are BritainThinks, an independent research company, whose job it is to understand what people like you think about important issues that affect citizens all around the country.

Britainthinks
Insight & Strategy

Jenny

Ellie

Nina

Peter

Who's in the room?

We are also joined by colleagues from Thames Water. They will be listening to our discussions this evening as they are really interested in hearing what you all have to say!

What we will cover today

Insert time	Welcome!
18:00 – 18:30	Introductions and a quiz!
18:30 – 18:45	Thames Water's broad plans
18:45 – 18:55	Focusing on water
18:55 – 19:25	Deep dive on water
19:25 – 19:30	Break
19:30 – 19:40	Focusing on wastewater & rivers
19:40 - 20:10	Deep dive on wastewater & rivers
20:10 – 20:40	Exploring potential packages
20:40 – 21:00	Trade offs – Build your own package
21:00	Wrapping up!

How we'll work together

Be curious 	Be kind 	Step forward if you're quiet 	Step back if you're loud 
It's ok to disagree 	Ask if you're not sure 	Keep to time 	Take a break if you need one 

Quiz!

1. What is the name of the regulator that makes sure water companies do their job properly?

A. Ofsted

B. Defra

C. Ofwat

D. CCW

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A. Ofsted

B. Defra

C. Ofwat

D. CCW

Offices of Water Services (Ofwat) is the regulator that makes sure water companies do their job properly, including fair pricing for customers and ensuring there is always a reliable water supply.

2. How many water companies serve England and Wales?

A. 15

B. 5

C. 30

D. 17

2. How many water companies serve England and Wales?

A. 15

B. 5

C. 30

D. 17

England and Wales are served by 17 different water companies: some provide just drinking water, others take away sewage as well. Companies in the same area work together to plan for the future in their region, and work with the other regional groups across England to make sure there is enough water for everyone

3. On average, how many litres of drinking water does Thames Water supply to businesses and homes every day?

A. 3.4 billion

B. 1.2 billion

C. 5.5 billion

D. 2.7 billion

3. On average, how many litres of drinking water does Thames Water supply to businesses and homes every day?

A. 3.4 billion

B. 1.2 billion

C. 5.5 billion

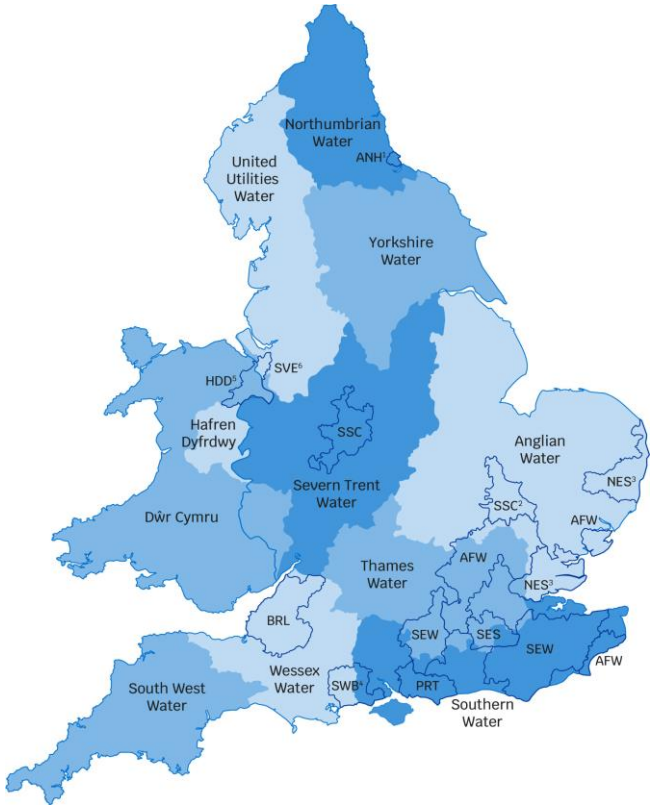
D. 2.7 billion

Thames Water supplies an average of 2.7 billion litres of drinking water every day to homes and businesses and it treats almost 5 billion litres of sewage a day.

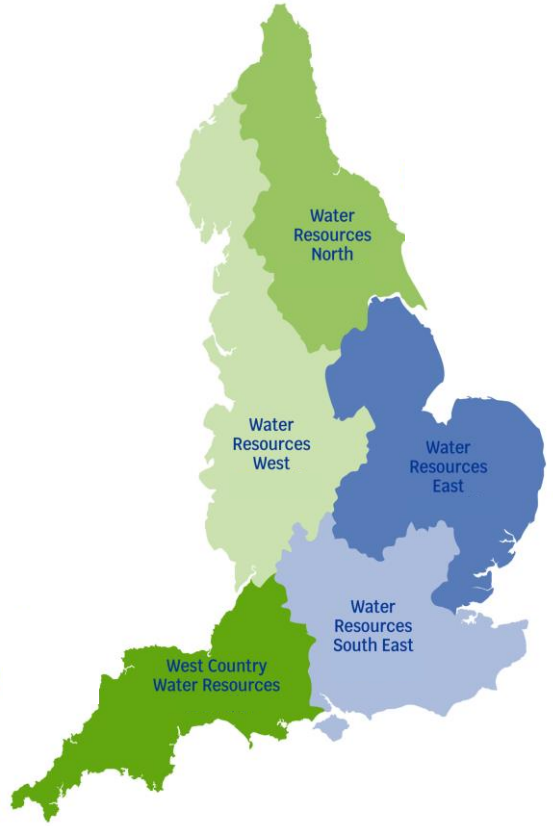
Intro to the water industry and Thames Water

Background to water industry

There are a number of different companies in the water industry who serve water customers to ensure their water is safe, reliable and environmentally friendly



England and Wales are served by 17 different water companies: some provide just drinking water, others take away sewage as well. Companies in the same area work together to plan for the future in their region, and work with the other regional groups across England to make sure there is enough water for everyone.



The water industry today

Water companies

- Take water from the environment (e.g. rivers) and treat it so it's safe to drink
- Build and maintain infrastructure (like pipes) to supply water to homes and businesses

Drinking Water Inspectorate (DWI)

- Makes sure the water supplied in England and Wales is safe and that drinking water quality is acceptable for customers

Consumer Council for Water

- Represent customers on matters relating to water
- Investigate complaints and provide advice to ensure water services remain fair for customers

Environment Agency

- Protects and enhances the environment
- Works with water companies to ensure operations and plans develop in a sustainable way

Defra

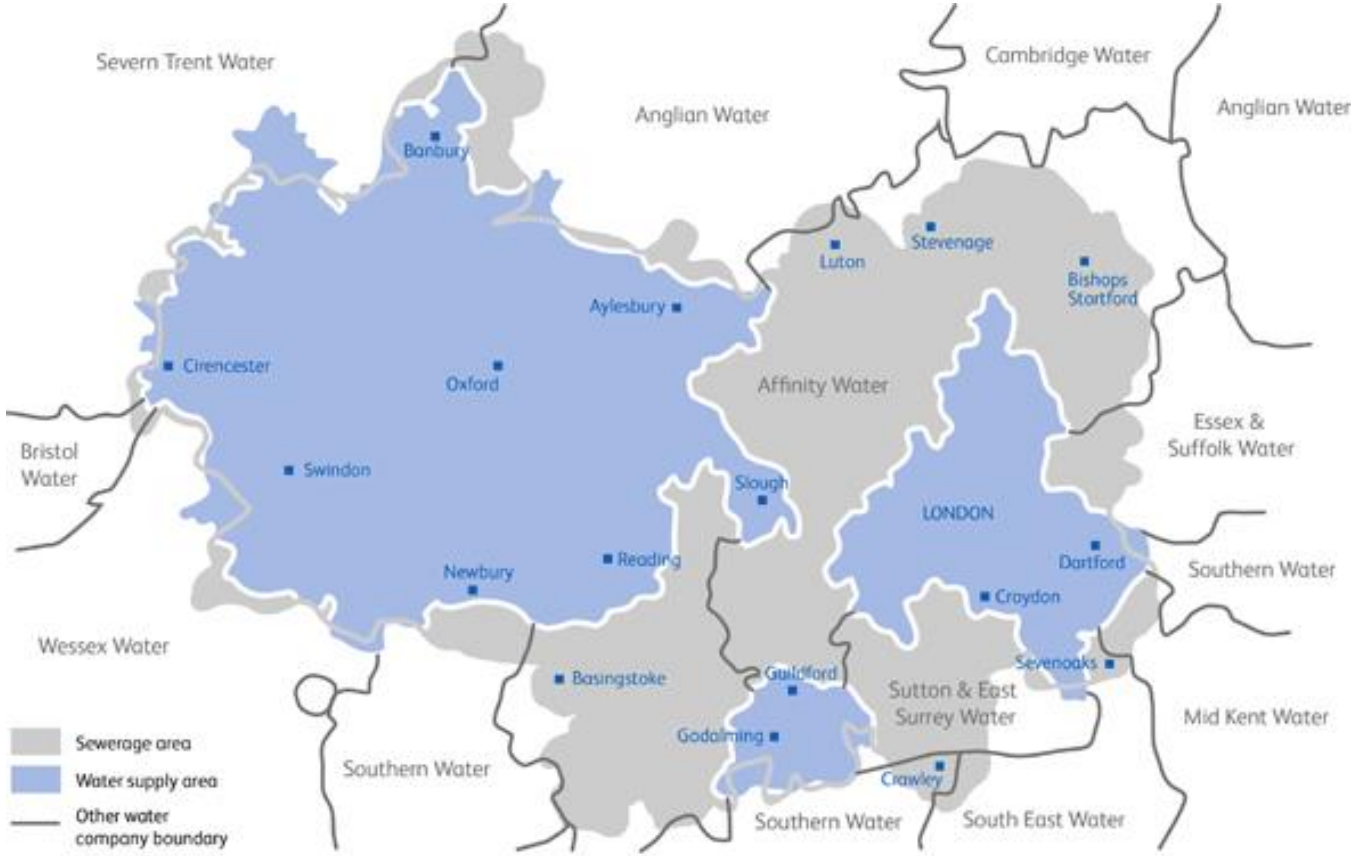
- The UK Government department responsible for protecting the environment and countryside, including water

Office of Water Services (Ofwat)

- A regulator that makes sure water companies do their job properly, including fair pricing for customers and ensuring there is always a reliable water supply

Introduction to Thames Water

Thames Water is the UK's largest water and wastewater services provider



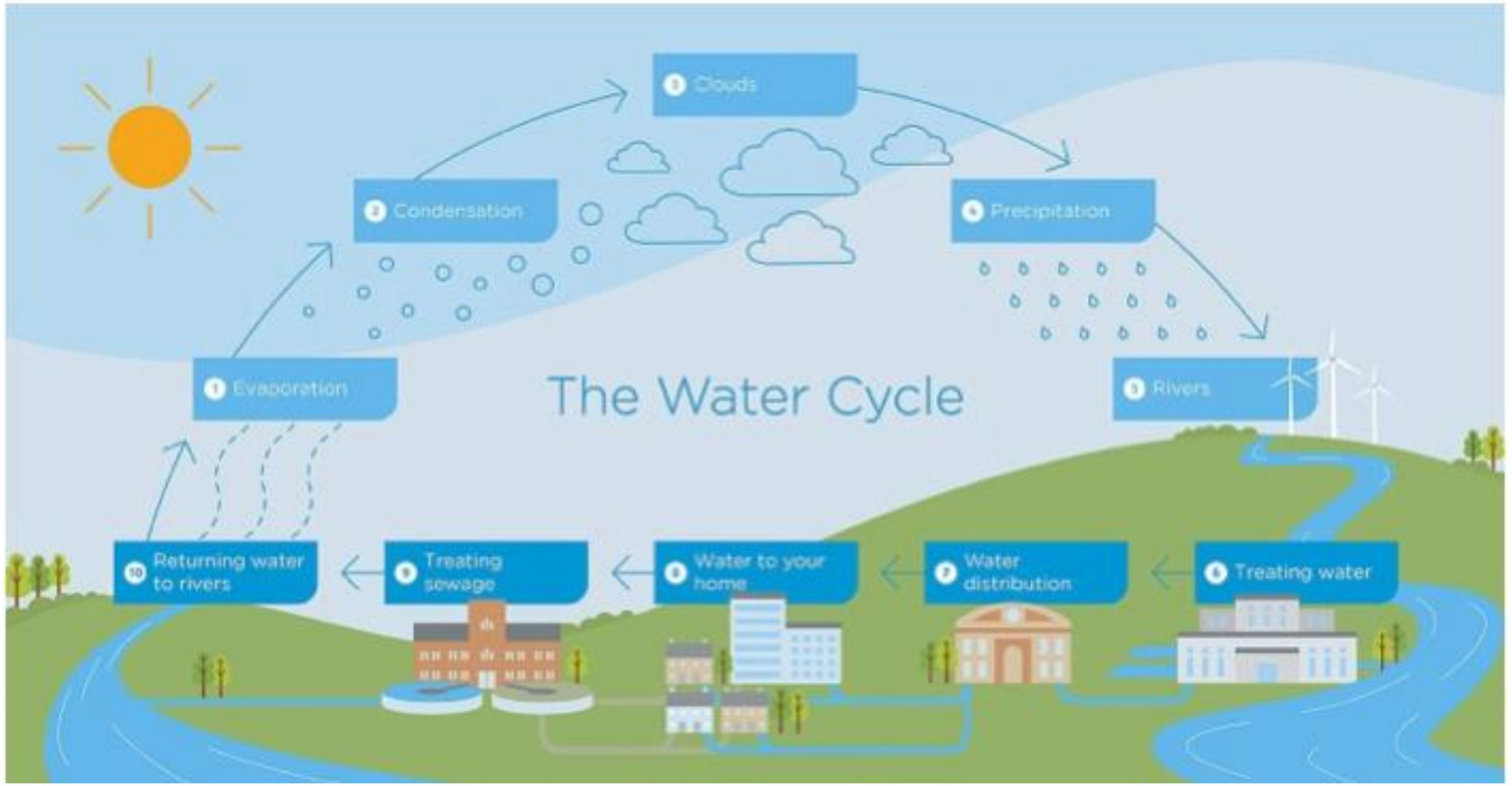
10 million water customers

15 million wastewater customers

Thames Water supplies an average of 2.7 billion litres of drinking water every day to homes and businesses and it treats almost 5 billion litres of sewage a day

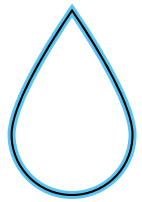
Thames Water and the water cycle

Thames Water takes water from rivers and natural underground stores and turns it into high quality drinking water. It then delivers the drinking water through a water pipe network to homes and businesses. Once the water has been used (i.e., wastewater that goes down sinks and toilets) it is collected in the sewer network. It ends up at sewage treatment works where the water is treated and safely returned to rivers.



