



Thames Water Customer Voices

PR24 Foundational Research – Customer Voices

An analysis of customer views and expectations
of Thames Water, November 2021

Customer Voices findings

Report prepared by Verve and Signoi



Background and methodology

Setting the scene for PR24

- At the beginning of PR24, Thames Water synthesised customer and stakeholder research and insight from a number of sources to develop an insight framework that outlines 'What Customers, Communities and Stakeholders Want' (WCCSW) from the business (see next slide)
- The framework provides a set of detailed expectations of Thames Water across all of the areas in which it operates
- In order to begin the process of customer consultation for PR24 and validate the insight framework, the business has commissioned a foundational research initiative to conduct a 'broad and shallow' audit of customer views and expectations of Thames Water
- This will help to validate Sia partners research framework and ensure that there is nothing missing in terms of customer needs and expectations (see page 3 for the insight framework)
- With the brief to go as broad as possible, this research used a combination of research sources, including:
 - A review of all Twitter comments ('tweets') mentioning or directed at Thames Water over the past two years, to understand what conversations already exist
 - **Primary online qualitative research with the Thames Water Customer Voices panel, topped up with additional customer sample from the Verve Voices research panel (this is what this report will cover)**
 - A broad specification video-based 'ethnographic' element, to solicit content to enrich the findings from the above sources

Foundation insight framework* (Sia Partners)

What customers, communities and stakeholders want can be broken down into 15 high-level messages

Service that 'just works' today and in the future...

provided in an environmentally responsible way...

by a company that always has good customer service...

which gives something back to the society and communities it touches.

1 Water

2 Wastewater

3 Environmental Stewardship

4 Customer Experience & Support

5 Public Value

All audiences

- 1.1 I want a constant supply of safe high quality water at good pressure
- 1.2 I want you to fix leaks
- 1.3 I want you to be self-sufficient and ensure a resilient supply of water into the future

- 2.1 I want a reliable sewerage system that works 24/7
- 2.2 I want you to prevent sewer flooding into my home
- 2.3 I want a reliable wastewater service in the future
- 2.4 I want you to prioritise investment in sustainable wastewater infrastructure

- 3.1 I want you to stop polluting rivers
- 3.2 I want you to reduce the strain on the environment
- 3.3 I want you to reduce emissions at no extra cost

- 4.1 I want fair, affordable and accurate bills
- 4.2 I want ease of contact and quick resolution of my issue
- 4.3 I want you to treat me as an individual
- 4.4 I want you to minimise the impact of your operations

- 5.1 I want you to give something back to the community

Greater emphasis from stakeholders

We want you to ensure the long-term resilience of the water and wastewater system through continued investment in infrastructure and new sustainable strategic water supply arrangements and wastewater solutions (at the same time as improving core service)

We want you to improve the ecological health of rivers and restore natural habitats

We want you to collaborate with stakeholders to reduce the strain on rivers

We support the sector's 2030 net zero ambitions, but see potential to go beyond this

We want sufficient notice for planned works and information on length/severity of disruption

We want engaging and reliable communication for impactful unplanned incidents

We expect you to raise awareness of social tariffs and priority services with eligible customers

We expect stable leadership that engages effectively with stakeholders and communities

We want you to be responsible, transparent

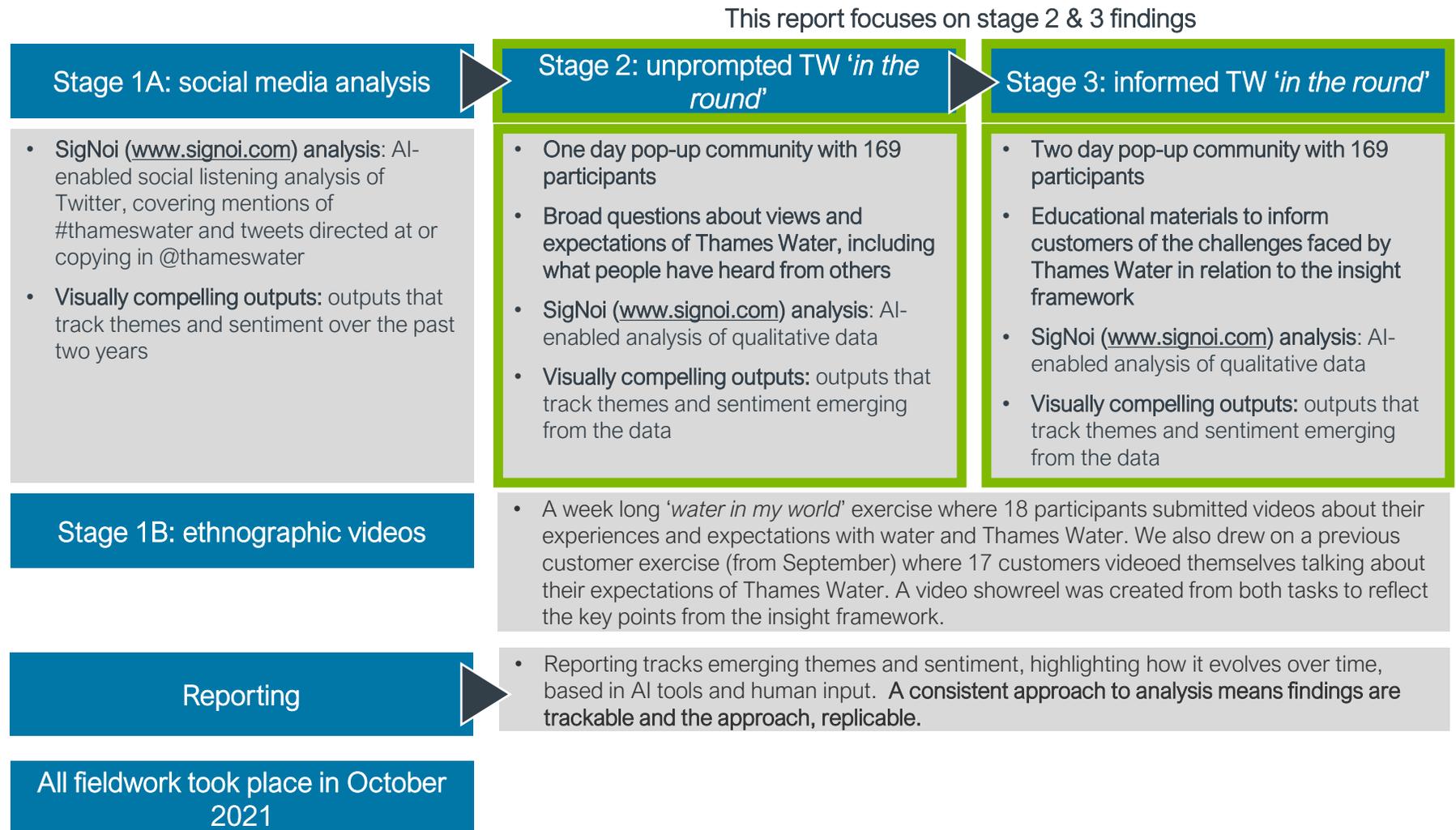
We want you to do more to benefit society for the long term

*Foundation insight framework as at October 2021, the term for (5) 'Public Value' was subsequently changed to 'Community Impact'

Our methodology

How we approached this work

- The AI content analysis tool 'Signoi' was employed to assist researchers in the analysis of over the outputs of the Customer Voices pop-up communities
- The tool uses semiotic, ethnographic and psychological principles to automatically identify implicit and explicit meaning in images and text
- A separate Twitter report reports the insight gained from stage 1, as well as there being a joint executive summary



Content analysed for the Customer Voices report (1)

An overview of discussion questions/content for the Customer Voices customer input

- In order to canvas customer views, two consecutive 'pop-up' communities were hosted
- A pop-up community is a secure online discussion platform in which customers can respond to questions and any stimulus to be shown at a time that suits them
- The first stage of the research with the Customer Voices panel aimed to solicit customers' unprompted views on Thames Water and some of the areas in which the business operates in
- A summary of the discussion questions posed to customers can be seen opposite
- The full bank of questions can be seen in the appendix

Unprompted discussion (1 day)

Activity	Title	Objective
Activity 1.1	Introduction and context	Objective: Setup, context and brief customer introduction
Activity 1.2	What do customers want and expect?	Objective: Understand spontaneous views of what customers want and expect from Thames Water. Also understand how customers compare Thames Water to other service providers (such as gas, electricity, internet)?
Activity 1.3	What do customers hear others saying?	Objective: Understand what family, friends, neighbours and their other social networks think about/are saying about Thames Water (both online and offline) and what they see on/in the news
Activity 1.4	What do customers want to see across the areas in which Thames Water operates?	Objective: Understand what is important to customers in terms of 'service that works', 'environmentally responsible practice', good customer service' and 'giving back to society and the community'
Activity 1.5	What kind of input do customers want to have into Thames Water's business planning?	Objective: Understand the areas in which customers feel they can meaningfully have an input and where they think they are less able to comment constructively

Content analysed for the Customer Voices report (2)

An overview of discussion questions/content for the Customer Voices customer input

- Following the first unprompted customer community, a follow up community was hosted
- The second community ran over two days and provided information about 10 Thames Water customer commitments, tied to the five insight themes:
 - Water
 - Wastewater
 - Customer experience and support
 - Environmental stewardship
 - Public value (or 'giving something back')
- A summary of the questions can be seen opposite
- The topics were randomised in order of which they were shown to customers
- Again, the full bank of questions can be seen in the appendix

Prompted discussion (2 days)

Activity	Title	Objective
Activity 2.1	Feedback on customer issues	Objective: understand thoughts on, expectations of Thames Water and what is missing from the 10 customer commitments: <ol style="list-style-type: none">1. Great customer service2. Treat me as an individual3. Bill affordability4. Constant, safe, high quality, good pressure water5. Fix leaks6. A resilient water supply for the future7. Prevent sewer flooding8. A resilient sewer network for the future9. Services provided in an environmentally responsible way10. Giving something back to the community
Activity 2.2	Are views different for businesses?	Objective: Understand whether individuals that own businesses or deal with Thames Water as part of their job role exhibit different views when they think in business terms
Activity 2.3	Ranking customer commitments	Objective: Understand the overall aggregated ranking of importance to customers of each of the 10 customers commitments

Customer Voices research sample (1)

A broad selection of customers were consulted as part of this exercise; **169 in total**, broken out below

Demographic	Count	Demographic	Count	Demographic	Count
Gender		Household income		Ethnicity	
Male	100	Up to £10,000	7	White	122
Female	69	£10,001-£12,000	5	BAME	25
Age groups		£12,001-£14,000	1	Not stated	22
18-24	1	£14,001-£16,385	2	Vulnerability status	
25-34	36	£16,386-£19,747	9	Vulnerable	20
35-44	41	£19,748-£30,000	15	Non-vulnerable	147
45-54	34	£30,001-£40,000	22	Not stated	2
55-64	32	£40,001-£50,000	32	Specific vulnerabilities	
65+	15	£50,001-£60,000	5	Mobility issue	9
Not stated	10	£60,001-£70,000	13	Mental health condition	3
SEG		£70,001-£100,000	26	Chronic illness	7
ABC1	99	More than £100,000	11	Medical equipment	1
C2DE	40	Not stated	21	Other vulnerability	4
Not stated	30				

- Customer Voices is Thames Water's online research community of over 1,000 household customers, designed to be representative of all customers. It was formed in June 2021 using Panelbase and Verve Voices as recruitment sources, with a small number of customers signing up via Thames Water's website and social media posts.
- 16 customers from this base contributed comments as part of their business role
- Note: 'Not stated' refers to responses to sensitive questions where customers were given the option not to answer

Customer Voices research sample (2)

A broad selection of customers were consulted as part of this exercise; **169 in total**, broken out below

Demographic	Count	Demographic	Count	Demographic	Count
Bill assistance status		WRZ (water) areas		TRFCC (waste) areas	
No bill assistance	150	London	91	North West London	23
Flexible plan	3	Slough Wycombe Aylesbury	9	Lee Valley	22
Special tariff	11	Kennet Valley	7	South East London	21
Not stated/don't know	13	Swindon Oxford	6	West Berks, Reading, etc.	19
		Guildford	7	South West London	17
PSR status		No WRZ		Central North London	13
PSR	20		55	Surrey	12
Non-PSR	130	Non-WRZ water companies		Central Bedfordshire etc.	11
Not stated/don't know	19	Affinity Water	29	Hertfordshire	10
		South East Water	10	Central South London	7
Clean/waste status		Sutton & East Surrey	8	North East London	6
Clean & Waste	114	Essex & Suffolk	4	Oxfordshire, Swindon, etc.	6
Waste only	55	Southern Water	4	Essex And Thurrock	2

Customer Voices research sample (3)

A note on the breakdown of the customer base

- This research was intended to reach as broad a section of the Thames Water community as possible
- As such, we did not 'screen out' customers from taking part based on demographic factors
- In capturing potentially sensitive data such as SEG, ethnicity and vulnerability, a 'not-stated' option was offered; some customers chose not to record this information
- In many respects, study percentages of specific demographics closely matched that of the Thames Water customer base*
- In the table opposite, we have highlighted demographic attributes in which the study percentage varied from the customer base percentage by more than five points
- In some cases, specific demographics were over- and under-represented, although given the numbers of 'not stated' responses, this cannot be said to be definitive
- From a robustness perspective, it can be said that no groups had a 'negligible' input, save for the 18-24 age group, given that the feedback was largely qualitative
- This commentary should be understood in the context of both the time-scale and budget allocated for this work

Demographic	Study %	Customer base %
Male	59	49
Female	41	51
18-24	1	15
25-34	21	21
35-44	24	19
45-54	20	17
55-64	19	12
65+	9	16
Not stated	6	n/a
ABC1	59	62
C2DE	24	38
Not stated	18	n/a
White	72	74
BAME	15	26
Not stated	13	n/a
Vulnerable**	12	14
Non-vulnerable	87	86
Not stated	1	n/a
Affinity Water	53	59
South East Water	18	16
Sutton & East Surrey	15	13
Essex & Suffolk	7	11
Southern Water	7	n/a

* 'Customer research and sampling approach September 2018' document, supplied by Thames Water

** This measure is the percentage of those declaring a personal vulnerability; the customer base definition is based on 'disability in the household', which would arguably be more prevalent

Verve's declaration that this research observes standards for high quality research (1)

Ofwat's minimum standards for high quality research	How we met these standards
Useful and contextualised	<p>This research was conducted to help Thames Water challenge and validate its insight framework of customer wants, which was also based on insights from the previous price review and insights from continuous customer, community and stakeholder engagement from the intervening years. This was to provide a starting point for further insight gathering during the PR24 price review period.</p>
Neutrally designed	<p>In this research we spoke to household customers, mostly sourced from Thames Water's just-formed Customer Voices panel, via an online community method. To supplement the insights from this we also undertook a large scale analysis of Twitter messages mentioning Thames Water and directly to and from the Thames Water Twitter account. This comprised approximately 100,000 tweets between July 2019 and September 2021.</p> <p>In the online community activity we ensured questions were open, with careful follow up prompts, to allow customers to express themselves spontaneously, then with more considered views of what they want and expect from Thames Water.</p> <p>An artificial intelligence tool was used to analyse the online community responses and tweets in a thorough and consistent manner. Established models of sentiment (e.g. Plutchik's Wheel of Emotions) were used in this process. Analysis was quality checked, supplemented and refined by human researchers.</p> <p>We ensured that questions and stimulus in the research used plain English for maximum comprehension.</p>
Fit for purpose	<p>We used a qualitative and data analytical methodology to fully meet the objectives of this research. Statistically robust data from the Twitter analysis was used to sense check the interpretation of the qualitative insights.</p> <p>The online community approach (used for the qualitative stage) enabled individuals to take part that may not have normally had the time to attend focus groups or workshops (in-person methods that Thames Water used a lot for its PR19 customer research). The online community method also allowed customers to express themselves individually and more freely without the social pressure of a focus group/workshop scenario. We ensured that questions and stimulus in the qualitative survey used plain English for maximum comprehension.</p> <p>We did not feel this research was complex enough to require piloting before the fieldwork started, but as the online community allows our researchers to individually moderate each participant, if there was any misunderstanding of the research activities then there was an opportunity to clarify things.</p>

