



Thames Water Customer Voices

Vision 2050 research

May 2022

Report prepared by Verve

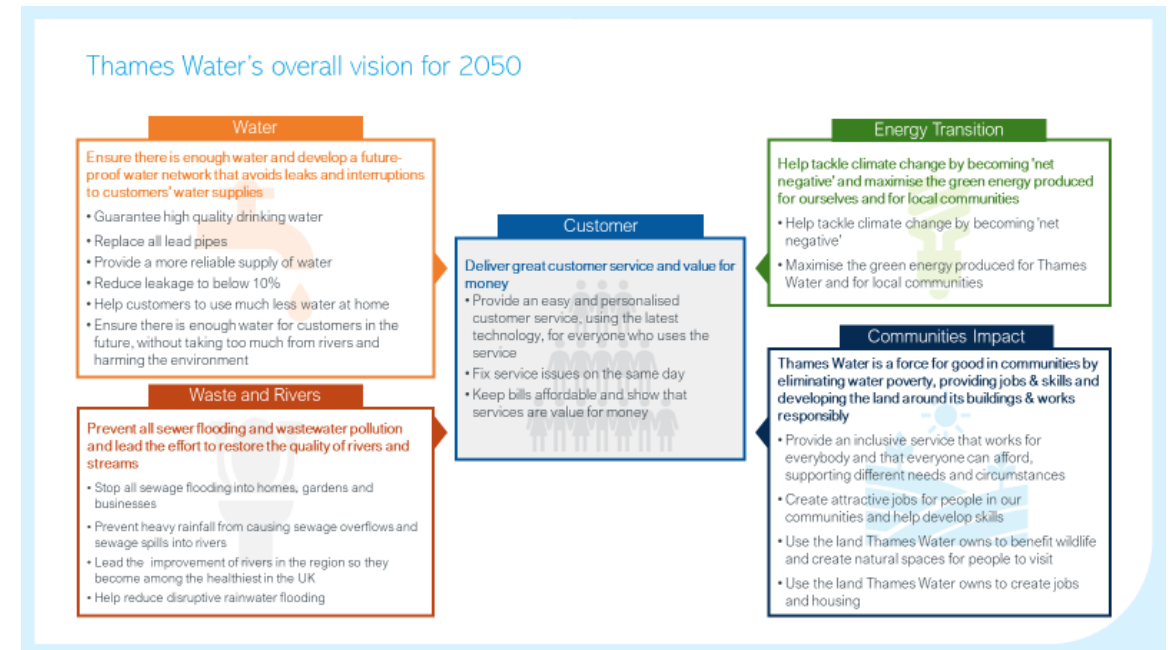




Background and methodology

Background (1): Vision 2050

- Thames Water has developed a strategic vision known as Vision 2050, rooted in existing customer and stakeholder insights.
- This details all goals of core service and additional goals that Thames Water aspires to meet by 2050, in the form of customer outcomes.
- The main purpose of the research is to test if Thames Water has accurately interpreted customers' expectations and understand how customers prioritise these various outcomes. This will influence the planning and delivery of the outcomes.
- The language in the 2050 vision was modified to be more customer friendly. The next slide shows the original version; the slide following shows the customer facing version used in the research.
- Following evaluation of the plan overall, customers evaluated each goal of the plan separately.



Background (2): Vision 2050 in its original form

Water

Solve water scarcity and develop a resilient network for our customers that avoids supply interruptions and leaks

- Guarantee an uninterrupted service with leakage % in single digits
- Guarantee high quality drinking water
- Eliminate all lead pipes
- Enable customers to reduce average water consumption by ~30-40% (PCC under 110l/d)
- Secure sufficient water supply to meet future demand without damaging environmentally sensitive sources

Waste and Rivers

Prevent all sewer flooding and wastewater pollution; lead the wider effort to restore our water courses

- Eradicate sewer flooding, especially in homes, gardens and businesses, including stopping 'unflushables'
- Build resilience against stormwater to stop all pollutions, sewage overflows, and sewage spills into rivers, across the entire network
- Lead the improvement of the environment and cleanup of rivers in our region to become among the healthiest in the UK
- Support efforts to reduce damaging river flooding

Customer

Deliver great service and value for all customers, build passion for water saving and cleaning up waste

- Provide an effortless service that is personalised and digitally enabled
- Fix service issues the same day
- Keep bills low vs incomes and show that our services are value for money
- Motivate customers to adopt efficient appliances and digital tools to save water and waste
- Treat everyone who consumes our services as a customer and partner with others (retailers, NAVs, property developers, etc.) to reach them
- Continuously evolve the customer service experience, embracing digital innovation, partnering with new market entrants and adapting to changing consumption patterns

Energy Transition

Maximise the green energy we produce for ourselves and local communities

- Achieve our net-negative carbon strategy
- Become a major producer of green energy using multiple technologies, creating 3 TWh+ production
- Drive the energy transition beyond the Thames' footprint, building specialist businesses where we have competitive advantage, and ensuring our supply is truly renewable

Communities Impact

Be a force for good: eliminate water poverty, lead in re/up-skilling communities and develop land assets responsibly

- Provide inclusive service and ensure water is affordable
- Create attractive and diverse employment opportunities; drive change in our supply chain and beyond
- Take leading role in re-/upskilling our communities
- Implement a balanced land-use strategy, delivering investment, local jobs, biodiversity gain and access to nature-based recreation
- Deliver property-related projects with inherent sustainability and social value to address societal issues such as affordable housing

Note: please see 2050 Vision for more details and key assumptions

Background (3): Vision 2050 simplified as presented to customers

Water

Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

- Guarantee high quality drinking water
- Replace all lead pipes
- Provide a more reliable supply of water
- Reduce leakage to below 10%
- Help customers to use much less water at home
- Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment

Waste and Rivers

Prevent all sewer flooding and wastewater pollution and lead the effort to restore the quality of rivers and streams

- Stop all sewage flooding into homes, gardens and businesses
- Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers
- Lead the improvement of rivers in the region so they become among the healthiest in the UK
- Help reduce disruptive rainwater flooding

Customer

Deliver great customer service and value for money

- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Fix service issues on the same day
- Keep bills affordable and show that services are value for money

Energy Transition

Help tackle climate change by becoming 'net negative' and maximise the green energy produced for ourselves and for local communities

- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities

Communities Impact

Thames Water is a force for good in communities by eliminating water poverty, providing jobs & skills and developing the land around its buildings & works responsibly

- Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit
- Use the land Thames Water owns to create jobs and housing

Background (4)

Setting the scene for the research

- Foundational research for Thames Water's PR24 (price review) programme was completed by Verve in October 2021 and this discussed in detail what customers want from Thames Water and what their core expectations are.
- Deep dive research into eight potential enhancement areas for PR24 was then completed by Verve in April 2022. Customers discussed in detail what they thought of Thames Water's proposed initiatives for 2025-30.
- This latest research looks further to the future, examining the 2050 Vision that Thames Water have developed, and the strategic roadmap to achieve this (including what needs to happen in the next planning cycle of 2025-30), as well as Thames Water's proposed public value framework. Detailed objectives for the Vision 2050 element of the research are shown in the red box below:

1.Views on Vision 2050 strategic ambitions and priorities to build into the development of the strategic roadmap	Objectives	Test Vision 2050 ambitions	Understand priorities	Ensure the Strategic Roadmap is comprehensive	Understand what is important for AMP8
		What is the right destination (ambition) for 2050?	When should we achieve the Vision 2050 ambitions by? 2050 or sooner?	Are there any gaps in the Vision 2050 ambitions?	Given where Thames Water are, which area is most important to improve in? What is most urgent?
2.Understanding customer and stakeholder views on public value	Objectives	Understand importance of public value	Understand public value priorities	Understand their views on Thames Water role in delivering public value	Understand what they expect Thames Water to do/not do
		How important are the wider benefits we deliver for communities and the environment	What types of public value (examples) would they prioritise?	Do they think it's Thames Water's role to deliver public value?	Where should Thames Water activities stop?

- The latest research was conducted by Verve using online qualitative and quantitative methodologies.

Overall methodology (see appendix for sampling details and separate document for questions/stimulus used)

1) Informed panel customers

- 60 customers
- Recruited from the Thames Water Customer Voices panel
- All closely representative of Thames Water's geographic and demographic customer makeup as possible
- A six-day community, 7-14th April 2022
- 30-40 minutes of activity per day
 - Five days evaluating Vision 2050
 - One day evaluating public value
- Qualitative and 'semi-quantitative' outputs, with customers undertaking prioritisation exercises, identical to the quantitative survey, for comparison
- 'Informed' by prior research activities, covering some of the same issues and the concept of planning for the future

Qualitative online community



2) Informed 'fresh' customers

- 70 customers
- Recruited from external sources; less well informed on Thames Water's activities having not undertaken prior activities on the panel
- All closely representative of Thames Water's geographic and demographic customer makeup as possible
 - Including 20 business and 10 future customers (18-24 year olds)
- Identical activities and fieldwork dates to the Informed panel customers
- Qualitative and 'semi-quantitative' outputs, with customers undertaking prioritisation exercises, identical to the quantitative survey, for comparison
- 'Informed' by materials presented during the community

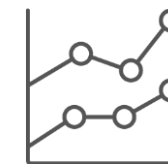
Qualitative online community



3) Uninformed household (HH) and business (NHH) customers

- 600 customers
- Provided by an external panel
- Representative of Thames Water's customer base
- 500 household and 100 business customers
- 19-27th April 2022
- 10 minute online questionnaire
 - Prioritising Vision 2050 goals
 - Rating public value activities
- 'Uninformed' due to lack of in-depth material on the issues (headline outcomes only)
- Quantitative outputs only

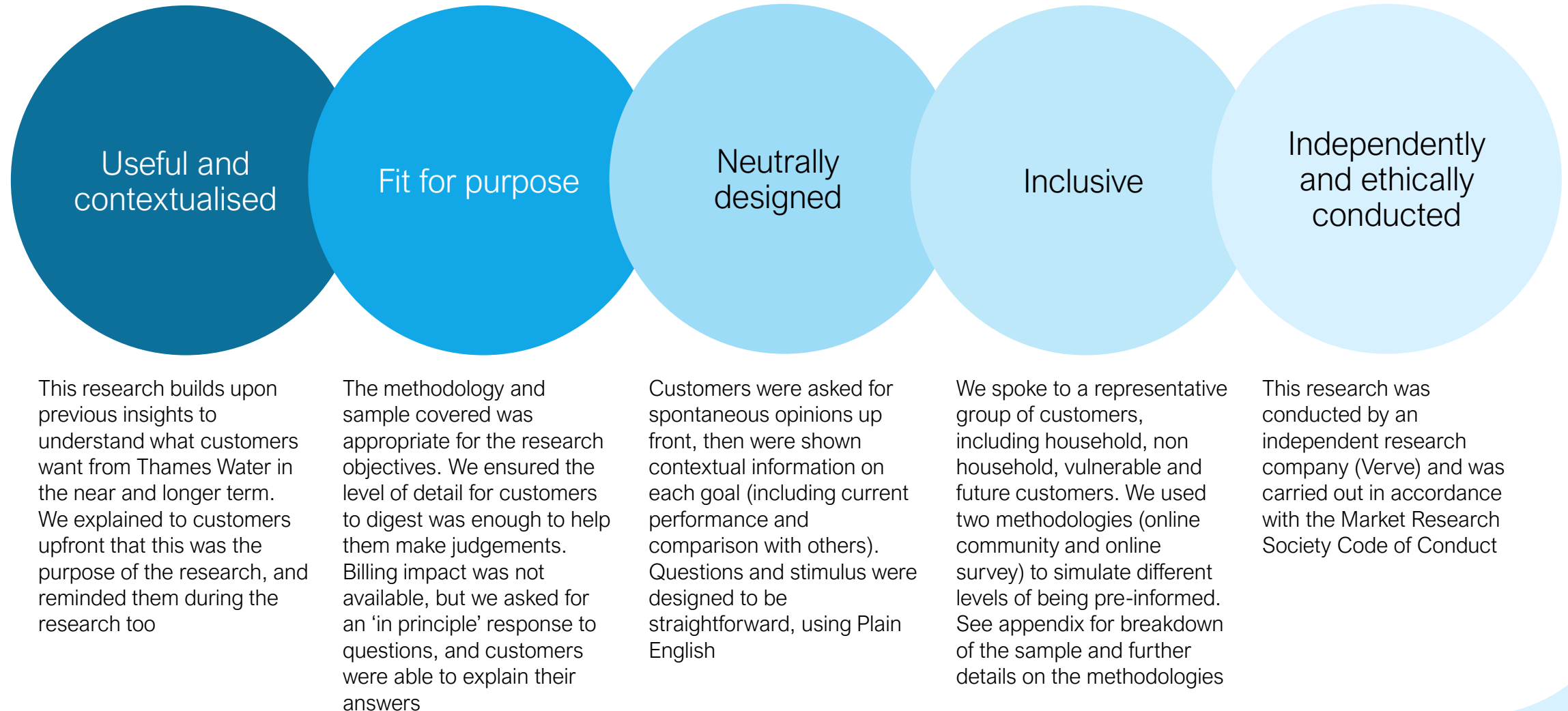
Quantitative online survey



Combined reporting highlighting overall findings and individual audience differences

Methodology (see appendix for further details and separate document for screener/questions/stimulus)

This research represents **high quality engagement**, meeting Ofwat's minimum standards





Executive Summary

Vision 2050

Based on both qualitative and quantitative findings

Vision 2050 - overview of key objectives

Test Vision 2050 ambitions

What is the right destination (ambition) for 2050?

- Most customers are in support of the overall vision for 2050 and felt all 5 of the strategic themes to be of importance.

Understand what is important for AMP8

Given where Thames Water are, which area is most important to improve in? What is most urgent?

- The most important area for the vast majority of customers was attributed to the area of 'Water'.
- Customers scored vision 2050 goals centred around 'Water' as the most important .

Understand priorities

When should we achieve the Vision 2050 ambitions by? 2050 or sooner?

- Customers are satisfied with the Vision 2050 goals but felt some could be achieved a lot sooner.
- Environment related goals, although important, were felt to be less urgent.
- Quantitative data indicates that Water & Waste are rated as most important an in urgent need for improvement.

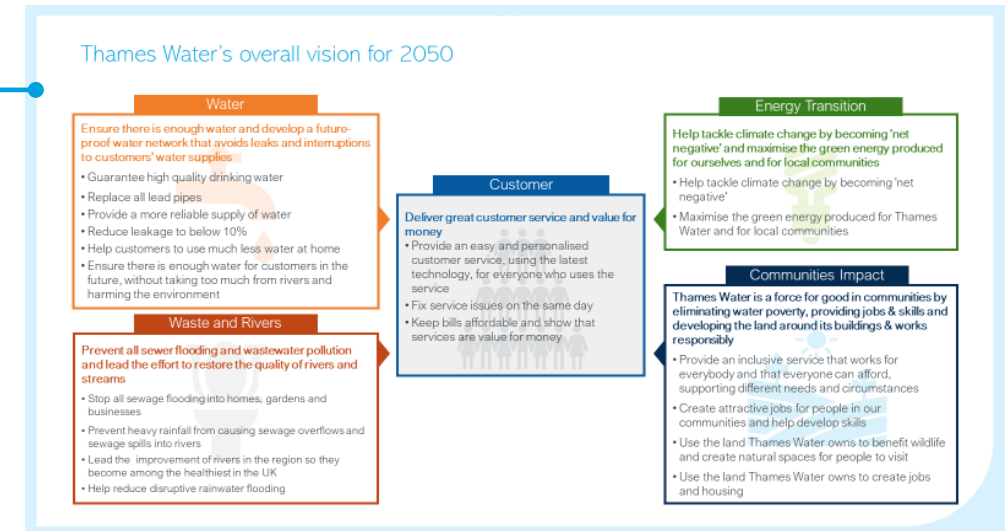
Ensure the Strategic Roadmap is comprehensive

Are there any gaps in the Vision 2050 ambitions?

- Overall customers felt Vision 2050 was comprehensive enough for them and had nothing to add.
- Those with less experience of the water industry put their trust in Thames Water's vision and consideration for customers.
- A minority wanted more detail and clarity of each goal.

Customer evaluation of Vision 2050

- Evaluation of Vision 2050 was a three stage process
 1. Customers initially viewed a schematic of Vision 2050, featuring all of the goals broken down into each of the themes. The Vision was evaluated as a whole and customers were asked to prioritise the themes in order of importance
 2. Each goal within the themes was then evaluated using a templated explanation including topic, current performance, comparison against other water companies and goal for 2050
 3. Customers then conducted a quantitative exercise where each goal was evaluated in terms of both importance to customers personally and perceived urgency for improvement based on the information provided. This was then charted as an overall importance vs. urgency for improvement matrix



Guarantee high quality drinking water

What is this about?

- There are rare instances when drinking water does not meet the strict safety and quality standards expected.

Where are Thames Water now

- Last year there were 5 instances of unsafe water quality across the Thames Water region which meant the water supply was turned off temporarily in local areas.

How do Thames Water compare to other water companies?

- Thames Water's water quality levels are close to the average compared with other water companies in the country.

Where do Thames Water want to be by 2050

- Zero instances of unsafe water quality.

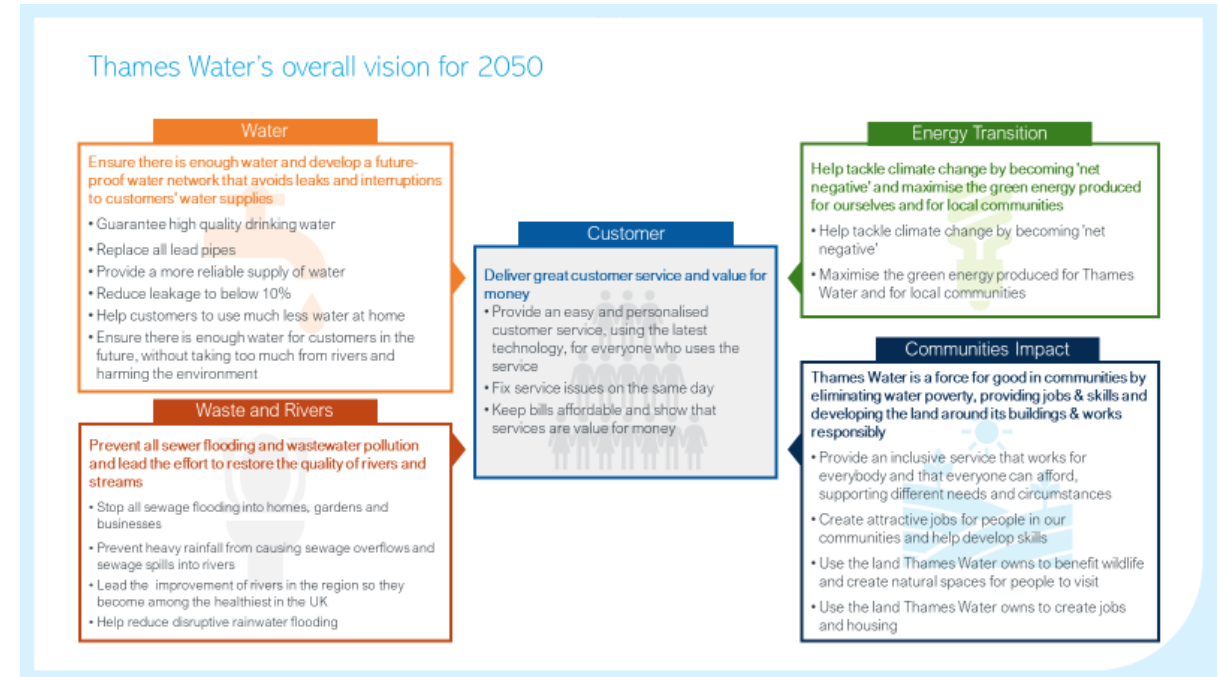
This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- Improve the water treatment process using new technology as it is developed.
- Improve the quality of water sources (rivers and underground).
- Keeping up with new safety standards that may develop.
- Keeping up with potential new water contaminants.

Overall, the vast majority of customers support Thames Water's 2050 strategic goals and the methods to get there

- Customers think all the Vision 2050 goals are important and should be a focus for improvement, though some are prioritised more than others.
- Greatest importance is attributed to the Water theme – seen as Thames Water's core responsibility and essential for society. Goals prioritised include:
 - Guaranteed high quality water
 - Ensuring there is enough water in the future without taking too much from rivers
 - Reducing leaks..
- Customers also emphasise keeping bills affordable, and stopping sewage flooding into homes and spilling into rivers.
- Energy transition, customer service and community-orientated initiatives are important, positive and worthwhile, but not at the expense of Thames Water's core mission.



Given where Thames Water are, which area is most important to improve in? What is most urgent

The area of 'Water' was the most important area to improve on for the vast majority of customers

- Most importance was attributed to the area of 'Water' i.e. future proofing the core water network to ensure customer water supplies were safe and plentiful
- Top five 2050 Vision goals by importance:
 1. Guarantee high quality drinking water **(8.83)**
 2. Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment **(8.57)**
 3. Stop all sewage flooding into homes, gardens and businesses **(8.47)**
 4. Reduce leakage to below 10% **(8.42)**
 5. Keep bills affordable and show services are value for money **(8.41)**

Based on means score out of ten attributed to 'importance' with '0' being not very important at all to '10' being extremely important

For context, prior to this question customers had been told: 'We'll be asking you to prioritise these goals based on what you think about each one in principle. In other words, do you think each goal is even an issue, do you care about it, do you agree with the ambition and the timescale of 2050. It's important that you remember that Thames Water fund their activities using money from customers' bills. We're really interested to hear what you think about each goal, but please don't worry about what each individual goal might cost'.






(Base: 711, all informed qual and uninformed quant respondents)

Generally, customers believe that the timescales for Vision 2050 are reasonable but if possible, would like some to be accelerated

When should we achieve the Vision 2050 ambitions by? 2050 or sooner?

- Many customers want the goals to be achieved as fast as possible. Complexity of deliverability was not considered in this research.
- Goals related to the environment, while important, were generally felt to be less urgent than goals that customers will benefit from personally
- *The findings opposite refer to data collected in the qualitative community stage only (as not asked in the quantitative stage)*

Goals:

	Water
	Waste/Rivers
	Customer
	Energy
	Communities Impact

Goals the majority of customers wanted to see achieved before 2050 if possible

- **Guarantee high quality drinking water**
- **Stop all sewage flooding into homes gardens and businesses**
- **Reduce leakage to below 10%**
- **Keep bills affordable and show that services are value for money**
- **Fix service issues on the same day**
- **Help reduce disruptive rainwater flooding**
- **Provide an inclusive service that works for everybody and that everyone can afford,**
- **Provide an easy and personal customer service, using the latest technology, for everyone who uses the service**
- **Create attractive jobs for people in our communities**

Goals the majority of customers felt were 'just right' to be achieved by 2050

- **Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment**
- **Provide a more reliable water supply**
- **Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers**
- **Replace all lead pipes**
- **Lead the improvement of rivers in the region so they become among the healthiest in the UK**
- **Maximise the green energy produced for Thames Water and for local communities**
- **Help tackle climate change by becoming 'net negative'**
- **Help customers to use much less water**
- **Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit**
- **Use the land Thames Water owns to create jobs and housing**

Both lists ordered by overall importance - highest to lowest (order based on all 711 responses to the importance question)

Quantitative data shows 'Water' & 'Waste' goals tend to be rated as more important and urgent for improvement; but all goals are deemed important (7+ out of 10)

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (All qual and quant responses - 711)

Urgency for improvement
On a scale of 0 to 10, where 0 is not at all urgent to make the improvements and 10 is very urgent to make the improvements, how urgent is it that Thames Water makes the improvements for each of the goals.

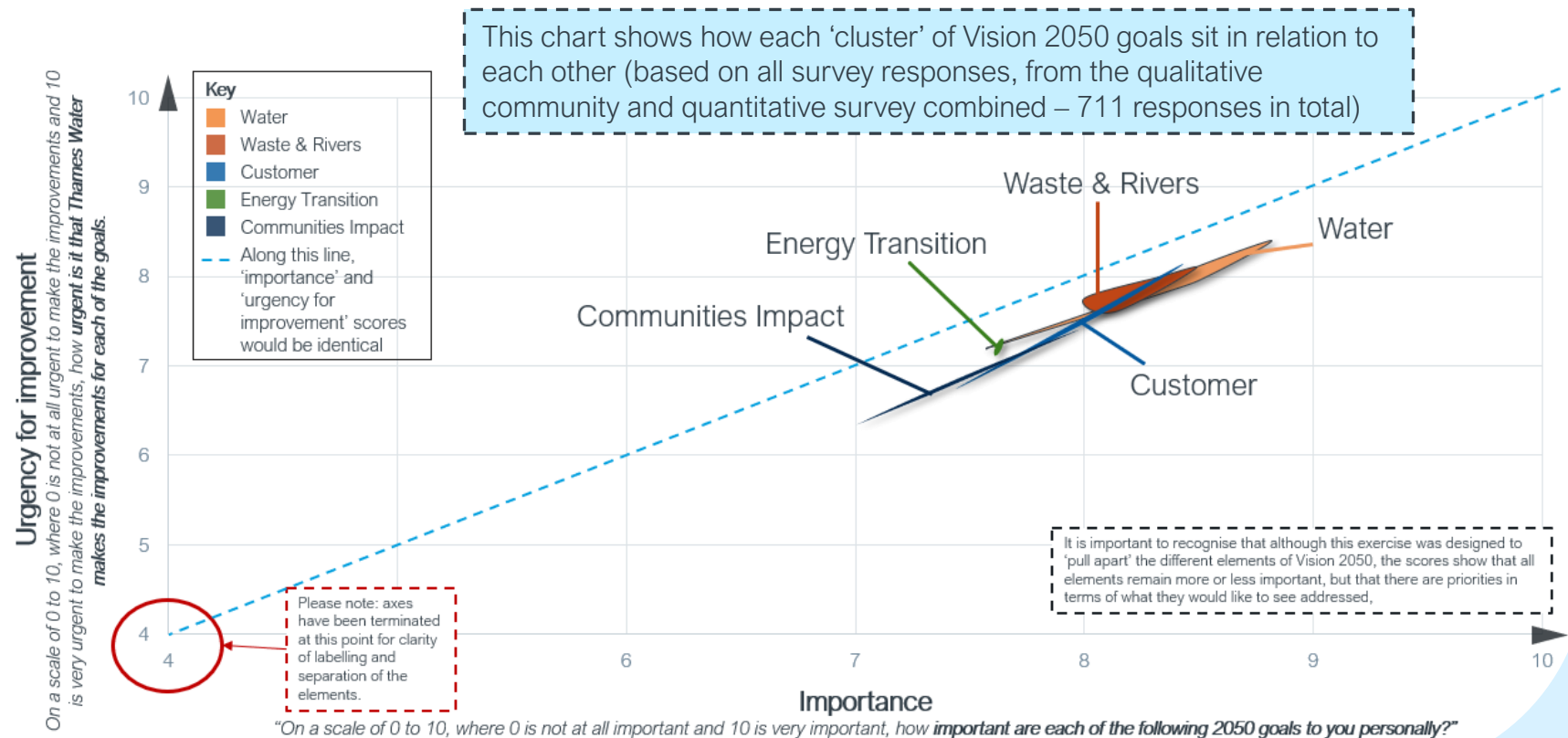


"On a scale of 0 to 10, where 0 is not at all important and 10 is very important, how important are each of the following 2050 goals to you personally?"

Quantitative data shows a relatively clear prioritisation of Vision 2050 goals

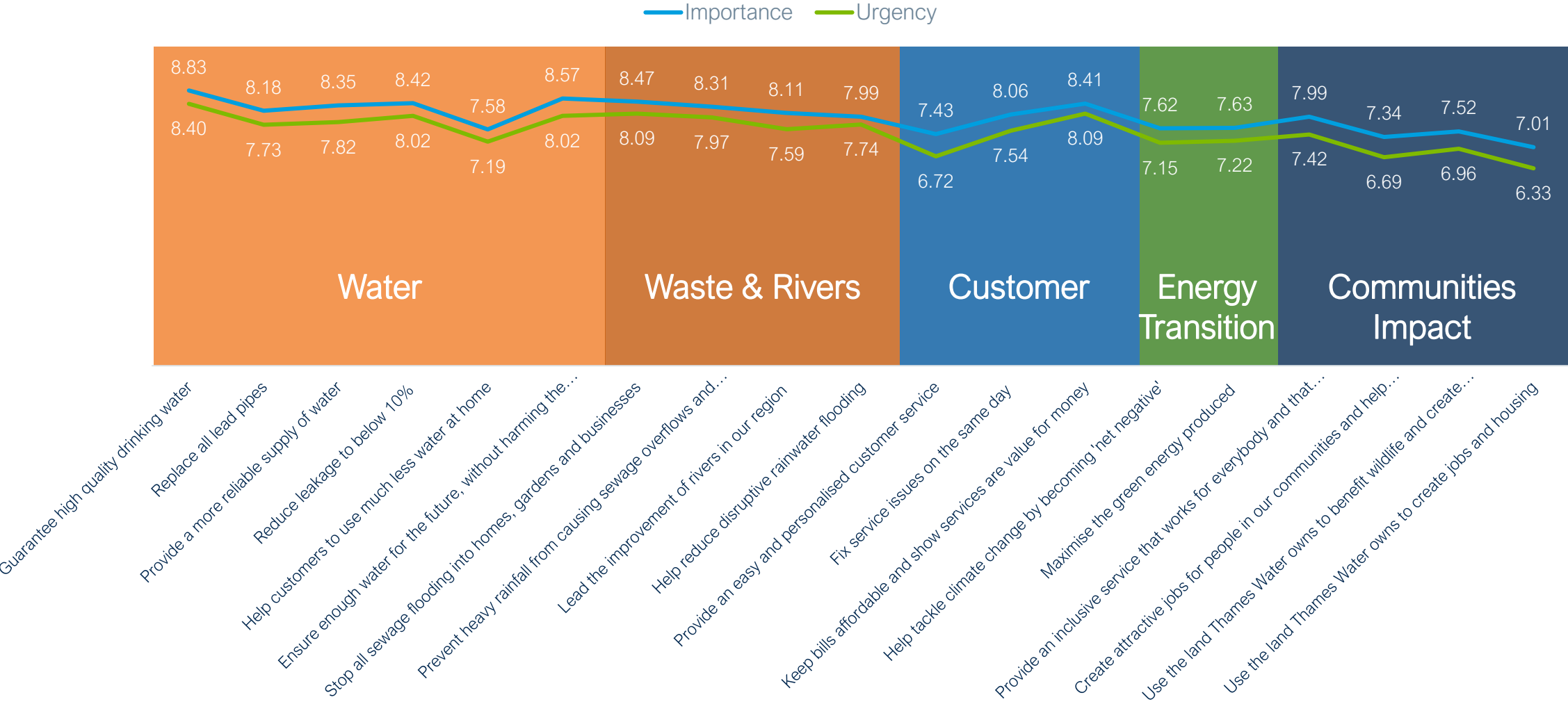
'Water' then 'Waste & Rivers' are both broadly of highest priority in both importance and urgency for improvement

- Looking at importance and urgency for improvement for each goal, it is clear that all of the proposed goals are deemed both important and relatively urgent to improve by customers
 - All goals fall within the range 7.0 to 9.0 in terms of importance (out of 10 overall)
 - All goals fall within the range 6.0 to 8.5 in terms of urgency for improvement(out of 10 overall)
- There is a clear pattern where 'Water' then 'Waste & Rivers' goal clusters tend to be more highly prioritised than others, with the exception of 'Keep bills affordable' and 'Fix service issues same day' (both 'Customer') which are also highly prioritised
- It is important to note that these are relative differences only; all of the Vision goals are deemed important at 7.0 and above



Each of the goals are largely correlated in terms of their relative importance and urgency

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Total - 711)



For all goals and categories, urgency for improvement scores are *lower* than overall importance

- One potential interpretation of this is that there are no goals that customers consider to be in dire need of improvement (i.e. performance is so poor that regardless of importance, urgency for improvement is disproportionately high)
- Another interpretation is simply that customers want action taken on goals in accordance with the level of importance they place on them
- However, the *size* of the gap between importance and urgency for improvement varies between 0.25 and 0.71 overall across the goals. While this is not a major variation, it tends to follow the overall pattern of importance/urgency, in which ‘*Water*’ and ‘*Waste & Rivers*’ show the smallest gap between importance and urgency for improvement (broadly speaking). ‘*Environment*’ also has smaller gaps. This may suggest:

- Customers simply want Thames Water to focus on core service delivery and ensuring sewage does not impact upon homes and the environment in any way (true ‘hygiene’ factors)
- While many of the as yet not-started projects (e.g. building houses) are deemed important, they are less urgent than ensuring water, waste and environment factors are taken care of

Difference of under 0.5

Difference of over 0.5

Goals	Importance	Urgency	Difference
Help reduce disruptive rainwater flooding	7.99	7.74	0.25
Keep bills affordable and show that services are value for money	8.41	8.09	0.32
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.31	7.97	0.34
Stop all sewage flooding into homes, gardens and businesses	8.47	8.09	0.38
Help customers to use much less water at home	7.58	7.19	0.39
Reduce leakage to below 10%	8.42	8.02	0.40
Maximise the green energy produced for Thames Water and for local communities	7.63	7.22	0.41
Guarantee high quality drinking water	8.83	8.4	0.43
Replace all lead pipes	8.18	7.73	0.45
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.62	7.15	0.47
Lead the improvement of rivers in our region so they become among the healthiest in the UK	8.11	7.59	0.52
Fix service issues on the same day	8.06	7.54	0.52
Provide a more reliable supply of water	8.35	7.82	0.53
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.57	8.02	0.55
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.52	6.96	0.56
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	7.99	7.42	0.57
Create attractive jobs for people in our communities and help develop skills	7.34	6.69	0.65
Use the land Thames Water owns to create jobs and housing	7.01	6.33	0.68
Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service	7.43	6.72	0.71

Generally, customers think the 2050 vision is comprehensive; a minority want more detail to understand the nuances of each goal

Ensure the Strategic Roadmap is comprehensive

Are there any gaps in the Vision 2050 ambitions?