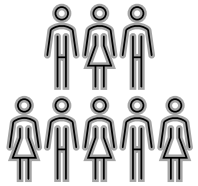
Overall purpose of the project

The main objective is to gain customer feedback on future priorities and service package options



Water companies must meet the needs of their customers

- They must maintain and improve the service in an environmentally responsible way, while facing a number of growing challenges now and in the future.
- In order to ensure they can meet customers' needs and address future challenges, water companies are required to make long-term plans (as far ahead as 100 years).
- The long-term strategy of water companies must be informed by engagement with customers.



The purpose of this project is to gather feedback from Thames Water customers

- Thames Water wants to understand what improvements should be prioritised as they look ahead to their future service.
- Customers will be asked to provide feedback on a number of potential improvements and which of these improvements are most important and/or should be prioritised.
- Your feedback will be used to make sure Thames Water's plans deliver the right balance of outcomes for customers over the next 10-15 years.

Challenges for Thames Water

Thames Water are facing several challenges that must be tackled now, and in the future

• Population growth	• In the future, demand for water will increase as there are more people, more homes and more businesses to supply
• Climate change	• The effects of climate change mean that there will be less water available to meet the increasing demand from customers (e.g. hotter and drier summers could mean more water shortages and risk of drought)
• Declining river quality and biodiversity	• Widespread pollution (e.g. sewage, plastics, chemicals) is threatening freshwater habitats and biodiversity in the UK (currently no UK rivers are officially safe to swim in) • To reduce negative impacts on fish, wildlife, plants and recreation, water companies will be allowed to take less water from sensitive water sources
• Ageing infrastructure	• Old pipe networks and treatment works mean higher maintenance needs and costs • The effectiveness of the infrastructure may also decline with age and may become potential safety hazards

Planning ahead in a meaningful way can help Thames Water to solve some of these challenges and consider how their future plans might impact some of these issues (e.g. reducing leakage can help increase water supply)

Introductions and reflections on the pre-read

For the next 10 minutes, please say hello and introduce yourself to the rest of your table!

Thames Water current improvements

What do Thames Water do?

Household only

Extract water from rivers and aquifers	Clean water so it is safe to use	Take wastewater away (i.e. sewage)	Treat and recycle wastewater	Produce and send bills to customers	Read water meters to produce accurate bills
Deliver water to household and business taps	Fix leaks on pipes	Return water to rivers	Clean up sewage floods and blockages	Make it easy for customers to contact Thames Water	Deal with requests, queries and complaints
Help customers to use less water	Make sure there is enough water in future	Prevent pollution from sewers and sewage works	Produce and use renewable energy	Provide customers with helpful information	Support customers that need extra help
Water		Wastewater and rivers		Customer Service	

Improving water service

Thames Water has set itself ambitious targets to make sure it improves the service it provides to customers.

Goal by 2050	Measurement	Today	By 2030	By 2035	By 2040
Guarantee high quality drinking water	Overall performance of drinking water when tested where 0 = no issues with quality	2.6	2.0	1.5	1.0
Provide a more reliable supply of water	% of properties each year affected by an unplanned interruption for more than 3 hours	6%	4%	2%	1%
Reduce leakage to below 10%	% of water put into supply lost through leaking pipes	23%	19%	18%	16%
Help customers to use much less water at home	Average litres of water used, per person, per day	145	137	131	128

Improving wastewater & rivers service

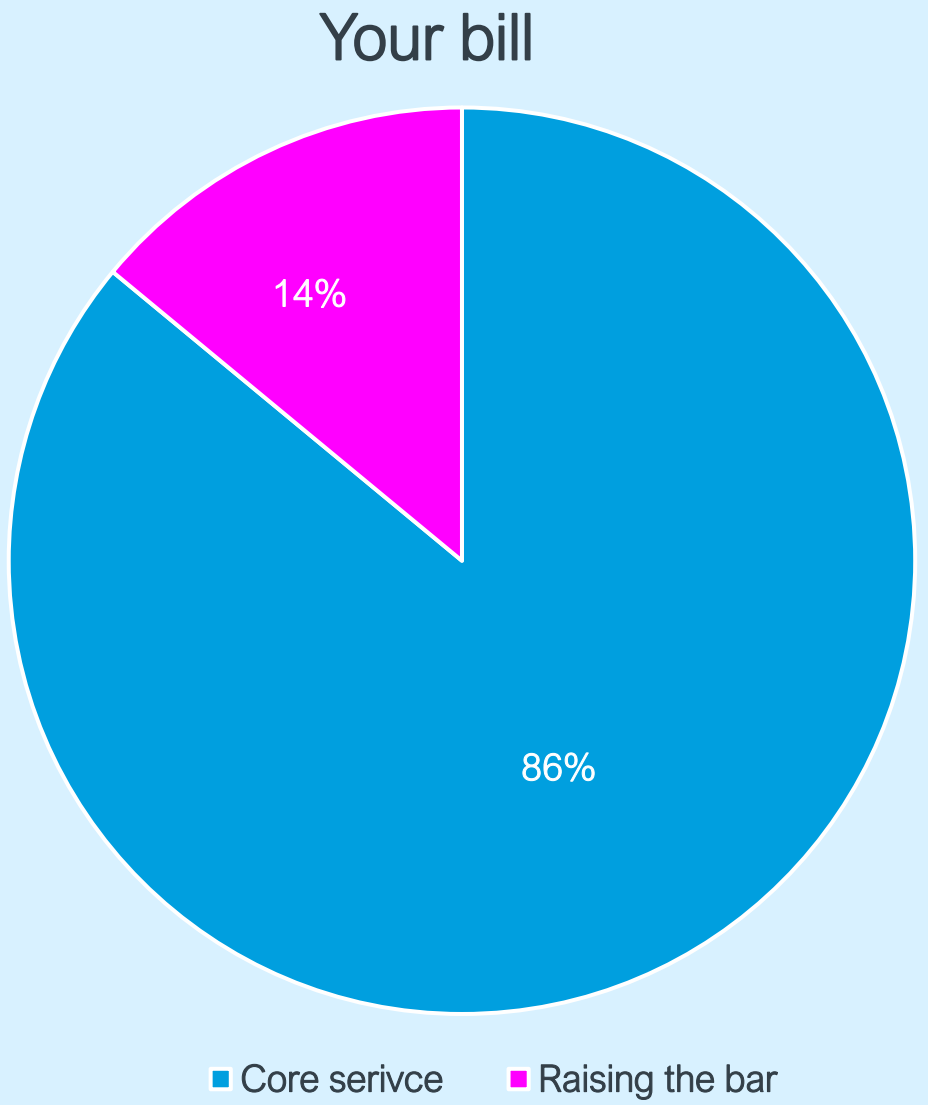
Thames Water has set itself ambitious targets to make sure it improves the service it provides to customers.

Goal by 2050	Measurement	Today	By 2030	By 2035	By 2040
Stop all sewage flooding into homes, gardens and businesses	Number of properties flooded by sewage each year	1,100	800	700	600
Reduce pollution in rivers	Number of pollution incidents each year as classified by the Environment Agency*	245	150	110	80
Lead the improvement of rivers in the region so they become among the healthiest in the UK	Percentage of sewage treatment works meeting standards set by the Environment Agency	98.9	100	100	100

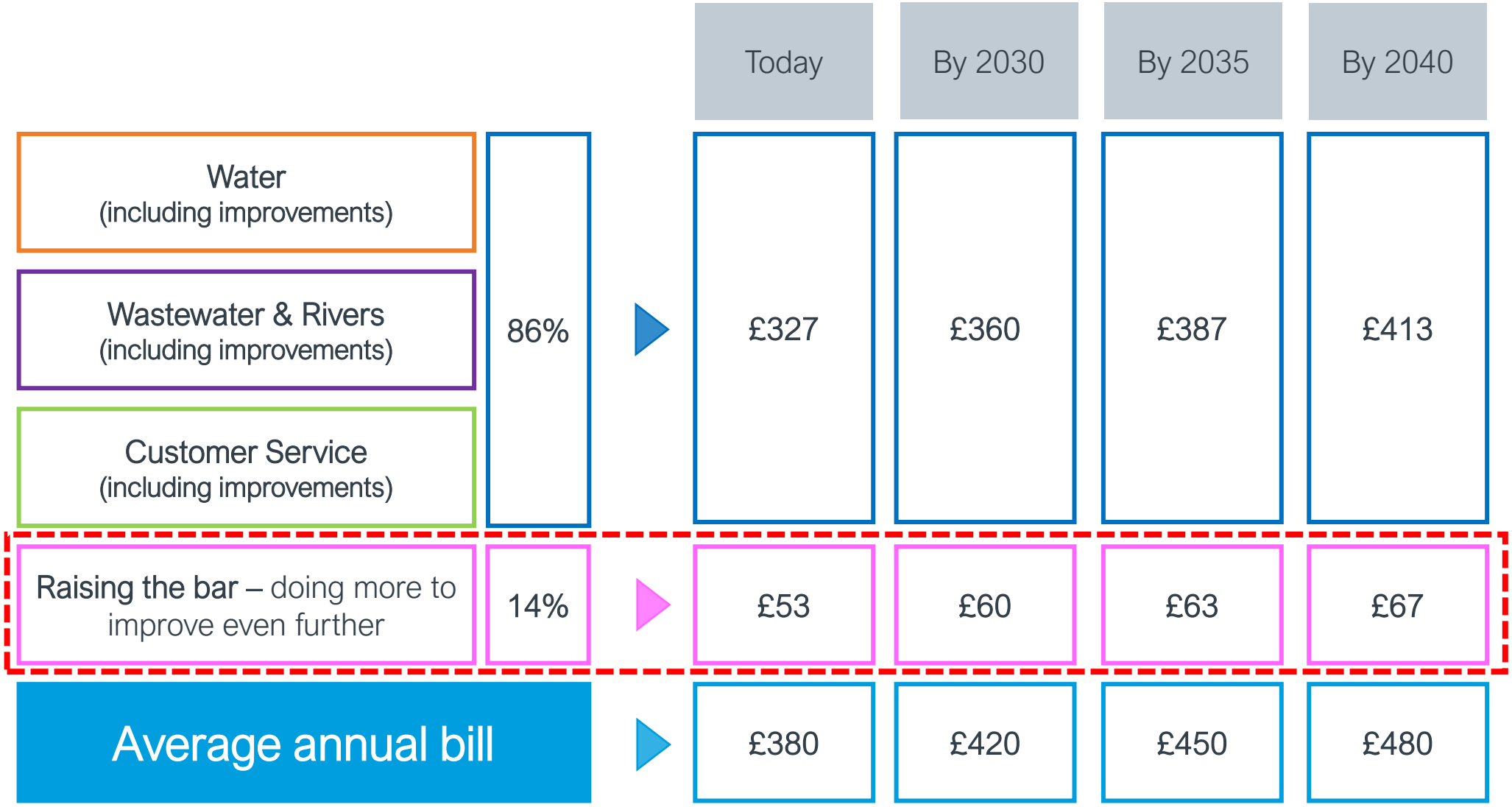
*The Environment Agency is a government department in charge of protecting and enhancing the environment in England.

Household customer bills

- The money you pay to Thames Water each year goes toward a mixture of
  - Core service delivery and improvements (86%) as Thames Water works toward long-term targets, as well as
  - ‘Raising the bar’ improvements (14%) where Thames Water can ‘do more to go further’ to help achieve some long-term targets more quickly.