Verve's declaration that this research observes standards for high quality research (2)

Ofwat's minimum standards for high quality research	How we met these standards
Inclusive	<p>For the qualitative part of the research we spoke to a broadly representative group of household customers. Strict quotas were not set, as we wanted to encourage as wide and large a response as possible across our panel. See the full 'Customer Voices' report for a full breakdown of the sample.</p> <p>We didn't get enough non households or future customers participating in the research to conduct any meaningful analysis of these segments, so a separate foundational exercise was conducted with these segments as part of the subsequent Vision 2050/public value research.</p> <p>The online community methodology allowed individuals to have a voice where other methods may have restricted this. For instance, those that work full time, have family commitments, certain disabilities, financial issues or language barriers might find it difficult to participate in other research methodologies. With the exception of not being able to reach people with limited or no access to the internet, online methodologies work well to attract involvement from a good cross section of Thames Water's customer base.</p> <p>The Twitter analysis encompassed a wide spectrum of commentators, including customers, pressure groups and other stakeholders.</p>
Continual	<p>Thames Water's research and engagement programme is continuous. The findings from this research will be used in conjunction with previous and future insights to inform Thames Water's day-to-day service delivery (e.g. to improve customer satisfaction), business plan and long-term delivery strategies.</p>
Independently assured	<p>Thames Water's research and engagement programme and line of sight process will be reviewed by an independent expert assurance partner as part of PR24 assurance.</p>
Shared in full with others	<p>Thames Water are planning to share research reports, including this one, with other water companies and with the general public.</p>
Ethical	<p>Verve is a member of and abides by the code of conduct of the Market Research Society.</p>

A note on Twitter analysis vs Customer Voices panel analysis

Two quite different sources of insight

- This research was undertaken with two different audiences, the reports for which are available separately
- The **Twitter** analysis was based upon the last two year's worth of tweets (back to July 2019), either mentioning Thames Water or as tweets directly to and from the Thames Water official Twitter account
- Given that the Twitter data already existed, this is 'raw' feedback, based on conversations that have already been happening
- While it is certainly not exclusively the case, Twitter can tend to be a place where individuals go to air their grievances and share their experiences; as a result, much of the content may be negative and/or focusing on specific problems (e.g. leaks and bursts, or reacting to a Thames Water announcement of an ongoing issue)
- On the other hand, the **Customer Voices** analysis was slightly more directed, in that customers were recruited from a pre-existing research panel that they have opted to be part of. While this may have a tendency to include those more positive and open about Thames Water than the Twitter audience, this is certainly not exclusively the case
 - In addition, customers were given very specific questions to respond to, and so feedback provided is more consistently organised
- Across both audiences we saw coverage of similar topics (i.e. what is important to customers), and while the Twitter audience has a tendency to be more negative in tone, there was a clear balance of positivity and negativity for both Twitter users and Customer Voices panel members
- For context, at the time of the research there had been ongoing (over a year) national and local media coverage of sewage overflows into rivers as well as more recent summer flash floods in London. These events may have heightened awareness and concern with these issues compared to the last price review.



Executive Summary

Customer Voices community analysis

Customer Voices feedback strongly supports the insight themes* generated by Sia partners

Service that 'just works' today and in the future...

provided in an environmentally responsible way...

by a company that always has good customer service...

which gives something back to the society and communities it touches.

1 Water

2 Wastewater

3 Environmental Stewardship

4 Customer Experience & Support

5 Public Value

Unprompted

- First and foremost, customers want a clean and reliable supply of water
- There is also commentary about managing wastewater effectively, ensuring the blockages and spillages are avoided
- There is a healthy degree of positive sentiment about how the business manages this

- Almost unequivocally, customers want Thames Water to act sustainably and protect the environment
- Avoiding the pollution of waterways is mentioned often

- Customers most commonly ask that their bills are fair and affordable
- They also want reassurance that Thames will help them quickly and effectively, whatever the issue

- Customers want Thames Water to reinvest into the communities they operate in
- There were more unprompted mentions of this compared to the Twitter analysis

Prompted

- In general, Thames Water's commitments in these areas were positively received; many commend Thames Water's aims as pre-emptive thinking that chimes with what customers want and expect
- A number of customers highlight poor customer practices in terms of water waste and sewer blockages, and welcome Thames Water's educational initiatives
- However, many believe that much of this is what the business should be delivering by default
- There are some concerns that fixing leaks and establishing a more resilient sewer network are not in evidence in the real world

- Customers showed a good awareness of climate change and would like to see evidence of Thames Water playing its part here
- The commitment to green energy sources and carbon neutrality were praised, though it is not entirely clear how this would be achieved
- Customers expect that such progress should be visible and transparent

- Thames Waters commitment to helping the financially vulnerable was applauded
- And there was positive commentary from metered customers, claiming it had made them more in touch with their water usage and saved money
- Some customers relayed experiences of slow/ poor customer support

- There are frequent mentions of the wetlands being an invaluable asset
- Many were enthusiastic about local charities receiving funding and support for vulnerable members of the community
- Some felt this activity should not come at the expense of delivering core services

*Foundation insight framework as at October 2021, the term for (5) 'Public Value' was subsequently changed to 'Community Impact'

Customer commentary across each insight theme* (unprompted): the biggest talking points

Service that 'just works' today and in the future...

provided in an environmentally responsible way...

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1 Water

2 Wastewater

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4 Customer Experience & Support

5 Public Value

- Customers want a clean and reliable water supply
- Many are also keen to see a reduction in the number of leaks, sewer blockages and flooding
- There is a healthy degree of positive sentiment, with many largely happy with the service they receive; negative sentiment is often driven by what they see in the media or on the streets

- Customers want Thames Water to act sustainably and protect the environment more generally
- Some expand upon this, highlighting they should do more to avoid polluting waterways

- Customers' most common comments ask for fair and affordable bills, and support for those that are struggling
- They also want reassurance that Thames will assist them quickly and effectively, whatever the issue

- Customers want Thames Water to reinvest into communities that they operate in
- Helping charities and local initiatives, as well as education on saving water are mentioned
- Sentiment with the Customer Voices community is more positive here than on Twitter

*Foundation insight framework as at October 2021, the term for (5) 'Public Value' was subsequently changed to 'Community Impact'

Issues are in large part driven by the media landscape, of which a number of key topics were raised by customers

When we asked customers what they were reading or seeing in the news and social media, the stories were mostly negative, and many claim to want assurance from Thames Water that it is making headway in a number of areas:

Service that 'just works'
today and in the future...



Polluted waterways

- A recent Panorama show highlighting the effects of river pollution drew negative publicity towards private water companies who engage in this practice

by a company that always has
good customer service...



Educational efforts

- Conversely, there was awareness that Thames Water were trying to educate the public
- However, note this audience is more acquainted with Thames updates by the nature of being on a customer panel

which gives something back to
the society and communities



'Corporate greed'

- Underpinning some concerns that Thames could be doing more for the environment and its customers are perceptions that 'shareholders come first'

provided in an environmentally
responsible way...



Climate change

- News regarding flooding in Europe has raised the issue of climate change
- This has broadly trickled down to the wider public psyche and Thames' positive commitments has provided some reassurance

Customer reactions to service commitments were largely positive, though there are calls for further detail and proof in some cases

As the community existed in a considered environment, the sentiment here was largely positive when compared with the Twitter analysis.

Service that 'just works' today and in the future... Sentiment

1.1 Safe, high quality, good pressure water		This is expected of Thames Water and many customers believe it is excelling here. A minority who have experienced problems feel Thames Water's response has lacked empathy
1.2 Fix leaks		Mixed sentiment largely derived from a demand for more clarification as to the preventative measures Thames Water is taking and what 'working hard' entails
1.3 Resilient water supply		A well received initiative that shows Thames Water is thinking about the future issues of climate change; some feel Thames Water's track record is poor here and so view this promise with skepticism
2.1 Prevent sewer flooding		Educating customers is seen as an essential step but most want to learn what else Thames Water is doing here, creating a range of reactions from curiosity to disappointment. There is a view from some that Thames Water is doing the minimum
2.2 Resilient sewer network		Interpreted by most as a great initiative from Thames Water and showcases they are committed to sustainability. A small minority feel timescales are lacking and doubt Thames Water can deliver as promised

Customer reactions to service commitments were largely positive, though there are calls for further detail and proof in some cases

Customers in the community largely accepted these promises at face value, there were fewer requests for details compared with the water and waste service commitments

provided in an **environmentally responsible** way...

Sentiment

3.1 Environmental responsibility



Many customers believe the green energy sources and commitment to carbon neutrality are good news; there are some lingering doubts as to how this will be achieved

by a company that always has **good customer service**...

4.1 Bill affordability



Many customers are happy with current prices, particularly those on smart meters, who note how useful this has been

4.2 Great customer service



Most believed these were excellent commitments and that the service was going to be even better as a result. Some felt this should be the default and are underwhelmed by their own experiences

4.3 Treat as individual



The commitment to helping the financially vulnerable is appreciated and the commitments were seen as succinct, clear and on point. Negative sentiments are driven by a minority who claim to have experienced poor customer service in the past

which gives something back to the society and communities it touches

5.1 Giving something back



Customers were very positive about this and frequently mentioned the importance of wetlands; more detail was requested of what charities would receive donations and what areas would receive support from Thames Water

There is a strong degree of support from customers for Thames Water's themes*, even if this is not their experience at present

- Service that 'just works' today and in the future...
 - provided by a company that always has **good customer service...**
 - provided in an **environmentally responsible way...**
 - which gives something back to the society and communities it touches.



Commitments seen as positive and necessary pre-emptive measures to help combat issues caused by climate change

Also positive, although more detail is required as to how and when Thames Water will invest here, would likely accentuate positive sentiment

Most believe these are excellent commitments and are greeted with little skepticism, promise to help financially support customers was the highlight for many

Commitment to green energy sources and carbon neutrality were the highlights for many, some wanted to know how this would be achieved

Initiatives paint Thames Water as a socially conscious company; customers wanted to know what charities and communities would receive support

*Foundation insight framework as at October 2021, the term for 'Public Value' was subsequently changed to 'Community Impact'

In summary, the initiatives proposed by Thames Water resonate with customers when discussed in a considered community environment

Some strongly positive feedback from customers but still many issues in evidence

- Most of the sentiment towards Thames Water is more positive compared with the Twitter analysis. This is unsurprising granted most of the conversations occur within a considered environment
- At a spontaneous level, customers are considered with issues relating to the impacts of polluted waterways, climate change and perceived 'corporate greed'
- While Thames Water is indirectly linked with these themes, it is also noted as a company that is making positive strides in these areas, and so the sentiment towards them is largely positive
- Thames Water is clearly trusted by many customers; most appear to accept the initiatives on face value and believe they are well considered with regard to their needs
- Most of the negative sentiments result from customers wanting to know more details about how Thames Water will achieve these commitments, or being sceptical of the claims



Thames Water Customer Voices Topics Deep Dive

Unprompted content



What do you really want from Thames Water?

Topic Sentiment

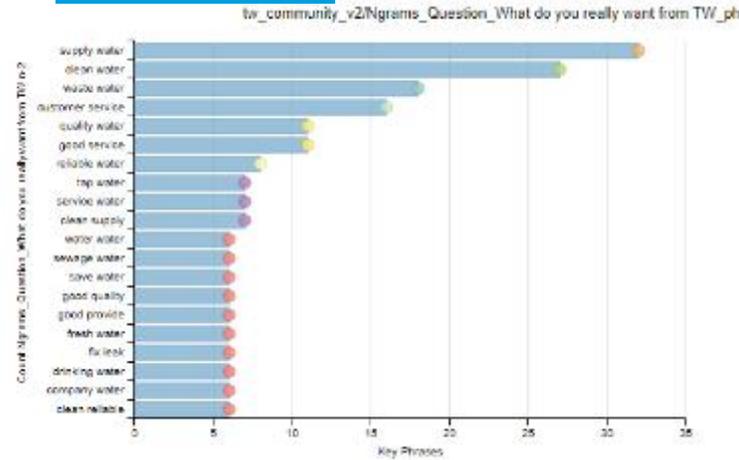


Thematic analysis - community

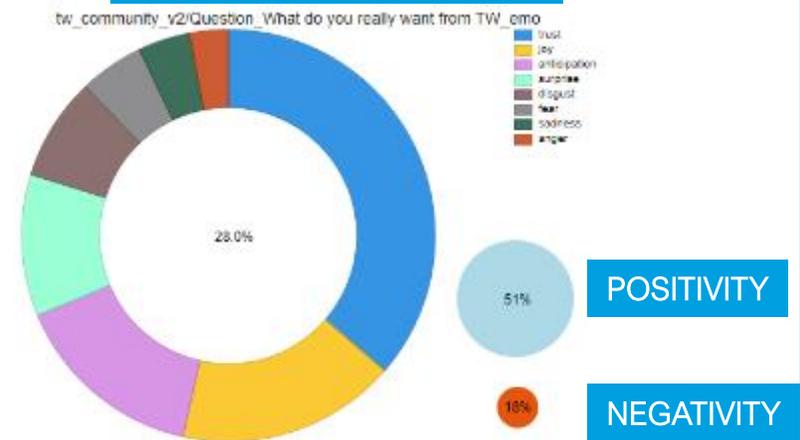
NOUNS



KEY PHRASES



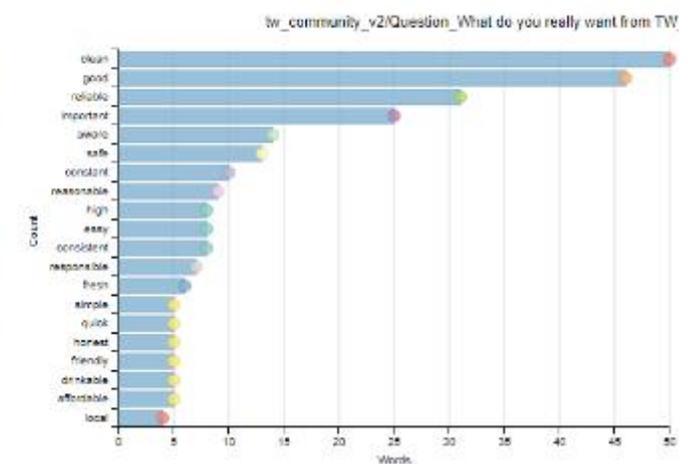
EMOTIONAL SPECTRUM



VERBS



ADJECTIVES



What do you really want from Thames Water?

Commentary - community

- Overall, sentiment is 67% positive, with only 14% negative
- At the highest level, unsurprisingly, customers are looking for a good clean supply of water
- This is reinforced by words such as constant and reliable, and wastewater is also mentioned frequently
- Customer service is mentioned as a priority, as is fixing leaks
- There are also less frequent mentions of:
 - Lower bills
 - Looking after the environment and acting sustainably
 - Not polluting waterways
- There's a sense that people want the basics done visibly well, with the business operating in a sustainable and ethical way in the background

I just want water to come out of the tap and waste water to disappear.

Female ABC1, Vulnerable, White, Regions

Innovation and how they handle challenges around climate change, population growth etc.

Female, SEG unspecified White, London

Consistent good quality water and minimising leakage in our neighbourhood.

Male, SEG unspecified, White, Regions

Maintaining level of service and quality of water is the most important aspect that I expect.

Male, SEG unspecified, BAME, London

An easy to use customer portal where I can manage everything to do with my TW account, usage and billing. I do not want to have to go to a lot of effort to update my account, meter readings, billing etc.

Female, ABC1, White, Regions

Deal with all the waste water and rainwater - by cleaning it up and then recycling it- eventually discharging it into the sea without causing any pollution. I expect this to be provided at a reasonable cost..

Male, ABC1, White, London

How does Thames Water compare to others?

