



7120 Water Resource Management Plan – Thames Water

Qualitative findings

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VERVE
Energising Insight

Contents

1	Executive summary	3
2	Background	6
3	Objectives	6
4	Methodology	7
5	Sample	8
6	AI Analysis	9

Main findings

7	Attitudes towards water resources in the Thames catchment	10
8	Protecting the environment by reducing water abstraction	13
9	Making the most of available water	18
10	Proposed investment – new sources of water	23
11	Bill impact	32
12	Summary	33
13	Appendix	36
	Discussion guide and stimulus (36)	
	Screening Questionnaire (56)	
	Ignite AI (61)	

1. Executive summary

There is a growing awareness of water shortages in the Thames Water area (due to hot weather experienced in 2022 that led to a hose pipe ban), however there is work to be done to educate customers on the risks they face if no investment or interventions are put in place.

Climate change and recent experience of water shortages in summer 2022 has made water shortages a more top of mind concern, but the extent to which climate change, population growth, and a need to reduce harm to the environment are impacting the existing water supplies is not widely known. The concept of the Thames Water area running out of water does not feel realistic until people are presented with the challenges that the catchment faces.

Being educated on the challenges facing the Thames Water area meant that participants were largely in favour of the plan and that timely action needs to be taken to ensure we continue to have a secure water supply.

There was no scepticism about the risks presented to the water supply and no one questioned if the forecasts were accurate. Throughout the research, there were high levels of trust towards Thames Water and the technical work carried out to create the WRMP.

"There is a huge risk to our water supplies if we don't take action now! We should begin to make changes immediately!! The benefits of taking action now are clear - we must plan for the future to reduce risk!! - There are no discernible risks of taking action now - it must be a major priority to safeguard future supplies!! - The challenges above are definitely achievable with everyone on board (the public and the Government too)! - Cannot see any benefit at all in waiting to take action at all - and if Water Bills need to go up, so be it!!!" **Male 55-64 White, Business customer**

Despite the support for the plan, **there is resistance to contributing financially** especially in this time of economic uncertainty. This is a majority view within this sample either due to worries about the increasing cost of living or because they had heard that Thames Water were paying large bonuses to employees and shareholders. Putting the burden of cost on the customers is seen as unfair.

Protecting the environment by reducing water abstractions split views. Although in principle all would like to reduce harm done to the environment, many are facing financial difficulties and worry about the bill impact.

It is felt that the financial burden should be carried by Thames Water (through reported profits and reducing pay-outs to shareholders) and by the Government. It is understood that Thames Water is not Government funded, however the Government and local

authorities are responsible for the environment and therefore should financially support environmental initiatives.

Although there is nuance between customer types and demographics, the overall feeling towards ensuring the future of water resources in the Thames Water area was that action should be taken sooner rather than later despite the likely disruption and bill impact.

In principle, all participants would like to see more done to make the best use of our existing water sources. They would like to do their bit by reducing their own consumption. However, behaviour change is difficult and so encouraging actual reduction in usage at scale will be a challenge. Locating and reducing leaks on people's properties is seen as a productive way to save a significant amount of water. Around a quarter of customers would like to see more commitment from Thames Water to reduce leaks that on the Thames Water network and feel the targets (halving leakage by 2050) are not ambitious enough to make an impact. Those who feel the targets are fair recognise that London in particular is a challenging place to make improvements to and that minimising disruption is a realistic consideration to the overall plan.

Investing in new water sources is seen as necessary and there is support for investment. There is little opposition to the new river abstraction at Teddington or the new reservoir in the Upper Thames catchment. Both are thought to offer an environmentally friendly solution that is good value for money. There is more opposition to the Severn Thames Transfer due to the scale and complexity of the project, as well as the perception that the scheme may shift the pressures on water resources elsewhere.

In the current financial climate, **there is little enthusiasm for bill increases**, however there is strong support to plan ahead and ensure we have a secure and sustainable water supply for the future. Customers feel it unfair that the burden of cost should fall on them especially with reports of Thames Water profits. There is also a sense that environmental initiatives should be funded at least in part by local authorities and central Government. This is particularly true if they do not live near the impacted areas and therefore would not necessarily benefit from the improvements.

Regarding securing new water sources, participants feel more comfortable supporting bill increases for initiatives that are thought to be low risk to the environment and have a stronger likelihood of success. For this reason, the plan for a new reservoir is the preferred of the three investment plans as the concept is understood and reservoirs are regarded as positive natural spaces that have many environmental benefits.

The Severn Thames transfer has the least support as it is seen as the most ambitious and considered to be the most likely to fail. Concerns include lack of support from the affected regions, challenging building requirements and reliance on other regions having enough water to share with the Thames Water catchment.

Using the AI tool, the sentiments across the different groups can be identified. There is an overall positive response to the plan and general agreement that taking action to secure a reliable water supply for the future is needed.

Although there is a general consensus, there was a difference of priority by age group. Younger respondents were more likely to mention the environment and climate change whereas older respondents were more concerned with infrastructure (i.e. sewage and leaks).

This difference in focus can be found throughout with younger people more likely to focus on the impact of the plan on the natural world and favouring solutions that are low carbon. Whereas older people were more likely to focus on the practicalities of solving the issues such as how Thames Water could reduce leaks more quickly.



Fig 1: Most important WRMP topics by age group as identified by Ignite AI. Younger participants are more likely to mention the environment whereas older participants are more likely to focus on upgrading the networks (i.e., leaks and sewage)

2. Background

The Water Resource Management Plan (WRMP) looks at the challenges facing water resourcing for the next 50 years to 2075. These challenges include a growing population, changing climate, and protecting the environment, which all have the potential to create water shortages if not properly managed in the foreseeable future.

Measures to ensure a consistent water supply for future generations include tackling leakage, reducing the demand, and finding new sources of water. There are different ways these solutions can be implemented, each with their own challenges and costs, and these have been explored in detail in collaboration with other water companies within the South East.

These solutions have been explored without artificial boundaries; however, Thames Water is required to consult their customers on the plan to ensure the solutions proposed are acceptable, especially because of the potential effects these measures might have on the environment, local communities as well as the bill impact for customers.

3. Objectives

Consultations are often completed by those who are very engaged with the issues, either because they are part of an organised group or because planned developments will directly impact where they live. But as such, they are not always representative of the general population and the objective of this research is to ensure voices from the Thames Water catchment area, that are representative of Thames Water's customer base, are heard and considered in refining the draft plan

In addition to the consultation questions, customers were also asked to consider the following as part of the research:

- How acceptable is the WRMP to the wider Thames Water customer base?
- Do customers feel the plan is fair and proportionate or do they feel the forecast is inflated?
- If customers feel the forecasts have been inflated, what is driving this belief?
- What are customers attitudes to the threat of water shortages in the future versus the need for development and investment now?
- How do attitudes differ between people with an environmental outlook vs. those who prioritise lower bills or limited disruption to their local areas?

- What impact does the perception of TW, and specifically current performance such as leak management have on views for the WRMP?

4. Methodology

A robust qualitative methodology was chosen to feed into the wider consultation on the WRMP.

The research was conducted using a digital pop-up community which was used to share information from the consultation with customers, allowing them to provide their feedback in a way that is secure, intuitive, and flexible.

A digital pop-up community is an accessible tool that can be accessed on a mobile, tablet, or laptop. Participants can take their time on the activities to fully understand the materials. By engaging with the materials participants gain knowledge on the topic at hand at their own pace and by doing this, feel empowered to give their informed opinions on the topic. Pop-up communities ensure more engagement from participants as it is a live system, enabling the moderators to probe the participants on responses given.

The community was open for 10 days in total with 5 days of activities. The community was live from Monday 13th March until Thursday 23rd March. Each day, participants were asked for their initial view on an aspect of the WRMP before being presented with information from the consultation. The information was designed to be customer friendly, using plain English and with clear examples to illustrate any technical aspects of the plan (for example, 1 billion litres of water was explained by the number of baths that equates to, etc). The approach was shared with the Thames Water Customers Challenge Group including all materials. Their feedback was used to design and implement the research.

The information was given to participants as a PDF and as an audio file in order to make it accessible to all. All research materials can be viewed within the appendix of this report.

Participants' initial and subsequently informed views of the WRMP were captured throughout. Their responses were kept private to avoid any influence, apart from the final activity where participants were invited to discuss their views with each other.

The discussion guide followed the consultation as follows:

- **Day 1:** Why a Water Resources Management Plan is necessary which included details of how much water people typically use daily and the challenges we face (e.g., climate change, population growth, and increasing droughts).

- **Day 2:** Protecting the environment – information explaining what abstractions are and why Thames Water want to reduce abstraction at some sensitive watercourses to protect the environment.
- **Day 3:** Using water wisely – how water can be saved through reduced usage at home, more smart meters, government led actions such as changes to building regulations and reducing the amount of water that is lost through leaks both from Thames Water’s water network and also from customers’ own water pipes.
- **Day 4:** Proposed new water supply schemes – A new abstraction in west London supported by water recycling, a reservoir in Oxfordshire, and a transfer from the River Severn, supported by other sources of water as well as some smaller new water supply schemes.
- **Day 5:** Bill impact and overall view of the plan.

5. Sample

While this was qualitative research, Thames Water required a robust evidence base and an ability to understand subgroups with granularity. We aimed for 100 participants to take part but with over-recruitment we had 123 participants complete all the tasks.

- 100% of the sample were both dual water and wastewater customers.
- 88 respondents were Household customers, 10 respondents were Future Bill Payers and 25 were Non-Household customers or business customers
- Non-Household customers included a spread of business sizes and types
- Future Bill Payers were aged between 18 and 24 years old

The breakdown of household/future household customers who took part is as follows:

Demographic (Household n = 98)	% Attended	% TW customer profile
Male	51%	49%
Female	49%	51%
18-24	16%	18%
25-34	18%	18%
35-44	18%	18%
45-54	22%	18%
55-64	19%	12%
65+	7%	16%

Demographic (Household n = 98)	% Attended	% TW Customer Profile
ABC1	70%	62%
C2DE	30%	38%
White	67%	74%
BAME	33%	26%
Vulnerable	9%	14%
Non-vulnerable	91%	86%
London WRZ	80%	78%
Thames Valley	20%	22%

Although efforts were made for the sample to fully reflect the Thames Water catchment (by over-recruiting and incentivising participation), we had lower representation from respondents aged 65+, C2DE and vulnerable customers.

Participants were recruited from the Thames Water community Customers Voices, or were recruited by a trusted recruitment partner. All participants were selected after completing a screening questionnaire to ensure those taking part were representative of the Thames Water catchment.

6. AI Analysis

Ignite AI (an artificial intelligence tool) was used in conjunction with human analysis from our research team. Ignite AI was used to decode the content from the pop-up community at scale, identifying the intrinsic properties of responses such as sentiment and emotionality. It also allowed us to cluster commonalities among respondents and visualise key themes across subgroups. Ignite AI ensures the views of the full sample are taken into account in a consistent, objective manner, without human bias.

Main Findings

7. Attitudes towards water resources in the Thames Water catchment

Prior to seeing any information on the WRMP, participants were asked how necessary investing in ways to protect water supply in the Thames area is.

Participants think the biggest threats to the water supply are old Victorian infrastructure, population growth within the area, lack of infrastructure leading to sewage contamination of rivers, climate change (with many participants referring to the 2022 heatwave, prolonged droughts, and increasing temperatures), and household water-wastage. The most mentioned ideas on how to protect the water supply were to replace water systems in areas most affected by old infrastructure, education on how to save water, re-using treated water (water recycling), and hose pipe bans.

Having recently experienced a hose pipe ban, customers accepted that these may be a more frequent occurrence in the future. Although not ideal, it is seen as a necessary precaution in the event of water shortages.

Participants had some awareness that our water resources are under pressure, and felt it is important to invest for the future. However, some participants were unaware how this issue will impact them individually and link the issue more broadly with climate change. These feelings and sentiments are mirrored in the AI data, which shows the four most common phrases from this day of the research are “change climate”, “big threat”, “future supply”, and “protect supply”.

*“The biggest threats to water supplies are leaks, contamination, and drought. To protect the water supply, we must protect our water sources.” **Female, 18-24, White, Future Bill Payer***

Participants were then given information on how much water is used in the London/Thames Valley area, the importance of water to society, the environment and the economy, and London’s rainfall in comparison with other capital cities. The amount of water needed in the Thames Water area was not considered surprising as London is densely populated. However, many were previously unaware at how little rainfall London gets when compared with other capital cities, like Rome and Sydney. After being shown this information, participants expressed a need to raise consciousness of water usage, and that action is needed to futureproof water supplies. Ignite AI showed the 35-44 and 65+ age groups were the most surprised.

"I understand from this information that it is vital to protect and preserve our water supplies. I was surprised just how little rainfall London gets. I had no idea how low this was! After reading this I'm quite concerned about our existing and future supplies and how the increasing demand for water will impact London." **Male, 18-24, White, Future Bill Payers**

Participants were then shown high level information on the WRMP. After reading this information, participants were more aware that Thames Water have a legal duty to provide water to households and businesses and are somewhat reassured that a collaboration with other water companies would mean an improvement in water management and taking responsibility to better secure water supplies.

"I had no idea there was a 50-year plan and that Thames Water were working with other water suppliers, so that there is a collaborative, coherent plan for the whole region. It makes me feel reassured and hopeful." **Female, 55-64, White, Household Customer**

Finally, participants were shown stimulus on the challenges faced to secure our future water supply and were asked to share their thoughts on the risks of not acting now, the benefits to waiting, and the benefits to acting now.