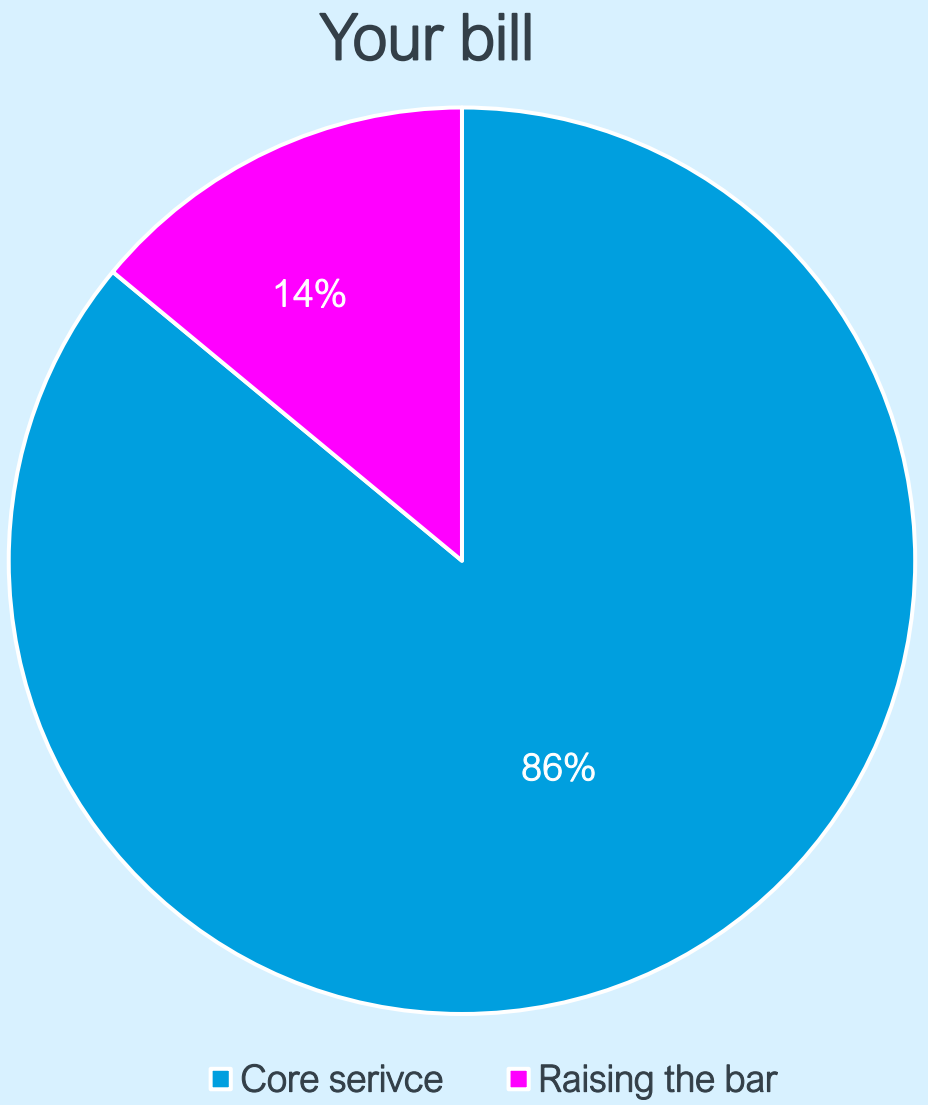


What this means for household customers' bills moving forward

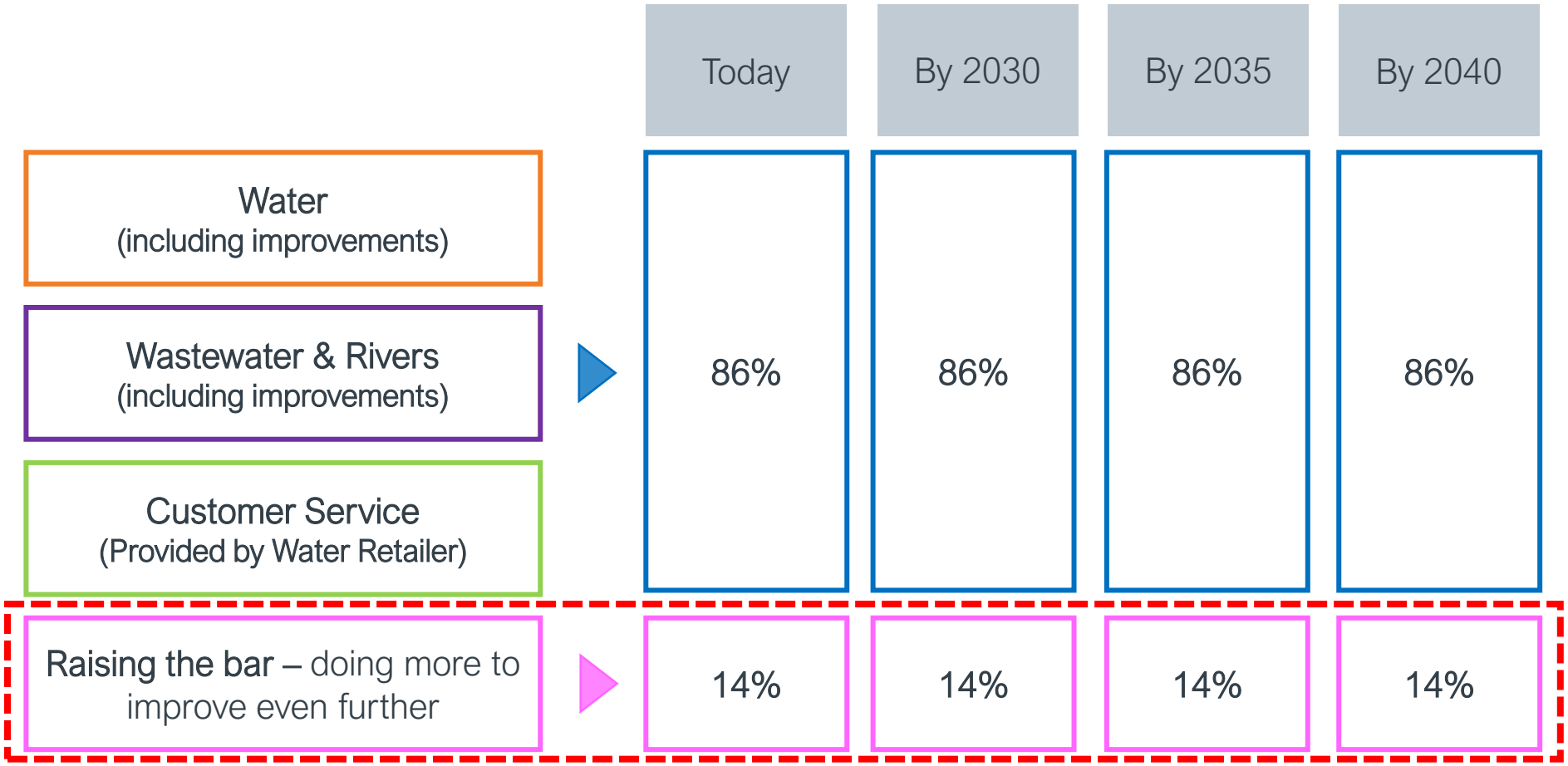


Business customer bills

- The money you pay to Thames Water each year goes toward a mixture of
  - Core service delivery and improvements (86%) as Thames Water works toward long-term targets, as well as
  - ‘Raising the bar’ improvements (14%) where Thames Water can ‘do more to go further’ to help achieve some long-term targets more quickly.



What this means for business customers' bills



Q&A

For the next 10 minutes, we will discuss what you have just heard in more detail

Focusing on water

(combined customers only)

We are going to focus on water only for now

Extract water from rivers and aquifers	Clean water so it is safe to use	Take wastewater away (e.g. sewage)	Treat and recycle wastewater	Producing and sending bills to customers	Reading water meters to produce accurate bills
Deliver water to household and business taps	Fixing leaks on Thames Water pipes	Return water to rivers	Cleaning up sewage floods and blockages	Making it easy for customers to contact Thames Water	Dealing with requests, queries and complaints
Helping customers to use less water	Making sure there is enough water in future	Preventing pollution from sewers and sewage works	Producing and using renewable energy	Providing customers with helpful information	Supporting customers that need extra help
Water		Wastewater and rivers		Customer Service	

Raising the bar - Water

Potential options for doing more to improve further

Goal by 2050	Raising the bar activity*	What's involved and what are the benefits?
Guarantee high quality drinking water	Improving water treatment	Covering parts of water treatment works in London to reduce the chance of dangerous bacteria entering the water supply and making customers unwell
Reduce the health risk of lead in drinking water	Replacing lead pipes	Replacing lead water pipes within Thames Water's pipe network, in homes and in schools, to stop lead entering the water supply
Provide a more reliable supply of water	Replacing trunk mains	Replacing very large water pipes to reduce the risk of basements being flooded when these pipes burst
	Improving water supply reliability	Improving the water network to protect customers from unacceptable interruption to their water supply of longer than 2 days once in a lifetime

*These activities are just some of the ways Thames Water will achieve its 2050 goals in each area.

Deep dive on water

(combined customers only)

Improving water treatment

What does this involve?

- Thames Water's large London water treatment works are open to the elements and there is a risk of dangerous bacteria passing through into drinking water.

Where is Thames Water now?

- The treatment tanks at all of Thames Water's large London water works are open to the elements, but the quality of drinking water remains very high.

How does Thames Water compare to other water companies?

- Thames Water's water quality levels are close to the average compared with other water companies in the country.
- Thames Water will need to treat poorer quality water in future as the risk of dangerous bacteria is increasing due to climate change and the requirement for water companies to take less water from sensitive rivers and streams.

How could Thames Water do more and go further by 2030?

- Cover up parts of its large London water treatment works to reduce the risk of dangerous bacteria for up to 3.1 million of its 11 million water customers.

Replacing lead pipes

What does this involve?

- There are a small number of instances when drinking water contains tiny amounts of lead, picked up from lead pipes.
- Lead can be harmful to health, particularly for young or unborn children.

Where is Thames Water now?

- There are over a million lead pipes in Thames Water's network, and around the same amount within customer properties.
- Thames Water currently replaces around 10,000 lead pipes each year.

How does Thames Water compare to other water companies?

- Thames Water have more lead pipes than any other water company because it covers more people and properties than others.
- London and other towns in the region are more likely to have older water networks containing lead pipes, which were commonly installed up until the 1970s.

How could Thames Water do more and go further by 2030?

- Replace up to another 70,000 lead pipes – 6% of the total.
- Help schools to replace lead pipes and help customers replace lead pipes on their properties.

Replacing trunk mains

What does this involve?

- Trunk mains (very large water pipes) in London are often under main roads and near to private homes. If these pipes burst, they can flood properties with basements very quickly.
- Replacing these trunk mains will protect the properties at highest risk of flooding.

Where is Thames Water now?

- There are 60,000 high risk properties with basements that could flood from trunk main bursts.

How does Thames Water compare to other water companies?

- This is a fairly unique problem to Thames Water (and London in particular) as the trunk mains are very old and there are a lot of properties with basements that flood easily compared to other cities (such as Birmingham or Manchester).

How could Thames Water do more and go further by 2030?

- Replace trunk mains to protect up to 5,000 basement properties at highest risk of flooding – out of a total of 60,000 basement properties.

Improving water supply reliability

What does this involve?

- The water network can sometimes experience breakdowns or damage which can cause customers to have periods of low water pressure or no water at all.
- Most problems are fixed within a few hours, but very rarely customers can be without water for longer than 2 days. In previous research, customers have told Thames Water that interruptions of longer than 2 days once in a lifetime are unacceptable.

Where is Thames Water now?

- Thames Water is completing a detailed assessment of all properties in its supply area and has so far identified 1.9 million of 4 million properties that are at risk of being without water for longer than 2 days.

How does Thames Water compare to other water companies?

- Thames Water has more properties than other water companies at risk of unacceptable interruptions to water supply due to the age and layout of its water network.

How could Thames Water do more and go further by 2030?

- Build more pipes around weak points on the network and at treatment works so that water can still be moved around and supplied to customers.
- Improve how water supplies are connected together, including sharing water supplies with other companies across the south-east.
- This would protect up to 2.3 million properties from an unacceptable interruption of longer than 2 days once in a lifetime.

Focusing on wastewater & rivers

We are going to focus on wastewater & rivers only for now

Extract water from rivers and aquifers	Clean water so it is safe to use	Take wastewater away (e.g. sewage)	Treat and recycle wastewater	Producing and sending bills to customers	Reading water meters to produce accurate bills
Deliver water to household and business taps	Fixing leaks on Thames Water pipes	Return water to rivers	Cleaning up sewage floods and blockages	Making it easy for customers to contact Thames Water	Dealing with requests, queries and complaints
Helping customers to use less water	Making sure there is enough water in future	Preventing pollution from sewers and sewage works	Producing and using renewable energy	Providing customers with helpful information	Supporting customers that need extra help
Water		Wastewater and rivers		Customer Service	

Raising the bar - Wastewater & rivers

Potential options for doing more to improve further

Goal by 2050	Raising the bar activity*	What's involved and what are the benefits?
Stop all sewage flooding into homes, gardens and businesses	Reducing sewage flooding from very heavy storms	Improving the sewer network to reduce the chance of customers' properties being flooded by heavy storms that on average happen once in 50 years.
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	Reducing sewage spills into rivers**	Improving the sewer network to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.
Lead the improvement of rivers in the region so they become among the healthiest in the UK	Improving river health**	Improve the sewage treatment process to reduce the amount of extra nutrients, such as phosphorus, entering rivers and causing problems for plant life and wildlife.
Help tackle climate change by becoming 'net negative' meaning Thames will remove more carbon dioxide than it emits)	Reducing carbon emissions	Reducing the amount of carbon emissions produced by Thames Water so that it is no more than the amount of carbon it removes from the atmosphere (Net Zero).

*These activities are just some of the ways Thames Water will achieve its 2050 goals in each area.
** Government has set legal requirements for these areas with long-term targets and minimum short-term targets. Thames Water could accelerate progress towards meeting the final targets.

Deep dive on wastewater & rivers

Reducing sewage flooding from very heavy storms

What is this about?

- Sewer flooding in homes, gardens and businesses can happen either when sewers become blocked, or after heavy rainfall when the sewer system becomes full due to too much rainwater.

Where is Thames Water now?

- About 1,100 customers per year experience sewer flooding on their properties.
- 350,000 properties out of 6 million are at risk of flooding from a very heavy storm that on average happens once in 50 years.

How does Thames Water compare to other water companies?

- The number of properties flooding from blocked sewers in the Thames Water region is about average for the industry (2.3 sewer floods for every 10,000 properties compared to the best company having 1.3 and the worst having 4.5 for every 10,000 properties).
- However, in years when it rains heavily or is wet for a long period of time, Thames Water performs poorly compared to other companies.

How could Thames Water do more and go further by 2030?