- The vast majority of customers have nothing to add to the Vision in terms of components that are missing. This was consistent from the beginning of the research to the end, both with high level and more detailed descriptions of each goal
- Some acknowledge they don't know the water industry very well, they are at loss to say what else could be done
- As a result, they trust Thames Water has thoroughly considered what is achievable and created the vision based on what is best for customers and society at large
- A minority request more information relating to bill impact, tracking the initiatives and resources required
- Anecdotal ideas emerged from a handful of participants, they fall into three themes:
 1. Working with other organisations to promote and develop products related to reducing water consumption
 2. Opportunities to volunteer/ initiatives to educate people to save water
 3. Greater collaboration with the government/ other businesses to exert influence to crack down on pollution, build houses, enhance communities (details of what this would look like in practice were lacking)
 - *It's important to be clear that for these issues, customers don't see them purely as Thames Water's role – they are pragmatic enough to realise that while benefits can be created for customers outside of core services, it is by no means Thames Water's responsibility alone*



Awareness and attitudes towards Thames Water

Alongside ensuring the core water system functions smoothly, customers want Thames Water to more clearly publicise the other schemes they run

Customers' core needs are ensuring water remains drinkable and constant, alongside good customer service



- Most are clear that Thames Water delivers a reliable and consistent supply of water, but some want to see improvements in their customer service.

Primarily I expect a un-interrupted supply of fresh clean water and the removal of sewage and waste water for an affordable cost.

Male, 45-54, ABC1, White, Vulnerable, Waste Only, Affinity Water

[Their customer service] has been historically poor, not just in my personal experience but from things I have read in the media.

Female, 35-44, C2DE, White, Dual Slough/Wycombe/Aylesbury

Thames Water isn't talked about much outside of when things go wrong, but there's appetite from some to learn more



- Customers feel out the loop on new Thames Water initiatives - they typically only hear negative things through family/friends, documentaries or social media.

Our local Facebook group talks about how hard our water is quite a bit. Other residents have said TW's response was 'unhelpful'.

Female, 35-44, ABC1, White, Dual London

I only talk about Thames Water when something goes wrong [...] I would imagine the company has environmental interests but I don't get to hear about these.

Male, 55-64, ABC1, BAME, Dual London

Outside of core maintenance improvements, customers would like to see green energy initiatives, assured affordable water and improved comms



- Clearer comms on Thames Water's role and schemes, investment into green energy and supporting customers to lower bills were common responses.

I would like to see Thames Water introduce water smart meters to show you if you left taps on and give you a warning so you don't waste water which is better for the environment

Male, 18-24, ABC1, White, Vulnerable, Waste Only, Affinity Water

I think I would like to hear more about what they are doing in terms of sustainability and water use

Male, 35-44, C2DE, BAME, Dual London

Context: Customers were provided an overview of the water cycle along with a map showcasing the remit of Thames Water

- Customers were provided with a map of Thames Water's remit, showing where they operated.
- Customers were also shown a simplified version of the water cycle, highlighting how water is treated to clean it, then delivered through customer homes before the wastewater is taken away, treated and returned to nature.
- Following this, customers were asked the following questions:
 - *What is your overall impression of Thames Water having read this?*
 - *Did this tell you anything new or interesting or were you already aware of all of this?*
 - *Do you have any questions or thoughts about Thames Water's activities as a result?*

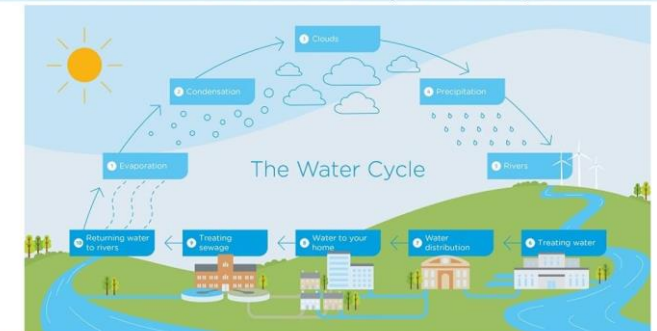
Thames Water is the UK's largest water and wastewater services provider



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

Thames Water and the water cycle

Thames Water interacts with the water cycle, taking water from rivers and natural underground stores and turning it into high quality drinking water. It then delivers the drinking water through a water pipe network to homes and businesses. Once the water has been used (what goes down sinks and toilets) it is collected in the sewer network, ending up at sewage treatment works where the water is treated so it can be safely returned to rivers again.



Customers were interested to learn that Thames Water was the largest water and wastewater provider, and were keen to know more about how water is treated

Thames Water's area of operation

- 'Informed fresh' customers were surprised at the scale of operations for Thames Water, especially how it is the largest water and wastewater provider.
- Similarly, some customers weren't aware of their operations outside of London, expecting them to only function within the capital.

Any questions?

- Some customers were curious to understand how Thames Water handles such large amounts of sewage, alongside the fact that some customers only have wastewater services.

The main thing that surprised me about the information shown is quite how big the catchment area for Thames Water services is. I always thought of them as more of a London based company.

Male, 25-34, C2DE, BAME, Waste Only Affinity Water

I would like to know how Thames Water is able to treat almost 5 billion litres of sewage a day? How is the sewage treated? Does it affect the environment?

Female, 18-24, ABC1, BAME, Future customer, Dual

The Water Cycle

- Although many customers were already aware of the 'natural' water cycle, some appreciated the refresher with others keen to learn more about the 'treatment' section of the cycle.
 - Some referenced the environment, realising the natural balance this cycle relies on.

Any questions?

- Similarly, some customers were keen to find out more about how the treatment process functions.

I hadn't really thought about the water cycle; the image really hammers home how important it is to balance environmental factors with business and use requirements.

Female, 35-44, ABC1, White, Dual London

I knew about steps 1-5 of the water cycle but have less understanding of the process through which water goes through during steps 6-10. Does Thames Water organise tours of its treatment plants to increase understanding and awareness?

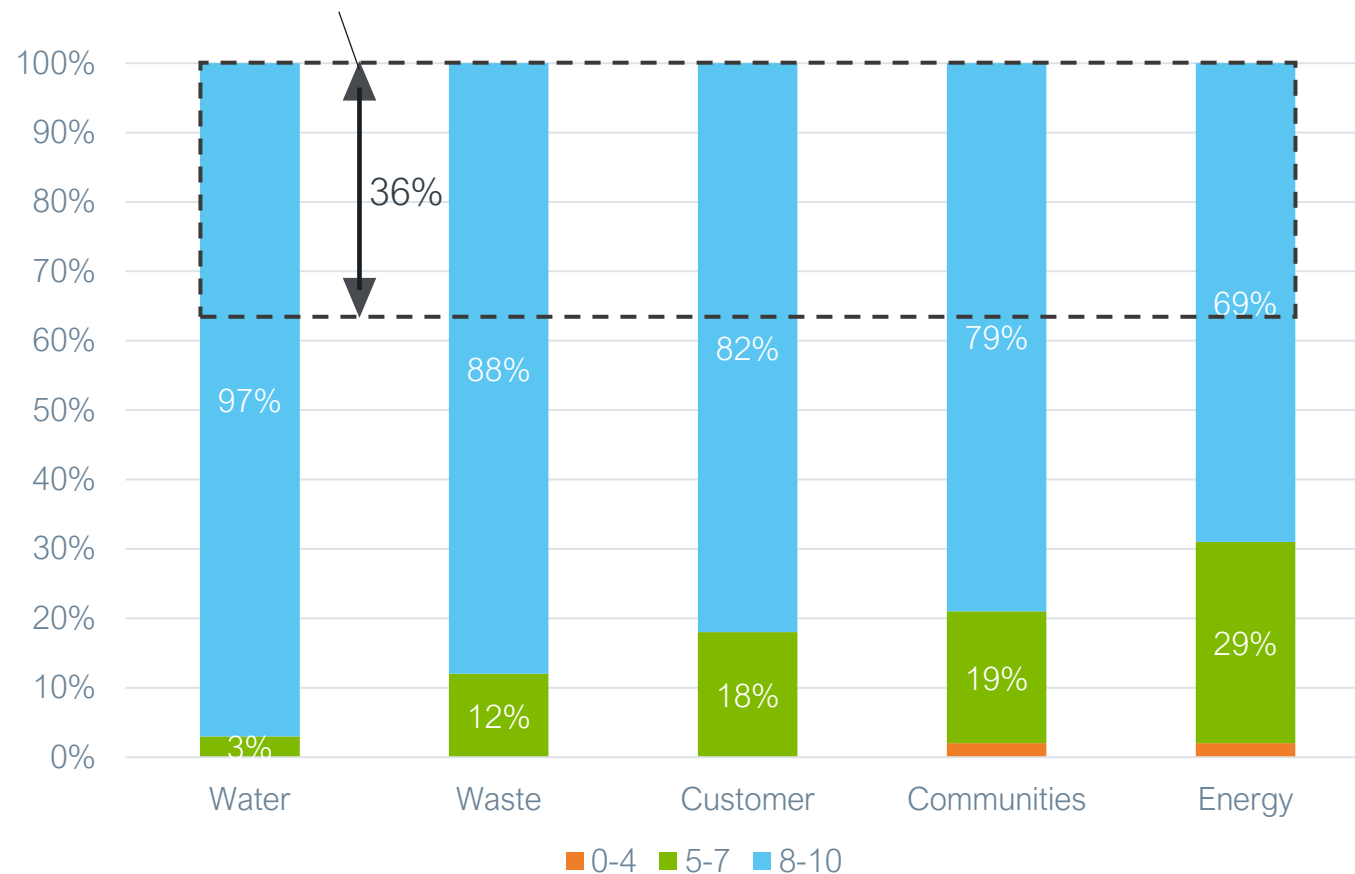
Male, 55-64, ABC1, BAME, Dual London



Qualitative community findings

Although customers largely felt all these areas were important, the 'core' areas of Thames Water remit is where they place the most importance

36% of customers ranked *all 5 areas* as '10', of utmost importance



Key to descriptions

1. **Water:** Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies
2. **Waste and rivers:** Prevent all sewer flooding and wastewater pollution (when untreated wastewater spills into properties and rivers) and lead the effort to restore the quality of rivers and streams
3. **Customers:** Deliver great customer service and value for money
4. **Energy:** Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in) and maximise the green energy produced for ourselves and for local communities
5. **Impact on communities:** Thames Water is a force for good in communities by eliminating water poverty (so all customers can afford to pay water bills), providing jobs and skills and developing the land around its buildings and works responsibly

"Please tell us how important each of these is to you, on a scale of 0 to 10, where 0 is not at all important and 10 is very important"

Base: 124

What do customers expect in each of these areas?

Water

- Reduce water leakage
- Ensure water quality remains high

Waste & Rivers

- Prioritise sewer maintenance
- Reduce river spills and provide reassurances on this

Customers

- Greater transparency on service issues
 - E.g. providing service issue maps to help customers identify if they'll be affected
- Supporting customers to reduce water usage (e.g. providing water meters)
- More online/social media support and communication on schemes and innovations

Energy

- Take steps to tackle climate change
 - Electrify fleet/eco fuels
 - Reduce water waste and support customers in doing so as well
 - Net negative carbon practices
- 'Future-proofing' of business through green technology

Communities Impact

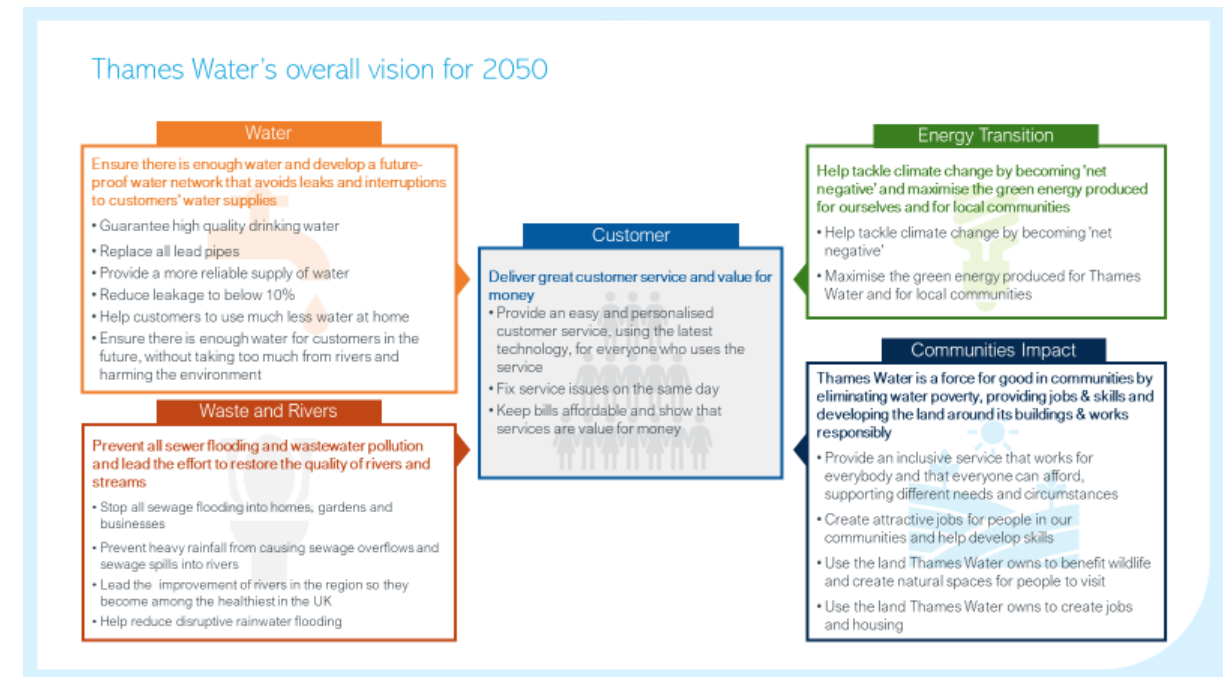
- Affordability of bills so everyone can access clean water
 - Supporting poorer customers to reduce water poverty
- Developing local jobs and skills that are well-paid
- Support customers in saving water and money through technology/advice

Yes these points are very important to ensure Thames Water runs smoothly going into the future and that us as customers continue to have high quality water coming into our homes. And there are less chances of hazards occurring within the systems. And of course the environment is very important so continue to be climate friendly and environment friendly

Male, 18-24, C2DE, BAME, Vulnerable, Waste Only, Future customer

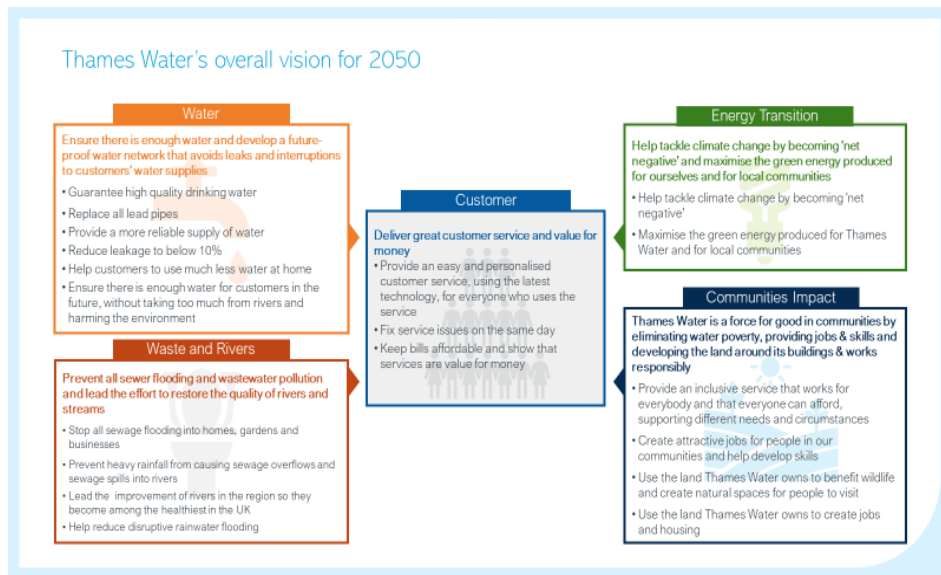
Context: Customers were provided an overview of the 2050 vision

- Customers were provided with an overview of the 2050 vision, and were asked the following set of questions:
 - *What are your initial reactions to what you have just read?*
 - *Is this plan what you would expect of a business like Thames Water? Or would you expect them to be doing something different?*
 - *Is there anything that shouldn't be there?*
 - *Looking at the timescale of 2050 to achieve these ambitions, do you think this ok, not fast enough or too fast, why?*
 - *Do you think some of the initiatives are more important than others? Which ones? Talk us through your thinking here.*
 - *Under each of the five headings in turn are there any goals that you think might be missing?*
 - *And is there anything else that you think Thames Water should be doing that is not covered anywhere here?*
 - *If you think about your local community or society as a whole, do you think these ambitions meet their needs – are they different to your needs, if so how?*

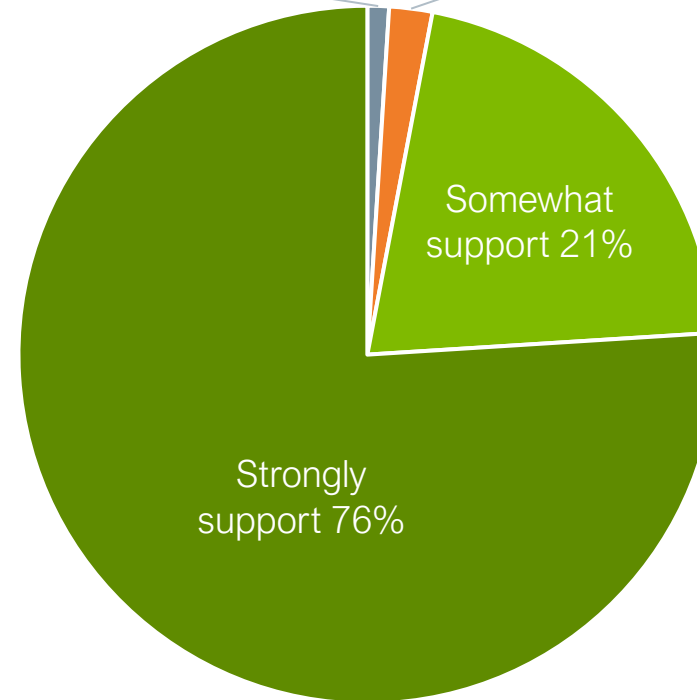


Would you support or oppose Thames Water's Vision for 2050 overall?

Overall support for Vision 2050 is strong



Strongly oppose 1% Somewhat oppose 2%



Informed panel customers (those that have undertaken typically more than one detailed deep dive project in the past few months) tend to be more supportive (81%) on this question than informed fresh customers (71%). This is not however statistically significant.

“After learning about Thames Water's Vision for 2050, would you support or oppose their plan overall?”

Base 117

Customers are largely positive of Vision 2050, and feel that the goals were suitably ambitious, important and align with their expectations

Initial reactions

- Most customers were impressed at the 'ambitious' scale of change promised but some questioned whether this was achievable within the timeframe.
- The holistic view was appreciated by many, who felt this covered all the key areas they'd expect in a clear layout.
- Some felt there could be more around climate change/green energy however.

This is a massive undertaking for any company and with the large area covered by Thames Water it is a logistical nightmare!!!

Male, 65+, C2DE, White, Waste Only, Affinity Water

They have stated what they intend to do, but how? I get its a brief doc, but I would be more interested in knowing how they plan on carrying out these actions.

Female, 25-34, ABC1, Business, 0-9 employees, Water reliant

On the timescale

- Although some customers felt the timescale was overall realistic given the scale of change, many felt it was far too slow.

Which goals are more important?

- Customers felt all goals were important, especially initiatives that ensured core functions, like water quality and customer service.
 - For younger audiences, energy transition plans were given increased emphasis.

Does this meet the needs of their community?

- Generally, customers feel this meets the needs of society and their community, with some suggesting that lower income communities will need more support in the relevant areas of the vision.

I think this is a feasible timescale, although there could be room to make some of the suggestions happen sooner. 2050 may not seem very relevant to older demographics (if this is likely to be outside of their lifetime). May be better broken down decade by decade.

Female, 18-24, ABC1, White, Dual, London

Energy transition amidst the growing concern surrounding climate change - big companies should be seen to be putting this at the forefront of their efforts.

Female, 18-24, ABC1, White, Dual, London

Evaluating individual goals of Vision 2050

Thames Water's overall vision for 2050

Water

Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

- Guarantee high quality drinking water
- Replace all lead pipes
- Provide a more reliable supply of water
- Reduce leakage to below 10%
- Help customers to use much less water at home
- Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment

Waste and Rivers

Prevent all sewer flooding and wastewater pollution and lead the effort to restore the quality of rivers and streams

- Stop all sewage flooding into homes, gardens and businesses
- Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers
- Lead the improvement of rivers in the region so they become among the healthiest in the UK
- Help reduce disruptive rainwater flooding

Customer

Deliver great customer service and value for money

- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Fix service issues on the same day
- Keep bills affordable and show that services are value for money

Energy Transition

Help tackle climate change by becoming 'net negative' and maximise the green energy produced for ourselves and for local communities

- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities

Communities Impact

Thames Water is a force for good in communities by eliminating water poverty, providing jobs & skills and developing the land around its buildings & works responsibly

- Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit
- Use the land Thames Water owns to create jobs and housing



Customer evaluation of goals of Vision 2050

- For the next stage of discussions, customers were presented with information slides detailing the goal, current performance and activities related to meeting the goal. The 19 goals were shown in a different order for each participant.
- Customers were asked to evaluate and comment on each goal as follows:
 - Is this an important issue to you personally? Why/why not?
 - How do you feel about how Thames Water is currently performing on this goal?
 - How do you feel about the goal of what Thames Water wants to achieve by 2050? Please focus on the 2050 goal itself and whether you would like to see this, rather than what it would take to achieve it
 - How do you feel about how Thames Water plans to address this issue? Is this something you think they should be getting involved in?
 - How does the timescale for Thames Water to achieve this goal by 2050 feel to you? *
 - About right
 - Too fast
 - Too slow

- Considering the issue, current situation and 2050 goal, would you support or oppose this 2050 goal? *
 - I strongly support this goal
 - I somewhat support this goal
 - I somewhat oppose this goal
 - I strongly oppose this goal

**Note: for the these 'closed' questions, the total responding (shown on the following pages) doesn't always add to the 122 that participated overall, due to some not answering the question properly*

Guarantee high quality drinking water

What is this about?

- There are rare instances when drinking water does not meet the strict safety and quality standards expected.

Where are Thames Water now

- Last year there were 5 instances of unsafe water quality across the Thames Water region which meant the water supply was turned off temporarily in local areas.

How do Thames Water compare to other water companies?

- Thames Water's water quality levels are close to the average compared with other water companies in the country.

Where do Thames Water want to be by 2050

- Zero instances of unsafe water quality.

This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- Improve the water treatment process using new technology as it is developed.
- Improve the quality of water sources (rivers and underground).
- Keeping up with new safety standards that may develop.
- Keeping up with potential new water contaminants.

Guarantee high quality drinking water

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How Thames Water can improve by 2050

- Improve the water treatment process using new technology as it is developed.
- Improve the quality of water sources (rivers and underground).
- Keeping up with new safety standards that may develop.
- Keeping up with potential new water contaminants.

Clean drinking water is paramount for almost all customers; there is no compromise to be made

Summary overview:

For nearly all customers, the need for high quality drinking water is a given, the ultimate 'hygiene' factor. How customers express this varies; some simply say they expect it as a given, others go further saying that it is essential for a functioning society, free of disease. The very small minority that appear less concerned generally drink bottled water, and there are those that are suspicious of tap water in general.

Low importance

Moderate importance

High importance

What's important/unimportant?

- Clean water is something that most feel should simply not ever be in any doubt.
- Some customers highlight that it is critical for their (and others' health and wellbeing).
- Though not everybody drinks tap water, so this is less of a concern for a very small minority.

How is Thames Water currently performing?

- Perceptions of current performance varies:
 - Some think performance is excellent
 - Some think performance is poor (*any* issues are a failing)
 - Some think it is acceptable but further progress would be welcomed

In their own words

It is very important that drinking water is safe for consumption. I think this is the bare minimum I would expect being a Thames Water customer.

Male, 25-34, ABC1, BAME, Dual, London

As a general public health rule, the cleanest practicable drinking water is absolutely essential.

Male, 55-54, C2DE, White, Vulnerable, South East Water

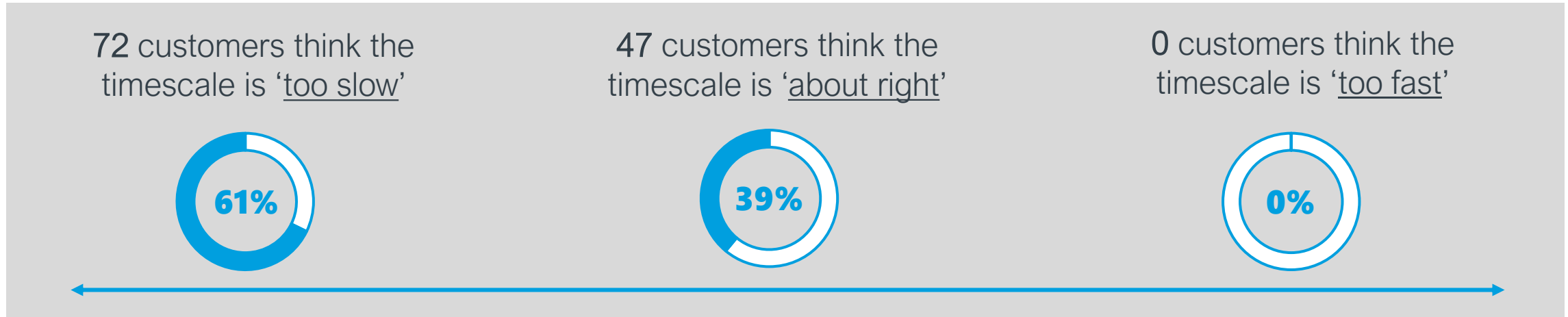
I mean to me personally it's not very important as there is a lot of stigma about tap water not being drinking water..

Female, 25-34, C2DE, BAME, Dual, London

Five instances is low, but zero instances should be standard.

Female, 25-34, ABC1, BAME, Dual, London

The majority of customers feel the timeline to meet this goal is too slow; emphasising the importance of clean drinking water



What do customers think about the goal overall?

- The goal itself is largely well received, with zero instances of poor water quality admirable.
- A small number acknowledge they don't understand the technical details of the challenges involved, and many feel that 2050 lacks ambition for such an important element of service.

What do customers think of Thames Water's plan?

- The plan itself is generally accepted, many customers are positive about the use of technology and forward thinking; some suggest working with other organisations on this.
- Many trust that Thames Water will take the right approach, though a minority feel the plans lack detail.

In their own words

You'd hope it would be earlier than 2050 but again, I don't know the processes and how difficult this could be.

Female, 25-34, ABC1, 0-9 employees, Water reliant, Business customer

I think the goal itself is absolutely the right goal, but 2050 is 28 years away.

Female, 25-34, ABC1, White, Affinity Water

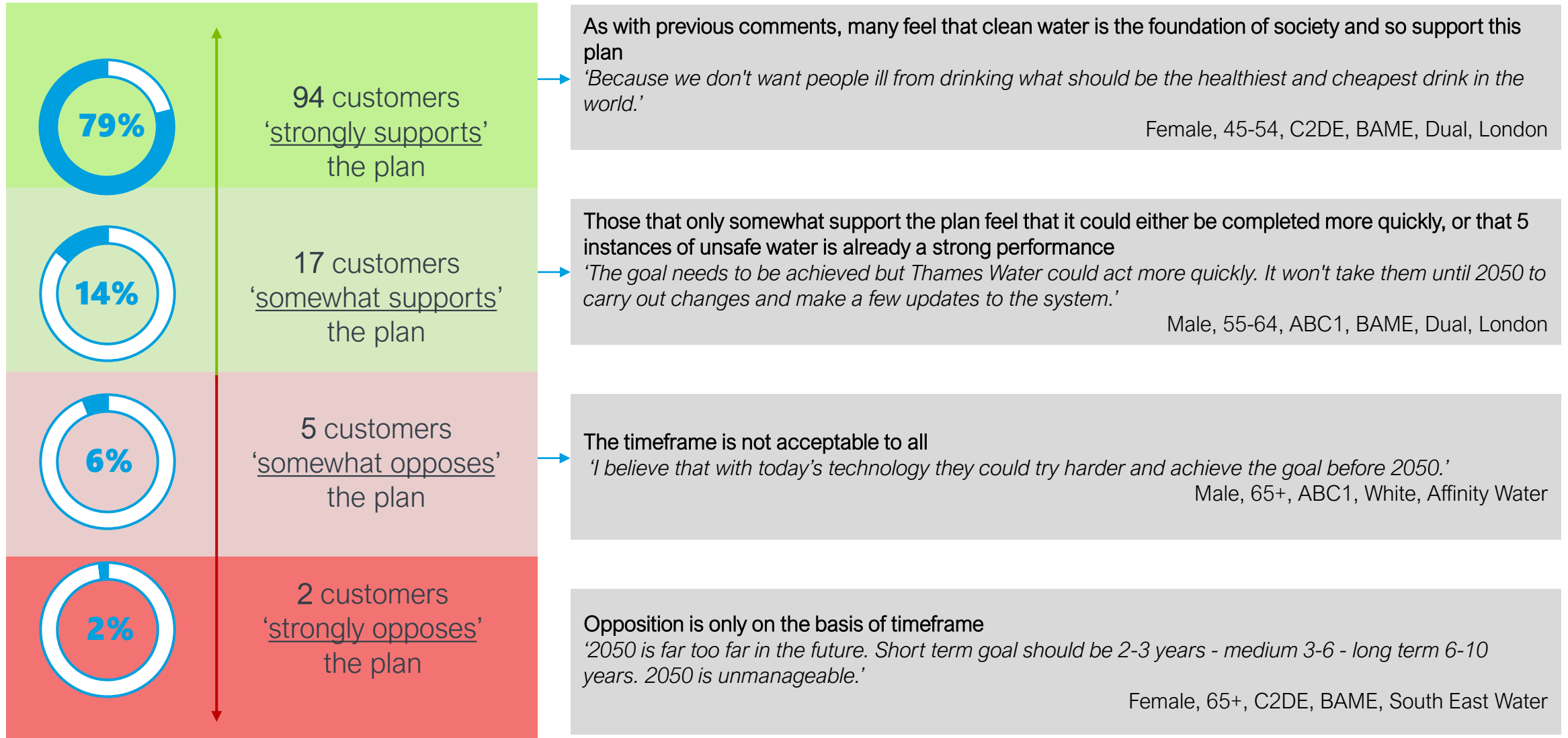
I don't feel that their plans are clear enough to understand how they plan on doing this.