Participants think the risks of not acting now are not having a secure water supply for the future, the problem worsening, and being placed in an irreversible position. Participants felt the risks of acting now were disruptions to current services, increased bill costs, and general concerns on whether the current solutions are sustainable and whether their long-term implications are known. The overall feeling was action should be taken sooner rather than later despite the likely disruption and bill impact.

"Urgent planning and action is needed in order to meet future demands, not just from Thames Water but also politicians and industry as well as individuals (life-style changes) so we can minimise our use of this precious essential resource." **Female, 55-64, White, Household Customer**

"I don't think there any risks to taking action now except some minor inconveniences. But there are much more dangers if action is not taken now." **Male, 45-54, White, Non-Household Customer**

From the Ignite AI tool, we can see the emotional response to the challenges faced and it shows a great deal of fear of the possible consequences. Many use sentiments that reflect trust in the information they are receiving and anticipation of what solutions they will be presented with.

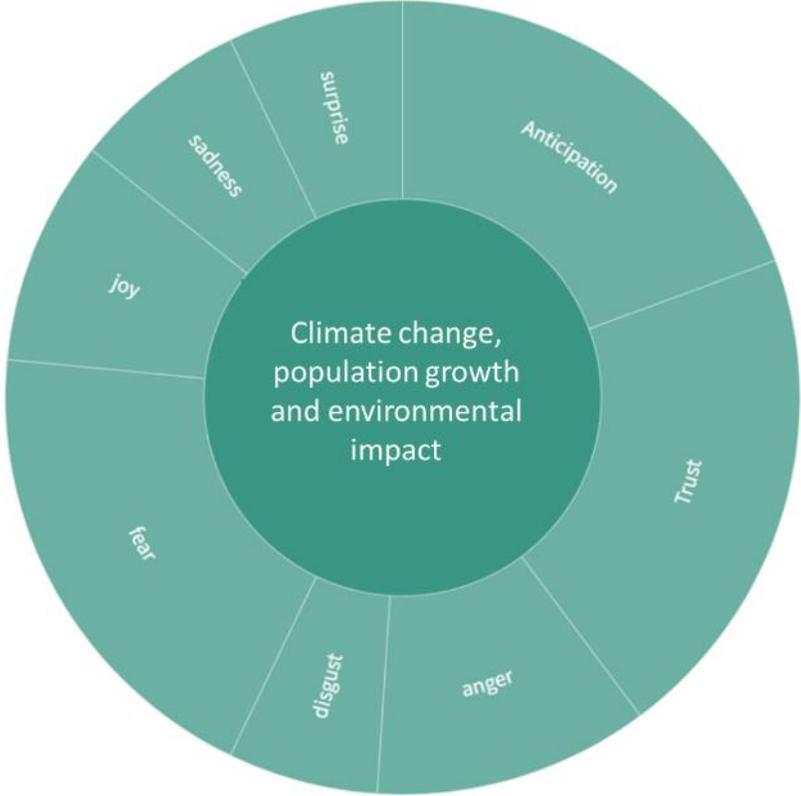


Fig 2: The Ignite AI tool identifies and codes emotional responses into 8 different emotions. In response to Climate change, population growth and environmental impact, the emotional responses are largely negative however trust and anticipation are prominent which indicates a positive mindset towards change.

8. Protecting the environment by reducing water abstractions

Participants had a basic understanding of the water cycle but were largely unaware of the abstraction of water from the environment – rivers and groundwater – prior to reading the information on this. Therefore, there was a lack of understanding of the pressure that abstractions can have on the environment.

Some participants (generally the over 45s) had a more technical understanding of environmental issues, particularly rivers, whereas other participants (under 35s) were aware of how pressing more general environmental challenges are. Lastly, participants felt more informed of what Thames Water is doing as for most, this was not a topic they were familiar with.

What do they think about the plans to reduce water abstractions?

Participants were presented with information about where their water supply comes from including the abstraction of water from rivers and groundwater, and that abstraction from some watercourses is not sustainable and should be reduced or ceased to protect the environment. Overall, the response was positive after reading these plans as they perceive them to be credible and some participants were surprised by the “well thought out approach”.

Collaboration with the Environment Agency, as well as other water companies, brought a level of reassurance to participants (especially Non-Household customers) as it is seen as a trustworthy body that specialises in prioritising the environment. Similarly, participants felt positively towards this information as it demonstrates there is action being taken to protect the environment. Yet the matter of responsibility was often questioned by some (particularly 45+) who felt environmental challenges are a broader issue and that some problems are more to do with infrastructure. This caused participants (over 45s) to feel the Government should be more involved in mitigating these issues, as well as sharing the burden of cost implications.

“Hopefully Government will help by reducing red tape to get this on the go as soon as possible, increasing sources of water and reducing abstraction from natural sources.” **Male, 55–64, White, Household Customer**

Many participants didn't know what an abstraction was and the impacts it has on the environment. Furthermore, all participants are keen to protect the environment on some level and acknowledge reducing abstractions will have a positive effect not just on wildlife, but also toward the wider community. Case studies like the River Kennet and the River Og resonated well with participants, allowing them to see what abstraction reduction looks like in real life.

Reducing abstractions is perceived to be something that Government and local authorities should be involved in as well as Thames Water contributing from profits as these are perceived to fall outside the supplier/customer contract of supplying clean water and disposing of waste. The onus is on Thames Water and the Government to ensure no environmental harm is done and therefore the cost of this should not be placed on the customer.

"What I want to see and know is Thames Water itself is contributing to this/these costs by acting responsibly as a business, and a very rich one, by the company reducing its profits and the Board of Directors reducing e.g., salaries and/or stock options in order to pay for this. It absolutely gets my goat when major, and very rich, utilities companies ask customers to contribute to costs such as these by paying more, when the companies and their Boards don't do their bit as well." **Female, 45-54, White, Non-household customer**

"Water is essentially a monopolistic commodity, no matter how many water companies there are, the infrastructure is ultimately controlled by one company I would argue that a major part of this funding should come from reduced profits to the water companies, as years of neglect and wasteful mains leak have an out-sized contribution to the dilemma we're in." **Male, 35-44, BAME, Household customer**

"I think the prioritisation of the environment and the forward thinking element is positive, and it's good to read about positive impact that has already been had. However, I think the cost of this coming from the individual/ household is unfair, and should instead be coming from businesses, Government grants, taxation etc." **Female, 25-34, White, Household customer**

Although the reduction in abstractions sounds important, customers largely feel that the 15 year timespan to see results is long and that there are more pressing problems that need attention now, such as reducing leaks and river spills.

"I feel that Thames Water need to do some of the basics first, such as ensuring that gutters are cleared so that we don't have water wasted, causing issues generally." **Female, 55-64, BAME, Non-Household Customer**

And some who are struggling with the current cost of living crisis, felt there are more pressing societal issues that make it difficult for them to prioritise environmental improvements to areas they do not live in or visit.

"There is no mention of a life or death situation here. The investment is not going towards a new drug, or social care housing benefits etc. I think in times of austerity, sustainability is hard to think about, and be prioritised." **Female, 25-34, BAME, Household Customer**

On the other hand, other participants (mainly Non-Household Customers) view the approach from a more strategic angle and so support the importance of planning ahead. Furthermore, they understand if no action is taken now, then it will be more costly in the future and so there is a higher sense of urgency. It is clear to these participants

that Thames Water has a plan, and through the information given there is more acceptance that it may take a while to be fully implemented.

"The solution is simple. For the sake of the future, abstraction must be reduced as soon as possible, this will markedly lessen the impact medium to long term" **Male, 45-54, BAME, Non-Household Customer**

Overall, participants found this information to be insightful but they still have questions.

Firstly, despite there being a level of acceptance around the 15-year plan, participants want more background and context. For example, what actions had been taken prior to this plan and why wasn't action taken sooner? These answers may reassure them that this solution has been well thought out and is better compared to other options as well as giving them context as to why abstractions have been used up to now despite the impact on the environment.

"Thames has been aware of the issues being addressed for years but has been very slow in reacting to them and has done so in a very limited way. I keep coming to the conclusion, too little, too late." **Male, 65+, White, Household Customer**

Certainly Thames Water knew about the issues probably 10 years ago and did they initiate anything at that stage. **Female, 35-44, White, Non-Household Customer**

Secondly, participants wanted to know what guarantees they have that work will be carried out as specified when they perceive there to be fundamental issues with the water network (e.g. leaks and sewer spills).

"The only feeling I have is because it's voluntary are Thames Water able to change their decision in the future if it doesn't seem like they are hitting the requirements? But saying that I do feel more needs to be done to halt the impact of foul water and protect the environment." **Female, 45-54, White, Household Customer**

"As far as I am aware, Thames Water is one of, if not the biggest offender to pollution leaks/polluting waterways (cheek to blame storm overflows!) - it's always profit over everything - and they want to increase bills to pay for this. Typical." **Female, 45-54, White, Household Customer**

Thirdly, more transparency is needed over how the reduction of abstractions may disrupt them as a customer, and what they can expect over the next 15 years.

"It is a good idea to reduce the abstractions to help preserve the environment but I do worry about the additional costs to businesses and the disruption it could cause." **Male, 45-54, White, Non-Household Customer**

What is the balance between protecting the environment vs paying higher bills?

Protecting and benefitting the environment, wildlife and the local community is widely supported, and the collaboration with the Environment Agency in relation to ensuring sustainable abstraction provided a level of reassurance. However, there were questions

around why action hadn't been taken sooner as well as confidence in the delivery of solutions. There is also a need for transparency around how reductions in abstractions may impact them as customers, both in terms of disruption and bill increases.

A common theme amongst participants is to ensure everyone is accountable for the damage made to the environment, and that the burden isn't solely left to the customer to pick up.

"I agree with the approach in general but feel that it's unfair for us the consumers to pickup all the additional costs." **Male, 35-44, BAME, Non-Household Customer**

Those willing to contribute more see higher bills as a 'necessary evil' and that this may be the only way the environment can be protected effectively. Therefore, the mention of the "highest level of environmental improvement" resonated well.

"I definitely agree because it is essential that we protect our environment; without environment it doesn't matter how much money we will be able to spend" **Male, 35-44, White, Household Customer**

For many, the cost-of-living crisis is front of mind and the mention of higher bills was received more negatively. Among the increase of household bills, more vulnerable participants are already struggling to afford the more basic essentials. This makes it harder for them to relate to preventative approaches and the future proofing of environmental factors.

"The plans to reduce abstractions seems like a double-edged sword. As much as it is a requirement for our environment to thrive and preserve nature, how much will it impact homes and businesses financially?" **Female, 25-34, BAME, Household Customer**

From a Non-Household customer perspective, a similar pushback against higher bills was felt. In addition to the rise in cost-of-living, small businesses particularly struggled through the pandemic and lockdown periods. Only recently have these businesses been able to become more financially stable and secure, so now isn't good timing to learn of higher bills. However, Non-Household customers can relate to the principles of shared social responsibility and finding sustainable solutions for the environment and therefore a contribution to this approach was supported to an extent.

"In my opinion it depends what is the impact on the bill, is it reasonable and realistic and one can pay without struggling, or would it cause small businesses to come out of business." **Female, 45-54, BAME, Non-Household Customer**

In addition to participants feeling that they are taking on the brunt of costs, current bill payers felt that cost increases should be incremental. This is not only to ensure future bill payers are also accountable, but so bills are more manageable for current bill payers in a time of financial struggle.

"I think it is important action is taken now due to it taking 15 years for plans to come to fruition but the costs should be staggered so future generations and bill payers also pay for the benefits." **Male, 25-34, BAME, Household Customer**

Another consideration is transparency; participants want to know how bill increases are calculated, how or if they are distributed differently amongst different areas, and how it will initially impact their bill. As affordability becomes more of a priority, participants are keen to get more context and assurance that any increase to their bill is fair and considered.

"Although I do wholeheartedly agree with protecting the environment and lowering the impacts we have on the earth, bills must also stay affordable especially in the financial situation we are in now." **Male, 18-24, BAME, Future Bill Payer**



Fig 3: The Ignite AI tool identifies and codes sentiments scoring them from 0 – 5 (0 being most negative and 5 being most positive). In response to Thames Water's plans to reduce abstractions at a faster rate, around 2/3s exhibited a positive response to the plan (sentiments scoring 4 – 5) but around a third of the sample scored 3 or below.

9. Making the most of available water

Before being introduced to the consultation information, participants were asked to guess how much water they thought was lost through leaks, how much of those leaks were in businesses or homes and what impact they thought a smart meter would have on saving water.

The Non-Household customers estimated 53.3% of water is lost through leaks, which was the highest of all segments, household customers estimated it was 44.5% and for future bill payers it was 40.0%. Non-Household customers also guessed the highest amount of water saved by having a Smart Meter compared to household customers and future bill payers. Customers were more likely to express scepticism around the effectiveness of Smart Meters in general and were surprised that they were part of the plan to make best use of available water.

"I was not aware of just how high the impact of smart meters was, this greater usage of smart meters must have a big impact on water consumption and use. This seems to be very important to the overall plan and will serve as an important part of meeting demands." **Male, 18-24, White, Future Bill Payer**

"It is interesting to see the statistic that smart meters can reduce water usage by 13%. I am intrigued to know how or why? Is it just that people are more aware and therefore more careful with their water?" **Female, 25-34, White, Household Customer**

All the customer segments agreed that households have a responsibility to do their bit to reduce leaks within their homes as it is easier to do this than it is for Thames Water to carry out major repairs. However, they feel that it is difficult to encourage everyone to change their behaviour and reduce how much water they use so this is unlikely to be a successful approach if not combined with other water saving initiatives (i.e. fixing leaks) and new sources of water.