Commentary - community

- Overall, sentiment is 48% positive, and 20% negative, suggesting the business is seen relatively favourably or at least similar
- Many adjectives suggest that your performance is 'good' 'the same' or 'similar' to others, but other frequently used words are 'reliable' 'easy' and 'great'
- Some customers mention that they have little option but to use Thames Water, although this is not specifically seen as a negative
- Some note that water bills are generally lower than those of other utility providers
- There are occasional mentions of performance and the need for investment:
 - The need for investment to upgrade existing infrastructure
 - Roadworks experienced locally
 - Incidences of rapid response in the event of issues

I think all these company's utilities are basically the same.
Male, C2DE, White, Regions

TW is fine, but no competition/choice like other service providers.
Male, SEG not specified, White, London

The website is detailed, informative and knowledgeable. as a consumer, you can learn more about TW and how they interact with the communities they serve.
Female, SEG not specified, BAME, London

When I have had cause to contact them I've always been treated with respect. In the upper echelons of customer service I've encountered.
Male, ABC1, White, London

Good. Although I think more investment is needed to upgrade old existing pipes.
Female, Vulnerable, C2DE, White, London

Probably a bit slower to react to issues and technological change than most.
Male, SEG not specified, White, Regions

What have you heard on social media?

Topic Sentiment

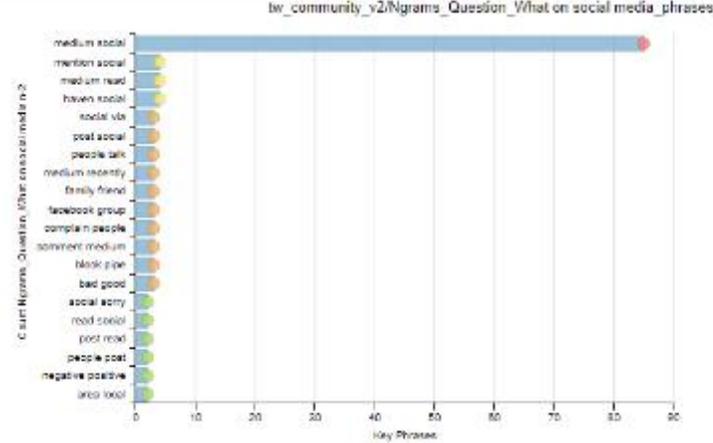


Thematic analysis - community

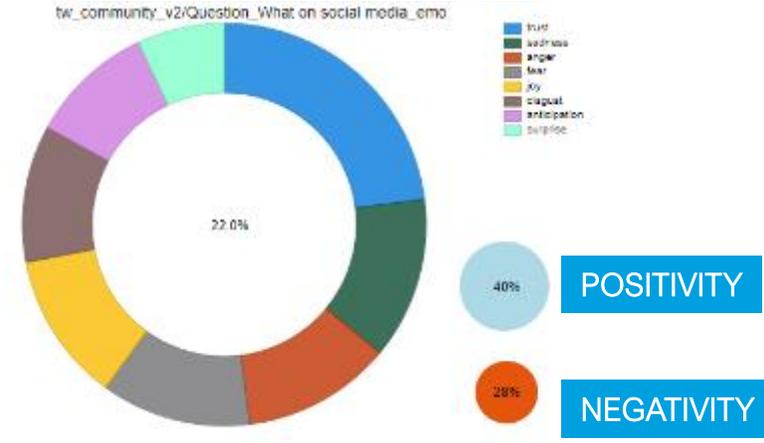
NOUNS



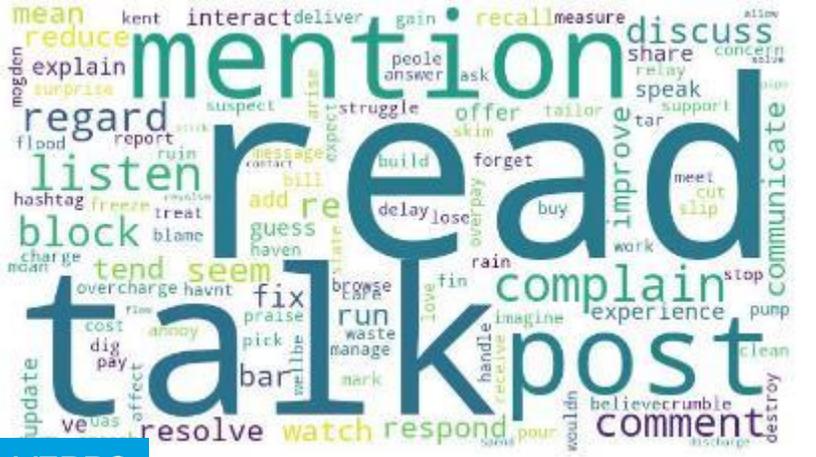
KEY PHRASES



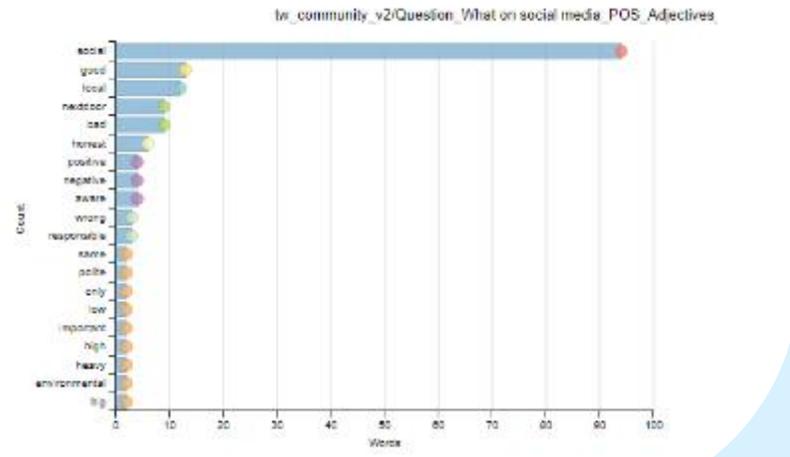
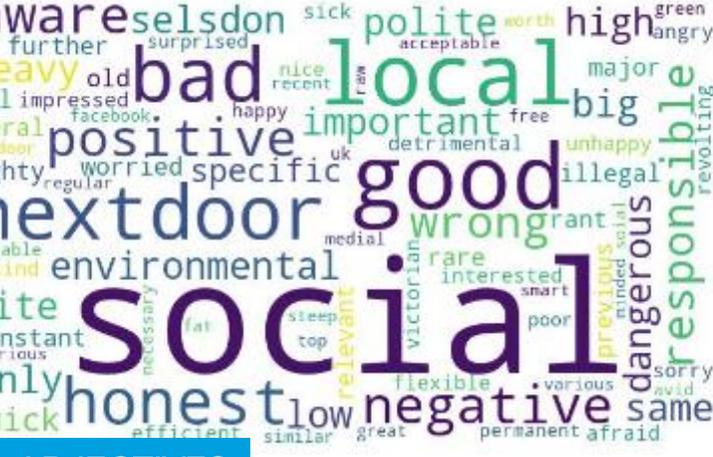
EMOTIONAL SPECTRUM



VERBS



ADJECTIVES



What have you heard on social media

Commentary - community

- Comments on what has been heard on social media are skewing towards negative (15%), with 29% displaying negative sentiment
- There are reports of good and bad comments about Thames Water on social media, with many also claiming to hear nothing or very little
- Most commonly, where there are specific comments, these are largely based around:
 - Sewage discharge
 - Leaks
 - Flooding
 - Poor service response
- There are some positive comments about Thames Water responding to customers rapidly via Facebook

I don't use social media. I use Nextdoor, but I have not heard any comments about them.
Male, ABC1, White, London

I was surprised at the number of negative comments and they all seem to be about the service received or charges to the customer..
Male, ABC1, BAME, London

I've heard about the illegal dumping of sewage into our rivers by many water firms, not just TW.
Female, ABC1, White, Regions

Very impressed with the quick response time & they were responding via Facebook as well..
Male, ABC1, BAME, London

The only things on social media I see are people complaining about water leaks in the road and constant road works.
Male, ABC1, White, London

On Nextdoor they are talking about the sewage discharge..
Male, C2DE, Vulnerable, White, Regions

What have you read/seen in the mainstream media?

Commentary - community

- Overall sentiment is negative, with 17% being positive and 235 being negative
- Many customers report that they have read or seen little if anything about Thames Water in the mainstream media
- Negative comments tend to focus on the following topics:
 - Issues with leakage
 - Shareholder dividends
 - Floods of recent years
- There are some individual comments on positive initiatives that Thames Water is undertaking, but these are in the minority, such
 - General innovation and improvements
 - Education on flushing behaviour

Panorama programme about the illegal dumping of sewage in rivers..
Female, ABC1, White, Regions

They are very big into climate change at the minute and are one of a number of big companies pushing to do more.
Male, SEG not specified, White, London

I have heard about innovations TW are looking to implement, what innovative devices they are offering to consumers
Male, ABC1, White, London

General impression from the media is that water utilities are too large, out of control and not taking responsibility for their actions..
Male, C2DE, White, Regions

Did see article a few years ago about not dealing with leakage but giving shareholders large dividends.
Female, C2DE, White, Regions

I am aware of a campaign to educate people about what they flush down the toilet...
Female, Vulnerable, ABC1, London

What is important – ‘good customer service’?

Commentary - community

- Overall sentiment is largely positive (63%) – though to be expected as this is about what customers *want* to see
- Words such as ‘friendly’, ‘timely’, ‘easy’, ‘efficient’ and ‘online’ feature heavily; ‘respect customers’ and ‘Friendly and helpful’ also feature as phrases
 - This sets the general tone for what customers are looking for
- Consistency and delivery as promised is also evident from customer comments
- ‘Email’ and ‘online chat’ are also noted as desirable by some
- Two specific comments from vulnerable customers highlight that treating customers as individuals is very important, as well as offering language options
- Others also highlight that it is important to help people that may be having difficulties

Friendly customer service and fixing problems in a timely manner.
Male, SEG not specified, White, London

To be able to always call back and resolve the issue. To keep it to the same person dealing with it.
Male, SEG not specified, BAME, London

My hope is that on the rare occasions you have to interact you are met with an understanding nature and feel listened to.
Male, Vulnerable, ABC1, White, London

Answering the phone or email messages quickly and getting to the point without having to wait. finding a resolution that works for the customer and quickly.
Male, ABC1, White, London

Fast accurate responses, and empathy to those with problems.
Female, C2DE, Regions

Accessible contact methods to ensure disabled customers and ones who don't have English as their first language aren't excluded.
Female, Vulnerable, C2DE, White, London

What is important – ‘service that works’?

Commentary - community

- Comment sentiment is largely positive, 44% compared to 24% negative
- As when looking at broad needs and expectations of Thames Water, the main comments are around ‘clean’ and ‘reliable’ supply of water with wastewater services mentioned also
- Other descriptors used include ‘consistent’, ‘safe’ and ‘quality’
- Other desirable, but less frequently mentioned issues are:
 - Preventing wastage/fixing leaks
 - Tackling sewerage problems/blockages
 - Minimising roadworks
- It is also noted by some that the infrastructure must be maintained effectively, and with an eye on good environmental practices
- One vulnerable customer wishes to see services prioritised for the elderly and disabled

I would like to see the service delivered sustainably with all leaks in the system resolved quickly.

Female, SEG not specified, BAME, London

Ensure the best possible service is given especially to the elderly and disabled.

Female, Vulnerable, C2DE, White London

Good delivery is important. Network maintained to avoid issues.

Female, C2DE, White, London

Speedy responses are always desirable! I would like to think that if I reported a leak in the street that it would be dealt with promptly.

Male, C2DE, White, London

Must be efficient and reduce leakage on an ongoing basis and ensure no pollution is caused with wastewater..

Male, C2DE, White, Regions

Service that works - most of us just expect when we turn on the tap that clean water will flow but updates to how TW is changing things from the pre existing infrastructure.

Female, C2DE, White, Regions

What is important – ‘environmentally responsible’?

Thematic analysis - community

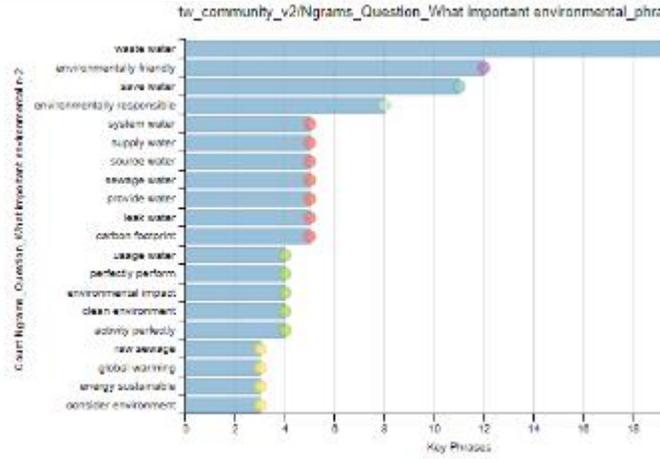
Topic Sentiment



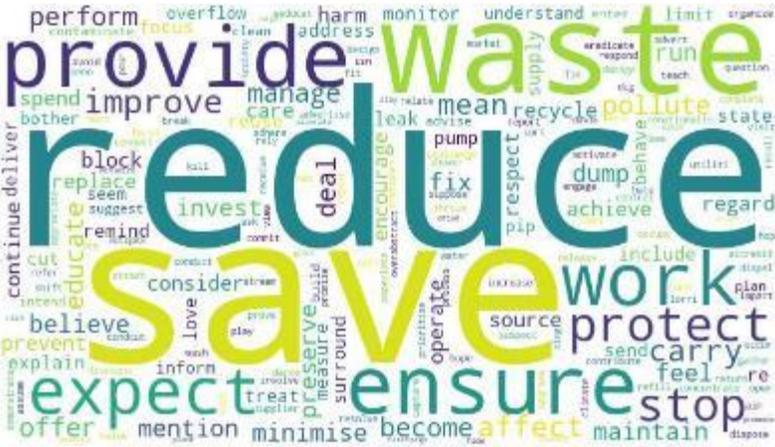
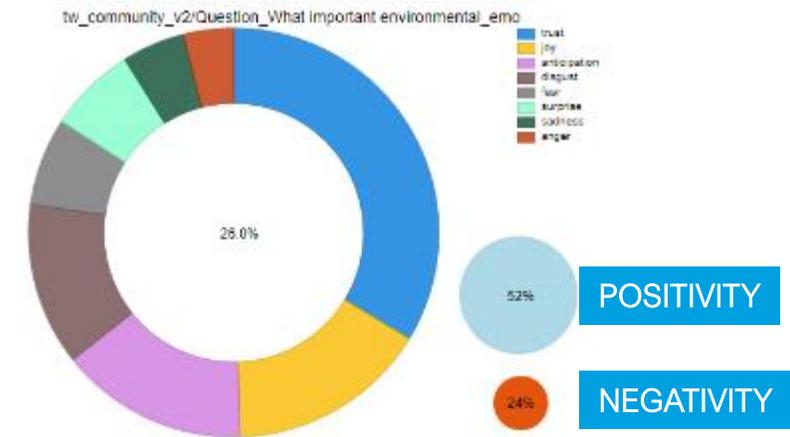
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KEY PHRASES



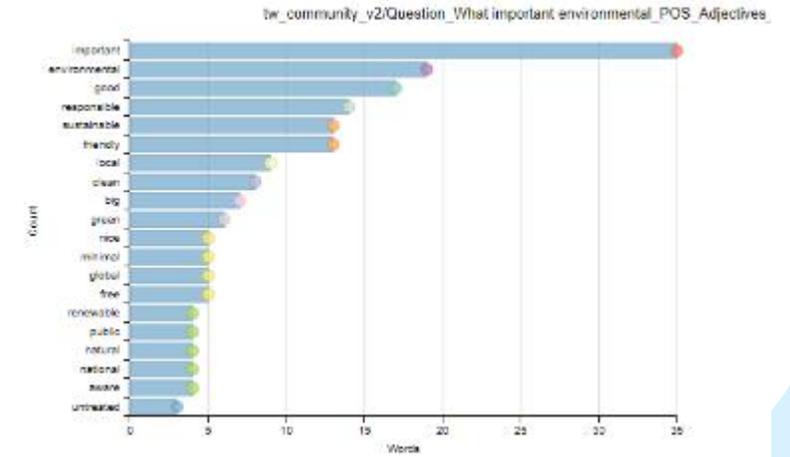
EMOTIONAL SPECTRUM



VERBS



ADJECTIVES



What is important – ‘environmentally responsible’?

