



Accent

Acceptability and Affordability Testing Quantitative Fieldwork

Final Report
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1 Executive Summary

1.1 Assurance Statement

This fieldwork was conducted in accordance with the requirements of the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

1.2 Methodology and Fieldwork

Fieldwork for this research was carried out between 18th August and 12th September 2023. A total of 2,210 interviews were achieved.

1,847¹ Household interviews were conducted, mainly via a “push to web” approach (i.e. invitation to complete online). 1,347 of these were in the Thames Water dual supply area (where Thames Water provides both water and wastewater services) and 500 in the “Affinity Thames” area (where Affinity Water provides water services and Thames Water wastewater services). 1,405 interviews were generated by an email approach (1,099 in the Thames Water dual supply area and 306 in the Affinity Thames area), 442 by post (248 in the Thames Water dual supply area and 194 in the Affinity Thames area).

363² Non-household interviews were conducted (256 in Thames Water dual supply area and 107 in Affinity Thames area). They were split 185 by Non-household panel (99 in Thames Water dual supply area and 86 in Affinity Thames area), 178 by email to customer databases obtained from Non-household water retailers (157 in Thames Water dual supply area and 21 in Affinity Thames area).

1.3 Summary of Results

Economic Outlook

The economic situation for households in particular was found to be tough – with 42% of households reporting having had difficulty with paying household bills. 16% of households stated that it was very or fairly difficult to manage financially, this increases to 50% when including those just getting by. 39% expect their financial situation to worsen in the next few years.

¹ Against an Ofwat/CCW mandated minimum of 500

² Against an Ofwat/CCW mandated minimum of 200 (for WASCs)

The economic situation for businesses seemed almost as pressured – with 24% of non-household participants reporting at least some difficulty paying bills and 40% finding it difficult to manage financially now (when including those just getting by). The outlook was better though, with 51% of businesses expecting the situation to improve and just 16% expecting it to worsen.

Affordability

Overall, 1 in 5 participants (20%) said it would be fairly or very easy to afford the proposed bill (16% of households and 32% of non-households). 29% of participants (30% of households and 25% of non-households) stated that the bill increase would be neither easy nor difficult to afford. 48% of participants (50% of households and 41% of non-households) said the bill increases would be either fairly or very difficult to afford.

There were no significant differences between the two supply areas in terms of these grouped answer bandings, but Thames Thames customers were significantly more likely to pick “very difficult” (14%) when compared with the Affinity Thames customers (7%) rather than fairly difficult (35% and 41% respectively). Lower income households found the bills particularly difficult to afford, with 75% of households with an income under £16,000 finding the increases very or fairly difficult to afford. The number of those saying the bill was fairly or very easy to afford was higher amongst metered users (20%) than unmetered users (13%).

In a non-mandated additional question added towards the end of the survey, the proportion of participants that found the proposed bill fairly or very difficult to afford reduced from 48% to 40% after seeing the proposed plan (with the number saying the proposed bill would be fairly or very easy to afford rising from 20% to 21%, and the number saying neither easy nor difficult rising from 29% to 36%).

The number of non-household participants that found the proposed bill fairly or very difficult to afford reduced from 41% to 31% after seeing the proposed plan (with very or fairly easy increasing from 32% to 38%, and neither easy nor difficult increasing from 25% to 31%). Households were somewhat less likely to soften, with the percentage saying the bill increase would be fairly or very easy to afford remaining constant at 16% - but the middle ground of neither easy nor difficult did increase from 30% to 38% (with a corresponding decrease in those saying the bill would be fairly or very difficult to afford, from 50% to 43%).

Acceptability

The proportion of participants that found the proposed plan acceptable or completely acceptable was 65% overall, with 20% labelling the plan unacceptable or completely unacceptable, and 15% not knowing/unable to say.

62% of household participants found the plan acceptable (either fairly or very), with 21% finding the plan unacceptable and 16% unable to say. Customers that found the plan acceptable support what Thames Water is trying to do long term (53%), feel like their plans are focusing on the right services (46%) and trust Thames to do what is best for their customers (22%). The main reasons for household participants finding the plan

unacceptable were mainly financially driven; Not trusting the company to deliver the service improvements (36%); company profits were too high (32%), the bill increase being too expensive (24%), companies should pay for service improvements (24%) being the top four responses.

The number of non-household participants that found the plan acceptable or completely acceptable was significantly higher at 75% (and correspondingly a significantly lower percentage of non-households stating that the plan was unacceptable (12%)). Significantly fewer non-households (11%) than households were unable to say. Similarly to household customers, businesses find the plan acceptable because they support what they are trying to do long term (57%), feel Thames Water plans focus on the right services (46%) and feel that things are improving (25%). Again the main reasons for non-household unacceptability were similar to those of household customers. The top 3 reasons being: Not trusting the company to make these service improvements (31%), Expecting better service improvements (30%) and company profits being too high (22%).

Top Priorities for investment

Reducing leakage was the top water related investment priority for both household participants (56%) and non-household participants (43%). Preventing issues with the quality of water was second with similar proportion of household (27%) and non-household (33%) customers choosing it. Reducing the duration of interruptions was rated third for both household (12%) and non-household (22%) participants.

Reducing the number of pollution incidents was the top wastewater related priority overall, and it was chosen by 46% of household participants. However, internal sewer flooding was the top priority for non-household participants with 54% choosing this option (compared to 38% for household). Sewage flooding gardens and outbuildings was rated third for both household (6%) and non-household (9%).

The four enhancement cases were presented in two banks of two cases each.

Of the first 2 cases (Water demand: helping customers save water and Water supply: providing new sources of water) Water demand: helping customers save water was the clear priority of both audiences – with 55% of household participants and 66% of non-household participants choosing it as being most important.

Of the second 2 cases (Reducing pollution of rivers from sewage spills, and Improving the capacity of sewage treatment works), Reducing pollution of rivers from sewage spills was the clear priority of both audiences – with 66% of household participants and 70% of non-household participants choosing it as being most important.

Intergenerational Fairness

Both household and non-household audiences would prefer increases to start sooner and be better spread across different generations of bill payers (39% and 47% of responses respectively).

A remarkably large proportion of household customers (43%) said they didn't know enough to answer – potentially indicating the difficulty of the choice in the current financial circumstances.

Just 18% of household participants, and 32% of non-household participants, chose to delay increases and pass more of them on to younger and future bill payers.

2 INTRODUCTION

2.1 Background

All water and wastewater companies are required to test the acceptability and affordability of their Business Plans with their customers before submitting their plans for the upcoming Price Review (PR24) in October 2023.

Thames Water are mandated to conduct testing of both the acceptability and affordability of the combined water and wastewater plan in their dual supply area, and the acceptability only of the wastewater plan, in any areas which make up more than 10% of their customer base (namely, and solely, the “Affinity Thames” area).

To ensure a standardised approach is used across the industry, Ofwat and CCW have produced guidance on how this research should be undertaken. This guidance has been designed to facilitate consistency and comparability between companies (e.g. question language, methodologies, approach taken to inflation, the degree to which participants are informed, clarity on least cost vs. proposed options, inclusion of vulnerabilities, different futures, single affordability scheme).

Accent was commissioned to carry out the quantitative component of Thames Water’s Acceptability and Affordability Testing (AAT) research with their customers. This report represents the findings from the research.

2.2 Objectives

The overarching objective of this research is to measure customer support for the PR24 Business Plan and LTDS

More specifically, the research aims to:

- Ensure that customers' priorities and preferences are driving Thames Water PR24 investment plan decisions where appropriate
- Provide evidence to demonstrate that customers consider the forecast bill impacts to be acceptable, including on affordability, levels of service and operational risk in the short and long term
- Demonstrate that the engagement with customers reflects the potential affordability impacts in different futures
- Measure intergenerational fairness attitudes when it comes to bill increases and investment
- Follow the prescribed Ofwat/CCW guidance

2.3 Report Structure

This document is the report on the quantitative stage of the Acceptability and Affordability testing for Thames Water. This report describes survey design and methodologies alongside customers' view on the Acceptability and Affordability of Thames Water' AMP8 business plan.

Accent conforms to the requirements of the quality management system ISO 20252:2019.

2.1 Economic/media backdrop

This research was conducted against a backdrop of difficult circumstances for the economy, and with the water industry repeatedly making headline news for negative reasons.

Since late 2021, a large proportion of the UK population have been feeling the effects of the cost-of-living crisis. This has meant that households typically have less disposable income and Thames Water customers may be feeling more financially squeezed than normal.

In May 2023, and in reaction to public anger regarding stories of water companies releasing raw sewage into the UK waterways, a number of actions were taken within the industry.

- A number of water service provider CEOs (Yorkshire Water, Thames Water and South West Water) declined to accept their usual bonuses (water company exec bonused having been subject to much media scrutiny and public discontent) due to poor performance.
- A joint apology was offered to the public for not acting quickly enough to prevent sewage spills, with a promise to increase investment to prevent spills in future to £10bn by 2030. However, some criticism was received due to this increased investment being funded by customers' bills.

At the end of June the CEO of Thames Water resigned, it was revealed that the company was in £14bn of debt and there were fears it was on the verge of collapse. On August 9th the news headlines featured 6 water companies (including Thames Water) which could be facing £800m lawsuits over allegations of underreporting pollution incidents and overcharging customers.

3 METHODOLOGY

3.1 Introduction

Generally speaking the methodology was heavily prescribed, by the “Guidance for water companies: testing customers’ views of the acceptability and affordability of PR24 business plans” document issued by Ofwat and CCW (“the guidance”).

Having said that, the guidance changed and was clarified frequently throughout the research period. In all respects (unless documented within this report) the guidance in effect at the time was consistently followed.

Thames Water’s Independent Challenge Group (known as the Customer Challenge Group – CCG) was informed and consulted throughout the research process, including inception, design, and fieldwork (particularly on parts of the research where the guidance was not specific, there was room for interpretation, or in the rare instance that it was thought best not to follow the guidance on a particular issue).

3.2 Cognitive testing

Comprehensive cognitive testing was carried out. 11 household and 5 non-household cognitive interviews were carried out using Zoom with the participants filling in the online survey and an Accent moderator observing and probing.

Findings were presented to Thames Water’s CCG, and all changes resulting from the cognitive testing process were implemented with CCG approval. Full report can be found in Appendix E.

3.3 Sampling and approach

Household sampling

The Thames Water area was treated as two locations – the first location is the area supplied both clean water and wastewater services by Thames Water (“Thames Thames”), and the second where the wastewater services are provided by Thames Water but the clean water by Affinity Water (“Affinity Thames”). These are the only supply areas that meet the criteria for selection under Ofwat/CCW’s guidance (namely that they make up over 10% of Thames Water’s customer base).

Recruitment was using Thames Water and Affinity Water customer lists with flags for Priority Services Register (PSR) and social tariff.

The target number of interviews was set to 1800³. This was split 1300 Thames Thames, 500 Affinity Thames (recognising both the dominant nature of Thames Thames in terms of customer percentage, but also the need to obtain a reliable sample size for Affinity Thames).

The guidance specified that a random sample of domestic customers was to be approached and asked to take part in the research. Where the water company has an email address for a selected property, the approach was to be made by email. Where the company does not have an email address for the property, the approach was to be made by letter. A £10 incentive (in the form of either a high street retail voucher or a donation to WaterAid) was offered to all participants to encourage participation. Primarily, the recruitment used a push-to-web approach with online survey links and QR codes provided in the letter and email invitations. Participants were also offered the opportunity to make any accessibility requests (including requesting a paper version of the questionnaire to fill in and post back – 51 such requests were received and honoured (45 in the Thames Thames area, 6 in the Affinity Thames area).

The guidance mandates that areas of differing deprivation (as defined by the Index of Multiple Deprivation (IMD)) be boosted or suppressed by certain percentages, to account for lower response rates amongst more deprived areas and their importance in the research. The process by which this component of the guidance was followed, was to effectively convert the percentage given in the guidance to a “boost factor”, to sample by IMD decile naturally (using a consistent assumed response rate) and then adjust the number of selections by the boost factor. Where the IMD decile was not known, no boost was applied. The calculations used to define the universe for the research (and from which all sub-sampling was conducted), follows:

Thames Thames:

Customer split	IMD Decile	Ofwat adjustment factor	Properties	Percentage:	ideal interview % split	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Sample to be drawn (adjusted)
14.81%	1	1.25	82319	2.33%	2.33%	30	3%	1010	1263
	2	1.25	440656	12.48%	12.48%	162	3%	5407	6759
27.87%	3	1.1	537469	15.22%	15.22%	198	3%	6595	7255
	4	1.1	446827	12.65%	12.65%	164	3%	5483	6031
20.29%	5	1	360372	10.20%	10.20%	133	3%	4422	4422
	6	1	356254	10.09%	10.09%	131	3%	4371	4371
18.54%	7	0.9	317244	8.98%	8.98%	117	3%	3893	3503
	8	0.9	337523	9.56%	9.56%	124	3%	4142	3727
18.48%	9	0.75	325695	9.22%	9.22%	120	3%	3996	2997
	10	0.75	326828	9.25%	9.25%	120	3%	4010	3008
0.01%	Unknown	1	325	0.01%	0.01%	0	3%	4	4
	TOTAL		3531512			1300		43333	43340

³ The minimum sample size listed in the guidance issued by Ofwat and CCW was 500.

Affinity Thames:

Customer split	IMD Decile	Ofwat adjustment factor	Properties	Percentage:	ideal interview % split	ideal interview n split	Assumed baseline response rate	Sample to be drawn (unadjusted)	Sample to be drawn (adjusted)
4.63%	1	1.25	4102	0.34%	0.34%	2	3%	57	71
	2	1.25	51656	4.28%	4.28%	21	3%	714	893
19.34%	3	1.1	96687	8.02%	8.02%	40	3%	1337	1470
	4	1.1	136457	11.32%	11.32%	57	3%	1887	2075
24.79%	5	1	154317	12.80%	12.80%	64	3%	2133	2133
	6	1	144481	11.98%	11.98%	60	3%	1997	1997
21.50%	7	0.9	126892	10.53%	10.53%	53	3%	1754	1579
	8	0.9	132254	10.97%	10.97%	55	3%	1828	1646
29.32%	9	0.75	155641	12.91%	12.91%	65	3%	2152	1614
	10	0.75	197825	16.41%	16.41%	82	3%	2735	2051
0.43%	Unknown	1	5223	0.43%	0.43%	2	3%	72	72
	TOTAL		1205535			500		16667	15602

This ensured that the selection (a) matched the profile of the two Thames Water supply areas, and (b) boosted each IMD decile appropriately in line with the guidance.

The percentages of records drawn for email vs postal, were checked (between the overall complete sample universe of all non-excluded customers, and the drawn sample), to ensure a selection bias had not been introduced that would later require remedial weighting. It was judged that the two data sets were sufficiently closely aligned that this was not the case.

IMD Decile	Selected		Sample Universe	
	email	post	email	post
1	56%	44%	57%	43%
2	59%	41%	59%	41%
3	62%	38%	62%	38%
4	62%	38%	64%	36%
5	63%	37%	65%	35%
6	65%	35%	65%	35%
7	64%	36%	65%	35%
8	65%	35%	64%	36%
9	64%	36%	64%	36%
10	62%	39%	63%	37%

Sample exclusions were kept to a minimum:

- Customers who have previously requested not to be included in research/surveys.
- Customers flagged as having a recent bereavement.
- Customers with no UK communication methods.
- PSR customers who require TW to communicate with a 3rd Party/Authorised representative.
- Household accounts with a non-household entity as the account holder, e.g. Managing Agents for a block of residential flats.

No quotas were set (in line with the Ofwat and CCW guidance).

Household Fieldwork

An initial sample was drawn from the universe, based on a much more optimistic response rate (4.5%), to ensure we did not invite more participants than was necessary. The proportions by IMD decile as defined above, were maintained. Records with an email address were sent a single email, records without, a letter.

Responses to these mailings follow:

Thames Thames Initial Mailing Calculator			
		IAs wanted	1300
		Assumed %	4.5%
		n=	28889
IMD Decile	Total	email	Post
1	842	475	367
2	4505	2647	1857
3	4836	2979	1856
4	4020	2483	1535
5	2947	1857	1090
6	2914	1904	1010
7	2335	1485	849
8	2485	1620	865
9	1998	1274	723
10	2005	1233	772
Unknown	3	1	2
TOTAL	28889	17958	10926
IAs after initial mailing	1347	1099	248
Conversion rate after initial mailing	4.66%	6.12%	2.27%

Affinity Thames Initial Mailing Calculator			
		IAs wanted	500
		Assumed %	4.5%
		n=	11111
IMD Decile	Sampled	email	Post
1	50	26	24
2	636	370	266
3	1047	634	413
4	1478	890	587
5	1519	933	586
6	1423	854	569
7	1124	664	460
8	1172	704	468
9	1149	687	462
10	1461	858	603
Unknown	51	32	18
TOTAL	11111	6652	4456
IAs after initial mailing	461	269	192
Conversion rate after initial mailing	4.15%	4.04%	4.31%

In the Thames Thames area, we exceeded the full target of 500 interviews and hence did not require, nor therefore send, any reminders.

The Affinity Thames area mailing did not achieve quite the same response rate and fell slightly short. It was assessed that to reach the target of 500 interviews, a small reminder would be required. Reminders were drawn in the same IMD proportions as used throughout. Due to time constraints, it was not possible to send any postal reminders so this small final reminder was sent to email households only.

The response rate of this reminder was far lower than expected, so a second set of email only participants was selected for an additional reminder. This was sufficient to complete fieldwork.

Affinity Thames Initial Reminder Calculator				Affinity Thames Second Reminder Calculator			
		IAs wanted	39			IAs wanted	24
		Assumed %	3.000%			Assumed %	1.846%
		n=	1300			n=	1300
IMD Decile	Total	email	postal	IMD Decile	Total	email	postal
1	6	6	0	1	6	6	0
2	74	74	0	2	74	74	0
3	123	123	0	3	123	123	0
4	173	173	0	4	173	173	0
5	178	178	0	5	178	178	0
6	166	166	0	6	166	166	0
7	132	132	0	7	132	132	0
8	137	137	0	8	137	137	0
9	134	134	0	9	134	134	0
10	171	171	0	10	171	171	0
Unknown	6	6	0	Unknown	6	6	0
TOTAL	1300	1300	0	TOTAL	1300	1300	0
IAs from email Reminder	15	15		IAs from email Reminder	24	22	2
Conversion rate of email reminder	1.15%	1.15%		Conversion rate of email reminder	1.85%	1.69%	
Running total Interviews	476	284	192	Running total (& final) Interviews	500	306	194
Conversion Rate Overall	4.28%	4.27%	4.31%	Conversion Rate Overall	4.50%	4.60%	4.35%

Non-household sampling and fieldwork

A target of 350 non-household interviews was set⁴, 250 in Thames Thames area, 100 in the Affinity Thames area. Non-household bill-payers were recruited from a mix of sample sources, and interviewed by a variety of means:

Commercial panel (online):

Quest Mindshare (a specialist non-household panel) was used for this component. A total of 99 interviews were obtained via this method in the Thames Thames area, and 86 interviews in the Affinity Thames area.

⁴ The minimum NHH sample size listed in the guidance for WOCs was 100.

Retailer customer databases (online):

Castle Water, Wave, and Everflow agreed to Accent using their customer lists to approach customers by email. 30,000 emails were sent to customers in the Thames Thames area, and 4122 in the Affinity Thames area, generating 157 Thames Thames interviews and 21 Affinity Thames interviews (response rates of 0.52% and 0.59% respectively)

Thus, 363 non-household interviews were conducted (256 in Thames Thames, 107 in Affinity Thames).

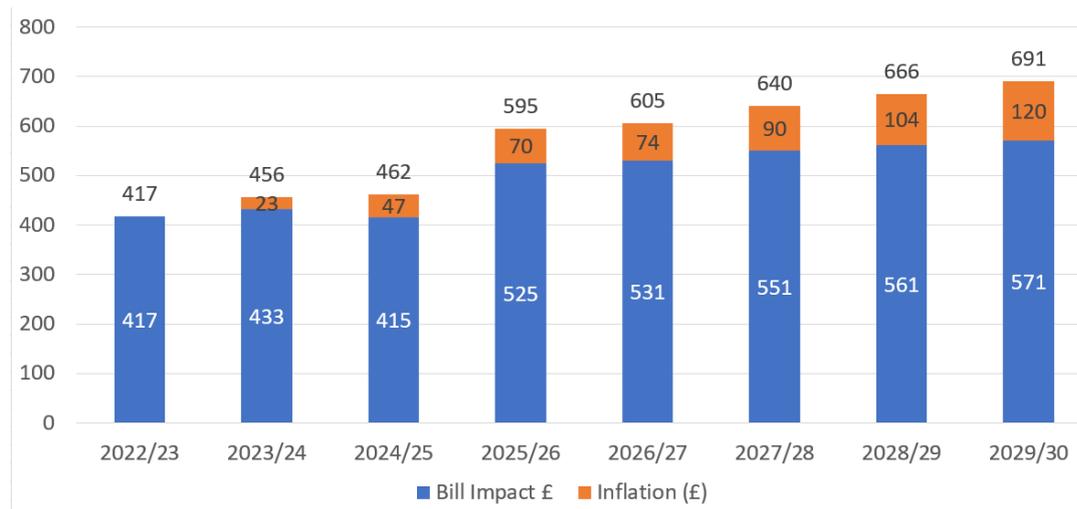
Survey

The questionnaire itself was generally tightly prescribed and was implemented as mandated.

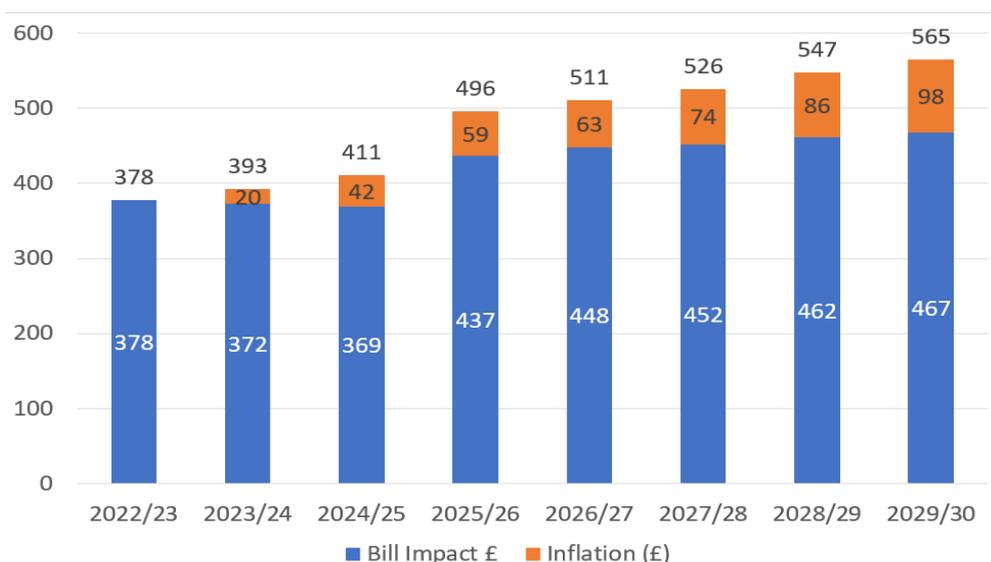
The sole exception to this, was the bill chart graph, where following cognitive feedback it was decided that it would benefit comprehension if a total (of bill impact plus inflation) were added above each bar on the graph showing the impact of the plan on bills. This was added with the approval of Thames Water's Customer Challenge Group.

Examples follow based on the average bill amount, and showing the actual increases tested (the difference being accounted for by the respective contributions of the Affinity Water bill, to the total bill):

Thames Thames



Affinity Thames



Some additional questions were asked after the main body of the survey. Firstly, in the Affinity Thames area participants were shown a bill graph based on their wastewater only bill amount (to give Thames Water some affordability feedback from the Affinity Thames area, that is related only to the Thames Water component of the bill). Secondly, all customers were asked for their “prompted” affordability (that is, the affordability of the proposed bill, having seen the various components of the plan), to enable some consideration to be given to whether unprompted affordability tells the full story. The addition of these questions is in line with clarifications issued by Ofwat that supplement the guidance. The results of these questions were not used in the SUP14 data table submission.

3.4 Fieldwork dates

Household and non-household interviews took place simultaneously. Fieldwork commenced on the 18th August 2023 and closed on the 12th September 2023.

3.5 Data processing

Once fieldwork was completed, the resulting dataset was cleaned to remove poor quality responses, including suspiciously low interview durations (speeders), those clearly choosing the first answer code in all questions even when that meant contradictor responses (straight liners), multiple responses from the same IP address etc.

As mandated by Ofwat, data was checked to ensure that no interview was completed in a time of less than 1/3 of the median interview duration.