- Build ‘nature-based solutions’ to slow down and stop rainwater from getting into sewers and causing sewers to fill up and flood
- Fix leaky sewers that allow ground water to get in during very wet periods of weather
- Reduce the number of customer ‘misconnections’ into sewers, e.g. rainwater from roofs
- This will reduce the chance of up to 18,000 properties being flooded by heavy storms that on average happen once in 50 years

Reducing sewage spills into rivers

What does this involve?

- When it rains heavily, the sewer network can become overloaded causing diluted sewage to sometimes spill over and pollute rivers and streams
- The Government has set legal requirements to reduce sewage spills, with a long-term target and minimum performance levels set every five years. Thames Water can set more ambitious targets to make quicker progress towards achieving the long-term target.

Where is Thames Water now?

- In 2020 there were around 18,400 spills into rivers in the Thames Water region – lasting for around 216,000 hours. This is about 40 spills per storm overflow each year on average.

How does Thames Water compare to other water companies?

- Thames Water has one of the lowest total number of spills each year compared with other companies, but one of the highest spill rates per storm overflow.

How could Thames Water do more and go further by 2030?

- Reduce the number of customer 'misconnections' into sewers, e.g. rainwater from roofs
- Increasing the size of our sewerage system to hold and treat more sewage
- This will reduce the duration of sewage spills into rivers each year by up to 50%

Improving river health

What is this about?

- At the end of the sewage treatment process, the treated water is returned safely to nearby rivers and streams.
- If this water contains high levels of nutrients, such as the mineral phosphorus, this can lead to extra growth of river weeds and algae and cause problems for plant life and wildlife in rivers
- The Government has set legal requirements to reduce the amount of phosphorus entering rivers by 2035 with a minimum performance level set for 2030. Thames Water can set more ambitious targets to make quicker progress towards achieving the 2035 target.

Where is Thames Water now

- By 2025 Thames Water will be removing around 75% of phosphorus entering rivers from our sewage treatment works

How does Thames Water compare to other water companies?

- It is difficult to compare Thames Water's performance on phosphorus removal with other companies, as all companies are set different targets depending on the rivers in their areas

How could Thames Water do more and go further by 2030?

- Improve the sewage treatment process further still to remove up to 90% of the phosphorus from the treated water entering rivers

Reducing carbon emissions

What does this involve?

- Thames Water is removing fossil fuels from its main operational processes to reduce carbon emissions, this will help reduce the impacts of climate change.

Where is Thames Water now?

- Thames Water has removed over half of its operational carbon emissions, mainly by generating green energy from sewage treatment which provides a quarter of Thames Water's electricity needs.

How does Thames Water compare to other water companies?

- Thames Water's current operational carbon emissions is about average for the water industry
- All water companies in the country are signed up to the ambition of achieving 'net zero' operational carbon emissions by 2030.

How could Thames Water do more and go further by 2030?

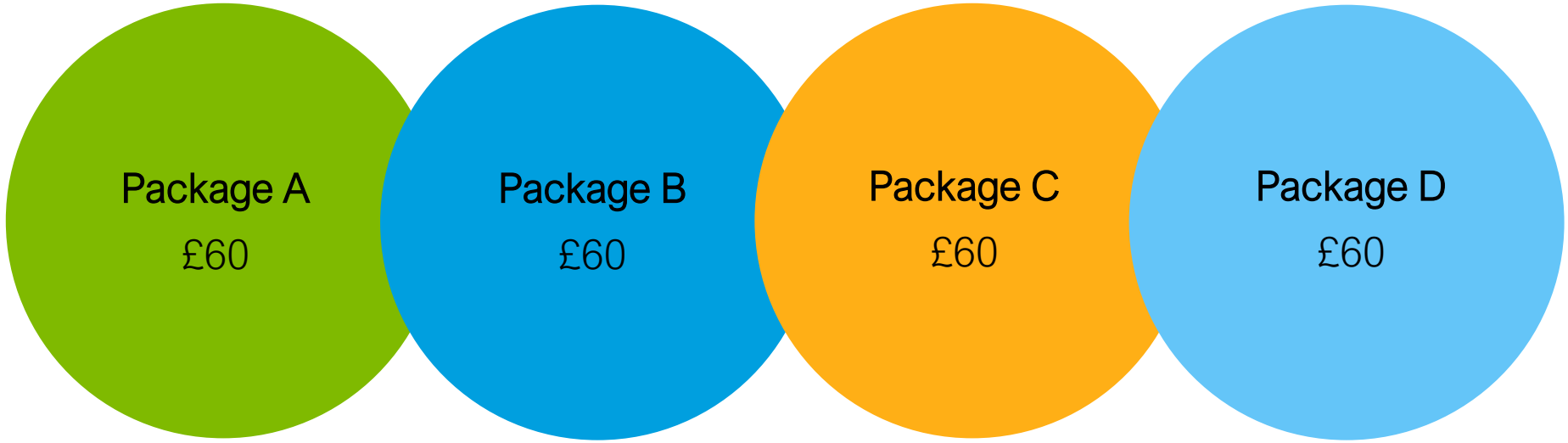
- Use multiple technologies to produce green energy and use excess heat from the sewage treatment process
- Trial new sewage treatment processes to reduce greenhouse gas emissions
- Use a 100% electric vehicle fleet by 2030 for all vans and trucks
- This will help Thames Water achieve 'net zero' operational carbon emissions by 2030

Exploring packages

(HOUSEHOLD CUSTOMERS)

Raising the bar packages

Thames Water will have a fixed amount to spend on raising the bar. Each potential package will cost roughly the same – around £60 of the average household bill by 2030 will go towards these improvements.



Package A

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **1.3 million** customers	✓✓	£1.50
Replacing lead pipes: Replace another **30,000** lead pipes – 2.5% of the total	✓✓	£1.50
Replacing trunk mains: Protect **4,000** basement properties at high risk of flooding	✓✓✓	£4
Improving water supply reliability: Protect 1 **million** properties from an interruption of 2+ days	✓✓	£8.50
Reducing sewage flooding from very heavy storms: Reduce the chance of **6,000** properties being flooded by heavy storms	✓✓	£3.50
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **50%**	✓✓✓✓	£14.50
Improving river health: Remove **90%** of the phosphorus from treated water entering rivers	✓✓✓✓	£19
Reducing carbon emissions: Reduce operational carbon emissions by **55%** (not Net Zero)	✓✓✓	£7.50
	Included within the average bill	£60

Package B

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **3.1 million** customers	✓ ✓ ✓ ✓	£3
Replacing lead pipes: Replace another **70,000** lead pipes – 6% of the total	✓ ✓ ✓ ✓	£3.50
Replacing trunk mains: Protect **5,000** basement properties at high risk of flooding	✓ ✓ ✓ ✓	£8.5
Improving water supply reliability: Protect **2.3 million** properties from an interruption of 2+ days	✓ ✓ ✓ ✓	£18
Reducing sewage flooding from very heavy storms: N/A	✗	£0
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **30%**	✓ ✓ ✓	£8.50
Improving river health: Remove **87%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	£18.50
Reducing carbon emissions: N/A	✗	£0
	Included within the average bill	£60

Package C

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: N/A	✗	£0
Replacing lead pipes: Replace another **3,000** lead pipes – 0.25% of the total	✓	£0.50
Replacing trunk mains: Protect **300** basement properties at high risk of flooding	✓	£0.50
Improving water supply reliability: Protect **95,000** properties from an interruption of 2+ days	✓	£0.50
Reducing sewage flooding from very heavy storms: Reduce the chance of **18,000** properties being flooded by heavy storms	✓ ✓ ✓ ✓	£8
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **50%**	✓ ✓ ✓ ✓	£14.50
Improving river health: Remove **90%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	£19
Reducing carbon emissions: Reduce operational carbon emissions to **Net Zero**	✓ ✓ ✓ ✓	£17
	Included within the average bill	£60

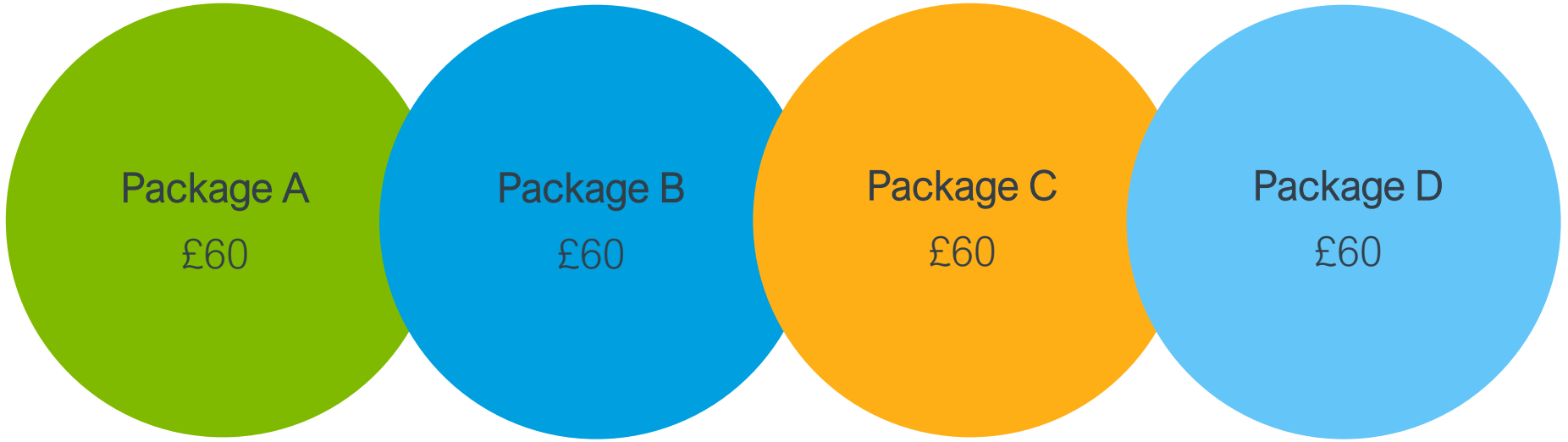
Package D

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **2 million** customers	✓ ✓ ✓	£2
Replacing lead pipes: Replace another **40,000** lead pipes – 4% of the total	✓ ✓ ✓	£2
Replacing trunk mains: Protect **4,500** basement properties at high risk of flooding	✓ ✓ ✓ ✓	£5
Improving water supply reliability: Protect **1.4 million** properties from an interruption of 2+ days	✓ ✓ ✓	£11
Reducing sewage flooding from very heavy storms: Reduce the chance of **9,000** properties being flooded by heavy storms	✓ ✓	£4.5
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **25%**	✓ ✓	£7.5
Improving river health: Remove **85%** of the phosphorus from treated water entering rivers	✓ ✓ ✓	£18
Reducing carbon emissions: Reduce operational carbon emissions by **74%** (not Net Zero)	✓ ✓ ✓	£10
	Included within the average bill	£60

Trade offs

(HOUSEHOLD CUSTOMERS)

What would your ideal package look like?



How would you spend £60 of your water bill?

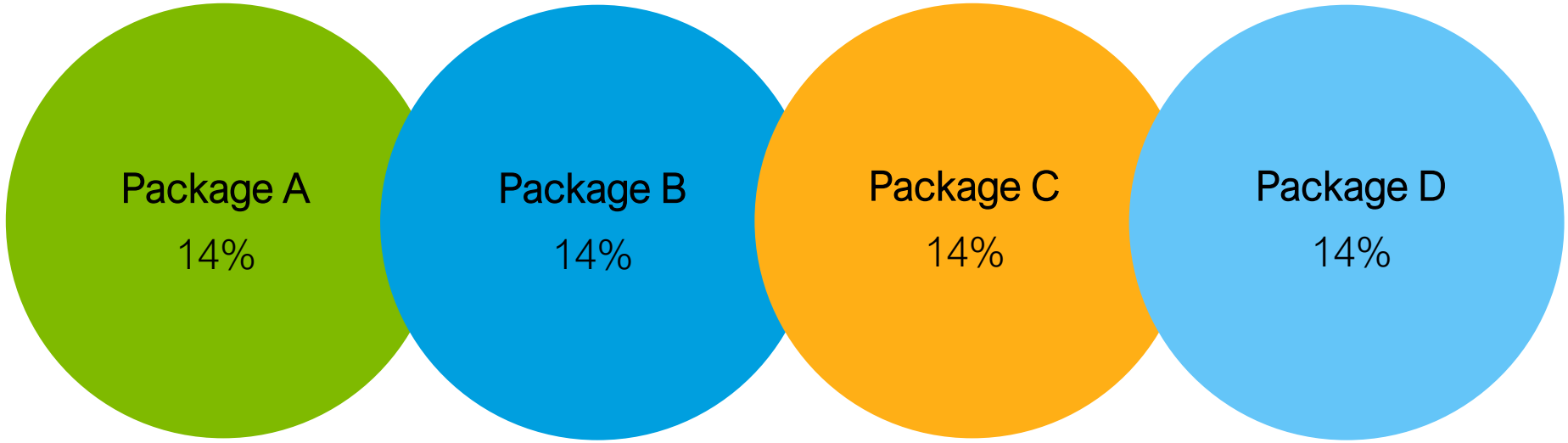
	Yes / No	What it means for customers' bills
Improving water treatment		
Replacing lead pipes		
Replacing trunk mains		
Improving water supply reliability		
Reducing sewage flooding from very heavy storms		
Reducing sewage spills into rivers		
Improving river health		
Reducing carbon emissions		
		£60

Exploring packages

(BUSINESS CUSTOMERS)

Raising the bar packages

Thames Water will have a fixed amount to spend on raising the bar. Each potential package will cost roughly the same – around 14% of business customers' bills by 2030 will go towards these improvements.