Commentary - community

- Sentiment is broadly positive at 55%, with 18% classified as negative
- As one might expect, without prompting customers with extensive detail, comments focus largely around saving water and operating in an environmentally sustainable way
- There are many mentions focusing on reducing leaks, and a number of comments about ensuring that waterways are clean and ensuring the wellbeing of wildlife
- Less common but notable nonetheless are expectations that Thames Water’s operations are sustainable:
 - Lowering the business’s overall carbon footprint
 - The use of electric vehicles alongside other initiatives
- There are comments that suggest some customers expect Thames Water will be operating with all of these considerations in mind, as far as possible

I want to see cleaner water ways and also when TW carry out works I want to see them do it in a way that is the least environmental damaging way as possible..

Female, ABC1, BAME, London

Yes, we all need to net zero, so I would expect TW to make major efforts to become green, using electric vehicles for example

Female, ABC1, White, London

Minimal loss of water and improved energy efficiency should be a focus. If these are adhered to, everything else should hopefully fall into place

Female, Vulnerable, ABC1, White, Regions

Innovation. Genuine benefit for all, a commitment to eradicating wastefulness and bringing modernisation to services.

Male, Vulnerable, ABC1, White, London

I believe that the environment is taken into consideration with them already and not sure what else they could do..

Female, ABC1, Ethnicity not stated, Regions

It should put maximum efforts to reduce water wastage. It should use sustainable methods for supplying water to reduce carbon footprint do not release harmful pollutants while recycling water as it affects marine life.

Female, SEG not specified, BAME, Regions

What is important – ‘giving back’?

Commentary - community

- Overall sentiment is strong, with 74% of comments positive and only 7% negative
- While there are a number of individuals that claim this is not a priority for them, there are numerous mentions of ‘local’ initiatives that people would like to see, including:
 - Providing education about water and water-saving locally
 - Supporting local charities
 - Helping improve recreation sites
 - Providing water fountains in local areas
 - Apprenticeships for local people
- Another common theme is helping those vulnerable and less well off ensure that they can pay their bills; community includes all members of society in this respect

*Support water charities.
Female, C2DE, White, London*

*I don't care about this and don't want to pay extra for it.
Male, SEG not specified, White, London*

*I think free clean water should be provided for a fair price like putting little water stations where people can refill their own bottle with clean water so they don't need to buy more plastic.
Female, ABC1, White, London*

*Helping local charities and perhaps giving support to overseas charities like WaterAid. even if not financially able to support, seconded staff could be a personal development opportunity..
Female, C2DE, White, Regions*

*Support local communities by investing in the common waterways. Improving the areas around rivers/streams etc and making them clean and accessible for people to enjoy..
Male, C2DE, White, London*

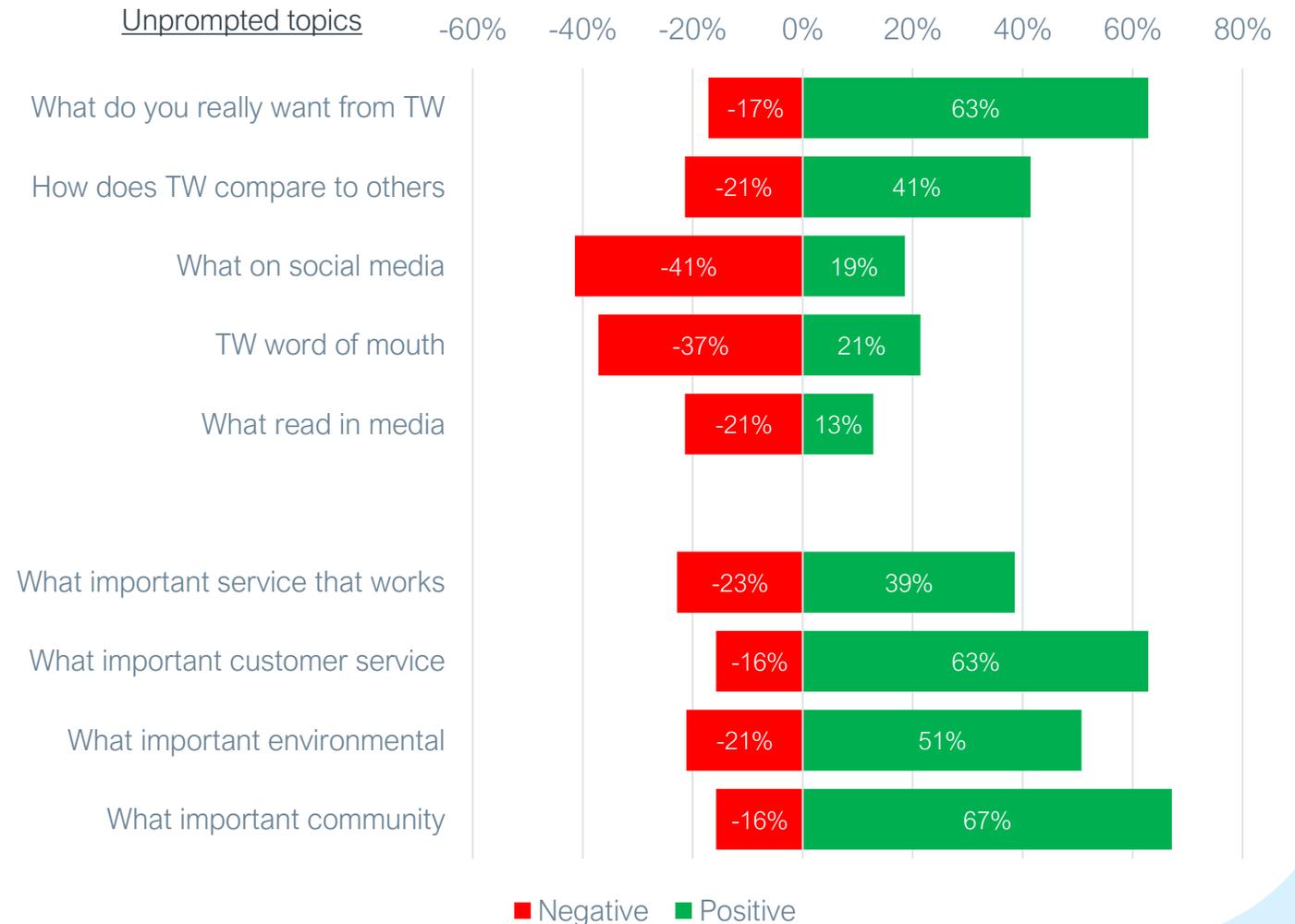
*Taking care of vulnerable people identifying and ensuring supply or water waste is top priority..
Female, Vulnerable, C2DE, White, London*

Sentiment varies by question and source

Word of mouth and social media are generally found to be particularly negative

- Expectations are of course positive, comparisons less so, and when people have heard about TW in the media or through word of mouth it tends to be negative
- Hygiene level delivery of a service that works comes through as critical

In general: Sentiment



Only this morning they were on the news something to do with the environmental damage they cause.

Male, ABC1, White, London

When they have major blockages like the famous fatbergs the water companies should be ensuring there is as much coverage in the media as possible. it's all about educating the public.

Female, ABC1, White, Regions





Thames Water Customer Voices Topics Deep Dive

Prompted content



Customers reviewed 10 prompted topics and were asked three questions for each

Customers were asked these questions for each:

1. In terms of *ISSUE*, Thames Water aims to achieve the following - now and into the future. Please take a read through the points below and tell us your thoughts on what you have read
2. Do these points reflect what you get or expect from Thames Water in terms of *ISSUE*? To what extent do they achieve this would you say?
3. Is there anything missing from these points in terms of *ISSUE*? What else could Thames Water be doing in this area – now and into the future? (please bear in mind there are other areas for you to comment on, so please stick to *ISSUE* in this answer)

How these appeared to customers

Great customer service

- Thames Water will do what it says it will. Whether to do with water, waste or customer service, this means fixing leaks, fixing issues at my property, responding to billing queries or anything else that I have a problem with
- Thames Water will do this quickly and promptly. They will turn up on time, they will respond to queries quickly, and they will fix problems and resolve queries to my satisfaction first time
- I can get in touch with Thames Water in the manner in which I choose and I will find the information I need, or there will be a team member to help, at a time that suits me
- I can easily access my bill and the information I need about my account, and it is all easy to understand and act on

Constant, safe, high quality, good pressure water

- Thames Water looks after the water network (pipes and treatment works) in a way that keeps repair works and supply interruptions to a minimum – so I have a constant supply of water
- The water that comes out of my taps is always of the safest quality for drinking, and looks, smells and tastes of the highest standard
- Thames Water works hard to fix and minimise customers' experiences of ongoing low water pressure

Treat me as an individual

- Thames Water will treat its customers as individuals and will provide a friendly and empathetic service
- If I have a problem, they will listen carefully and understand the circumstances I am facing, and act accordingly
- If I have any particular challenges, such as financial issues or health needs, they will acknowledge this and ensure that I have the right kind of support in my dealings with them and the services they provide

Fix leaks

- Thames Water works hard to fix leaks when they occur
- Thames Water's approach to fixing leaks shows that they care about the importance of our water supply

Topics as they appeared to customers continued:

Bill affordability

- My Thames Water bill is affordable and is one I am happy to pay in return for the services I receive from them
- The bills I receive are accurate and consistent, with no big surprises
- Any rises in the bill are communicated clearly, as well as any reasons for their increase
- Special tariffs are available and accessible for those that are struggling to pay their bills

Services provided in an environmentally responsible way

- Thames Water will reduce strain on the environment by taking less water from vulnerable sources like chalk streams (a rare type of river)
- Thames Water aims to improve the quality of rivers that have been at risk of pollution from sewage overflows, to bring those rivers up to standard for wildlife, for recreation, fishing and swimming
- Thames Water will increase its use of green energy and generate more of its own renewable energy such as extracting power from poo, solar power and wind turbines on its sites. This will help Thames Water to reach its target to become 'carbon neutral'

Giving something back to the community

- Thames Water acts as a good neighbour by giving something back to the communities in which it operates
- This involves activities throughout the Thames Water region, such as donating to charities, educational programmes, providing employment opportunities for local people and allowing recreational access to its reservoirs and wetlands
- It also means minimising the impact of things like sewage odour and roadworks in local areas

A resilient water supply for the future

- Thames Water is putting plans into place to help ensure we have a safe and plentiful supply of water into the future, meeting concerns such as climate change, extreme weather and a growing population
- This includes upgrading the water network (pipes and treatment works) for the long term
- Thames Water also aims to reduce leakage and educate customers on how to save water, before looking to find new sources of water from the environment

A resilient sewer network for the future

- Thames Water looks after the sewer network and storm drains to ensure that they are in good condition and have capacity to cope with demand in the face of climate change and a growing population
- This means ensuring that they can prevent sewage overflows into rivers

Prevent sewer flooding

- Thames Water works hard to reduce the risk of sewage flooding into homes, gardens and businesses
- This includes helping to minimise the blockages that can cause sewers to back up and overflow
- Part of this involves educating customers on what can be put down toilets and sinks

Great customer service: overall thoughts

Commentary - community

- Overall, sentiment is 67% positive, with only 9% negative
- Most people accepted these commitments on face value, and having no prior issue with Thames Water, interpreted this as an already positive aspect of the business that was going to get even better
- As the verbs show, the points listed here while appreciated, were largely expected of Thames Water
- While less frequently mentioned, some thought that as these promises should already be in place, it created an impression that the service is under par at the moment
- Also mixed in with this positivity was a desire to be more clear on what terms 'quickly' and 'on time' meant in real life practical terms

The points listed are impressive of TW, their customer service goals are really impressive, I would say positive on all the points listed.

Male, Vulnerable, SEG not specified, White, London

For some with underlying health conditions water as vital as electricity the bar needs to be set as high as possible and more to the point constantly achieved....and first time!

Male, Vulnerable, ABC1, White Regions

Its a comprehensive customer charter. if they can live up to it then that is great.

Male, ABC1, White, Regions

It all sounds good, but the devil is in the details. what does 'turn up on time' mean.

Male, SEG not identified, White, London

I am surprised to see that TW has not done till this now, anyway by doing this TW is moving in the right direction.

Female, SEG not specified, BAME Regions

The overall message is nice but I am not the greatest fan of the word "quickly". I think this word meaning different things to different people.

Female, ABC1, White, Regions

Treat me as an individual: overall thoughts

Topic Sentiment

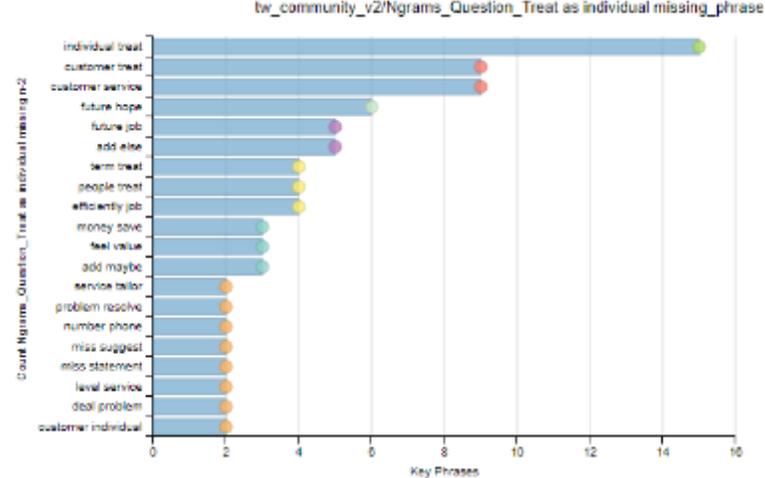


Commentary - community

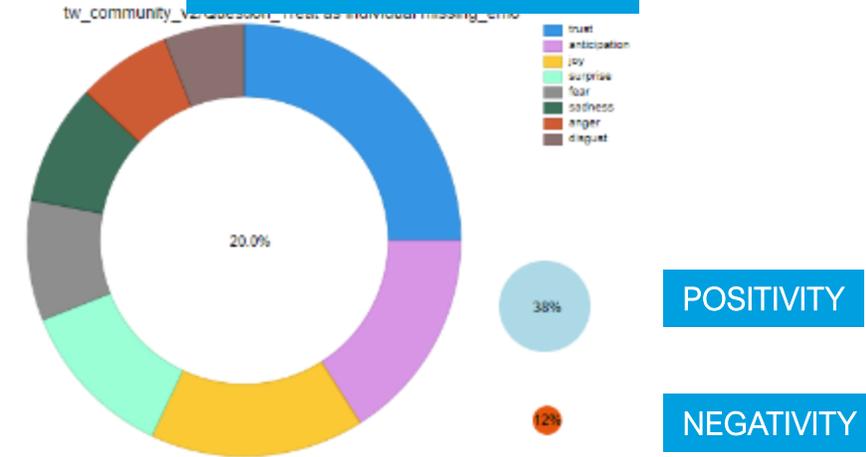
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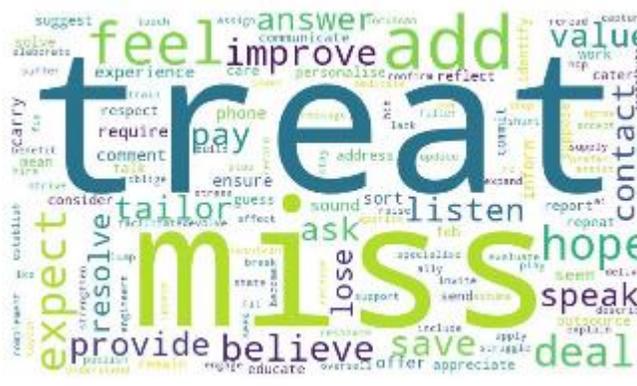
KEY PHRASES



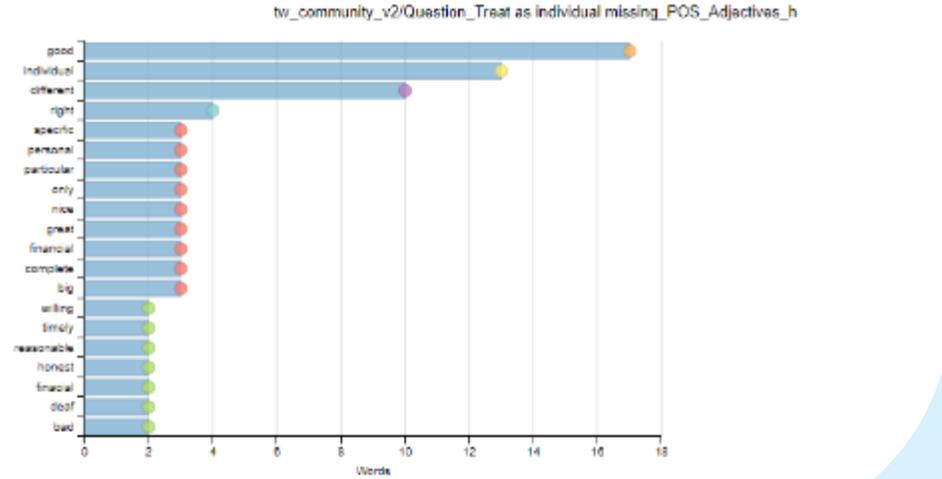
EMOTIONAL SPECTRUM



VERBS



ADJECTIVES



Treat me as an individual: overall thoughts

Commentary - community

- Overall, sentiment is 42% positive, with 25% negative
- Most comments applaud the helpful sentiments expressed by Thames Water
- The language was also broadly liked, with most claiming it was succinct, clear and perfectly encapsulated what they wanted from Thames Water in this area
- Thames' commitment to helping the financially vulnerable was greatly appreciated and indirectly signalled to customers that the promises here were genuine
- There was also mentions from those who had dealt with Thames Water before and found the staff to live up to these values
- The negative sentiments were largely driven by a minority who had a bad customer experience with Thames Water previously, claiming they lacked empathy and required better training on the systems to better tackle individual issues

It is clear and brief and to the point. I like the fact it is written in plain English and not 'overdesigned'.