Weighting

SPSS was used to run RIM weighting (Random Iterative Methods, or “Raking”).

Household survey responses were weighted to the following targets (using figures derived from neighbourhood level Census data (2021)):

AGE	Thames/Thames	Affinity Thames		IMD Decile	Thames/Thames	Affinity Thames
18-24	11%	9%		1	2.33%	0.34%
25-34	21%	16%		2	12.48%	4.28%
35-44	19%	17%		3	15.22%	8.02%
45-54	17%	18%		4	12.65%	11.32%
55-64	14%	17%		5	10.20%	12.80%
65-74	9%	12%		6	10.09%	11.98%
75+	8%	11%		7	8.98%	10.53%
	100%	100%		8	9.56%	10.97%
				9	9.22%	12.91%
				10	9.25%	16.41%
ETHNICITY	Thames/Thames	Affinity Thames		Unknown	0.01%	0.43%
Asian	16%	15%				
Black	11%	5%				
Mixed/other	10%	7%		GENDER	Thames/Thames	Affinity Thames
White	63%	73%		Male	48%	49%
	100%	100%		Female	52%	51%
					100%	100%

Non-household survey responses were weighted to the following targets (using data derived from BEIS (Department for Business, Energy and Industrial Strategy) 2022 – the Thames Water proxy being deduced from the London and South East regions.):

COMPANY SIZE by total employment	Thames (proxy)
Sole trader: 0 employees	16.2%
Small: 1-49 employees	28.5%
Medium: 50-249 employees	12.3%
Large: 250+ employees	43.0%

Once individual data sets had been weighted, they were merged non-household with Household to the following proportions (reflecting consumption, using data from table 6B.31-34 of the water company’s 2022/23 Annual Performance Report):

% OF TOTAL WATER CONSUMPTION	Thames Thames	Affinity Thames
Household	77.3%	78.6%
Non-household	22.7%	21.4%

3.6 Note on data merging

Thames Water commissioned Accent to test affordability and acceptability of the joint bill/plan in the Thames Thames area, and acceptability only of the wastewater only plan in the Affinity Thames area.

Affordability of the joint bill in the Affinity Thames area was tested, also by Accent, but in a separate project commissioned by Affinity Water.

For the purposes of this report (and the preparation of the SUP14 data for Thames Water), unless specifically stated otherwise:

- Any acceptability figures and analysis are based on the Thames Thames dataset merged with the dataset collected in the Affinity Thames area in the project commissioned by Thames Water.
- Any affordability figures and analysis (including the financial temperature check) are based on the Thames Thames dataset collected in the project commissioned by Thames Water, merged with the dataset collected in the Affinity Thames area in the project commissioned for Affinity Water.

4 FINDINGS

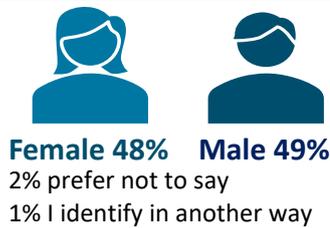
4.1 Introduction

The following section of this report details the findings of the study.

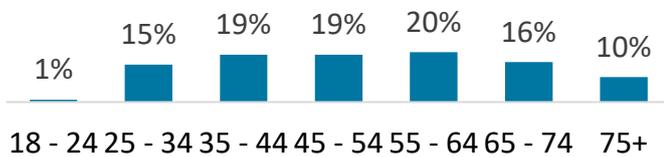
4.2 Household Demographics

1,847 Thames Water customers took part in the Acceptability and Affordability Testing research. 1,347 in the Thames Thames area and 500 in the Thames Affinity area. 1,402 responded to our email invitation and 445 to our postal invitations. This is how their profiles fell out (pre weighting). Percentages may not add up to 100 due to rounding.

Gender



Age



Ethnicity

English, Welsh, Scottish, Northern Irish or British	60%
Any other White background	11%
Indian	5%
Any other Asian background	3%
Irish	2%
Chinese	2%
Caribbean	2%
African	2%
White and Black Caribbean	1%
White and Black African	1%
White and Asian	1%
Any other Mixed background	1%
Pakistani	1%
Bangladeshi	1%
Any other ethnic group	1%
Prefer not to say	6%

IMD decile

1	2%
2	10%
3	13%
4	12%
5	11%
6	11%
7	9%
8	10%
9	10%
10	11%
Unknown	0%

Social Grade

AB	51%
C1C2	25%
DE	17%
Not stated	7%

Vulnerability

... is disabled or suffer(s) from a debilitating illness	15%
... have/has a learning difficulty	5%
... relies on water for medical reasons	5%
... is visually impaired	2%
... am/is over the age of 75 years old	11%
... speaks English as a second language	12%
... is deaf or hard of hearing	6%
... is a new parent	5%
None of these apply to me	52%
Prefer not to say	5%

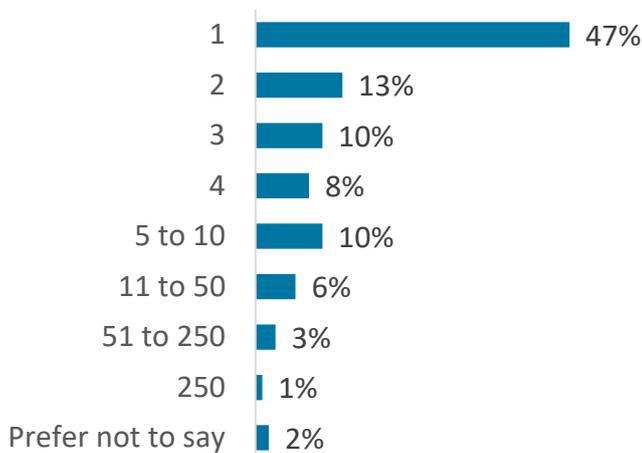
4.3 Non-household Demographics

363 Thames Water business customers took part in the Acceptability and Affordability Testing research. 185 were reached through specialised business panel and 178 through retailers. This is how their profiles fell out.

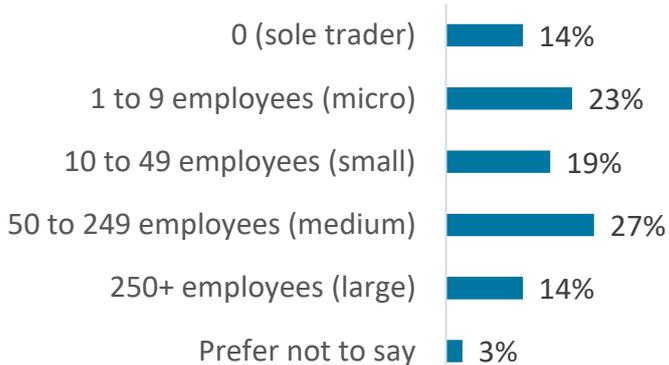
Main use of water on premises

For normal domestic use for your organisation`s customers and employees	78%
For the supply of services your organisation provides	36%
For the manufacturing process which is essential to the running of your organisation	16%
For an ingredient or part of the product or service your organisation provides	16%
None of the above	3%
I don't know	1%

Number of business sites



Number of employees



Industry

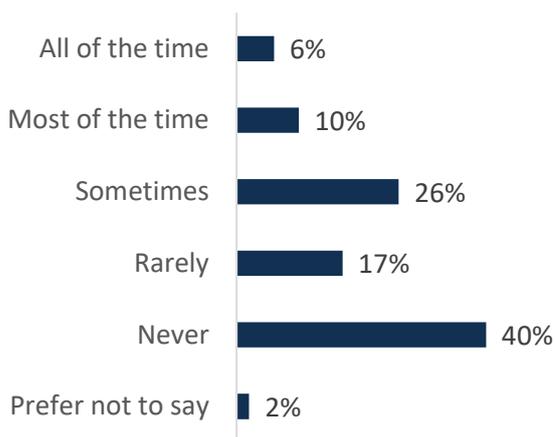
Wholesale and retail trade (including motor vehicles repair)	10%
Manufacturing	9%
Education	9%
Hotels & catering	8%
Human health and social work activities	7%
Arts, entertainment and recreation	7%
IT and Communication	5%
Finance and insurance activities	5%
Real estate activities	5%
Professional, scientific and technical activities	5%
Construction	4%
Administrative and Support Service Activities	4%
Other service activities	4%
Transport and storage	2%
Agriculture, forestry and fishing	1%
Energy or water service & supply	1%
Public administration and defence	1%
Other	10%
Prefer not to say	4%

Percentages may not add up to 100 due to rounding.

4.4 Household Financial Temperature Check

- 2 in 5 (40%) of those we spoke to say they never struggle to pay their bill, whilst 42% do struggle to pay their bills at least sometimes.
 - Females in particular struggle to pay their bill at least sometimes, with 54% saying they struggle to pay at least sometimes (compared to 27% of males), this is a statistically significant difference. 52% of males says they never struggle to pay their bills compared to a significantly lower proportion, 28%, of females.
 - 70% of SEG DE and 55% of C1C2 say they struggle to pay at least sometimes, compared to only 40% of SEG AB – this difference is significant.

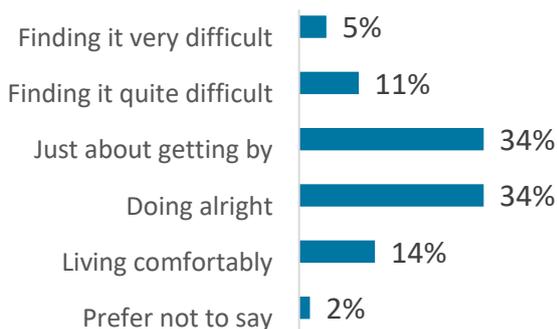
Figure 1. Q9 Thinking about your finances over the last year, how often, if at all, has your household struggled to pay at least one of its bills.



Base: All household participants weighted base (1,723)

- Given the current economic situation, it is perhaps unsurprising that half of the household participants (50%) we spoke to are finding it difficult to manage financially or are just about getting by.
 - Again, females (59%) are significantly more likely to be struggling to manage financially compared to (40%) males.
 - Alongside 60% of those that self-selected as vulnerable, 79% of SEG DE and 58% of C1C2 also struggle managing their finances – statistically significant when compared to those non vulnerable (40%) and other social grades (AB 34%)

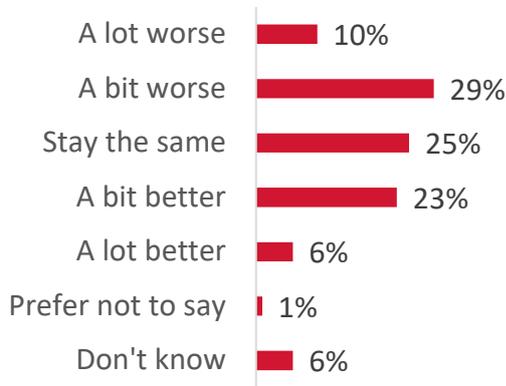
Figure 2. Q10 Overall, how well would you say you are managing financially now?



Base: All household participants weighted base (1,723)

- Close to 2 in 5 households (39%) expect their financial situation to worsen in the next few years.
 - This increases to 42% among those that currently have difficulties paying their bills

Figure 3 Q11 Thinking about your household's/organisation's financial situation over the next few years up to 2030, do you expect it to get?

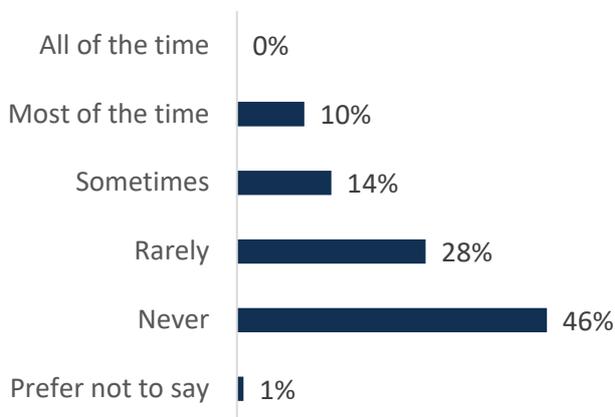


Base: All household participants weighted base (1,715)

4.5 Non-household Financial Temperature Check

- Close to half (46%) of businesses say they never struggle to pay their bills, but almost a quarter do have some difficulty paying their bills (24%).

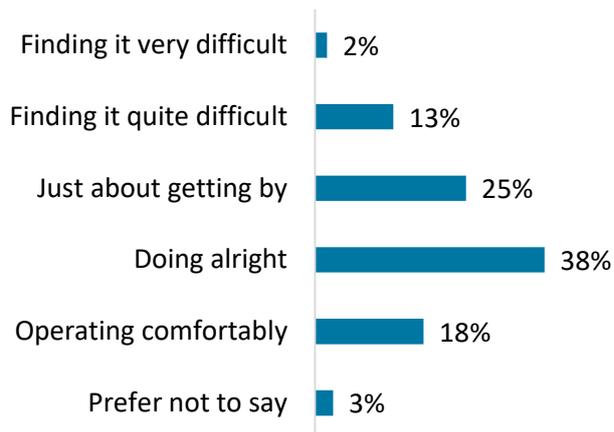
Figure 4. Q9 Thinking about your finances over the last year, how often, if at all, has your organisation struggled to pay at least one of its bills.



Base: All non-household participants weighted base (497)

- 2 in 5 (40%) of businesses are operating with financial difficulty. Only 18% saying they are operating comfortably.

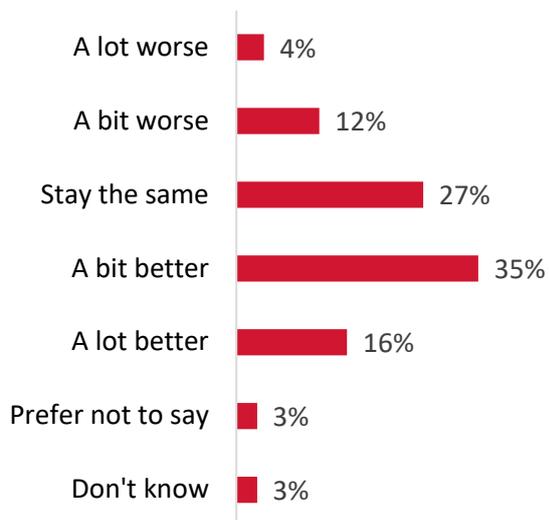
Figure 5. Q10 Overall, how well would you say your organisation is managing financially now?



Base: All non-household participants weighted base (497)

- Over half the businesses (51%) of businesses expect their financial situation to improve in the years to come and only 16% expect it to worsen.

Figure 6 Q11 Thinking about your household/organisation`s financial situation over the next few years up to 2030, do you expect it to get



Base: All non-household participants weighted base (497)

4.6 Affordability

- The prevalence of participants stating that the proposed bill increases would be very or fairly easy to afford, was low, at 20% overall (16% of households and 32% of non-households).
 - This did not vary significantly across the two supply areas (20% in Thames Thames, 19% in Affinity Thames)
- 48% that stated the bill increases would be either fairly or very difficult to afford.
- 29% stated that it would be neither easy nor difficult.

- In an additional question asked after the main body of the questionnaire, and not used in the SUP14 table submission participants were re-asked the affordability question having seen the plan. 23% of participants said the bill increase would be very or fairly easy to afford (with 40% saying fairly or very difficult, and 35% neither easy nor difficult).

4.7 Household Affordability

- Currently, 42% of households find their existing water and sewerage bills fairly or very easy to afford.
- 16% of household customers thought that the proposed bill would be fairly or very easy to afford.
 - A significantly higher number of females (59%) said the bill increase will be fairly or very difficult to afford compared to males (40%).
 - Unsurprisingly a significantly higher proportion of males (22%) said the bill increase will be fairly or very easy to afford compared to females (12%).
 - A significantly higher number of SEG DE (70%) said they would find the bill increase fairly or very difficult to afford compared to the other SEG (AB 40%, C1C2 55%)
 - A significantly higher proportion of SEG AB (22%) find the bill increase fairly or very easy to afford compared to other SEG (C1C2 14%, DE 8%).
 - A significantly higher proportion of participants over 65 stated the bill increase would be easy to afford than younger age groups.

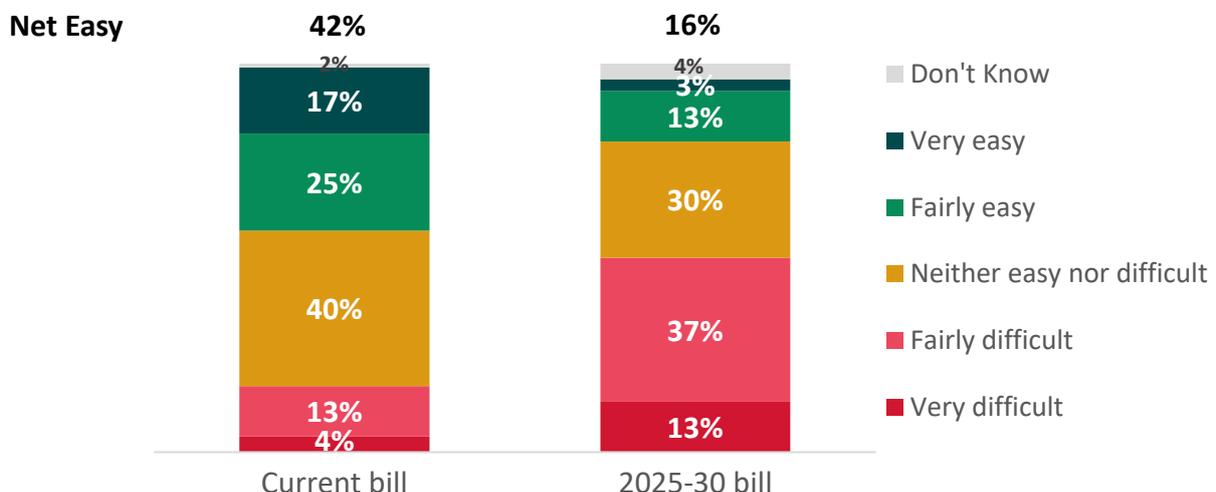


Figure 7. Q13 How easy or difficult is it for you to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? Base: All household participants weighted base (1,723)

- Finding the proposed increase in the water and sewage bill very or fairly easy to afford is far less likely for those that are already struggling financially (finding it very or quite difficult to manage financially). 56% say they are finding it very or fairly difficult to pay their current water bill, however this number increases to 85% when asked about the 2025-30 bill.
- As expected, finding the future bill fairly or very easy to afford was also less likely for those on the lower end of the income scale. Especially so for those earning under £16,000, where 75% said it would be fairly or very difficult to afford. These households are significantly more likely to find their future bills fairly or very difficult to afford compared to any household earning above that amount.

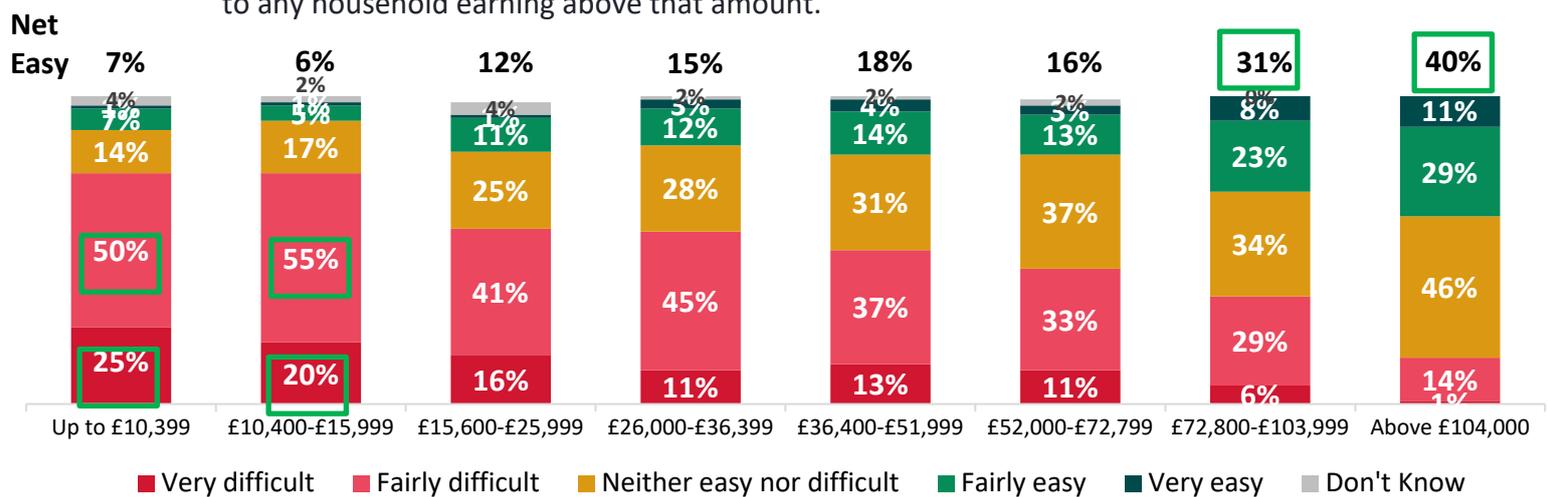


Figure 8. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? Base: All household participants weighted base Up to £10,399 (112), £10,400-£15,999 (165), £15,400- 25,999 (173) £26,000-£36,600 (185), £36,400-£51,999 (230), 52,000 £72,799 (172), £72,800-£103.999 (159), Above 104,000 (159)

Denotes significantly higher

- Finding the future bill fairly or easy to afford is higher among those customers that have a water meter compared to those that don't, however this difference is not significant. 20% of those with a water meter say they would find it fairly or very easy to pay the bill in the future compared to 16% of those that currently don't have a meter.

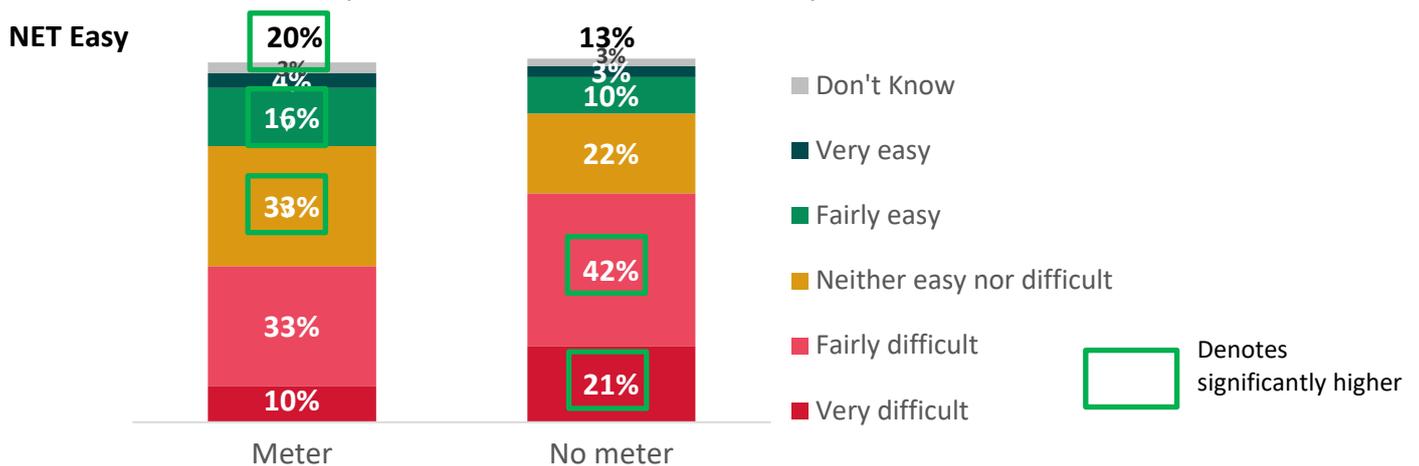


Figure 9. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? Base: All household participants weighted base with meters (691) and household with No meter (464)

- A significantly lower proportion of households that have members with any vulnerability (12%) found the future bill very or fairly easy to afford compared to households without vulnerable members (21%).
- These households are also significantly more likely to find the bill fairly or very difficult to pay (56%) compared to those without a vulnerable members (45%).
- When looking at vulnerability by type* we see those that are considered vulnerable for medical reasons are significantly more likely to say they will find these bills fairly or very difficult (71%) compared to those considered vulnerable because of communication (57%) or life stage (40%).