Package A

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **1.3 million** customers	✓ ✓	0.4%
Replacing lead pipes: Replace another **30,000** lead pipes – 2.5% of the total	✓ ✓	0.4%
Replacing trunk mains: Protect **4,000** basement properties at high risk of flooding	✓ ✓ ✓	0.9%
Improving water supply reliability: Protect **1 million** properties from an interruption of 2+ days	✓ ✓	2%
Reducing sewage flooding from very heavy storms: Reduce the chance of **6,000** properties being flooded by heavy storms	✓ ✓	0.8%
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **50%**	✓ ✓ ✓ ✓	3.4%
Improving river health: Remove **90%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	4.4%
Reducing carbon emissions: Reduce operational carbon emissions by **55%** (not Net Zero)	✓ ✓ ✓	1.7%
	% of bill	14%

Package B

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **3.1 million** customers	✓ ✓ ✓ ✓	0.7%
Replacing lead pipes: Replace another **70,000** lead pipes – 6% of the total	✓ ✓ ✓ ✓	0.8%
Replacing trunk mains: Protect **5,000** basement properties at high risk of flooding	✓ ✓ ✓ ✓	2%
Improving water supply reliability: Protect **2.3 million** properties from an interruption of 2+ days	✓ ✓ ✓ ✓	4.2%
Reducing sewage flooding from very heavy storms: N/A	✗	0%
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **30%**	✓ ✓ ✓	2%
Improving river health: Remove **87%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	4.3%
Reducing carbon emissions: N/A	✗	0%
	% of bill	14%

Package C

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: N/A	✗	£0
Replacing lead pipes: Replace another **3,000** lead pipes – 0.25% of the total	✓	0.1%
Replacing trunk mains: Protect **300** basement properties at high risk of flooding	✓	0.1%
Improving water supply reliability: Protect **95,000** properties from an interruption of 2+ days	✓	0.1%
Reducing sewage flooding from very heavy storms: Reduce the chance of **18,000** properties being flooded by heavy storms	✓ ✓ ✓ ✓	1.9%
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **50%**	✓ ✓ ✓ ✓	3.4%
Improving river health: Remove **90%** of the phosphorus from treated water entering rivers	✓ ✓ ✓ ✓	4.4%
Reducing carbon emissions: Reduce operational carbon emissions to **Net Zero**	✓ ✓ ✓ ✓	4%
	% of bill	14%

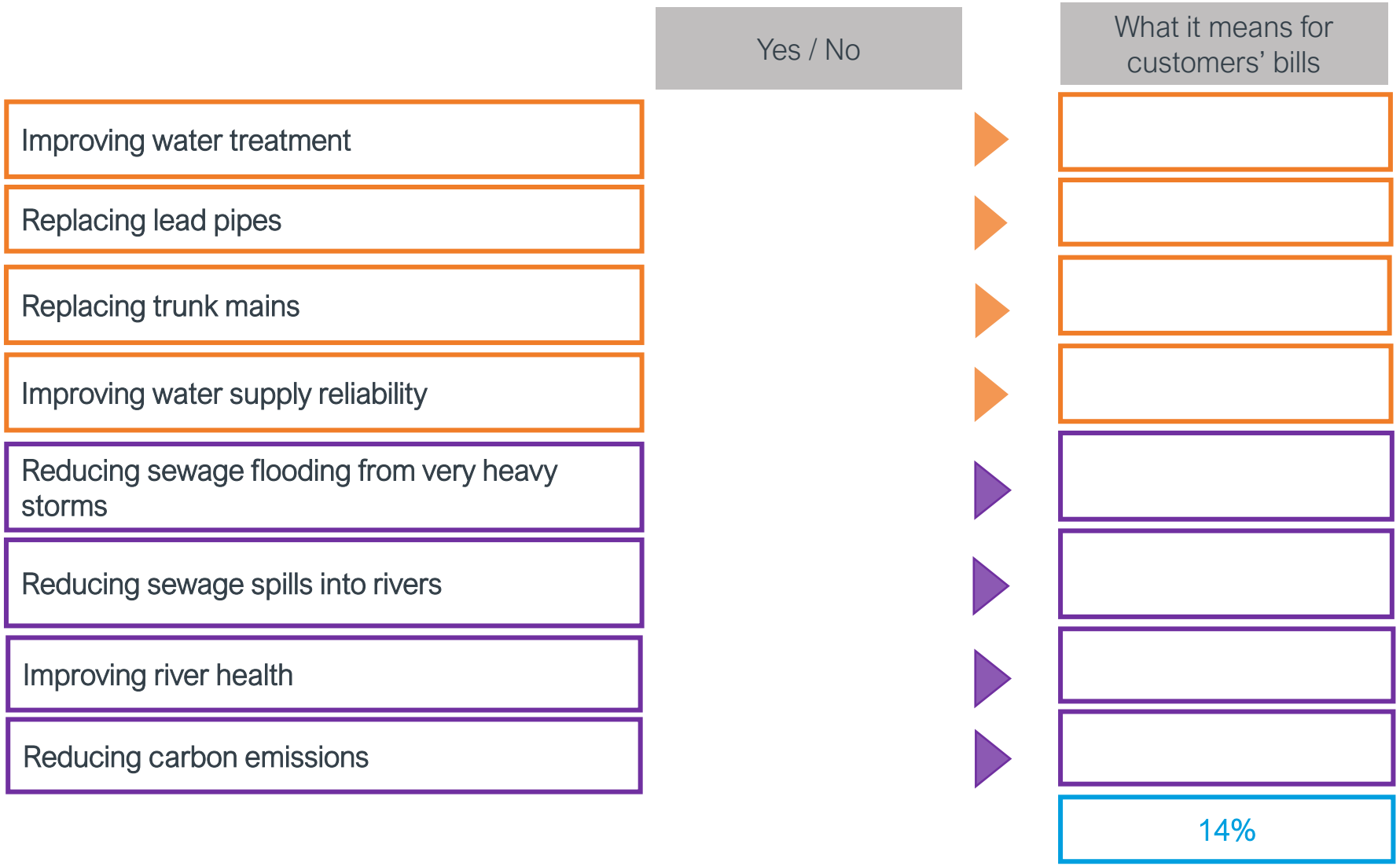
Package D

By 2030	Level of improvement	What it means for customers' bills
Improving water treatment: Reduce the risk of dangerous bacteria for **2 million** customers	✓ ✓ ✓	0.5%
Replacing lead pipes: Replace another **40,000** lead pipes – 4% of the total	✓ ✓ ✓	0.5%
Replacing trunk mains: Protect **4,500** basement properties at high risk of flooding	✓ ✓ ✓ ✓	1.2%
Improving water supply reliability: Protect **1.4 million** properties from an interruption of 2+ days	✓ ✓ ✓	2.6%
Reducing sewage flooding from very heavy storms: Reduce the chance of **9,000** properties being flooded by heavy storms	✓ ✓	1.1%
Reducing sewage spills into rivers: Reduce the duration of sewage spills into rivers each year by **25%**	✓ ✓	1.7%
Improving river health: Remove **85%** of the phosphorus from treated water entering rivers	✓ ✓ ✓	4.2%
Reducing carbon emissions: Reduce operational carbon emissions by **74%** (not Net Zero)	✓ ✓ ✓	2.3%
	% of bill	14%

Trade offs

(BUSINESS CUSTOMERS)

How would you spend 14% of your water bill?



Quantitative questionnaire

Thames Water | PR24 Options

Quantitative Survey | Draft v3

15 minute online survey

Sample: 1,500: 1000 HH customers, 500 NHH

Quotas

Household		Quota	N
Age	16 – 24	15%	150
	25 – 34	21%	210
	35 – 44	19%	190
	45 – 54	17%	170
	55 – 64	12%	120
	65+	16%	160
Gender	Male	49%	490
	Female	51%	510
SEG	ABC1	62%	620
	C2DE	38%	380
Ethnicity	White	74%	740
	Other ethnicity	26%	260
Disability	Yes	14%	140
	No	86%	860
Service provided	Combined	64%	640
	Wastewater only	36%	360

Non-Household		Quota	N
Location	London	39%	195
	Not London but inside M25	27%	135
	Outside M25	33%	165

Industry type	Construction, manufacturing, agriculture	16%	80
	Wholesale, retail, transportation	14%	70
	Accommodation, food services	7%	35
	Services	48%	240
	Public organisations	9%	45
	Other services	7%	35
Company size	0-9 employees	90%	450
	10-249 employees	9%	45
	250+ employees	1%	5
Water meter	Yes	Aim for as many as possible to be meter only	
	No		

Section 1: Profiling

AGE: [ASK ALL HH] [SINGLE CODE]

How old are you? ***Please select one option***

<1> 18-24
<2> 25-34
<3> 35-44
<4> 45-54
<5> 55-64
<6> 65+

GENDER: [ASK ALL HH] [SINGLE CODE]

In which of the following ways do you identify? ***Please select one option***

<1> Male
<2> Female
<3> Other [OPEN TEXT]
<99> Prefer not to say

POSTCODE: [ASK ALL HH] [OPEN BOX] Scripting to code into Combined/Waste water only depending on postcode

To know which type of water customer you are, please can you select your postcode from the list below?

Programmer note: Include option for 'My postcode doesn't appear in the list' and if selected, please thank and close.

SEG: [ASK ALL HH] *Use standard SEG question

URBAN: [ASK ALL HH] [SINGLE CODE]

How would you describe the area you live in? ***Please select one option***

<1> Urban
<2> Rural
<3> Suburban

TENURE: [ASK ALL HH] [SINGLE CODE]

Which of the following best describes your current living situation? ***Please select one option***

<1> Own my own property (with a mortgage)
<2> Own my own property (outright without a mortgage)
<3> Have shared ownership of my own property
<4> Renting from the council or housing association
<5> Renting from a private landlord / agency
<6> Renting university accommodation
<7> Living with parents / at home
<97> Other

ETHNICITY: [ASK ALL HH] [SINGLE CODE]

How would you describe your ethnic origin? ***Please select one option***

White

<1> English / Welsh / Scottish / Northern Irish / British
<2> Irish
<3> Any other White background

Mixed

<4> White and Black Caribbean

<5> White and Black African

<6> White and Asian

<7> Any other Mixed / Multiple ethnic background

Asian

<8> Indian

<9> Pakistani

<10> Bangladeshi

<11> Chinese

<12> Any other Asian background

Black / African / Caribbean

<13> African

<14> Caribbean

<15> Any other Black / African / Caribbean background

<16> Arab

<17> Gypsy or Irish Traveller

<18> Any other ethnic group

<99> Prefer not to say

DISABILITY: [ASK ALL HH] [SINGLE CODE]

The Equality Act 2010, and equivalent legislation in Northern Ireland, defines a person as disabled if they have a physical or mental impairment, which has a substantial and long-term (i.e. has lasted or is expected to last at least 12 months) adverse effect on the person's ability to carry out normal day-to-day activities.

Do you have a disability?

<1> Yes

<2> No

<99> Prefer not to say

DISABILITY2: [ASK ALL WITH DISABILITY DISABILITY=1] [MULTICODE]

Please tell us if any of the below apply to you

<1> Blind or sight loss

<2> Deaf or hearing loss

<3> Mobility

<4> Manual dexterity

<5> Learning disability

<6> Mental health concern

<7> Speech impairment

<8> Cognitive disability

<9> Use of at-home medical equipment (e.g. dialysis machine)

<97> Other impairment - e.g. epilepsy, cardiovascular conditions, asthma, cancer, facial disfigurement, sickle cell anaemia, or progressive conditions such as motor neurone disease.

<99> Prefer not to say

BILLPAYER: [ASK ALL HH] [CAROUSEL, RANDOMISE]

When it comes to paying each of these types of bills for your home, which of the following best describes you? *Please select one option for each question*

Questions:

<a> Water

<b> Gas/Electricity

<c> Broadband/Landlines

Options:

<1> I am the sole bill payer

<2> I am a joint bill payer

<3> I don't pay this bill directly, but I contribute towards it (e.g., as part of the rent)

<4> I am not responsible for paying this bill

<99> Not applicable to my household

METER: [ASK ALL HH] [SINGLE CODE]

Do you have a water meter? *Please select one option*

<1> Yes

<2> No

<98> Don't Know/Not Sure [FIX]

P1: [ASK ALL HH] [CAROUSEL, RANDOMISE]

Thinking about your personal life, to what extent are you feeling optimistic or pessimistic about the following? *Please select one option for each statement*

Statements:

<a> Being able to afford the essentials in life

<b> Being able to afford the luxuries in life

Options:

<1> Very optimistic

<2> Fairly optimistic

<3> Fairly pessimistic

<4> Very pessimistic

<98> Don't know/No opinion

P2: [ASK ALL HH] [CAROUSEL, RANDOMISE]

Thinking about technology, to what extent do you agree or disagree with the following?

Statements:

<a> New technology is positive and exciting

<b> I like to be one of the first to try out new gadgets and technology

<c> I regularly manage my bills online (e.g. utilities, broadband, mobile phone etc.)

Options:

<1> Strongly agree

<2> Agree

<3> Neither agree nor disagree

<4> Disagree

<5> Strongly disagree

NHH Screener Questions: [ASK NON-HOUSEHOLD CUSTOMERS ONLY]

POSTCODE_NHH: [ASK ALL] [OPEN BOX] Scripting to code into Combined/Waste water only depending on postcode

To know which type of water customer you are, please can you select your postcode from the list below?

Programmer note: Include option for 'My postcode doesn't appear in the list' and if selected, please thank and close.

NHH1: [ASK ALL] [SINGLE CODE]

Thinking about the type of business you work for: is water used in the day-to-day work that you are involved in? e.g. water is used in the product your business produces, or used as part of the service you offer.

<1> Yes

<2> No

NHH1A: [ASK ALL] [SINGLE CODE]

Which of the following best describes the importance of water to your business?

<1> It is critical to the running of the business

<2> It is critical to the running of the business but would have a negative impact if it was removed

<3> It is not critical to the running of the business and would not have a negative impact if it was removed

NHH2: [ASK ALL] [SINGLE CODE]

Is this business run from a business premises or from somewhere else, e.g. a home residence or a mobile business?