Male, ABC1, White, Regions

Empathy is not an expression I would describe coming from TW staff.

Female, SEG not specified, BAME, London

What it's saying is that despite your circumstances, they will find a way to help you out.

Male, C2DE, BAME, London

I think the three bullets proposed are just, correct and essential.

Male, ABC1, White, London

These statements are perfect when they are achieved. I had to contact TW on a few occasions and I had a friendly adviser at the other end. Having the right support in times of hardship it's appreciated and an agreement to an affordable payment plan will make a difference for many families struggling financially.

Female, W

I particularly like the last sentence in regards to financial difficulty, it shows that TW cares about all their customers, even the ones struggling.

Female, ABC1, White, Regions

Bill affordability: overall thoughts

Commentary - community

- Overall, sentiment is 54% positive, with only 16% negative
- At the highest level, customers want a bill that is both affordable, accurate and easy to pay. This is reinforced by words such 'fair' and 'easy'
- There is also positive discourse on smart meters, whereby customers claim they have done a great job at making them more in touch with the amount of water they use while saving them money
- Less frequently mentioned was the narrative that 'it's a utility supplier I have to pay and I just hope that it is fair'
- However, even amongst those who were more disengaged, for the most part, there is a degree of trust towards Thames Water
- There's a sense that people that many are accepting of current bill amounts, and believe the business would help customers who were struggling to pay

It matches my experience. I know roughly how much my bill is going to be before I give a reading.
Male, ABC1, White, Regions

The bills explains the charges clearly and without nasty surprises.
Female, ABC1, White, Regions

Prior to switching to a metered supply I did not find bills affordable or well communicated. However, now that I am on a metered supply not only have my costs reduced significantly, but I am more aware of the supply I use.
Male, SEG not specified, White, Regions

TW is very affordable with their bills consistent and accurate. When there is an impending increase in tariff, it is communicated early enough.
Male, SEG not specified, White London

Since I had my water meter fitted I am very careful with my water usage, and I am generally aware of approximately what my bill will be.
Female, ABC1, White, London

All good, especially as it lets customers know there's help available if they're struggling.
Female, vulnerable, C2DE, White, London

Overall - Customer Service

Being treated as an individual receives the highest degree of positive sentiment

- Customer service discourse is significantly more positive and consistent across the board

They have always turned out quickly when we have had local problems with storm water discharges.

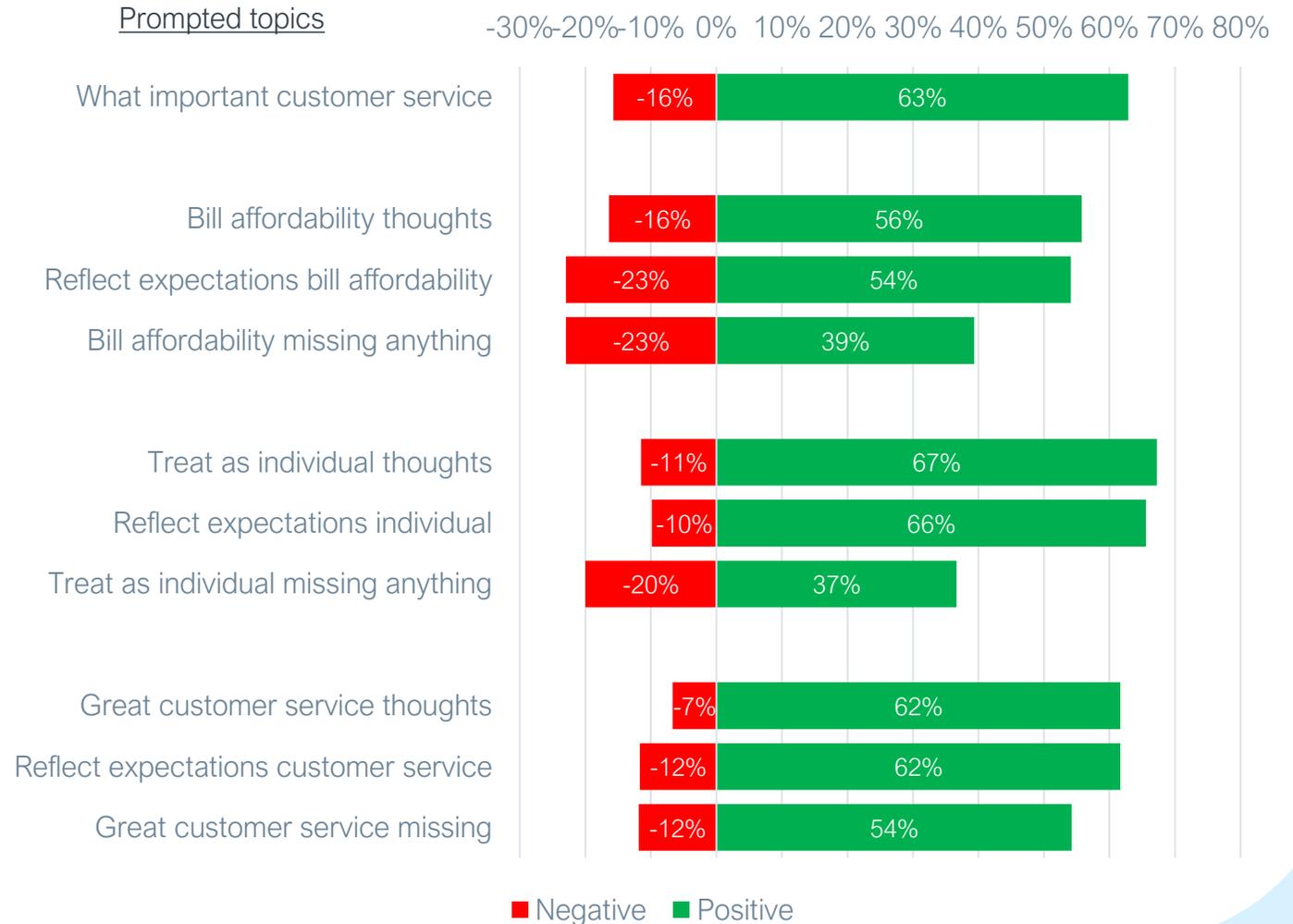
Male, ABC1, White, Regions

TW is reliable. I have lived in the same house for over 50 years. we have had water supply interrupted sometimes but not for long. This is usually planned and we are informed in advance unless there is an emergency which does not happen often.

Female, C2DE, White, Regions



Customer Service: Sentiment



Constant, safe, high quality water: overall

Commentary - community

- Overall, sentiment is 53% positive, with 16% negative
- At the highest level, clean water and good water pressure is expected from Thames Water
- Most comments expressed positivity that Thames Water were continuing to deliver a gold standard in these areas
- Those that had experienced low water pressure thought that Thames Water could have better expressed empathy for what is a considerable inconvenience
- This is a hygiene factor for Thames Water, and it is reassuring that the sentiment is largely positive here

*This is something you take for granted and expect to be receiving.
Male, Vulnerable, ABC1, White, London*

*As a statement this resonates well with me - I find it believable, trust-worthy and sets out good standards for the organization.
Female, SEG not specified, BAME, London*

*Maybe a bit of an overreach? things do go wrong and this doesn't really acknowledge that, except in the 'low pressure' area. I understand that can be very annoying, but for most people a period of 'no water' is a far more worrying thing and this statements doesn't acknowledge that.
Male, ABC1, White, Regions*

*Yes you expect a certain standard from a utility company. if you report that your water pressure is down then it should be completely investigated.
Female, Vulnerable, C2DE, White, London*

*I certainly think this instils trust in TW. I would agree that I have not ever had an issue with quality of water nor its pressure. That said I expect nothing less.
Male, C2DE, race and location not stated*

*I have experienced a low pressure shower only a couple of times in the last years, but every time its quite an annoying situation. in particular when you need a shower in the morning and you can barely wash.
Female, ABC1, White, London*

Fix leaks: overall thoughts

Commentary - community

- Overall, sentiment is 38% positive and 28% negative, and at the highest level, customers believe it is very important to fix water leaks
- The mixed sentiment largely consists of differing reactions to Thames Waters commitment here, the views are relatively polarising and broadly fall into two typical reactions
 1. *'This is great that Thames Water are making a commitment here, this is going to make a real difference'*
 2. *'They should be doing this anyway, and beyond good intentions, the promise feels vague'*
- In particular, the phrase 'work hard' is viewed as needing more clarification
- A less frequent theme raised by customers was that more thought should be given towards prevention as a means to avoiding leaks happening in the first place

'Works hard' and 'shows they care' aren't quantified and could mean different things to different people.
Female, Vulnerable, C2DE, White, London

I think this is all a rather wishy washy statement ...what exactly does "work hard" really mean.
Male, Vulnerable, ABC1, White, Regions

Maybe include how Thames is looking into how to avoid the leaks by replacing the older infrastructure or the monitoring of the pipes?
Female, C2DE, White, Regions

Of course TW fix leaks as soon as they can - it is in their interest to do so. It doesn't necessarily imply that they 'care'... it just means they are doing their job!
Male, C2DE, White, London

It's a positive approach as a water company to do their work diligently and also save the natural source.
Female, SEG not specified, BAME, Regions

What comes to mind is that they can and will fix leaks at any given time.
Male, C2DE, BAME, London

Resilient water supply: overall thoughts

Topic Sentiment

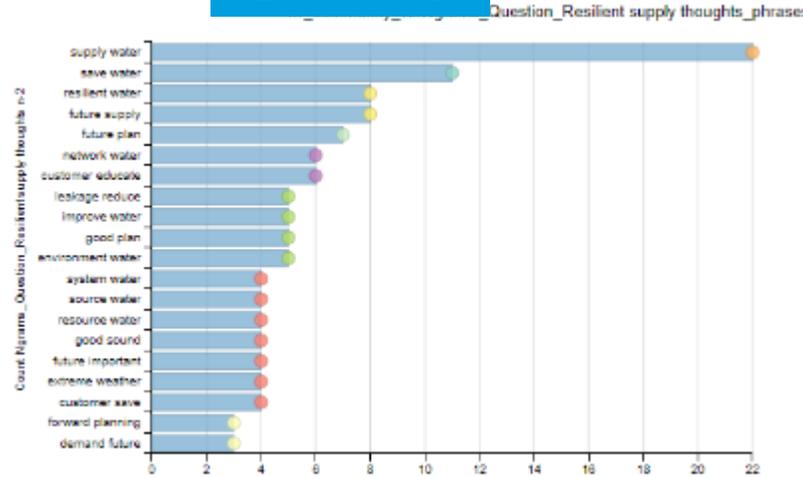


Commentary - community

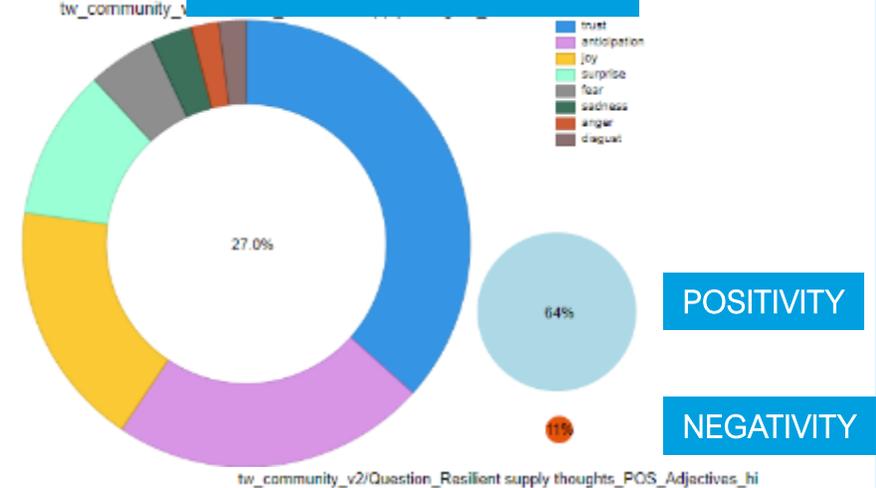
NOUNS



KEY PHRASES



EMOTIONAL SPECTRUM



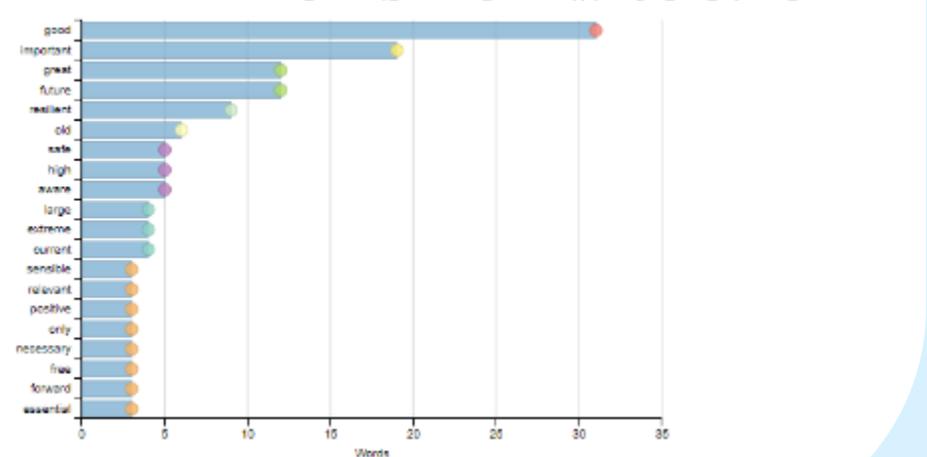
POSITIVITY

NEGATIVITY

VERBS



ADJECTIVES



Resilient water supply: overall thoughts

Commentary - community

- Overall, sentiment is 62% positive, with only 8% negative
- As the word clouds show, most comments express positivity that this is an important area to upgrade
- Most were greatly reassured by Thames' commitments here, interpreting them as positive pre-emptive efforts that showed competency and commitment to sustainability
- Most also expressed relief that this was being looked at, assuming that the job at hand was a significant one
- For a small minority, they believed Thames Water was hiding behind ambiguity and should provide timescales to show they are making meaningful progress here

TW is putting right efforts and build resiliency and continuity of supply.

Female, SEG not specified, BAME, Regions

Extreme weather is not out of the question anymore so they have to be prepared. When they are upgrading network pipes and treatment works I'd like to be notified.

Female, Vulnerable, C2DE, White, London

These are essential for the continual running and maintenance of the relevant company, it shows they are wanting to remain current and continue to strive towards sustainability.