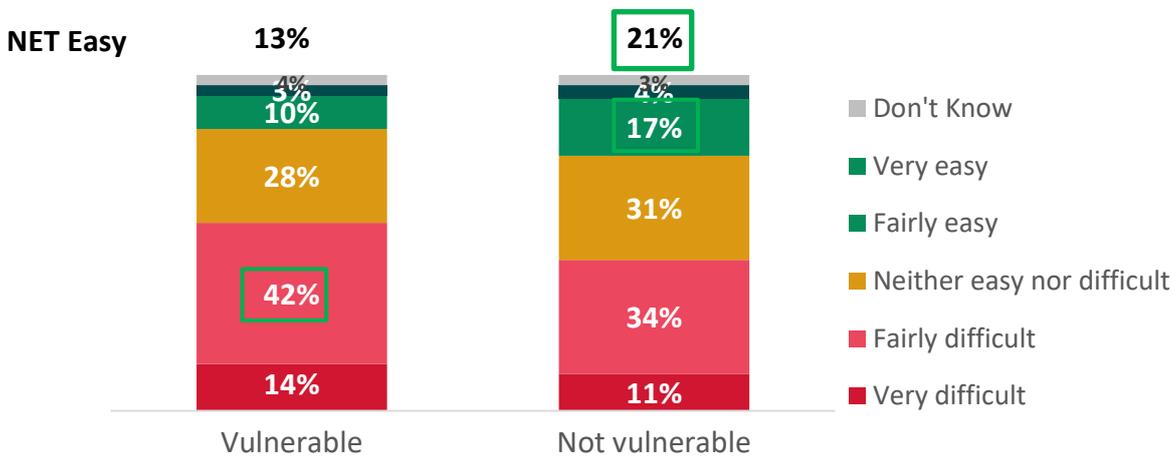


Figure 10. Q14 How easy or difficult do you think it would be for you to afford these water/sewerage bills? Base: All household weighted base with vulnerable members (772) and household with no vulnerable members (851) *Details of conditions listed under each vulnerability can be found in Appendix E

- After seeing the business plan the proportion of those that say the proposed bill would be fairly or very easy to afford increases by 6% to 22%.
 - Before seeing the plan 50% of participants found the proposed bill fairly or very difficult to afford, however this reduced to 43% once they had seen the proposed plan.

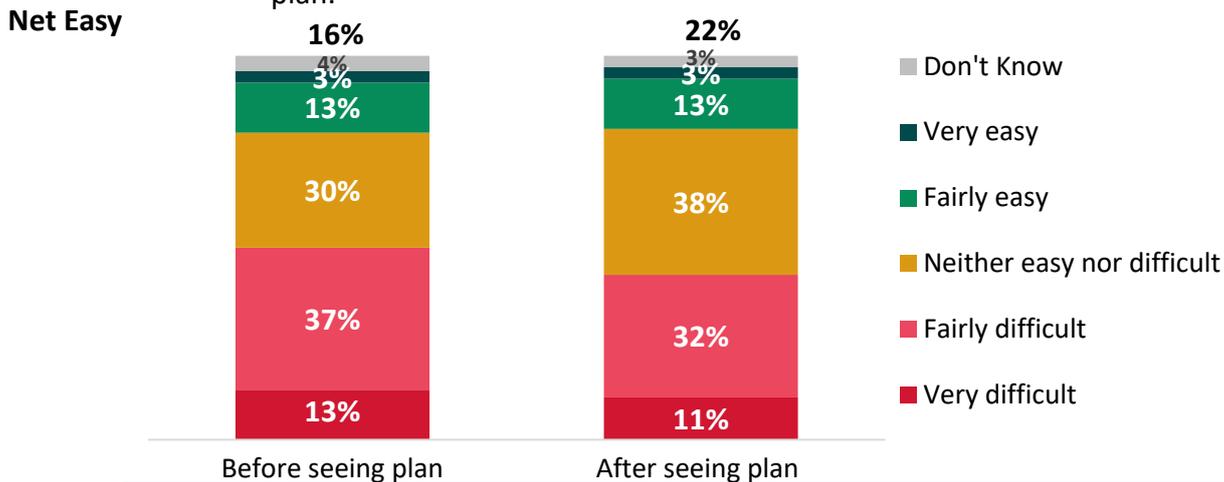


Figure 11. Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills? Q35b. Knowing what you know now about how that money is intended to be used, how easy or difficult do you think it would be for you or household/organisation to afford these water/sewerage bills? Base all Thames dual supply household participants unweighted base pre seeing plan (1,723), post seeing the plan (1,657)

- Of the participants that did not find paying the future bill fairly or very easy to afford, these are the things they would look to do in order to be able to pay for the bill increase:
 - top 3 actions they would take are spend less on non-essentials(61%), use less water (48%) and eat out less (44%)

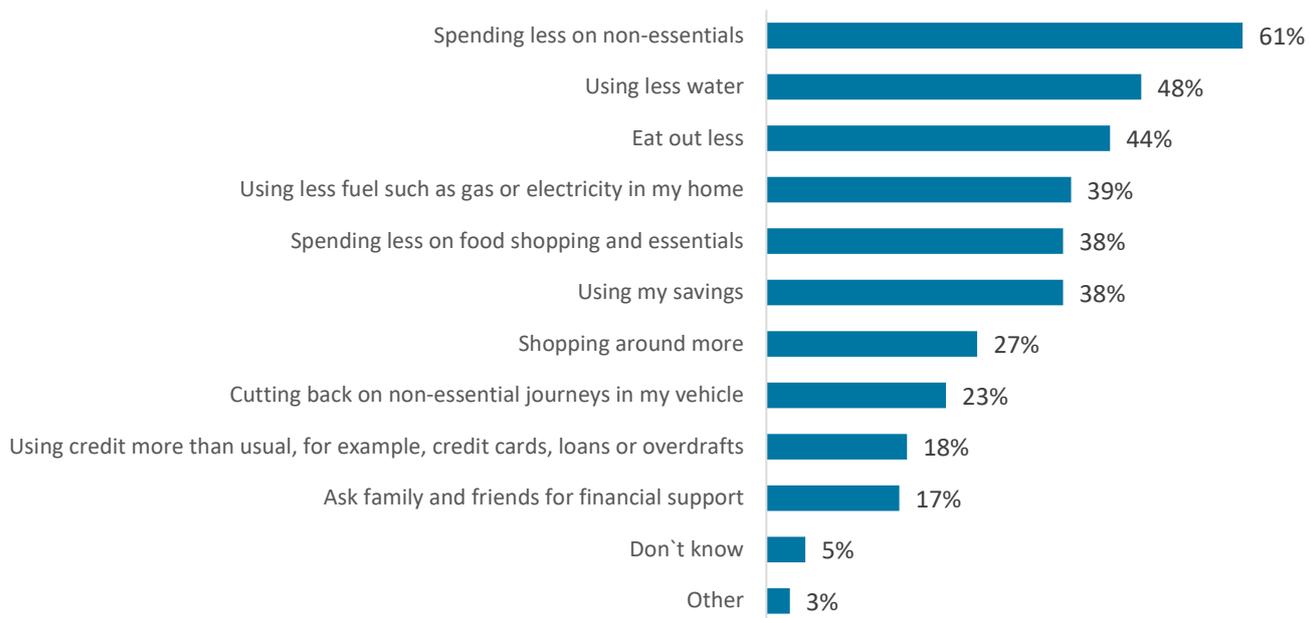


Figure 12. Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030? All household participants (1,375)

4.8 Non-household Affordability

- Affordability is higher among the non-household population compared to the household.
- Over half of businesses (51%) find their current bills fairly or very easy to afford. This however drops down to 32% when thinking about the future bill.

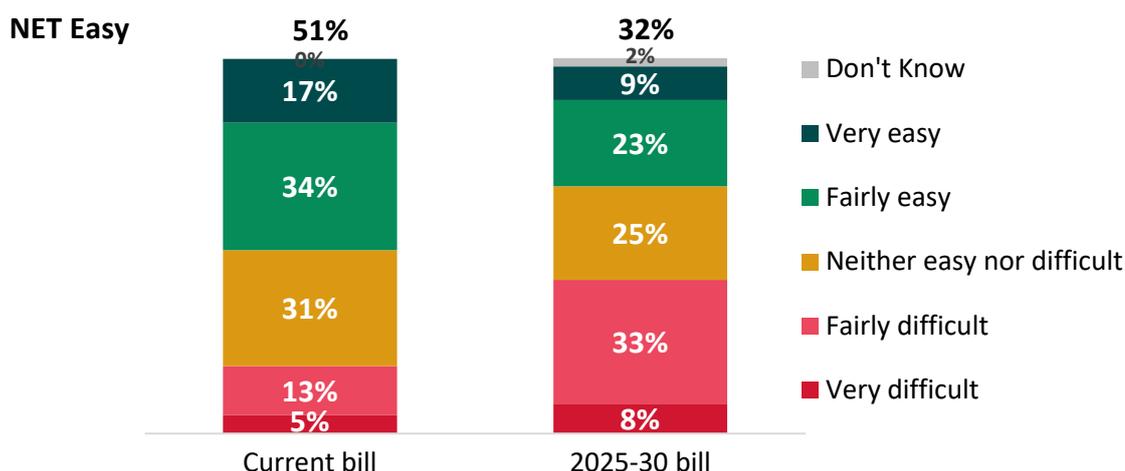


Figure 13. Q13 How easy or difficult is it for your company/organisation to afford to pay your current water and sewerage bill? Q14 How easy or difficult do you think it would be for your company/organisation to afford these water/sewerage bills? Base: All non-household participants weighted base (497)

- Unlike household participants, unmetered businesses seemed more resilient to bill increases
- Even though non-metered businesses seem more resilient than metered ones, the difference is not significant.

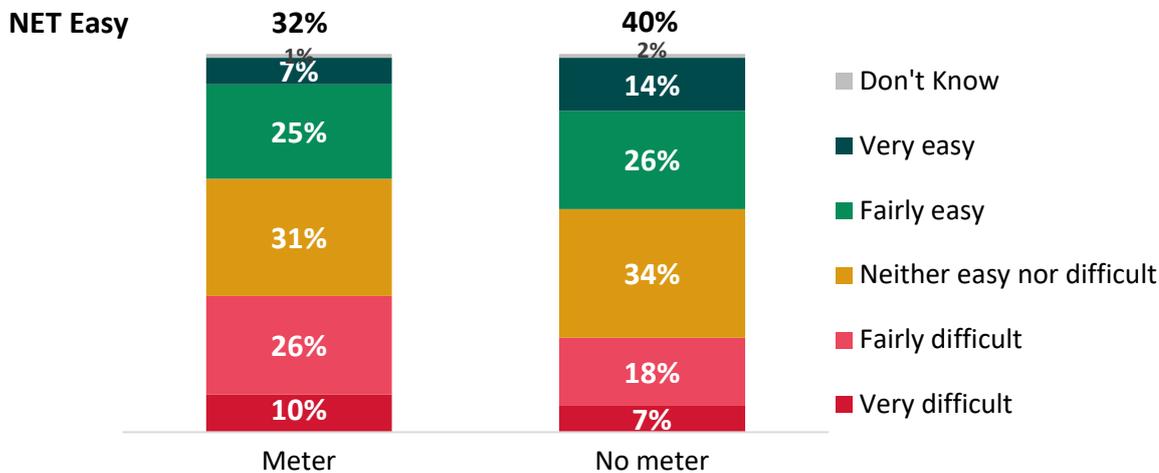


Figure 14. Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills? Base: All non-household participants weighted base with (296) and without (80) water meters

- After seeing the business plan the proportion of non-household that say the proposed bill would be fairly or very easy to afford increases by 6% to 38%.
 - Before seeing the plan 41% of participants found the proposed bill fairly or very difficult to afford, however this reduced to 31% once they had seen the proposed plan.

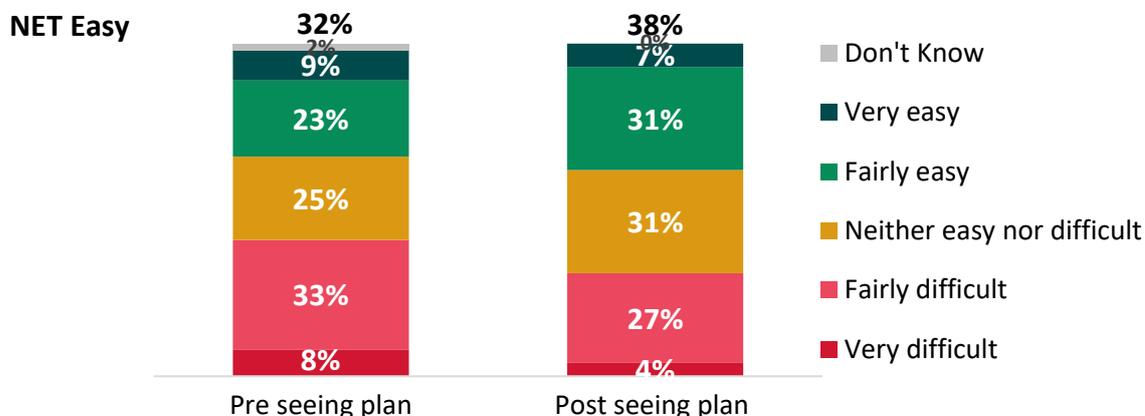


Figure 15. Q14. How easy or difficult do you think it would be for you or your company/organisation to afford these water/sewerage bills? Q35b. Knowing what you know now about how that money is intended to be used, how easy or difficult do you think it would be for you or household/organisation to afford these water/sewerage bills? Base: All Thames dual supply area non-household participants unweighted base pre plan (497) post plan (488)

4.9 Acceptability

- 65% of participants have found the proposed plans acceptable or completely acceptable.
 - 62% of households and 75% of non-households saying the plan was acceptable or completely acceptable
 - 65% of participants in the Thames Thames service area and 64% in the Affinity Thames area said the plan was acceptable or completely acceptable
- 20% of participants have found the proposed plans unacceptable or completely unacceptable.
 - 21% of households and 14% of non-households saying the plan was unacceptable or completely unacceptable
 - 20% of participants in the Thames Thames service area and 18% in the Affinity Thames area said the plan was unacceptable or completely unacceptable
- 15% of participants didn't know/were unable to say.
 - 21% of households and 14% of non-households didn't know/were unable to say (a statistically significant difference)
 - 20% of participants in the Thames Thames service area and 18% in the Affinity Thames area didn't know/were unable to say

4.10 Household Acceptability

- Close to two thirds (62%) of Thames Water household customers we spoke to found the proposed plan acceptable or completely acceptable.
- 22% said that the plan was unacceptable or completely unacceptable, with 16% not knowing/unable to say.



Figure 16. Q32 Based on everything you have seen and read about Thames Water' proposed business plan, how acceptable or unacceptable is it to you? Base: All household participants weighted base (1,715)

Reasons for unacceptability

- Perhaps unsurprisingly given the recent coverage in the media, 36% have said they do not trust the company to make these improvements. This was followed by 32% saying the company profits are too high and 24% quoted the bill increase being too expensive and that the companies should pay for these service improvements.



Figure 17. Q33. What are the two main reasons that you feel the proposals for your water services are unacceptable? Base: All household participants weighted base that felt proposals were unacceptable (366)

Reasons for acceptability

- Customers that found the plan acceptable support what Thames Water is trying to do long term (53%), feel like their plans are focusing on the right services (46%) and trust Thames to do what is best for their customers (22%)

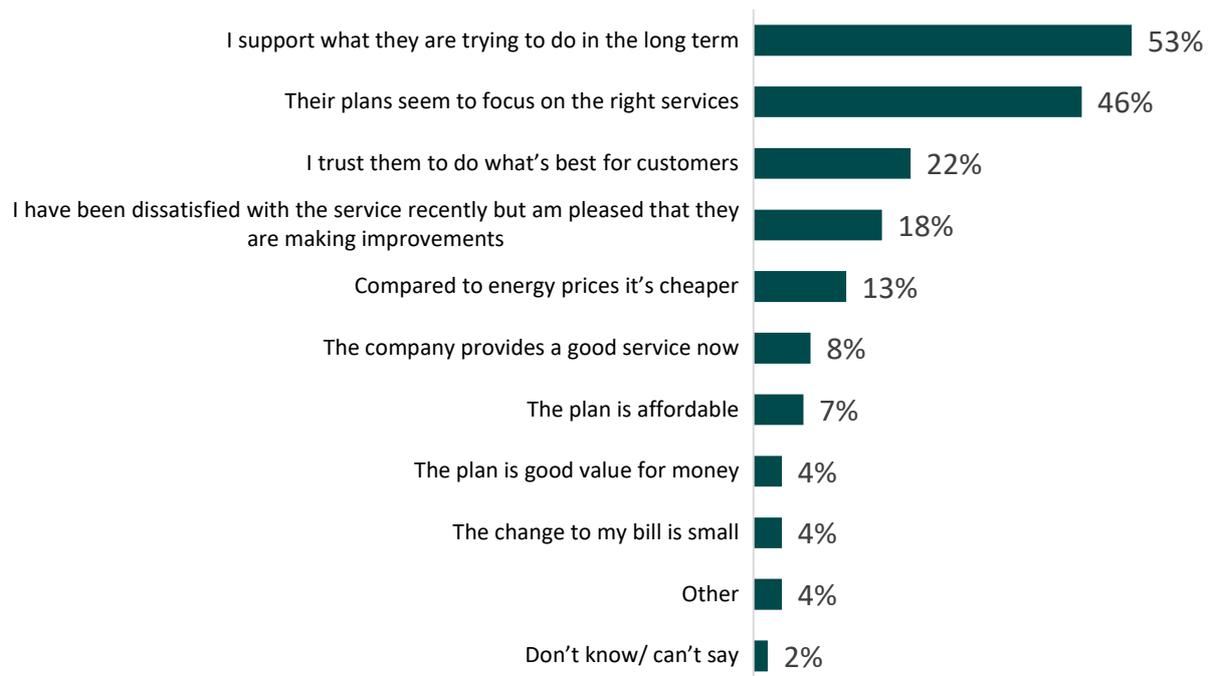


Figure 18 Q34. What are the two main reasons that you feel the proposals for your water supply are acceptable? Base: All household participants that felt proposals were acceptable (1,067)

4.11 Non-household Acceptability

- Acceptability is a slightly higher among non-household participants than household participants. 75% of the businesses we spoke to found the proposed business plan acceptable or completely acceptable.
- 14% said that the plan was unacceptable or completely unacceptable, with 11% not knowing/unable to say.



Figure 19. Q32 Based on everything you have seen and read about Thames Water' proposed business plan, how acceptable or unacceptable is it to you? Base: All non-household participants weighted base (494)

Reasons for unacceptability

- Only 14% of non-household participant felt the proposed plan was unacceptable or completely unacceptable. The top 3 reasons: were lack of trust (31%), participants expecting better service improvements (30%) and company profits been seen as too high (22%)



Figure 20. Q33. What are the two main reasons that you feel the proposals for your water services are unacceptable? Base: All non-household participants weighted base that felt proposals were unacceptable (70)

Reasons for acceptability

- Similarly to household customers, businesses find the plan acceptable because they support what they are trying to do long term (57%), feel Thames Water plans focus on the right services (46%) and feel that things are improving (25%).

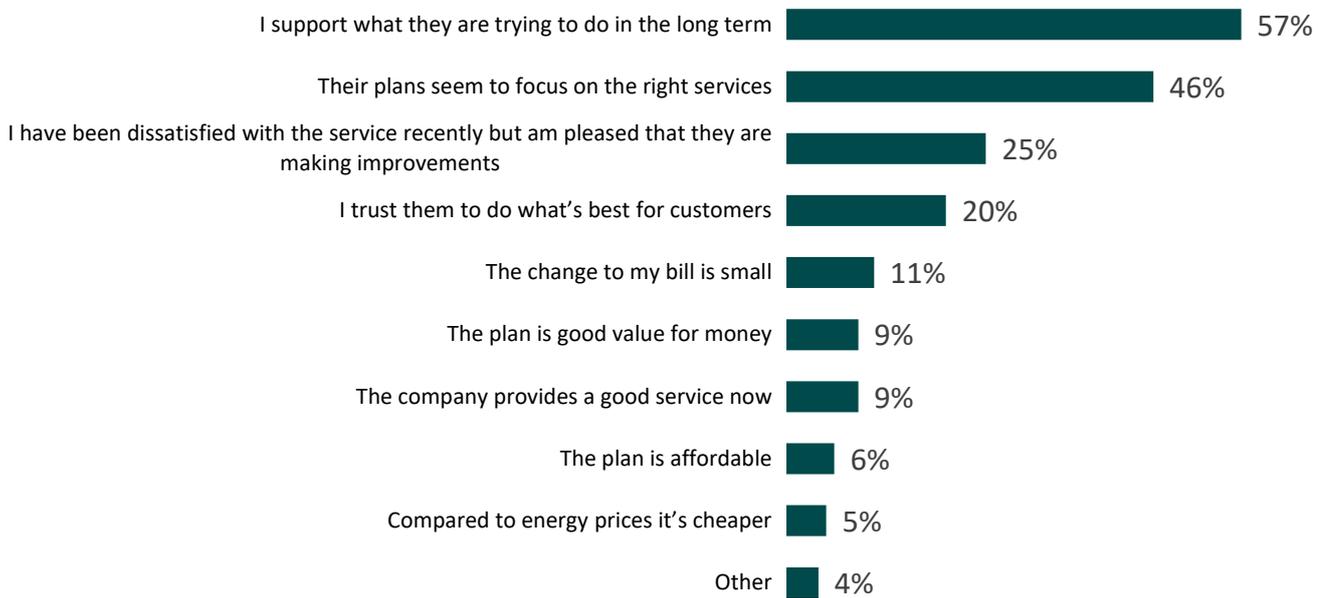


Figure 21 Q34. What are the two main reasons that you feel the proposals for your water supply are acceptable? Base: All non-household participants weighted base that felt proposals were acceptable (371)

4.12 Intergenerational Phasing

- For both businesses and household customers, the preferred phasing option amongst those able to choose was for an immediate increase in bills rather than a delay Over 2 in 5 (43%) of household customers were unable or unwilling to answer the question (compared to only a 21% of businesses), a notable volume of participants
- Non-household customers seem less reluctant than household customers for the price increases to be put onto future customers

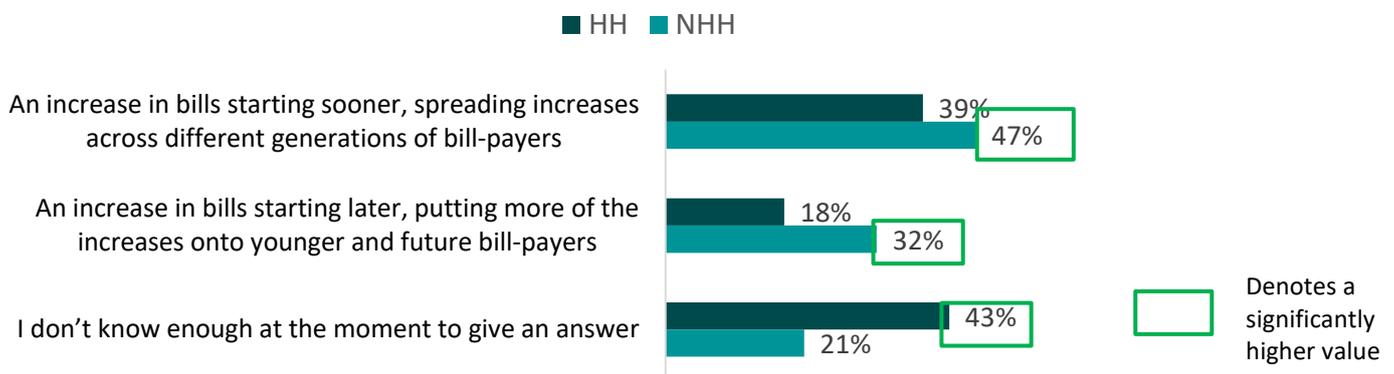


Figure 22 Q35. Long term investment by Thames Water will require an increase in customer bills. Bills could increase in different ways over time. Which one of the following options would you prefer? Base: All household participants weighted base (1,715) and all non-household participants weighted base (495)

4.13 Performance commitments – Water related

- There was real engagement from both household and non-household customers with the performance commitments as the majority were able to choose an option at these questions. Only 4% of the household and 2% of the non-household customers weren't able to decide.