<1> Business premises

<2> No fixed business premises (e.g. van/home residence) [CLOSE]

NHH3: [ASK ALL] [SINGLE CODE]

How many sites does your organisation have?

<1> 1

<2> 2-4

<3> 5+

NHH4: [ASK ALL] [SINGLE CODE]

Including yourself, how many people work for your organisation?

<1> 1 (0 employees)

<2> 2-9

<3> 10-49

<4> 50-99

<5> 100-249

<6> 250+

<98> Don't know [CLOSE]

NHH5: [ASK ALL] [SINGLE CODE]

What type of business do you work for?

<1> Agriculture, Forestry and Fishing

<2> Mining and quarrying

<3> Manufacturing

<4> Electricity, Gas, Steam and air conditioning

<5> Water supply, sewerage, waste management and remediation activities[CLOSE]

<6> Construction

<7> Wholesale and retail trade; repair of motor vehicles and motorcycles

<8> Transport and storage

<9> Accommodation and food service activities

<10> Information and communication

<11> Financial and insurance activities

<12> Real estate activities

<13> Professional, scientific and technical activities

<14> Administrative and support service activities

<15> Public administration and defence; compulsory social security

<16> Education

<17> Human health and social work activities

<18> Arts, entertainment and recreation

<97> Other (Type In)

NNH6: [ASK ALL] [SINGLE CODE]

Is your organisation responsible for making decisions about and paying for water utilities, or is someone other than the organisation, such as the landlord or management company is responsible for this?

<1> We are responsible for this

<2> Decisions about utilities are made by a third party e.g. landlord [CLOSE]

<98> Don't know [CLOSE]

METER_NHH: [ASK ALL] [SINGLE CODE]

Do you have a water meter? *Please select one option*

<1> Yes

<2> No

<98> Don't Know/Not Sure [FIX]

NNH7: [ASK ALL] [SINGLE CODE]

How much is your organisation's average water bill per year?

<1> Up to £5000

<2> £5000 - £9,999

<3> £10,000 - £14,999

<4> £15,000 or more

<98> Don't know

NHH8: [ASK ALL] [SINGLE CODE]

Which of the following best describes your role within your business?

<1> I am the owner of the business

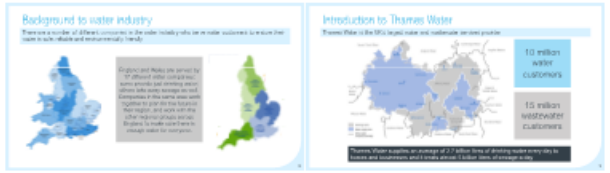
<2> I am a director / senior manager with responsibilities related to or responsible for making decisions about and paying for water utilities

<3> I am not a director / senior manager, but have some responsibilities related to for making decisions about and paying for water utilities

<4> I have a different role in the business or organisation (e.g. employee, worker, or contractor) [CLOSE]

<97> Other [CLOSE]

Section 2: Customer experiences of Thames Water



As you live / work in a Thames Water area we want to ask your views of Thames Water.

CE1: [ASK ALL] [SCALE]

Taking everything into account, how satisfied are you with Thames Water? Please use the following scale of 0-10, where 0=extremely dissatisfied, 5=neither satisfied nor dissatisfied and 10=extremely satisfied.

CE2: [ASK ALL] [SINGLE]

Before today, how much, if anything, did you know about Thames Water and the services they provide?

<1> Knew a lot

<2> Knew a little

<3> Heard of them but didn't know anything

<4> Hadn't heard of them

CE3: [ASK ALL HH] [MULTICODE, RANDOMISE]

In the last 12 months, have you had contact with Thames Water for any of the following?

<1> Anything to do with billing, your account or a general query

<2> Anything to do with your water supply [DO NOT SHOW TO WASTEWATER ONLY]

<3> Anything to do with your sewerage service

<99> None of the above [FIXED, EXCLUSIVE]

Section 3: Appeal of packages and service attributes

The purpose of this project is to gather feedback from Thames Water customers.

Thames Water wants to understand what should be prioritised in their future service. Your feedback will be used to make sure Thames Water's plans deliver the right balance of outcomes for customers. We are going to share some more information about Thames Water and prioritisation for their future service.

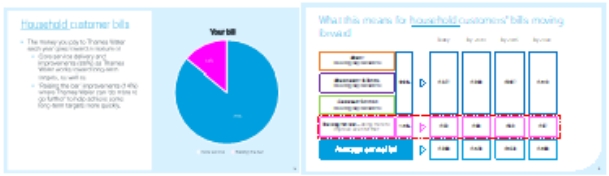
[USE STIM SLIDES]

To help with the context, below is some information on what Thames Water does and some of the challenges it faces.

Thames Water has set itself ambitious targets to make sure it improves the service it provides to customers and addresses future challenges. For Water and Wastewater & rivers these are:

The majority of your bill goes towards paying for the core service and these improvements. Some is also reserved for 'raising the bar' improvements where Thames Water can do more to go further to help achieve some long-term targets more quickly.

[HH ONLY]



[NHH ONLY]

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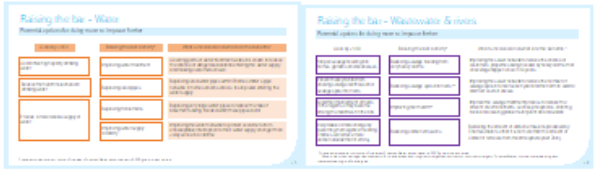

Now that you've seen some information about the challenges and plans for future service, over the next few screens we are going to explain in more detail each of the service areas where 'raising the bar' improvements could be made.

Over the next few screens we are going to show you possible ways 'raising the bar' improvements could be made to the service areas we have just shown you, and you will be asked to choose from the options presented.

To help you remember what each service area means when you are choosing options you can hover your cursor over the service area in each of the options for an explanation.

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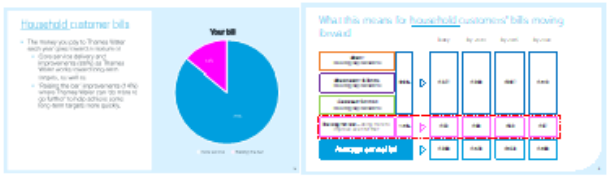

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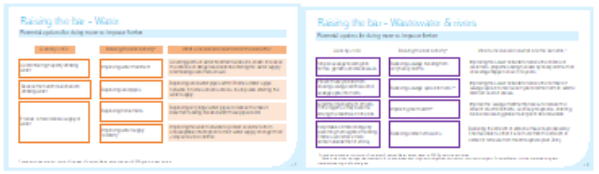

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To help you remember what each service area means when you are choosing options you can hover your cursor over the service area in each of the options for an explanation.

The options you see are just some of the ways Thames Water will achieve its 2050 goals in each area.

Conduct separate partial conjoint exercises for combined and waste only customers

Final screen:

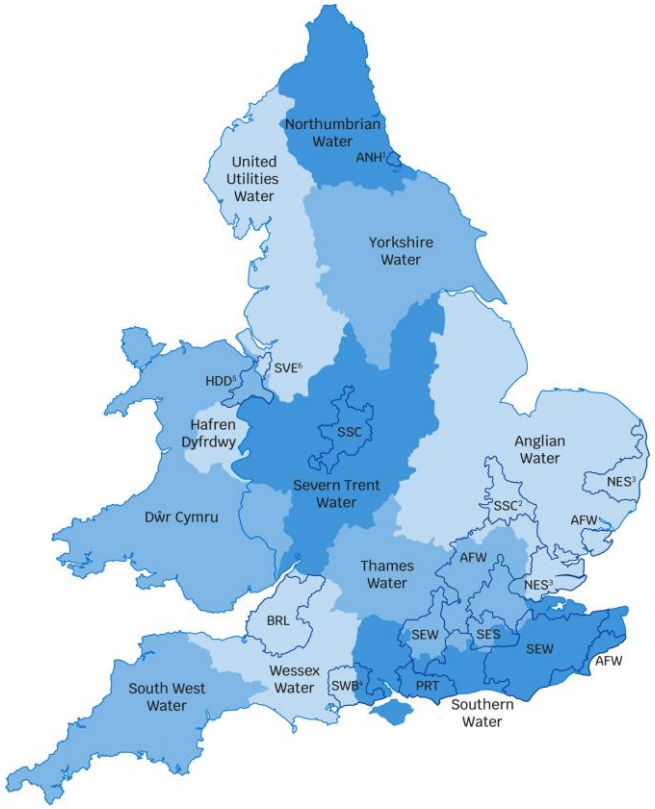
Thank you for your time. Thames Water really appreciates your views on its future service.

Quantitative stimulus

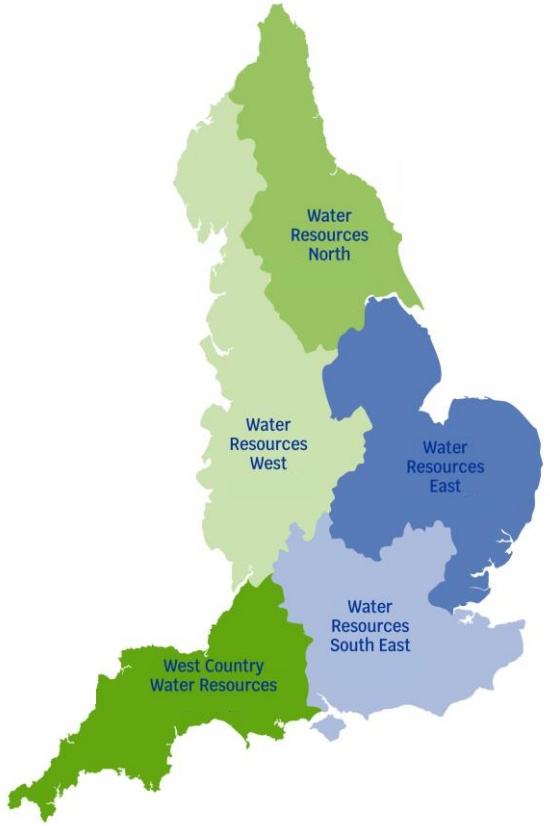
(HH and NHH combined service)

Background to water industry

There are a number of different companies in the water industry who serve water customers to ensure their water is safe, reliable and environmentally friendly

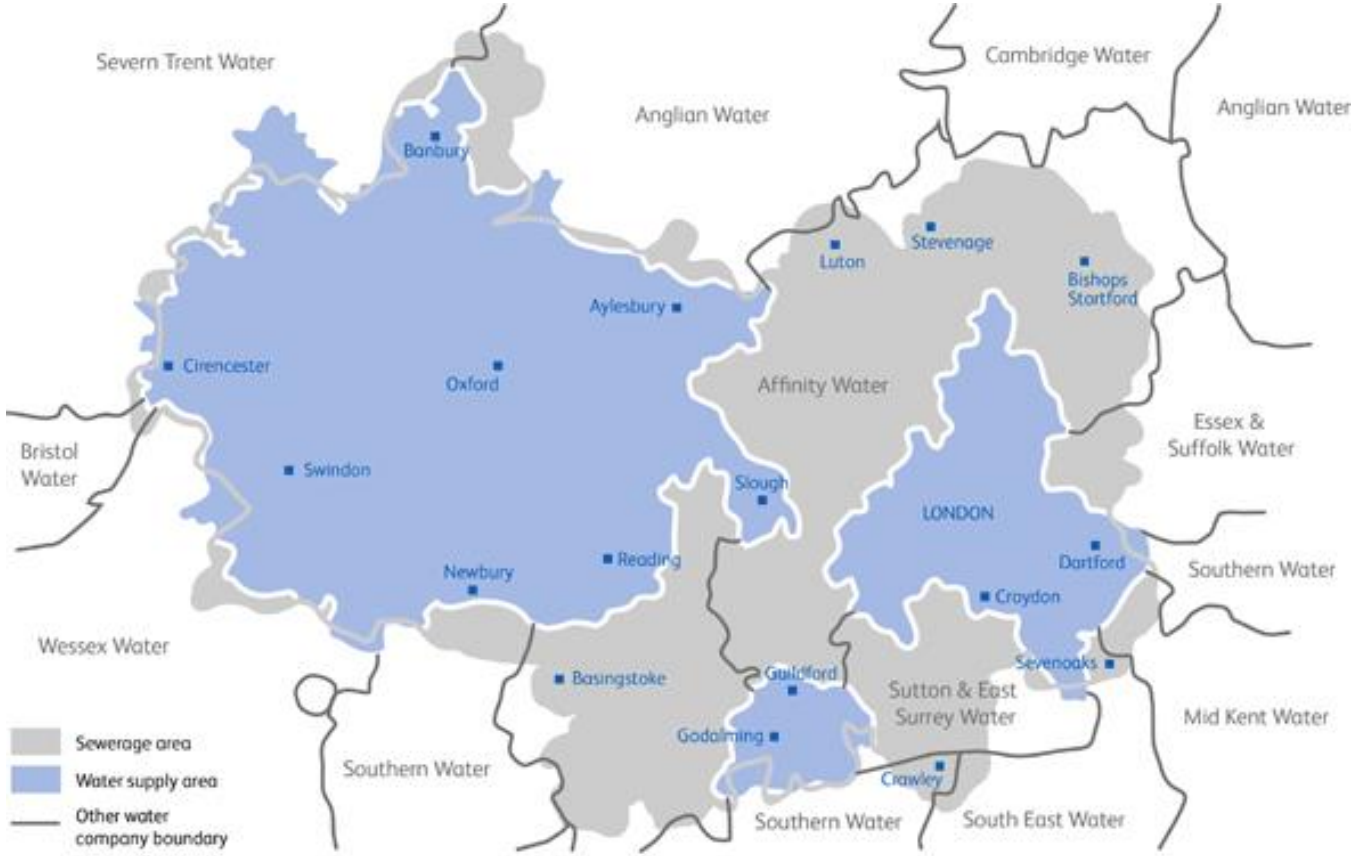


England and Wales are served by 17 different water companies: some provide just drinking water, others take away sewage as well. Companies in the same area work together to plan for the future in their region, and work with the other regional groups across England to make sure there is enough water for everyone.