Male, ABC1, White, London

It is an interesting and reassuring statement. Encapsulates what I wear to hear in terms of safety.

Male, Vulnerable, ABC1, White, London

It is good that it shows they are planning ahead not just plodding along. The replacement of the aging supply pipes is an ongoing and mammoth task.

Male, ABC1,

Posturing without any specific commitments. Will they achieve anything? How can we know? give numbers and timescales then we might have an idea.

Female, Vulnerable ABC1, White Regions

Prevent sewer flooding: overall thoughts

Topic Sentiment

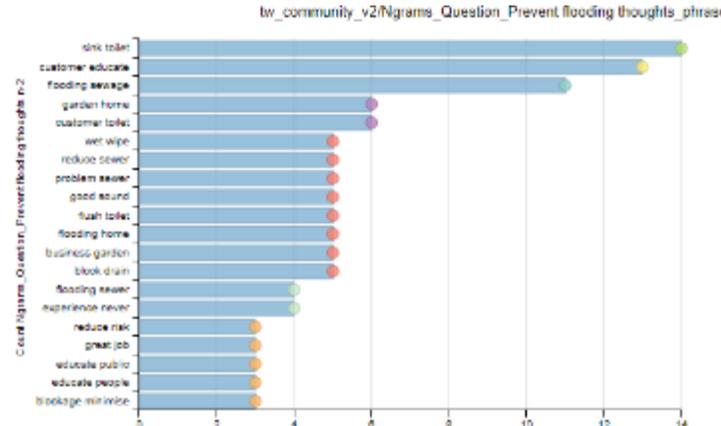


Commentary - community

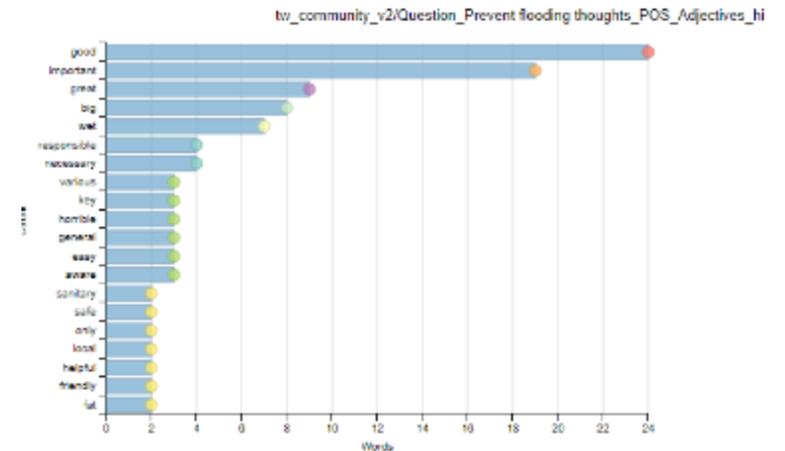
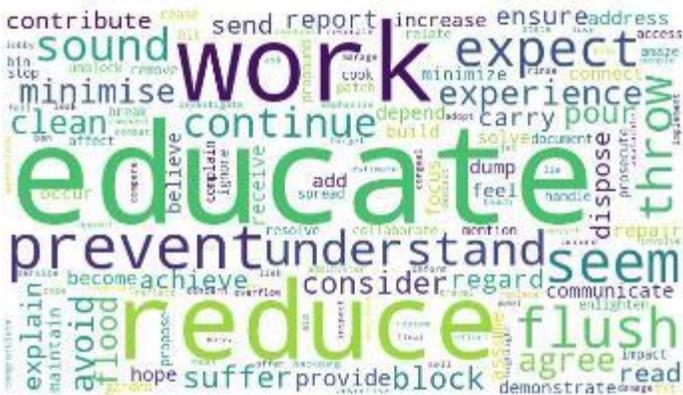
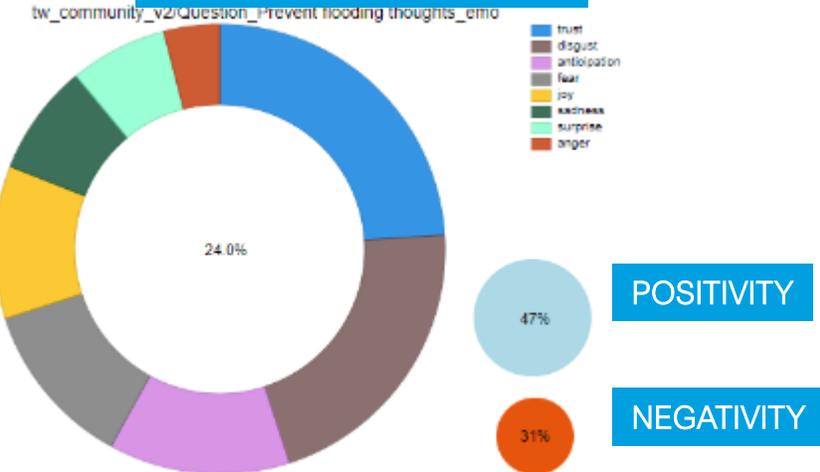
NOUNS



KEY PHRASES



EMOTIONAL SPECTRUM



VERBS

ADJECTIVES

Prevent sewer flooding: overall thoughts

Commentary - community

- Overall, sentiment is 40% positive, with 30% negative
- At the highest level, customers believe that wider education of the public concerning what they flush down the toilet are necessary steps to prevent flooding
- Most of the comments applaud Thames Water for addressing what many believe is the root of sewage overflows — a generally uninformed public
- However, many of the terms like ‘Good’ are followed with questions as to what else Thames are doing outside the sphere of education
- The significant amount of negative sentiment we see here, varies from curiosity to the sceptical conclusion that Thames are in fact, doing the bare minimum
- Listing what preventative measures are taking place outside of education would likely diminish the negative sentiment here

I think they could do a bit more to educate customers on what can be put down toilets and sinks.
Male, ABC1, BAME, London

Other than sending details of what not to put down the toilets and sinks, what else do they do?
Female, C2DE, White, Regions

It is great to know that TW are working in the background to minimise the chance of sewage flooding into my home and damaging it.
Female, SEG not specified, BAME, London

This is desperately needed. the ignorance of residents is unbelievable and needs severe penalties such as fines for misuse of disposal outlets.
Female, Vulnerable C2DE, White, London

Assuming that most blockages are caused by things like disposable nappies, continuing to educate customers is important. There will still have to be unblocking work done, and I don't see how much of any action is proposed.
Female, Vulnerable, ABC1, White, Regions

TW are trying hard to sound responsible, but in practice they are doing the bare minimum.
Male, C2DE, White, Regions

Resilient sewers: overall thoughts

Commentary - community

- Overall, sentiment is 40% positive, with 23% negative
- As the adjectives show, most feel this is a good initiative that is important for the future
- There was an awareness of the adverse effects of climate change and broadly, resilient sewers were expected to combat this
- The verbs and wider comments allude to expectations that Thames Water needs to upgrade its sewers to better handle the issue of blocked drains
- Most of the negative sentiment was driven by the perception that at present, Thames have not performed well here, and so for a minority, the words ring hollow

The clarity is reassuring, as is the message of future proofing. Dealing with the effects of climate change is a real bonus as it gives you confidence work is being done to cope with demands.
Male, Vulnerable, ABC1, White, London

Don't see much evidence of this actually happening- around here a lot of the drains are blocked.
Male, C2DE, White, Regions

I am pleased to say that they are thinking about climate change and the problems that will occur in the future and making changes to accommodate this.
Female, C2DE, White, Regions

They want to ensure there are no leaks going forward.
Male, SEG not specified, BAME, London

We know that we are already suffering the effects of climate change. We must invest in better infrastructure too cope with severe rain fall which leads to the system suffering an overload.
Female, C2DE, White, Regions

It's good that they consider ensuring that the sewer network and storm drains are in good condition, but at the moment they have a poor track record for this.
Female, ABC1, ethnicity not stated, regions

Overall - Water and Waste Service

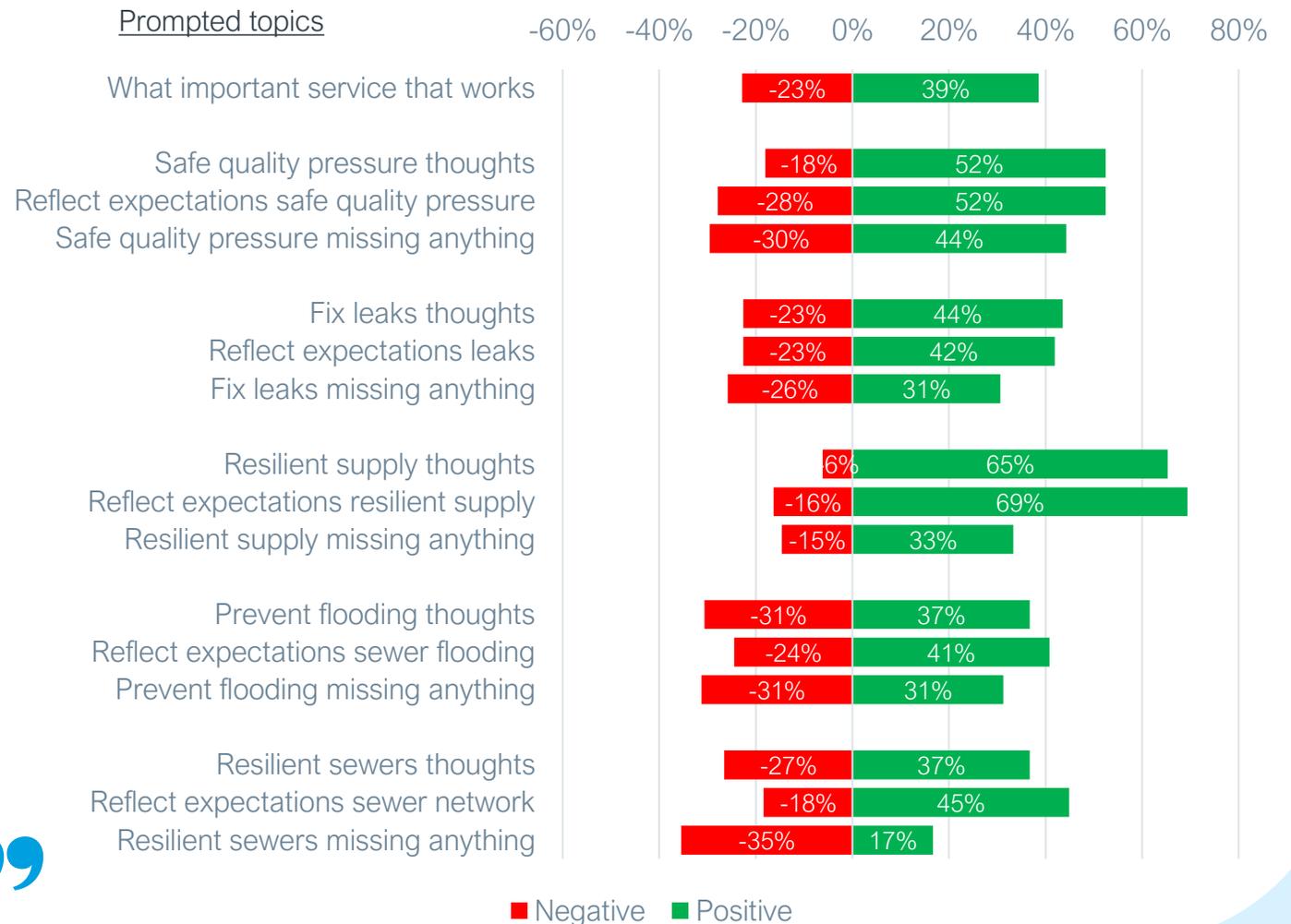
Resilience received the most positive level of sentiment

- For service that works, sentiment is lower overall than in other areas and in many instances of detail
- This is unsurprising in that it's a fundamental hygiene factor
- But overall sentiment on supply resilience is high
- N.B: The positivity displayed under 'anything missing' bar graphs (on this slide and slide 45 and 46) show the extent to which customers believe there isn't much missing here and negative sentiment represents negative sentiment that yes, important info is missing

I think TW is a one of the largest utility companies in the UK. So, it is very important they act responsibly and take their job very seriously because millions of people rely on them to provide a reliable service. I would also like leaks to be fixed much more quicker than they currently are with much less disruption to the public.

Male, C2DE, White, Regions

Service that Works: Sentiment



Environmental responsibility: overall thoughts

Commentary - community

- Overall, sentiment is 66% positive, with only 11% negative
- At the highest level, customers believe Thames have a responsibility to protect local water, and rivers
- This is reinforced by words such as ‘natural’ and ‘green’. ‘Improve’ is also widely mentioned, implying customers want Thames to do even better in this area
- Similar to the Twitter analysis, this is an area in which customers applaud the efforts being made here
- In particular, the following had the most positive traction:
 1. Green energy sources
 2. Commitment to carbon neutrality
- There was a few comments latching onto the ambiguity of how the business would achieve this, highlighting that keeping customers updated of the progress in this area is should not be overlooked

By improving quality of recreational areas too, it shows that they care about people enjoying natural scenery.
Male, ABC1, White, Regions

It sounds like they are taking these issues very seriously and should be commended in this respect.
Male, ABC1, White, London

This is great to hear that TW have ambitions for such green credentials.
Female, SEG not specified, BAME, London

Sounds good, but how much less, and in what time frame?
Female Vulnerable, ABC1, White, Regions

I welcome the steps which TW is taking to make its services sustainable and carbon neutral. It is required and organisations should invest more to achieve the outcomes.
Female, SEG not specified, BAME, Regions

I particularly like the bit about green energy sources.
Female Vulnerable, ABC1, Ethnicity not stated, London

Overall - Environmental responsibility

A healthy degree of support for expectations of the business

- There is apparent positive support across the board
- Responses are positive for seven in 10 customers in terms of their expectations of the business in this area

These are excellent ideas. using the output from sewage works in a positive way (rather than paying to dispose of it) makes excellent environmental sense.

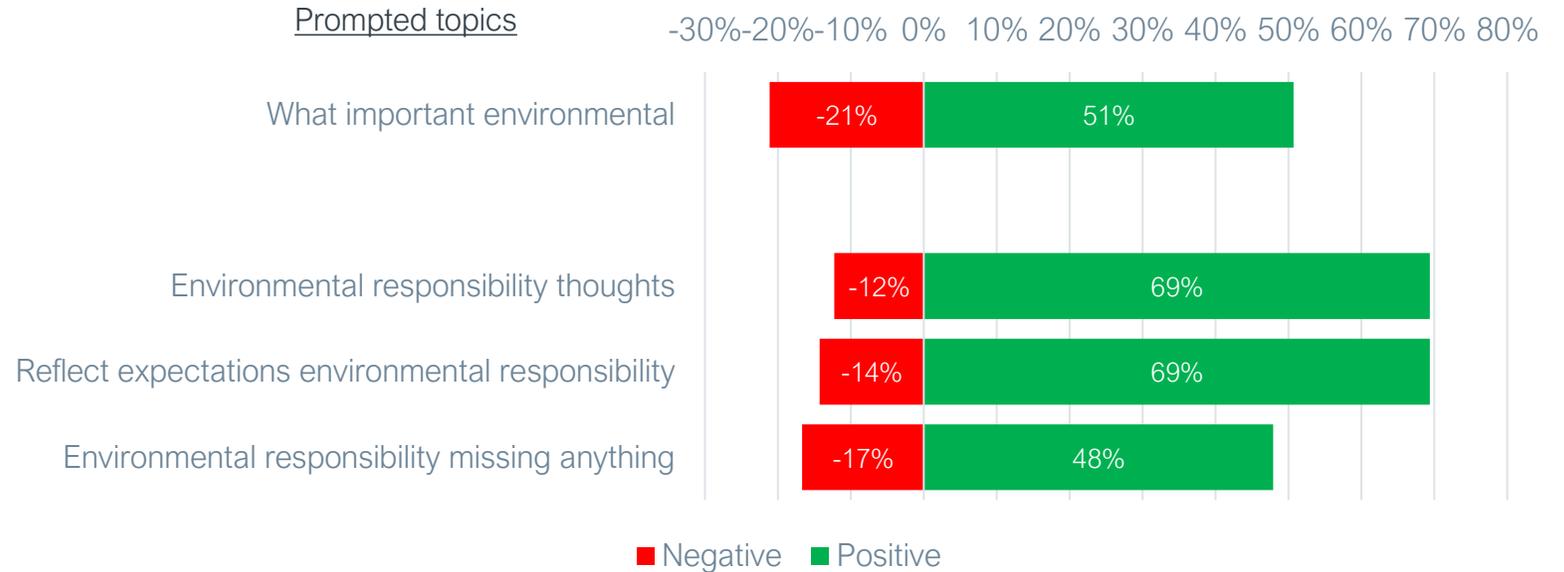
Male, ABC1, White, Regions

It is a relief to see that TW aim to go carbon neutral and also that they are willing to minimise their impact on wildlife and wild rivers.