Many customers, particularly bill payers, feel that Thames Water could do more to reduce leaks more quickly to reduce the amount of water being lost in this way. When educated on what is involved in reducing leaks, participants are sympathetic to the challenge that Thames Water face but around a quarter feel that this is an issue caused by a previous lack of investment and that the targets (halving leakage by 2050) are not ambitious enough.

Using water wisely

Participants were informed about the amount of water an average person will use in a day and Thames Water's targets to reduce this. They were also informed on the targets set by the Government which are much more ambitious than those set by Thames Water.

There was consensus across the groups that Thames Water's conservative target was more realistic compared to the Government's plan. There is disappointment from those who are already doing their bit to conserve water that tougher targets won't be implemented however the reasoning behind this is understood and that it is more realistic to encourage small changes than to force a larger one. It is hoped that once the Thames Water target is achieved that more will be done to reduce customer usage to be more in line with the Government target.

"I think it's natural for TW to have a lower target than the gov as they are always going to be more conservative and not want to set targets they don't think they can meet as it's bad for morale. I think having a target to measure progress is vital as you need to see that the actions you are implementing are working to increase staff and customer confidence in their value." **Male, 35-44, White, Non-Household customer**

I think Thames Water's target/way to go is absolutely right. I think for a lot of people/users, it's tough enough getting them to use less water, preserve water, be much more sensible about water usage, and being TOO Draconian about it in the short-term will simply alienate people and they may turn to not doing ANYTHING to use less water instead of at least doing SOME things. **Female, 45-54, White, Non-Household customer**

I think the Government trying to reduce household water usage to 110 litres per day is a bit far-fetched if a bath uses 80 litres how can some get by with only 30 litres left it will be a big ask however in my household ..I think Thames's approach to cutting water is more realistic than the Government's I can see households complying to this plan **Male, 35-44, White, Household customer**

There was also a feeling that Thames Water should not penalise customers too harshly without first doing more to prevent water loss through leakages.

Any reduction in use is the right thing to do as water will become less available, but decrease in use must be accompanied by a reduction in loss due to leaks. **Female, 25-34, White, Household customer**

My thoughts about this information are that I was very surprised to learn that a quarter of supply is lost through water leaks. That's HUGE! I think that it's all very well, and of course necessary, for people/consumers to be asked and encouraged to save water/use less water, but if we're still losing a quarter of supply through leaks, then surely this has to be addressed more quickly? **Female, 45-54, BAME, Household customer**

They also shared the sentiment that Thames Water are the experts in the field of making these types of calculations and estimations and felt going the 'conservative' route was

more likely to succeed. The overall sentiment was these targets are extremely important to ensure there would be no situation where the region runs out of water, and Thames Water is doing a good job in flagging these problems now rather than further down the line when the situation would be unsalvageable.

"[I] learned about the targets to reduce water use, by the Government and by Thames Water, this is new to me and hadn't heard/read about it before. I trust Thames Water more than I do the Government, plus [I] would think they know better so would think their target is more realistic and achievable. [It's] definitely important to the overall plan to encourage people to use less water, otherwise there'll not be enough to go around in future." **Female, 45-54, BAME, Household Customer**

"To be honest I have no trust in this current Government and I would think TW are water experts so if they say the target is unrealistic I would tend to believe that." **Female, 45-54, White, Household Customer**

Do people think it's likely that they will reduce their water usage?

Participants were shocked to learn the average water usage of a person in the UK per day. The information presented to participants put the current water usage into perspective and many participants indicated this information should be readily available. Participants also indicated there needs to be education on the amount of water everyday items (such as white goods) use, to ensure the total water consumption of residents in the UK decreases. This information should be given to all Thames Water customers as they can assist in educating others about water wastage from everyday household items.

There were no differences in the sentiments shared on reducing water usage from Non-Household, current household, or future bill payers.

"Shocked! I guessed people use 30 litres per day and that isn't even enough to do one load of washing!" **Female, 25-34, BAME, Household Customer**

"I am gobsmacked by the amount of water used by the average person per day, as well as the difference between older showers, toilets and washing machines. The contrast and volume of totals are extraordinary." **Male, 45-54, BAME, Household Customer**

However, there was little evidence to suggest that participants were going to change their existing behaviours. Many felt that they already do their bit and that it's for others (customers, house builders, businesses) to reduce their consumption. Most participants did not feel that they were excessive users even when presented with the breakdown of how much water an average person uses in a day.

"I use a dishwasher at home in eco setting and find that I do less 'washing up' so overall feel this is a water saving - no running tap or frequency of bowl change etc. this is a recent change. I've never

really considered toilet flushing in my water usage! How could we save water here?" **Female, 25-34, White, Household Customer**

"I think it is important taking steps to reduce water usage and this is something I do such as not leaving the tap running when brushing my teeth and taking short showers, I think it is little things like that can help save water usage." **Male, 35-44, White, Household Customer**

"I would very much like to see housebuilders playing a greater role in water conservation. If Building Regulations were to dictate greater water efficiency in new homes (such as the use of grey water to flush toilets, water the garden etc) then savings could be even greater." **Female, 45-54, White, Household Customer**

Smart Meters

Participants were not aware of the exact percentage smart meters help reduce water consumption by, with most participants feeling 13% was not much of a reduction. Participants also shared the sentiment every adjustment would assist in reducing the total water consumption of residents in the UK. Even though participants felt smart meters only make a small difference, they still stated it is essential to roll-out smart meters to all residents, seeing the importance of the smart meters.

"13% is not such a large number but better than nothing and all savings are helpful. Most customers will just read this as a 13% reduction in bills and want a Smart Meter. It feels like a minor importance in the overall plan but having lots of 13% savings over different measures will add up to large overall savings." **Male, 35-44, White, Non-Household Customer**

"I saved 66% on my water bill with the smart meter... I have avoided the electricity smart meter which I'm not sure I trust yet... but the water meter was a major saving. I expect that having to pay per litre of water used will focus minds and prevent a great deal of water wastage, but if everyone's bill drops a bit like mine did it might cause a significant drop in Thames Water revenue. I can't find any information about that." **Male, 55-64, White, Household Customer**

Leakage

Participants were asked their thoughts on targets, if they are ambitious, and how much they think these goals will contribute to the plan overall. Most participants were shocked by the amount of water that gets lost through leaks, as well as the vast waterpipe system Thames Water must maintain. Some of the participants, felt Thames Water should have done something about the leaks much earlier.

The largest portion of participants (60%) were supportive of the targets set by Thames Water to halve leakage by 2050. These participants stated the target is reasonable, given the length of time and disruption to fix water pipe infrastructure in a heavily populated area like London. Around a quarter of participants felt reducing the leaks by 16% by 2030

and halving the leaks by 2050 does not go far enough and that Thames Water should aim for more ambitious targets.

"I was surprised to learn that 25% of water is lost through leaks - a man-made problem which puts strain on the environment. ... I'm surprised to learn that the target is to only halve the leakage by 2050, and not to practically eradicate it. I would like to see the leakage halved no later than 2035." **Female, 25-34, White, Household Customer**

"[It's] sobering to read just how much water is lost through leaks. I had [no] idea it was as much as a quarter and that there is still so much more work to do to replace ageing pipes... The targets are impressive... The problem clearly remains in London where the issue is more complex and will take much longer to fix." **Male, 55-64, White, Household Customer**

Thoughts about the overall plan to make the most of existing water sources.

The information was well received and put current concerns into perspective which helped to better understand the issues at hand, as well as the work that Thames Water is putting in to resolve them.

The information given on current water usage, smart meters, and leakages shocked many of the participants which indicates the lack of awareness and understanding the general public have around water usage, water wastage, and the work Thames Water is doing to mitigate these.

10. Proposed investment – new sources of water

Following water savings solutions, participants were then given information on the plans to introduce new sources of water.

The plans are:

- A new abstraction in west London supported by water recycling
- South East Strategic Reservoir
- Severn to Thames Transfer

Participants were asked about their current knowledge of the plans prior to being shown any information. This was to capture spontaneous and uninformed views before being shown the consultation materials.

Awareness across all participants of the proposed investment was low, however there was some awareness (particularly from participants aged 45+) of desalination as a potential solution. Those who mentioned this as a solution believed this would be a sustainable option due to the abundance of sea water. There is little known of the mechanics of what desalination involves, the cost to implement it, or the impact it has on the environment.

"I wasn't really aware of the plans for new sources of water; although I had thought to myself before: "There is vast amounts of water in the oceans and I know it's salt water but surely in the 21st century, there must be a way to use this water and take out the salt for us to be able to use it?" **Female, 45-54, White, Household Customer**

The new abstraction site at Teddington was the most known option without prompting. Participants who were aware of this were likely to live in the Southwest London area (verified by post codes). They had seen negative coverage of the scheme in the media but stated they had not investigated it and therefore were not able to clearly state if they were for or against the plans. They had heard anecdotally the plan was to put treated sewage back into the Thames, which would damage the quality of the water at this part of the river.

Reservoirs were mentioned spontaneously as a solution and there were some awareness new reservoirs had not been built for a significant amount of time. There was little awareness there was a site for a new Reservoir and the local objections to this.

Awareness of the investment required for any new scheme was low across all groups, although most were positive towards investment, in principle, to ensure a sustainable water supply in the future.

Looking for new water seems like an efficient plan for the future, I wasn't aware of the options available. With the direction everything is going, it seems smart to plan for other resources from now. It would just be interesting to see how the local communities within the said areas react to the work potentially being done and hopefully they can see the long term investment. **Female, 25-34, BAME, Household Customer**

After learning about the water deficit faced in the Thames Water catchment and that water saving measures would not go far enough, investing in new water sources was thought to be prudent and none argued against the need for development.

No single measure will be able to solve the problem of dwindling water supply in isolation, these measures have to be looked at as a package meaning that all of them will have to be implemented (plus more!) in order to maintain confidence that we won't run out of water in the future. **Female, 25-34, BAME, Non-Household Customer**

A new river abstraction at Teddington, West London

Participants were presented with the information on the proposed scheme for a new river abstraction from the River Thames at Teddington supported by water recycling. The information included a high-level description of the scheme and concerns raised by the local community. This was followed by more in-depth information about the abstraction process and illustrations to show what the site would look like after completion.

Responses to the scheme were mostly positive, even from people who lived near the area. Those who are familiar with the location or live closer to the Teddington area were sympathetic to the objections, but overwhelmingly felt the benefit to water supplies outweighed any local concerns around environmental harm to this part of the river.

"This seems to me like a sensible, and environmentally friendly way, to ensure consistent future water supply." **Female, 45-54, White, Household Customer**

The mention of being a low-cost solution that is relatively quick to implement were seen as positives and reasons to support this plan. Future Bill Payers and younger participants (under 25) were more likely to have concerns around the environmental impact but say that they feel reassured by the explanation and that the water released into the Thames will be of a high quality.

"It is, in essence, giving back to the river what has previously been taken away from it. I personally mainly see the positives of this solution, focusing predominantly on maintaining water levels and making sure we don't damage the natural environment any further. I see benefits not just for the wildlife, but also to local communities through job creation, stable water levels reducing the need for hosepipe bans and allowing people to use the river for recreational activities, low carbon discharge to the atmosphere and so on." **Female, 18-24, White, Future Bill Payer**

Being a low carbon option was also considered to be a positive across all groups but in particular by Future Bill Payers and younger customers. The information about creating biodiversity within this part of river was also positively received among the younger groups.

Some had concerns that the process could fail, and untreated sewage could be introduced into the river causing environmental harm. They would like more information on the overall risks that something could go wrong with this method and, if so, what the consequences would be on the environment. There are also minor concerns about the chemicals that will be used to clean the water. Some reassurances that the water reintroduced to the Thames will not upset the eco-system and that wildlife will not be impacted as a result, may combat this. There is some empathy for those who live in the area who will have some disruption with a new development along the Thames. However, the majority feel the need for a consistent water supply in the future outweighs any of the concerns raised by local people. **To mitigate any local opposition, participants suggest further investigation into any possible harm** that could be caused by the water recycling process and ensuring that any development is in keeping with this part of the Thames.

"Given the changing temperatures and climate change issues this is a very valuable option to consider and take on board. I like the fact that it is low carbon and works towards achieving a carbon neutral offering. However, the cons are significant and need to be fully appraised and considered before we can say that this is a positive idea. Central to all of this is that water quality in the Thames needs to remain high. Also we can not impact and damage the ecology in the area." **Female, 35-44, BAME, Household Customer**

"Teddington wouldn't be my preferred method but if that is going to provide the quickest benefit in a timescale that is required due to scarcity, then I cannot argue with that." **Female, 25-34, White, Household Customer**

"I do find it laughable that one of the concerns from the local community. being worried about their water sports? How is that a proper concern when considering the bigger objective?" **Male, 65+ White, Household Customer**

"I think the Teddington abstraction in 2030 therefore in 7 years time will tell us a lot about how the remaining two steps towards the 2050 target will develop. I think on paper it looks good so lets wait and see." **Male, 25-34, White, Household Customer**

"The quicker and cheaper option of Teddington will help ensure a consistent supply quicker than the other schemes. These can then be developed to help meet future needs as population and environmental issues increase." **Female, 45-54, White, Household Customer**

When looking at the sentiment by age (5 being the most positive and 0 being the most negative), overall, all groups are shown to be positive towards the Teddington abstraction proposal.