Introduction to Thames Water

Thames Water is the UK's largest water and wastewater services provider



10 million water customers

15 million wastewater customers

Thames Water supplies an average of 2.7 billion litres of drinking water every day to homes and businesses and it treats almost 5 billion litres of sewage a day

What do Thames Water do?

Household only

Extract water from rivers and aquifers	Clean water so it is safe to use	Take wastewater away (i.e. sewage)	Treat and recycle wastewater	Produce and send bills to customers	Read water meters to produce accurate bills
Deliver water to household and business taps	Fix leaks on pipes	Return water to rivers	Clean up sewage floods and blockages	Make it easy for customers to contact Thames Water	Deal with requests, queries and complaints
Help customers to use less water	Make sure there is enough water in future	Prevent pollution from sewers and sewage works	Produce and use renewable energy	Provide customers with helpful information	Support customers that need extra help
Water		Wastewater and rivers		Customer Service	

Challenges for Thames Water

Thames Water are facing several challenges that must be tackled now, and in the future

• Population growth	• In the future, demand for water will increase as there are more people, more homes and more businesses to supply
• Climate change	• The effects of climate change mean that there will be less water available to meet the increasing demand from customers (e.g. hotter and drier summers could mean more water shortages and risk of drought)
• Declining river quality and biodiversity	• Widespread pollution (e.g. sewage, plastics, chemicals) is threatening freshwater habitats and biodiversity in the UK (currently no UK rivers are officially safe to swim in) • To reduce negative impacts on fish, wildlife, plants and recreation, water companies will be allowed to take less water from sensitive water sources
• Ageing infrastructure	• Old pipe networks and treatment works mean higher maintenance needs and costs • The effectiveness of the infrastructure may also decline with age and may become potential safety hazards

Planning ahead in a meaningful way can help Thames Water to solve some of these challenges and consider how their future plans might impact some of these issues (e.g. reducing leakage can help increase water supply)

Improving water service

Thames Water has set itself ambitious targets to make sure it improves the service it provides to customers.

Goal by 2050	Measurement	Today	By 2030	By 2035	By 2040
Guarantee high quality drinking water	Overall performance of drinking water when tested where 0 = no issues with quality	2.6	2.0	1.5	1.0
Provide a more reliable supply of water	% of properties each year affected by an unplanned interruption for more than 3 hours	6%	4%	2%	1%
Reduce leakage to below 10%	% of water put into supply lost through leaking pipes	23%	19%	18%	16%
Help customers to use much less water at home	Average litres of water used, per person, per day	145	137	131	128

Improving wastewater & rivers service

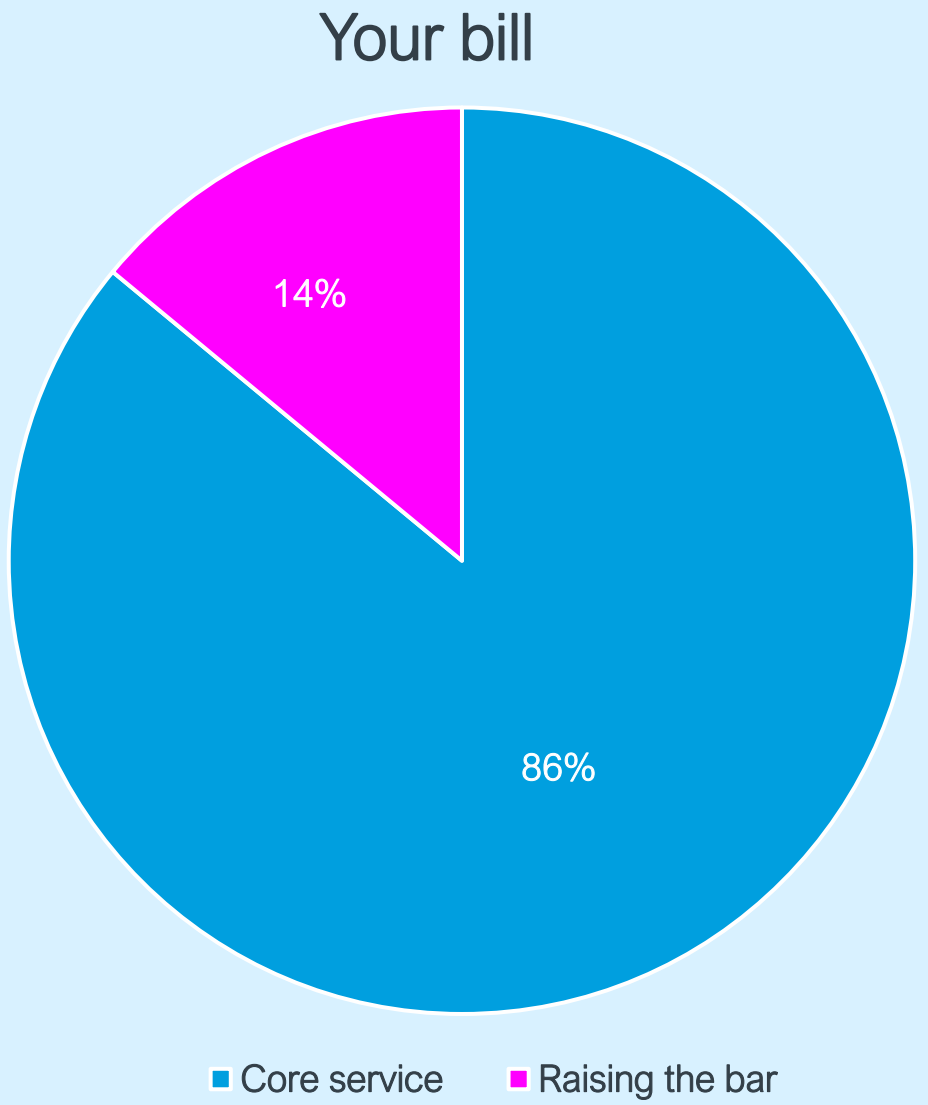
Thames Water has set itself ambitious targets to make sure it improves the service it provides to customers.

Goal by 2050	Measurement	Today	By 2030	By 2035	By 2040
Stop all sewage flooding into homes, gardens and businesses	Number of properties flooded by sewage each year	1,100	800	700	600
Reduce pollution in rivers	Number of pollution incidents each year as classified by the Environment Agency*	245	150	110	80
Lead the improvement of rivers in the region so they become among the healthiest in the UK	Percentage of sewage treatment works meeting standards set by the Environment Agency	98.9	100	100	100

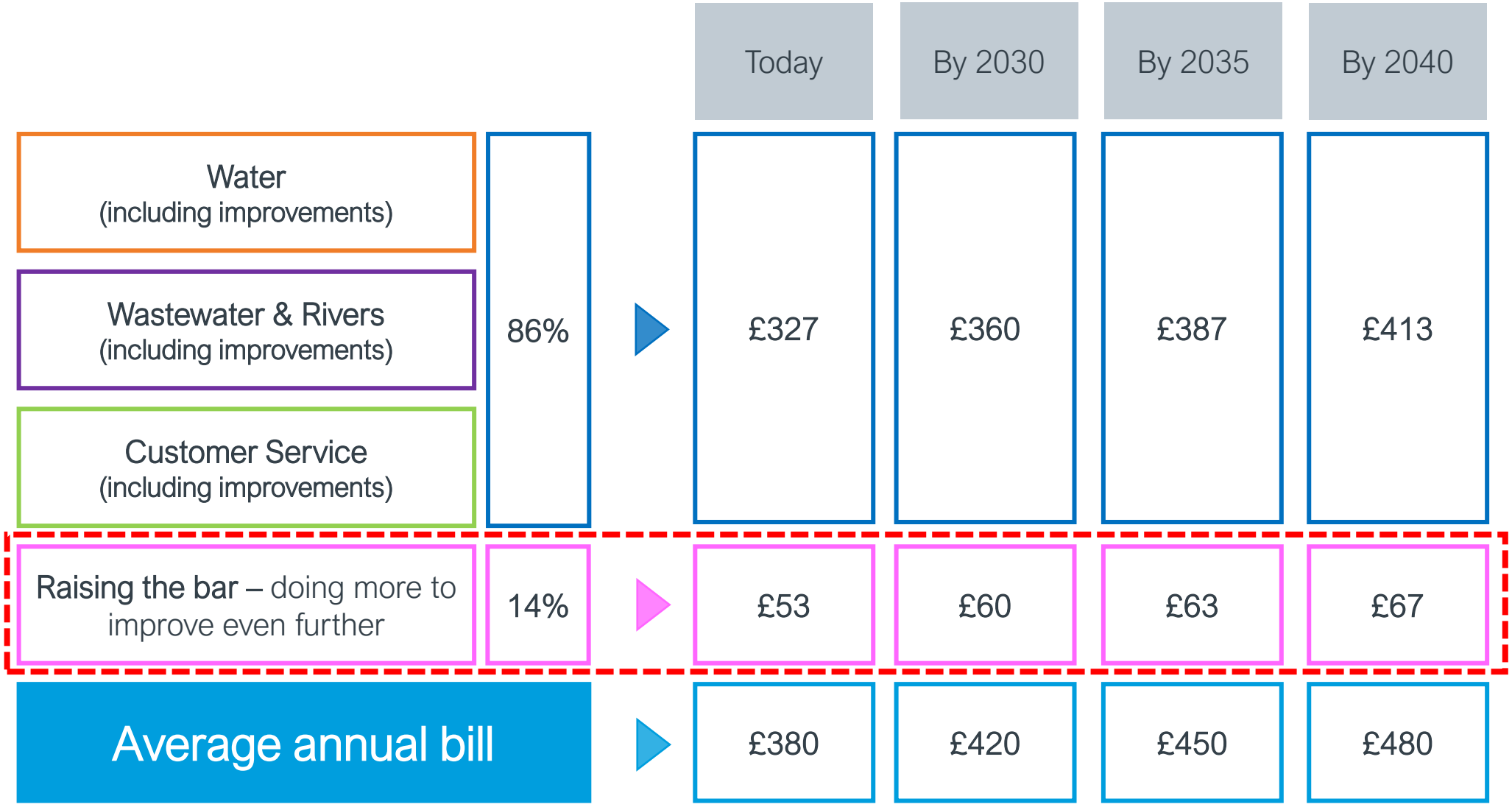
*The Environment Agency is a government department in charge of protecting and enhancing the environment in England.

Household customer bills

- The money you pay to Thames Water each year goes toward a mixture of
  - Core service delivery and improvements (86%) as Thames Water works toward long-term targets, as well as
  - ‘Raising the bar’ improvements (14%) where Thames Water can ‘do more to go further’ to help achieve some long-term targets more quickly.