Female, ABC1, White, Regions

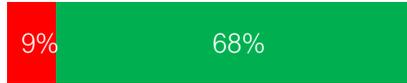


Environmental: Sentiment



Giving something back: overall thoughts

Topic Sentiment

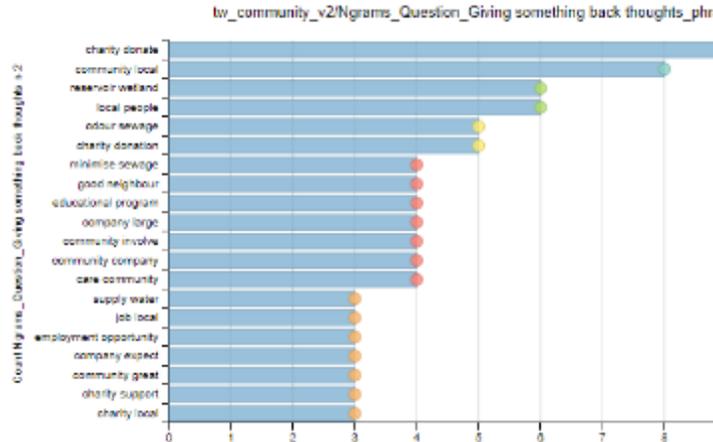


Commentary - community

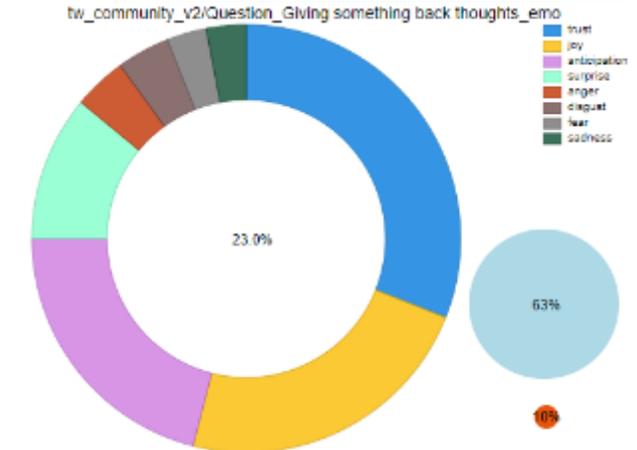
NOUNS



KEY PHRASES



EMOTIONAL SPECTRUM

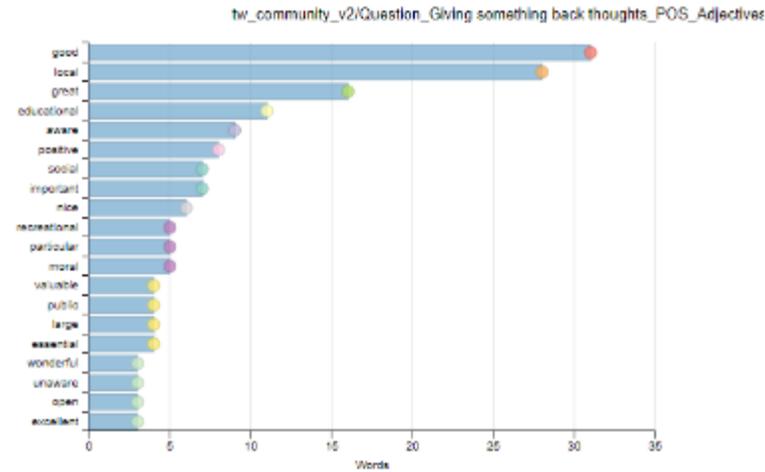


POSITIVITY
NEGATIVITY

VERBS



ADJECTIVES



Giving something back: overall thoughts

Commentary - community

- Overall, sentiment is 68% positive, with only 9% negative
- At the highest level, customers believe this is best achieved by direct donations to either the local community or a charity
- There were frequent mentions of wetlands, suggesting that protecting these areas meant a lot to people
- These commitments do a good job at steering perceptions of Thames Water towards being a socially conscious organisation
- There is evidence of widespread trust here; people assumed the contributions would be significant and would meaningfully improve local areas
- There was a few comments asking for a breakdown per area and what charities would be helped, so people could see how this would impact them and the causes they personally cared about
- The negative sentiments came from a sceptical minority, who believed these initiatives were cover stories to divert attention away from Thames Waters annual profits

Excellent goals especially with respect to recreational access. There is nothing more enjoyable than seeing the wildlife on reservoirs and in wetlands thriving and it is a great advertisement for TW.
Male, C2DE, White, Regions

I think they'll achieve what they say they are going to do. I would like to know which charities they intend to give something too.
Female, Vulnerable, C2DE, White, London

It would be really nice if this could be personalised by area... For example, I live in Hertfordshire, so would be interested in how TW are involved in my area in particular.
Female, Vulnerable, White, Regions

This is a positive step to show they care about the public and not just about profits.
Female, ABC1, White, Regions

Minimising sewage odour and local/regional roadworks clearly require a programme of preventative maintenance of the older sewers in particular throughout the TW area. Also, please add proper safety equipment to water reservoirs and wetlands.
Male, ABC1, White, London

TW is a corporate social organisation working towards well being of society.
Female, SEG not specified, BAME, Regions

Overall - Giving back

Within the giving back to the community section

- The 'giving back to the community' conversation is the most positive of all
- Customers want to see support in difficult times

It's great that they give back to the communities by donating, having educational programs and providing employment opportunities. It shows that they care about the communities that they serve.

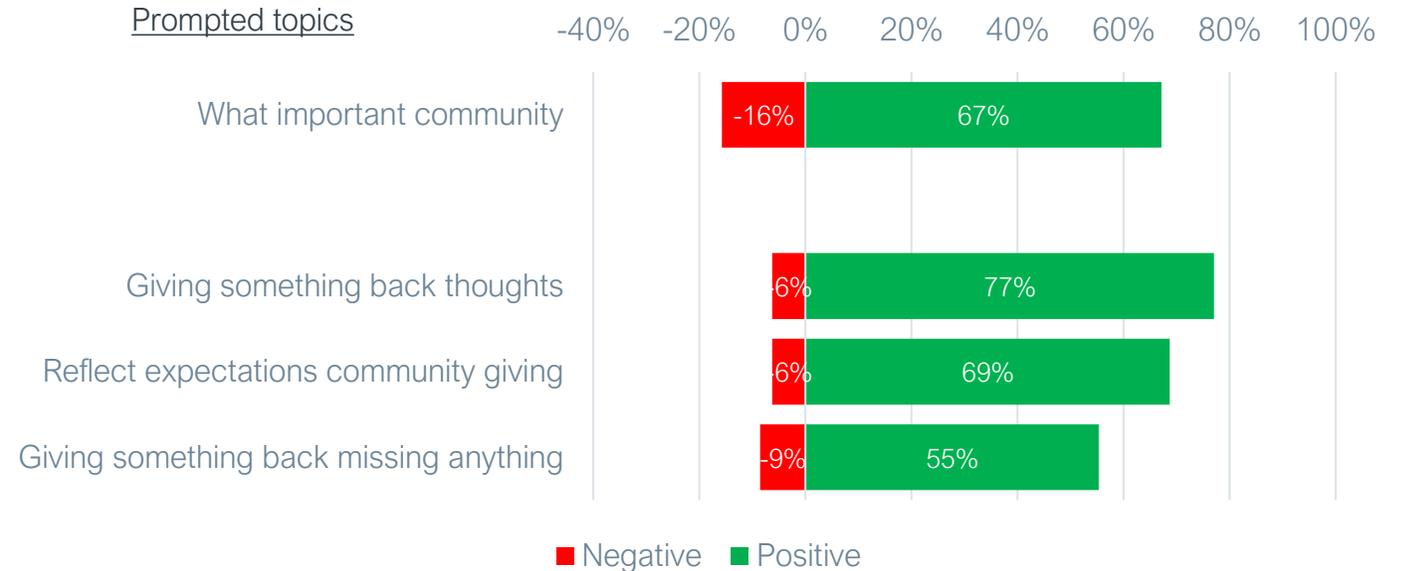
Female, ABC1, Regions

The idea of giving back to community is brilliant because that is how it could go extra mile and serve local communities. such initiatives by TW will make it more popular and moreover a responsible and people-centric company.

Male, BAME, London



Giving back to the community: Sentiment



What input do customers want in TW plans?

Commentary - community

- Overall, sentiment is 29% positive, with 14% negative
- There's a broad mix of views on this:
 - There are a number of customers pointing out they simply don't have the knowledge nor the motivation to have an input into Thames' activities
 - On the other hand, there are also plenty customers that suggest they would be happy to have their say with the possibility that it may make a difference
- This is also underpinned by a degree of pessimism from some that the political and business world has little genuine interest in what they have to say
- Some customers note that their constructive input is in using water and sewerage services responsibly

Anyone making enough of a fuss about something can make a difference if they go about it in the right way.

Male, ABC1, White, Vulnerable, London

I think that it is important for large service delivery companies to engage with their customers and what is important to their customers and to society and I like the opportunity to be involved.

Female, SEG not specified, BAME, London

I feel that my influence is more towards the planet itself by being mindful of my water usage and not to waste it.

Female, ABC1, White, London

The customer cannot control the way they receive the service.

Male, C2DE, White, Regions

I think as a customer raising my voice and encouraging others to voice their views, we can keep these issues on TW's agenda.

Male, SEG not specified, White, London

At the end of the day these companies will continue to do what they want and don't really listen to consumers, they just take our money and continue doing the bad things they are doing.

Male, C2DE, White Regions

Age shows an effect on sentiment overall

Older customers show greater negativity across the entirety of the community

- Older respondents are distinctly more negative in tone through the community – a strong pattern of more negativity as age rises
- This is specifically driven by older male respondents

Evidence please- all the evidence about sewer flooding is negative.

Male/65+, C2DE, White, Regions

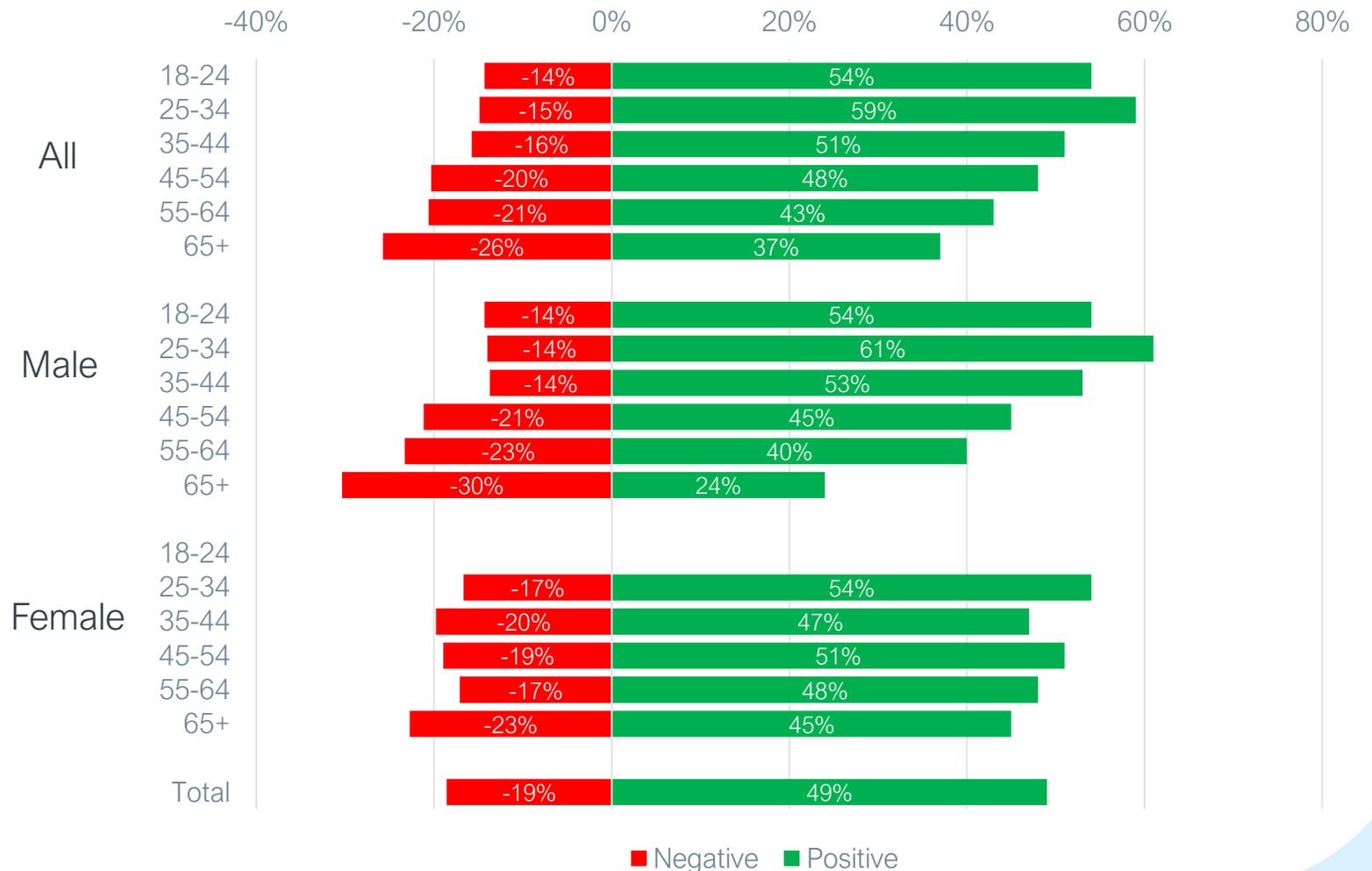
Demonstrate what you are actually doing to educate me.