Female, 25-34, ABC1, 0-9 Employees, Water reliant, Business customer

I think perhaps they could work with other water companies and share ideas so everyone can benefit.

Male, 65+, ABC1, White, Affinity Water

There is no direct opposition to the plans to improve water quality; the only pushback is that it should be undertaken more quickly



Replace all lead pipes

Replace all lead pipes

What is this about?

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

Where are Thames Water now

- There are **over a million** lead pipes in Thames Water's network, and around the same amount within customer properties.

How do Thames Water compare to other water companies?

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

Where do Thames Water want to be by 2050

- **No** lead pipes.

This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- Thames Water has been replacing around 10,000 lead pipes per year, but this will increase to almost 50,000 lead pipes replaced per year.
- Thames Water will also help schools to replace lead pipes into drinking water fountains, and help customers replace lead pipes on their properties.

Replacement of lead pipes is a new issue for many, and one that provokes concern

Summary overview:

Many customers are not aware of the issue of lead being harmful to health and are surprised that it is to be found in the water network. Concerns about the impact on health, and in particular the potential danger to the young, are very apparent. There is a clear appetite for Thames Water to address this as a priority.



Low importance

Moderate importance

High importance

What's important/unimportant?

- The main concerns are for public health. A small number are less concerned due to their age or knowing they do not have lead pipes.
- But there is an overriding concern for safety, particularly in the case of young children.

How is Thames Water currently performing?

- Views are mixed. Some are happy that pipes are already being replaced while some believe that given the extent of the issue, greater importance and urgency should be placed upon this initiative.

In their own words

It is an important health and safety issue, I am particularly concerned to hear that there are lead pipes going into water fountains in schools when children are at most risk. This should be prioritised straight away. .

Female, 55-64, ABC1, BAME, Dual, London

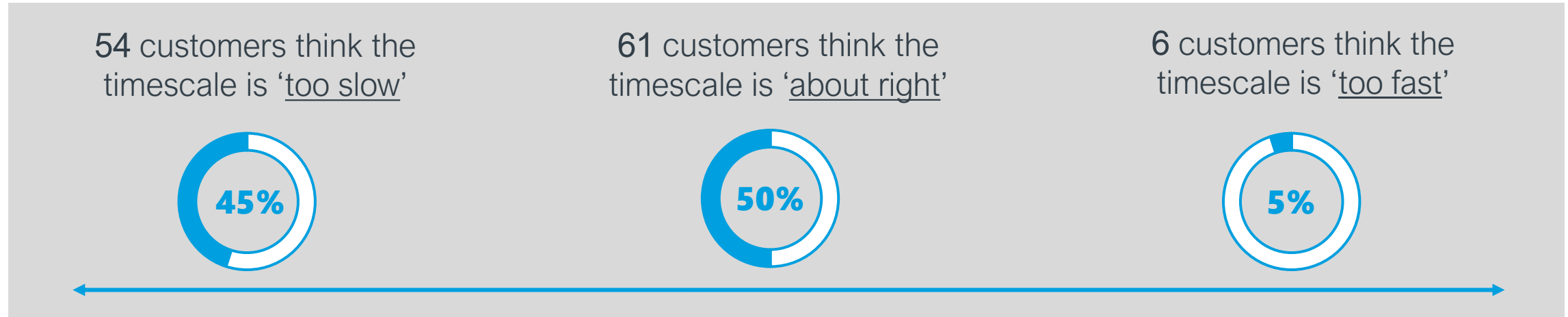
I do think this is quite an important issue as it's in everybody's interests for tap water to be clean and safe to drink. I would also expect this to be one of the core business reasons for Thames Water wanting to remove all lead piping.

Male, 45-54, ABC1, White, Sutton & East Surrey Water

I appreciate that this is a huge scale problem but I think this needs to be addressed more thoroughly especially to replace the pipes in schools and drinking fountains. I would like to know when this improvement from 10,000 to 50,000 will occur.

Female, 35-54, ABC1, BAME, Dual, London

For most, the timescale Thames Water suggests for replacing lead pipes is 'about right', although a sizeable minority would like to see a faster uptake on this scheme



What do customers think about the goal overall?

- The goal of replacing all lead pipes is what customers believe is wholly necessary.
- Some understand that this will take time, others feel this should be accelerated.

What do customers think of Thames Water's plan?

- A number of customers see this as a major undertaking, and some question why local authorities and housebuilders do not also have a role to play.
- Overall, customers are behind the plan, regardless of timings.

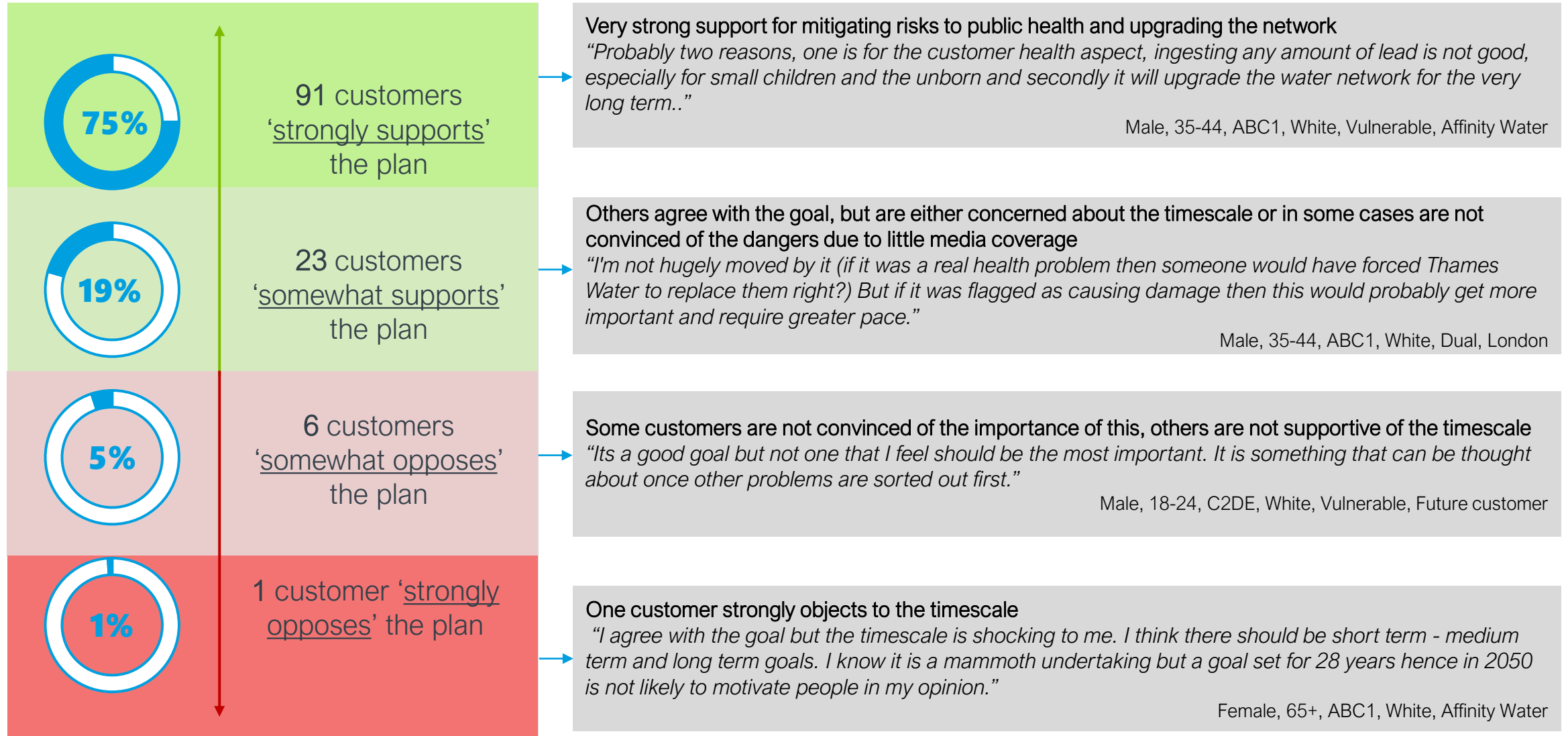
In their own words

It seems rather unambitious. If they're replacing 10,000 pipes a year now then what was the replacement rate 30 years ago when TW was formed?.
Male, 55-64, ABC1, White, Sutton & East Surrey Water

The goal is a great one. increasing the replacing of pipes to 50,000 annually will go a long way and achieving 0 lead pipes by 2050. I think creating water fountains in school is also a great idea.
Female, 45-54, ABC1, BAME, Dual, London

10,000 at the moment and going up to 50,000, who pays the added costs, huge increase in workforce to achieve this..
Male, 45-54. ABC1, BAME, Dual, London

There is very strong support for the goal of replacing all lead pipes



Provide a more reliable supply of water

Provide a more reliable supply of water

What is this about?

- The water network can sometimes experience breakdowns or damage which can cause customers to have periods of low water pressure or no water at all.

Where are Thames Water now

- Interruptions to customers' water supply average 22 minutes per property per year.

How do Thames Water compare to other water companies?

- Water supply interruptions average 10 minutes per property per year across the rest of the country.

Where do Thames Water want to be by 2050

- Interruptions to customers' water supply will average less than 3 minutes per property per year, and there will be no major water interruptions (more than 48 hours).

This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- Improving the condition of the water network to a more stable state, including a quicker rate of replacing water mains and pipes.
- Adding sensors inside water pipes to detect any damage so this can be repaired or replaced before the water supply is impacted.
- Improving how water supplies are connected together so there are back-ups if anything breaks. This includes connections with neighbouring water companies, to share water supplies across the south east.

A more reliable supply of water is important for all, but mediated by the fact that performance is generally accepted to be good

Summary overview:

Customers are clear that a reliable supply of water is important. At the same time, many feel it is lower down the list of priorities for them as they either do not see 22 minutes of outage as especially poor, or they have never experienced such problems themselves. But the principle of reliability is of prime importance.



Low importance

Moderate importance

High importance

What's important/unimportant?

- A number of customers feel that this is an important thing to ensure, but at the same time do not see a huge issue with performance.
- Some simply see it as lower priority than other issues that need to be fixed.

How is Thames Water currently performing?

- Views on this are very mixed; some see current performance as exceptional, through to those that feel it is poor due to direct comparisons with other water companies.

In their own words

This is an important issue to me. Whilst I think it is acceptable, the 22 minute interruption of the service on average for TW customers, as a comparison to other companies, it is a bit disappointing that this is more than 2x as much on average of other companies.

Female, 55-64, ABC1, BAME, Dual, London

I don't see this as important as TW's other initiatives. Even though TW has a higher interruption rate of 22 mins per Year. This isn't major..

Female, 45-54, C2DE, BAME, Dual, London

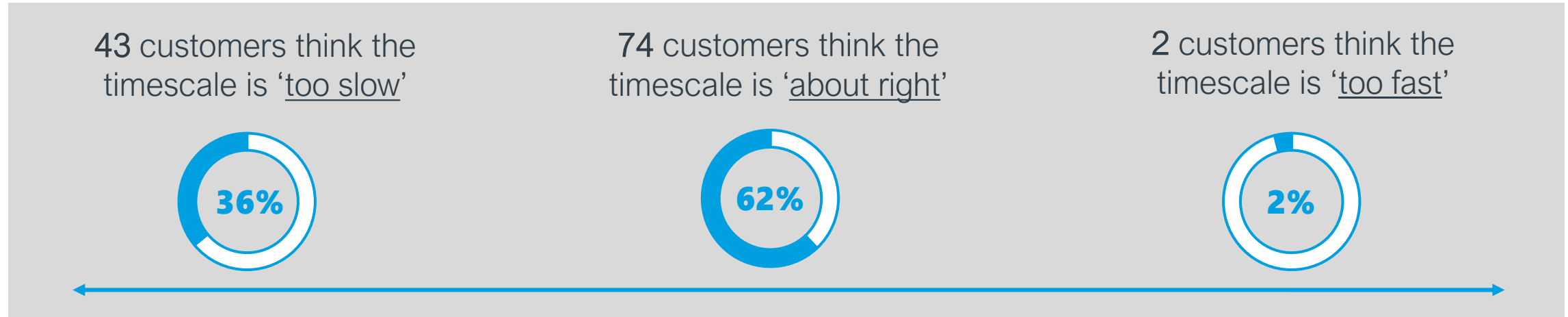
The system is nothing if not super reliable!

Male, 45-54, ABC1, BAME, Affinity Water

Disappointed that they compare poorly to average. If changing water suppliers was an option, I expect people would have...

Female, 25-34, ABC1, White, Dual, Slough/Wycombe/Aylesbury

Views on the urgency for a more reliable water supply are mixed



What do customers think about the goal overall?

- Reactions to the goal are very mixed. Some see it as perfectly reasonable given current performance, while there are those that would like to see progress accelerated.

What do customers think of Thames Water's plan?

- Timescales aside, customers are largely very positive about the plan, particularly the use of technology.

In their own words

I cannot stress to strongly that the 2050 goal is simply not acceptable. The public pays a surprising amount for clean water, and therefore have every right to expect that leaks will be reduced to acceptable proportions much sooner..

Male, 55-64, ABC1, White, South East Water

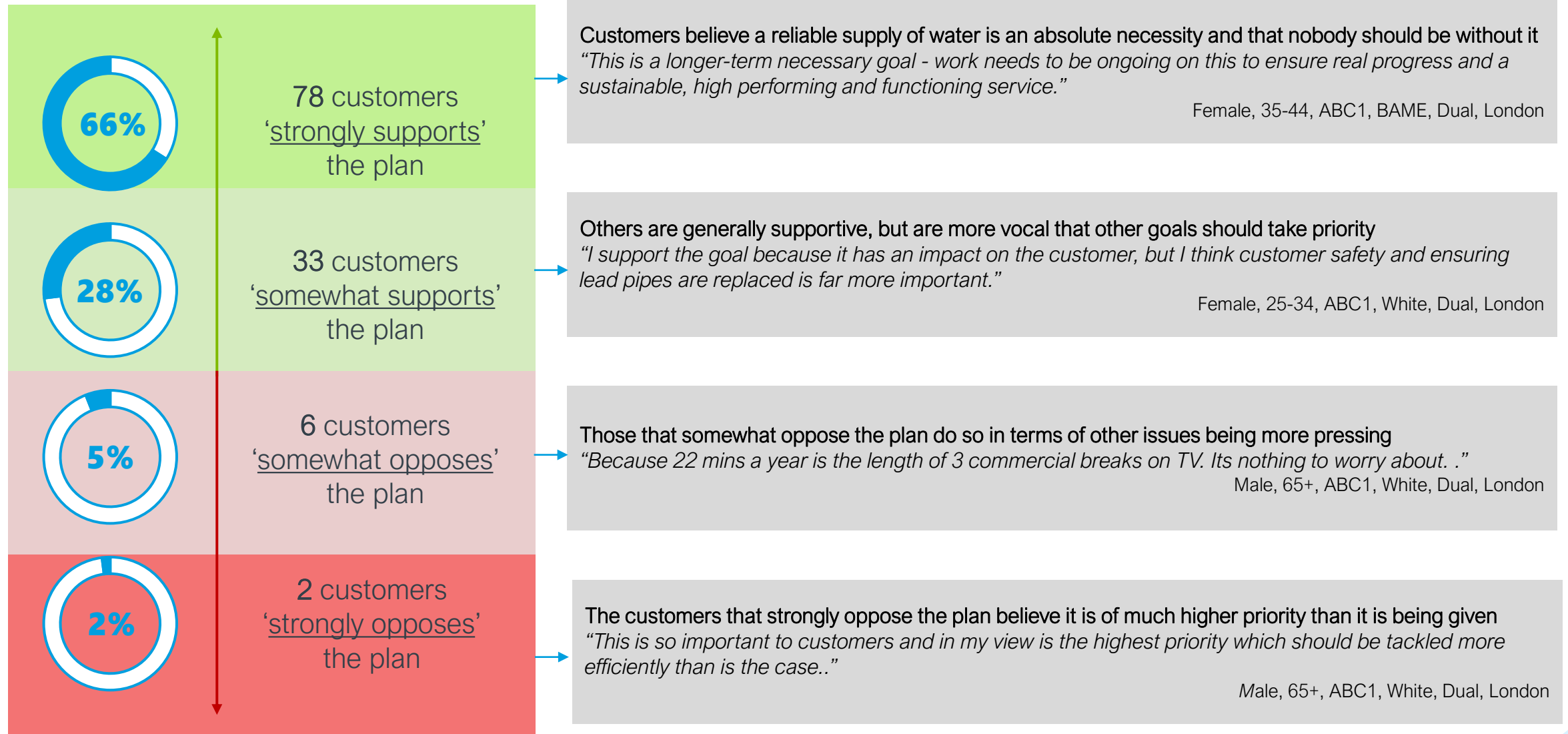
I do think that they should be involved. I think the idea of linking networks of water is a very good idea. I think using technology is a great forward thinking plan.

Female, 35-44, C2DE, White, Sutton & East Surrey Water

Yes I think the plan sounds like a great idea. I think the idea of sensors is interesting.

Female, 25-34, C2DE, White, Affinity Water

Although a number of customers see a more reliable water supply as lower priority than some other initiatives, it receives strong support



Reduce leakage to below 10%

Reduce leakage to below 10%

(the proportion of water that leaks out of pipes on its way to customers)

What is this about?

- So that customers have a sustainable supply of water, and to avoid wasting water, Thames Water needs to reduce the amount of water that leaks out of the network.

Where are Thames Water now

- Almost a quarter (23%) of the drinking water that Thames Water produces is lost before it reaches customers' taps due to leakage.

How do Thames Water compare to other water companies?

- Thames Water has by far the highest level of water leakage compared to all the other water companies in the country. Others have between a quarter and a half of the amount of leakage (per kilometre of pipes) compared to Thames Water.

Where do Thames Water want to be by 2050

- Leakage to be under 10% of water lost.

This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- There will be more smart water meters in properties that can be monitored to detect where leaks occur, and leaks will be detected via satellite – these are two ways Thames Water could use technology to find and repair leaks quicker.
- More old and leak-prone pipes will be replaced in the water network as well as customer-owned pipes.

Reducing leakage is highly important to most; many associate leakage with increased costs. Some also worry about indirect environmental damage caused by requiring more water

Summary overview:

Many feel they are directly impacted by leakage through higher bills which could otherwise be avoided. This is the main driver of why they feel this is important. Some are frustrated that leakage has got to these levels, believing Thames Water has sat on the issue for too long. In contrast, many respondents acknowledged the logistical complexity involved in reducing leakage. Overall, customers view this as an urgent core responsibility to tackle as soon as possible.

Low importance

Moderate importance

High importance

What's important/unimportant?

- There is a strong reaction to the idea of huge quantities of water being wasted.
- Most equate water wasted with money lost, and given the current economic climate, are more sensitive to this.
- Some also believe this will indirectly harm the environment.

How is Thames Water currently performing?

- Many think Thames Water's performance is very poor here as it performs worse than other providers but without context as to why.
- It is important to note, the transparency shown by Thames Water is appreciated by customers, who believe it is committing to being better here.

In their own words

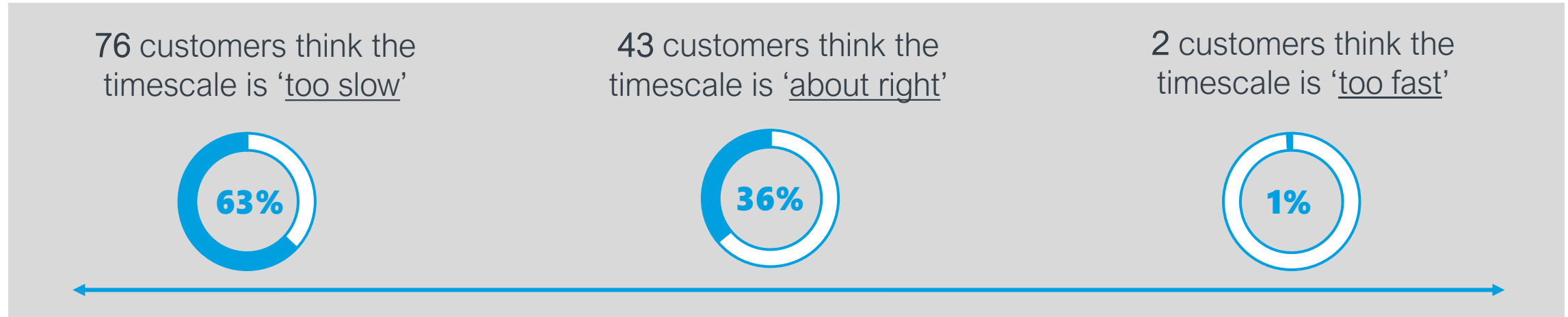
Water leakage is important to me because it affects cost and increases waste. Reducing the leakage will reduce costs and waste.

Female, 45-54, ABC1, BAME, Dual, London,

They are performing pretty poor and I can see this when driving on London roads and seeing that they are digging up the roads because of a water leak. To be fair it's probably not their fault if the water pipes are old and need replacing.

Female, 45- 54, ABC1, 10- 49 employees, Water reliant, Business customer

For most, the timescale for reducing leakage is too slow, some admit they don't know the full context or rationale behind the timings



What do customers think about the goal overall?

- Most customers support the end goal but struggle to understand why it would take 28 years to replace pipes.
- Some said that they would be more accepting of the timeframe if they knew the context behind this but at a glance, if these improvements could be made much faster, Thames Water should prioritise this.

What do customers think of Thames Water's plan?

- Many support Thames Water's plan and believe that the technological means to take action is credible.
- However, while many also support the use of smart meters, they wonder why it will take up to 28 years to have these installed en masse.

In their own words

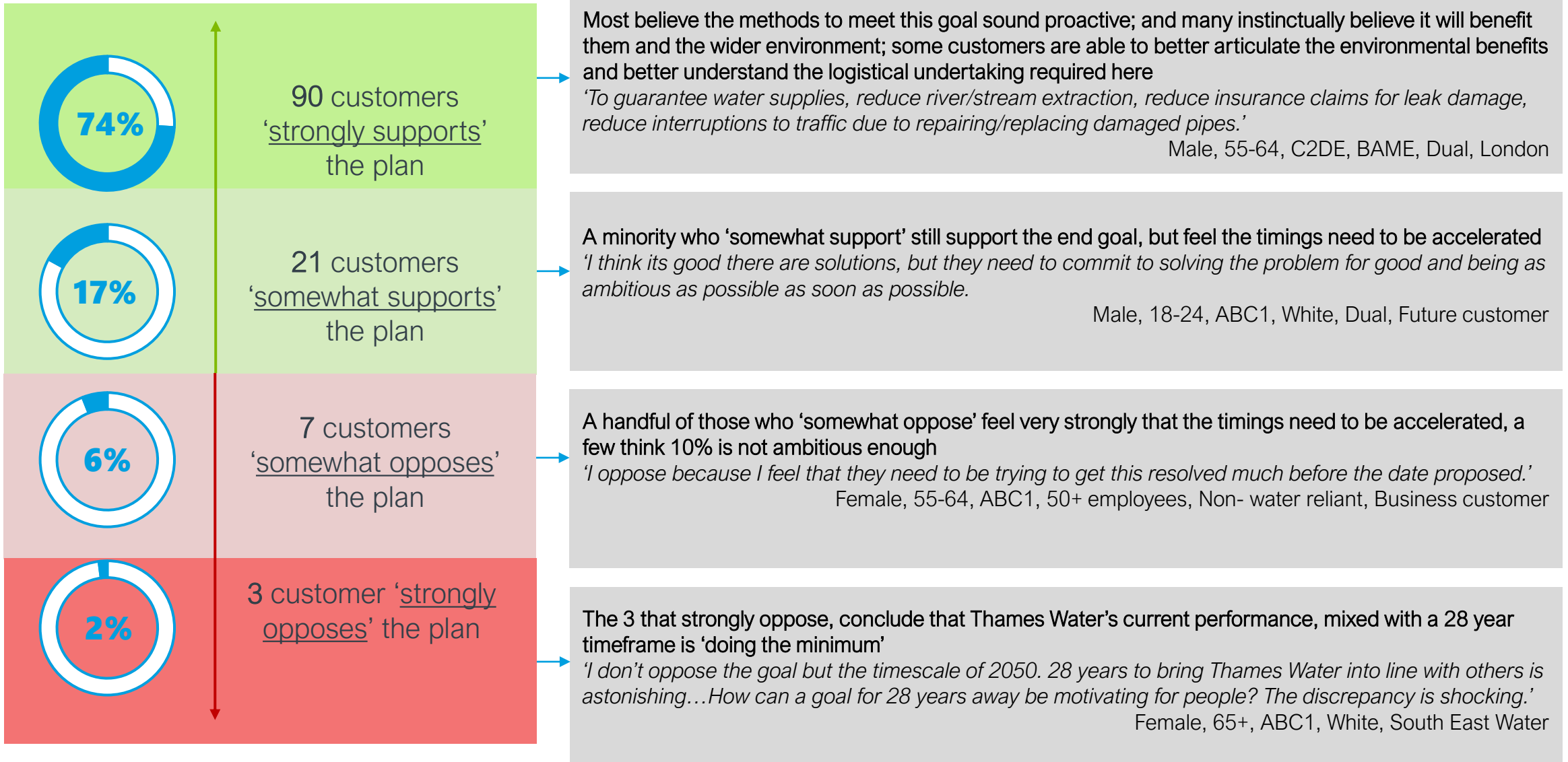
It is way too slow, the first project of using renewable energy to 100% replacing present methods I understand will require huge investments, but no way will it take 28 years to the year 2050 to fix all leaking pipes, This should be achieved by 2030, that is 8 years to replace all leaking pipes and they should be able to get it to 5% not 10%.

Male, 45-54, ABC1, 10- 49 employees, Non- water reliant, Business customer

I'm not sure how old piping is and how sustainable it is, so to refix new piping, I wouldn't say it would be completely fixed by 2050 - even to 10% but it would be a game changer as I can imagine losing 23% isn't great.

Female, 25-34, ABC1, 0-9 employees, Water reliant, Business customer

Reducing leakage to below 10% is strongly supported by most customers; almost all of the opposition is not against the end goal, but the timescale stated



Help customers to use much less water

Help customers to use much less water

What is this about?

- Supporting customers to reduce the amount of water they use, so there will be enough to go round in the future, with a changing climate and growing population.

Where are Thames Water now

- Each person in Thames Water's region uses on average 147 litres of water per day.

How do Thames Water compare to other water companies?

- The UK average daily water use is lower at 142 litres per person, this is even lower in some other countries, like Germany at 121 litres.

Where do Thames Water want to be by 2050

- Average water use per person to be 110 litres per day.

This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- Install smart water meters on all possible properties and use the data from this to inform customers how to save water and how to spot potential leaks.
- Guiding property developers and landlords to use water-efficient appliances.
- Working with manufacturers of washing machines, dishwashers and showers, so that appliances available to consumers are as water efficient as possible.
- New incentives where water costs increase once a certain amount of water is used, or costs reduced if water-efficient devices are used.

Helping customers reduce water use, while broadly supported, receives a muted response as many believe they are not wasteful; a minority believe this will increase costs

Summary overview:

Many customers believe they are not personally wasteful with water. Many believe smart meters will save them some money and help the environment. There is some pushback from a minority (mainly those with less trust in Thames Water) who do not like the idea of having smart devices in their homes on the basis it may cost them more money per year.

Low importance

Moderate importance

High importance

What's important/unimportant?

- Many take the goal on face value and believe it will encourage less water usage, save money and also help the environment.
- However, many believe that reducing leakage and working with appliance manufacturers to reduce water usage is a more important issue to address.
- Some customers attributed slightly more importance here, believing that even a small change en masse, can make a significant difference.

How is Thames Water currently performing?

- Many believe that while Thames Water is performing satisfactorily, the evidence suggests more investment is required in educational activities and partnering with manufacturers to reduce water consumption.
- Freshly recruited participants were a little more critical of Thames Water's performance, as they were less aware of the educational efforts Thames Water is making.

In their own words

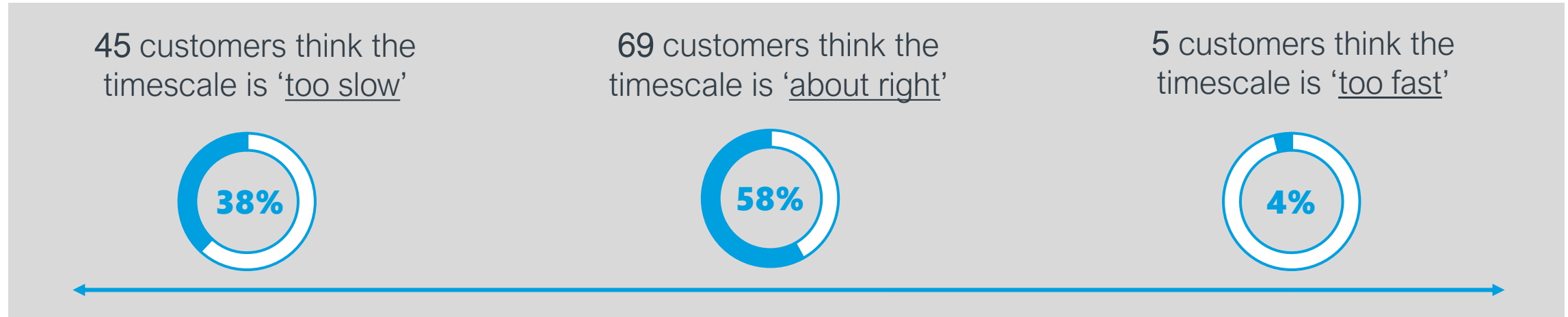
For me personally it's not such an important issue as I am already careful with my usage of water and other utilities. However, I get that working with product manufacturers to make more efficient products will be beneficial to me.

Female, 45-54, ABC1, 10- 49 employees, Water reliant,
Business customer

It is definitely an important issue but one that is more accountable and responsible for people that really want to make those changes for themselves so not entirely Thames Water's responsibilities.

Male, 18-24, C2DE, White, Vulnerable, Future customer

For most, the timescale for helping customers reduce water use is felt to be 'about right', although a sizeable minority would like to see more immediate action



What do customers think about the goal overall?

- The goal is largely supported by customers, and they expect it should save a significant amount of water.
- A sizeable minority wonder if Germany are really 28 years ahead in their approach to reducing water, and why Thames Water can't replicate their methods to crack down on this sooner.

What do customers think of Thames Water's plan?

- There is widespread support for working with manufacturers of water efficient appliances on the basis that it is no effort on part of the customer and will have a big impact.
- A minority don't agree with using smart meters, believing it will cost them more money.

In their own words

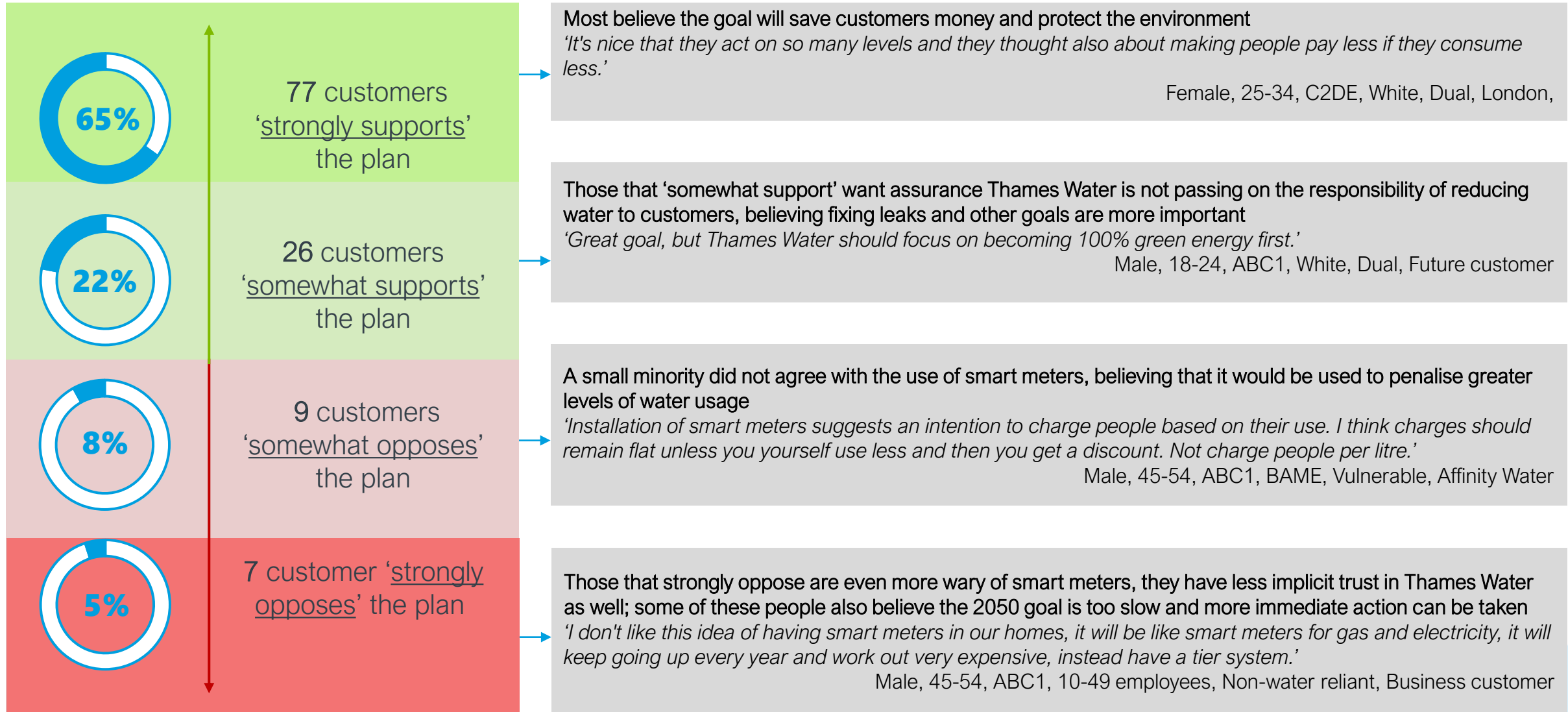
I agree with installing as many water meters as possible. I think most people would save money on a meter, and they can alert you much more quickly if there is a leak which you don't know about (as has happened to me and it cost me hundreds of pounds as I didn't have a meter).