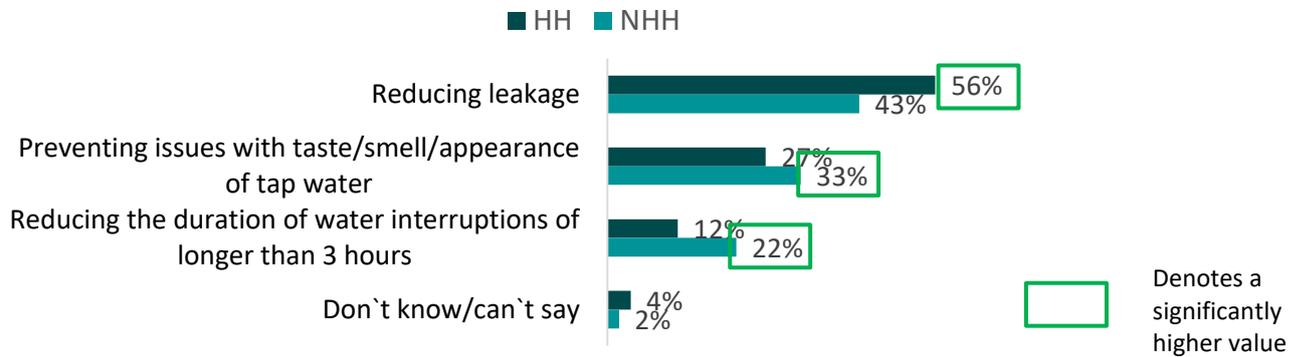


Figure 23. Q19. Based on what you have just read, which of these three parts of the business plan is the most important to you? Base: All household participants weighted base (1,291) and all non-household participants weighted base (379)

- Reducing leaks was chosen as the most important performance commitment by household customers and non-household customers alike
- Preventing issues with the quality of water were also rated significantly more important for non-household customers (33%) compared to household (20%)
 - Preventing issues with the quality of water was rated significantly higher among those that have self-selected as vulnerable (30%) compared to those that are not vulnerable (25%)
- Reducing the duration of interruption was rated significantly more important by non-household customers (22%) compared to household customers (12%).

4.14 Performance commitments – sewerage and pollution related

There was also good engagement from both household and non-household customers with these performance commitments, as the majority were able to choose an option at these questions. Only 9% of the household and 3% of the non-household customers weren't able to choose an option.

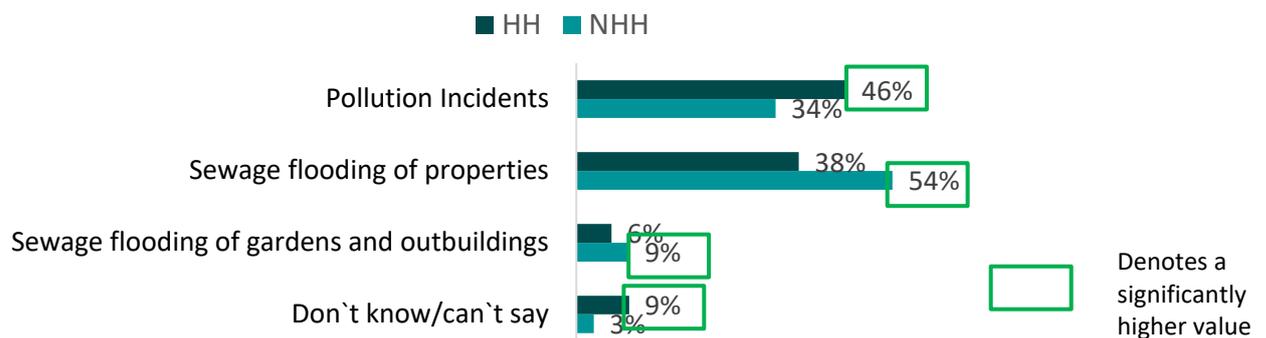


Figure 24. Q23. Based on what you have just read, which of these three parts of the business plan is the most important to you? Base: All household participants weighted base (1,715) and all non-household participants weighted base (495)

- From this bank of commitments Pollution incidents was chosen as the top commitment overall, however it was significantly more important to households than businesses (who ranked it second)
- Sewage flooding of properties was chosen as the second most important commitment overall, however this is the highest one for non-household customers (with over half choosing this as their main priority, a significantly higher proportion than household).
- Sewage flooding gardens and outbuildings was the third chosen commitment. Significantly higher proportion of non-household customers chose this over household.

4.15 Enhancement cases

Enhancement cases were presented in two questions, as two banks of two. There was good engagement with both questions as most household and non-household participants were able to choose form one of the two options.

- In the first bank Water Resource Management: water demand, helping customers save water was chosen as the top option, with a significantly higher number of non-household choosing this compared to household
 - This was significantly higher for females (59%) than for males (50%); And SEG DE (63%) compared to SEG AB (52%)
- Water Resource Management: water supply, providing new sources of Water was chosen as second option with a significantly higher proportion of household customers choosing this compared to non-household
 - This was also significantly higher for SEG AB (43%) than for SEG DE (29%)

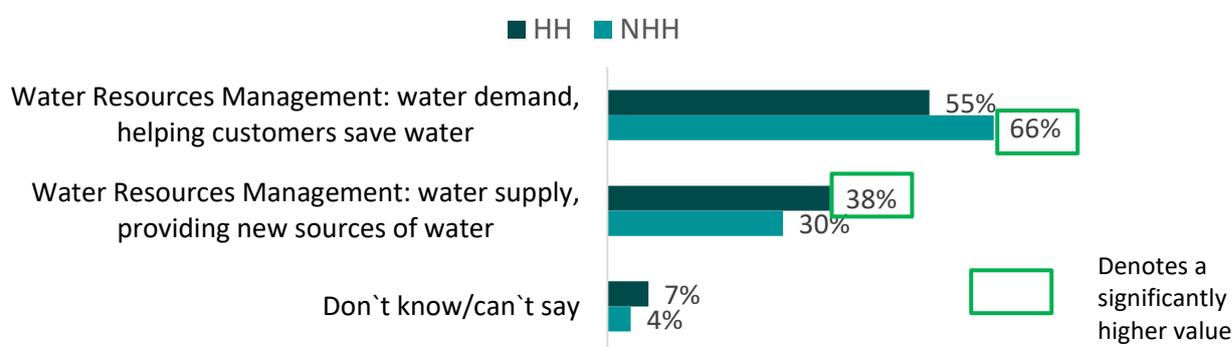


Figure 25. Q26. Based on what you have just read, which of these four parts of the business plan is the most important to you? Base: All household participants weighted base (1,291) and all non-household participants weighted base (397)

- From the second bank, reducing the pollution of rivers from sewage spills came as top option for both sets of customers, however a significantly higher proportion of non-household customers chose this
- Improving the capacity of sewage treatment works came second with roughly the same proportion of household and non-household customers choosing this option

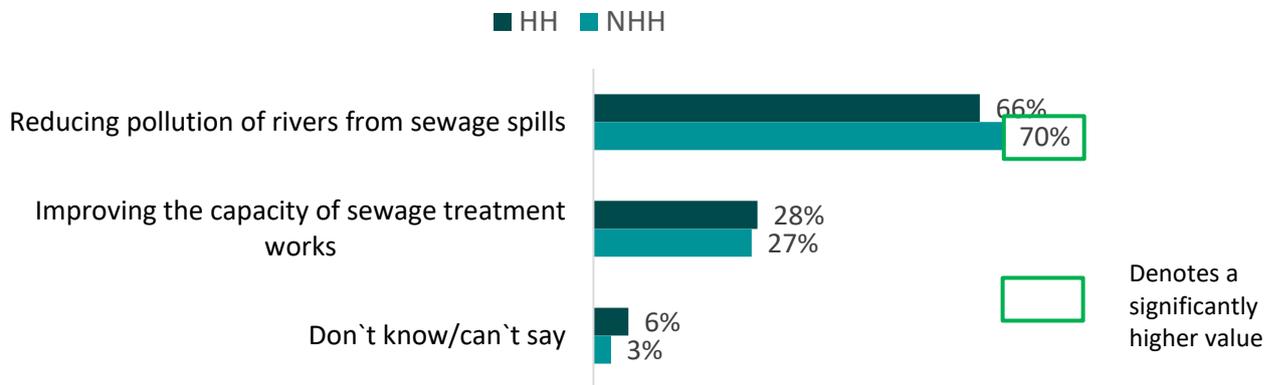


Figure 26. Q29. Based on what you have just read, which of these four parts of the business plan is the most important to you? Base: All household participants weighted base (1,715) and all non-household participants weighted base (495)

APPENDIX A

Adherence to Ofwat's standards for high quality customer research

Requirement	How the study has adhered
<ul style="list-style-type: none"> ■ Useful and contextualised 	<p>Research objectives aligned to PR24 and undertaken in accordance with Ofwat & CCW's published guidance.</p>
<ul style="list-style-type: none"> ■ Neutrally designed 	<p>Outside of the prescribed Ofwat guidance, every effort has been made to ensure that the research is neutral and free from bias. All elements of design were checked and challenged by Thames Water' CCG. Where there is the potential for bias, this has been acknowledged in the report.</p>
<ul style="list-style-type: none"> ■ Fit for purpose 	<p>Research undertaken in accordance with Ofwat & CCW's published guidance. Cognitive testing was carried out to ensure the complex subject matter was presented in the questionnaire in a way which was as understandable and engaging as possible for respondents. Visual stimulus was created in order to aid participant understanding of the proposed plan.</p>
<ul style="list-style-type: none"> ■ Inclusive 	<p>Household and business customers were represented. Lower IMD deciles were over-sampled and higher IMD deciles under-sampled, to compensate for lower response rates. The response rates were monitored across a range of demographics to ensure representation, although the prescribed methodology prevents any interventions in this regard. Accommodation was made for any accessibility requests (including paper/postal versions, large print, high contrast print), via a freephone number.</p>
<ul style="list-style-type: none"> ■ Continual 	<p>This research builds on the foundation of the qualitative work and contributes towards the ongoing development of policy and plans.</p>
<ul style="list-style-type: none"> ■ Independently assured 	<p>All research was conducted by Accent, an independent market research agency. Thames Water collaborated with their Customer Challenge Group, who reviewed all research materials and provided a check and challenge approach on the method and findings. Third line assurance by Savanta.</p>
<ul style="list-style-type: none"> ■ Shared in full with others 	<p>The research will be published and shared on the Thames Water website.</p>
<ul style="list-style-type: none"> ■ Ethical 	<p>Research conducted in accordance with the Market Research Society code of conduct and conforming to the requirements of ISO 20252:2019. Accent and Thames Water were subject to strict data protection protocols.</p>

APPENDIX B

Additional Information

The following information on **Quantitative** work is available upon request:

- Assessment of sample representation of target population and respective implications
- Reasons for differences in planned and achieved sample and how any problems in this respect were dealt with
- The number of interviewers or moderators, if applicable
- The fieldworker/moderator validation methods, if applicable
- The weighting procedures, if applicable
- Any methods of statistical analysis used
- The estimating and imputation procedures, if applicable
- The results that are based on subgroups and the number of cases used in subgroup analysis
- Variance and estimates of non-sampling errors or indicators thereof (when probability samples are used)

APPENDIX C

Limitations

Limitation	Impact
<p>Small non-household participants are unlikely to be in scope (either by not having a dedicated business water supply, or by being in serviced offices with inclusive water)</p>	<p>The non-household sample is skewed towards larger organisations.</p>
<p>Some undesirably high weighting values were evident</p>	<p>The household sample was (as a result of the prescribed methodology) heavily skewed towards older participants therefore the youngest age groups attracted some undesirably high weights (precluding reliable analysis into that age category in particular. Similarly, micro non-household were not represented particularly well in the sample (due to the prevalence of small businesses that do not have a dedicated non-household water supply, which made them ineligible for participation) and were weighted up more than might otherwise have been desirable. Impact to the overall affordability & acceptability figures was minimal.</p>

APPENDIX D

Fieldwork Materials

Postal invitation – Thames dual supply

The Occupier
Address



Accent

3 Orchard Place
London
SW1H 0BE

Unique ID number: XXXX
PIN: nnnn

Dear Sir/Madam

Water services research: complete a survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of Thames Water, the organisation which supplies water and sewerage for customers in your area.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help Thames Water plan investment in their service from 2025 to 2030 and will influence your future water services and bills.

Anyone who is eligible to take part and completes the full survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take no longer than 15 minutes to complete. You can check your eligibility to participate, and complete the survey online by entering the following link or scanning the QR code: <https://acsvv.com/3598ttsurvey> and entering your Unique ID (XXXX) and PIN (nnnn).



Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6592. You will be asked to leave your name and the 4 digit unique ID number (XXXX) and PIN (nnnn). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is 3rd of September 2023. Thames Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at Thameswatersurvey@accent-mr.com or by freephone on 0800 099 6592.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AB

Postal invitation – Affinity Thames supply area

The Occupier
Address



Accent

3 Orchard Place
London
SW1H 0BF

Unique ID number: XXXX
PIN: nnnn

Dear Sir/Madam

Water services research: complete a survey and receive a £10 voucher

This letter has been sent to you by Accent (an independent market research company) on behalf of Thames Water, the organisation which supplies sewerage services for customers in your area.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help Thames Water plan investment in their service from 2025 to 2030 and will influence your future water services and bills.

Anyone who is eligible to take part and completes the full survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

The questionnaire will take no longer than 15 minutes to complete. You can check your eligibility to participate, and complete the survey online by entering the following link or scanning the QR code: <https://acsvv.com/3598tvsurvey> and entering your Unique ID (XXXX) and PIN (nnnn).



Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please call FREEPHONE 0800 099 6592. You will be asked to leave your name and the 4 digit unique ID number (XXXX) and PIN (nnnn). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is 3rd of September 2023. Thames Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions, please don't hesitate to contact the research team at Thameswatersurvey@accent-mr.com or by freephone on 0800 099 6592.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AR

Email invitation



Accent

Dear #name#

Water services research: complete a 15-minute online survey and receive a £10 voucher

This email has been sent to you by Accent (an independent market research company) on behalf of Thames Water, the organisation which supplies water and sewerage for customers in your area.

We are looking for people to complete a survey about their views on water and sewerage services. The research will be used to help water companies plan investment in their service from 2025 to 2030 and will influence your future water services and bills. The research is being conducted under the Market Research Society Code of Conduct, which means that any answers you give will be treated in confidence.

Anyone eligible, who completes the survey, will receive a £10 voucher (an Amazon voucher, an M&S voucher or a Love2Shop voucher). Alternatively we can donate your incentive to WaterAid. Details on how claim your voucher are given at the end of the survey.

[Click here to check eligibility, and to take part.](#)

(The survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen)

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [here](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **3rd of September 2023**. Thames Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions about the research, please do reach out to us at Thameswatersurvey@accent-mr.com or 0800 099 6592.

With best wishes,

Julian Hollo-Tas
Project Manager.



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AB

Email Reminder



Accent

Dear #name#

Water services research: complete a 15-minute online survey and receive a £10 voucher - REMINDER

This email has been sent to you by Accent (an independent market research company) on behalf of Thames Water, the organisation which supplies water and sewerage for customers in your area.

We are still looking for people to complete a survey about their views on water and sewerage services. The research will be used to help water companies plan investment in their service from 2025 to 2030 and will influence your future water services and bills. The research is being conducted under the Market Research Society Code of Conduct, which means that any answers you give will be treated in confidence.

Anyone eligible, who completes the survey, will receive a £10 voucher (an Amazon voucher, an M&S voucher or a Love2Shop voucher). Alternatively we can donate your incentive to WaterAid. Details on how claim your voucher are given at the end of the survey.

[Click here to check eligibility, and to take part.](#)

(The survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen)

Alternatively, you can fill the survey in by pen and paper. To request a paper version of the survey (or if you have any other accessibility requests) please fill in a request form [here](#). We will send a paper version of the survey by post, and include a FREEPOST return envelope for you to post it back.

The final date for us to receive completed surveys is **10th of September 2023**. Thames Water will be very grateful if you are able to complete the survey, but taking part is completely optional.

If you have any questions about the research, please do reach out to us at Thameswatersurvey@accent-mr.com or 0800 099 6592.

With best wishes,

Julian Hollo-Tas
Project Manager.



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, EC1Y 2AB

Paper survey cover – Thames dual supply area

The Occupier
Address



Accent

3 Orchard Place
London
SW1H 0BF

Unique ID number: XXXX
PIN: 0000

Dear Sir/Madam

Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for Thames Water. Please find it attached. This pack should contain:

- (1) This letter
- (2) A paper version of the survey
- (3) A reply envelope (First Class pre-paid - no stamp required)

Anyone who is eligible to take part and completes the full survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

Just post the completed survey back by the date stated. Or, you can also still check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsvv.com/3598ttsurvey> and entering your Unique ID (XXXX) and PIN (0000).



Please note: the final date for us to receive completed surveys (including paper submissions) is Tuesday 12th September 2023.

If you have any questions, please don't hesitate to contact the research team at Thameswatersurvey@accent-mr.com.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, E2 9EQ

Paper survey cover – Affinity Thames supply area

The Occupier
Address



Accent

3 Orchard Place
London
SW1H 0BF

Unique ID number: XXXX
PIN: 0000

Dear Sir/Madam

Water services research: your requested survey

Thank you for requesting a paper version of the survey we are conducting for Thames Water. Please find it attached. This pack should contain:

- (1) This letter
- (2) A paper version of the survey
- (3) A reply envelope (First Class pre-paid - no stamp required)

Anyone who is eligible to take part and completes the full survey will receive a £10 voucher (an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

How to take part

Just post the completed survey back by the date stated. Or, you can also still check your eligibility to participate and complete the survey online by entering the following link or scanning the QR code: <https://acsrv.com/3598tvsurvey> and entering your Unique ID (XXXX) and PIN (0000).



Please note: the final date for us to receive completed surveys (including paper submissions) is Tuesday 12th September 2023.

If you have any questions, please don't hesitate to contact the research team at Thameswatersurvey@accent-mr.com.

Yours faithfully

Julian Hollo-Tas, on behalf of the study team



Registered in London No. 2231083. Accent Marketing & Research Limited. Registered Address: 30 City Road, London, E2 9AN

Questionnaire (Online version – Thames Dual Supply area)

Accent



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Thames Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

NOT PANEL: Anyone completing the survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

IF HH: Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

IF HH: How old are you?

OPEN TEXT RESPONSE BOX

Prefer not to say **THANK AND CLOSE**

Under 18 **THANK AND CLOSE**

PN: PLEASE RECODE IN THE FOLLOWING AGE BANDS

18-24

25-34

35-44

45-54

55-64

65-74

75+

IF HH: Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Thames Water is your water supplier, and is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

IF NHH: Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes

No **THANK AND CLOSE**

IF NHH: Is Thames Water responsible for the water and sewerage services at your organisation?

Yes

No **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Thames Water area. Is that OK?

Yes

No **THANK AND CLOSE**

□ Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

□ Affordability

We are now going to ask you some questions about your **[IF HH]** household's **[IF NHH]** organisation's financial situation.

Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** Has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- [IF HH]** Living/**[IF NHH]** Operating comfortably
- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

Thinking about your **[IF HH]** household's/ **IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only

- A lot worse
- A bit worse
- Stay the same
- A bit better

A lot better
Prefer not to say
Don't know

IF NHH: How much are you currently paying for your water and sewerage services bill, each year?

[Open-ended answer] **DP PLEASE ADD TEXT BOX**
Don't know

[IF HH] Your current water and sewerage services bill is #insert from sample# **[all]** How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only
Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

Q13A **IF NHH:** At this point I need you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans Thames Water have.

Please could you go to LINK TBC

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the Thames Water area. An estimate is absolutely fine.

Interviewer note, do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page
Cannot proceed now **Open appointment box**

PN please add a 7 second time stamp

Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

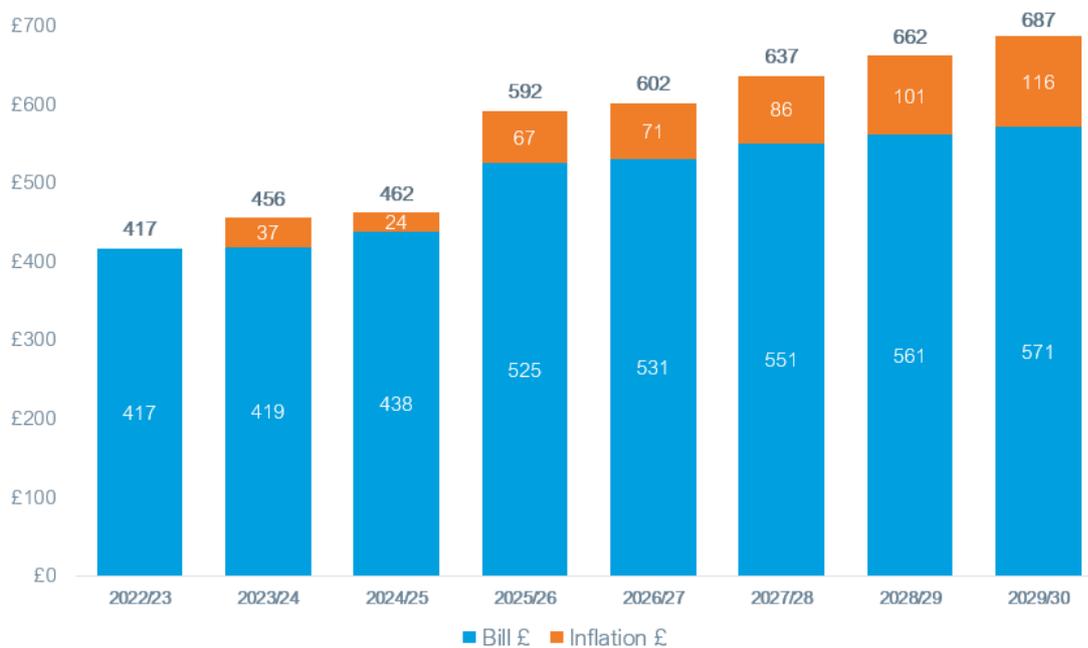
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



IF Social Tariff Customer (from sample): This bill profile is based on the financial support scheme you are currently on.

How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Very easy

Fairly easy

Neither easy nor difficult **HH ONLY GO TO Q15**

Fairly difficult **HH ONLY GO TO Q15**

Very difficult **HH ONLY GO TO Q15**

Don't know

[IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Shopping around more

Spending less on food shopping and essentials

Spending less on non-essentials

Cutting back on non-essential journeys in my vehicle

Eat out less

Using less fuel such as gas or electricity in my home

Using less water

Using my savings

Using credit more than usual, for example, credit cards, loans or overdrafts

Ask family and friends for financial support

Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**

Other, please specify **[OPEN RESPONSE] DP PLEASE ADD TEXT BOX**

Don't know

Acceptability

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of Water supply interruptions longer than 3 hours, against both their target and also the other water

Water supply interruptions lasting longer than 3 hours

Duration without water for more than 3 hours by minutes per property.

Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 11th of 17 companies on this measure

Company	Performance
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33



companies.

The following slide shows what Thames Water is proposing doing to improve things:

Water Supply Interruptions lasting longer than 3 hours

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

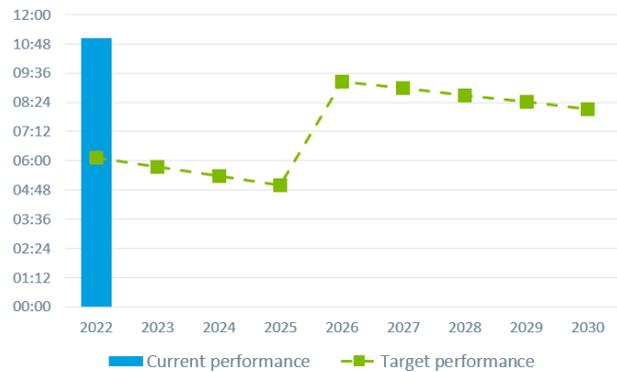
What we will do and benefits to customers

- Better manage pumps, valves and water pressure to reduce strain across the network
- Have more staff and equipment to fix problems

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the average time without water each year to 8 mins and 7 seconds per property by 2030.

Targets for Unplanned Interruptions

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



PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of Water quality contacts, against both their target and also the other water companies.

Appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 population.