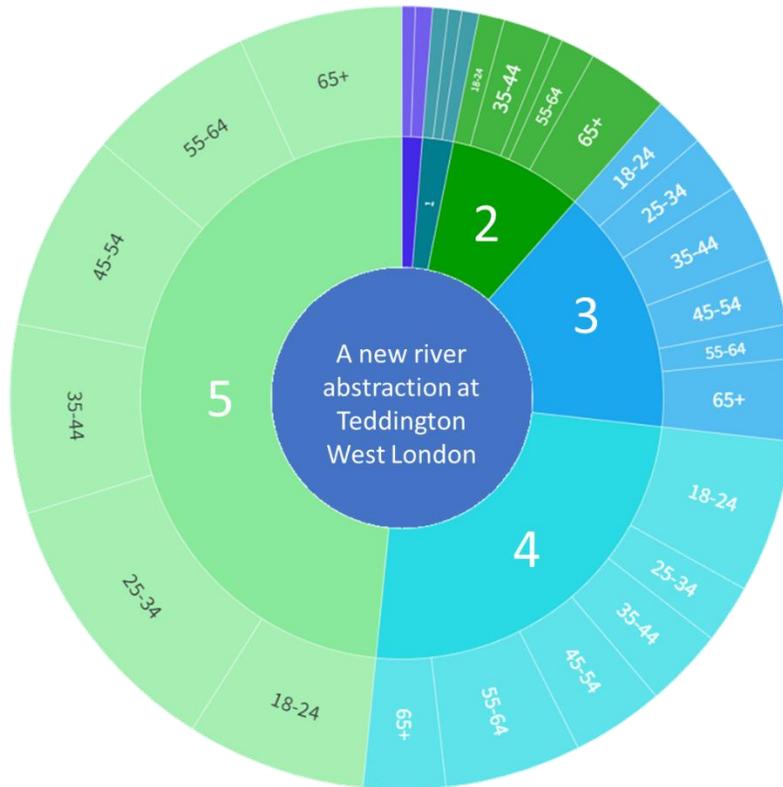


Fig 4: The Ignite AI tool identifies and codes sentiments scoring them from 0 – 5 (0 being most negative and 5 being most positive). In response to Thames Water’s plans for a new abstraction at Teddington, around ¾ of participant responses scored 4 or 5 suggesting a mostly positive reaction to the plan.

South East Strategic Reservoir

The reservoir is considered the best solution and that it would be an asset to the local area. The concerns raised by the local community were not considered strong enough to prevent the build and many feel that having a space for recreation would be an additional benefit to the local area.

Participants were introduced to the plans for the reservoir to be built in the Upper Thames catchment, south west of Abingdon in Oxfordshire. The information included details of the location, the size, and what would be involved in the development of the plans. The benefits of the proposal and the concerns by the local community were included in this information.

Participants also saw a visual representation of the plans and were given information about the size using recognisable frames of reference.

Reservoirs are easy to understand and are considered a natural solution that could benefit the environment, as well as provide a reliable water supply in the future. Therefore, this is the most accepted of the three initiatives. There is some disappointment the plans will be for the smaller size (to appease local objections) as building a larger reservoir was thought to better protect the Thames Water area from running out of water in the future. With no obvious downside bar the immediate disruption of the build, it was felt that having a larger reservoir for a similar cost seemed like the best approach to ensure a secure water supply for the future without the need for further investment.

There was positivity across age groups and geographical location. Non-Household customers in particular feel not going for a larger size, when costs are similar, is a missed opportunity.

"I have a particular interest with the South East Reservoir (Abingdon) Plan as I live locally and have a vested interest in it's development. It doesn't mean I'm not concerned about what impact such a huge project will have on the locality. There will be massive upheaval for the community and our eco systems. I believe subject to strict controls, this is a price worth paying to ensure we protect our future water supplies. The environment is good at self repair and provided it is done in consultation with all the local bodies that protect our eco systems, wildlife and fish etc we should push ahead with the plans." **Male, 55-64, White, Non-Household Customer**

"The size currently adopted seems sufficient but a bigger size that would have provided 50% more water should have been the option, notwithstanding local objections, especially, as it would have essentially within the same investment bracket. Forecasts will change and inevitably, they may have to revisit to either build an additional reservoir or expand." **Male, 35-44, BAME, Non-Household Customer**

There are minor concerns and queries about the impact building the reservoir will have on the local community and the environment. However, even here there are thought to be benefits for local businesses to win contracts to help with the development and opportunities for new businesses to operate (such as leisure businesses) once the work has been completed.

“One potential concern is the environmental impact of the reservoir on the local ecosystem. The creation of a new body of water can affect local wildlife and vegetation, alter water quality, and potentially contribute to climate change through the release of greenhouse gases from decomposing vegetation. Additionally, the construction of a reservoir can be expensive and may require significant investment in infrastructure, such as pipelines and treatment plants, to transport and treat the water before it can be used.” **Male, 25-34, White, Household Customer**

Those who were previously aware of the objections to the new reservoir mention “flooding” as a concern and say those who live near the area would need to be given guarantees they would not be adversely affected by the development.

“Reliable new source of water would alleviate the pressure on the resources. I’d be concerned about flooding if I was local.” **Female, 25-34, White, Household Customer**

As for the “abstraction at Teddington” proposal, participants feel the benefits of securing a reliable water supply outweigh the concerns of those who live near the proposed reservoir site.



Fig 5: The Ignite AI tool identifies and codes sentiments scoring them from 0 – 5 (0 being most negative and 5 being most positive). In response to Thames Water’s plans for a South East Strategic Reservoir, the sentiment analysis scored the majority of responses as 4 or 5.

Severn to Thames Transfer

Participants were shown information for the Severn to Thames Transfer including benefits and concerns raised by the local community. They were also shown an illustration of the scheme.

Of the three schemes, this had the least support. The scheme was considered to sound ambitious and difficult to complete and there were concerns that Thames Water would not be able to deliver this. The reliability of the scheme was also questioned; it relies on other water catchments having a surplus of water to send to the Thames Water area. Therefore, would taking water from other catchments cause potential shortages elsewhere?

"On one hand it would be beneficial for the south east and Thames Water area as they would have another source of water for the drought periods, however the complexity of the scheme means there are many way in which it would go wrong. For example the infrastructure may fail and it would also be very costly for the company. However it is a good way to plan for the future in regards the higher forecast of the drought." **Female, 18-24, BAME, Future Bill Payer**

There are concerns about the disruption and impact on the areas the pipeline will travel through. Any impact on the Cotswolds was considered to be unacceptable by those in higher social grades or those who are older. The argument against being that those who are being impacted would not benefit from the scheme which feels unfair.

There were also significant environmental concerns from all groups that transferring water would impact negatively on wildlife. The main concern was taking water from one area and putting it in another that may have different qualities and therefore impact wildlife that lives there.

"It's a big work and project. I think this would have a big impact on nature and wildlife as I guess water quality isn't the same in the areas and if there's a balance it shouldn't be touched." **Female, 25-34, White, Household Customer**

To gain support, there would need to be a greater explanation of the scheme and assurances it is feasible and will work, rather than something that could end up costing money but not delivering. This would include understanding future forecasts for water in other regions, the cost of delivering the work and how it will be funded, any risk to the plans not being delivered (such as lack of experienced engineers or any experimental techniques needed to make this a success). Finally, there would need to be assurances that communities that may be impacted by the build will be protected as much as possible from any adverse impact of the build.

“Whilst it would seem positive in that it makes sense to share resources nationwide, and I personally like the idea of restoring canals, on the whole it seems that there are more downsides and potential threats to the environment with this strategy, and that it would be a bigger investment financially, and so this wouldn’t be one of my preferences for future water supply on initial reading”. **Female, 25-34, White, Household Customer**

Those who support the Severn to Thames Transfer felt that securing a reliable water resource in the future is the most important aspect. However, of the three schemes, this one received the most negative feedback with the emotional data showing a higher index on negative emotions.

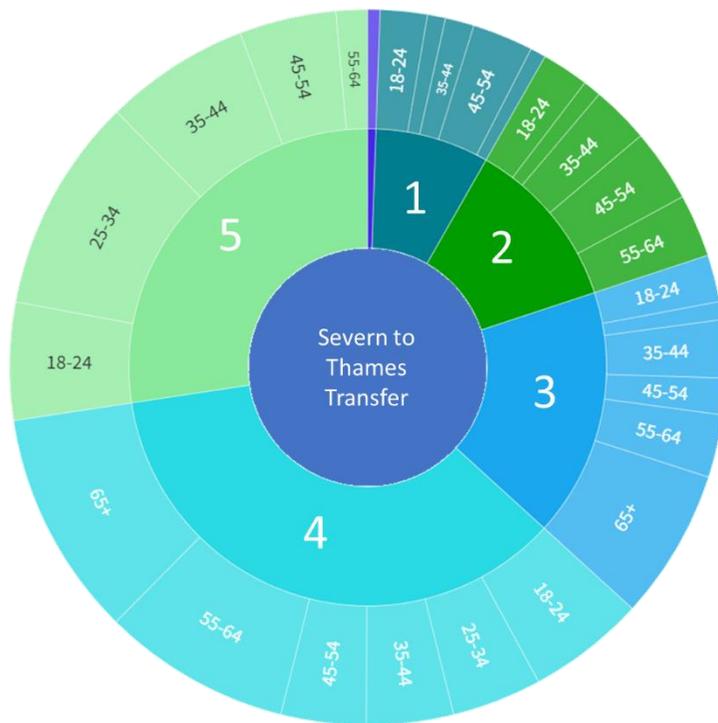


Fig 6: The Ignite AI tool identifies and codes sentiments scoring them from 0 – 5 (0 being most negative and 5 being most positive). In response to Thames Water’s plans for a Severn to Thames Transfer, the sentiment analysis was more spread than the other two plans, with many more responses scoring 1- 3. Although the majority score higher, there is evidence that these scheme is the hardest to explain and has the least support.

Summary of plan and thoughts on timings

There is strong support for the plan overall as the majority agree that it is important to act while there is time to make a difference. However, there are concerns about the cost of this to bill payers, especially if the plans sound too ambitious to guarantee a return (as in the case of the Severn to Thames transfer).

With that in mind, participants question if all three schemes are needed, or if the new abstraction at Teddington and the Reservoir would be adequate.

There is significant trust across the different groups that Thames Water have considered the options and are working in the best interest of their customers. There are concerns about the time it will take to implement the plans and that no immediate action is being taken. This creates worries that money will be spent on interventions but they will come too late to make any meaningful difference. There are also some thoughts that opposition from local groups and the need for permissions will delay things further, and that no plans will ultimately be realised to create new sources of water.

*It's disappointing to learn that the new schemes will take so long to get delivered and worry that with such a long planning horizon, Government support or management resource would change over time, delaying delivery even further. **Male, 45-54, White, Household Customer***

*I certainly think it is essential and really am surprised it has taken this long to get the ball rolling, this is something that has been in the works for decades now surely? **Male, 35-44, White, Household Customer***

There is a general view that Thames Water will have to negotiate with a number of different parties to get permission to start any work.

With information shared on the reasons for likely water shortages in the future (population growth, climate change, and increase of droughts) participants had a stronger sense of urgency that water shortages are a real threat to the future. Therefore, their priority is for Thames Water to act sooner to ensure projects are delivered when they are needed.

11. Bill impact

Across the research, there is a consistent feeling those with higher stakes in the WRMP (e.g., Government funding, taxes, the water companies involved, etc.) should pay a higher cost, taking the burden off consumers. The cost-of-living crisis is also mentioned with consistency and there are concerns those already struggling will not be able to cope with the extra cost of the WRMP to their bill. Few suggested to split the costs more equitably based on household income.

Within the group discussion on the topic of bill impact, concerns over the quality of water, the environment, and disruption to the local community were raised; there continues to be mention of the cost being placed elsewhere and not on the customer, but that everyone needs to “do their part”, and an acknowledgement about the extent of the problem.

People largely want to protect the environment, they do not necessarily wish to pay for it.

*“[on the reduction of water abstractions] A £30 spend is enormous, this is from tax payer’s/bill payer’s money. To then not be privy to the outcome aside for the mere mention of improving conditions for fish makes me a little angry even.” **Female, 25–34, BAME, Household Customer***

The most common phrase recorded by Ignite AI around the bill impact question is “bill increase”, which is reflected in the social grade groups of AB and C1. For Social grade group C2, the most common phrase is “expensive plan”, and for DE it is “agree plan”.

*“...I do not feel the consumer should have to pick up this bill. There should be Government funding to cover some of these costs.” **Male, 35–44, BAME, Non-Household Customer***

*“The proposed increases initially seem somewhat reasonable to me. ...it[’s] misleading as inflation has been excluded... ...isn’t fair for the costs to be passed down directly to households... Instead, a significant chunk of these investments should be funded through taxes...” **Male, 35–44, BAME, Household Customer***

*“I think the costs are worth it to everyone involved. ...having water is the most important thing...” **Female, 35–44, BAME, Non-Household Customer***

*“There will never be a right time.” **Female, 55–64, White, Household Customer***

12. Summary of feelings about the Water Resources Management Plan

How acceptable is the WRMP to the wider Thames Water customer base?