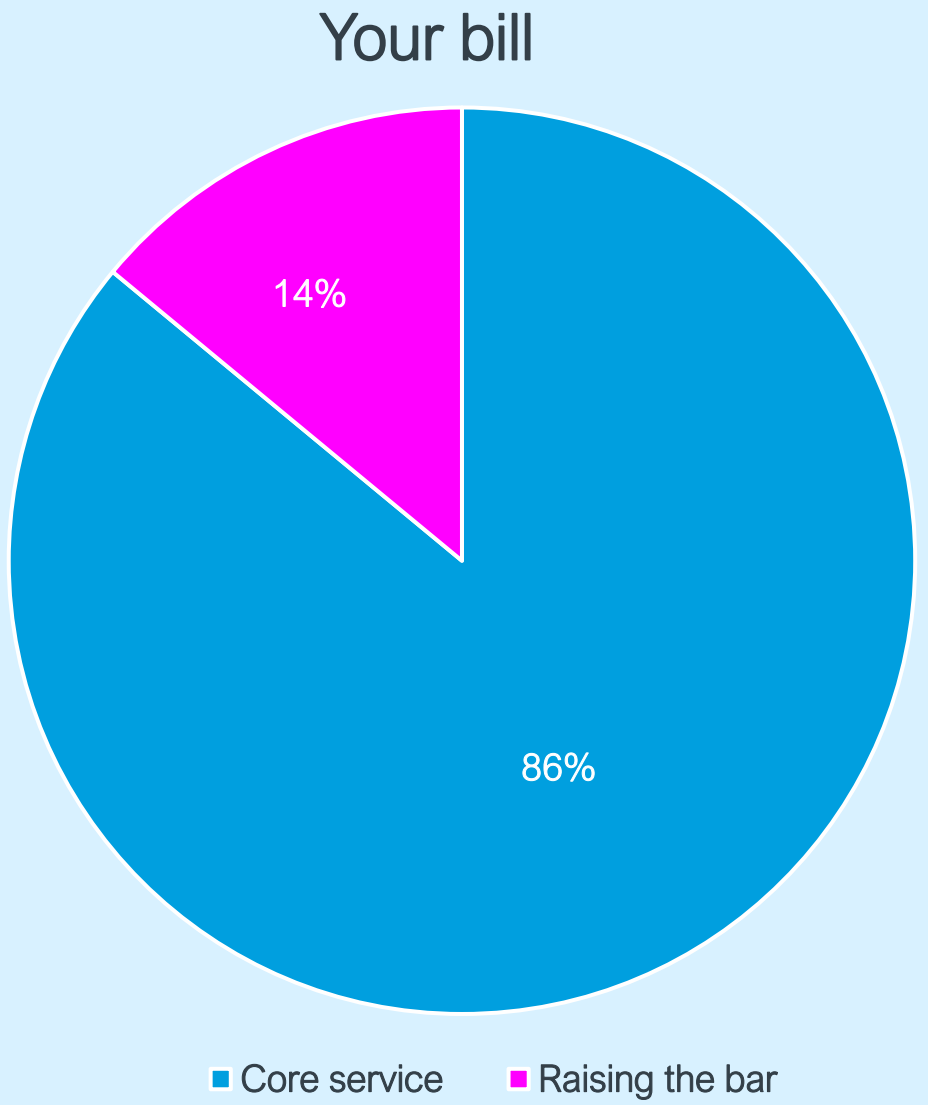


What this means for household customers' bills moving forward

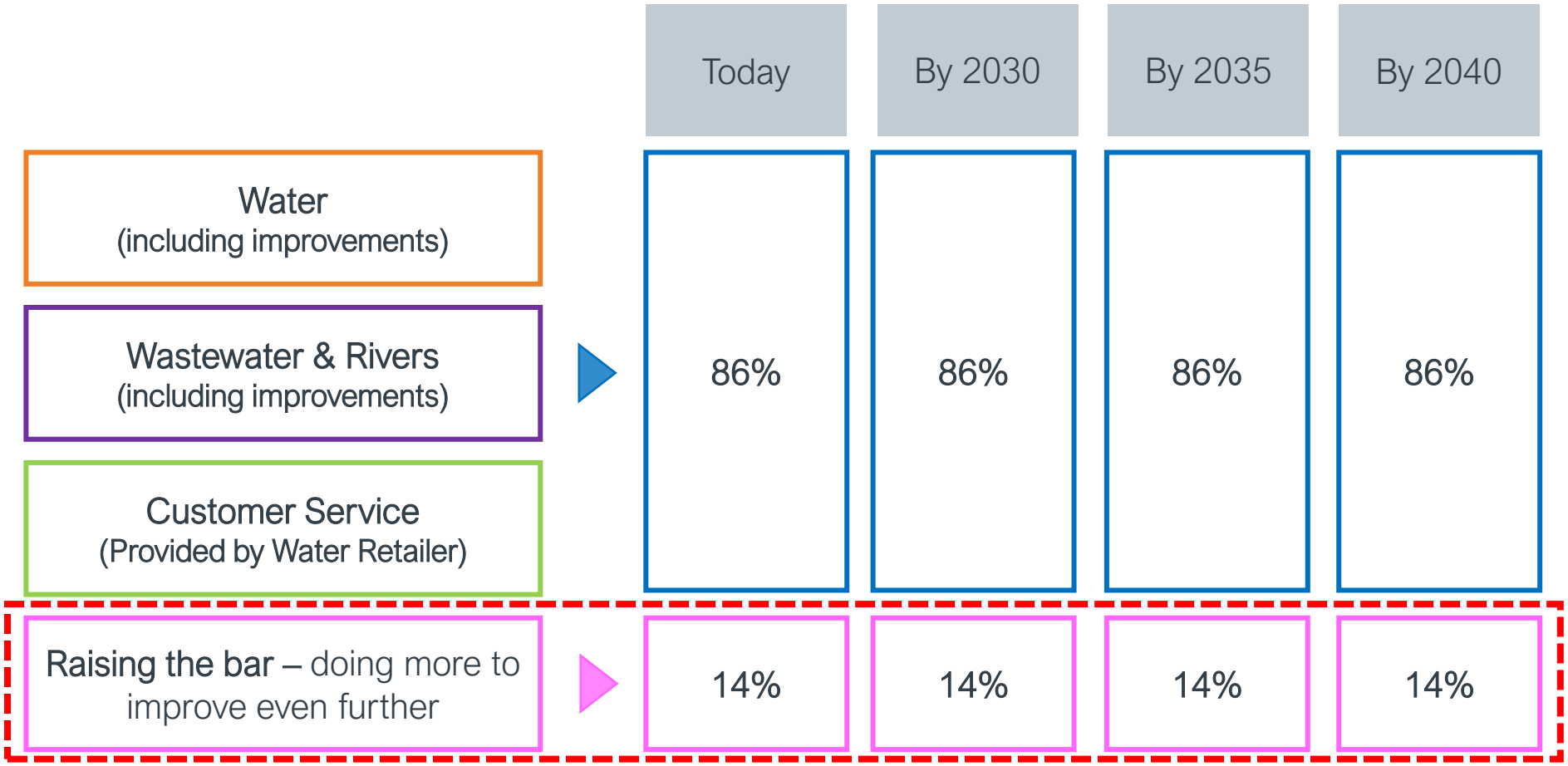


Business customer bills

- The money you pay to Thames Water each year goes toward a mixture of
  - Core service delivery and improvements (86%) as Thames Water works toward long-term targets, as well as
  - ‘Raising the bar’ improvements (14%) where Thames Water can ‘do more to go further’ to help achieve some long-term targets more quickly.



What this means for business customers' bills



Raising the bar - Water

Potential options for doing more to improve further

Goal by 2050	Raising the bar activity*	What's involved and what are the benefits?
Guarantee high quality drinking water	Improving water treatment	Covering parts of water treatment works in London to reduce the chance of dangerous bacteria entering the water supply and making customers unwell
Reduce the health risk of lead in drinking water	Replacing lead pipes	Replacing lead water pipes within Thames Water's pipe network, in homes and in schools, to stop lead entering the water supply
Provide a more reliable supply of water	Replacing trunk mains	Replacing very large water pipes to reduce the risk of basements being flooded when these pipes burst
	Improving water supply reliability	Improving the water network to protect customers from unacceptable interruption to their water supply of longer than 2 days once in a lifetime

*These activities are just some of the ways Thames Water will achieve its 2050 goals in each area.

Raising the bar - Wastewater & rivers

Potential options for doing more to improve further

Goal by 2050	Raising the bar activity*	What's involved and what are the benefits?
Stop all sewage flooding into homes, gardens and businesses	Reducing sewage flooding from very heavy storms	Improving the sewer network to reduce the chance of customers' properties being flooded by heavy storms that on average happen once in 50 years.
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	Reducing sewage spills into rivers**	Improving the sewer network to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.
Lead the improvement of rivers in the region so they become among the healthiest in the UK	Improving river health**	Improve the sewage treatment process to reduce the amount of extra nutrients, such as phosphorus, entering rivers and causing problems for plant life and wildlife.
Help tackle climate change by becoming 'net negative' meaning Thames will remove more carbon dioxide than it emits)	Reducing carbon emissions	Reducing the amount of carbon emissions produced by Thames Water so that it is no more than the amount of carbon it removes from the atmosphere (Net Zero).

*These activities are just some of the ways Thames Water will achieve its 2050 goals in each area.
** Government has set legal requirements for these areas with long-term targets and minimum short-term targets. Thames Water could accelerate progress towards meeting the final targets.

Improving water treatment

What does this involve?

- Thames Water's large London water treatment works are open to the elements and there is a risk of dangerous bacteria passing through into drinking water.

Where is Thames Water now?

- The treatment tanks at all of Thames Water's large London water works are open to the elements, but the quality of drinking water remains very high.

How does Thames Water compare to other water companies?

- Thames Water's water quality levels are close to the average compared with other water companies in the country.
- Thames Water will need to treat poorer quality water in future as the risk of dangerous bacteria is increasing due to climate change and the requirement for water companies to take less water from sensitive rivers and streams.

How could Thames Water do more and go further by 2030?

- Cover up parts of its large London water treatment works to reduce the risk of dangerous bacteria for up to 3.1 million of its 11 million water customers.

Replacing lead pipes

What does this involve?

- There are a small number of instances when drinking water contains tiny amounts of lead, picked up from lead pipes.
- Lead can be harmful to health, particularly for young or unborn children.

Where is Thames Water now?

- There are over a million lead pipes in Thames Water's network, and around the same amount within customer properties.
- Thames Water currently replaces around 10,000 lead pipes each year.

How does Thames Water compare to other water companies?

- Thames Water have more lead pipes than any other water company because it covers more people and properties than others.
- London and other towns in the region are more likely to have older water networks containing lead pipes, which were commonly installed up until the 1970s.

How could Thames Water do more and go further by 2030?

- Replace up to another 70,000 lead pipes – 6% of the total.
- Help schools to replace lead pipes and help customers replace lead pipes on their properties.

Replacing trunk mains

What does this involve?

- Trunk mains (very large water pipes) in London are often under main roads and near to private homes. If these pipes burst, they can flood properties with basements very quickly.
- Replacing these trunk mains will protect the properties at highest risk of flooding.

Where is Thames Water now?

- There are 60,000 high risk properties with basements that could flood from trunk main bursts.

How does Thames Water compare to other water companies?

- This is a fairly unique problem to Thames Water (and London in particular) as the trunk mains are very old and there are a lot of properties with basements that flood easily compared to other cities (such as Birmingham or Manchester).

How could Thames Water do more and go further by 2030?

- Replace trunk mains to protect up to 5,000 basement properties at highest risk of flooding – out of a total of 60,000 basement properties.

Improving water supply reliability

What does this involve?

- The water network can sometimes experience breakdowns or damage which can cause customers to have periods of low water pressure or no water at all.
- Most problems are fixed within a few hours, but very rarely customers can be without water for longer than 2 days. In previous research, customers have told Thames Water that interruptions of longer than 2 days once in a lifetime are unacceptable.

Where is Thames Water now?

- Thames Water is completing a detailed assessment of all properties in its supply area and has so far identified 1.9 million of 4 million properties that are at risk of being without water for longer than 2 days.

How does Thames Water compare to other water companies?

- Thames Water has more properties than other water companies at risk of unacceptable interruptions to water supply due to the age and layout of its water network.

How could Thames Water do more and go further by 2030?

- Build more pipes around weak points on the network and at treatment works so that water can still be moved around and supplied to customers.
- Improve how water supplies are connected together, including sharing water supplies with other companies across the south-east.
- This would protect up to 2.3 million properties from an unacceptable interruption of longer than 2 days once in a lifetime.

Reducing sewage flooding from very heavy storms

What is this about?

- Sewer flooding in homes, gardens and businesses can happen either when sewers become blocked, or after heavy rainfall when the sewer system becomes full due to too much rainwater.

Where is Thames Water now?

- About 1,100 customers per year experience sewer flooding on their properties.
- 350,000 properties out of 6 million are at risk of flooding from a very heavy storm that on average happens once in 50 years.

How does Thames Water compare to other water companies?

- The number of properties flooding from blocked sewers in the Thames Water region is about average for the industry (2.3 sewer floods for every 10,000 properties compared to the best company having 1.3 and the worst having 4.5 for every 10,000 properties).
- However, in years when it rains heavily or is wet for a long period of time, Thames Water performs poorly compared to other companies.

How could Thames Water do more and go further by 2030?

- Build ‘nature-based solutions’ (such as building porous green spaces in built up areas) to slow down and stop rainwater from getting into sewers and causing sewers to fill up and flood
- Fix leaky sewers that allow ground water to get in during very wet periods of weather
- Reduce the number of customer ‘misconnections’ into sewers, e.g. rainwater from roofs
- This will reduce the chance of up to 18,000 properties being flooded by heavy storms that on average happen once in 50 years

Reducing sewage spills into rivers

What does this involve?

- When it rains heavily, the sewer network can become overloaded causing diluted sewage to sometimes spill over and pollute rivers and streams
- The Government has set legal requirements to reduce sewage spills, with a long-term target and minimum performance levels set every five years. Thames Water can set more ambitious targets to make quicker progress towards achieving the long-term target.

Where is Thames Water now?

- In 2020 there were around 18,400 spills into rivers in the Thames Water region – lasting for around 216,000 hours. This is about 40 spills per storm overflow each year on average. A storm overflow is a point in the sewage system where sewage can escape when it's full.

How does Thames Water compare to other water companies?

- Thames Water has one of the lowest total number of spills each year compared with other companies, but one of the highest spill rates per storm overflow.

How could Thames Water do more and go further by 2030?

- Reduce the number of customer 'misconnections' into sewers, e.g. rainwater from roofs
- Increasing the size of our sewerage system to hold and treat more sewage
- This will reduce the duration of sewage spills into rivers each year by up to 50%

Improving river health

What is this about?

- At the end of the sewage treatment process, the treated water is returned safely to nearby rivers and streams.
- If this water contains high levels of nutrients, such as the mineral phosphorus, this can lead to extra growth of river weeds and algae and cause problems for plant life and wildlife in rivers
- The Government has set legal requirements to reduce the amount of phosphorus entering rivers by 2035 with a minimum performance level set for 2030. Thames Water can set more ambitious targets to make quicker progress towards achieving the 2035 target.

Where is Thames Water now

- By 2025 Thames Water will be removing around 75% of phosphorus entering rivers from our sewage treatment works

How does Thames Water compare to other water companies?

- It is difficult to compare Thames Water's performance on phosphorus removal with other companies, as all companies are set different targets depending on the rivers in their areas

How could Thames Water do more and go further by 2030?

- Improve the sewage treatment process further still to remove up to 90% of the phosphorus from the treated water entering rivers

Reducing carbon emissions

What does this involve?

- Thames Water is removing fossil fuels from its main operational processes to reduce carbon emissions, this will help reduce the impacts of climate change.

Where is Thames Water now?

- Thames Water has removed over half of its operational carbon emissions, mainly by generating green energy from sewage treatment which provides a quarter of Thames Water's electricity needs.

How does Thames Water compare to other water companies?

- Thames Water's current operational carbon emissions is about average for the water industry
- All water companies in the country are signed up to the ambition of achieving 'net zero' operational carbon emissions by 2030.

How could Thames Water do more and go further by 2030?

- Use multiple technologies to produce green energy and use excess heat from the sewage treatment process
- Trial new sewage treatment processes to reduce greenhouse gas emissions
- Use a 100% electric vehicle fleet by 2030 for all vans and trucks
- This will help Thames Water achieve 'net zero' operational carbon emissions by 2030