Female, 35-44, C2DE, White, Dual,
Slough/Wycombe/Aylesbury

I'm not sure I agree with increasing prices for the more water you use, as there are many issues why you could be using more water.

Female, 45-54, C2DE, White, Sutton & East Surrey Water

Helping customers to use much less water is strongly supported by most customers, the few that do not support the goal, do so on the belief that smart meters may be financially punitive



Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment

Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment

What is this about?

- We need to have secure supplies of water into the future, with a changing climate and growing population, but the environment should not be damaged in the process.

Where are Thames Water now

- **Very rarely there is not enough water to go round** if an extreme drought happens. There are growing challenges to sourcing water, taking too much from vulnerable rivers and streams (including chalk streams) is already causing damage to wildlife there.

How do Thames Water compare to other water companies?

- Like Thames Water most water companies in the country are able to cope with droughts. All companies are aiming to improve their ability to cope with more extreme droughts in future.

Where do Thames Water want to be by 2050

- **No customers will be without water** due to climate change (extreme droughts). Thames Water will protect vulnerable rivers and streams by stopping taking water from these.

This is from the theme of WATER:
Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies

How Thames Water can improve by 2050

- Developing new water sources such as transferring water from other areas of the country, building a new reservoir and water recycling schemes.
- Stopping taking water from vulnerable rivers and streams (including chalk streams).
- Reducing leakage down to less than 10% by repairing and replacing more pipes.
- Helping customers to reduce their water usage.

Ensuring there is enough water for customers is perceived as a fundamental need that drives much of the importance attributed here; customers also value protecting rivers/waterways

Summary overview:

This goal resonates strongly primarily because of the value customers place on water, both for themselves and society at large. Customers accept the realities of climate change and want to avoid a future of reduced living standards due to less water supply. Customers also greatly value not damaging the environment in the process and so believe this is one of the most important issues raised.

Low importance

Moderate importance

High importance

What's important/unimportant?

- Customers believe that ensuring a clean, safe and plentiful water supply is paramount and is one of Thames Water's most important responsibilities.
- While maintaining a plentiful water supply is very important to customers, many openly declare concern about climate change and are relieved to hear that Thames Water plan to achieve this goal by minimising its impact on the environment.

How is Thames Water currently performing?

- Overall, customers are broadly happy with Thames Water's performance as they have not experienced water shortages.
- A few acknowledge that while this is positive on the surface, they would want assurance that Thames Water are currently going about this in an environmentally sustainable way.

In their own words

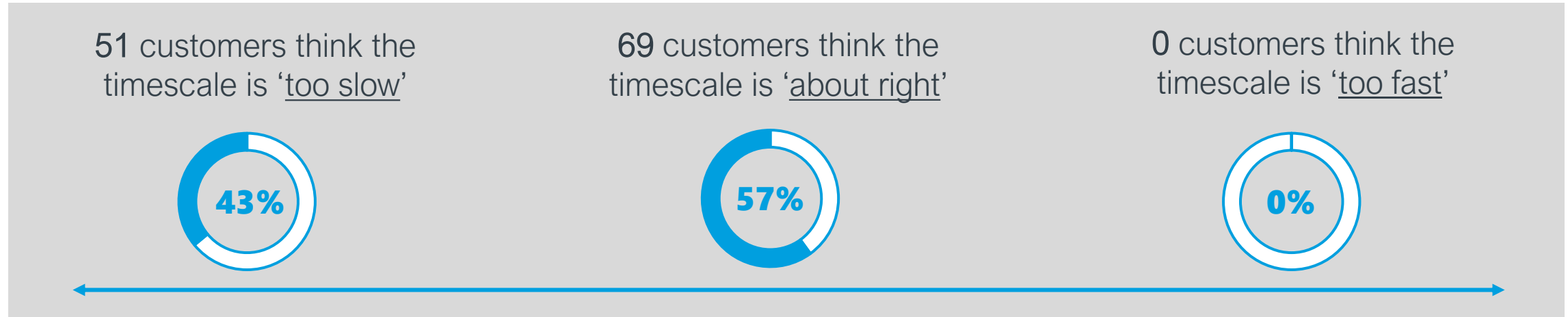
It's important to me that we have enough water to go round - I was a child in the 70s with standpipes, keeping and reusing the waste water from washing up/running taps etc. and having to really save water

Female, 55-65, ABC1, White, Vulnerable,
Slough/Wycombe/Aylesbury

You don't hear of anyone being without water, so I guess they are achieving that. I do not know how much water is currently taken from vulnerable sources, so cannot comment on how well they are achieving that. If the goal is to reduce wastage to less than 10%, then I presume that it is currently higher than that

Male, 45-54, ABC1, White, Vulnerable, Sutton & East Surrey
Water

For most, the timescale for ensuring enough water for the future is 'about right', although a sizeable minority want assurance Thames Water protects waterways in the interim



What do customers think about the goal overall?

- Customers think the overall goal is not only commendable but essential to the future of both customers' wellbeing and the environment.
- A sizeable minority believe that action should be taken more urgently or provide them with assurance that Thames Water will not cause significant damage to waterways during this process of balancing water supply vs. environmental needs.

What do customers think of Thames Water's plan?

- Customers applaud Thames Water's commitment to ensuring that enough water will reach customers in an environmentally sustainable way.

In their own words

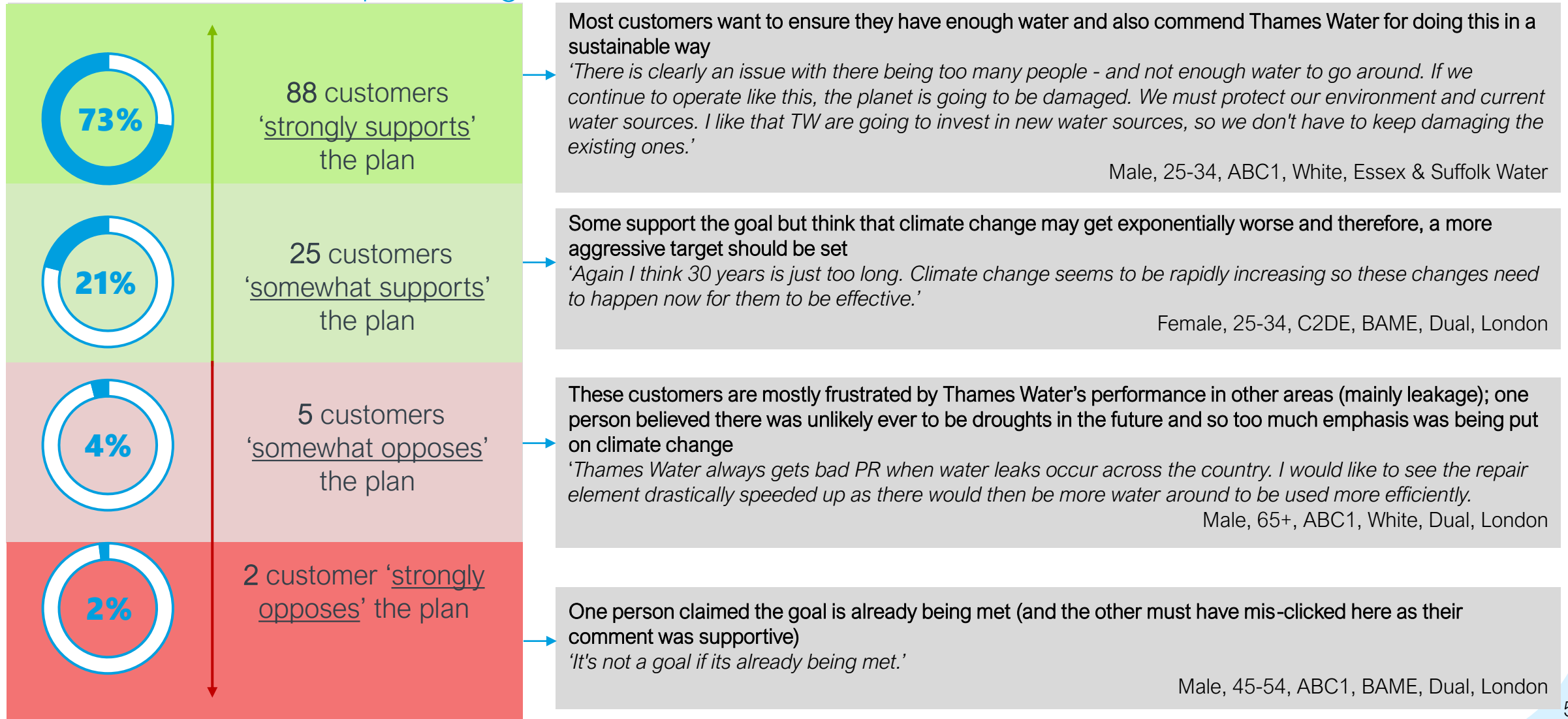
I think that 2050 is too far away and this could be achieved perhaps in the next 10-15 years. That is plenty of time, especially considering the at risk areas of water which could well suffer very much if it takes so long for TW to stop using them as water sources.

Female, 25-34, ABC1, White, Dual, London,

Getting to the goal of ensuring that there's sufficient water is one thing but Thames Water recognise that that has to be done in a sustainable way so it's good to see that recognised.

Male, 45-54, ABC1, White, Dual, London

Ensuring there is enough water for customers in the future without taking too much from rivers and harming the environment is strongly supported by most because it 'future proofs' living standards without compromising the environment



Stop all sewage flooding into homes gardens and businesses

Stop all sewage flooding into homes, gardens and businesses

What is this about?

- Sewer flooding in homes, gardens and businesses can happen when the sewer system becomes full due to blockages or too much rain water.

Where are Thames Water now

- About 150 customers per year experience sewer flooding on their properties.

How do Thames Water compare to other water companies?

- Thames Water has one of the worst rates of property sewer flooding in the country. It has 2.3 sewer floods for every 10,000 properties compared to the best company having 1.3 and the worst having 4.5 for every 10,000 properties.

Where do Thames Water want to be by 2050

- No sewer floods on customer properties.

This is from the theme of WASTE AND RIVERS: *Prevent all sewer flooding and wastewater pollution and lead the effort to restore the quality of rivers and streams*

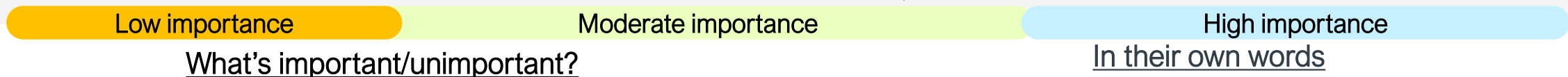
How Thames Water can improve by 2050

- Problems such as blockages will be identified by new sewer monitors, so they can be proactively fixed before sewer floods occur.
- Improving customers' knowledge and behaviour of what shouldn't be put down toilets and sinks.
- Working with manufacturers of products like wet wipes, to make them flushable.
- More capacity in sewers will be made by diverting or absorbing rainwater in gardens and the earth, instead of entering drains.
- Building bigger sewer pipes near the properties at highest risk of sewer flooding.

Stopping all sewage flooding into buildings and gardens is seen as a basic hygiene factor by most, although it doesn't personally impact them now, and is unlikely to in the future

Summary overview:

Customers believe protecting homes, gardens and businesses from sewage flooding is an essential core function of Thames Water. They admit their perceived importance of the issue would increase hugely if it were to personally impact them, but assume this is very unlikely given the numbers provided. Many do not think about the growing pressures on the network in the future and so believe that while the goal is important, other initiatives relating to fixing leaks, and protecting the environment should be prioritised.



Low importance

Moderate importance

High importance

What's important/unimportant?

In their own words

- This goal is seen as an important hygiene factor for Thames Water to pursue.
- However, as many see the amount of homes affected as small in comparison with the wider network, they want assurance pursuing this goal won't impact other 2050 goals.

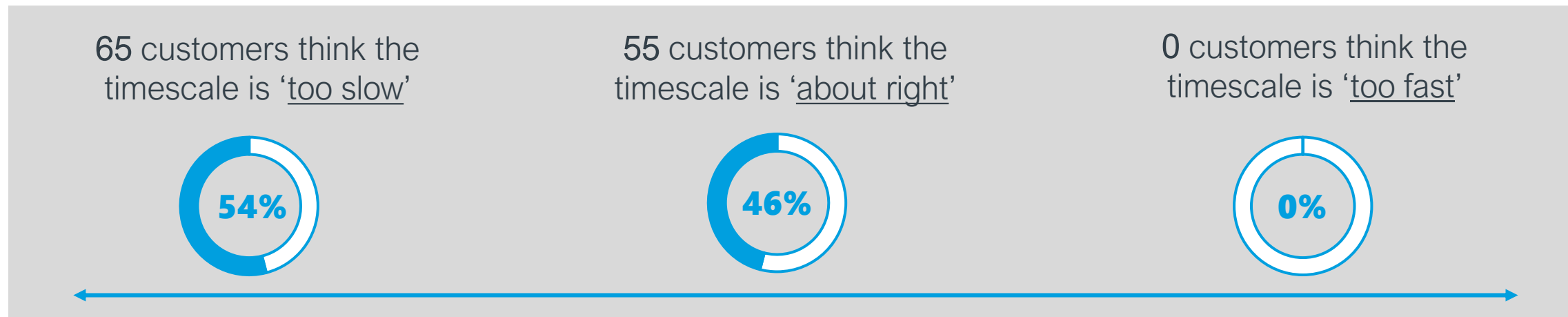
How is Thames Water currently performing?

- Many customers believe Thames Water are performing well due to the low number of homes impacted, coupled with plans to eradicate this completely via technological innovations.
- A small minority feel Thames Water could do better on the basis that compared with other water companies, they are below average on this measure; they want to know the context behind this.

This is not something I have experienced, however, it is important that toxic substances such as sewage do not come near a customer's home/business.
 Male, 25-34, ABC1, White, Dual, London

I don't think Thames Water is doing too bad, considering the amount of customers they have the number is reasonable. I have personally never experienced it, so I can only imagine what it would be like.
 Female, 25-34, ABC1, White, Dual, London

Many believe that instilling behavioural change in customers to help stop sewage flooding can be achieved before 2050; others feel timings are proportion to the scale of the issue



What do customers think about the goal overall?

- Customers believe the goal is essential so that standards do not slip.
- Due to lack of personal experience of the issue and interpretation that only very few homes are impacted, most admit other initiatives resonate stronger with them and should be prioritised over this goal.

What do customers think of Thames Water's plan?

- Customers support the plan, although the majority feel that the timescale to achieve behavior change is slow and believe this can be done faster.
- A small minority feel that working with local councils could hasten positive behavior change.

In their own words

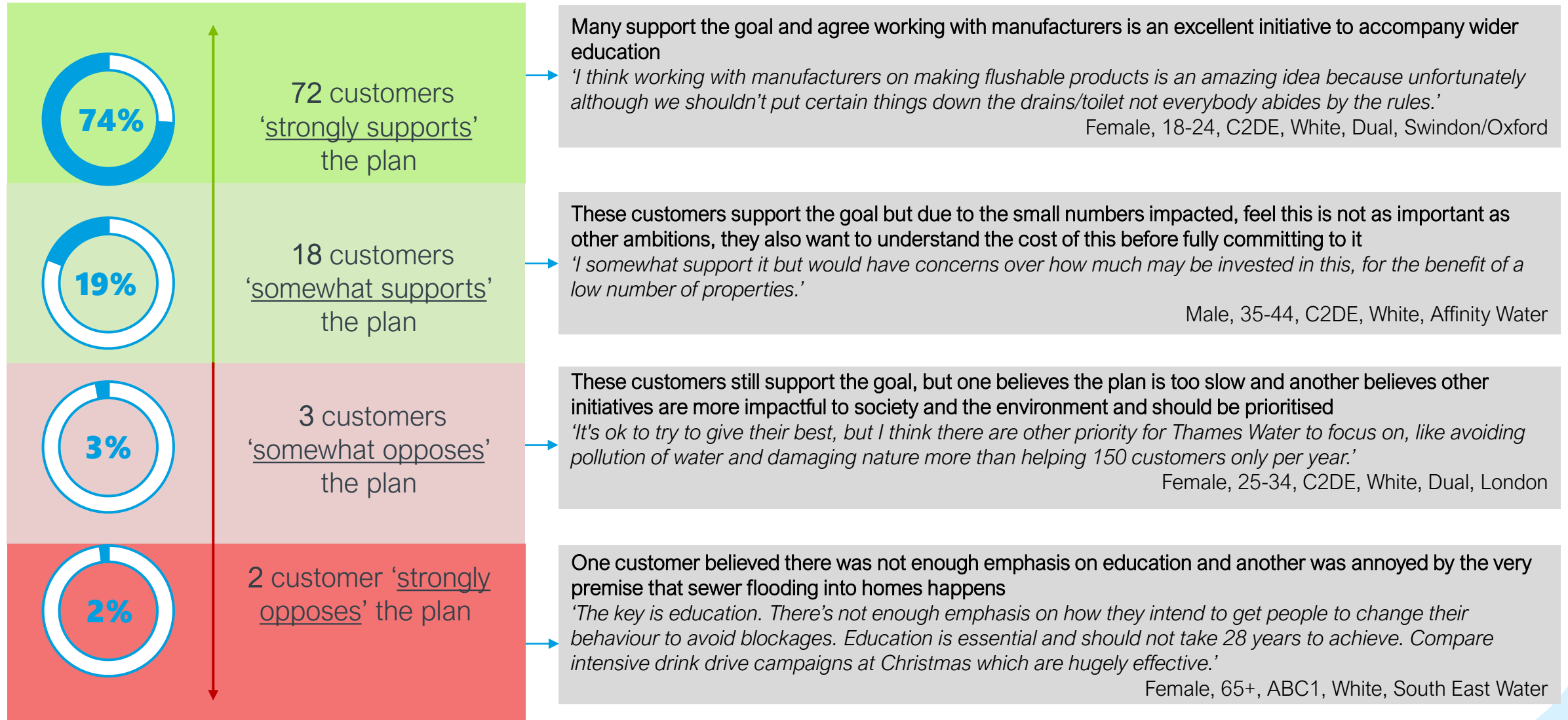
I think that this is a fair goal. Especially considering that TW needs to educate the consumer (it takes a long time and a lot of work to change people's habits), and work with manufacturers on this too, which will also take a long time to get processed changed.

Female, 25-34, ABC1, White, Dual, London

All these measures seem good ways to tackle the problem. sewer monitors are an interesting idea, but I am not sure how they would work. Customers need to be addressed in various languages and it would help if Thames Water worked in conjunction with local councils if a problem is ongoing, to ensure that people understand the consequences of their actions.

Female, 65+, C2DE, White, Dual, London

Stopping all sewage flooding is strongly supported by most customers to ensure the situation does not get worse and begin to affect more customers, as long as it won't hold up other goals



Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers

Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers

What is this about?

- When it rains heavily the sewer network can become overloaded causing diluted sewage to sometimes spill over and pollute rivers and streams.

Where are Thames Water now

- Last year there were about 300 incidents of river pollution following sewage spills, 13 of these incidents were deemed serious.

How do Thames Water compare to other water companies?

- Thames Water's level of pollution incidents are lower than the average for all water and waste companies in the country.

Where do Thames Water want to be by 2050

- **No** river pollutions from sewage spills, and **no** serious pollutions by 2027.

This is from the theme of WASTE AND RIVERS: *Prevent all sewer flooding and wastewater pollution and lead the effort to restore the quality of rivers and streams*

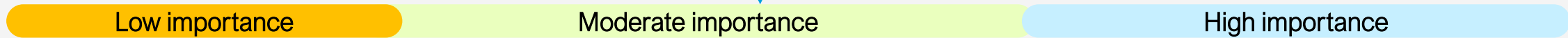
How Thames Water can improve by 2050

- Dedicated rainwater drains will be built, separate to sewers.
- Problems such as blockages will be identified by new sewer monitors, so they can be proactively fixed before sewer floods occur.
- The Thames Tideway super sewer in London will be complete by 2025 which will greatly increase the capacity for sewage and rainwater, preventing overflows into the river Thames.
- Where sewer spills do occur, Thames Water will respond more quickly to reduce the duration and impact of the spill.

Some customers have a high level of interest in preventing sewage spills into rivers, yet for some it is not their main priority

Summary overview:

For most customers preventing sewage spills into rivers is an important issue due to the potential health risks. Those personally affected are particularly frustrated by previous experiences of flooding in their area. While customers see the importance of this, they also acknowledge other issues to be more of a priority if they aren't directly impacted by this issue



What's important/unimportant?

- The potential impact sewage overflows can have on both local environments and communities means it is an important issue for many.
- However, this issue is more relevant to those who live near a river and so doesn't have the same shared level of importance amongst all people.

How is Thames Water currently performing?

- Most feel that Thames Water is performing well, with many pointing out that the number of pollution incidents is lower than other companies.
- There are many that believe there is a lot to be done and achieved but the overall goal can be accomplished within the proposed timeframe.

In their own words

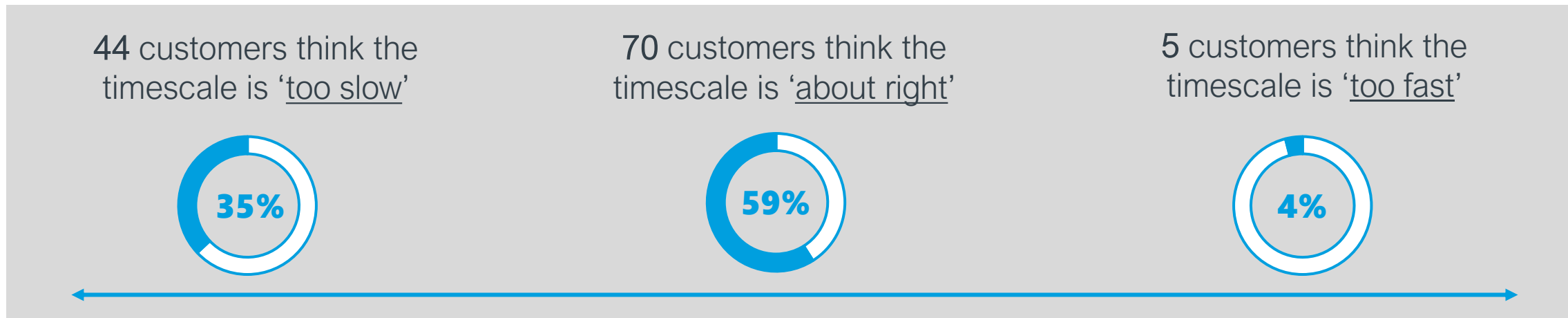
Nobody wants sewage spills.... dangerous to wildlife, people and the general environment. I have never had experience of a sewage leak but a friend of mine has. It was a nightmare and they thought the smell would never go. Sewage spills into rivers would be spreading it possibly for miles and be extremely difficult to clean up.

Female, 65+, ABC1, White, Vulnerable, Dual, London

Selfishly it's not an important issue to me because I don't live near a large river so don't feel it would affect me. So for me it isn't a priority.

Female, 55-64, ABC1, 50+ employees, Non-water reliant, Business customer

Most customers feel the timescale for preventing sewage spills is 'about right', yet there are some who want Thames Water to be more proactive



What do customers think about the goal overall?

- This goal is largely supported by customers that welcome the 2027 target of no incidents.
- Some believe Thames Water should be more proactive when it comes to this issue and implement more preventative measures.

What do customers think of Thames Water's plan?

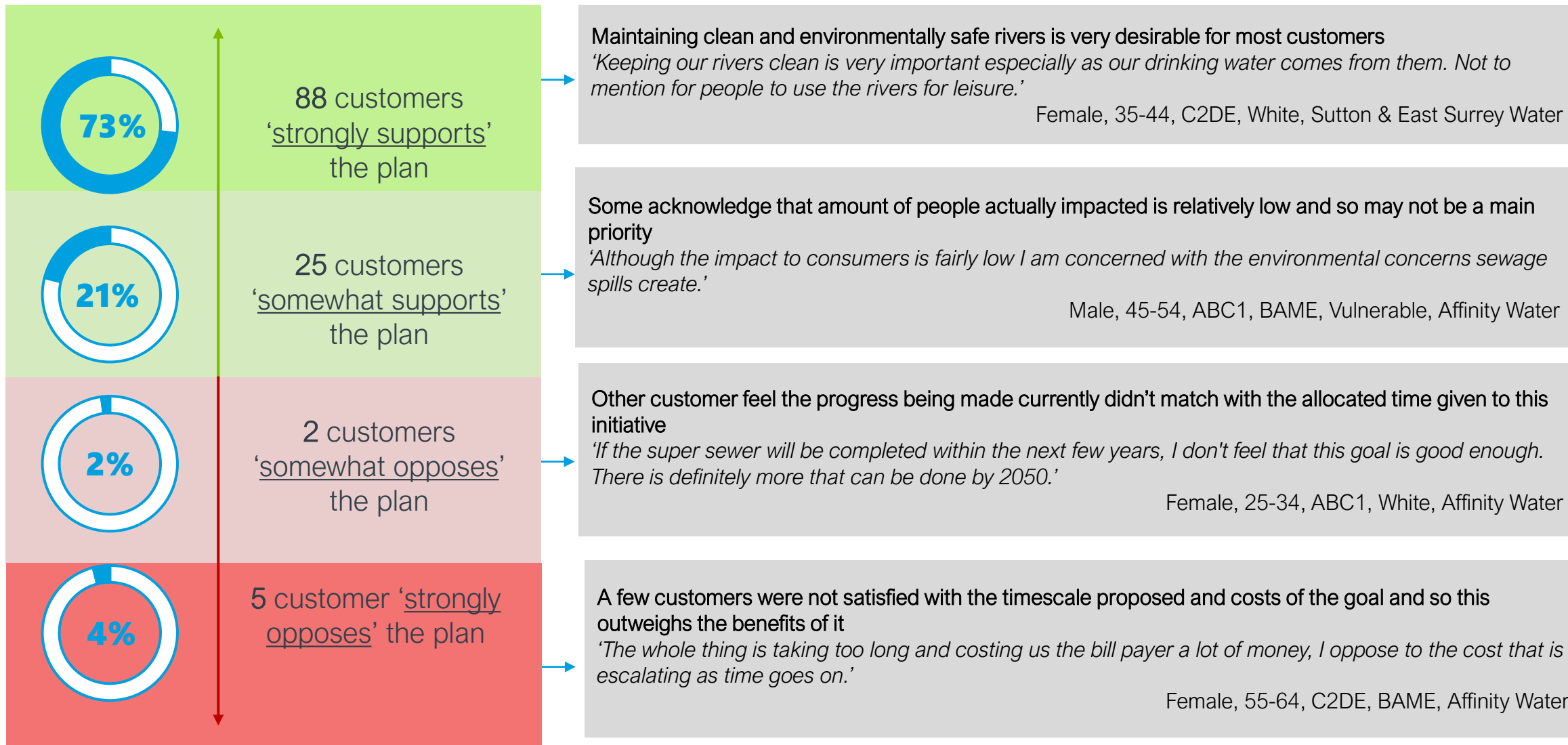
- Most feel it is Thames Water's responsibility to be involved, but also the wider community could help with this goal.
- Many people are very receptive for the completion of the Thames Tideway super sewer and optimistic it will help achieve this goal.

In their own words

I think it is a good goal to have and seems like they are on their way to achieving this with the Thames Tideway super sewer due to be built by 2025.
Male, 25-34, ABC1, BAME, Sutton & East Surrey Water

They have to be involved as this is their main job: delivering clean water to customers. I think their plans are ok, but they should be done more, maybe involving volunteers to work faster, it would be beneficial for everyone.
Female, 25-34, C2DE, White, Dual, London

Preventing sewage overflows into rivers is strongly supported by most customers



Lead the improvement of rivers in the region so they become among the healthiest in the UK

Lead the improvement of rivers in the region so they become among the healthiest in the UK

What is this about?

- Thames Water want to take a leading role alongside the Environment Agency and other industries, to create healthier rivers in its region.

Where are Thames Water now

- Only 3% of rivers in our region have 'good' environmental status and none are officially safe to swim in.

How do Thames Water compare to other water companies?

- 14% of rivers across England have 'good' environmental status.

Where do Thames Water want to be by 2050

- 75% of rivers in the region will be at 'good' environmental status and there will be 10 river areas designated safe for swimming.

This is from the theme of WASTE AND RIVERS: *Prevent all sewer flooding and wastewater pollution and lead the effort to restore the quality of rivers and streams*

How Thames Water can improve by 2050

- Taking a leadership role with the Environment Agency, agricultural organisations and other environmental groups to create healthier rivers.
- Improving rivers by tackling sewage pollution; reducing how much water is taken from vulnerable streams for drinking water, and structural improvements like returning rivers to a more natural state by removing man-made structures.
- Helping communities to enjoy rivers more by improving the diversity of wildlife and safer conditions for fishing, swimming and water-sports.

Some customers express the importance of having environmentally healthy rivers, whereas a few customers have less concern of this

Summary overview:

Enjoying rivers for recreational purposes is what makes this initiative important for some, as they are surprised at how few have a 'good' environmental status. For other customers, the environmental element is more important, to ensure future generations can enjoy rivers. However, others feel that this issue is more exclusive to people who frequent rivers regularly and thus not a priority to themselves personally.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Many think it's important to maintain rivers for both environmental and recreational purposes.
- Customers feel that they are unsure of the scope of this project and how achievable it will be for TW.
- However, some weren't sure of the day-to-day benefit of this goal and so question it's purpose.

How is Thames Water currently performing?

- Most feel Thames Water are performing poorly as only 3% of the region's rivers have a good environmental status.
- Some feel that the aim of 75% of rivers to be at a good status was commendable but they were not clear how this will be achieved.

In their own words

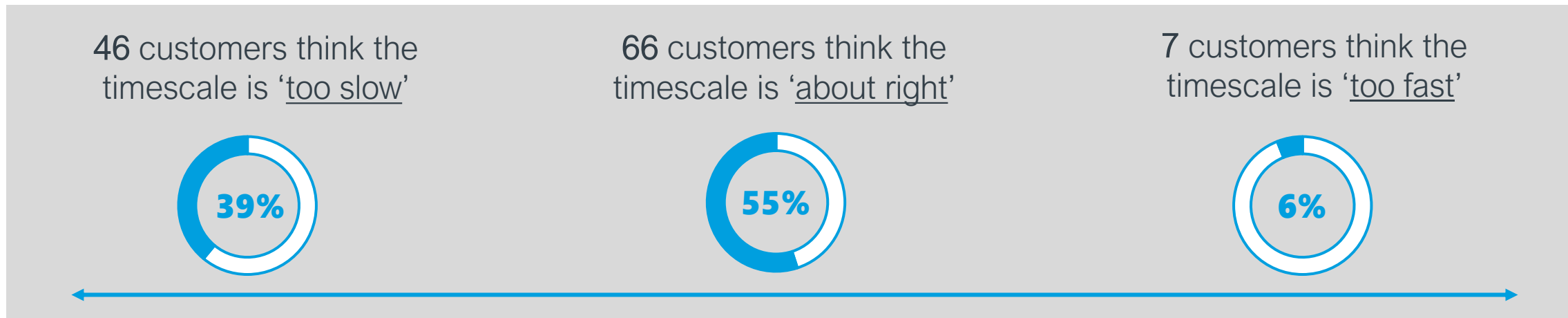
I do not agree with this goal on spending a lot of money so a few people can enjoy the rivers for a few months of the year. We live in cold climate and much of our rivers and activities are only used in the warmer months. A few select projects are ok, but to aim to clean up every single river is not realistic and only adds costs to the consumer.