Participants across all the sub-groups agree a plan is needed to ensure a reliable water supply in the future. There is some frustration plans have not already been put into place as it is felt work should already be underway. The time it takes to build the new schemes is a concern and participants worry further delays will mean solutions will not be ready in time for when water resources are under pressure.

In places, the plan is not thought to go far enough, particularly with the targets around leakages and generally being seen to have taken too long to start putting plans in place but overall the participants believe that the WRMP offers an acceptable solution.

Do customers feel the plan is fair and proportionate or do they feel the forecast is inflated ?

Having experienced record breaking temperatures in 2022 and experienced some water saving measures (i.e. hose pipe ban), the predictions for the future pressure on the water supply are believable and the plan offers a proportionate response. None thought that the forecast sounded inflated and there was a general consensus that water resources was not something that should be put at risk even if the predictions do end up being over inflated.

What are customers attitudes to the threat of water shortages in the future versus the need for development and investment now ?

Customers are concerned that Thames Water are not acting quickly enough to develop new water sources now. There is particular criticism around the lack of new reservoirs which are perceived to be the best solution to securing a reliable water source. There is concern that further delays will occur and that any development plans will not be implemented in time. Customers are therefore in favour of work starting as soon as possible.

How do attitudes differ between people with an environmental outlook vs. those who prioritise lower bills or limited disruption to their local areas ?

In this cost-of-living crisis, most customers want lower bills regardless of their opinions on the environment. The rise in bills is a source of anger as the burden of development

appears to be placed upon the customer despite reports of bonuses being paid to staff and shareholders. There is a view, particularly with older customers, that Thames Water and the government should share the burden of development especially if the work is for the benefit of the environment and not to improve the service (this is particularly true of the reductions in abstractions).

Disruption is not considered a big barrier to improvements although there is some acknowledgment that making repairs to the system in London must be a challenge and that this is likely to be a factor in locating and repairing leaks.

Those who are more environmentally minded (particularly future bill payers and younger customers) do favour solutions that are seen to be less impactful on the environment such as a new reservoir that is thought to be a way of creating new habitats for wildlife and encouraging people to make the most of existing water supplies. Although they would like to ensure the environment is protected, they would rather that the cost of this was not placed on the customer. Participants would like further reassurance that all environment issues have been considered and planned for. This is particularly in relation to the Severn to Thames transfer which is thought to be the riskiest part of the plan.

What impact does the perception of Thames Water, and specifically current performance such as leak management have on views for the WRMP?

There is some frustration at Thames Water for not going further in reducing waste by fixing leaks more quickly and doing more to educate customers on their obligations to save water.

Customers overall trust Thames Water and feel positive that a plan is in place to tackle this important issue. However, there is disappointment that more has not been done already, particularly with leak management. There are also some concerns that Thames Water would not be able to implement some of the more challenging parts of the plan in time, specifically the Severn to Thames transfer. There are concerns that more ambitious plans such as this would not be possible when Thames Water is unable to commit to solving leakages sooner than the proposed 2050. This lack of trust does not extend to the plans for abstractions of Teddington and the new reservoir which have shorter timeframes and appear to be easier to build.

Finally, there is disappointment the cost of the investment is to be placed on the customer rather than shared by other parties. The need for investment is clear and there is support to ensure there is enough water for everyone in the future, however in the current financial climate, the thought of bill increases is not welcomed news.

"The plan must be affordable- yes - but with the increases to the water bill, that won't make people happy. As of now with the Cost of Living crisis, people are struggling enough as it is to pay their bills,

not only for water. The main emphasis and importance of water management in the future can easily become forgotten about amongst the ever increasing hardship of living day to day." **Female, 45-54, White, Household Customer**

"I understand that this is work that we have to do, but to me it seems that the increases are quite big, and although you look at it and break it down it will be a drain to people. Especially as we are living in a cost of living crisis and I feel that as a company you should absorb all the costs rather than only giving us a part of it. We pay our bills as a whole not breaking it down. As a company you should be using parts of the profits not just raking it in from companies, there will be a lot of resistance re the charges"
Female, 55-64, BAME, Household Customer

I believe that these increases on the bill are largely acceptable, they are small amounts to solve big problems that will likely come up as bigger issues in the future, however these increases must deliver what they promise, better infrastructure must be built, and pipes must be maintained more than they currently are. **Male, 18-24, White, Future Bill Payer**

13. Appendix

13.1 DISCUSSION GUIDE AND STIMULUS

Discussion guide

Task details	Text
<p>Title: Welcome to the community</p> <p>Day(s) & order: e.g. 1.1</p> <p>Allocation: See red text</p> <p>Task type: Private blog</p> <p>Stimulus: N/A</p>	<p>ALL</p> <p>Welcome to our community where we'll be discussing the future water supplies for the Thames Water area and the possible ways that Thames Water will be making investments to ensure that this stays consistent and reliable.</p> <p>BUSINESS CUSTOMERS ONLY</p> <p>To start with, we would like to know a bit more about you.</p> <p>Tell us a bit about your role and your business.</p> <p>How long Thames Water has been your water supplier and what your experience has been like?</p> <p>How much water you think your business uses at its office/s and if this has changed at all over the last year or so?</p> <p>THAMES WATER HOUSEHOLD CUSTOMERS ONLY</p> <p>To start with, we would like to know a bit more about you.</p> <p>Tell us a bit about yourself and your household.</p> <p>How long Thames Water has been your water supplier and what your experience has been like?</p> <p>FUTURE PAYING CUSTOMERS ONLY</p> <p>To start with, we would like to know a bit more about you.</p> <p>Tell us a bit about yourself and your household.</p> <p>How long have you been with your current water supplier, who are they, and what your experience has been like?</p> <p>FUTURE PAYING AND THAMES WATER HOUSEHOLD CUSTOMERS ONLY</p>

	<p>How much water you think you use at home and if this has changed at all over the last year or so?</p> <p>Probes</p> <ul style="list-style-type: none"> • Welcome respondents to the community
<p>Title: Water water everywhere?</p> <p>Day(s) & order: e.g. 1.2</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: N/A</p>	<p>This community is about Thames Water making plans to ensure that customers have a reliable water supply in the future.</p> <p>Over the next few days, we'll be sharing with you information about this but before we do, we wanted to give you a chance to have your say.</p> <p>In your opinion, how necessary do you think it is to invest in ways to protect our future water supply in the Thames area?</p> <ul style="list-style-type: none"> • What do you think are the biggest threats to water supply in the Thames area? • What opportunities do you think there are to protect our water supply in the Thames Water area? <p>Maybe you've heard about some of the plans already? What have you heard and what are your thoughts?</p> <p>There are no right or wrong answers to the above and only the moderator will see you responses so please be honest in your replies even if you're not sure if it is a popular view.</p> <p>We really value honest feedback.</p> <p>Probes</p> <ul style="list-style-type: none"> • Uncover what people think and feel already to get a base line for how they respond to the consultation questions • Where did they get their information from? • Do they accept that there is a threat to the future water in the Thames Water area?

Title: Water is essential for everyone

Day(s) & order: e.g. 1.3

Allocation: All

Task type: Private discussion

Stimulus: Q 1.3

Please read the information (or watch the video) and answer the questions below

- Tell us in your own words what you understand by this information
- Was there anything here that's new or surprising? If so tell us what and why it was surprising
- How do you feel about water supplies in the Thames Water area after reading this?

Probe: Has their opinions changed after reading/listening to this information?

Water is essential for ...
Our Society

- We all need water for everything from drinking, cooking, cleaning and washing to flushing the toilet, watering green spaces and doing the laundry
- Across London and the Thames Valley, we get through around 2.6 billion litres every single day
- Thames Water forecast that they'll need an extra 1 billion litres of water everyday for customers by 2075

What does 1 billion litres of water look like?

-  400 Olympic swimming pools
-  12.5 million baths
-  13 million 5 min power shower
-  5 hundred million cups of tea
-  2 billion ice lollies
-  588 million pints of beer

Water is essential for ...
Our economy

- With nearly as many businesses as the rest of the UK put together, the South East makes up over a third of the national economy
- As a water company in the South East, Thames Water contributes £billions by supplying water to industries as well as by investing in infrastructure and jobs
- Not having enough water to go around would cost London's economy alone around £500 million each day



Water is essential for ...
Our environment

- Our rivers sustain entire ecosystems and are home to over three million species of plants and animals
- Our nature reserves and reservoirs provide green spaces to relax, unwind and enjoy
- With a fifth of the UK's chalk streams in the area, it's Thames Water's responsibility to take care of them as part of their operations



Rain, rain don't go away

- Many people think we have plenty of water, but our region is actually one of the driest in the UK and is classified as "seriously water stressed" by the Environment Agency - *London gets less rainfall each year than Rome, Istanbul and Sydney.*
- In 2021-22, ten out of 12 months had below-average rainfall, and July 2022 was the driest on record. Not only that, we also had record-breaking temperatures in July of over 40°C. The long, dry period combined with unprecedented hot weather had a huge impact on our rivers and streams, with many of the smaller ones at extremely low levels or even running dry.
- Demand for water also soared, which is why Thames Water introduced a temporary hosepipe ban in August.
- The drought and the temporary hosepipe ban experienced this summer was a real-time reminder of the need to plan ahead.



Title: Planning our future water supply

Day(s) & order: 1.4

Allocation: All

Task type: Private discussion

Stimulus: Q 1.4

Please read the information (or watch the video) and answer the questions below

- Tell us in your own words what you understand by this information
- Was there anything here that's new or surprising? If so tell us what and why it was surprising.
- How do you feel about water supplies in the Thames Water area after reading this?

Probe: Has their opinions changed after reading/listening to this information?

Planning our future water supply

- Thames Water has a legal duty to provide a secure and sustainable water supply to homes and businesses across London and the Thames Valley
- The water resources we rely on are under pressure, and this is increasing all the time driven by our changing climate, our growing population and the need to reduce the amount of water we take from our rivers to protect the environment
- Thames Water have prepared a long-term plan, called the Water Resources Management Plan, which sets out the challenges and the actions they propose to take over the next 50 years to make sure we have a reliable water supply for future generations



Working together

Thames Water have worked in collaboration with the other water companies in the South East, as well as other stakeholders, to develop a long-term plan for the whole of the South East region. Working together has meant that Thames Water have been able to look beyond the individual boundaries and identify what will deliver the most benefit across the South East for the long term.



Title: The challenges we face

Day(s) & order: 1.5

Allocation: All

Task type: Private discussion

Stimulus: Q 1.5

This is the last activity for today

Please read the information (or watch the video) and answer the questions below

You have read or listened to information that outlines the challenge

- Tell us what you think of the risks of not taking action now? Is it important that we begin to make changes now or is it something we can leave for later?
 - What are the benefits to waiting to take action?
- What do you think are the risks of going ahead with new infrastructure now? Do you have any concerns about changes being made or have doubts about the challenges outlined above?
 - What are the benefits of taking action now?

Probe: There is always uncertainty in forecasts but there is a lead time for new infrastructure and if we don't plan ahead, we risk future water supply and having to bring in schemes which may not be the best for the long-term to provide a short-term fix.

We would like a customer / future customer voice on this extent of risk we should take in planning future water supply.

The Challenge we face

Why are our water resources under pressure?

A growing population

London and the Thames Valley is already one of the most densely populated parts of the country, with over 10 million people living and working here.

Thames Water have forecast that the number of people in our area could grow to over **12 million by 2050** and over **13 million by 2075**.

They will all need water.



The Challenge we face

Why are our water resources under pressure?

Our climate is changing

We're facing hotter, drier summers, which means there'll be less rain when we need it most, and extreme weather events will likely happen more often.

Thames Water have assessed how climate change could impact our water sources and how much more water we'll need to replace the supplies we may lose.

Forecast	Volume of water (million litres per day)
Low	45
Middle	120
High	183



This aquarium in Berlin holds One million litres of water

The Challenge we face

Why are our water resources under pressure?

An increasing drought risk

As our climate changes, we'll likely see more severe and frequent droughts. In severe droughts, water restrictions could see Thames Water rationing water for everyday activities or turning off supplies for certain periods during the day. Restrictions like this could last for several weeks, not only disrupting communities but also harming the local environment and damaging the economy.

Thames Water have calculated that this could cost London's economy alone up to £500 million every day.

Following recommendations from the National Infrastructure Commission, the government asked Thames Water and other water companies to make sure our water supplies are more reliable in severe drought by 2040.

Thames Water will need an extra 321 million litres of water in our area to reinforce water supplies to a one in 500 year type of drought where severe water use rationing is required.



The Challenge we face

Why are our water resources under pressure?



An environment under stress

Thames Water currently take water from the ground, streams and rivers and uses this for water supply. This is called abstraction. In some places Thames Water abstraction is damaging the environment.

We need to protect and improve our environment – reducing unsustainable abstraction to protect vulnerable chalk streams and other watercourses.

A healthy natural environment is crucial for a sustainable water supply, thriving plants and wildlife, and the health, wellbeing and enjoyment of us all.

We need to agree how much less water we should take from the environment, where and how quickly.

Title: Proposed investments -Protect the environment 1

Day(s) & order: 2.1

Today we will start to look at some of the ways that Thames Water can invest to secure a reliable water source for the future.

To start with we'll look at 'protect the environment'.

Allocation: See red text

Task type: Private discussion

Stimulus: Q 2.1

Read or listen to the information and answer the questions below.