Companies with the lowest numbers perform better

Thames Water has met its target for this metric last year

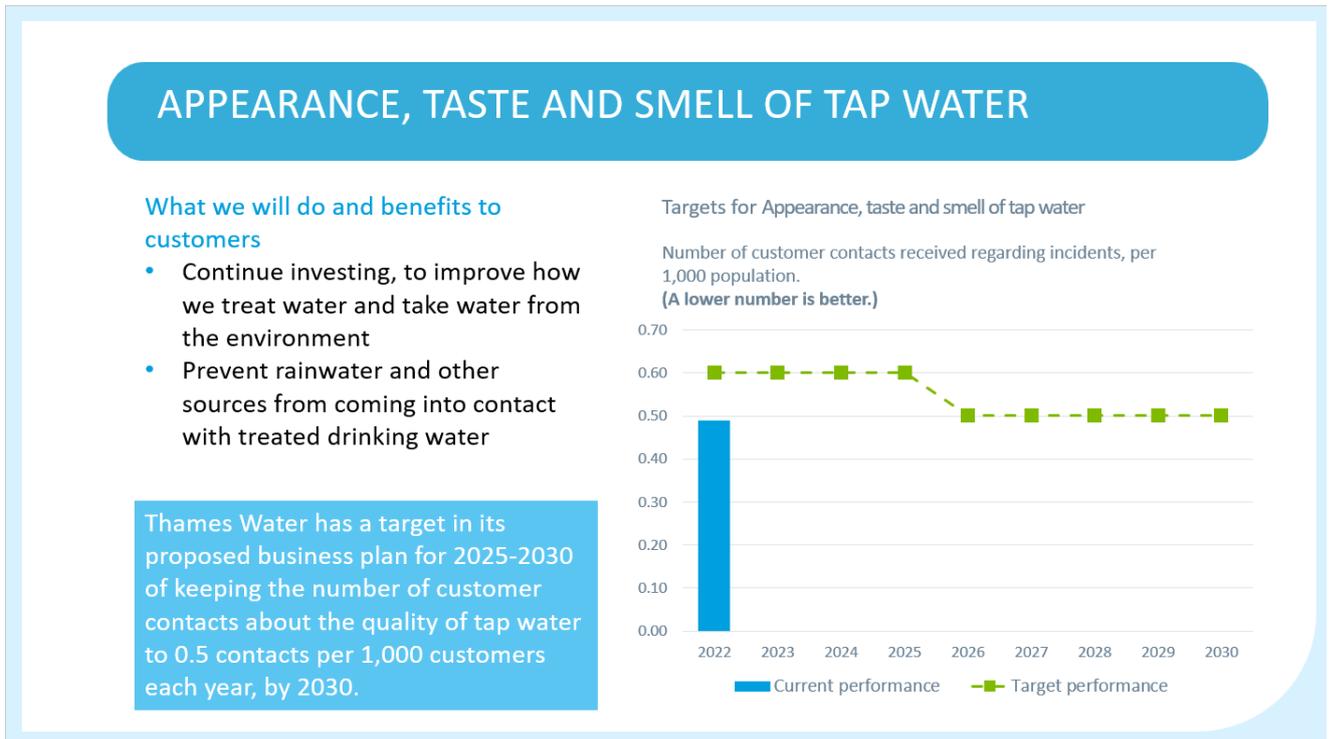
Thames Water is ranked 2nd of 17 companies on this measure

Company	Performance
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.1
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

Better performance

Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:



PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of reducing leaks, against both their target and also the other water companies.

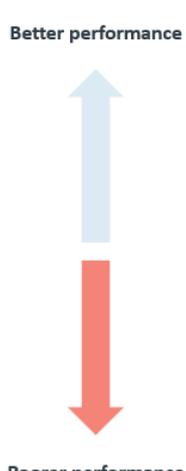
Reducing Leaks

Leakage, litres per property per day.

Companies with the lowest numbers perform better

Thames Water has met its target for this metric last year
Thames Water are ranked 18th of 19 companies on this measure

Company	Performance
Bristol	65.04
Northumbrian	76.4
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.3
Affinity	108.65
Severn Trent	110.35
South Staffs	113.45
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	146.09
Thames	151.51
Welsh Water	158.8



The following chart shows what Thames Water is proposing doing to improve things:

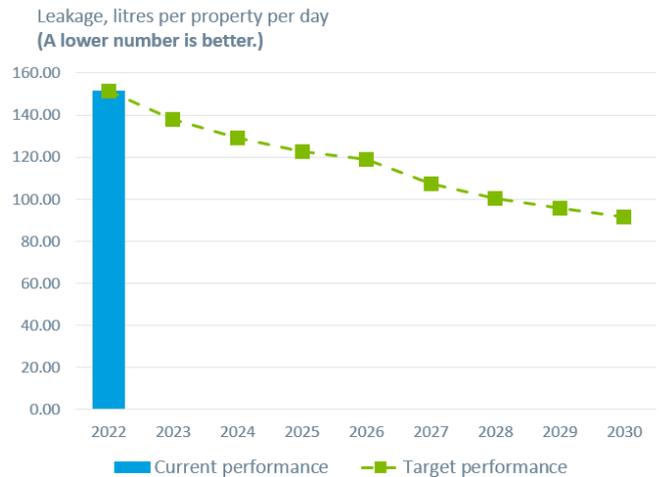
REDUCING LEAKS

What we will do and benefits to customers

- Continuing to find and fix leaks
- Use smart water meters to find and fix leaks
- Better manage pumps, valves and water pressure to reduce strain across the network

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the amount of water lost through leaking pipes to 91.70 litres per property per day, by 2030.

Targets for Reducing Leaks



Based on what you have just read, which of these parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Preventing issues with taste/smell/appearance of tap water
- Reducing Leaks
- Don't know/can't say

PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of sewage flooding of gardens and outbuildings, against both their target and also the other water companies.

Sewage flooding of gardens or outbuildings

Number of properties affected, per 10,000.

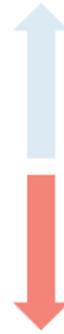
Companies with the lowest numbers perform better

Thames Water did not have a target for this metric last year

Thames Water is ranked 1st of 11 companies on this measure

Company	Performance
Thames	9.4
Severn Trent	10.8
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

Better performance



Poorer performance

The following slide shows what Thames Water is proposing doing to improve things:

SEWAGE FLOODING OF GARDENS OR OUTBUILDINGS

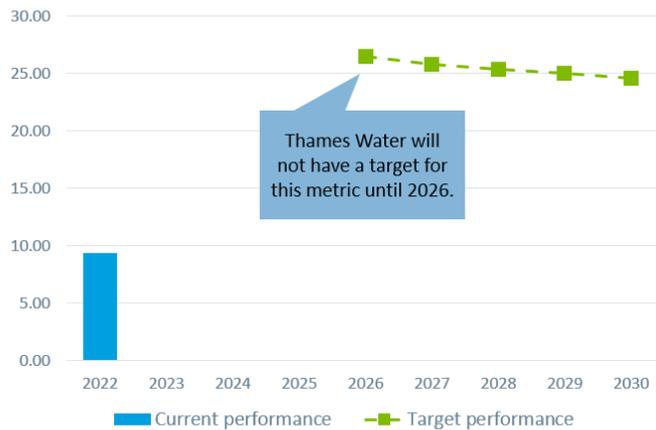
What we will do and benefits to customers

- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents.
- Continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number times sewage floods gardens and outside areas of properties to 24.58 per 10,000 properties per year, by 2030.

Targets for Sewage Flooding of gardens or outbuildings

Number of properties affected, per 10,000.
(A lower number is better.)



PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of sewage flooding of properties, against both their target and also the other water companies.

Sewage flooding of properties

Number of properties affected, per 10,000.

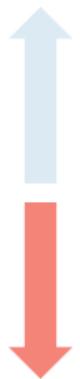
Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 11th of 11 companies on this measure

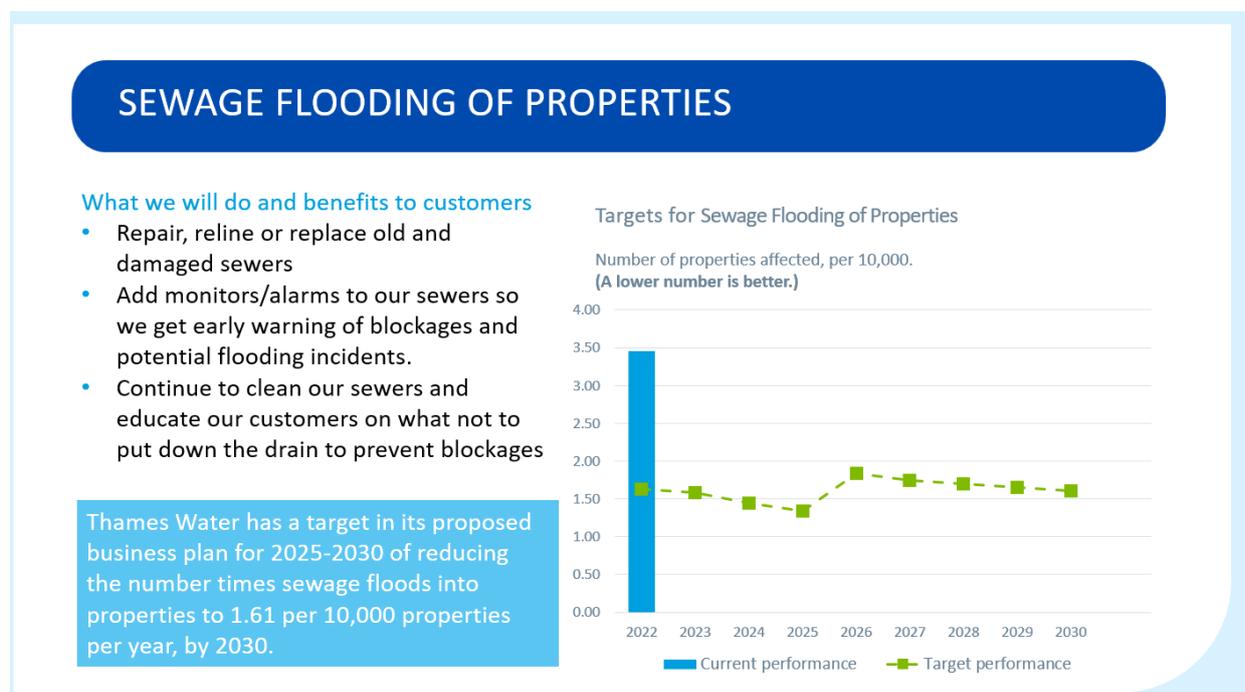
Company	Performance
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.97
Southern	3.04
Thames	3.46

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:



PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of pollution incidents, against both their target and also the other water companies.

Pollution of Rivers and Bathing Waters

Number of incidents per 10,000 km of sewer.

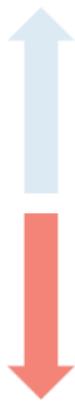
Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 6th of 11 companies on this measure

Company	Performance
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:

POLLUTION OF RIVERS AND BATHING WATERS

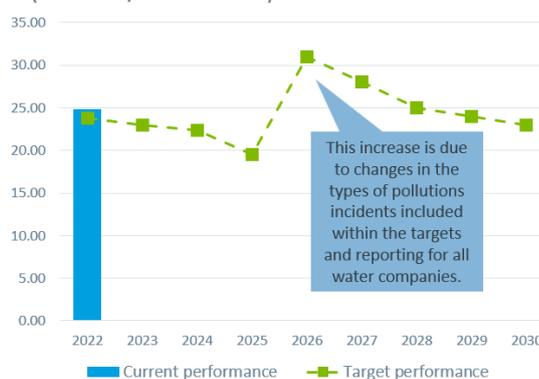
What we will do and benefits to customers

- Providing more storage on our sewer network
- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of potential pollution incidents.
- Clean sewers and educate customers

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number of pollution incidents per 10,000 km of sewer to 23 per year by 2030.

Targets for pollution Incidents

Number of incidents per 10,000km of sewer.
(A lower bar / number is better.)



Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Sewage Flooding of gardens and outbuildings
- Sewage flooding of properties
- Pollution Incidents
- Don't know/can't say

PN please add a 7 second time stamp

The following slide describes one of the additional components of Thames Water' business plan; Water Resources Management - water demand, helping customers save water

Water Resources Management: Water demand, helping customers save water

Making sure there is enough water available in the future
The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.
Water companies have a programme of work to meet these laws, which includes:

- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- When there is not enough water (drought), water companies can introduce temporary water restrictions, such as hosepipe bans. Severe droughts could mean rationing water for everyday activities or turning off supplies for certain periods during the day.

What we will do and benefits to customers

- Install around 1 million smart water meters to help homes and businesses keep track of their water use and save water.
- Visit 125,000 homes and 30,000 businesses to help them use water more efficiently.

Thames Water has a target in its proposed business plan for 2025-2030 to reduce the average amount of water each person uses to 134.6 litres a day.

The following slide describes one of the additional components of Thames Water' business plan; Water Resources Management: water supply, providing new sources of water

PN please add a 7 second time stamp

Water Resources Management: water supply, providing new sources of water

Making sure there is enough water available in the future

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

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

- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- When there is not enough water (drought), water companies can introduce temporary water restrictions, such as hosepipe bans. Severe droughts could mean rationing water for everyday activities or turning off supplies for certain periods during the day.

What we will do and benefits to customers

- Invest in new sources of water and modernise our infrastructure to protect supplies and reduce the risk of us running dry during prolonged periods of drought.
- Start work on planning several projects to provide new sources of water, such as transferring water from other water companies, recycling water and building a new reservoir.

Thames Water has a target in its proposed business plan for 2025-2030 to only need to introduce severe water use restrictions, such as standpipes in the street and water rationing, on average once every 100 years.

Based on what you have just read, which of these parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Water Resources Management: water demand, helping customers save water

Water Resources Management: water supply, providing new sources of water

Don't know/can't say

PN please add a 7 second time stamp

The following slide describes one of the additional components of Thames Water's business plan; Reducing pollution of rivers from sewage spills

Reducing pollution of rivers from sewage spills

Reducing sewage spills into rivers and improving river health

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

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

- Reducing pollution of seas and rivers by sewage overflows.

What we will do and benefits to customers

- Improve and increase the size of the sewer network to hold and treat more sewage, to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.

Thames Water has targets in its proposed business plan for 2025-2030 to reduce the average number of sewage spills into rivers from each overflow pipe to 17.4 a year.

PN please add a 7 second time stamp

The following slide describes one of the additional components of Thames Water' business plan; Improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works to prevent sewage overflowing into rivers

- As our population grows, increased amounts of wastewater (including rainwater) and the solid parts of sewage arrive at our sewage treatment works putting pressure on its treatment capacity.
- This can mean the treatment process becomes overloaded, resulting in lower quality treated wastewater being returned to rivers.
- This in turn can cause a fall in the river quality downstream of our sewage works impacting the health of the river.

What we will do and benefits to customers

- Upgrade existing sewage treatment works where increased housing developments are planned, to ensure sewage doesn't exceed the capacity of the treatment works and high standards of treatment can be maintained.
- This would involve an expansion of the treatment facilities with new equipment being built and installed.

Thames Water has a target in its proposed business plan for 2025-2030 to upgrade or expand 13 sewage treatment works between 2025 and 2030, specifically to cater for increased housing developments in these areas.

Based on what you have just read, which of these parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Reducing pollution of rivers from sewage spills
Improving the capacity of sewage treatment works
Don't know/can't say

Based on everything you have seen and read about Thames Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Completely acceptable **GO TO 0**
Acceptable **GO TO 0**
Unacceptable **GO TO 0**
Completely unacceptable **GO TO 0**
Don't know/can't say

IF 030=3 or 4 What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

The bill increases are too expensive
Company profits are too high
Companies should pay for service improvements
I expect better service improvements
The plan is poor value for money
Compared to energy prices it is more expensive
I am dissatisfied with current services
The plans don't focus on the right services
I won't be able to afford this
I don't trust them to make these service improvements
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Don't know/ can't say

IF 030=1 OR 2 What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

The plan is good value for money
The plan is affordable
Compared to energy prices it's cheaper
Their plans seem to focus on the right services
The company provides a good service now
I support what they are trying to do in the long term
The change to my bill is small
I trust them to do what's best for customers
I have been dissatisfied with the service recently but am pleased that they are making improvements
Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
Don't know/ can't say

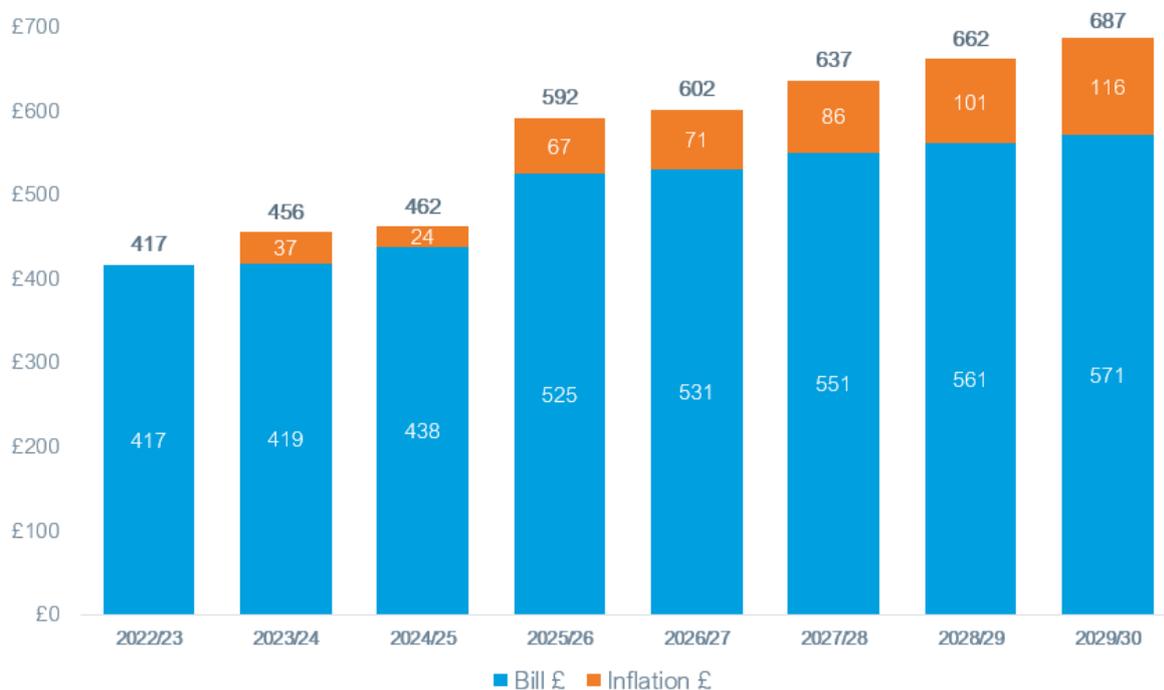
Long term investment by Thames Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

Please select one answer only

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

Q35B PN please add a 7 second time stamp

At the start of this interview, you were shown the following prediction for bill increases, and you said it would be #insert answer from q14# to afford these increases.



Knowing what you know now about how that money is intended to be used, how easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult

Very difficult
Don't know

HH ONLY: Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Female
Male
I identify in another way
Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed
Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
Housewife/Househusband
Unemployed
Retired **GO TO 037**
Student
Prefer not to say

IF Q36 = RETIRED ASK Does the main income earner have a state pension, a private pension or both?

State only
Private only
Both
Prefer not to say

IF Q37= PRIVATE OR BOTH ASK: How would you describe the main income earner's occupation type before retirement?

Higher managerial/ professional/ administrative (e.g. Established doctor, Solicitor, Board Director in a large **High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed
Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
Housewife/Househusband
Unemployed
Student
None of these
Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion. **MULTICODE**

Please select all that apply

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

Please select one answer only

WHITE

English, Welsh, Scottish, Northern Irish or British

Irish

Gypsy or Irish Traveller

Any other White background

MIXED

White and Black Caribbean

White and Black African

White and Asian

Any other Mixed background

ASIAN OR ASIAN BRITISH

Indian

Pakistani

Bangladeshi

Chinese

Any other Asian background

BLACK OR BLACK BRITISH

Caribbean

African

Any other Black background

OTHER ETHNIC GROUP

Arab

Any other ethnic group

Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year
From £200 to £299 a week/From £10,400 to £15,599 a year
From £300 to £499 a week/From £15,600 to £25,999 a year
From £500 to £699 a week/From £26,000 to £36,399 a year
From £700 to £999 a week/From £36,400 to £51,999 a year
From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
£2,000 and above a week/£104,000 and above a Year
Don't know
Prefer not to say
GO TO 0

NHH only: Demographic Questions

How does your organisation mainly use water at its premises? **MULTICODE**

Please select all that apply

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)

For the supply of services your organisation provides (eg cleaning services etc)

For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)

For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)

None of the above

Don't Know

How many sites in the UK does your organisation operate from?

1

2

3

4

5-10

11-50

51-250

250

Prefer not to say

How many employees does your organisation have in the UK?

0 (sole trader)

1 to 9 employees (micro)

10 to 49 employees (small)

50 to 249 employees (medium)

250+ employees (large)

Prefer not to say

Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing

Mining and quarrying

Energy or water service & supply

Manufacturing

Construction

Wholesale and retail trade (including motor vehicles repair)

Transport and storage

Hotels & catering

IT and Communication

Finance and insurance activities

Real estate activities
Professional, scientific and technical activities
Administrative and Support Service Activities
Public administration and defence
Education
Human health and social work activities
Arts, entertainment and recreation
Other service activities
Other (please specify)
Prefer not to say

Classification Questions

IF NON PANEL: We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS
M&S Voucher by email COLLECT EMAIL ADDRESS
One4All by email COLLECT EMAIL ADDRESS
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes
No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

CATI NHH ONLY Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes
No

QEND [IF HH] Thames Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here:

<https://www.thameswater.co.uk/help/account-and-billing/financial-support>

Questionnaire (Online version – Affinity Thames Supply area)



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this on-line survey which is being conducted by Accent, an independent research agency. This survey is designed to help Thames Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

NOT PANEL: Anyone completing the survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials type Accent in the search box at: <https://www.mrs.org.uk/researchbuyersguide>.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

IF MOBILE DEVICE SHOW: This survey is best undertaken on a tablet or a PC. If you do use a smartphone you can switch between desktop mode and mobile mode at any time by clicking the button at the bottom of the screen.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **THANK AND CLOSE**

IF HH: Do you or any of your close family work in market research or for a water company?

Yes **THANK & CLOSE**

No

IF HH: How old are you?

OPEN TEXT RESPONSE BOX

Prefer not to say **THANK AND CLOSE**

Under 18 **THANK AND CLOSE**

PN: PLEASE RECODE IN THE FOLLOWING AGE BANDS

18-24

25-34

35-44

45-54

55-64

65-74

75+

IF HH: Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Affinity Water is your water supplier, and Thames Water is responsible for your sewerage services. Does this sound right?

Yes **GO TO MAIN QUESTIONNAIRE**

No **THANK AND CLOSE**

Don't know **GO TO MAIN QUESTIONNAIRE**

IF NHH: Are you solely or jointly responsible as the decision maker for your organisation's water and sewerage service at any of its premises?

Yes

No **THANK AND CLOSE**

IF NHH: Is Affinity Water responsible for the water services, and Thames Water for the sewage services at your organisation?

Yes

No **THANK AND CLOSE**

Don't know **THANK AND CLOSE**

Q8A **IF NHH:** When answering this questionnaire, we would like you to think only about sites your organisation might have that are in the Thames Water area. Is that OK?

Yes

No **THANK AND CLOSE**

Main Questionnaire

Thank you, I can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

For convenience you can stop and return to complete the questionnaire as many times as you wish, although once submitted you will not be able to enter again.

Affordability

We are now going to ask you some questions about your **[IF HH]** household's/**[IF NHH]** organisation's financial situation.

Thinking about your finances over the last year, how often, if at all, **[IF HH]** have you struggled to pay at least one of your household bills? **[IF NHH]** Has your organisation struggled to pay at least one of its bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say **[IF HH]** you are/**[IF NHH]** your organisation is managing financially now? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- [IF HH]** Living/**[IF NHH]** Operating comfortably
- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

Thinking about your **[IF HH]** household's/ **IF NHH]** your organisation's financial situation over the next few years up to 2030, do you expect it to get: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

- Please select one answer only*
- A lot worse
 - A bit worse
 - Stay the same
 - A bit better
 - A lot better

Prefer not to say
Don't know

IF NHH: How much are you currently paying for your water and sewerage services bill, each year?

[Open-ended answer] **DP PLEASE ADD TEXT BOX**
Don't know

[IF HH] Your current water and sewerage services bill is #insert from sample# **[all]** How easy or difficult is it for **[IF HH]** you **[IF NHH]** your company/organisation to afford to pay your current water and sewerage bill: **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR PREFER NOT TO SAY**

Please select one answer only

Very easy
Fairly easy
Neither easy nor difficult
Fairly difficult
Very difficult
Don't know

Q13A **IF NHH:** At this point I need you to look at an individualised graph, mapping out what future water bills may look like for your organisation under the plans Thames Water have.

Please could you go to LINK TBC

You should see a thank you note, then on the next page somewhere to put your annual water bill amount into. Please enter the bill for all sites your company operates in the Thames Water area. An estimate is absolutely fine.

Interviewer note, do not proceed until they have gone to the website and put in their bill amount. Only then can you proceed. You must not proceed without them seeing these materials.