Female, 65+, ABC1, White, Vulnerable, Dual, London

Yes this is important. I would love to be able to take my children swimming in the river safely.

Female, 35-44, C2DE, White, Sutton & East Surrey Water

Most customers feel the timescale for improving river health is 'about right', while some customers feel the initiative doesn't go far enough



What do customers think about the goal overall?

- The goal is largely supported by customers who believe it will have a positive impact on communities and wildlife.
- Yet, a few feel improving 75% of rivers didn't go far enough before 2050 and more can be done sooner.

What do customers think of Thames Water's plan?

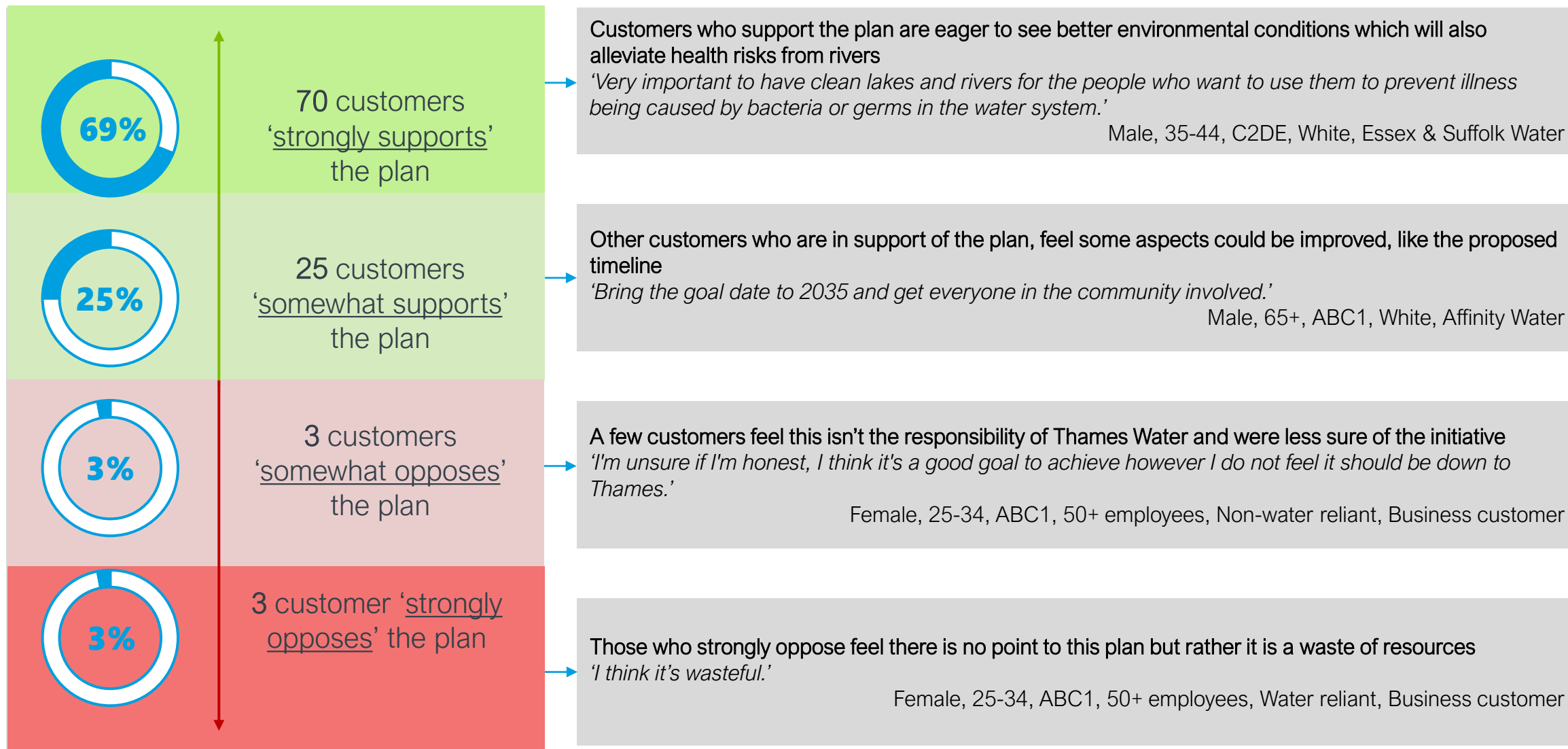
- Most feel that Thames Water should be involved and welcome the collaboration with other groups like the Environment Agency.
- For some, they are unsure of Thames Water's motivations to take on a leadership role in this issue.

In their own words

I think this is something that Thames Water should be getting involved in. It is good that the plan to address this issue involves environmental & agricultural groups & organisations
 Male, 25-34, ABC1, BAME, Sutton & East Surrey Water

Its good that TW are planning to deal with sewage pollution but I hope that their leadership role with the Environmental Agency does not lead to initiatives that benefit them more than dealing with the rivers
 Female, 25-34, C2DE, White, Dual, London

The improvement of river health was ‘strongly supported’ by most customers but some feel it can be achieved a lot sooner



Help reduce disruptive rainwater flooding

Help reduce disruptive rainwater flooding

What is this about?

- After heavy rainfall sewers can become full, so additional rainwater can't drain away quickly enough, causing floods to land, road and properties.

Where are Thames Water now

- During recent stormy weather there have been a number of localised and widespread incidents of disruptive rainwater flooding.

How do Thames Water compare to other water companies?

- This can happen anywhere in the country, but it is a particular issue in London because there are more pipes there that take both rainwater and sewage.

Where do Thames Water want to be by 2050

- No disruptive rainwater flooding incidents.

This is from the theme of WASTE AND RIVERS: *Prevent all sewer flooding and wastewater pollution and lead the effort to restore the quality of rivers and streams*

How Thames Water can improve by 2050

- Thames Water will adapt and enlarge sewers and sewage treatment works to increase capacity for sewage and rainwater in the case of heavy rainfall.
- Dedicated rainwater drains will be built, separate to sewers.
- 'Green' drainage will be built in places where there is a lot of concrete and tarmac, by adding grassy areas or gardens that can soak up rainwater rather than it run into drains or sewers.

Previous flooding experiences place disruptive rainwater flooding at high importance for some. A few customers question the reality of being able to predict future flooding events

Summary overview:

This is an important issue for some customers because they have first-hand experience (or know someone who has been impacted) with flooding and its destructive disruptions. A few feel flooding to be unpredictable and difficult to fully prevent, therefore not a top priority issue for Thames Water to be involved in.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Many customers are concerned about the potential damage to their homes that flooding could cause.
- Concerns about quality of life for future generations, and the protection of wildlife come through as well.
- However, it is less urgent to those who don't live in a flooding zone currently.

How is Thames Water currently performing?

- Most feel Thames Water are performing adequately but that they didn't have enough information to put this in any context.
- Some suggest that Thames Water have a particularly difficult challenge due to having to manage the London area.

In their own words

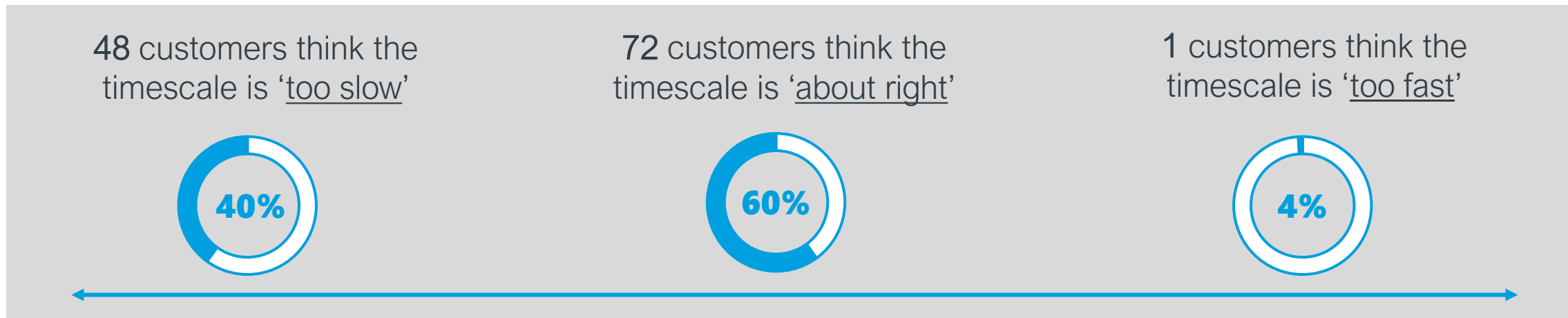
I think it's important but it's an unpredictable event that can be quite hard to deal with. So whilst I think it's important there are perhaps other areas that require more attention.

Female, 25-34, ABC1, White, Dual, London

I can imagine flooding will become a more frequent issue in London as the effects of climate change begin to take hold so building infrastructure capable of dealing with this is absolutely critical

Male, 25-34, C2DE, BAME, Affinity Water

The majority think the timescale for reducing disruptive rainwater flooding is 'about right'. However, some customers who live in flood zones, feel there is more of an urgency



What do customers think about the goal overall?

- The goal is largely supported by customers who feel it is achievable and an essential preventative measure, especially considering climate change.
- A few question whether it can be accomplished due to the unpredictable nature of floods.

What do customers think of Thames Water's plan?

- Most feel it makes sense for Thames Water to get involved because of their plans for new drainage infrastructure.
- Some customers particularly like the plan for 'green drainage' and environmental forward thinking.

In their own words

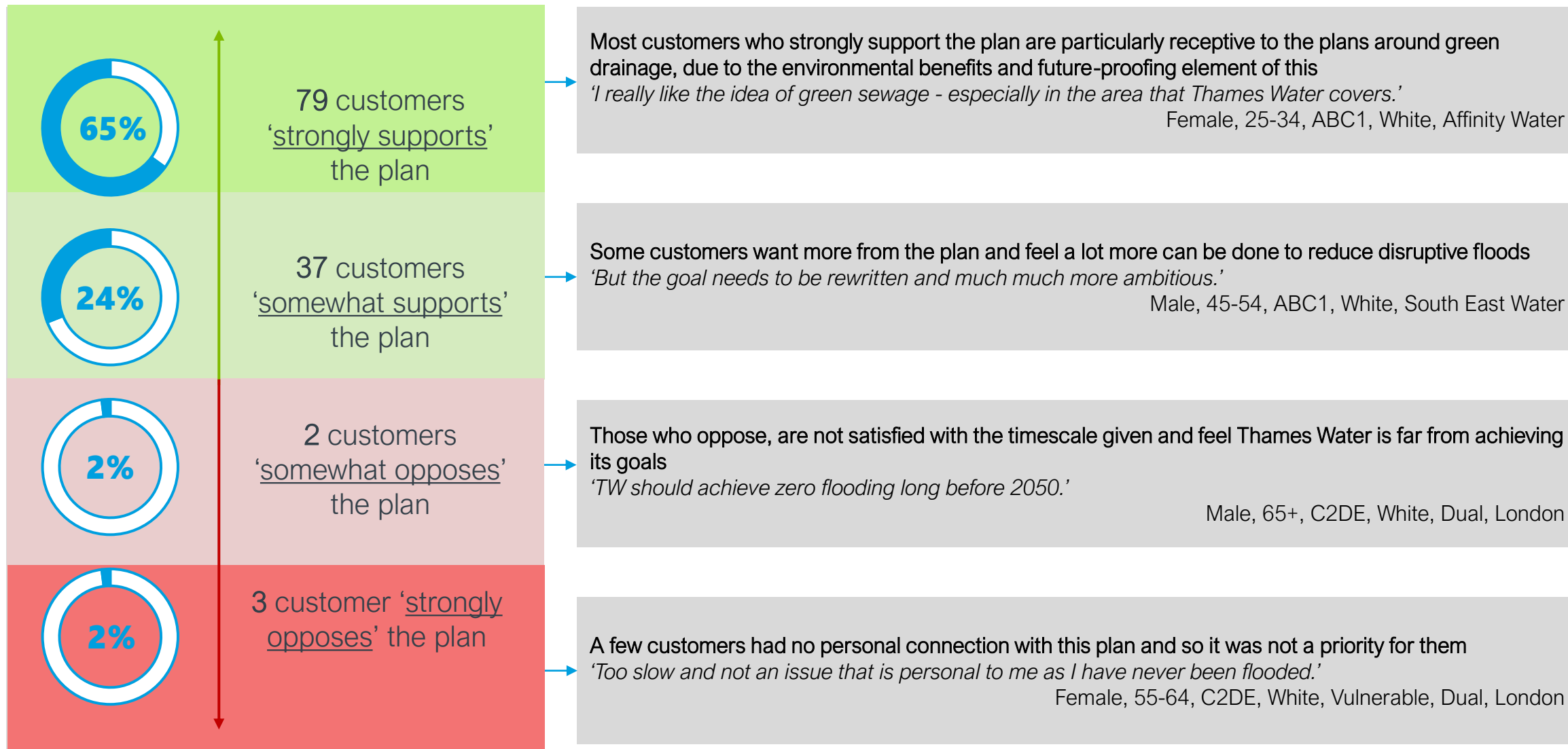
This is an important goal because the problem seems to be getting worse and worse now, so something needs to be put in place soon to try to mitigate these issues.

Female, 25-34, ABC1, White, Dual, London

I think this is something that Thames Water should be getting involved in, the plan to address this issue seems good with the increased capacity for sewers & treatment works as well as dedicated rainwater drains & green drainage.

Male, 25-34, ABC1, BAME, Dual, London

Helping reduce disruptive rainwater flooding is 'strongly supported' by most customers



Fix service issues on the same day

Fix service issues on the same day

What is this about?

- When customers experience problems with their water or sewerage service or bill they expect this to be resolved quickly.

Where are Thames Water now

- While emergency issues are often resolved on the same day, this isn't always the case, and other kinds of issues can **take much longer to fix**. Dissatisfied customers often say it took too long to fix their issue.

How do Thames Water compare to other water companies?

- Thames Water are currently last in rankings for customer satisfaction, compared with the other water and waste companies in the country.

Where do Thames Water want to be by 2050

- Customers will have service issues **resolved the same day** that they report a problem.

This is from the theme of CUSTOMER:
Deliver great customer service and value for money

How Thames Water can improve by 2050

- An improved, quicker process of handling a query, from initial contact to being resolved.
- An improved way of informing customers if an unforeseen problem happens on the water or waste network which impacts their service, with more staff available to handle queries through different communications routes at these times.
- An improved way of monitoring the water and waste network to spot any early signs of a problem so that things can be fixed the same day.

Fixing service issues on the same day is essential for most customers

Summary overview:

Fixing service issues on the same day is important for most customers. All customers expect a great customer service from Thames Water and whether they have already experienced issues or not, they would like issues fixed as soon as possible.



Low importance

Moderate importance

High importance

What's important/unimportant?

- It is of great importance having service issues solved within 24 hours.
- Customers are concerned about the impact these issues might have on their property and wellbeing.
- Business customers are mainly concerned about the impact these issues might have on their finances.

How is Thames Water currently performing?

- Most are disappointed in Thames Water's performance here, being the lowest ranking for customer satisfaction.
- Most suggest this is something Thames Water should focus on to improve.

In their own words

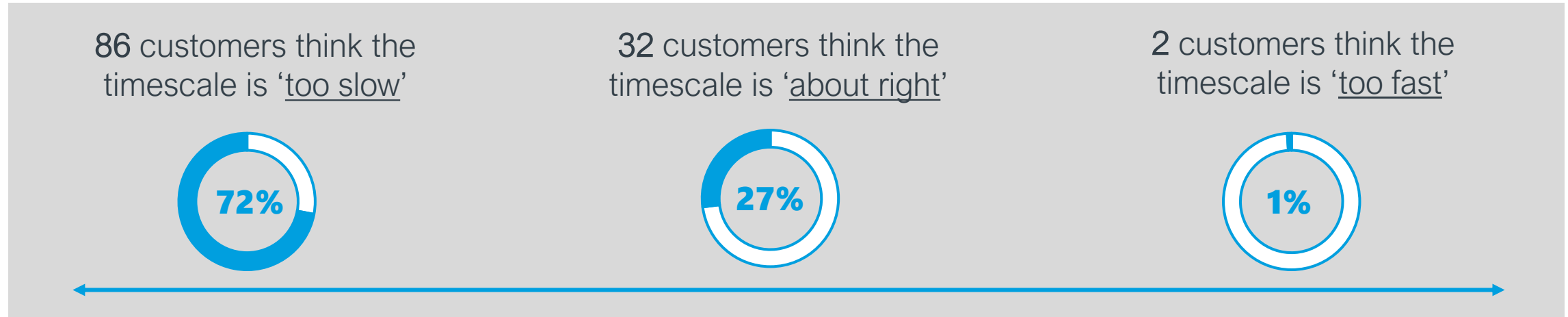
It is an important, because the longer the water is off due to unforeseen issues, my business would have to close and I'm in a loss of finance. Having immediate response and being resolved within 24hrs would be necessary for us.

Female, 25-34, ABC1, 0-9 employees, Water reliant, Business customer

Any issues that customers face should be dealt with as quickly as possible in my eyes. It is something which Thames Water should be facing the reality about if they have the worst customer service rates.

Male, 45-54, ABC1, BAME, Vulnerable, Affinity Water

For most, the timescale for fixing issues on the same day is 'too slow', therefore would like to see urgent changes



What do customers think about the goal overall?

- The goal is strongly supported, largely due to the perceived importance of having an efficient customer service and same-day repair.
- Many would like more details as to how the goal will be achieved.

What do customers think of Thames Water's plan?

- Most believe that customer service should be at the core of Thames Water's business and feel it is imperative for Thames Water to improve.
- For the vast majority of customers this goal seems slow. They think this can be achieved within a shorter timeframe.

In their own words

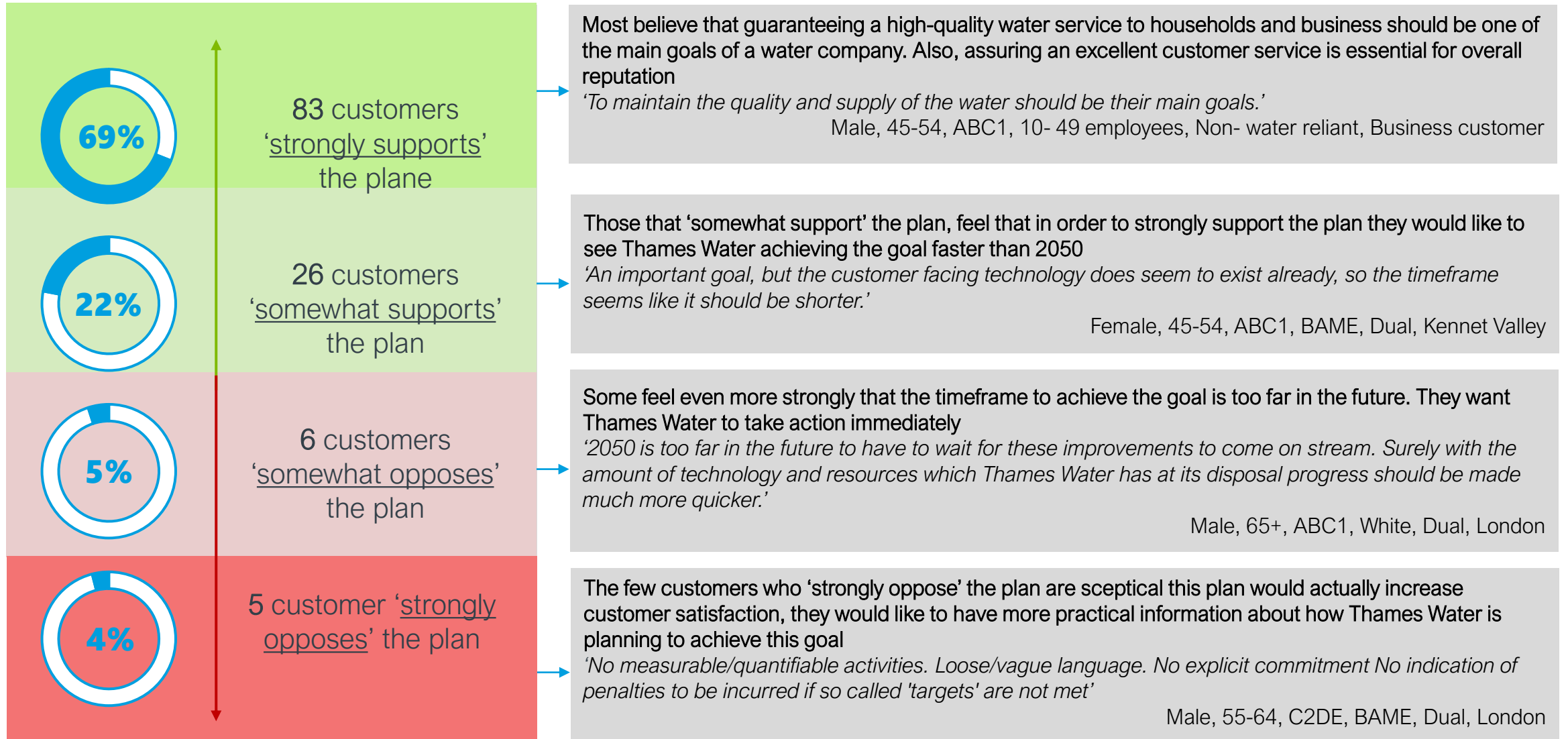
I think 2050 is too far off, but the goal itself is a good one. I'd like to know how the goals will be achieved - will it just be a case of hiring more staff? Will methods and operating procedures be changed? Will the improvements initially cause further issues?

Female, 25-34, ABC1, White, Affinity Water

Do TW seriously expect anyone to get excited about service levels improving in 28 years time? The timescale is ridiculous - improvements need to be made now. Poor service levels should be addressed by an action plan that has specific and measurable objectives for improving service levels, perhaps with harder targets over subsequent years. I would have thought a 5-year plan for improving service levels would be more reasonable, not 28 years!

Male, 55-64, ABC1, White, Sutton & East Surrey Water

Fixing service issues on the same day is strongly supported by most customers



Keep bills affordable and show that services are value for money

Keep bills affordable and show that services are value for money

What is this about?

- Customers want our services to be value for money and affordable.

Where are Thames Water now

- Thames Water's average yearly bill for households is currently £423.
- 3% of all customers are supported with reduced tariffs, including those with water-dependent medical conditions such as kidney dialysis.

How do Thames Water compare to other water companies?

- Thames Water's average yearly bill is slightly higher than the national average of £419.

Where do Thames Water want to be by 2050

- Customers will consider their water bills value for money and affordable for all.

This is from the theme of CUSTOMER:
Deliver great customer service and value for money

How Thames Water can improve by 2050

- Value for money will be greater, with an improved service, environment and community focus.
- Thames Water will continually look for ways to become more efficient so that the money from customers' bills go further.
- Thames Water will proactively identify customers that require help paying their water bills, and will offer financial support where it is needed.

Keeping bills affordable and value for money is important for many

Summary overview:

Keeping bills affordable and showing that services are value for money are important issues for most customers due to the increase in the cost of living. Showing good value for money takes on a greater importance, with customers wanting to know their money have been spent well.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Keeping bills affordable is very important for customers, especially with the cost of living going up being top of mind currently.
- Thames Water's service needs to show value for money to reassure customers' money has been spent properly.
- Future customers are less worried because they are not directly involved now, but they are aware this would be a concern in the near future.

How is Thames Water currently performing?

- Most believe Thames Water is currently performing reasonably well. Yet some expect bills should be in line with those from other water companies.

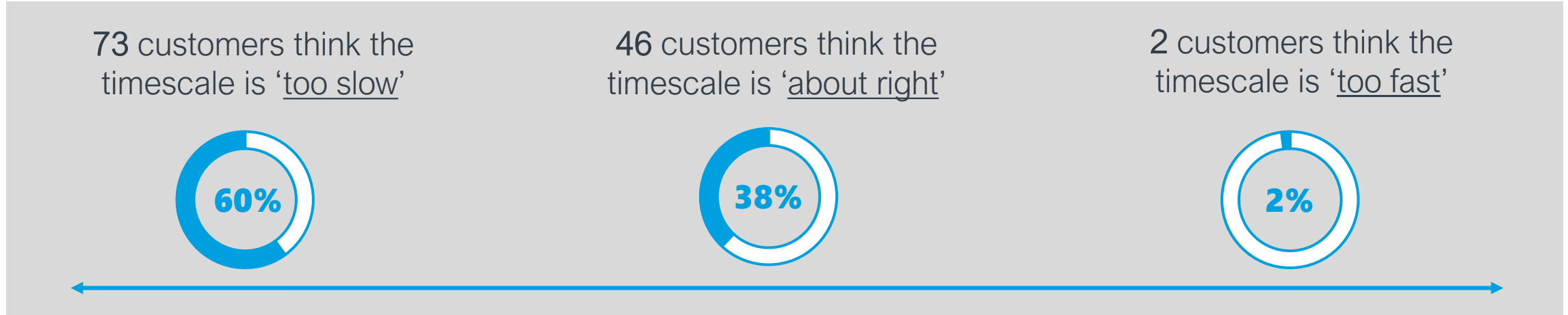
In their own words

Value for money is what everyone wants and with rising bills it needs to be shown where the money is going. The area Thames Water serves is larger than the others so I would expect some difference in bills. Its a relevant goal to have.
Female, 55-65, ABC1, White, Vulnerable, Slough/Wycombe/Aylesbury

Yes. It is a very important issue as we all pay to get this service from Thames Water. If they help us to reduce the cost. They will proactively find the customers struggling to pay their bills and help them financially.
Male, 65+, ABC1, BAME, Sutton & East Surrey Water

Currently I feel Thames water isn't performing too bad on this goal, although their bills are £4 higher than other companies which isn't fair and should be lowered in line with the other companies.
Male, 35-44, C2DE, White, Essex & Suffolk Water

For many the timescale for keeping bills affordable and value for money is 'too slow', yet a sizable amount believe it is 'about right'



What do customers think about the goal overall?

- The goal is largely supported by customers. It feels achievable and realistic.
- A small minority are sceptical about how the goal will be achieved and feel Thames Water should better define their plan for this.

What do customers think of Thames Water's plan?

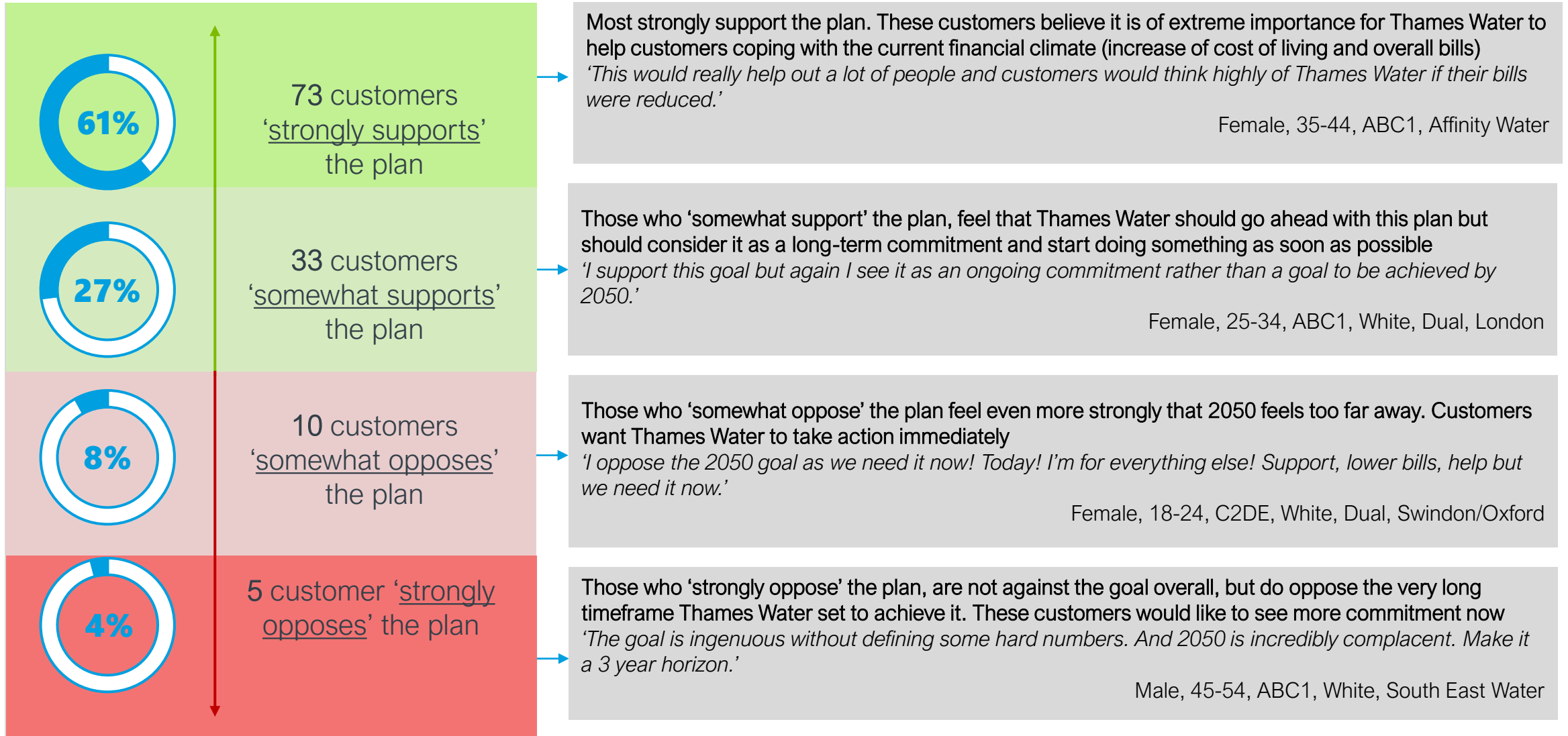
- Most feel this is sensible for Thames Water to be involved in and help customers, particularly the ones in most financial need.
- However, for many the 2050 goal feels too far away. Customers want to see a positive change in their bill savings now.

In their own words

I think it's good and in fitting with the current climate. Also making it affordable across the board is a fair point
Female, 25-34, C2DE, BAME, Dual, London

I think 2050 is too far away - the current economic climate clearly shows the problems people are facing, so if something can be done to reduce the pressure on customers, Thames Water should be making these changes as soon as possible
Female, 25-34, ABC1, White, Affinity Water

Keeping bills affordable and showing that services are value for money is strongly supported by many customers



Provide an easy and personal customer service, using the latest technology, for everyone who uses the service

Provide an easy and personal customer service, using the latest technology, for everyone who uses the service

What is this about?

- Thames Water serves many different types of customer, including householders and businesses. Service interactions include paying bills and updating accounts, fixing water supply outages and blockages, and connecting properties to the network.

Where are Thames Water now

- Customers expect their dealings with Thames Water to be easy, tailored to their needs, using a convenient method of communication. While this is often the case, customers sometimes experience service that doesn't meet their expectations.

How do Thames Water compare to other water companies?

- Thames Water are currently last in rankings for customer satisfaction, compared with the other water and waste companies in the country.

Where do Thames Water want to be by 2050

- Customers will be able to contact Thames Water in ways that best suit them and Thames Water will understand the customer's circumstances and service history.

This is from the theme of CUSTOMER:
Deliver great customer service and value for money

How Thames Water can improve by 2050

- Thames Water will adopt new technologies to keep pace with changing customer expectations.
- Thames Water will communicate in ways that suit customers.
- Thames Water will understand customers' circumstances and service history.
- There will be an improved, quicker way of handling queries, from initial contact to being resolved.
- Thames Water will proactively communicate about service and transport disruption.