[THAMES WATER CUSTOMERS AND FUTURE CUSTOMERS ONLY]

Reducing the number of abstractions will mean investing in new water sources and the faster the reduction the faster the benefits to the environment but this will also mean a higher the cost to households to fund the investment required.

[BUSINESS CUSTOMERS ONLY]

Reducing the number of abstractions will mean investing in new water sources and the faster the reduction the faster the benefits to the environment but this will also mean a higher the cost to households businesses to fund the investment required.

- What are your thoughts on abstractions and how do you feel about the plans to reduce the number of abstractions to benefit the environment?

Probe: How do they trade off potentially higher bills vs protecting the environment sooner

 **The Challenge we face**

Why are our water resources under pressure?



An environment under stress

Thames Water currently take water from the ground, streams and rivers and use this for water supply. This is called abstraction. In some places Thames Water abstraction is damaging the environment.

We need to protect and improve our environment – reducing unsustainable abstraction to protect vulnerable chalk streams and other watercourses.

A healthy natural environment is crucial for a sustainable water supply, thriving plants and wildlife, and the health, wellbeing and enjoyment of us all.

We need to agree how much less water we should take from the environment, where and how quickly.



There are practical limitations to how quickly Thames Water can upgrade its infrastructure and introduce new sources of water. Thames Water also need to make sure they can pay for these changes while keeping bills affordable. That's why Thames Water need to be careful about where they reduce abstractions and how quickly they do so.

In developing their draft plan, they've worked with the Environment Agency, Natural England and other environmental organisations to develop three scenarios that reduce the amount of water it takes from the environment - high, medium and low. This approach is in line with feedback previously received from stakeholders.

For now, they've based the draft plan on the 'high' scenario to provide the highest level of environmental improvement as quickly as possible.

This means they need to start developing new sources of water, which could take many years to be approved and built, sooner rather than later. This will be of benefit to the environment but is not the cheapest option and customers will see a rise in their bills (the amount will be shown on the last day of the community)

They'll monitor the impact of this work so they can see exactly how it benefits our wildlife and the rivers they live in and adapt the approach as they learn more.

2

Thames Water have chosen to aim for the highest level of environmental improvements.



These values indicate the volume of water that would not be taken from these locations, so a higher number is better

Hertfordshire & North London sites	
1 Lower Lea/River Lee	25 20 15
2 Upper Lea/River Lee	10 15 20
3 Harpenden Bottoms/River Mebourn	5 10 15
Total	50 65 80
Kent & South London sites	
4 River Great Ouse and Riverbourne	30 25 20
Total	30 25 20
Thames Valley sites	
5 River Kennet	10 15 20
6 Cotswolds	5 10 15
7 River Pang	10 15 20
8 River Wye	10 15 20
9 River Wyre	10 15 20
10 Chiltern Scarp	10 15 20
11 River Thames	10 15 20
Total	50 65 80

(2.2)

3

Case study: the River Kennet - how Thames Water could act to protect rivers and chalk streams from too much abstraction

- In 2010 Thames Water agreed to reduce its water abstraction to protect the River Kennet and one of its tributaries the River Og
- To enable this, a 10 mile pipeline was constructed from a reservoir in north Swindon, to another reservoir in south-east Swindon
- This made sure that there was an alternative water supply for customers in that area, transporting water between reservoirs instead of taking groundwater from the catchments of the Kennet and Og
- The cost was £30 million, and it took 4 years to develop and build
- The Rivers Kennet and Og have benefited from these changes – a better flow, improving the conditions for fish, animals and plants



4

Thames Water has already reduced its abstractions from vulnerable rivers and streams

- Over the past 25 years Thames Water has worked with the Environment Agency to reduce the amount of water it takes from the environment, where the abstraction has been shown to be causing environmental harm:
- TW has already reduced the amount of water abstracted by 134 million litres a day that's about 5% of all water supplied for drinking water.
- Before reducing abstractions TW undertakes investigations to understand the impacts on the environment and the causes of the environmental damage
- In some cases other actions have been implemented to improve the environment – for examples changes to a river's flow which has improved conditions for fish, wildlife and plants (example below):



The Challenge we face

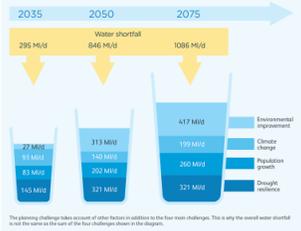
Thames Water forecasts significant pressures on our water resources.

They forecast that we'll need an additional:

- 295 million litres of water per day in 2035
- 846 million litres of water per day in 2050
- over 1000 million litres of water per day in 2075 if we are to have a secure water supply.

To put this into context, Thames Water currently puts around 2.6 billion litres of water into supply for London and Thames Valley every day

This diagram shows the proportion of water that makes up the shortfall - including water that will no longer be taken from abstraction and water needed to reinforce supplies to make us resilient to droughts



The planning challenge takes account of other factors in addition to the four main challenges. This is why the overall water shortfall is not the same as the sum of the four challenges shown in the diagram.

6

	
<p>Title: Proposed investments -Protect the environment 2</p> <p>Day(s) & order: 2.2</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: 2.2</p>	<p>Thames Water have chosen to aim for the highest level of environmental improvements. This is supported by the regulators.</p> <p>Thames Water will be tracking the benefits of the work as it is carried out and will adapt their approach as they learn more.</p> <p>The faster the reduction in abstractions, the better it is for the environment; however this will have a higher impact on bills.</p> <p>Tell us what your thoughts are on this approach and if you agree or disagree with going for the highest level of environmental improvements</p> <p>Probe: How much do they agree with Thames Water’s approach and are there concerns over cost or disruption?</p>
<p>Title: Proposed investments -Protect the environment 3</p> <p>Day(s) & order: 2.3</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: n/a</p>	<p>This is the last activity of the day</p> <p>We have looked at the information about protecting the environment.</p> <p>What have you learnt from the information you have read/listened to today?</p> <p>What did you think was positive and what was negative?</p> <p>What are your views on protecting the environment as part of the water resources management plan?</p>

	<p>Probe: <i>How much do they agree with Thames Water’s approach and are there concerns over cost or disruption?</i></p>
<p>Title: Proposed investments -Make the most of available water</p> <p>Day(s) & order: 3.1</p> <p>Allocation: See red text</p> <p>Task type: Survey</p> <p>Stimulus: Q 1.3</p>	<p>Welcome back - we will continue to look at ways that Thames Water can invest to secure a reliable water source for the future.</p> <p>Today we will look at making the most of available water.</p> <p>Before we look at any information, I would like you to complete this quick quiz. (It’s just a bit of fun so don’t worry about getting it right)</p> <p>Q1. On a scale of 1% to 100%, how much water do you think is lost through leaks in the Thames Water area</p> <p>[Sliding scale]</p> <p>[THAMES WATER AND FUTURE PAYING CUSTOMERS ONLY]</p> <p>Q2. On a scale of 1% to 100%, how much water do you think can be saved per household when they get a smart meter?</p> <p>[BUSINESS CUSTOMERS ONLY]</p> <p>Q2. On a scale of 1% to 100%, how much water do you think can be saved per business when they get a smart meter?</p> <p>[Sliding scale]</p> <p>Q3. Best guess, how many litres of water a day does the average person use in a day?</p>
<p>Title: Using water wisely</p> <p>Day(s) & order: 3.2</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus:</p>	<p>Our first topic today is about using the water we have more wisely</p> <p>Read or listen to the information provided and answer the questions</p> <p>What are your thoughts about this information – is there anything surprising or have you learnt anything new?</p> <p>What are your thoughts about Thames Water’s target being lower than the government’s target? Is this the right thing to do?</p> <p>How important do you think this is this to the overall plan and why?</p> <p>Any other comments about using water wisely?</p>

An average person uses 141 litres per day



Make the most of available water

Using water wisely – helping customers cut down water use to 123 litres per person (on average) per day

- Thames Water have analysed water saving activities in depth. Using tried and tested techniques alongside some more innovative approaches, including experimenting with new water tariffs, they forecast that they can help **customers save around 118 million liters per day by 2050.**
- This will reduce average water use from **141 litres to around 125 litres per person per day.**
- In addition to the actions Thames Water can take, the government is also planning to introduce measures to support long-term, sustainable water use across the UK, including labelling all water-using products, bringing in new standards for these products and updating building regulations for new homes and retrofits.
- Taking government-led and Thames Water actions into account, they forecast that average water use in our area will reduce to around 123 litres per person per day by 2050.



118 million litres of water = 1,475,000 baths

Make the most of available water

The national target

- The government has set a national target to reduce water use to 110 litres per person per day. While Thames Water are committed to supporting the government as it plans for water efficiency, Thames Water are not confident that they/we could achieve this target just yet.
- Setting a too-high goal and not achieving it would threaten the security of our water supply and put more pressure on the environment. It would also force Thames Water to develop alternative sources at short notice, increasing risk and reducing value for you. Instead, Thames Water think it's more appropriate to take a careful, measured approach, monitoring our progress and applying our learnings as we go.



Make the most of available water

Reducing leakage

- Thames Water maintain 20,000 miles of water pipes. Right now, about a quarter of the water supplied is lost through leaks from its own network and customers' pipes.
- Thames Water knows it's not acceptable to be losing so much precious water and they've got a plan to fix it.
- As part of their plan, they'll reduce the amount of water lost through leaks in the network and customer pipes by 16% by 2030 as well as meeting the government's priority of halving leakage by 2050, saving 176 million litres of water per day.
- Thames Water met their target for the last three years, reducing leaks by more than a tenth (from 2017/18 levels).

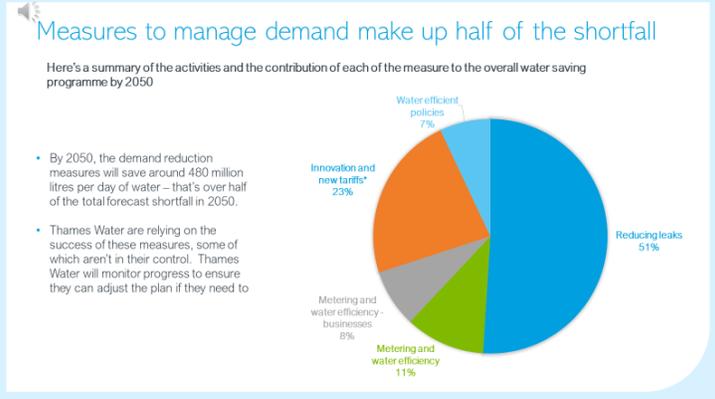
THE CHALLENGE

Thames Water have replaced around 10% of our network this century at a cost of almost £2bn in today's prices. Replacing the entire network would cost upwards of £24bn).

London is busy, congested and a 24/7 city – to replace 1km of water pipe can take 20 weeks – Thames Water need a phased programme as London has to keep moving



<p>Title: Smart Meters</p> <p>Day(s) & order: 3.3</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: Q 3.3</p>	<p>We're now going to look at smart meters – read or listen to the information and answer the questions</p> <p>What are your thoughts about this information – is there anything surprising or have you learnt anything new?</p> <p>How important do you think this is to the overall plan and why?</p> <p>Any other comments about Smart Meters?</p> <div data-bbox="540 449 1252 852" data-label="Complex-Block"> <p>Make the most of available water</p> <h3>Smart Meters</h3> <ul style="list-style-type: none"> • Since Thames Water started their compulsory metering programme in 2015, they've installed over 700,000 smart meters, which means over half of our household customers are now on a meter. • Their work has shown that having a meter could help customers use around 13% less water. • Thames Water will continue to roll out smart water meters to all households in their area, installing or upgrading a further 1,000,000 smart meters by 2030.  </div>
<p>Title: Leakages</p> <p>Day(s) & order: 3.4</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: Q 3.4</p>	<p>Our final topic today is about leakages – read or listen to the information and answer the questions</p> <p>What are your thoughts about this information – is there anything surprising or have you learnt anything new?</p> <p>What are your thoughts about the targets that Thames Water have set to halve leakage by 2050?</p> <p>How important do you think this is to the overall plan and why?</p> <p>Any other comments about Leakages?</p> <div data-bbox="636 1266 1252 1614" data-label="Complex-Block"> <p>Make the most of available water</p> <h3>Reducing leakage</h3> <ul style="list-style-type: none"> • Thames Water maintain 20,000 miles of water pipes. Right now, about a quarter of the water supplied is lost through leaks from its own network and customers' pipes. • Thames Water knows it's not acceptable to be losing so much precious water and they've got a plan to fix it. • As part of their plan, they'll reduce the amount of water lost through leaks in the network and customer pipes by 18% by 2030 as well as meeting the government's priority of halving leakage by 2050, saving 176 million litres of water per day. • Thames Water met their target for the last three years, reducing leaks by more than a tenth (from 2017/18 levels). <p>THE CHALLENGE Thames Water have replaced around 10% of our network this century at a cost of almost £2bn in today's prices. Replacing the entire network would cost upwards of £24bn).</p> <p>London is busy, congested and a 24/7 city – to replace 1km of water pipe can take 20 weeks – Thames Water need a phased programme as London has to keep moving</p>  </div>