Looking at web page
Cannot proceed now **Open appointment box**

PN please add a 7 second time stamp

Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

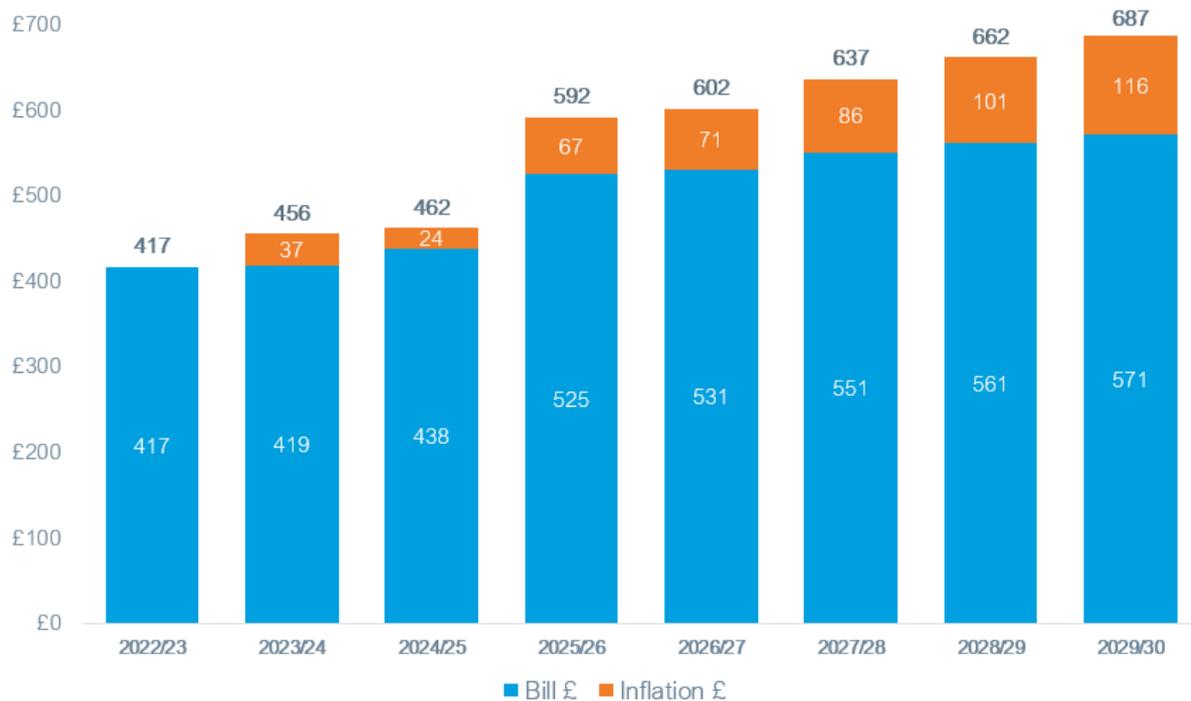
The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The following chart shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)



(Placeholder – this graph will be tailored according to bill amounts)

IF Social Tariff Customer (from sample): This bill profile is based on the financial support scheme you are currently on.

How easy or difficult do you think it would be for [IF HH] you [IF NHH] your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Very easy

Fairly easy

Neither easy nor difficult **HH ONLY GO TO Q15**

Fairly difficult **HH ONLY GO TO Q15**

Very difficult **HH ONLY GO TO Q15**

Don't know

[IF HH ONLY] IF 0= 3,4,5 Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030 **MULTICODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Shopping around more

Spending less on food shopping and essentials

Spending less on non-essentials

Cutting back on non-essential journeys in my vehicle

Eat out less

Using less fuel such as gas or electricity in my home

Using less water

Using my savings

Using credit more than usual, for example, credit cards, loans or overdrafts

Ask family and friends for financial support

Other, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Other, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**

Don't know

Acceptability

We are now going to ask you some questions about your views on your water company's business plan. Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030..

PN please add a 7 second time stamp

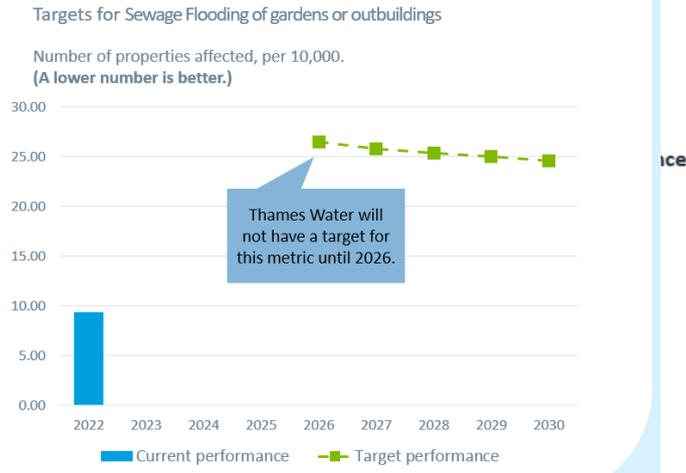
The following chart shows how Thames Water are performing in the area of sewage flooding of gardens and outbuildings, against both their target and also the other water companies.

SEWAGE FLOODING OF GARDENS OR OUTBUILDINGS

What we will do and benefits to customers

- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents.
- Continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number times sewage floods gardens and outside areas of properties to 24.58 per 10,000 properties per year, by 2030.



Southern	25.88
Welsh Water	26.27
Northumbrian	26.64

Poorer performance

The following slide shows what Thames Water is proposing doing to improve things:

PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of sewage flooding of properties, against both their target and also the other water companies.

Sewage flooding of properties

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 11th of 11 companies on this measure

Company	Performance
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.97
Southern	3.04
Thames	3.46

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:

SEWAGE FLOODING OF PROPERTIES

What we will do and benefits to customers

- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents.
- Continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number times sewage floods into properties to 1.61 per 10,000 properties per year, by 2030.

Targets for Sewage Flooding of Properties

Number of properties affected, per 10,000.
(A lower number is better.)



PN please add a 7 second time stamp

The following chart shows how Thames Water are performing in the area of pollution incidents, against both their target and also the other water companies.

Pollution of Rivers and Bathing Waters

Number of incidents per 10,000 km of sewer.

Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 6th of 11 companies on this measure

Company	Performance
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:

POLLUTION OF RIVERS AND BATHING WATERS

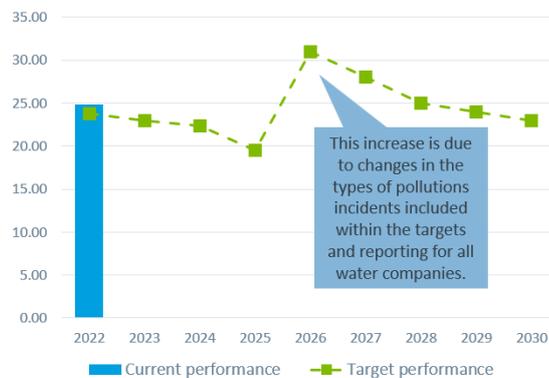
What we will do and benefits to customers

- Providing more storage on our sewer network
- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of potential pollution incidents.
- Clean sewers and educate customers

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number of pollution incidents per 10,000 km of sewer to 23 per year by 2030.

Targets for pollution Incidents

Number of incidents per 10,000km of sewer.
(A lower bar / number is better.)



Based on what you have just read, which of these three parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

- Sewage flooding of gardens and outbuildings
- Sewage flooding of properties
- Pollution Incidents
- Don't know/can't say

PN please add a 7 second time stamp

The following slide describes one of the additional components of Thames Water' business plan; Reducing pollution of rivers from sewage spills

Reducing pollution of rivers from sewage spills

Reducing sewage spills into rivers and improving river health
The services that water companies provide must comply with environmental laws in England/Wales, as well as UK/Welsh Government policy.

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

- Reducing pollution of seas and rivers by sewage overflows.

What we will do and benefits to customers

- Improve and increase the size of the sewer network to hold and treat more sewage, to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.

Thames Water has targets in its proposed business plan for 2025-2030 to reduce the average number of sewage spills into rivers from each overflow pipe to 17.4 a year.

PN please add a 7 second time stamp

The following slide describes one of the additional components of Thames Water' business plan; improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works to prevent sewage overflowing into rivers

- As our population grows, increased amounts of wastewater (including rainwater) and the solid parts of sewage arrive at our sewage treatment works putting pressure on its treatment capacity.
- This can mean the treatment process becomes overloaded, resulting in lower quality treated wastewater being returned to rivers.
- This in turn can cause a fall in the river quality downstream of our sewage works impacting the health of the river.

What we will do and benefits to customers

- Upgrade existing sewage treatment works where increased housing developments are planned, to ensure sewage doesn't exceed the capacity of the treatment works and high standards of treatment can be maintained.
- This would involve an expansion of the treatment facilities with new equipment being built and installed.

Thames Water has a target in its proposed business plan for 2025-2030 to upgrade or expand 13 sewage treatment works between 2025 and 2030, specifically to cater for increased housing developments in these areas.

Based on what you have just read, which of these parts of the business plan is the most important to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Reducing pollution of rivers from sewage spills
improving the capacity of sewage treatment works
Don't know/can't say

Based on everything you have seen and read about Thames Water's proposed business plan, how acceptable or unacceptable is it to you? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

Please select one answer only

Completely acceptable **GO TO 0**
Acceptable **GO TO 0**
Unacceptable **GO TO 0**
Completely unacceptable **GO TO 0**
Don't know/can't say

IF 030=3 or 4 What are the two main reasons that you feel the proposals for your water services are unacceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

- The bill increases are too expensive
 - Company profits are too high
 - Companies should pay for service improvements
 - I expect better service improvements
 - The plan is poor value for money
 - Compared to energy prices it is more expensive
 - I am dissatisfied with current services
 - The plans don't focus on the right services
 - I won't be able to afford this
 - I don't trust them to make these service improvements
 - Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
 - Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
 - Don't know/ can't say
-

IF 030=1 OR 2 What are the two main reasons that you feel the proposals for your water supply are acceptable? **MAXIMUM 2 ANSWERS, RANDOMISE**

Please choose up to two answers only

- The plan is good value for money
 - The plan is affordable
 - Compared to energy prices it's cheaper
 - Their plans seem to focus on the right services
 - The company provides a good service now
 - I support what they are trying to do in the long term
 - The change to my bill is small
 - I trust them to do what's best for customers
 - I have been dissatisfied with the service recently but am pleased that they are making improvements
 - Other 1, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
 - Other 2, please specify [OPEN RESPONSE] **DP PLEASE ADD TEXT BOX**
 - Don't know/ can't say
-

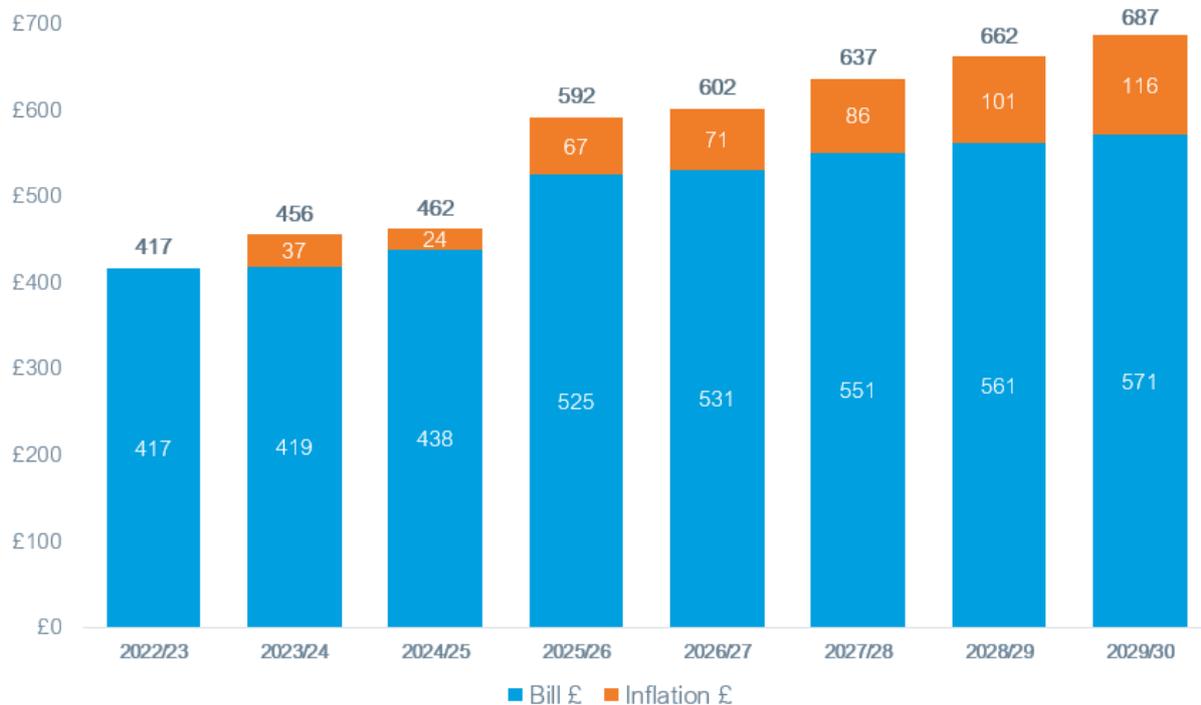
Long term investment by Thames Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer? **SINGLECODE**

Please select one answer only

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

PN please add a 7 second time stamp
This is the same bill calculator as at Q14

Q35B At the start of this interview, you were shown the following prediction for bill increases, and you said it would be #insert answer from q14# to afford these increases.



Knowing what you know now about how that money is intended to be used, how easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these water/sewerage bills? **SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW**

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

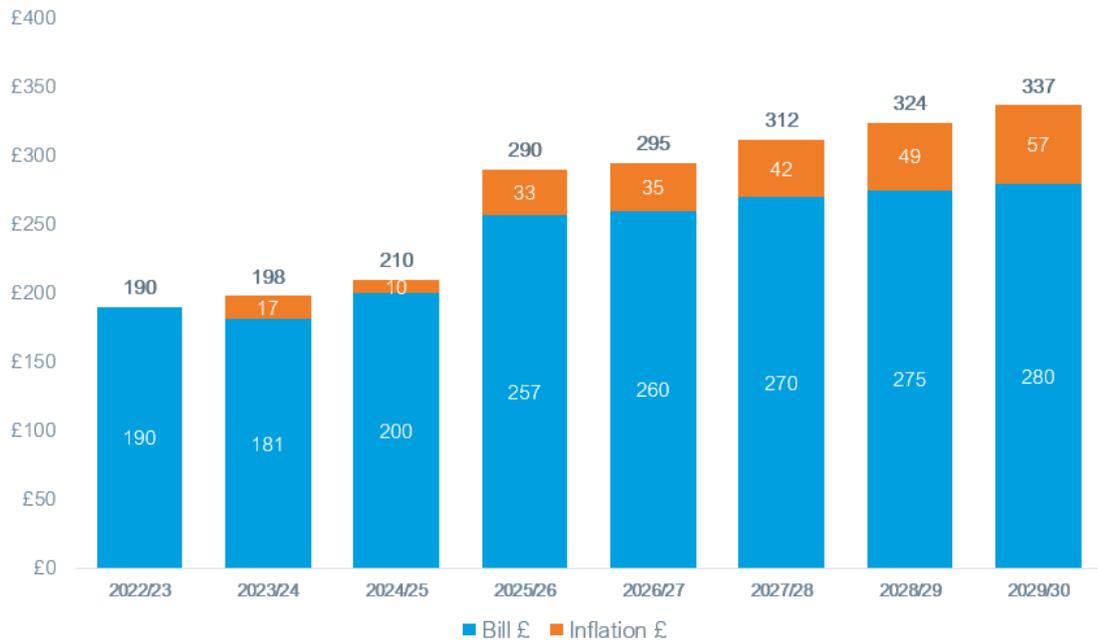
PN please add a 7 second time stamp

THIS QUESTION IS ONLY SHOWN IN THIS AFFINITY THAMES (THAMES VERSION) SURVEY

Q35B2 We just showed you a graph that displayed how your combined water and waste bill might change over the next 7 years. Thames Water only supply wastewater services in your area though, and so that graph included costs for water services that Thames do not provide and cannot control.

The following graph shows **just the waste component of your bill** (that is, the part provided by Thames Water. How easy or difficult do you think it would be for **[IF HH]** you **[IF NHH]** your company/organisation to afford these waste only bills?

Please bear in mind that your water bills are likely to increase over the same period as previously shown.



SINGLECODE, RANDOMISE WITH REVERSE ORDER EXCEPT FOR DON'T KNOW

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

ALL SKIP

HH ONLY: Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

- Female
- Male
- I identify in another way
- Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver

Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
Housewife/Househusband
Unemployed
Retired **GO TO 037**
Student
Prefer not to say

IF Q36 =RETIRED ASK Does the main income earner have a state pension, a private pension or both?

State only
Private only
Both
Prefer not to say

IF Q37= PRIVATE OR BOTH ASK: How would you describe the main income earner's occupation type before retirement?

Higher managerial/ professional/ administrative (e.g. Established doctor, Solicitor, Board Director in a large **High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
Intermediate managerial, administrative or professional e.g. teacher, manager, accountant
Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed
Skilled manual worker e.g. mechanic, plumber, electrician, lorry driver, train driver
Semi-skilled or unskilled manual worker e.g. waiter, factory worker, receptionist, labourer
Housewife/Househusband
Unemployed
Student
None of these
Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be destroyed within 12 months of project completion. **MULTICODE**

Please select all that apply

I or another member of my household is disabled or suffer(s) from a debilitating illness **CODED AS MEDICAL VULNERABILITY**

I or another member of my household have/has a learning difficulty **CODED AS MEDICAL VULNERABILITY**

I or another member of my household relies on water for medical reasons **CODED AS MEDICAL VULNERABILITY**

I or another member of my household is visually impaired (ie struggles to read even with glasses) **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household am/is over the age of 75 years old **CODED AS LIFE STAGE VULNERABILITY**

I or another member of my household speaks English as a second language **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is deaf or hard of hearing **CODED AS COMMUNICATIONS VULNERABILITY**

I or another member of my household is a new parent **CODED AS LIFE STAGE VULNERABILITY**

None of these apply to me

Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background **SINGLECODE**

Please select one answer only

WHITE

English, Welsh, Scottish, Northern Irish or British

Irish
Gypsy or Irish Traveller
Any other White background

MIXED

White and Black Caribbean
White and Black African
White and Asian
Any other Mixed background

ASIAN OR ASIAN BRITISH

Indian
Pakistani
Bangladeshi
Chinese
Any other Asian background

BLACK OR BLACK BRITISH

Caribbean
African
Any other Black background

OTHER ETHNIC GROUP

Arab
Any other ethnic group
Prefer not to say

Which of the following bands does your household income fall into from all sources before tax and other deductions? **SINGLECODE**

Up to £199 a week/Up to £10,399 a year
From £200 to £299 a week/From £10,400 to £15,599 a year
From £300 to £499 a week/From £15,600 to £25,999 a year
From £500 to £699 a week/From £26,000 to £36,399 a year
From £700 to £999 a week/From £36,400 to £51,999 a year
From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
£2,000 and above a week/£104,000 and above a Year
Don't know
Prefer not to say
GO TO 0

NHH only: Demographic Questions

How does your organisation mainly use water at its premises? **MULTICODE**

Please select all that apply

For the manufacturing process which is essential to the running of your organisation (eg to power machinery, agricultural production etc)
For the supply of services your organisation provides (eg cleaning services etc)
For an ingredient or part of the product or service your organisation provides (eg food or drink, chemical, cosmetics manufacturer etc)
For normal domestic use for your organisation's customers and employees (eg customer toilets, supply of drinking water)
None of the above
Don't Know

How many sites in the UK does your organisation operate from?

2
3
4
5-10
11-50
51-250
250
Prefer not to say

How many employees does your organisation have in the UK?

0 (sole trader)
1 to 9 employees (micro)
10 to 49 employees (small)
50 to 249 employees (medium)
250+ employees (large)
Prefer not to say

Which of the following best defines the core activity of your organisation?

Agriculture, forestry and fishing
Mining and quarrying
Energy or water service & supply
Manufacturing
Construction
Wholesale and retail trade (including motor vehicles repair)
Transport and storage
Hotels & catering
IT and Communication
Finance and insurance activities
Real estate activities
Professional, scientific and technical activities
Administrative and Support Service Activities
Public administration and defence
Education
Human health and social work activities
Arts, entertainment and recreation
Other service activities
Other (please specify)
Prefer not to say

Classification Questions

IF NON PANEL: We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email.
Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

Amazon voucher by email COLLECT EMAIL ADDRESS
M&S Voucher by email COLLECT EMAIL ADDRESS
One4All by email COLLECT EMAIL ADDRESS
Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

CATI NHH ONLY Interviewer Confirmation

I confirm that this interview was conducted under the terms of the MRS code of conduct and is completely confidential

Yes

No

QEND [IF HH] Thames Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here:

<https://www.thameswater.co.uk/help/account-and-billing/financial-support>

Questionnaire (Thames dual supply - Paper version)



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this survey which is being conducted by Accent, an independent research agency. This survey is designed to help Thames Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **12th September 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

When completing the survey please start from Question 1 (Q1) in the 'Scoping questions' section.

If at any point in the 'Scoping questions' section you find **"Thank you for your time, it is not possible for your survey responses to be included – please stop here."** written next to the answer you have selected, this means you are not eligible to take part in this survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the questions in the 'Scoping questions' section without that message appearing next to any of your answers please go to the "Main questionnaire" and follow the questionnaire order.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Do you or any of your close family work in market research or for a water company?

Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

No

How old are you? Please enter your age.

Please enter your age on the line below

Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Thames Water is your water supplier, and is responsible for your sewerage services.

Does this sound right?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know

Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

Main Questionnaire

Affordability

We are now going to ask you some questions about your household's financial situation.

Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

Please select one answer only

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say you are managing financially now?

Please select one answer only

- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

Please select one answer only

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

How easy or difficult is it for you to afford to pay your current water and sewerage bill:

Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

□ Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years. The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



How easy or difficult do you think it would be for you to afford these water/sewerage bills?

Please select one answer only

- Very easy **Please skip question 12**
- Fairly easy **Please skip question 12**
- Neither easy nor difficult **Please go to Question 12**
- Fairly difficult **Please go to Question 12**
- Very difficult **Please go to Question 12**
- Don't know

Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)

Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

Please select all that apply

- Shopping around more
 - Spending less on food shopping and essentials
 - Spending less on non-essentials
 - Cutting back on non-essential journeys in my vehicle
 - Eat out less
 - Using less fuel such as gas or electricity in my home
 - Using less water
 - Using my savings
 - Using credit more than usual, for example, credit cards, loans or overdrafts
 - Ask family and friends for financial support
 - Other, please specify:
-
- Don't know

Acceptability

We are now going to ask you some questions about your views on your water company's business plan.

Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

The following chart shows how Thames Water are performing in the area of Water supply interruptions longer than 3 hours, against both their target and also the

Water supply interruptions lasting longer than 3 hours

Duration without water for more than 3 hours by minutes per property.

Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 11th of 17 companies on this measure

Company	Performance
Portsmouth	00:02:21
Bristol	00:02:31
SES Water	00:02:58
South Staffs & Cambridge	00:03:15
Affinity	00:03:43
Wessex	00:04:12
United Utilities	00:07:58
Southern	00:09:22
Anglian	00:09:48
Yorkshire	00:10:38
Thames	00:11:03
Northumbrian	00:11:45
Severn Trent	00:12:39
South West	00:13:40
Welsh Water	00:16:12
Hafren Dyfrdwy	00:37:28
South East	01:12:33

Better performance




Poorer performance

other water companies.

The following slide shows what Thames Water is proposing doing to improve things:

Water Supply Interruptions lasting longer than 3 hours

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

What we will do and benefits to customers

- Better manage pumps, valves and water pressure to reduce strain across the network
- Have more staff and equipment to fix problems

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the average time without water each year to 8 mins and 7 seconds per property by 2030.

Targets for Unplanned Interruptions

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



Year	Current Performance (min:sec)	Target Performance (min:sec)
2022	00:11:03	00:06:00
2023	-	00:05:30
2024	-	00:05:00
2025	-	00:04:48
2026	-	00:08:36
2027	-	00:08:12
2028	-	00:07:54
2029	-	00:07:42
2030	-	00:07:28

The following chart shows how Thames Water are performing in the area of Water quality contacts, against both their target and also the other water companies.