Most customers want to have an easy and personal customer service with Thames Water. However other customers are already satisfied with the service they receive

Summary overview:

Many customers expressed the importance of having a line of communication they can access if a problem occurs or to receive important information. Additionally, it's important for customers to feel connected with Thames Water and their customer service facilitates. However, some feel that this isn't an urgent issue as not all customers have a frequent need to contact customer services.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Customers want to feel they can rely on Thames Water when they have an urgent problem and be able to seek guidance.
- Other customers feel satisfied with the online service available and so don't mind minimal contact.

How is Thames Water currently performing?

- Most were dissatisfied with Thames Water's current performance because it ranks last in customer satisfaction, although most had no direct experience with customer services and could only speculate why Thames Water was last.
- Some feel 2050 was not a reasonable target and improvements could be made sooner, although even those who had contacted Thames Water were unclear how specific technology could be employed to improve matters, and assumed Thames Water would have access to the same technology as other utilities.

In their own words

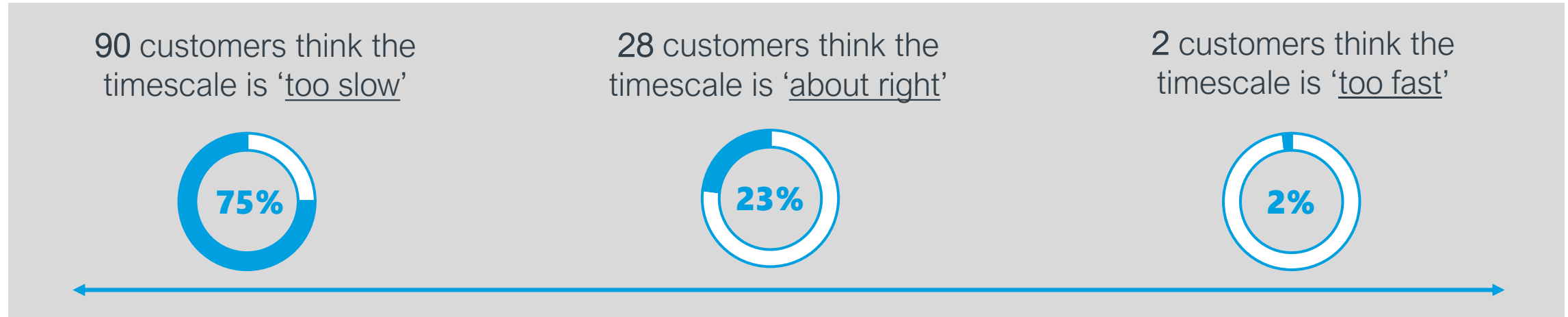
It's an important issue as customers of Thames Water should feel they can contact the company in a simple and straight forward way. Personally it's not a huge issue for me as haven't had the need to contact them in a while.

Male, 45-54, ABC1, White, Vulnerable, Affinity Water

I've not really needed to deal with customer services, I have managed everything online to this point with no problems.

Male, 45-54, ABC1, BAME, Vulnerable, Affinity Water

A large majority of customers think the timescale to provide an easy and personal customer service is 'too slow' and feel it should be achievable within the next 5 years



What do customers think about the goal overall?

- Whilst the goal is largely supported, many customers want customer service improvements to be implemented within 5 years.
- Customers support improvement in technology to facilitate customer services in order for Thames Water to catch up to other companies

What do customers think of Thames Water's plan?

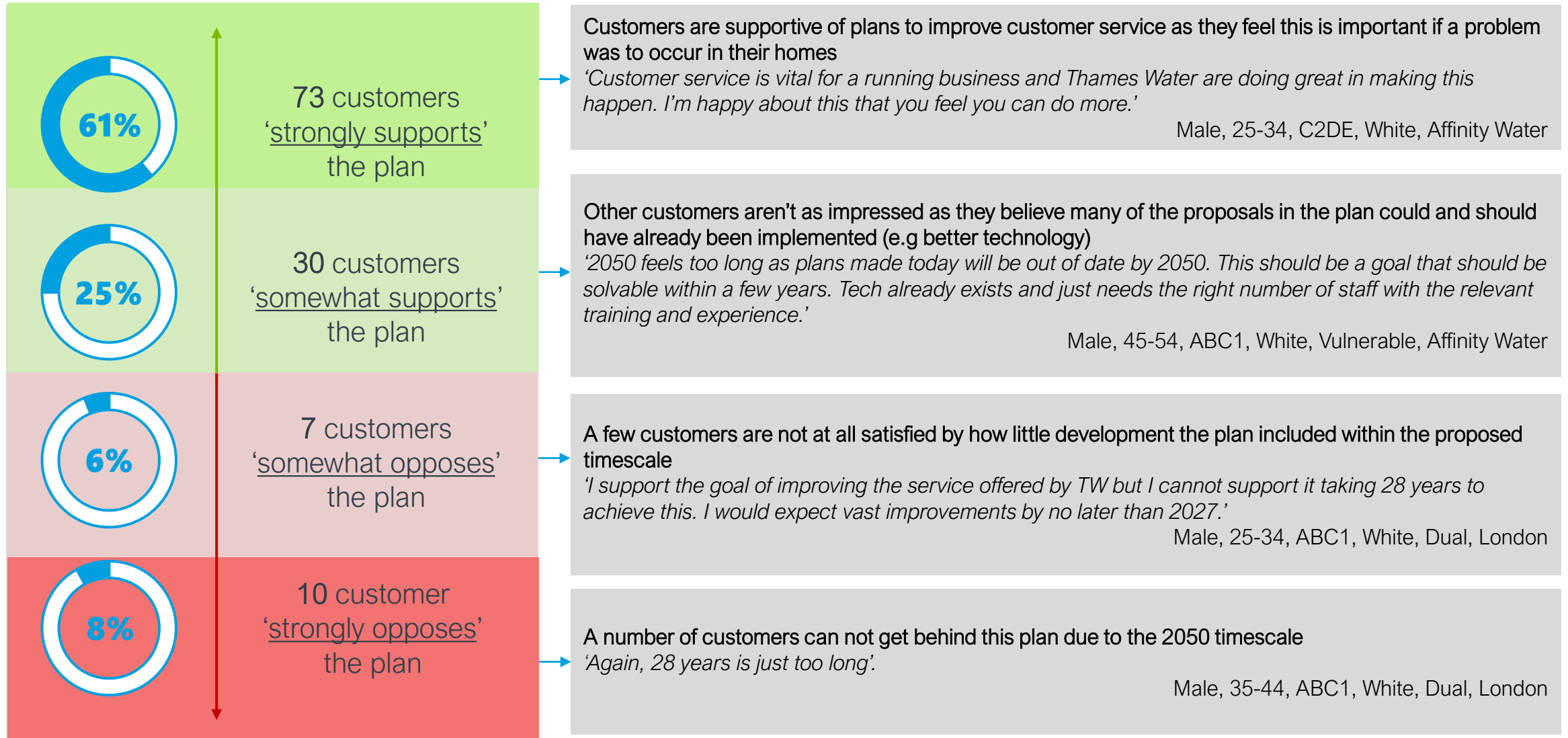
- Most feel it should be a high priority for Thames Water to actively improve their customer service.
- However there has to be more clarity on what changes will be introduced for customers to make the most use out of services.

In their own words

2050 is way too far to improve customer service ranking this should be something to achieve in the next 2 - 5 years
Female, 45-54, C2DE, BAME, Dual, London

I think they need to be looking and investing into virtual platforms as this is a good way of providing quicker and easier forms of customer service for most people nowadays.
Male, 45-54, ABC1, BAME, Vulnerable, Affinity Water

Providing an easy and personal customer service using the latest technology, for everyone who uses the service, is strongly supported, by most customers



Help tackle climate change by becoming 'net negative'

Help tackle climate change by becoming 'net negative'

(when we take more carbon out of the atmosphere than we put in)

What is this about?

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

Where are Thames Water now

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

How do Thames Water compare to other water companies?

- All water companies in the country are signed up to achieve 'net zero' operational carbon emissions by 2030.

Where do Thames Water want to be by 2050

- Thames Water will go **beyond zero** carbon emissions and actually remove more carbon than it puts in (by producing more green energy than it can use).

This is from the theme of ENERGY TRANSITION: *Help tackle climate change by becoming 'net negative' and maximise the green energy produced for ourselves and for local communities*

How Thames Water can improve by 2050

- Achieving 'net zero' operational carbon emissions by 2030, so that by 2050 the 'net negative' (beyond zero) target can be met.
- Using multiple technologies to produce green energy and use excess heat from the sewage treatment process, also installing more solar panels to float on reservoirs and placing wind turbines next to operational sites.
- Using a 100% electric vehicle fleet by 2030 for all vans and trucks.

Sustainable initiatives to tackle climate change are important for most customers but, for some, not 'essential'

Summary overview:

Becoming 'net negative' is an important issue for most customers, with climate change top of mind. However, this support is only in 'isolation' for some, when compared against other issues, they would rather see priorities go elsewhere.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Climate change is top of mind for many, and so initiatives like this are increasingly well-received.
- There are concerns about quality of life for future generations, and the protection of wildlife.
- However, some are sceptical of climate change or the UK's role in reducing emissions.

How is Thames Water currently performing?

- Most are pleasantly surprised at Thames Water's performance here, with the reduction of 50% of emissions standing out.
- Some suggest these schemes and achievements should be made more visible to customers.

In their own words

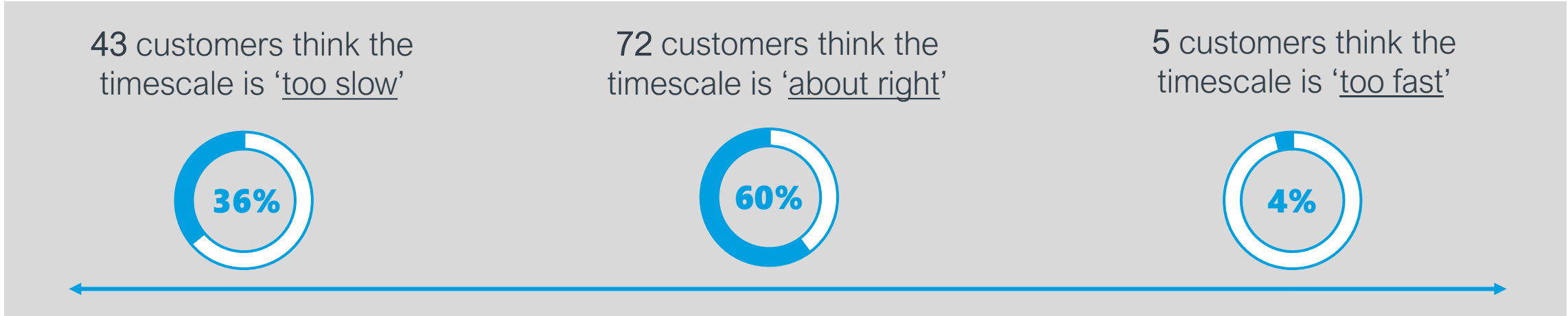
In isolation yes this is important to me. The reliance on a dwindling supply of fossil fuels forces your hand somewhat though and the situation in Ukraine obviously highlights a need to reduce reliance on imports. When looked at as part of your 2050 plan overall, the eco credentials of Thames Water are at the very bottom of the list.

Male, 45-54, ABC1, BAME, Vulnerable, Affinity Water

I think they are doing amazing. Not all companies can say they achieve half of their operational carbon emission.

Female, 25-34, ABC1, White, Dual, London

For most, the timescale to become 'net negative' is 'about right', although a sizeable minority would like to see urgent changes



What do customers think about the goal overall?

- The goal is largely supported by customers, mainly due to the perceived importance of sustainability and climate issues.
- A small minority are sceptical of the benefits for investing here, wanting the focus to be on service and quality issues.

What do customers think of Thames Water's plan?

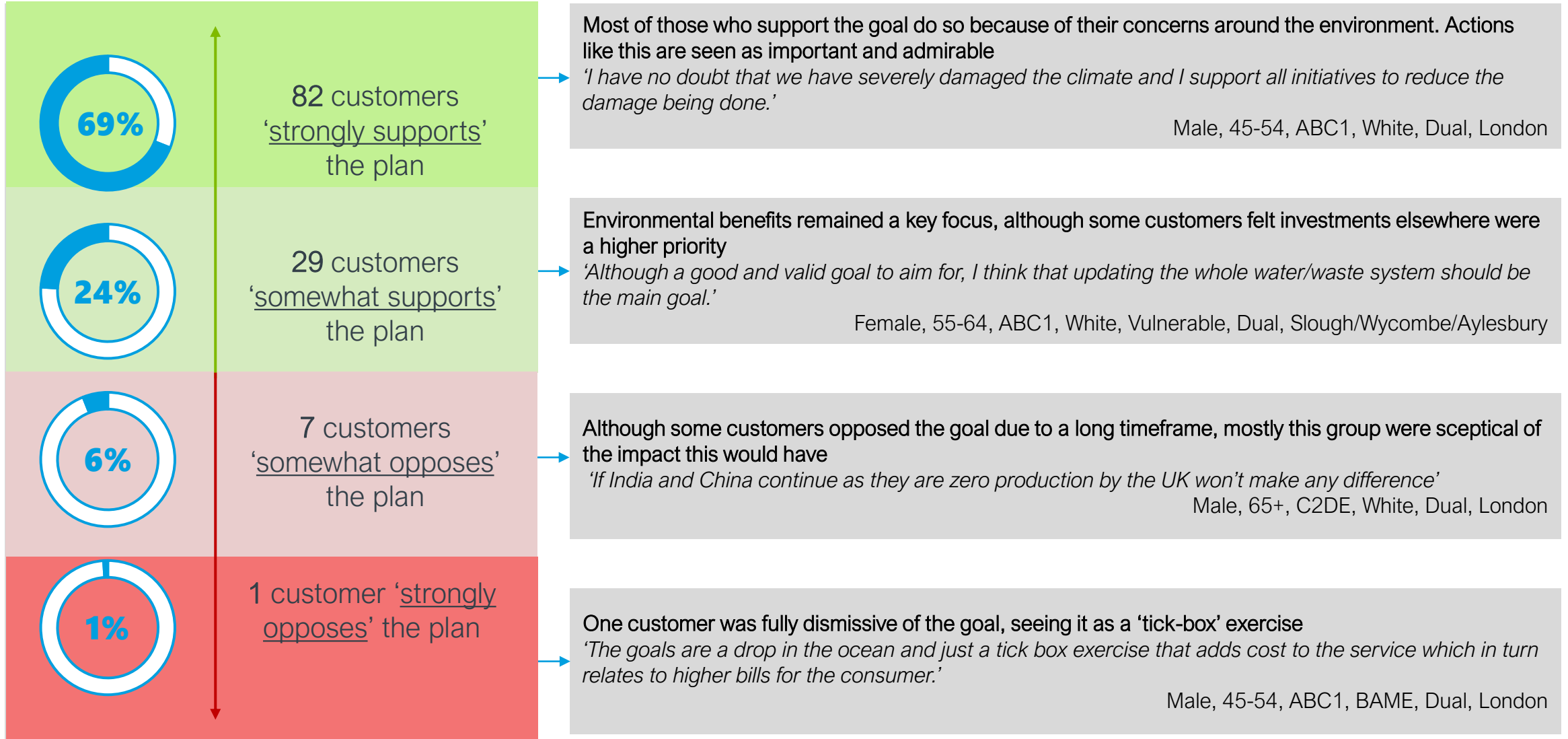
- Most feel this is sensible for Thames Water to be involved in, and are impressed at how energy is self-generated.
- For some, while the 2030 'net zero' plan is praised, this makes the 2050 vision feel slow and unambitious by comparison.

In their own words

I think it is admirable that Thames Water want to go beyond net zero and to actually be net negative. This kind of stance will truly make a difference.
 Male, 35-44, C2DE, White, Affinity Water

I think the 2050 target is rather unambitious given the intention to become net-zero by 2030 - why do they need another 20 years for this? Why not have 2040 as a target?
 Male, 55-64. ABC1, White, Sutton & East Surrey Water

Helping tackle climate change by becoming 'net negative' is strongly supported by most customers



Maximise the green energy produced for Thames Water and for local communities

Maximise the green energy produced for Thames Water and for local communities

What is this about?

- Thames Water could help other companies and communities to reduce carbon emissions by sharing the green energy it produces and by selling green technologies it has developed.

Where are Thames Water now

- 22% of Thames Water's energy needs are generated from its own renewable sources (such as the sewage treatment process).

How do Thames Water compare to other water companies?

- Some other water companies in the country generate between 10% and 28% of their own energy needs at the moment.

Where do Thames Water want to be by 2050

- 100% of Thames Water's energy needs will be generated by its own renewable sources and the **surplus** green energy will go to the National Grid. Green energy technologies will be sold to other companies.

This is from the theme of ENERGY TRANSITION: *Help tackle climate change by becoming 'net negative' and maximise the green energy produced for ourselves and for local communities*

How Thames Water can improve by 2050

- Producing more green energy (from the sewage treatment process) than it can use, so the surplus can go to the national grid.
- Excess heat from the sewage treatment process can be used to heat local homes.
- Thames Water will share its experience of developing floating solar panels, electric vehicle charging and other new methods of creating renewable green energy.
- Thames Water aims to sell these technologies to other companies who need help to reduce carbon emissions.

Energy self-sufficiency appeals to most, with current performance seen as average

Summary overview:

Being self-sufficient for energy is something most customers see as important and admirable, with space for Thames Water to lead in this space. While some customers are sceptical of the prioritisation of this over other more 'immediate' or customer-facing issues, many expect to see this type of change happen across businesses.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Climate change is top of mind for many, and so initiatives like this are increasingly well-received.
- Energy security and lowering emissions are key benefits.
- A sceptical few are unconvinced at the benefits this would bring, with more unsure at how this should be prioritised.

How is Thames Water currently performing?

- Although Thames Water is largely in line with other water companies, customers are split on their performance.
- Customers are unaware of what Thames Water has done in this area, with some feeling they should already be generating more.

In their own words

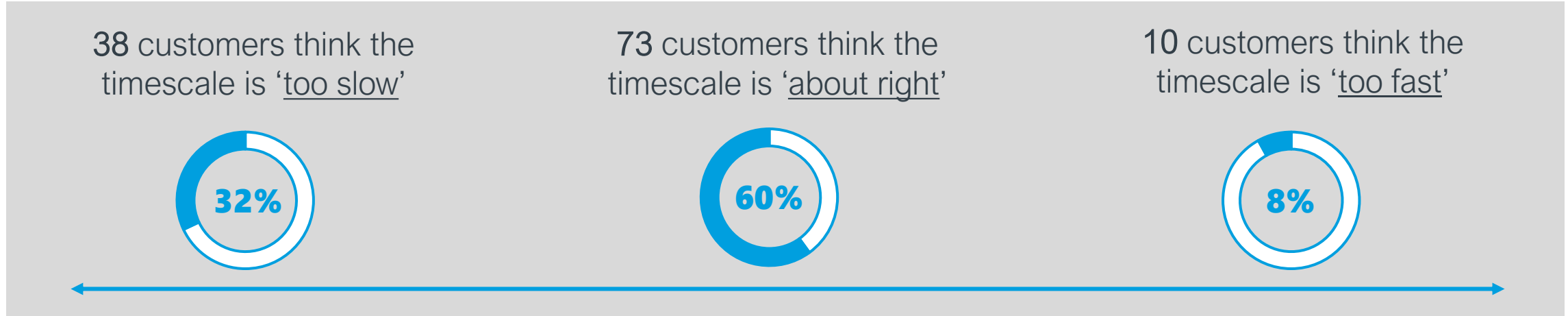
Even ignoring environmental issues - just for energy security it is important to use all economic sources of renewable energy - so I rate this as important. It should pay for itself in the longer term so I hope it won't stop any other works and I would be interested to see how it is financed.

Male, 55-64, ABC1, White, Dual, London

Why has Thames Water kept this asset a secret until now? As well as creating revenue with which to continue tackling environmental damage and climate change they could be providing green fuel to local businesses and housing.

Male, 55-64, ABC1, BAME, Dual, London

For most, the timescale for maximising green energy is 'about right', although a sizeable minority would like to see a faster uptake of this



What do customers think about the goal overall?

- The goal is applauded by most, with being self-sufficient for energy, reducing emissions and selling surplus to the National Grid being the key benefits.
- Some feel the urgency of this demands a shorter timeframe.

What do customers think of Thames Water's plan?

- Many are generally supportive, but feel the details are too sparse to cast judgement.
- A few question the return on investment for this plan.

In their own words

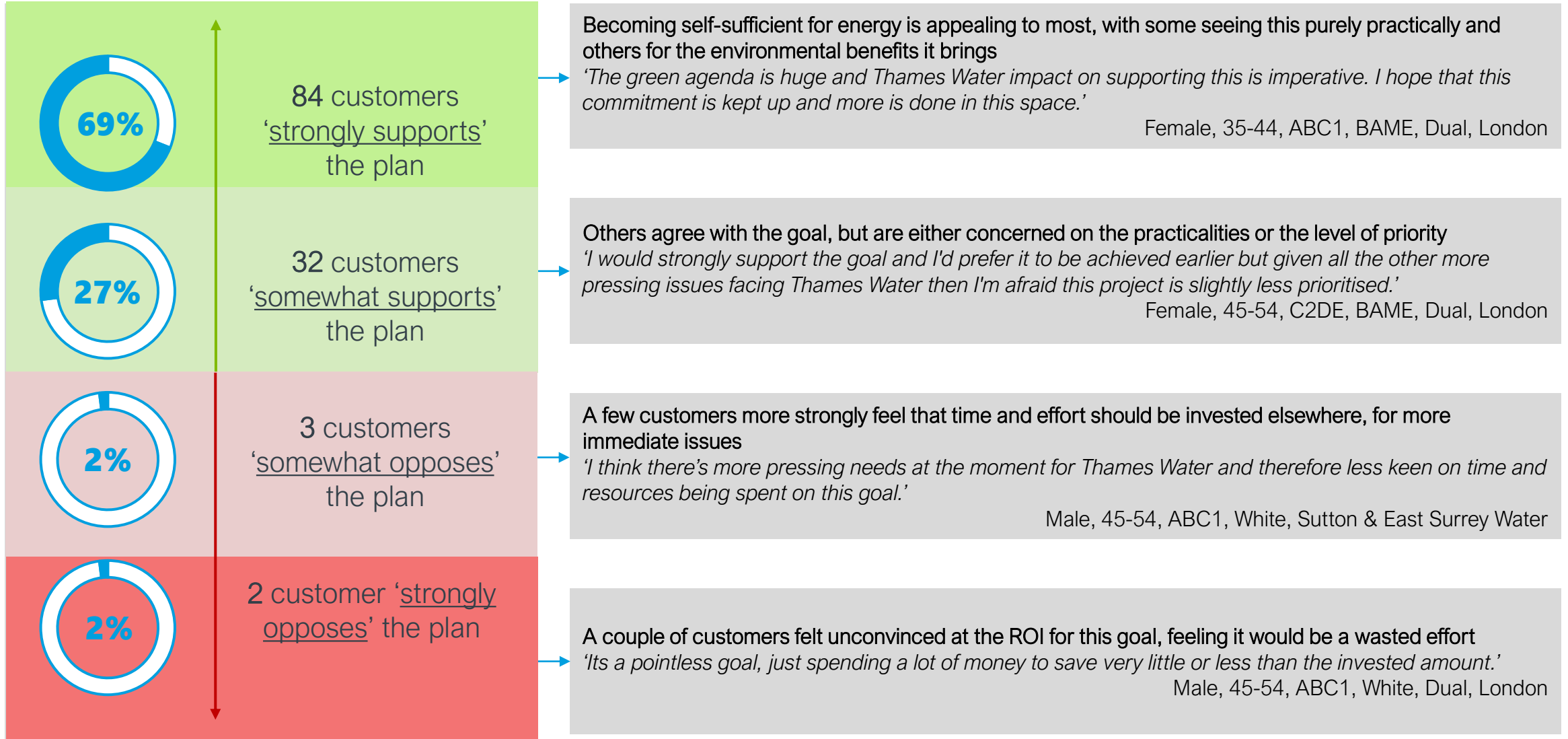
I would love to see this, given that Thames Water renewable energy will be generated 100 per cent, and the rest will go to the national grid, which is positive. In addition, green technologies will be sent to other companies which will have a positive impact

Female, 18-24, ABC1, BAME, Vulnerable, Future customer

Often the cost on projects like this outweigh the benefits. For example it may achieve £10 million pounds of savings but will cost £15M to implement and maintain. Looks great on paper but not very practical.

Male, 45-54, ABC1, BAME, Dual, London

Maximising green energy production is strongly supported by most customers



Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances

Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances

What is this about?

- Water and wastewater services should be accessible and affordable to all customers.

Where are Thames Water now

- Around a **fifth** of customers say they always or sometimes struggle to pay their water bill.
- Although a Priority Service Register exists to give customers in vulnerable circumstances extra help with their water service, **not every** eligible customer is aware they can sign up for this.

How do Thames Water compare to other water companies?

- Almost a million households in the country are on special tariffs so they pay a lower water bill, around a fifth of these customers are in the Thames Water area.

Where do Thames Water want to be by 2050

- **No** customers will struggle to pay their water bills and there will be additional support for **all** customers in vulnerable circumstances.

This is from the theme of COMMUNITIES IMPACT: *Thames Water is a force for good in communities by eliminating water poverty, providing jobs & skills and developing the land around its buildings & works responsibly*

How Thames Water can improve by 2050

- Thames Water will proactively identify customers that require financial support or would benefit from being on the Priority Services Register, and ensure these customers receive the help they need.
- This will be helped by sharing data with other organisations, such as the NHS and other utilities, so that customers don't need to apply for help multiple times.

Providing an inclusive service is well received by most customers

Summary overview:

Providing an inclusive service is an important issue for many, and those not affected recognise the importance of helping people who struggle to pay water bills. There are some concerns around who would qualify for financial support and if the government should get involved more than Thames Water.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Providing an inclusive service that everyone can afford, supporting different needs and circumstances is well received by all, particularly in the current economic climate.
- There are concerns about the ability to identify vulnerable customers and who would qualify for financial support.

How is Thames Water currently performing?

- Those that have already received support are pleasantly surprised at current performance and future plans.
- However, not all are aware of the support schemes. Some suggest these should be made more visible to customers.

In their own words

This is an issue not so much for me personally as I doubt I would ever qualify to get help. But it is important for many people in the region especially with rising costs of living and inflation set to reach 8% perhaps. Those people on fixed incomes do need the help.

Female, 65+, ABC1, White, South East Water

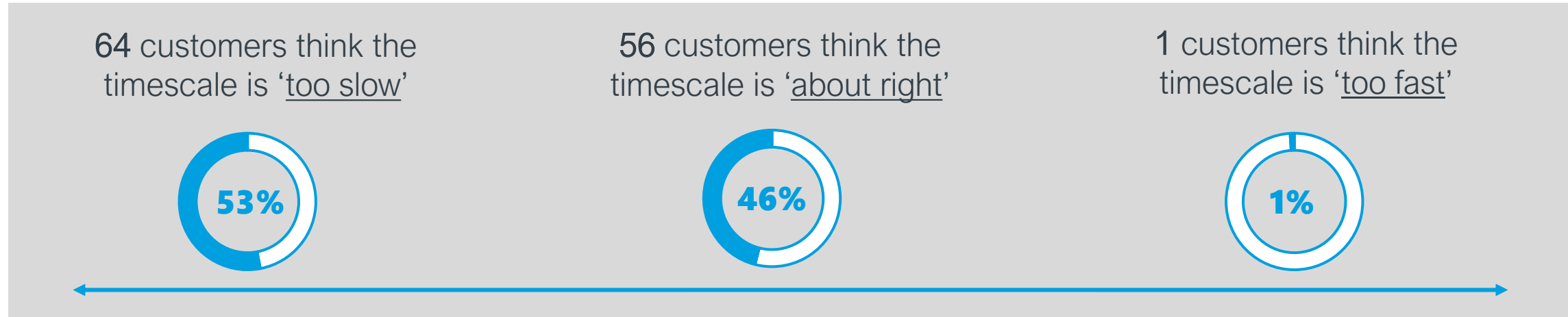
Water is necessary for everyone and no one should be in water poverty, but there are many people who struggle to pay bills who are not eligible for any benefits and I am concerned that this means such people would also be missed by Thames Water.

Female, 65+, C2DE, White, Dual, London

They have the priority services register in place, so that is a good start. However, as they mention, not everyone is aware of it or knows how to sign up for it, so they need to do a lot more work in this area.

Female, 35-44, C2DE, White, Dual, Slough/Wycombe/Aylesbury

A slim majority think that Thames Water's timescales to provide an inclusive service is 'too slow'



What do customers think about the goal overall?

- The goal is largely supported by both vulnerable and non-vulnerable customers.
- For some, Thames Water needs to guarantee a reliable system to identify customers who need financial support.

What do customers think of Thames Water's plan?

- Most feel this is sensible for Thames Water to be involved in, although some believe financial support should be co-ordinated by the Government.
- Although the 2050 plan feels about right, many would like to see this goal achieved faster.

In their own words

The plans seem to be a good starting point. However, I am unsure that the systems available to list such vulnerable people is foolproof and more needs to be done to list all such people.

Male, 65+, White, C2DE, Affinity Water

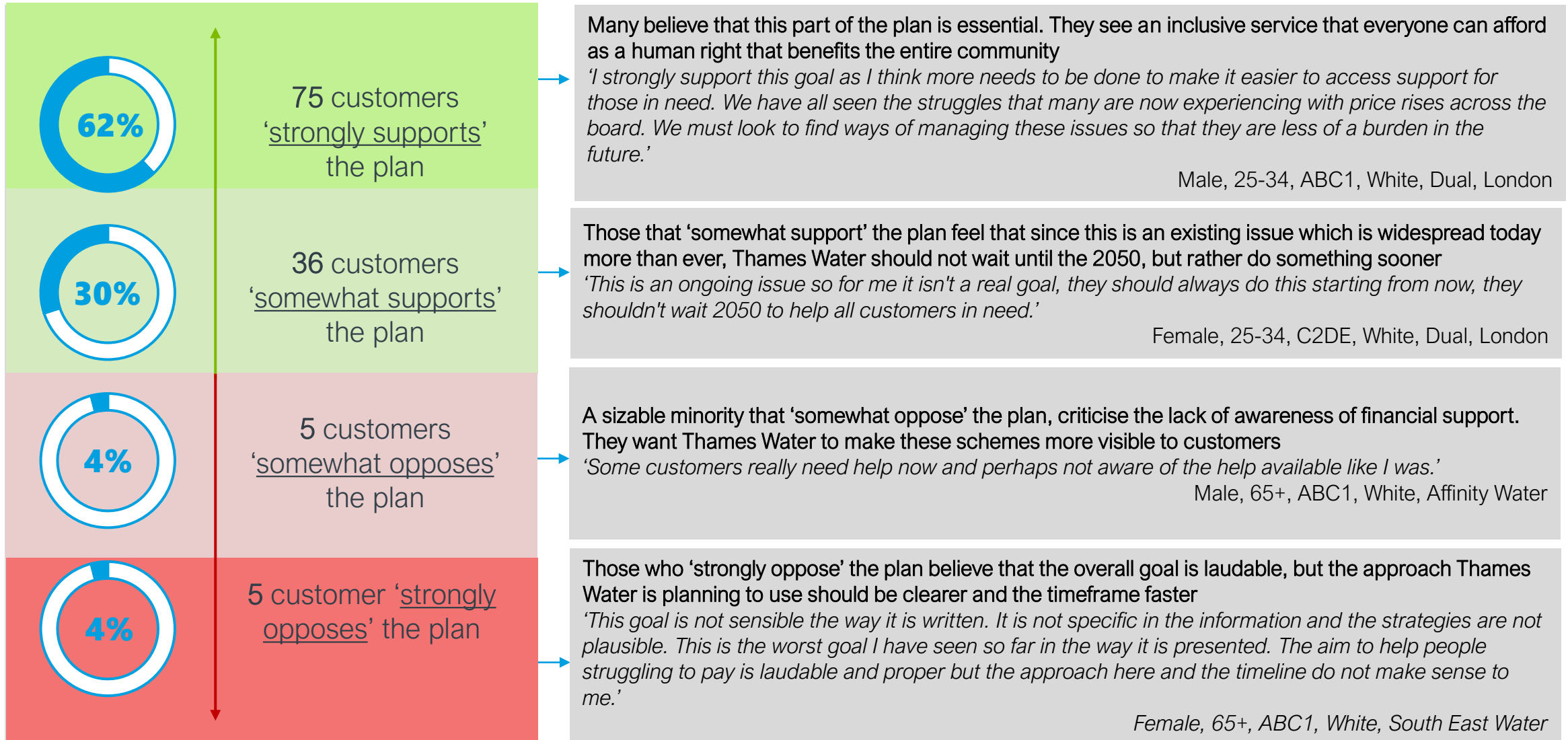
This should be fairly important but I would have thought the support would come from the Government.