	 <p>Measures to manage demand make up half of the shortfall</p> <p>Here's a summary of the activities and the contribution of each of the measure to the overall water saving programme by 2050</p> <ul style="list-style-type: none"> By 2050, the demand reduction measures will save around 480 million litres per day of water – that's over half of the total forecast shortfall in 2050. Thames Water are relying on the success of these measures, some of which aren't in their control. Thames Water will monitor progress to ensure they can adjust the plan if they need to <table border="1"> <caption>Contribution of measures to overall water saving programme by 2050</caption> <thead> <tr> <th>Measure</th> <th>Contribution (%)</th> </tr> </thead> <tbody> <tr> <td>Reducing leaks</td> <td>51%</td> </tr> <tr> <td>Innovation and new tariffs*</td> <td>23%</td> </tr> <tr> <td>Metering and water efficiency</td> <td>11%</td> </tr> <tr> <td>Metering and water efficiency - businesses</td> <td>8%</td> </tr> <tr> <td>Water efficient policies</td> <td>7%</td> </tr> </tbody> </table>	Measure	Contribution (%)	Reducing leaks	51%	Innovation and new tariffs*	23%	Metering and water efficiency	11%	Metering and water efficiency - businesses	8%	Water efficient policies	7%
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<p>Title: Make the most of available water</p> <p>Day(s) & order: 3.5</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus:</p>	<p>The is the last question today</p> <p>Measures to reduce demand for water make up over 50% of Thames Water's forecast shortfall by 2050.</p> <p>Some of the activity is untested and not within Thames Water's direct control and therefore will not solve the whole problem of potential water shortages in the future</p> <p>What do you think of the overall plan to make the most of available water?</p> <p>Do you think this is the right approach?</p> <p>How important do you think it is to consider other measures to ensure that there is a reliable water supply should these measure not deliver the water that Thames Water have forecast?</p>												
<p>Title: Proposed investments -New sources of water</p> <p>Day(s) & order: 4.1</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: n/a</p>	<p>Welcome back – today we will be looking at new sources of water</p> <p>Before we do that, we'd like to know what plans you have already heard of and what you think of them.</p> <p>If you haven't heard of any then just say none and move onto the next task</p>												
<p>Title: Proposed investments -New sources of water</p>	<p>Please look through the following information and then move onto the next activity</p>												

Day(s) & order: 4.2

Allocation: All

Task type: Private discussion

Stimulus: Q 4.2

Water supply solutions

Thames Water need to invest in new sources of water to ensure a secure and sustainable future water supply. Working with others, they've been exploring new options to boost our water supplies

These range from traditional techniques to more innovative approaches and include turning seawater into drinking water (desalination), recycling water, transferring water from other regions and building a large storage reservoir.

Thames Water have assessed every option for cost; water output; the time to deliver the scheme and make the water available; potential impact on the environment; carbon impact; and ability to cope with a changing future.



1

Here are the new sources of water in our area



- New river abstraction at Teddington supported by water recycling
- Groundwater scheme at SouthWest and Greenhithe
- 1910s - 2010
- London Tunnel
- 1970s-2010
- Groundwater scheme at Woodh Farm
- 1910s - 2010
- Groundwater scheme at Addington
- 1910s - 2010
- South East Strategic Reservoir Option (SESRIO)
- 2019-2020
- Groundwater scheme at Hockland
- 1910s - 2010
- Groundwater scheme (modified) at Brentford
- 1910s - 2010
- Groundwater scheme - Mortlake (uncommissioned)
- 1910s - 2010
- Water transfer from Molese Water
- 1910s - 2010
- Water transfer from South East Water
- 1910s - 2010
- Water transfer from TEE Water to Mortlake
- 1910s - 2010
- Aquifer recharge at Norton Kelly
- 1910s - 2010
- Seven Tunnels Transfer - natural river flow with additional water storage
- 1910s - 2010
- Groundwater scheme at Boreham
- 1910s - 2010
- Groundwater scheme at Boreham
- 1910s - 2010
- Groundwater scheme - Mortlake (uncommissioned)
- 1910s - 2010

Transfers within our supply area are not included in the map.

(4.2)

2



Thames Water need to listen to the views of local communities on schemes which could affect them during construction and potentially operation, but they also need to make decisions for society on investment to ensure we have a secure future water supply

3

Title: Teddington Abstraction

Day(s) & order: 4.3

Allocation: All

Task type: Private discussion

Stimulus: Q 4.3

Please read or listen to information and answer the questions below

What have you learned by reading/listening to this information?

What are your thoughts about the abstraction at Teddington (Any positives? Any concerns?)

What are your thoughts about this as a way to ensure we have a consistent water supply in the future?

Please be as detailed with your answer as possible.

Probe: *What are the risks to the environment vs the risks of running out of water?*

Moderator *In the discussions with the local communities, issues and opposition are being raised on some of the proposed schemes from a local perspective, while all valid and TW need to address the points it would be useful to include the feedback in the research in the context of planning the future water supply for the whole TW area, and the wider SE. We need to explore these issues in the research to ensure we get a societal perspective.*

A new abstraction in Teddington, West London

Highly treated recycled water would be moved from Mogden sewage treatment works upstream to compensate for the additional water taken from the river to protect the environment and wildlife. This means water is put into the River Thames upstream of Teddington Weir.

This allows Thames Water to take water for drinking water supply while making sure there is enough water left in the river to protect the fish and wildlife.

Benefits of the scheme

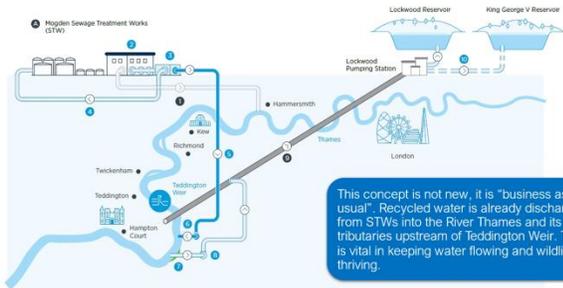
- Drought resistant water supply scheme
- Low cost and low carbon
- Minimal permanent impact on the local area
- Opportunity for biodiversity enhancement

Concerns raised by the local community

- When and how would the scheme be used?
- Would it impact the water quality in the River Thames?
- Would it impact the ecology in the local area, particularly Ham Lands and Eel Pie Island?
- Would it impact navigation, water levels and flows in the river?
- Would it restrict local recreation, particularly water sports?
- What infrastructure would be needed on the local riverbank?

(4.3) 1

A new river abstraction at Teddington



2

A new river abstraction at Teddington

- The wastewater collected from houses and businesses is treated at the sewage treatment works (STW) so that it can be put back safely into the River Thames.
- The treated water is put safely back into the River Thames.
- Upgrade the STW storm tanks to provide the space needed to build a new advanced (tertiary) treatment plant.
- Some of the treated water is diverted and undergoes further treatment at the new advanced (tertiary) treatment plant.
- The waste stream from the further treatment is returned to the main STW for re-treatment.
- The further treated water is pumped via an underground tunnel upstream of Teddington Weir.
- It is put into the River Thames upstream of Teddington Weir. This allows Thames Water to take water from the river for drinking water supply while making sure there is enough water left in the river to protect the fish and wildlife.
- New abstraction on the River Thames. The abstraction point will have screens to protect fish and eels.
- Water is transferred via a new pipeline connection to an existing underground tunnel.
- Existing underground tunnel to transfer water to the Reservoirs in the Lee Valley.
- Potential new underground tunnel to King George V Reservoir.



3

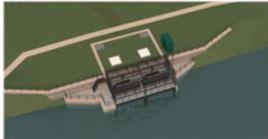
Teddington Infrastructure

Three key components of the scheme

- New treatment plant at Mogden
- Pipeline from Mogden to a new discharge point upstream of Teddington Weir
- New intake and connection to the existing Thames Lee Tunnel



3D illustration of the new treatment plant located over the existing storm tank



3D illustration of the intake on the River Thames

A new treatment plant will add additional levels of treatment to create recycled water.

Additional treatment processes are under investigation to ensure discharge meets strict environmental standards set by the EA

4

Title: Reservoir in Oxfordshire

Day(s) & order: 4.4

Allocation: All

Task type: Private discussion

Stimulus: Q 4.4

Please read or listen to information and answer the questions below

What have you learned by reading/listening to this information?

What are your thoughts about the reservoir (Any positives? Any concerns?)

Do you have any comments on the size of a new reservoir?

What are your thoughts about this as a way to ensure we have a consistent water supply in the future?

Please be as detailed with your answer as possible.

Probe: *What are the risks to the environment vs the risks of running out of water?*

Moderator *In the discussions with the local communities, issues and opposition are being raised on some of the proposed schemes from a local perspective, while all valid and TW need to address the points it would be useful to include the feedback in the research in the context of planning the future water supply for the whole TW area, and the wider*

SE. We need to explore these issues in the research to ensure we get a societal perspective.

South East Strategic Reservoir, located in Oxfordshire

A new storage reservoir – the South East Reservoir Option - would be built in the Upper Thames catchment, south west of Abingdon in Oxfordshire. It would be filled with water from the River Thames during periods of high river flow.

When river levels drop or demand for water increases, water would be released back into the River Thames for re-abstraction downstream

This would help Thames Water protect supplies and manage future water quality issues created by a changing climate. It would also provide regional and local benefits, including environment and biodiversity improvements, public access and recreation.

Benefits of the scheme

Reliable supply of water for use in a drought, providing a shared resource across the South East

Low operational cost and carbon

Opportunities for access, recreation and leisure activities e.g. fishing, walking, sailing

Opportunities for environmental and biodiversity improvements such as new wetland creation

Opportunities for local improvements e.g. local road network, cycle paths, canal restoration

Concerns raised by the local community

Landscape and visual impacts

Impact on the environment and loss of agricultural land

Concern that it would increase local flooding

Safety – confidence in the build and maintenance, as well as an unexpected occurrence

Construction and the associated impact on the local community – noise, dust, traffic movements

1

A new reservoir in Oxfordshire

What size will the reservoir be?

Thames Water evaluated a range of potential reservoir sizes ranging from 75Mm³ (million cubic metres) to 150 Mm³. The regional-led work has shown that we need a reservoir of at least 100 Mm³. If the reservoir is smaller than this, they'd need to introduce additional schemes by 2040, resulting in a more complex, risky and expensive overall plan

100 Mm³ reservoir: Local communities close to the reservoir site are concerned about the reservoir being too big. This option would be a good compromise, as it could blend more into the local landscape while providing extra water and boosting biodiversity in the area.

150 Mm³ reservoir: The size of the reservoir would give us around 50% more water for around the same level of investment and make us extra prepared for the future.

Thames water have opted for 100 Mm³ however Thames Water believe there are important benefits to a larger reservoir that must be considered including the extra reliability and flexibility to cope with the future.



How big is 100 Mm³?
25 Wembley Stadiums
1000 Royal Albert Halls

2

A new reservoir in Oxfordshire



3

Title: Water transfer

Day(s) & order: 4.5

Allocation: All

Task type: Private discussion

Stimulus: Q 4.5

Please read or listen to information and answer the questions below

What have you learned by reading/listening to this information?

What are your thoughts about the Water transfer? (Any positives? Any concerns?)

What are your thoughts about this as a way to ensure we have a consistent water supply in the future?

Please be as detailed with your answer as possible.

Probe: *What are the risks to the environment vs the risks of running out of water?*

Moderator *In the discussions with the local communities, issues and opposition are being raised on some of the proposed schemes from a local perspective, while all valid and TW need to address the points it would be useful to include the feedback in the research in the context of planning the future water supply for the whole TW area, and the wider SE. We need to explore these issues in the research to ensure we get a societal perspective.*

Severn Thames Transfer

The Severn to Thames Transfer would transfer water from the North West and Midlands to the South East for use during a drought. This water would come from the River Severn itself, with Severn Trent Water and United Utilities (water companies in the North West and Midlands) providing additional sources of water if needed. The water would then be moved from the River Severn to the River Thames either by a new pipeline or by a combination of new pipeline and restoring the Cotswold canals.

Benefits of the scheme

Reliable supply of water for use in a drought, with several potential sources
 Provides the backbone water transfer between the North West and South East
 Can provide additional resource – from the river and supplemented from various sources

Concerns raised by the local community

New pipeline across the Cotswolds
 Environmental impact, including water quality and introduction of species between river catchments
 Costly, including energy required to treat and pump flows
 Complicated scheme to build

1

Severn Thames Transfer



Sources of water and new water transfer infrastructure

1. Temporary use of existing United Utilities abstraction from Lake Vyrnwy
2. Water resource deployment at Shrewsbury
3. Treated water from Minworth STW
4. River abstraction at Mythe
5. Treated water from Netheridge STW

New water transfer infrastructure

6. Pipeline to bypass the River Vyrnwy
7. Pipeline from Gloucestershire to Oxfordshire (preferred option)
8. Pipeline and restoration of the Cotswold canals (alternative option)
9. Water abstracted from the River Severn in Gloucestershire
10. Water released into the River Thames in Oxfordshire

2

Title: Timings of plan

Day(s) & order: 4.6

Allocation: All

Task type: Private discussion

Stimulus: Q 4.6

Here are the timings of the plan

What are your thoughts overall about the plan?

Is this the right approach or do you have any doubts?

How necessary do you think this is for the future of our water supply?

Remember, there are no right or wrong answers, we would just like your honest opinions.