Appearance, taste and smell of tap water

Number of customer contacts received regarding incidents, per 1,000 population.
Companies with the lowest numbers perform better

Thames Water has met its target for this metric last year

Thames Water is ranked 2nd of 17 companies on this measure

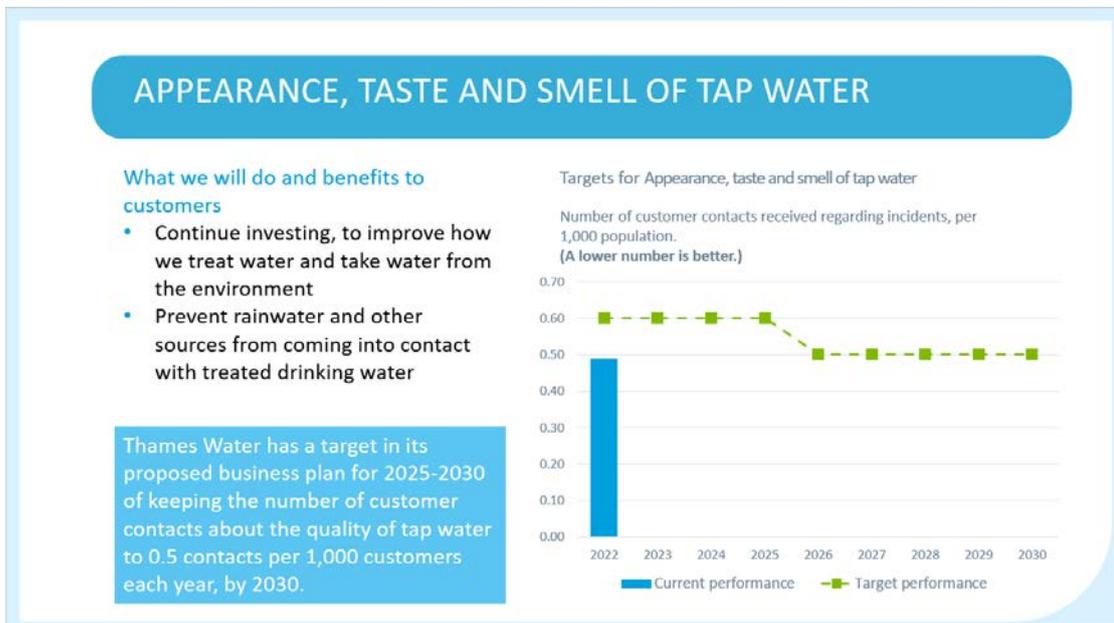
Company	Performance
Portsmouth	0.41
Thames	0.49
SES Water	0.58
Affinity	0.73
South Staffs & Cambridge	0.76
Severn Trent	0.93
Northumbrian	0.97
Anglian	1.03
Yorkshire	1.09
Southern	1.1
Wessex	1.17
South East	1.34
Bristol	1.38
South West	1.55
Hafren Dyfrdwy	1.71
United Utilities	1.79
Welsh Water	2.38

Better performance

Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:

The following chart shows how Thames Water are performing in the area of reducing leaks, against both their target and also the other water companies.



Reducing Leaks

Leakage, litres per property per day.

Companies with the lowest numbers perform better

Thames Water has met its target for this metric last year
Thames Water are ranked 18th of 19 companies on this measure

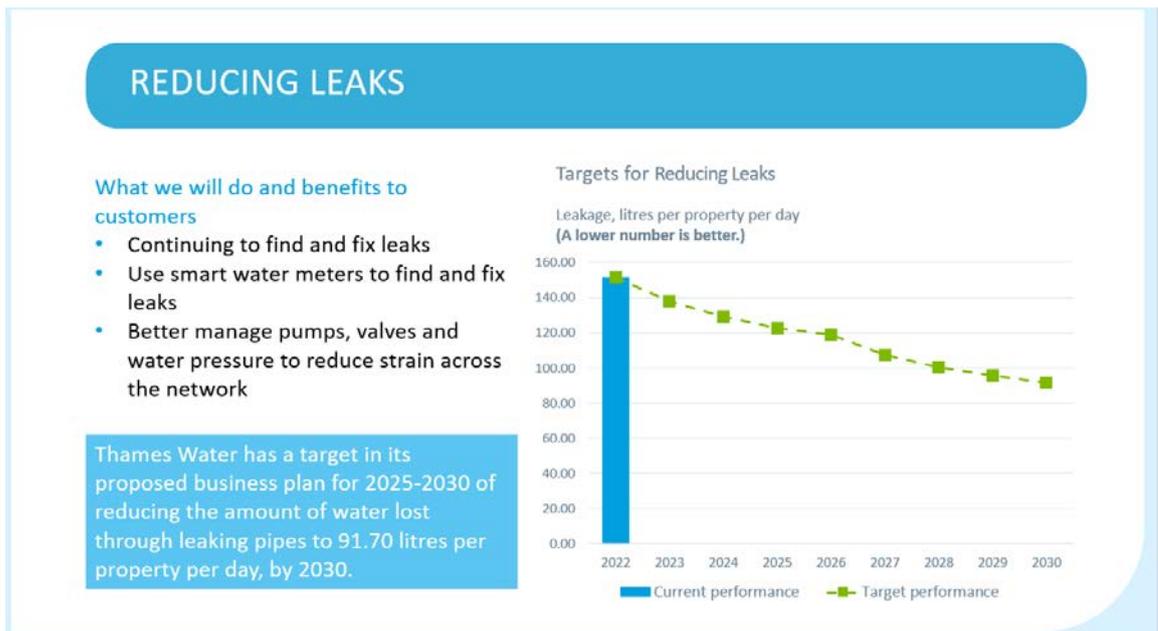
Company	Performance
Bristol	65.04
Northumbrian	76.4
Portsmouth	77.02
SES Water	78.68
Anglian	80.18
Southern	83.17
South East	87.63
Cambridge	90.67
Wessex	103.29
South West	107.71
Northumbrian	108.3
Affinity	108.65
Severn Trent	110.35
South Staffs	113.45
Yorkshire	122.91
United Utilities	124.21
Hafren Dyfrdwy	146.09
Thames	151.51
Welsh Water	158.8

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:



Based on what you have just read, which of these parts of the business plan is the most important to you?

Please select one answer only

- Reducing the duration of water interruptions of longer than 3 hours
- Preventing issues with taste/smell/appearance of tap water
- Reducing Leaks
- Don't know/can't say

The following chart shows how Thames Water are performing in the area of sewage

Sewage flooding of gardens or outbuildings

Number of properties affected, per 10,000.

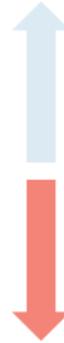
Companies with the lowest numbers perform better

Thames Water did not have a target for this metric last year

Thames Water is ranked 1st of 11 companies on this measure

Company	Performance
Thames	9.4
Severn Trent	10.8
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

Better performance



Poorer performance

flooding of gardens and outbuildings, against both their target and also the other water companies.

The following slide shows what Thames Water is proposing doing to improve things:

SEWAGE FLOODING OF GARDENS OR OUTBUILDINGS

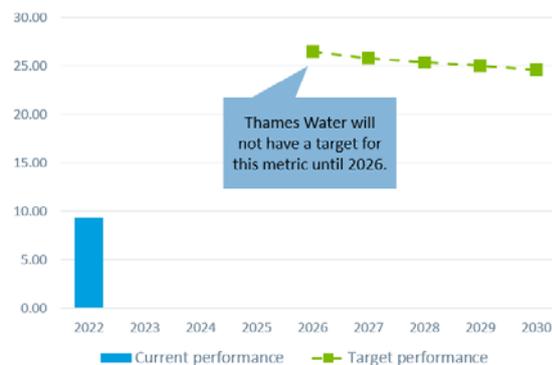
What we will do and benefits to customers

- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents.
- Continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number times sewage floods gardens and outside areas of properties to 24.58 per 10,000 properties per year, by 2030.

Targets for Sewage Flooding of gardens or outbuildings

Number of properties affected, per 10,000.
(A lower number is better.)



The following chart shows how Thames Water are performing in the area of sewage flooding of properties, against both their target and also the other water companies.

Sewage flooding of properties

Number of properties affected, per 10,000.

Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 11th of 11 companies on this measure

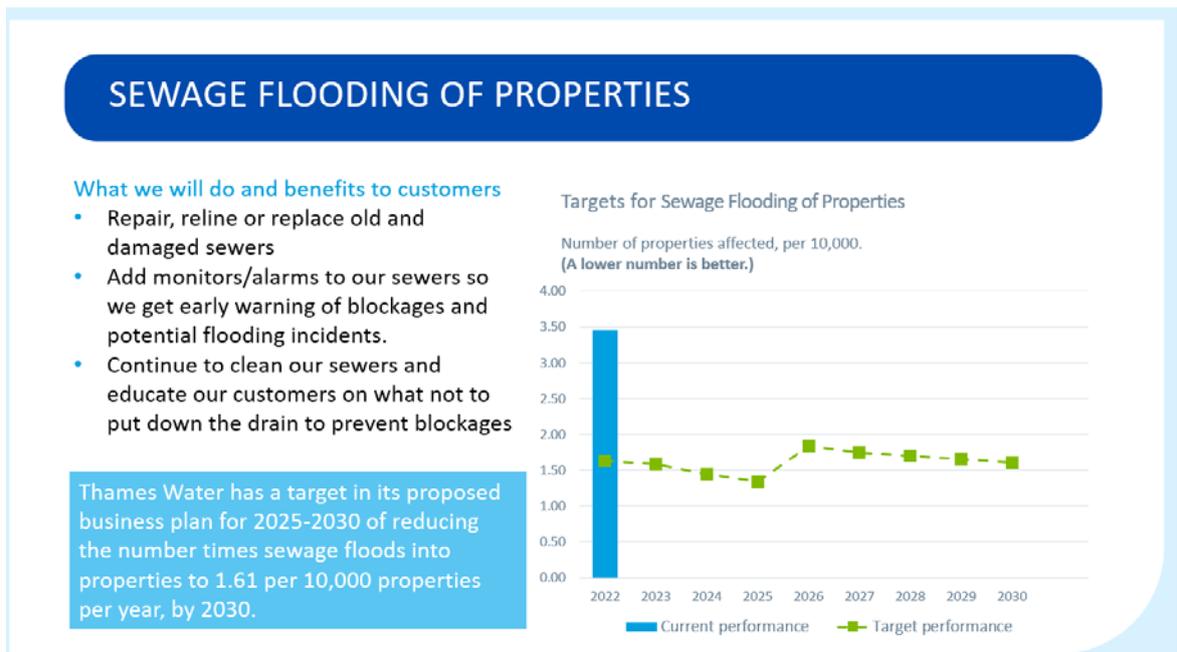
Company	Performance
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.97
Southern	3.04
Thames	3.46

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:



The following chart shows how Thames Water are performing in the area of pollution incidents, against both their target and also the other water companies.

Pollution of Rivers and Bathing Waters

Number of incidents per 10,000 km of sewer.

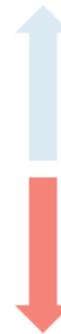
Companies with the lowest numbers perform better

Thames Water **has not met its target for this metric last year**

Thames Water is ranked **6th of 11 companies on this measure**

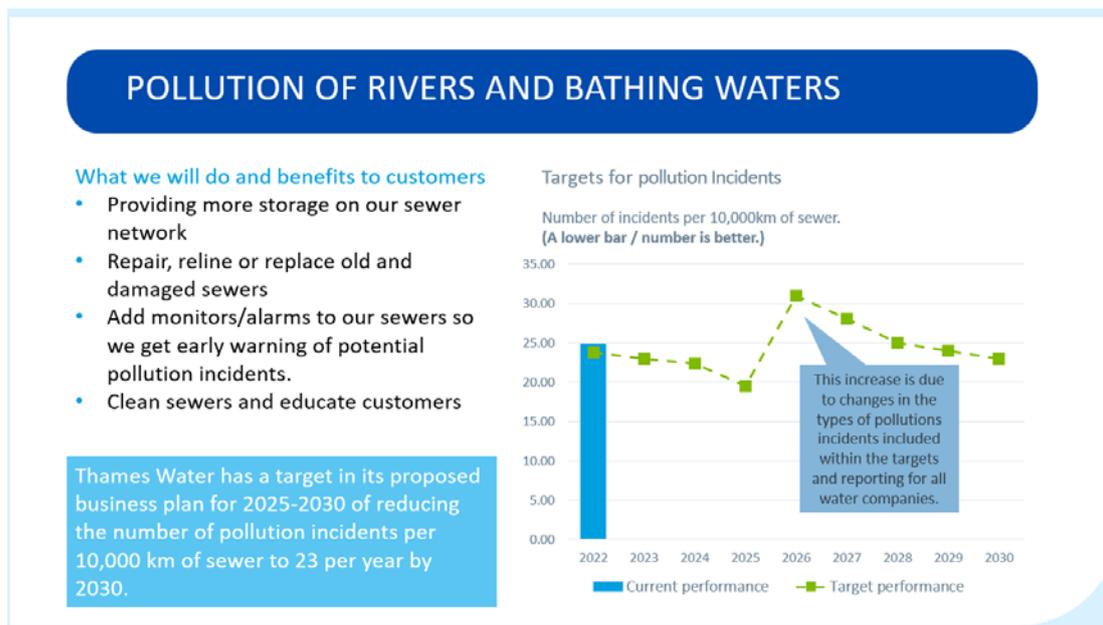
Company	Performance
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:



Based on what you have just read, which of these three parts of the business plan is the most important to you?

Please select one answer only

- Sewage Flooding of gardens and outbuildings
- Sewage flooding of properties
- Pollution Incidents
- Don't know/can't say

The following slide describes one of the additional components of Thames Water' business plan; Water Resources Management - water demand, helping customers save water

Water Resources Management: Water demand, helping customers save water

Making sure there is enough water available in the future

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

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

- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- When there is not enough water (drought), water companies can introduce temporary water restrictions, such as hosepipe bans. Severe droughts could mean rationing water for everyday activities or turning off supplies for certain periods during the day.

What we will do and benefits to customers

- Install around 1 million smart water meters to help homes and businesses keep track of their water use and save water.
- Visit 125,000 homes and 30,000 businesses to help them use water more efficiently.

Thames Water has a target in its proposed business plan for 2025-2030 to reduce the average amount of water each person uses to 134.6 litres a day.

The following slide describes one of the additional components of Thames Water' business plan; Water Resources Management: water supply, providing new sources of water

Water Resources Management: water supply, providing new sources of water

Making sure there is enough water available in the future

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

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

- Making sure there is enough water available to protect the natural environment as well as providing a public water supply.
- When there is not enough water (drought), water companies can introduce temporary water restrictions, such as hosepipe bans. Severe droughts could mean rationing water for everyday activities or turning off supplies for certain periods during the day.

What we will do and benefits to customers

- Invest in new sources of water and modernise our infrastructure to protect supplies and reduce the risk of us running dry during prolonged periods of drought.
- Start work on planning several projects to provide new sources of water, such as transferring water from other water companies, recycling water and building a new reservoir.

Thames Water has a target in its proposed business plan for 2025-2030 to only need to introduce severe water use restrictions, such as standpipes in the street and water rationing, on average once every 100 years.

Based on what you have just read, which of these parts of the business plan is the most important to you?

Please select one answer only

Water Resources Management: water demand, helping customers save water

- Water Resources Management: water supply, providing new sources of water
- Don't know/can't say

The following slide describes one of the additional components of Thames Water' business plan; Reducing pollution of rivers from sewage spills

Reducing pollution of rivers from sewage spills

Reducing sewage spills into rivers and improving river health

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

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

- Reducing pollution of seas and rivers by sewage overflows.

What we will do and benefits to customers

- Improve and increase the size of the sewer network to hold and treat more sewage, to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.

Thames Water has targets in its proposed business plan for 2025-2030 to reduce the average number of sewage spills into rivers from each overflow pipe to 17.4 a year.

The following slide describes one of the additional components of Thames Water' business plan; Improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works to prevent sewage overflowing into rivers

- As our population grows, increased amounts of wastewater (including rainwater) and the solid parts of sewage arrive at our sewage treatment works putting pressure on its treatment capacity.
- This can mean the treatment process becomes overloaded, resulting in lower quality treated wastewater being returned to rivers.
- This in turn can cause a fall in the river quality downstream of our sewage works impacting the health of the river.

What we will do and benefits to customers

- Upgrade existing sewage treatment works where increased housing developments are planned, to ensure sewage doesn't exceed the capacity of the treatment works and high standards of treatment can be maintained.
- This would involve an expansion of the treatment facilities with new equipment being built and installed.

Thames Water has a target in its proposed business plan for 2025-2030 to upgrade or expand 13 sewage treatment works between 2025 and 2030, specifically to cater for increased housing developments in these areas.

Based on what you have just read, which of these parts of the business plan is the most important to you?

Please select one answer only

- Reducing pollution of rivers from sewage spills
 - Improving the capacity of sewage treatment works
 - Don't know/can't say
-

Based on everything you have seen and read about Thames Water's proposed business plan, how acceptable or unacceptable is it to you?

Please select one answer only

- Completely acceptable **Please go to Question Q29**
 - Acceptable **Please go to Question Q29**
 - Unacceptable **Please go to Question Q28**
 - Completely unacceptable **Please go to Question Q208**
 - Don't know/can't say
-

Answer if you selected "Unacceptable" or "Completely unacceptable" at question 27 (Q27 above)

What are the two main reasons that you feel the proposals for your water services are unacceptable?

Please choose up to two answers only

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

Other 2, please specify

Don't know/ can't say

Answer if you selected "Acceptable" or "Completely acceptable" at question 27 (Q27 above)

What are the two main reasons that you feel the proposals for your water supply are acceptable?

Please choose up to two answers only

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term
- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements

Other 1, please specify

Other 2, please specify

Don't know/ can't say

Long term investment by Thames Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?

Please select one answer only

An increase in bills starting sooner, spreading increases across different generations of bill-payers

An increase in bills starting later, putting more of the increases onto younger and future bill-payers

I don't know enough at the moment to give an answer

At the start of this survey, you were shown a graph with a prediction for bill increases.

Knowing what you know now about how that money is intended to be used, how easy or difficult do you think it would be for you to afford these water/sewerage bills?

Please select one answer only

Very easy

Fairly easy

Neither easy nor difficult

Fairly difficult

Very difficult

Don't know

Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Please select one answer only

Female

Male

I identify in another way

Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

Please select one answer only

High managerial, administrative or professional e.g. doctor, lawyer, medium / large company director (50+ people)

Intermediate managerial, administrative or professional e.g. teacher, manager, accountant

Supervisor, administrative or professional e.g. police officer, nurse, secretary, self-employed

- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q34**
- Student
- Prefer not to say

Answer if you have selected “retired” at question 33 (Q33 above)

Does the main income earner have a state pension, a private pension or both?

Please select one answer only

- State only
- Private only **Please go to Question Q35**
- Both **Please go to Question Q35**
- Prefer not to say

Answer if you have selected “private only” or “both” at question 34 (Q34 above)

How would you describe the main income earner’s occupation type before retirement?

Please select one answer only

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed
- Student
- None of these
- Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion.

Please select all that apply

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background

Please select one answer only

WHITE

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

MIXED

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

ASIAN OR ASIAN BRITISH

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

BLACK OR BLACK BRITISH

- Caribbean
- African
- Any other Black background

OTHER ETHNIC GROUP

- Arab
- Any other ethnic group
- Prefer not to say

Which of the following bands does your household income fall into from all sources, before tax and other deductions?

Please select one answer only

- Up to £199 a week/Up to £10,399 a year
- From £200 to £299 a week/From £10,400 to £15,599 a year
- From £300 to £499 a week/From £15,600 to £25,999 a year
- From £500 to £699 a week/From £26,000 to £36,399 a year
- From £700 to £999 a week/From £36,400 to £51,999 a year
- From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- £2,000 and above a week/£104,000 and above a Year
- Don't know
- Prefer not to say

Classification Questions

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

Yes

No

Thames Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here:

<https://www.thameswater.co.uk/help/account-and-billing/financial-support>

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

Questionnaire (Affinity Thames supply area - Paper version)



Affordability and Acceptability Testing

Thank you very much for agreeing to complete this survey which is being conducted by Accent, an independent research agency. This survey is designed to help Thames Water, your water and wastewater service provider, to understand your views on how affordable and acceptable their future plans are.

We will just ask you a couple of questions to check that you are eligible to take part in this research.

Anyone who passes the qualification questions and completes the entire survey will be eligible for a £10 voucher (either an Amazon voucher, an M&S voucher or a One4All voucher). Alternatively, we can donate your incentive to WaterAid. Details on how to claim your voucher are given at the end of the survey. Please note, your answers must reach us by the **12th September 2023** to qualify for this incentive.

Any answer you give will be treated in confidence in accordance with the Code of Conduct of Market Research Society. If you would like to confirm Accent's credentials you can phone the Market Research Society on 0800 975 9596.

You do not have to answer any question you do not wish to and you may terminate the interview at any point.

When completing the survey please start from Question 1 (Q1) in the 'Scoping questions' section.

If at any point in the 'Scoping questions' section you find **"Thank you for your time, it is not possible for your survey responses to be included – please stop here."** written next to the answer you have selected, this means you are not eligible to take part in this survey. If this happens – thank you very much for your time, but you are not eligible to take part and should stop.

If you have answered the questions in the 'Scoping questions' section without that message appearing next to any of your answers please go to the "Main questionnaire" and follow the questionnaire order.

Scoping questions

Any data collected over the course of this interview that could be used to identify you, such as your name, address, or other contact details, will be held securely and will not be shared with any third party unless you give permission (or unless we are legally required to do so). Our privacy statement is available at <https://www.accent-mr.com/privacy-policy/>.

Please do not include names, addresses, or other personal data in your responses to any questions, unless asked to do so.

Do you agree to proceeding with the interview on this basis?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Do you or any of your close family work in market research or for a water company?

Yes **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

No

How old are you? Please enter your age.

Please enter your age on the line below

Under 18 **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Prefer not to say **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you the person in your household who is responsible, either solely or jointly, for paying for your water services bill?

Yes

No, I am not responsible for paying the bill **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Are you currently charged for water through a water meter?

Yes

No

Don't know

Affinity Water is your water supplier, and Thames Water is responsible for your sewerage services. Does this sound right?

Yes

No **Thank you for your time, it is not possible for your survey responses to be included – please stop here.**

Don't know

Thank you, if you have reached this point without having been told to stop, we can confirm you are in scope for the survey. The questionnaire will take about 15 minutes to complete.

Main Questionnaire

Affordability

We are now going to ask you some questions about your household's financial situation.

Thinking about your finances over the last year, how often, if at all have you struggled to pay at least one of your household bills?

Please select one answer only

- All of the time
- Most of the time
- Sometimes
- Rarely
- Never
- Prefer not to say

Overall, how well would you say you are managing financially now?

Please select one answer only

- Doing alright
- Just about getting by
- Finding it quite difficult
- Finding it very difficult
- Prefer not to say

Thinking about your household's financial situation over the next few years up to 2030, do you expect it to get

Please select one answer only

- A lot worse
- A bit worse
- Stay the same
- A bit better
- A lot better
- Prefer not to say
- Don't know

How easy or difficult is it for you to afford to pay your current water and sewerage bill:

Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

□ Proposed changes to your water/sewerage bill for the years 2025-2030.

The next set of questions are about proposed changes to your water & sewerage bill for the years 2025-2030. The chart below shows these changes. It also shows how inflation may impact on your bill, based on the Bank of England's inflation forecasts.

Water bills change each year in line with inflation.

Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

- If your household income keeps up with inflation (ie. increases at the same rate), then you are likely to notice little difference in what you are paying for things.
- If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.
- If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this. As well as changing by inflation each year, bills change by an amount set by Ofwat (the water regulator) as part of their price review process every five years.

The proposed bills you will see from 2025 to 2030 include the Bank of England forecasts for inflation from 2025 to 2030, and proposed amounts to cover the investment in water and sewerage services needed over the next few years.

The chart on the next page shows the expected increase in your water/sewerage bill over the next few years.

The blue part of each column is what the underlying change to your bills would look like if there were no inflation. The orange part is what inflation will add on top. So your actual bill would be the two parts added together.

The figure above each bar represents the total expected bill amount (the blue plus the orange)

If you currently receive financial support with your water bill, please note that this bill profile is based on the financial support scheme you are currently on.

Once you have read the above, and referred to the chart on the following page, please continue.



How easy or difficult do you think it would be for you to afford these water/sewerage bills?

Please select one answer only

- Very easy **Please skip question 12**
- Fairly easy **Please skip question 12**
- Neither easy nor difficult **Please go to Question 12**
- Fairly difficult **Please go to Question 12**
- Very difficult **Please go to Question 12**
- Don't know

Please only answer this question if you have selected “neither easy nor difficult”, “fairly difficult” or “very difficult” at Question 11 (Q11 above)

Which of the following do you think you would need to do to pay for the increase in your water bills between 2025 and 2030?

Please select all that apply

- Shopping around more
 - Spending less on food shopping and essentials
 - Spending less on non-essentials
 - Cutting back on non-essential journeys in my vehicle
 - Eat out less
 - Using less fuel such as gas or electricity in my home
 - Using less water
 - Using my savings
 - Using credit more than usual, for example, credit cards, loans or overdrafts
 - Ask family and friends for financial support
 - Other, please specify:
-
- Don't know

Acceptability

We are now going to ask you some questions about your views on your water company's business plan.

Water companies are required to put together business plans for each five year period. The plan we are showing you is for 2025- 2030.

The following chart shows how Thames Water are performing in the area of sewage flooding of gardens and outbuildings, against both their target and also the other water companies.

Sewage flooding of gardens or outbuildings

Number of properties affected, per 10,000.