Female, 35-44, ABC1, Affinity Water

Once again, the timescale is far too long. There will be vulnerable people who will be dead long before any help arrives.

Male, 65+, C2DE, White, Affinity Water

Providing an inclusive service is strongly supported by many customers



Create attractive jobs for people in our communities

Create attractive jobs for people in our communities and help develop skills

What is this about?

- Thames Water and their suppliers should reflect the communities they serve, and their employees should be fairly paid and have the ability to develop their skills.

Where are Thames Water now

- Thames Water and its suppliers run various apprenticeship schemes to help local communities to gain meaningful employment and to develop their skills. However, **Thames Water's workforce doesn't fully reflect the communities it serves** (in terms of gender, disability and ethnicity for example).

How do Thames Water compare to other water companies?

- The pay gap between males and females working for Thames Water is 15% compared to 10% for other water companies in the country.

Where do Thames Water want to be by 2050

- The workforce will reflect the diversity of communities served, and a living wage will be paid to all employees.

This is from the theme of COMMUNITIES IMPACT: *Thames Water is a force for good in communities by eliminating water poverty, providing jobs & skills and developing the land around its buildings & works responsibly*

How Thames Water can improve by 2050

- A Thames Water Academy will be formed to give skills training to existing employees and people from the communities it serves.
- There will be an 'earn to learn' programme with a strong focus on diversity, encouraging care leavers, prison leavers and young black men, for example to take part.
- All Thames Water suppliers will have a responsible employment process, including diversity policies.

Creating attractive jobs locally is important for most, but for some, isn't an immediate priority

Summary overview:

Creating attractive jobs for people in our communities is an important issue for most customers. While customers see the importance of supporting diversity and improving training, when compared against other issues this is less of a priority. Despite this, there are some who highly support this initiative.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Having equal opportunities, more diversity and guaranteed training schemes is considered essential, particularly for a large company such as Thames Water.
- Only for a sizable minority this is not something of great importance.

How is Thames Water currently performing?

- Although Thames Water performs slightly lower than other companies, most recognize and appreciate the plan.
- Customers are particularly surprised by the gender pay gap and believe this is something which should be corrected as soon as possible.

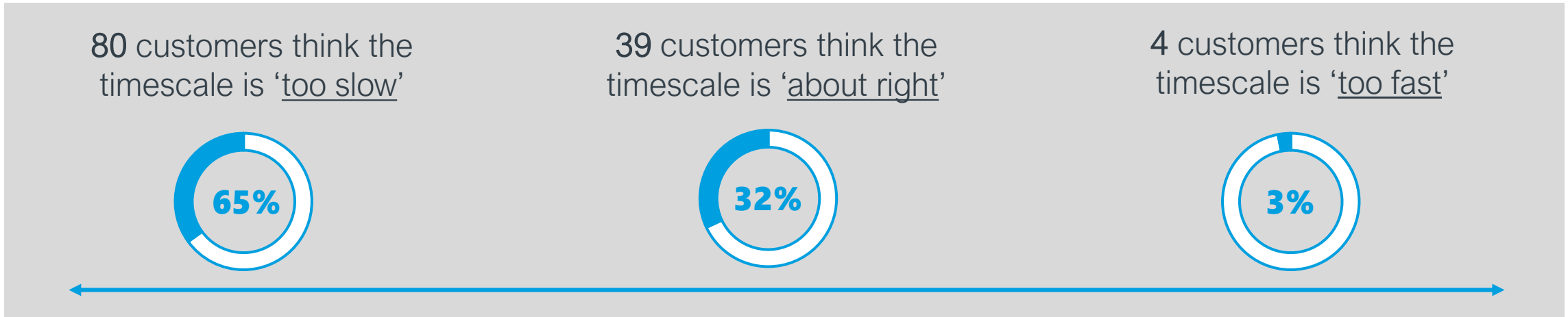
In their own words

I would expect any employer not to discriminate by pay or employment criteria/recruitment - and Thames Water is no exception. For such a large company it must be possible to make reasonable adjustments to employ disabled people. Why wait until 2050 to implement changes?
Female, 55-65, ABC1, White, Dual, Slough/ Wycombe/ Aylesbury

I think Thames are aware of the problem and although they are falling short they are making good efforts to correct it.
Female, 35-44, C2DE, White, Sutton & East Surrey Water

5% variance in pay between men and women compared to other companies is not acceptable.
Male, 35-44, ABC1, White, Dual, London

For many, the timescale for creating attractive jobs locally is 'too slow', yet a sizeable amount believe it is 'about right'



What do customers think about the goal overall?

- The goal is supported by most customers who believe this is a worthwhile and realistic plan to achieve.
- Many question why this plan would take that long.

What do customers think of Thames Water's plan?

- Most feel this is sensible for Thames Water to be involved in and many are surprised this is not a plan Thames Water had already in place.
- For the majority the 2050 goal is too far away. Many believe this goal should be addressed more urgently.

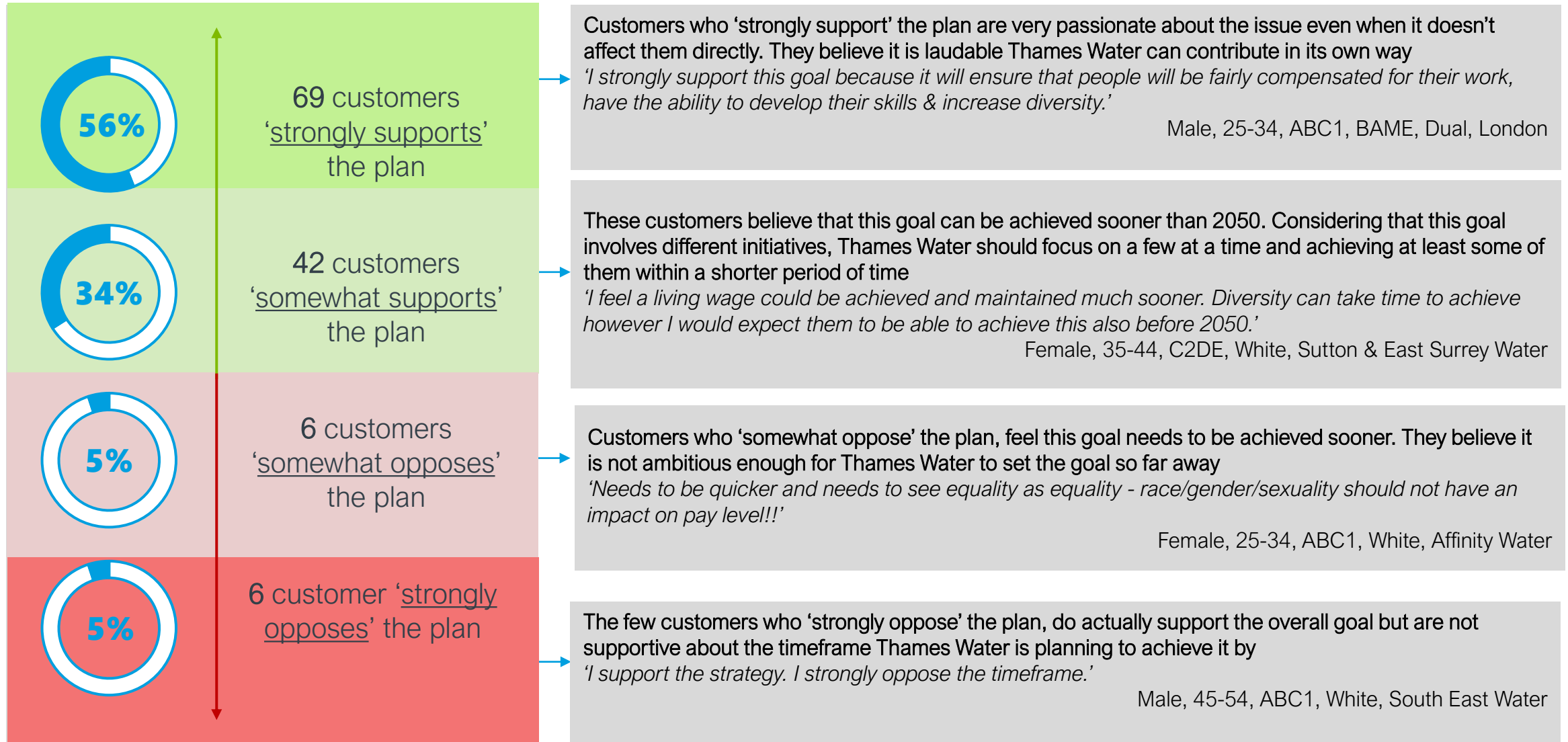
In their own words

I think all of the plans are commendable, however, being my age, I am finding it hard to change with the times regarding gender discrimination, etc. I think issues such as equal pay should be addressed now... why wait until 2050?!
Male, 45-54, ABC1, 10-49 employees, Non-water reliant, Business Customer

I am surprised that TW do not already have diversity plan in place. This should be addressed in the next 12 months.
Male, 65+, ABC1, White, South East Water

The goal should be achieved much sooner - setting a goal to give everyone a living wage that is 28 years away is dreadful. Everyone should have a living wage now
Male, 45-54, ABC1, White, Vulnerable, Sutton & East Surrey Water

Creating attractive jobs for people in our communities is strongly supported by more than half of customers



Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit

Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit

What is this about?

- Thames Water owns land, mainly around its water and sewage works, and this could be used to benefit local communities more.

Where are Thames Water now

- Thames Water has opened up **some** of its land for recreation, such as nature reserves, wetlands and reservoirs near its water and sewage works. Some local projects for nature conservation are also supported.

How do Thames Water compare to other water companies?

- Most other water companies in the country open some of their land (reservoirs and other sites) for recreation.

Where do Thames Water want to be by 2050

- **More** of Thames Water's land (that isn't required for its operations) will be used to benefit local communities.

This is from the theme of COMMUNITIES IMPACT: *Thames Water is a force for good in communities by eliminating water poverty, providing jobs & skills and developing the land around its buildings & works responsibly*

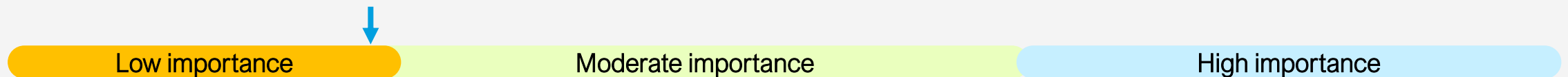
How Thames Water can improve by 2050

- More of Thames Water's land could be used for recreation and for improving the natural diversity of local wildlife and nature.

Customers have mixed views on using Thames Water land for wildlife and recreation, but most see it as a 'nice-to-have'

Summary overview:

Customers show mixed levels of interest in this area. Although some are keen for more wild spaces to improve local areas and provide safe spaces for families, others feel it has a lower priority and, given the utility bills crisis, wouldn't be the right area to invest in currently.



What's important/unimportant?

- The element of climate change runs through this issue for some, seeing these natural spaces as increasingly important to protect.
- Others feel that they wouldn't use the space, with some suggesting that this wouldn't likely happen in London (and so wouldn't benefit them).

How is Thames Water currently performing?

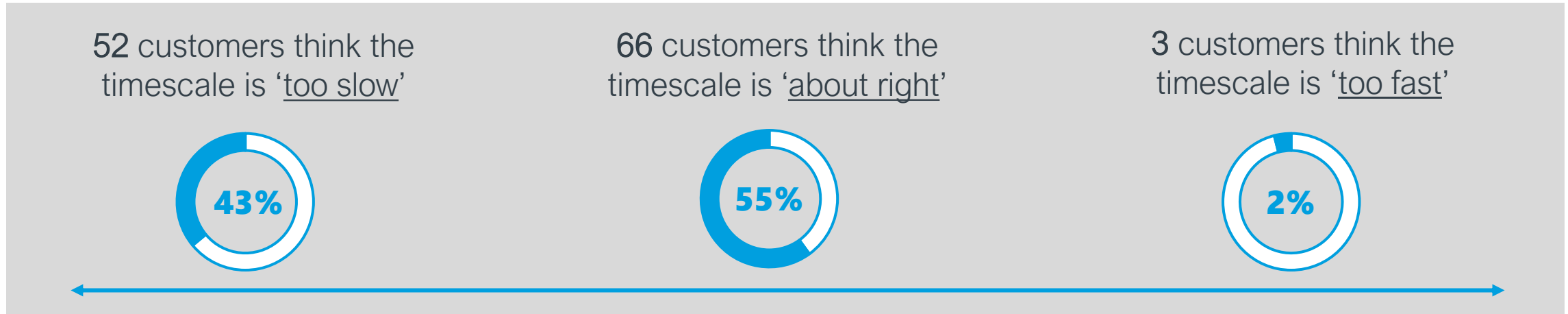
- Most customers call out the 'vague' metrics shown to them, especially how 'some' land is being repurposed.
- They'd like to know exactly how much Thames Water is repurposing, what they're doing and the outcomes.

In their own words

I think the idea of this is great but I don't recall any Thames Water locations in London. So this would only benefit people living close by but they'll already have these kind of things as they don't live in London
Female, 25-34, C2DE, BAME, Dual, London

The objective and aim is very vague, doesn't say how they will do this, there aren't any specifics. It says they have opened up some of their land, I don't know whether this is good or not or what they are doing with it.
Male, 35-44, C2DE, BAME, Dual, London

Despite previously mixed interest, customers want more details and action on using Thames Water land for wildlife and recreation



What do customers think about the goal overall?

- Despite mixed levels of interest/importance, customers tend to think the goal itself is admirable, in particular the benefit to wildlife and local communities/families.
- For many, this is a 'nice-to-have', and something they can passively support.

What do customers think of Thames Water's plan?

- Similarly, although previously customers felt this was a lower priority, the lack of specific details and 'long' timeframe means many of them feel it is 'too slow'.
- Most expect this to progress constantly in the 'background'.

In their own words

I think this would be great as it would get people out and about, it would capture wildlife, get city kids to be outside and open more outdoor spaces other than parks.

Female, 25-34, ABC1, 0-9 employees, Water reliant, Business customer

This is not a plan just a vague wish and made me disappointed and angry. People are keen on outdoors areas and activities, conservation and wildlife. This could and should have been a wonderful section full of detail and rich ideas and strategies

Female, 65+. ABC1, White, South East Water

Using Thames Water land to benefit wildlife and create natural spaces for people to visit isn't high priority, but something most support and want to see



Use the land Thames Water owns to create jobs and housing

Use the land Thames Water owns to create jobs and housing

What is this about?

- Thames Water owns land, mainly around its water and sewage works, and this could be used to benefit local communities more.

Where are Thames Water now

- This would be a new venture for Thames Water.

How do Thames Water compare to other water companies?

- Very few water companies have built new housing on their land.

Where do Thames Water want to be by 2050

- Some of Thames Water's land (that isn't required for its operations) could be used for building houses, two fifths of which would be affordable housing. This would also create new local jobs.

This is from the theme of COMMUNITIES IMPACT: *Thames Water is a force for good in communities by eliminating water poverty, providing jobs & skills and developing the land around its buildings & works responsibly*

How Thames Water can improve by 2050

- Some of Thames Water's land could be used to build around 5,000 new homes of which 2,000 would be affordable housing. This would also create local jobs.

Customers have mixed views on whether Thames Water should become involved in housing

Summary overview:

Although many customers see the need for more housing, overall opinions on this issue are mixed. Some customers show little interest in the topic, others feel the land should be used as green spaces and others are concerned around how the land would be used for housing given the need for affordable homes.



Low importance

Moderate importance

High importance

What's important/unimportant?

- Many customers are aware of the need for affordable homes, and some see this as common sense to use available land.
- However, some homeowners feel this is irrelevant to them, viewing the issue as unimportant.
- A few customers question the exact details of the scheme, feeling concerned for the quality of housing and local wildlife.

How is Thames Water currently performing?

- As this is a future idea, customers aren't able to comment on Thames Water's current performance.
- Some are excited to see where this initiative goes, however.

In their own words

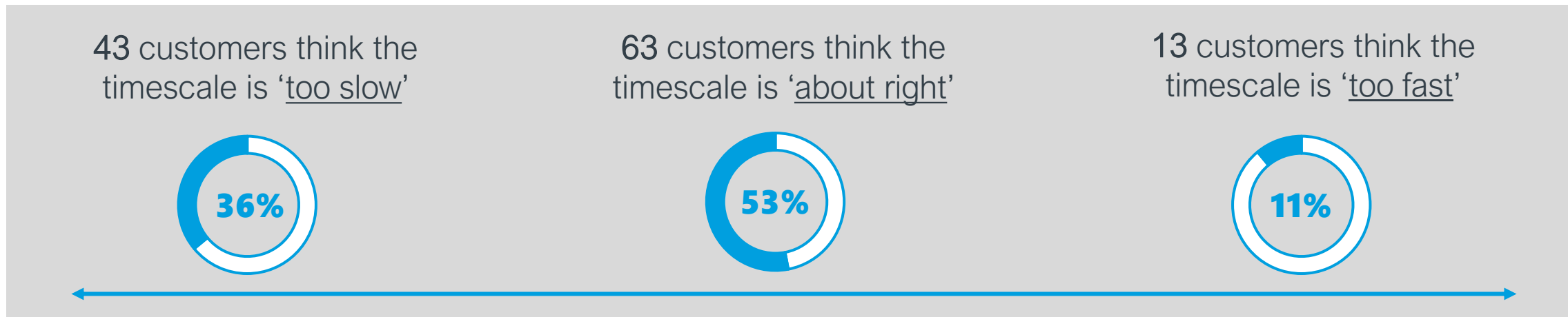
This would be a great opportunity for those who want to buy affordable houses and also help the community with work. But as somebody who has a home I don't see how this would benefit me so it isn't as important.

Male, 18-24, C2DE, BAME, Future customer

I think that they aren't doing much just like other companies but I think it is good that they are taking a step and doing something about it.

Female, 18-24, ABC1, BAME, Dual, Future customer

For most, the timescale for using Thames Water land for housing is 'about right', although a sizeable minority feel the pace is too slow due to the wider housing crisis



What do customers think about the goal overall?

- Customers are mixed on whether this is a space for Thames Water to play a role.
- Some see this as common sense with the available land, others see more pressing issues for Thames Water.

What do customers think of Thames Water's plan?

- A few customers would like to see more details, especially around the types of jobs being created (and the longevity of them) alongside the types of houses being built.

In their own words

Not sure this can be achieved in the timescale because it's a lot. I feel that the water concerns should be concentrated on 1st and the building of houses can follow after, unless they have a plan to get it all done in a timely manner.

Female, 45-54, ABC1, BAME, Dual, London

More details surrounding job creation and the longevity of these jobs is needed to understand the lasting impact. More of the housing should be affordable, otherwise it stands to become another project that is promised to help people with housing that only stands to benefit those affluent enough to purchase property.

Female, 18-24, ABC1, White, Dual, London

Using Thames Water land to create jobs and housing is strongly supported by most customers, although a sizeable minority are against this due to concerns around Thames Water's remit and protecting natural spaces

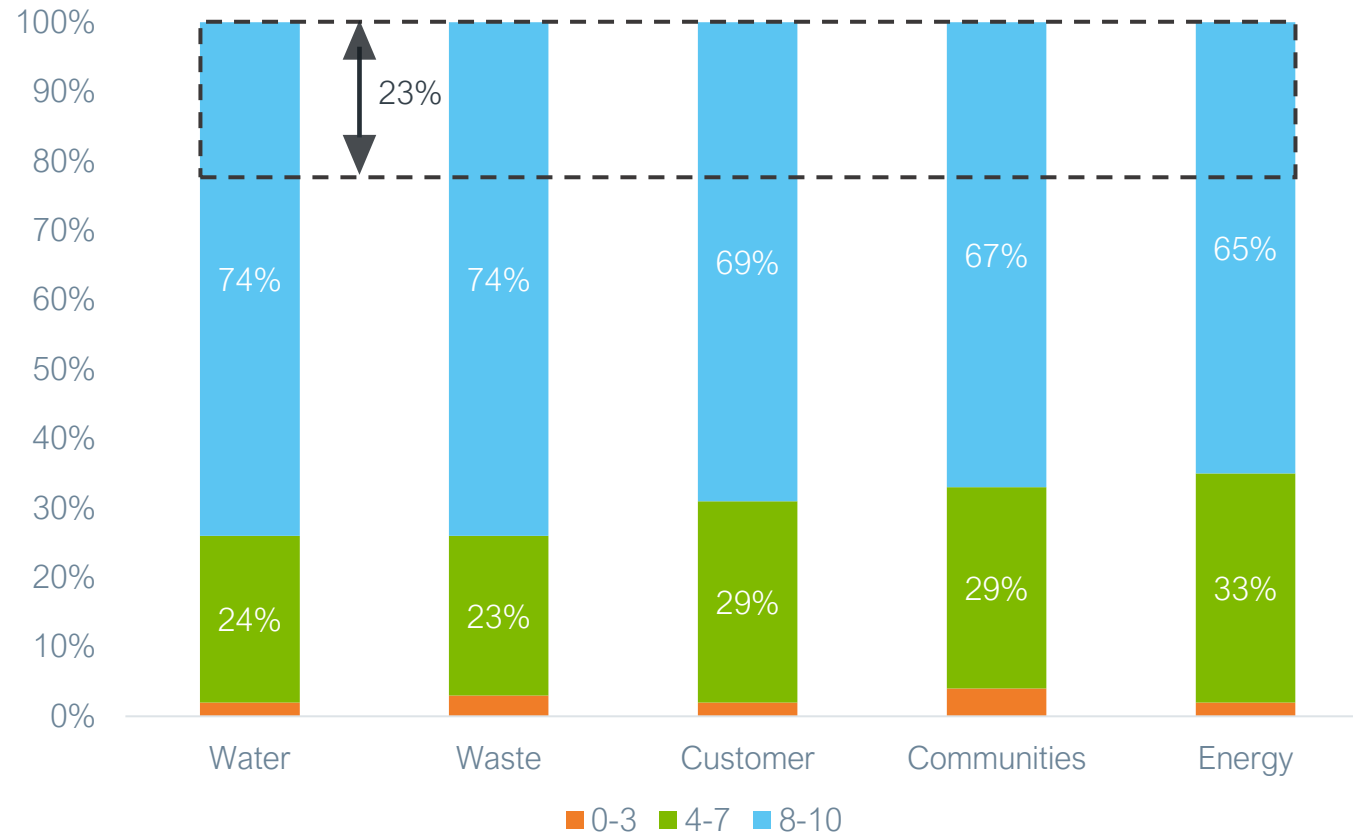




Quantitative findings: overall 'importance'
and 'urgency for improvement' ratings
for all Vision 2050 goals

Approaching a quarter (23%) of uninformed household customers ranked *all 5 areas* covered by Vision 2050 as '10', of utmost importance

What is important to you across the five specific areas of Thames Water's activity?

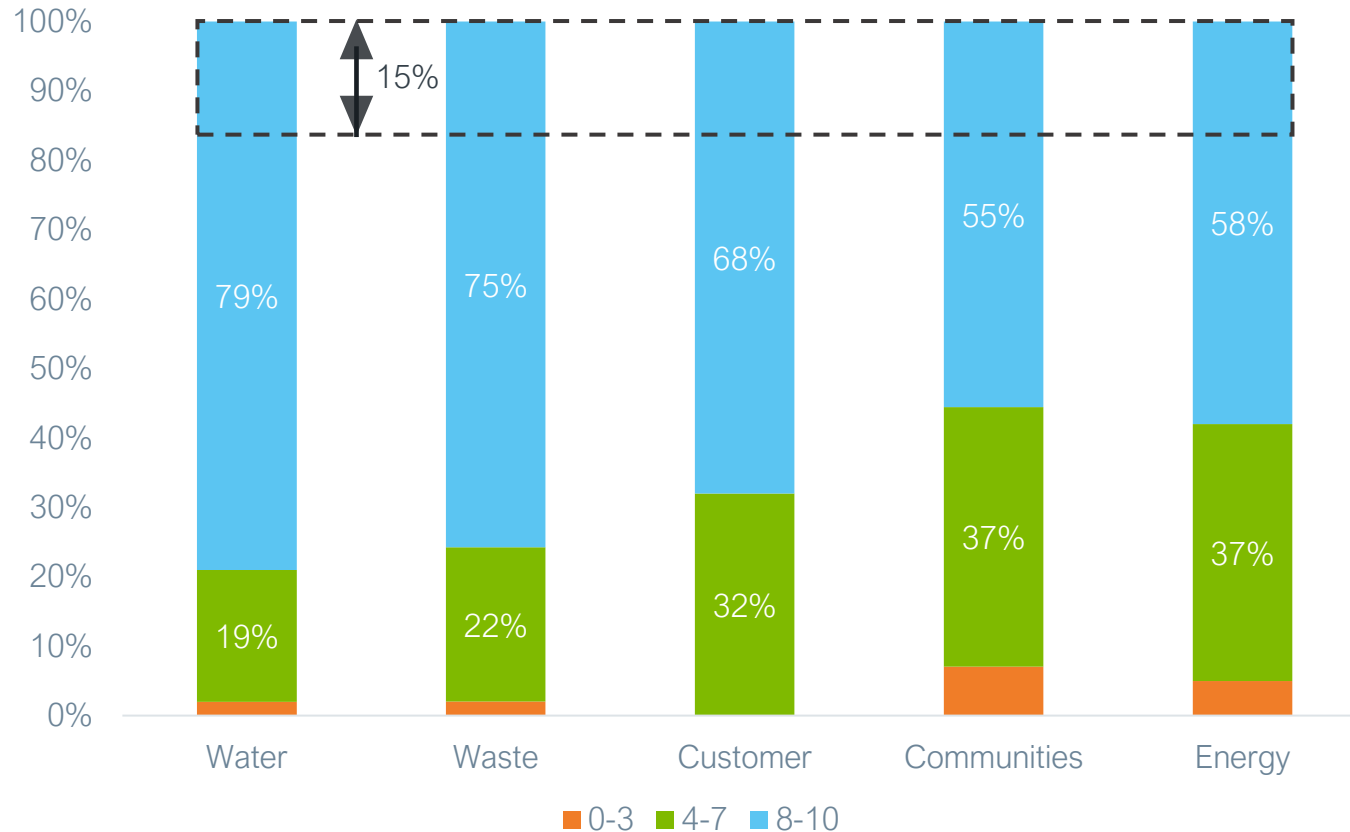


Key to descriptions

- Water:** Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies
- Waste and rivers:** Prevent all sewer flooding and wastewater pollution (when untreated wastewater spills into properties and rivers) and lead the effort to restore the quality of rivers and streams
- Customers:** Deliver great customer service and value for money
- Energy:** Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in) and maximise the green energy produced for ourselves and for local communities
- Impact on communities:** Thames Water is a force for good in communities by eliminating water poverty (so all customers can afford to pay water bills), providing jobs and skills and developing the land around its buildings and works responsibly

This drops to 15% of uninformed non-household customers ranking 5 areas as '10'

What is important to you across the five specific areas of Thames Water's activity?

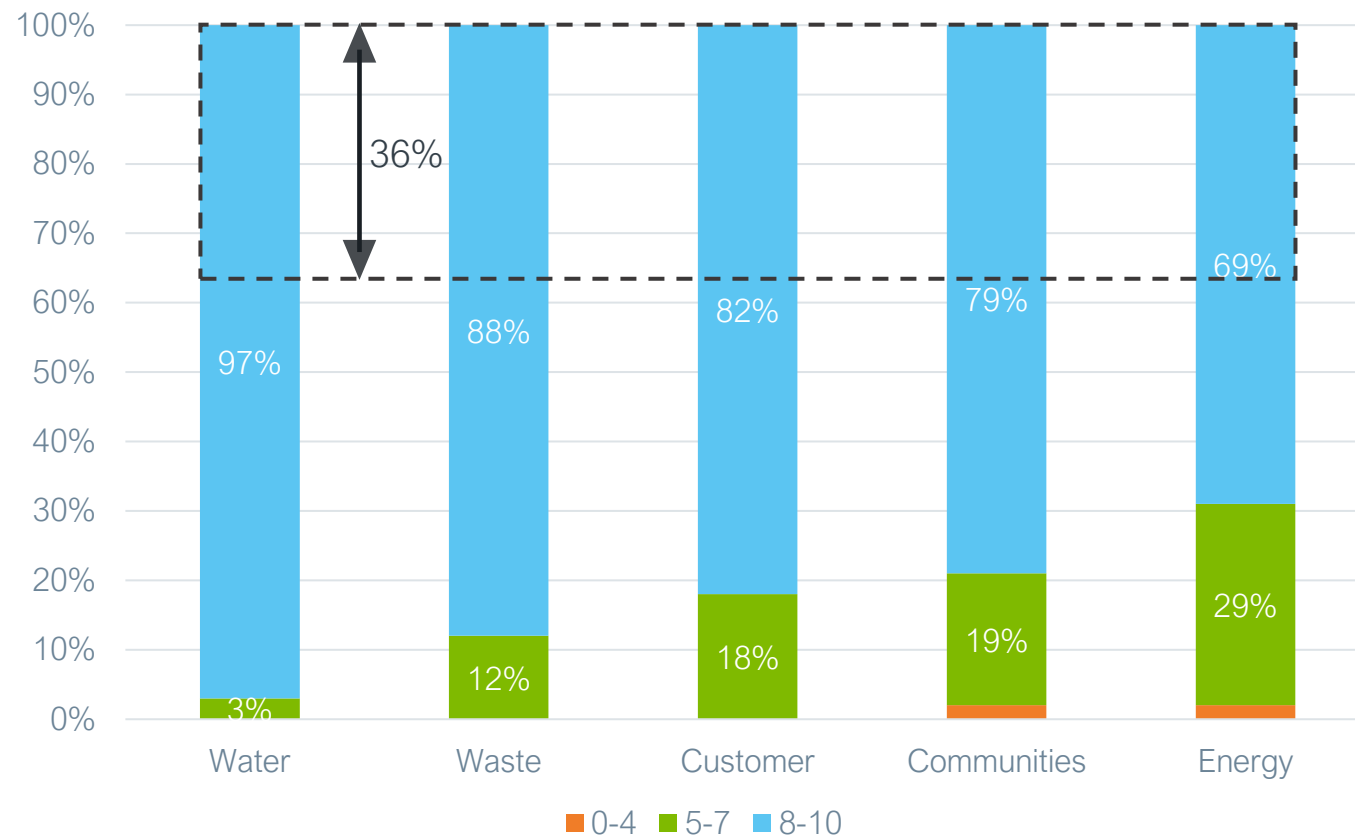


Key to descriptions

- 1. Water:** Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies
- 2. Waste and rivers:** Prevent all sewer flooding and wastewater pollution (when untreated wastewater spills into properties and rivers) and lead the effort to restore the quality of rivers and streams
- 3. Customers:** Deliver great customer service and value for money
- 4. Energy:** Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in) and maximise the green energy produced for ourselves and for local communities
- 5. Impact on communities:** Thames Water is a force for good in communities by eliminating water poverty (so all customers can afford to pay water bills), providing jobs and skills and developing the land around its buildings and works responsibly

Among all informed customers, higher importance figures were given across the board

36% of customers ranked *all 5 areas* as '10', of utmost importance



Key to descriptions

1. **Water:** Ensure there is enough water and develop a future-proof water network that avoids leaks and interruptions to customers' water supplies
2. **Waste and rivers:** Prevent all sewer flooding and wastewater pollution (when untreated wastewater spills into properties and rivers) and lead the effort to restore the quality of rivers and streams
3. **Customers:** Deliver great customer service and value for money
4. **Energy:** Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in) and maximise the green energy produced for ourselves and for local communities
5. **Impact on communities:** Thames Water is a force for good in communities by eliminating water poverty (so all customers can afford to pay water bills), providing jobs and skills and developing the land around its buildings and works responsibly

Water and Waste Vision 2050 goals tend to be rated as more important and more urgent for improvement; at the same time, all goals can be deemed important