Male/65+, C2DE, White, Regions



- Other elements do not vary – for example, vulnerable vs non vulnerable customers or ethnicity

Age x Sentiment



SEG also has an effect on negativity

In combination with age, lower SEGs has an increased impact on negativity across the entire community

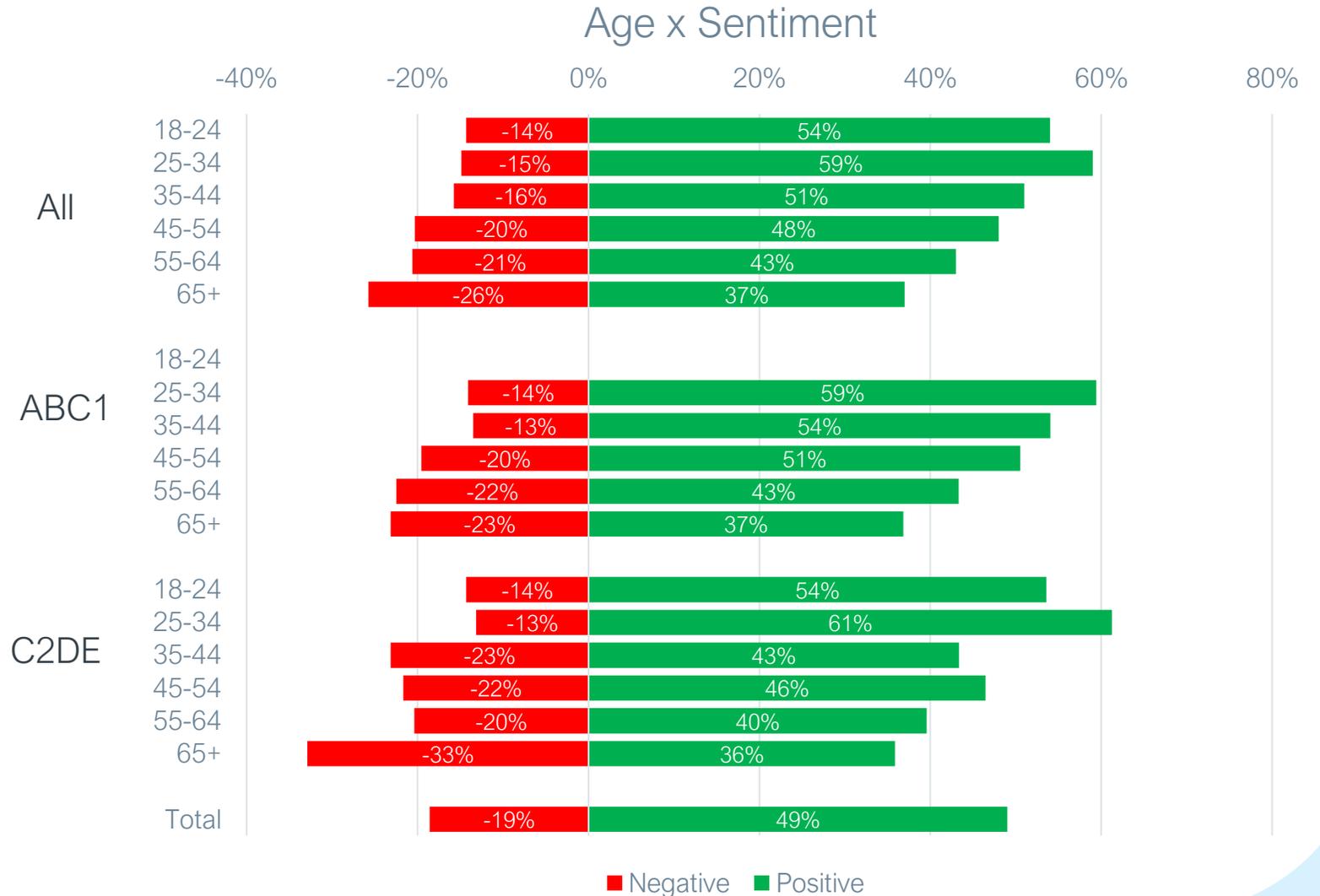
- The age differences are also most marked amongst lower socioeconomic groups C2DE
- These groups are also more negative with their comments

Instead of billing people by postcode, actually going more by how many people are in the household.

Female C2DE, White, London

It does read a bit like a wish list of things that aren't really happening at the moment, rather than something that's been planned out. It's very woolly.

Male, C2DE, White, Regions



The business narrative

There are no clear differences highlighted in terms of what businesses need or expect from Thames Water

- Customers that own businesses or that dealt with Thames Water as part of their job were asked whether any of their given views differed from a business point of view
- The most common response was that business needs are effectively the same as domestic customer needs
- Some customers reported issues with sewage flooding at a business premises, but these were resolved satisfactorily
- One customer notes that Thames Water's response times on removing graffiti from assets was not up to their expectations

I am a sole trader working from home so I am responsible for my own water and bills..
Male, C2DE, White, Regions

Businesses are not really different from the householder in that need both an ample supply of water and decent sewerage/floodwater controls..
Male, ABC1, BAME, Regions

No, because in both instances the parties responsible for paying the water bill are customers and as such they expect an uninterrupted water and waste water service from and efficient, responsible and competent [organisation].
Male, ABC1, White, London

My company had sewage problem and it was quite bad experience, but however its resolved now.
Male, ABC1, NS, London

We had sewage overflow from the manhole. ... the contractors turned up and unblocked with rods. They were polite, quick and efficient..
Male, ABC1, White, London

When I was a graffiti officer, I was sometimes frustrated how long it took Thames Water to remove graffiti. Also, working with young offenders.. it was frustrating to see the amount of rubbish in rivers and streams.
Female, ABC1, White, London

Q. Is there anything that you have told us that you would answer differently from the point of view of your role within the business e.g. is there anything more or less important to you when thinking about Thames Water and the issues discussed. 16 customers that run a business or that deal with Thames Water as part of their job



Appendix

Customer Voices Screener



Scripting specifications		
Job code	5720	Project (wave/stage if applicable) Community 1 (Wave 1)
Market and Languages	UK	
Sample source	<input checked="" type="checkbox"/> Panel <input type="checkbox"/> Client List <input type="checkbox"/> 3 rd Party <input type="checkbox"/> Open link	If 'Client List', specify pipe ins
Sample criteria	Aim to be sent out to all members of panel – n= as many as possible	
Appended segments	Age; Gender; Ethnicity; Vulnerability; Income; Metered/Unmetered, Location, WRZ/Non-WRZ	
Invite text – provide text for both Panel, Client list sample sources and reminders		
Subject line	Share your thoughts with Thames Water. New research live now!	
Pre header	We want to hear from you	
Dear <INSERT [Mr / Ms] SURNAME>,		
<p>Following our email on Friday, we have a new research activity going live shortly, and we'd love for you to take part!</p> <p>This research involves taking part in two research communities (the first over one day, and the second over two days) to share your thoughts with Thames Water about your views, needs and priorities for their service.</p> <p>We want to give you the opportunity to help Thames Water develop its Business Plan for 2025-30. This plan will set out what they need to do for customers in the future (as well as right now), and any investments they'll need to make to achieve that. It's a real chance to make a difference to their activities and services.</p> <p>The first online community will take place on xxxx and the second will take place on between xxx – xxx. If you are available, you will need to spend around 30 – 40 minutes to complete a range of different activities per day. You can complete the activities at a time and place that suits you.</p> <p>For those who complete all the activities, you will receive a £30 Voucher Express voucher as a thank you for your time.</p> <p>Anyone on the Thames Water Customer Voices Community can take part so register your interest by 12:00PM on Friday 1st October by clicking the link below.</p> <p>Click here to register your interest.</p> <p>Many thanks,</p> <p>Lucy Thames Water Customer Voices Community Manager</p>		

ASK ALL

Q1.

We would like to invite you to take part in two online research communities on xxx and [xxx](#) – xxx.

You will be required to complete 30 – 40 mins of tasks per day, but at a time and place that suits you, and to respond to follow-up questions sent by our moderators. These tasks will include individual activities and



possibly group discussions, some of which may require uploading photos and videos, that will be used for research reporting only.

We are offering £30 incentive as a thank you for the completion of all the tasks and responding to our follow-up questions.

Please note, your email address will be shared with Further, [in order for](#) you to be invited to join the online communities. Comments, activity results, [videos](#) and images you choose to upload/share during the community will be held on the Further platform. [Privacy policy link]

Are you happy for us to share your details with Further and in addition share any video and image content you share with Thames Water for research purposes only?

SINGLE CODE

1. Yes, I am happy for you to share my details and any video I upload
2. No, I am not willing for you to share my details and any video I upload– please know this means you will not be able to take part in this activity. **SCREENOUT**

END MESSAGE:

Thank you for completing this survey. Your interest has now been registered and we will get in touch with you shortly to provide details of the research activities.

Look forward to speaking to you soon!

The Thames Water Customer Voices Team

[\[ALL DEMOGRAPHIC SPLITS ADDED TO SAMPLE FILE FOR SELECTION PURPOSES\]](#)





Appendix

Customer Voices Community Questions

Stage 2: unprompted Thames Water 'in the round' questions

Introduction: the first stage of this Customer Voices panel research is to understand customers' unprompted views of Thames Water and four key areas in which it operates. This is to understand the issues of most importance to customers, prior to more detailed and prompted questioning in the second community session.

Objective: understand spontaneous views of what customers want and expect of Thames Water

1. Please tell us a little bit about yourself – where you live, whom you live with and what you enjoy doing in your leisure time
2. When you think about Thames Water, and all the activities you are aware that they are involved in, what do you really want from Thames Water? What things are most important to you?
3. How does Thames Water compare to other service providers that you use for things such as gas, electricity, internet, etc?
4. What else do you expect from Thames Water? How should they conduct themselves when going about their activities?

Understand what family, friends, neighbours and other social network think about/are saying about Thames Water

We'd now like to explore some of the things that you see and hear about Thames Water.

1. Do you ever talk to others (family, friends, neighbours) about Thames Water? Or have you heard things about Thames Water from others? What have you told others about Thames Water or what have others told you about them?
2. What have you heard or said about Thames Water on social media (e.g. local Facebook pages or on Nextdoor). What kinds of things are people talking about that you think Thames Water should hear?
3. What have you heard or read about Thames Water in the mainstream media (e.g. newspapers/newspaper websites or TV news)?

Understand what is important to customers in terms of ‘service that works’, ‘environmentally responsible practice’, good customer service’ and ‘giving back to society and the community’

- Before we move on to the final question for the day, we’d like to hear about what is important to you across four specific areas of Thames Water’s activities.
- For each of the following, please tell us what is important to you and what you’d like to see from Thames Water:
 - ‘Environmentally responsible practice’ i.e. how Thames Water takes the environment into account in all of its activities
 - ‘Good customer service’ i.e. how Thames Water treats its customers in its dealings with them
 - ‘Service that works’ i.e. how Thames Delivers its water and wastewater services to customers
 - ‘Giving back to society and the community’ i.e. what Thames Water does that can impact on or support local communities and society more broadly

Understand the areas in which customers feel they can meaningfully have an input and where they think they are less able to comment constructively

- Having had chance to think about Thames Water and its activities, in which of the following areas would you most like to ensure Thames Water listens to your opinions?
 - ‘Environmentally responsible practice’ i.e. how Thames Water takes the environment into account in all of its activities
 - ‘Good customer service’ i.e. how Thames Water treats its customers in its dealings with them
 - ‘Service that works’ i.e. how Thames Delivers its water and wastewater services to customers
 - ‘Giving back to society and the community’ i.e. what Thames Water does that can impact on or support local communities and society more broadly
- And are there any of the following areas in which you do not want to or feel that you can’t have much input?
- Finally, of all the things you have talked about, what is the one thing that is most important for you to tell Thames Water?

Stage 3: prompted Thames Water 'in the round' questions

Introduction: Previous activities will have sought spontaneous feedback, and this activity builds on that by prompting on a full spectrum of issues related to our service (based on Sia Partners recent assessment of 'What Customers, Communities and Stakeholders Want', as well as our 2050 Vision).

Panelists will see each of the following issues in rotation and be asked to respond to the following questions:

For each of the issues you are about to see (there are 10 in total), please answer each of the following questions. We are hoping to see 50-100 words for each individual question

1. In terms of *ISSUE*, Thames Water aims to achieve the following - now and into the future. Please take a read through the points below and tell us your thoughts on what you have read
2. Do these points reflect what you get or expect from Thames Water in terms of *ISSUE*? To what extent do they achieve this would you say?
3. Is there anything missing from these points in terms of *ISSUE*? What else could Thames Water be doing in this area – now and into the future? (please bear in mind there are other areas for you to comment on, so please stick to *ISSUE* in this answer)

1) Great customer service

- Thames Water will do what it says it will. Whether to do with water, waste or customer service, this means fixing leaks, fixing issues at my property, responding to billing queries or anything else that I have a problem with
- Thames Water will do this quickly and promptly. They will turn up on time, they will respond to queries quickly, and they will fix problems and resolve queries to my satisfaction first time
- I can get in touch with Thames Water in the manner in which I choose and I will find the information I need, or there will be a team member to help, at a time that suits me
- I can easily access my bill and the information I need about my account, and it is all easy to understand and act on

2) Treat me as an individual

- Thames Water will treat its customers as individuals and will provide a friendly and empathetic service
- If I have a problem, they will listen carefully and understand the circumstances I am facing, and act accordingly
- If I have any particular challenges, such as financial issues or health needs, they will acknowledge this and ensure that I have the right kind of support in my dealings with them and the services they provide

3) Bill affordability

- My Thames Water bill is affordable and is one I am happy to pay in return for the services I receive from them
- The bills I receive are accurate and consistent, with no big surprises
- Any rises in the bill are communicated clearly, as well as any reasons for their increase
- Special tariffs are available and accessible for those that are struggling to pay their bills

4) Constant, safe, high quality, good pressure water

- Thames Water looks after the water network (pipes and treatment works) in a way that keeps repair works and supply interruptions to a minimum – so I have a constant supply of water
- The water that comes out of my taps is always of the safest quality for drinking, and looks, smells and tastes of the highest standard
- Thames Water works hard to fix and minimise customers' experiences of ongoing low water pressure

5) Fix leaks

- Thames Water works hard to fix leaks when they occur
- Thames Water's approach to fixing leaks shows that they care about the importance of our water supply

6) A resilient water supply for the future

- Thames Water is putting plans into place to help ensure we have a safe and plentiful supply of water into the future, meeting concerns such as climate change, extreme weather and a growing population
- This includes upgrading the water network (pipes and treatment works) for the long term
- Thames Water also aims to reduce leakage and educate customers on how to save water, before looking to find new sources of water from the environment

7) Prevent sewer flooding

- Thames Water works hard to reduce the risk of sewage flooding into homes, gardens and businesses
- This includes helping to minimise the blockages that can cause sewers to back up and overflow
- Part of this involves educating customers on what can be put down toilets and sinks

8) A resilient sewer network for the future

- Thames Water looks after the sewer network and storm drains to ensure that they are in good condition and have capacity to cope with demand in the face of climate change and a growing population
- This means ensuring that they can prevent sewage overflows into rivers

9) Services provided in an environmentally responsible way

- Thames Water will reduce strain on the environment by taking less water from vulnerable sources like chalk streams (a rare type of river)
- Thames Water aims to improve the quality of rivers that have been at risk of pollution from sewage overflows, to bring those rivers up to standard for wildlife, for recreation, fishing and swimming
- Thames Water will increase its use of green energy and generate more of its own renewable energy such as extracting power from poo, solar power and wind turbines on its sites. This will help Thames Water to reach its target to become 'carbon neutral'

10) Giving something back to the community

- Thames Water acts as a good neighbour by giving something back to the communities in which it operates
- This involves activities throughout the Thames Water region, such as donating to charities, educational programmes, providing employment opportunities for local people and allowing recreational access to its reservoirs and wetlands
- It also means minimising the impact of things like sewage odour and roadworks in local areas

Q1 1 Finally...

- Are you involved in paying the bill or dealing with Thames Water for your job?
 - If so, do you have anything to add on the 10 issues we've just looked at, from your business perspective?
- A reminder of the 10 issues:
 - Great customer service
 - Treat me as an individual
 - Bill affordability
 - Constant, safe, high quality, good pressure water
 - Fix leaks
 - A resilient water supply for the future
 - Prevent sewer flooding
 - A resilient sewer network for the future
 - Services provided in an environmentally responsible way
 - Giving something back to the community

Q12 Finally...

- Which of the topics that you've been commenting on are the most and least important to you? Please rank them in order of importance to you personally
- Great customer service
- Treat me as an individual
- Bill affordability
- Constant, safe, high quality, good pressure water
- Fix leaks
- A resilient water supply for the future
- Prevent sewer flooding
- A resilient sewer network for the future
- Services provided in an environmentally responsible way
- Giving something back to the community
- Finally, are there any aspects of Thames Water's service that we've missed out, that you'd like to make a comment on?

Script used for PR24 Foundation ethnographic exercise

- Over the course of the week, we want to hear from you about how water fits into your world, both inside and outside the home.
- Each day you will receive an email that will tell you all about how to record and submit your video. You do not have to record every day but do aim for around 10 minutes in total. You may want to think about covering different topics on different days – but that is up to you.
- So, the focus is on you and your family and the role of water, *as well as* how Thames Water fits in. You can tell us about anything you like, be it your water supply, your wastewater, billing, customer service, roads and rivers – but we don't want to be prescriptive, so start with what is important to you.

Script used for brand strategy ethnographic exercises

- What's the **minimum you expect** from Thames Water to be **happy** with their service (e.g. water supply, waste water removal, customer service and communication etc.)? And what do you expect from Thames Water **over and above that** (e.g. protecting water resources and the environment, corporate social responsibility, positively contributing to communities etc.)?
- Please record a very short video (up to 45 seconds) of yourself answering these questions starting with the phrase "I expect Thames water to..."