	<p>When the new water resources could be ready </p>  <p>Why this order?</p> <ul style="list-style-type: none"> Thames Water needs to improve the resilience and reliability of our water supply by the early 2030s. The Teddington abstraction will help keep the River Thames flowing and can be introduced within eight years, helping to achieve a reliable water supply. Other schemes have been considered (such as a water recycling scheme in Beckton, East London) but these are more expensive. A new storage reservoir and a water Transfer will both be needed to secure a reliable water supply in the future however a storage reservoir is the better first option due to the lower running costs, lower carbon emissions and readily available water reserves when needed, whereas water from the Transfer could take up to four weeks to arrive. <p style="text-align: right;">1</p>									
<p>Title: The plan</p> <p>Day(s) & order: 5.1</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: n/a</p>	<p>This is the last day of our community – for this first activity we would like you to summarise your thoughts on what you have learnt</p> <p>(Include stim pg 43)</p> <p>What are your thoughts on the plan as a whole?</p> <p>How necessary do you think it is?</p> <p>What parts of the plan do you agree with?</p> <p>What do you disagree with?</p> <p>Tell us in detail what feedback you have about the plan.</p> <p>Thames Water's plan will provide for society, the economy and the environment </p> <table border="1" data-bbox="581 1096 1263 1386"> <thead> <tr> <th data-bbox="581 1096 792 1138">Society</th> <th data-bbox="815 1096 1026 1138">Economy</th> <th data-bbox="1049 1096 1263 1138">Environment</th> </tr> </thead> <tbody> <tr> <td data-bbox="581 1146 792 1234">  </td> <td data-bbox="815 1146 1026 1234">  </td> <td data-bbox="1049 1146 1263 1234">  </td> </tr> <tr> <td data-bbox="581 1243 792 1386"> <ul style="list-style-type: none"> Thames Water are future proofing against a changing climate and more extreme droughts They're making sure we have a reliable water supply for now and future generations </td> <td data-bbox="815 1243 1026 1386"> <ul style="list-style-type: none"> Water restrictions (like rationing water) could cost London's economy around £500 million each day Thames Water plan to invest £13 billion over the next 25 years to improve water supply reliability </td> <td data-bbox="1049 1243 1263 1386"> <ul style="list-style-type: none"> Thames Water will take over 500 million litres less water per day from sensitive rivers and waterways by 2050 They'll boost wildlife and plant biodiversity by 10% through new wetlands and habitats </td> </tr> </tbody> </table>	Society	Economy	Environment				<ul style="list-style-type: none"> Thames Water are future proofing against a changing climate and more extreme droughts They're making sure we have a reliable water supply for now and future generations 	<ul style="list-style-type: none"> Water restrictions (like rationing water) could cost London's economy around £500 million each day Thames Water plan to invest £13 billion over the next 25 years to improve water supply reliability 	<ul style="list-style-type: none"> Thames Water will take over 500 million litres less water per day from sensitive rivers and waterways by 2050 They'll boost wildlife and plant biodiversity by 10% through new wetlands and habitats
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<p>Title: What is the cost?</p> <p>Day(s) & order: 5.2</p> <p>Allocation: All</p> <p>Task type: Private discussion</p> <p>Stimulus: 5.2</p>	<p>Please read or listen to information and answer the questions below</p> <p>Looking at the costs, what are your thoughts about the plan delivering the best value for you, your community and the environment? Please keep in mind that these costs are just for the water part of your bill – the wastewater part of the bill may also need to change in the future to cover initiatives ensuring a reliable wastewater service and to protect the environment.</p>									

Also, as a reminder and for context, the average household water and wastewater bill for Thames Water customers will be £456 in 2023-24 (so that amount may be higher or lower for different customers, depending on things like having a water meter). Finally, inflation is not included in the future water costs we're showing.

How do you feel about the increases to the water part of the bill, based on everything you've read?

The plan must be affordable

- The cost of investing in our future water supply as set out in this plan is around £13 billion – between 2025 and 2050.
- Most of Thames Water's investments are funded through customers' bills
- This means a gradual increase in annual bills from 2025 to 2035 of up to around £37 per year by the end of the 10 year period, rising to around £100 a year increase by 2050

Water bills change each year in line with inflation. Inflation is the increase in prices paid for goods and services over time. Household incomes also change over time.

If your household income keeps up with inflation (i.e. increases at the same rate) then you are likely to notice little difference in what you are paying for things.

If inflation increases by a faster rate than your household income, then you are likely to have less money to go around.

If your household income increases by a faster rate than inflation, then you are likely to have more money to go around.

The Bank of England aims to keep inflation at 2%, but it has recently been much higher than this.

As well as changing by inflation each year, bills change by an amount set by Ofwat as part of their price review process every five years.

The proposed bills you will see from 2030 to 2050 EXCLUDE the Bank of England forecasts for inflation.

Increase (£) in average household bill

	2030	2035	2040	2045	2050
Best value plan	£14	£37	£65	£80	£100

Title: Talk about it with the community

Day(s) & order: 5.3

Allocation: All

Task type: Group discussion

Stimulus: 5.3

For this last activity, we would like to give you the opportunity to discuss your views with the other people taking part.

Please talk to each other about what you have read and any positives or concerns you have about the plan or any questions you may have about the information you have been through.

13.2 SCREENING QUESTIONNAIRE

Thank you for your interest in taking part in our research on the topic of water resource management.

Please click below to get started.

SECTION A – SCREENING

PIPE IN FROM CUSTOMER VOICES

- **Gender**
- **Age**
- **Employment Status**
- **London**
- **WRZ**
- **Vulnerable**
- **NPS**
- **Ethnicity**

ASK ALL – Single Code – DO NOT RANDOMISE

A1a. We are looking for people to take part in research which will involve logging into a text-based community and completing some activities. The activities will involve reading information about ways in which Thames Water are looking to ensure that customers have a consistent and reliable water supply in the future and then giving your opinions on these possible solutions.

The community will be live from Thursday 9th and Monday 20th March, and we anticipate that it will take a maximum of 90 minutes in total to complete all of the activities.

If you are selected and complete all the activities, you will receive a £50 Voucher Express voucher for your time. We will let you know by Wednesday 8th March if you have been chosen to take part.

Are you willing and available to take part?

1. Yes, I am free, and I'd like to take part.
2. No, I cannot take part **GO TO END/SCREENOUT TEXT**

ASK ALL – Single Code – DO NOT RANDOMISE

A1b. The online community will be hosted by our trusted third-party supplier, Recollective.

Please note that your email address will be shared with Recollective, in order for you to be invited to join the community. Comments, activity results, videos and images you choose to upload/share during the community will be held on the Recollective platform for 3 months.

To read Recollective's privacy policy, please click here **Recollective**
(<https://recollective.com/privacy>)

We may also share comments, videos and images with Thames Water which will be used to help them make decisions on water resource management. You can read their privacy policy here <https://www.thameswater.co.uk/legal/privacy-policy>.

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

1. Yes, I am happy for you to share my details and any comment / video / image contact I upload **GO TO Q1**
2. No, I am not willing for you to share my details and any comment / video / image contact I upload *(This means you will not be able to take part in this research)* **GO TO END/ SCREENOUT TEXT**

Please note that there are a activities in this community, but you will be able to submit these as your answers in these ways if you wish.

ASK ALL – MULTICODE – DO NOT RANDOMISE

Q1. The research will be conducted on an online platform – what device are you likely to use to complete the research if you are selected? (Tick all that apply)

1. Smart phone
2. Tablet
3. Laptop/PC
4. None of the above **(ANCHOR, EXCLUSIVE, SCREEN OUT)**

ASK ALL – SINGLE CODE –RANDOMISE

Q2a. Which of the following best describes your current working status?

1. Retired
2. Stay at home parent
3. Employed full time
4. Employed part time
5. Self employed
6. Run my own business
7. Full time student
8. Part time student
9. Currently unemployed
10. Other (Write in) **(OPEN) (ANCHOR)**
11. Rather not say. **(ANCHOR)**

ASK Q2a = 3 or 4 or 5 or 6 – SINGLE CODE –RANDOMISE

Q2b. Who provides water for your business address?

1. Thames Water
2. Southern Water **(Go to Q3)**

3. Anglian Water (**Go to Q3**)
4. Severn Trent Water (**Go to Q3**)
5. Affinity Water (**Go to Q3**)
6. South East Water (**Go to Q3**)
7. Other (Write in) **OPEN (Go to Q3)**
8. Don't know/rather not say. (**Go to Q3**)

ASK Q2a =3 or 4 or 5 or 6 and Q2b = 1/ SINGLE CODE – DO NOT RANDOMISE

Q2c. At your business, are you responsible for managing utilities suppliers including water?

1. Yes
2. No (**Go to Q3**)

ASK Q2a =3 or 4 or 5 or 6 and Q2b = 1 and Q2c = 1 / SINGLE CODE – DO NOT RANDOMISE

Q2d. What size is the business that you own/work for?

1. 1-49 people
2. 50 – 99 people
3. 100 + people
4. Don't know/ rather not say.

ASK Q2a =3 or 4 or 5 or 6 and Q2b = 1 and Q2c = 1 / SINGLE CODE – DO NOT RANDOMISE

Q2e. What type of business do you own/work for?

1. Academic
2. Agriculture
3. Automotive
4. Clerical
5. Banking and Financial services
6. Construction and building
7. Engineering
8. Food and drink
9. Healthcare
10. IT
11. Manufacturing and processing
12. Media/Entertainment
13. Pharmaceutical
14. Retail
15. Risk
16. Security
17. Telecoms/Tech
18. Travel/Tourism
19. Transport and logistics
20. Waste and Recycling
21. Other (write in) **OPEN**

ASK Q2a =3 or 4 or 5 or 6 and Q2b = 1 and Q2c = 1 / DO NOT RANDOMISE

Q2f. How does your organisation mainly use water?

Tick all that apply.

1. The manufacturing process which is essential to the running of your organisation (e.g. to power machinery, agricultural production etc.)
2. The supply of services your organisation provides (e.g. cleaning services, hairdressers etc.)
3. An ingredient or part of the product or service your organisation provides (e.g. food or drink, chemical, cosmetics manufacturer etc.)
4. Normal domestic use for your organisation's customers and employees (e.g. customer toilets, supply of drinking water)
5. None of the above **ANCHOR**
6. Don't Know **ANCHOR**

Hidden Variable Business customer – Q2a = 3 or 4 or 5 or 6/ Q2b = 1/Q2c = 1/Q2d = any/Q2e = any

ASK ALL – SINGLE CODE

Q3a. To what extent do you agree or disagree with these statements?

Please select one answer

TOP BREAKS, RANDOMISE

1. I believe that it's important to conserve water as much as possible in the home
2. I have a good understanding of how Thames Water processes and treats the water that comes through our taps
3. I feel that my water and sewerage bill from Thames Water represents good value
4. We have plenty of water in the Thames Water region to serve the population that lives here
5. A water meter is a good way to help you save money on your water bills
6. My tap water is of good quality and safe to drink
7. I much prefer to drink bottled water rather than tap water
8. It's important for every household and business to invest in ways to reduce water wastage for environmental reasons (for example installing water saving shower heads or water flow restrictors)

DOWNBREAKS/ SINGLE CODE

1. Strongly agree
2. Slightly agree
3. Neither agree nor disagree
4. Slightly disagree
5. Strongly disagree

Q3b. Please indicate the extent to which you agree or disagree with the following statements that other people have made about Thames Water.

TOP BREAKS, RANDOMISE

1. I trust Thames Water to provide water and wastewater services
2. It's easy to deal with Thames Water
3. I have a good relationship with Thames Water
4. Thames Water is a fair and honest company

DOWNBREAKS/ SINGLE CODE

1. Strongly agree
2. Slightly agree
3. Neither agree nor disagree
4. Slightly disagree
5. Strongly disagree

Q4. Tell us in a couple of sentences about your thoughts on saving water in your home.

We'll need a few details from you to set you up on our community platform if you are selected. Please complete the details below.

ASK ALL, OPEN TEXT

C3b. Finally, please choose a username to use for the duration of the pop-up community. You can choose whichever username you like, but please be sure not to make it something that identifies you personally, e.g. a combination of your first and last name.

Don't worry about remembering your username: we will confirm it if you take part in the community. We'll also be sure to amend any usernames that identify you personally, to protect your identity.

OPEN TEXT BOX.

SCREEN OUT CONDITION: I'm afraid you don't qualify for this study but please keep an eye out for new projects coming soon.

Closing text

Thank you for your interest. If you are chosen to take part, we will contact you via email by Wednesday 8th March.

13.3 IGNITE AI

Ignite AI provides a nuanced read of emotionality & positivity

Ignite AI provides objective, consistent reading of the sentiment and emotion contained with text and imagery.

Emotions predict consumer behaviour, so understanding mindset is critical for creating resonant brands, products and services.

Ignite AI evaluates the overall sentiment and strength of feeling in any body of content, as well as deeper insight into emotional state.

Reading the 8 main emotions - Joy, Sadness, Anticipation, Trust, Anger, Surprise, Disgust - alongside 22 high & low valence emotional states, including delight, admiration, frustration and anxiety.

Result: A more nuanced understanding of the emotional spectrum being transmitted or received by consumers through your brand, content and communications.



How Ignite AI optimises our thinking

TAKE ANY DATA SOURCE

Ignite AI reads anything from single items to millions of datapoints. Tik Tok videos, Amazon reviews, survey responses, focus group transcripts ... Here, we'll tell it to read text responses from the pop-up community.

LET THE MACHINE DECODE IT

Our machine learning models will decode every piece text. The software surfaces naturally emerging patterns, emotions similarities & themes across the content. Rigorously, objectively and quickly.

QUICKLY IDENTIFY INSIGHTS

The data will then be summarised into visual metrics & maps, which we can access via interactive dashboards. This allows us to quickly zero in on areas of interest, expand our thinking and confidently identify data-driven insights.



DATA

DECODE

INSIGHTS