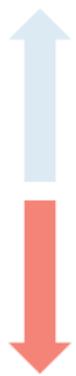
Companies with the lowest numbers perform better

Thames Water did not have a target for this metric last year

Thames Water is ranked 1st of 11 companies on this measure

Company	Performance
Thames	9.4
Severn Trent	10.8
Anglian	14.55
United Utilities	18.12
South West	18.13
Hafren Dyfrdwy	19.05
Wessex	19.19
Yorkshire	19.52
Southern	19.53
Welsh Water	26.27
Northumbrian	26.64

Better performance



Poorer performance

The following slide shows what Thames Water is proposing doing to improve things:

SEWAGE FLOODING OF GARDENS OR OUTBUILDINGS

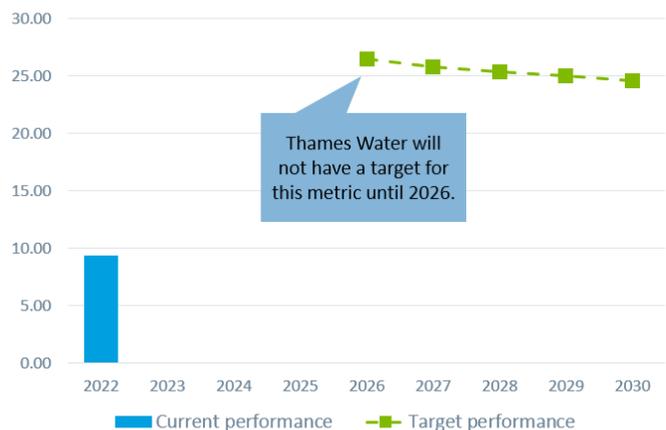
What we will do and benefits to customers

- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents.
- Continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number times sewage floods gardens and outside areas of properties to 24.58 per 10,000 properties per year, by 2030.

Targets for Sewage Flooding of gardens or outbuildings

Number of properties affected, per 10,000.
(A lower number is better.)



The following chart shows how Thames Water are performing in the area of sewage flooding of properties, against both their target and also the other water companies.

Sewage flooding of properties

Number of properties affected, per 10,000.

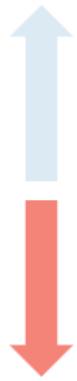
Companies with the lowest numbers perform better

Thames Water **has not met its target for this metric last year**

Thames Water is ranked **11th of 11 companies on this measure**

Company	Performance
South West	0.76
Welsh Water	1.36
Wessex	1.42
Severn Trent	1.61
Anglian	1.73
Northumbrian	1.84
Hafren Dyfrdwy	2.34
Yorkshire	2.83
United Utilities	2.97
Southern	3.04
Thames	3.46

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:

SEWAGE FLOODING OF PROPERTIES

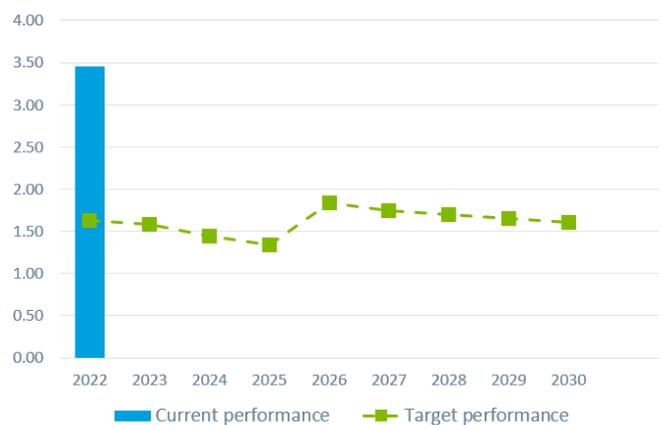
What we will do and benefits to customers

- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents.
- Continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number times sewage floods into properties to 1.61 per 10,000 properties per year, by 2030.

Targets for Sewage Flooding of Properties

Number of properties affected, per 10,000.
(A lower number is better.)



POLLUTION OF RIVERS AND BATHING WATERS

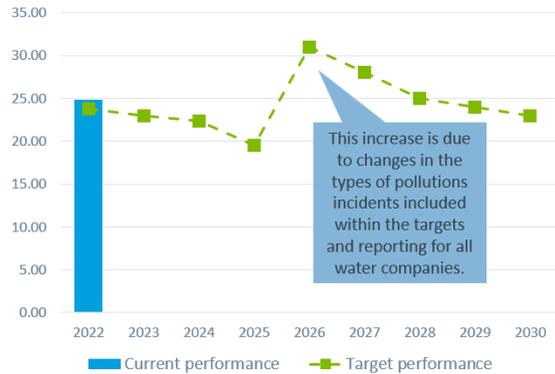
What we will do and benefits to customers

- Providing more storage on our sewer network
- Repair, reline or replace old and damaged sewers
- Add monitors/alarms to our sewers so we get early warning of potential pollution incidents.
- Clean sewers and educate customers

Thames Water has a target in its proposed business plan for 2025-2030 of reducing the number of pollution incidents per 10,000 km of sewer to 23 per year by 2030.

Targets for pollution Incidents

Number of incidents per 10,000km of sewer.
(A lower bar / number is better.)



The following chart shows how Thames Water are performing in the area of pollution incidents, against both their target and also the other water companies.

Pollution of Rivers and Bathing Waters

Number of incidents per 10,000 km of sewer.

Companies with the lowest numbers perform better

Thames Water has not met its target for this metric last year

Thames Water is ranked 6th of 11 companies on this measure

Company	Performance
United Utilities	17.71
Wessex	20.60
Severn Trent	21.81
Welsh Water	22.90
Northumbrian	22.98
Thames	24.87
Yorkshire	27.36
Anglian	33.75
Hafren Dyfrdwy	39.84
South West	86.58
Southern	93.63

Better performance



Poorer performance

The following chart shows what Thames Water is proposing doing to improve things:

Based on what you have just read, which of these three parts of the business plan is the most important to you?

Please select one answer only

- Sewage flooding of gardens and outbuildings
- Sewage flooding of properties
- Pollution Incidents
- Don't know/can't say

The following slide describes one of the additional components of Thames Water' business plan; Reducing pollution of rivers from sewage spills

Reducing pollution of rivers from sewage spills

Reducing sewage spills into rivers and improving river health

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

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

- Reducing pollution of seas and rivers by sewage overflows.

What we will do and benefits to customers

- Improve and increase the size of the sewer network to hold and treat more sewage, to reduce the number of sewage spills into rivers each year and the harm to wildlife and river users it causes.

Thames Water has targets in its proposed business plan for 2025-2030 to reduce the average number of sewage spills into rivers from each overflow pipe to 17.4 a year.

The following slide describes one of the additional components of Thames Water' business plan; improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works

Improving the capacity of sewage treatment works to prevent sewage overflowing into rivers

- As our population grows, increased amounts of wastewater (including rainwater) and the solid parts of sewage arrive at our sewage treatment works putting pressure on its treatment capacity.
- This can mean the treatment process becomes overloaded, resulting in lower quality treated wastewater being returned to rivers.
- This in turn can cause a fall in the river quality downstream of our sewage works impacting the health of the river.

What we will do and benefits to customers

- Upgrade existing sewage treatment works where increased housing developments are planned, to ensure sewage doesn't exceed the capacity of the treatment works and high standards of treatment can be maintained.
- This would involve an expansion of the treatment facilities with new equipment being built and installed.

Thames Water has a target in its proposed business plan for 2025-2030 to upgrade or expand 13 sewage treatment works between 2025 and 2030, specifically to cater for increased housing developments in these areas.

Based on what you have just read, which of these parts of the business plan is the most important to you?

Please select one answer only

- Reducing pollution of rivers from sewage spills
- Improving the capacity of sewage treatment works
- Don't know/can't say

Based on everything you have seen and read about Thames Water's proposed business plan, how acceptable or unacceptable is it to you?

Please select one answer only

- Completely acceptable **Please go to Question Q22**
- Acceptable **Please go to Question Q22**
- Unacceptable **Please go to Question Q21**
- Completely unacceptable **Please go to Question Q201**
- Don't know/can't say

Answer if you selected "Unacceptable" or "Completely unacceptable" at question 20 (Q20 above)

What are the two main reasons that you feel the proposals for your water services are unacceptable?

Please choose up to two answers only

- The bill increases are too expensive
- Company profits are too high
- Companies should pay for service improvements
- I expect better service improvements
- The plan is poor value for money
- Compared to energy prices it is more expensive
- I am dissatisfied with current services
- The plans don't focus on the right services
- I won't be able to afford this
- I don't trust them to make these service improvements
- Other 1, please specify

Other 2, please specify

Don't know/ can't say

Answer if you selected "Acceptable" or "Completely acceptable" at question 20 (Q20 above)

What are the two main reasons that you feel the proposals for your water supply are acceptable?

Please choose up to two answers only

- The plan is good value for money
- The plan is affordable
- Compared to energy prices it's cheaper
- Their plans seem to focus on the right services
- The company provides a good service now
- I support what they are trying to do in the long term

- The change to my bill is small
- I trust them to do what's best for customers
- I have been dissatisfied with the service recently but am pleased that they are making improvements
- Other 1, please specify

Other 2, please specify

Don't know/ can't say

Long term investment by Thames Water will require an increase in customer bills. Bills could increase in different ways over time. For example, there could be increases now for current bill payers, or bigger increases in the long term for future generations. Which one of the following options would you prefer?

Please select one answer only

- An increase in bills starting sooner, spreading increases across different generations of bill-payers
- An increase in bills starting later, putting more of the increases onto younger and future bill-payers
- I don't know enough at the moment to give an answer

At the start of this survey, you were shown a graph with a prediction for bill increases.

Knowing what you know now about how that money is intended to be used, how easy or difficult do you think it would be for you to afford these water/sewerage bills?

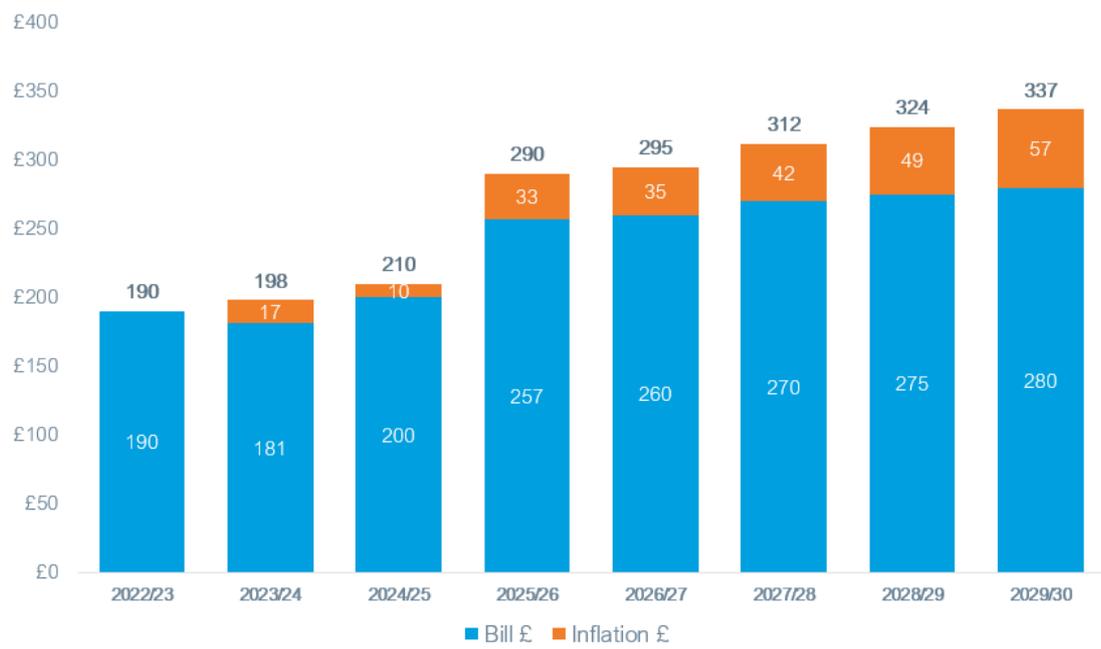
Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

Previously we showed you a graph that displayed how your combined water and waste bill might change over the next 7 years. Thames Water only supply wastewater services in your area though, and so that graph included costs for water services that Thames do not provide and cannot control.

The graph on the following page shows **just the waste component of your bill** (that is, the part provided by Thames Water).

Please bear in mind that your water bills are likely to increase over the same period as previously shown.



How easy or difficult do you think it would be for you to afford these waste only bills?

Please select one answer only

- Very easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Very difficult
- Don't know

Household Demographic

Thank you. Now just a few questions to check that we are speaking to people of all types.

In which of the following ways do you identify?

Please select one answer only

- Female
- Male
- I identify in another way
- Prefer not to say

Which ONE of the following best describes the occupation of the main income earner in your household? If you or the main income earner are self-employed please tick the option that most relates to the type of work you/they do for the company(s) you/they work for.

Please select one answer only

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife/Househusband
- Unemployed
- Retired **Please go to Question Q29**
- Student
- Prefer not to say

Answer if you have selected "retired" at question 28 (Q28 above)

Does the main income earner have a state pension, a private pension or both?

Please select one answer only

- State only
- Private only **Please go to Question Q30**
- Both **Please go to Question Q30**
- Prefer not to say

Answer if you have selected "private only" or "both" at question 29 (Q29 above)

How would you describe the main income earner's occupation type before retirement?

Please select one answer only

- High managerial, administrative or professional** e.g. doctor, lawyer, medium / large company director (50+ people)
- Intermediate managerial, administrative or professional** e.g. teacher, manager, accountant
- Supervisor, administrative or professional** e.g. police officer, nurse, secretary, self-employed
- Skilled manual worker** e.g. mechanic, plumber, electrician, lorry driver, train driver
- Semi-skilled or unskilled manual worker** e.g. waiter, factory worker, receptionist, labourer
- Housewife / househusband
- Unemployed
- Student
- None of these
- Prefer not to say

Which of the following apply to you? We would like to collect this to ensure that a variety of particular needs are represented in the study, but you do not need to answer if you do not wish to. This information will not be shared with any third party and will be deleted within 12 months of project completion.

Please select all that apply

- I or another member of my household is disabled or suffer(s) from a debilitating illness
- I or another member of my household have/has a learning difficulty
- I or another member of my household relies on water for medical reasons
- I or another member of my household is visually impaired (ie struggles to read even with glasses)
- I or another member of my household am/is over the age of 75 years old
- I or another member of my household speaks English as a second language
- I or another member of my household is deaf or hard of hearing
- I or another member of my household is a new parent
- None of these apply to me
- Prefer not to say

What is your ethnic group? Choose one option that best describes your ethnic group or background

Please select one answer only

WHITE

- English, Welsh, Scottish, Northern Irish or British
- Irish
- Gypsy or Irish Traveller
- Any other White background

MIXED

- White and Black Caribbean
- White and Black African
- White and Asian
- Any other Mixed background

ASIAN OR ASIAN BRITISH

- Indian
- Pakistani
- Bangladeshi
- Chinese
- Any other Asian background

BLACK OR BLACK BRITISH

- Caribbean
- African
- Any other Black background

OTHER ETHNIC GROUP

- Arab
- Any other ethnic group
- Prefer not to say

Which of the following bands does your household income fall into from all sources, before tax and other deductions?

Please select one answer only

- Up to £199 a week/Up to £10,399 a year
- From £200 to £299 a week/From £10,400 to £15,599 a year
- From £300 to £499 a week/From £15,600 to £25,999 a year
- From £500 to £699 a week/From £26,000 to £36,399 a year
- From £700 to £999 a week/From £36,400 to £51,999 a year
- From £1,000 to £1,399 a week/From £52,000 to £72,799 a year
- From £1,400 to £1,999 a week/From £72,800 to £103,999 a year
- £2,000 and above a week/£104,000 and above a Year
- Don't know
- Prefer not to say

Classification Questions

We mentioned that there would be a £10 incentive for completing this survey. This incentive will be administered by Accent, within 4 weeks.

This can be sent as an Amazon, Marks & Spencer or One4All voucher by email. Alternatively, we can donate your incentive to WaterAid. Which would you prefer?

- Amazon voucher by email
- M&S Voucher by email
- One4All by email
- Donation to Water Aid

If you have any queries about your incentive, please contact us on 0131 220 8770.

Thank you. Would you be willing to be contacted again if we need to clarify any of the answers you have given today?

- Yes
- No

Thames Water offers help to qualifying low-income households that are struggling to afford their water bills. More information about this can be found here:

<https://www.thameswater.co.uk/help/account-and-billing/financial-support>

Thank you. This research was conducted under the terms of the MRS code of conduct and is completely confidential.

APPENDIX E

Cognitive testing Report

Question	Comments	Action
General One	<ul style="list-style-type: none"> The survey was found to be easy to navigate The information in the survey was found to be useful and The questions were straightforward and participants did not have issues completing them A number of participants appreciated the visuals as charts helped bring the information to life Participants' understanding of the comparative data tables improved as they went through the slides Thames Water was seen as being transparent with their results and participants have appreciated this 	None required
	<ul style="list-style-type: none"> Some participants felt the survey was rather long It had a fair bit of reading Some participants struggled with understanding the comparative data tables and charts 	None required
Initial demographics	No difficulties in this section, participants just went straight through them	None required
Affordability (Questions 9-13)	Majority of participants had no issues answering these questions and stated these are the type of questions they were expecting to be asked in this section	None required
	One participant felt some of these questions were a bit too personal and Thames Water should not know this	None -required – these questions are mandated and it is expected for people to feel uncomfortable answering questions about finances in front of another person. When completing the survey participants will do this on their own and the awkwardness will be removed
Bill increase/inflation chart	<ul style="list-style-type: none"> Majority of participants understood the information and could navigate this page easily One participant like that the bill was personalised 	None required

	<p>Generally the graph was understood but two participants were confused and asked:</p> <ul style="list-style-type: none"> • Why does the amount in blue go down after the first year? • One participant suggested having the total amount and then in brackets have the year one year number • Had difficulty reading the legend and suggested increasing the font 	<ul style="list-style-type: none"> • None required – new pricing calculator to be included in the final survey • N/A – the data is displayed as per guidance • We will increase the font size in the legend
Q14 /Q15(affordability of proposed bills)	<p>These questions were easy to understand and there we no issues completing them</p>	<p>None required</p>
	<p>non-household participants were more comfortable answering this question than household as they felt they have a plan for the future. HH were more wary answering this</p>	<p>None required</p>
Comparative Data (generally)	<p>Generally the slides have been well received and these are some of the things participants said:</p> <ul style="list-style-type: none"> • Found the information presented quite useful • Was easy to understand when they have and haven't met their targets • It was appreciated when the future plans were detailed 	<p>None required</p>
	<ul style="list-style-type: none"> • Some participants had difficulty understanding the graphs depicting the performance and the targets going forward • Some participants found it hard to read the legend on the graphs • Some participants did not understand why there was a target point that was not connected to the rest of the chart by a line 	<p>None required – the graphs are following guidance We will increase the font size of the legend on the charts We will add a line connecting the points</p>
	<ul style="list-style-type: none"> • Some participants mentioned it was difficult to interpret the data in the comparative data tables. • One participant said these charts were “meaningless” as they cannot compare Thames Water to any other water supplier 	<p>None required – these charts are mandated</p>
	<p>Participants have appreciated the pop-up explaining why the future target was going up</p>	<p>None required – perhaps use this on slides where there is an increase over the current targets (e.g. leaks slide)</p>
	<p>Some participants found it confusing that the future targets fluctuate on some of the charts</p>	<p>None required – Thames Water is to send through revised figures for these charts</p>

	One participant commented that the slides content and format were repetitive and they should not take a “cookie cutter” approach	None required – slides are created in a similar way so participants can navigate through the information on the slides easily and with familiarity
Unplanned interruptions	A participant found it hard to understand that the interruptions in minutes refers to the period over 3 hours	None required – due to the nature of the data this can be confusing sometimes
	One participant missed the sentence saying a lower number is better and suggested making the font larger	None required – the sentence is right at the top and no one else had an issue with it
	One participant suggested highlighting the boxes where Thames has met/not met their targets in red or green to make it easier to understand	None required – these slides follow guidance
Leakage charts/slide	This information on the slide was all clear and easily understood. However, this slide generated a lot of conversations around leaks that are outside the scope of this research	None required
Water quality	One participant did not understand why the quality of water is measured in costumer contacts about this and not the quality of water	None required
Internal sewer flooding	Easily understood and Thames position in the chart was picked up easily	None required
	The pop-up was appreciated and participants stated this was a very good way to justify the increase in the target	None required
	Participants have understood that Thames Water is doing better here, but have questioned why there wasn’t a target until now	
Pollution	The information was clear, however participants had a lots of opinion on pollution due to the recent reports in the media that are outside the scope of this research	None required
Q19/ Q23 Based on what you have just read, which of these three parts of the business plan is the most important to you?	Participants have answered in terms of what would have the largest impact for themselves/ their businesses	None required
	Some participants would have like to be able to select more than one option	None required – this question is mandated

Additional enhancements (Generally)	<ul style="list-style-type: none"> Participants received these slides well and were able to digest the information Participants also commented that it was good to see that Thames Water are planning to do work e.g. invest in smart meters 	None required
	The format of the slides with some text on top and the benefit straight after went down well with the participants "Not like the previous slides which were information overload with charts and tables and graphs."	None required
	Some participants commented that the slides were pretty plain and adding of some colour, making them more visually appealing may increase engagement with the information on the slide	Thames Water to consider revisiting these slides once the final ones have been decided
Water Resource Management Plan: water demand, helping customers save water	One participant mentioned introduction of colours to this slide would make it more appealing and help distinguish it from the following slide	None required
	One participant mentioned that the home visits to educate customers may be a bit extreme "surely there is something else they can do"	
Water Resources Management: water supply, providing new sources of water	Participants were very interested in and supportive of the idea of transferring water from other companies	None required
Reducing pollution of rivers from sewage spills	The information in the slides were clear, however this has triggered conversations about storms overflows due to recent articles in the media	None required
Additional enhancements NOT included in the survey	<ul style="list-style-type: none"> Due to the length of the interview showing all of these enhancements was not always possible Where time allowed interviewers presented the stimuli in alternative ways (e.g. starting from the top or from the end of the slide deck) in order to make sure that we covered all the slides as best as we can Generally these were well received and participants appreciated the numbers included in the slide. However, a minority wanted to know where those numbers came from 	None required

<p>National Environment Programme for Water (chalk streams)</p>	<ul style="list-style-type: none"> • Several participants commented that this sounded positive and if achieved it would be impressive • This was also something that many participants were not aware of 	<p>None required</p>
<p>Making the Water Supply More Reliable</p>	<ul style="list-style-type: none"> • information was clear and seen as a positive improvement if it can be achieved • participants mentioned this is quite an important point, especially ensuring that the elderly and the vulnerable are looked after • One participant mentioned they didn't like the wording of the first bullet point on benefits to customers. They left like Thames Water should just improve the network for all interruptions. They made a reference to it sounding like Del Boy, 'once in a lifetime', like a con artist. 	<p>None required</p>
<p>Reducing Basement Flooding From Trunk Mains Bursts</p>	<ul style="list-style-type: none"> • Participants commented that this is an investment worth doing (any enhancements to protect homes) – also been suggested to make these improvements when children are not at school and less traffic on the road • One participant had a home flood some years back and was very supportive of this investment • Some participant that felt this is not an issue in the area they live • One felt that they needed to see what works are being carried out now and what will the improvements be once this work is done to be able to make a decision on this 	<p>None required</p>
<p>Alternative water supplies in an emergency</p>	<ul style="list-style-type: none"> • The information on this slide was appreciated, especially the focus on the elderly • The increase of the number of tanker was also highlighted • One participant did not like the use of plastic bottles in this enhancement 	<p>None required</p>
<p>Long term water quality</p>	<ul style="list-style-type: none"> • Description was seen as concise and to the point • One participant felt this was a very good improvement, but questioned why is it a year and a half away? • A participant started worrying about the current level of bacteria in the water at the moment 	<p>None required</p>

	<ul style="list-style-type: none"> • One participant questioned why this is not done at all treatment facilities • One participant question why “only a part of” would be covered and not the whole treatment area 	
Improving the capacity of sewage treatment works	<ul style="list-style-type: none"> • The information in this slide was all clear • One participant suggested that the section survey explaining what are the benefits to the customer should really include how customers are benefitting or alternatively remove • The slide generated a lot of conversation why this has not been updated until now, how will the systems working, what about the existing housing etc. 	Potentially Thames Water to revise text and make the benefits to customers more obvious
Industrial Emissions Directive	<ul style="list-style-type: none"> • Easy to understand and the improvement of air quality and reduction of emission has been mentioned a number of times • One participant felt there wasn’t enough information on how this is going to work 	None required
Reducing groundwater entering sewers	<ul style="list-style-type: none"> • Participants felt that this was easier to understand and the information is very clear • It was felt that there was a good level of information included in the slide • Some participants felt that this enhancement is a priority as it is a result of climate change 	None required
End demographics	No issues in this section. Participants were able to fill these in correctly.	None required