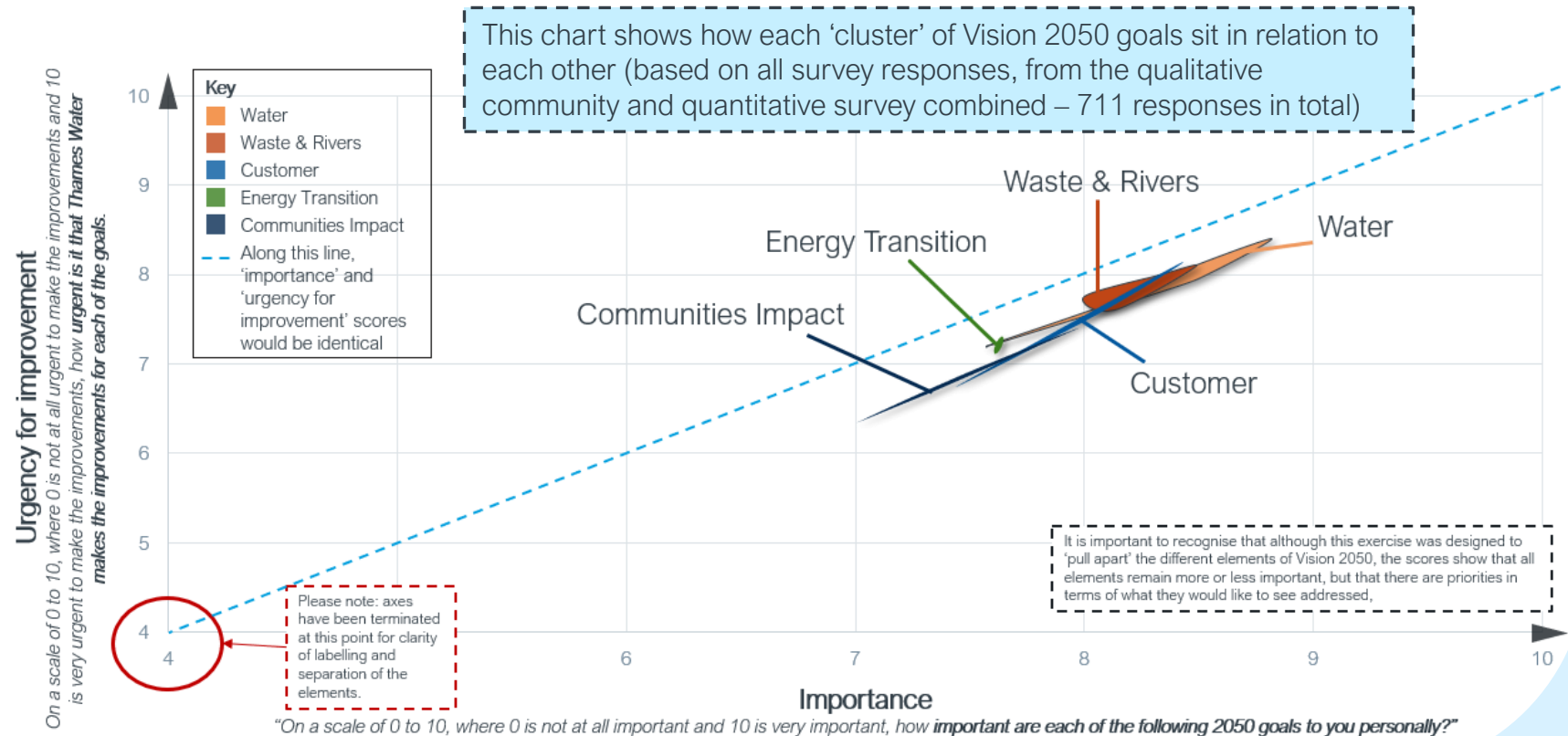
Mapping Vision 2050 priorities; personal importance vs urgency for improvement (All informed qual and uninformed quant responses - 711)



Quantitative data shows a relatively clear prioritisation of Vision 2050 goals

'Water' and 'Waste & Rivers' are both broadly of highest priority in both importance and urgency for improvement

- Looking at importance and urgency for improvement for each goal, it is clear that all of the proposed goals are deemed both important and relatively urgent to improve by customers
 - All goals fall within the range 7.0 to 9.0 in terms of importance (out of 10 overall)
 - All goals fall within the range 6.0 to 8.5 in terms of urgency for improvement(out of 10 overall)
- Of all the goals, there is a clear pattern where **'Water'** and **'Waste & Rivers'** goal clusters tend to be more highly prioritised than others, with the exception of 'Keep bills affordable' and 'Fix service issues same day' (both **'Customer'**)
- It is important to note that these are relative differences only; all of the Vision goals are deemed important overall as highlighted above



Water and Waste Vision 2050 goals tend to be rated as more important and more urgent for improvement; at the same time, all goals can be deemed important

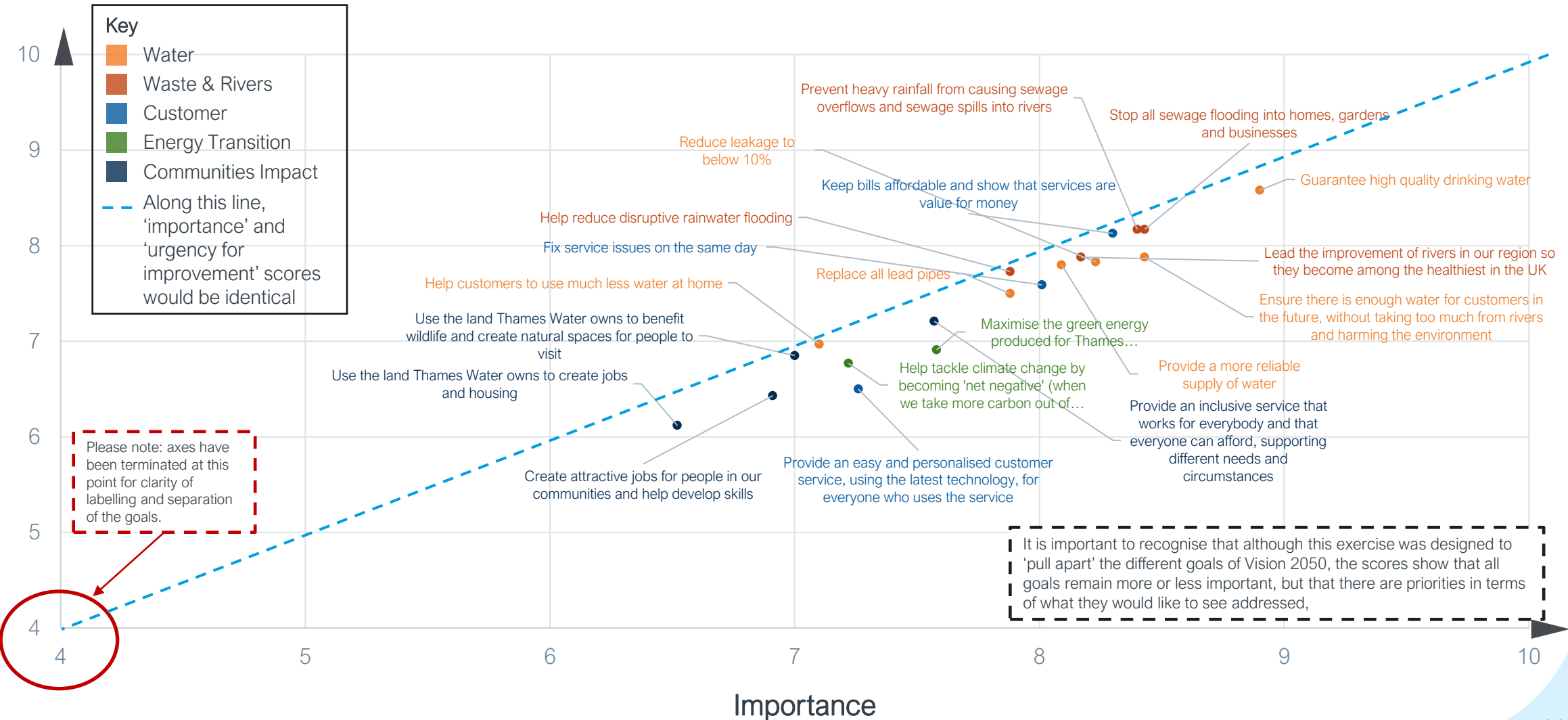
Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Uninformed HH quant - 500)



For NHH customers, the pattern of priorities is largely similar to that of HH customers

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Uninformed NHH quant - 100)

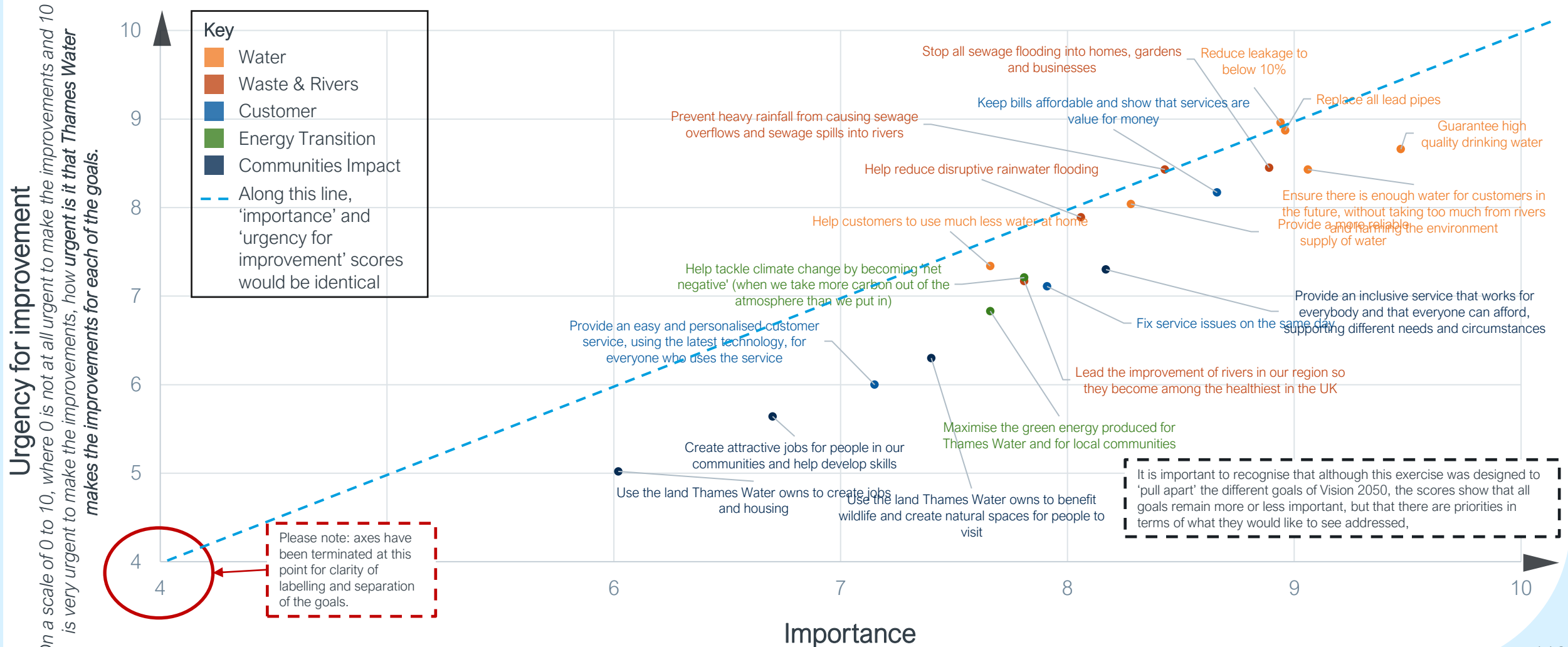
Urgency for improvement
On a scale of 0 to 10, where 0 is not at all urgent to make the improvements and 10 is very urgent to make the improvements, how urgent is it that Thames Water makes the improvements for each of the goals.



"On a scale of 0 to 10, where 0 is not at all important and 10 is very important, how important are each of the following 2050 goals to you personally?"

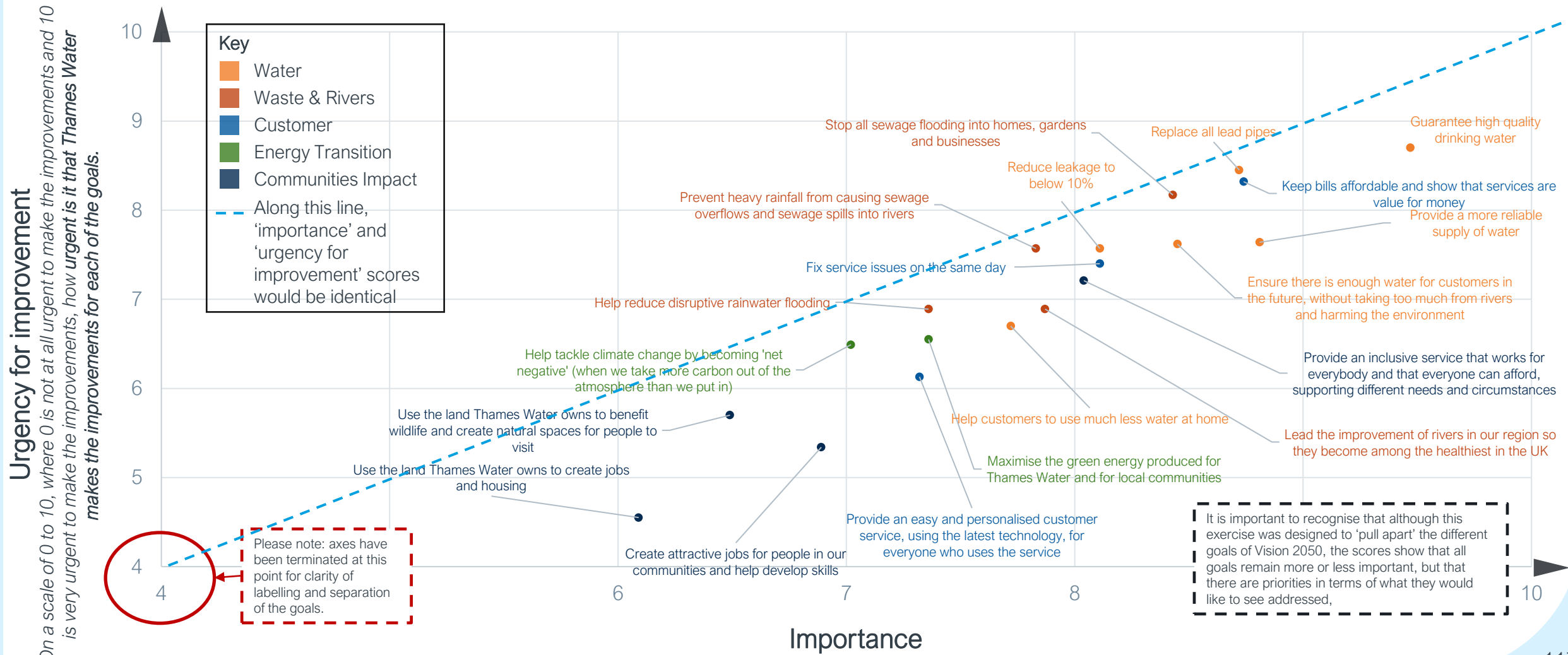
Among the 'informed' community participants, the range of scores is more varied and there are larger gaps between perceptions of importance and urgency

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Informed panel – 50)



It is a similar story in the responses from the 'uninformed' community participants with wide-ranging scores and larger importance-urgency gaps

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Informed fresh – 49, includes business and future bill payer customers)

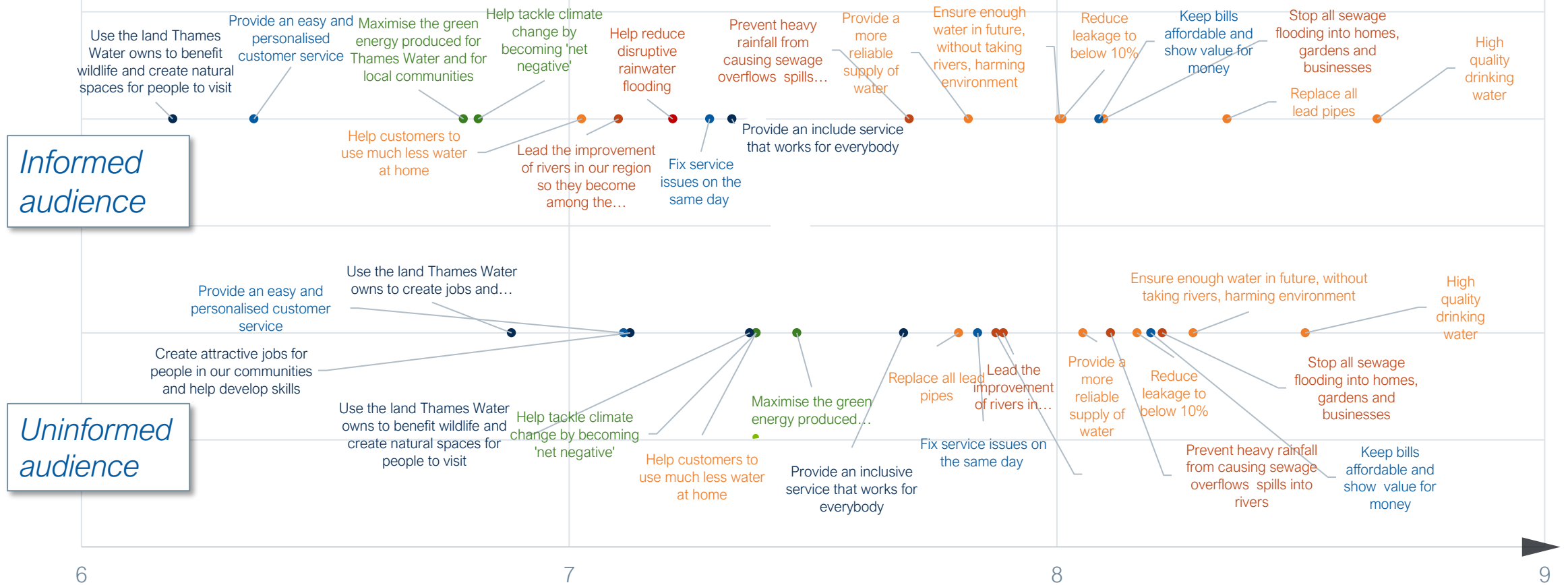


"On a scale of 0 to 10, where 0 is not at all important and 10 is very important, how important are each of the following 2050 goals to you personally?"

A different priority hierarchy is evident between informed and uninformed audiences

The chart below shows a 'hybrid' score, the mean of the combined importance and urgency to improve scores. This allows us to plot both informed and uninformed scores along the same axis to show the broad priority hierarchy and spread of scores overall.

Here we can see that informed audiences give a greater range of scores, suggesting that additional information provided (e.g. details of the hazards of lead pipes) has led to a much more pronounced distribution of scores up and down the scale.



Mean of importance and urgency scores combined: informed qual (99) vs uninformed quant (600)

“On a scale of 0 to 10, where 0 is not at all important and 10 is very important, how important are each of the following 2050 goals to you personally?” and On a scale of 0 to 10, where 0 is not at all urgent to make the improvements and 10 is very urgent to make the improvements, how urgent is it that Thames Water makes the improvements for each of the goals.

Considering the different views of informed and uninformed audiences

- The combination importance/urgency mean score serves to display the hierarchy of priority (and reflects hierarchies of both scores relatively well). It is used here as a convenient mechanic to provide a simpler comparison between informed and uninformed audiences
- It is clear that informed customers display a greater diversity of scores (both above and below the range of uninformed scores)
- There are a number of potential reasons for this:
 - Informed customers by definition had been provided with significantly more information than uninformed customers upon which to base their decisions (see separate document for a full set of stimulus used with each audience)
 - Informed customers were asked *more* questions, so had a greater opportunity to consider the goals from different angles
 - Informed customers were likely to have spent more time considering the issues and selecting a response
 - ...as a result of the above it may be natural that they are able to put 'more space' between the goals in terms of importance and priority
- Another more practical reason for this might be that the smaller sample size involved with the informed audience means that any outliers will have had a more proportionate impact, hence uninformed scores being closer together

'Informed' community participants, importance and urgency vs goal achievement by 2050

Goals in yellow indicate that a majority of customers feel the goals are 'too slow' if they are to be achieved by 2050. A mix of goals that are considered urgent or considered quick to achieve. Informed panel (50)

Urgency for improvement
On a scale of 0 to 10, where 0 is not at all urgent to make the improvements and 10 is very urgent to make the improvements, how urgent is it that Thames Water makes the improvements for each of the goals.

Low/med/high labels indicate the difference in percentage of people that think the goals are 'too slow' if they are to be achieved by 2050, compared to those that think they are 'just right'.
 LOW = Up to 10% more think they are too 'slow' than 'just right'
 MED = 11-30% more think they are too 'slow' than 'just right'
 HIGH = 30%+ difference – over 30% more customers think the goal is too slow compared to those that think it is 'about right'



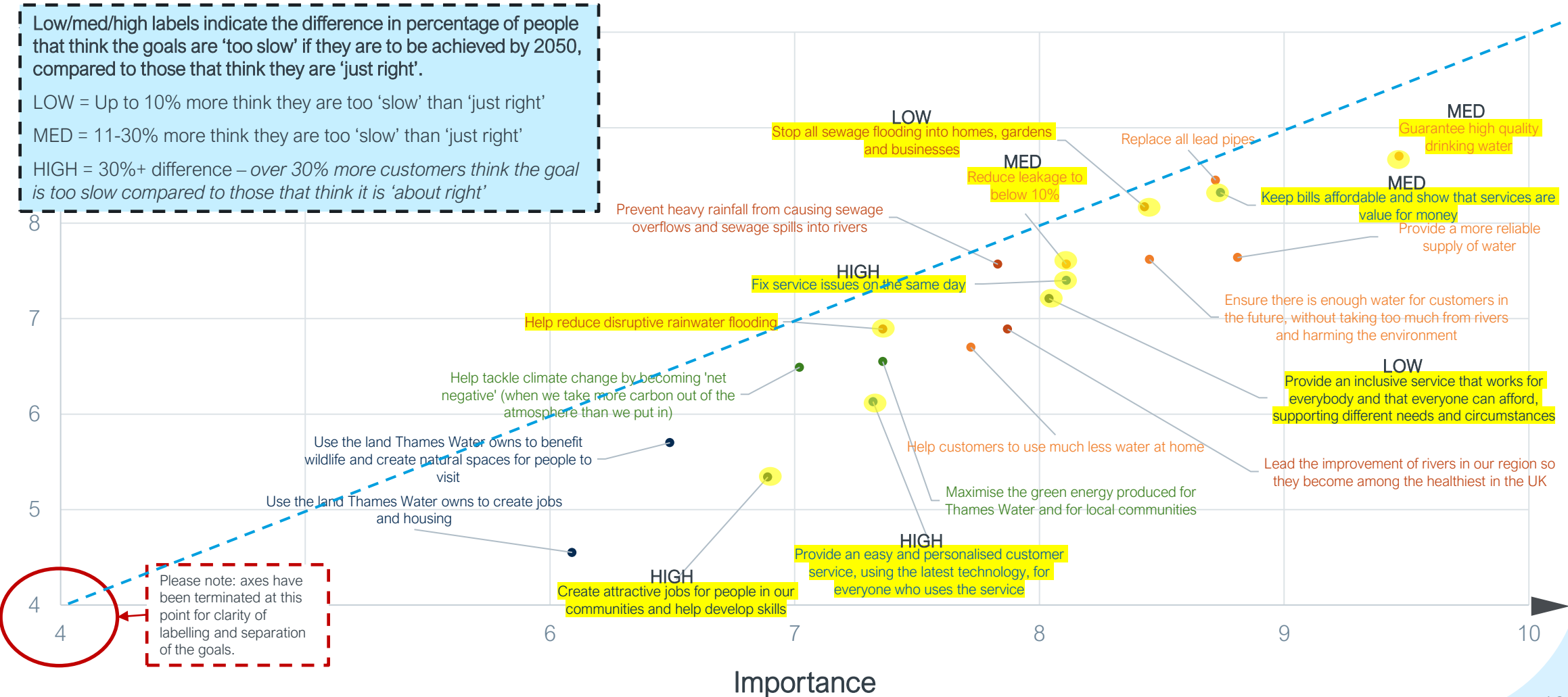
"On a scale of 0 to 10, where 0 is not at all important and 10 is very important, how important are each of the following 2050 goals to you personally?"

'Fresh' community participants, importance and urgency vs goal achievement by 2050

Goals in yellow indicate that a majority of customers feel the goals are 'too slow' if they are to be achieved by 2050. A mix of goals that are considered urgent or considered quick to achieve. Fresh panel (49)

On a scale of 0 to 10, where 0 is not at all urgent to make the improvements and 10 is very urgent to make the improvements, how urgent is it that Thames Water makes the improvements for each of the goals.

Low/med/high labels indicate the difference in percentage of people that think the goals are 'too slow' if they are to be achieved by 2050, compared to those that think they are 'just right'.
 LOW = Up to 10% more think they are too 'slow' than 'just right'
 MED = 11-30% more think they are too 'slow' than 'just right'
 HIGH = 30%+ difference – over 30% more customers think the goal is too slow compared to those that think it is 'about right'

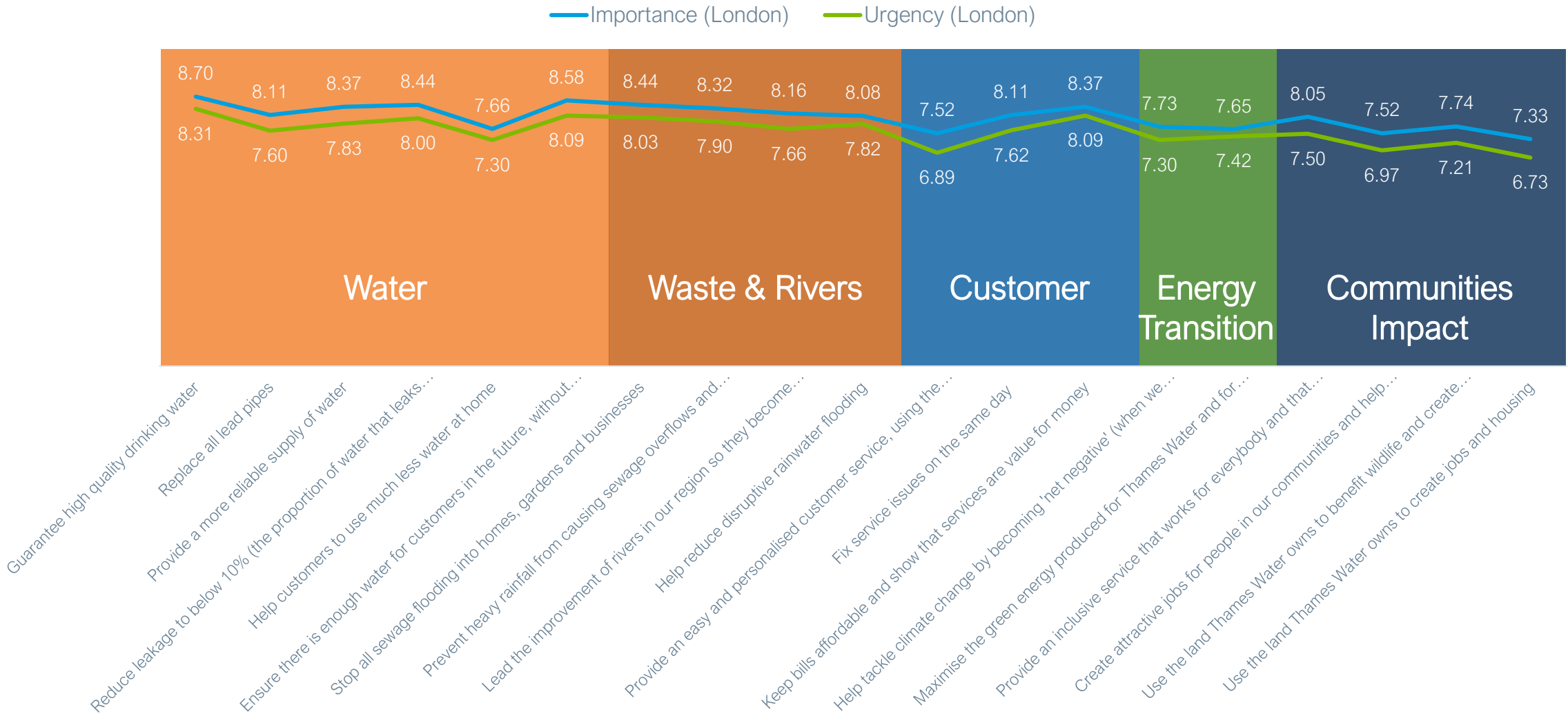


Please note: axes have been terminated at this point for clarity of labelling and separation of the goals.

"On a scale of 0 to 10, where 0 is not at all important and 10 is very important, how important are each of the following 2050 goals to you personally?"

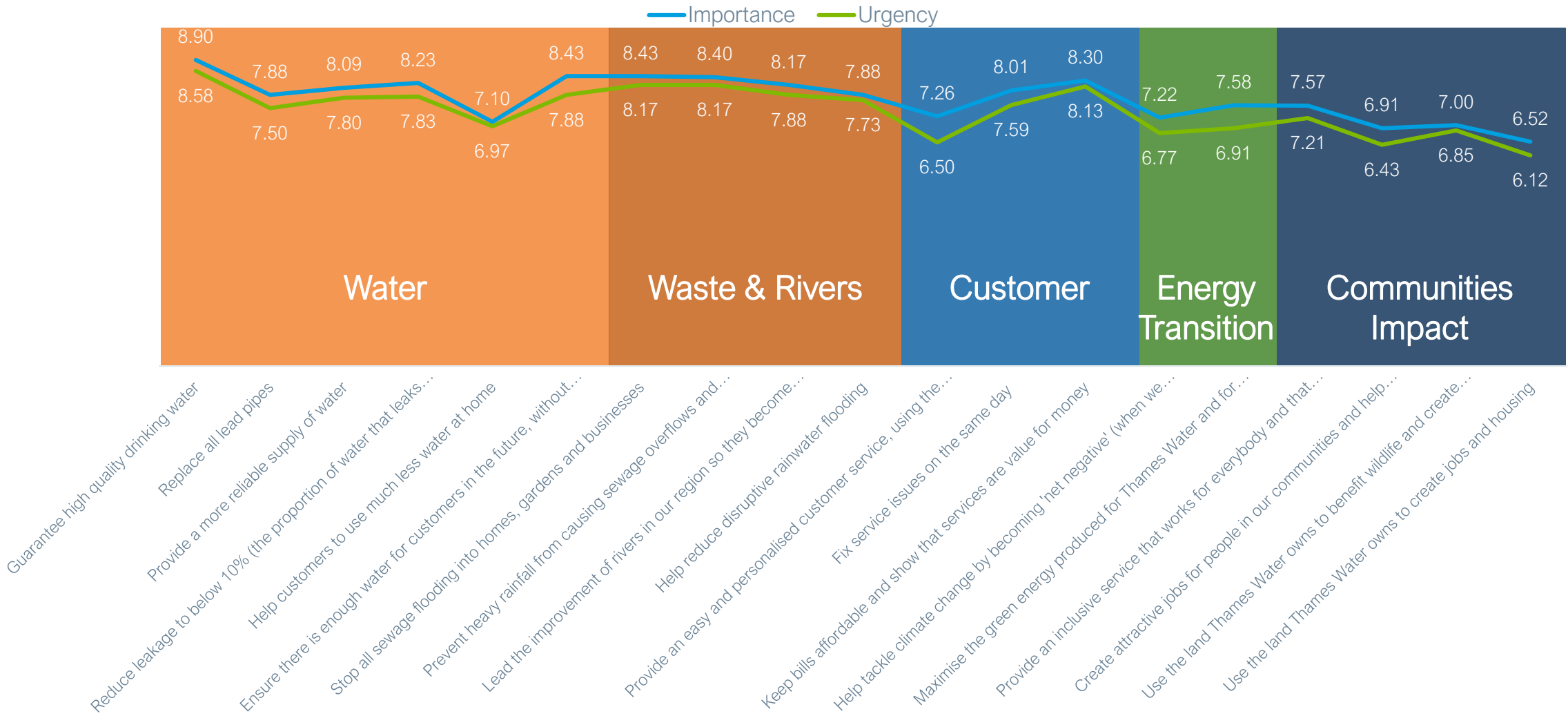
Each of the goals are largely correlated in terms of their relative importance and urgency

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (uninformed HH customers - 500)



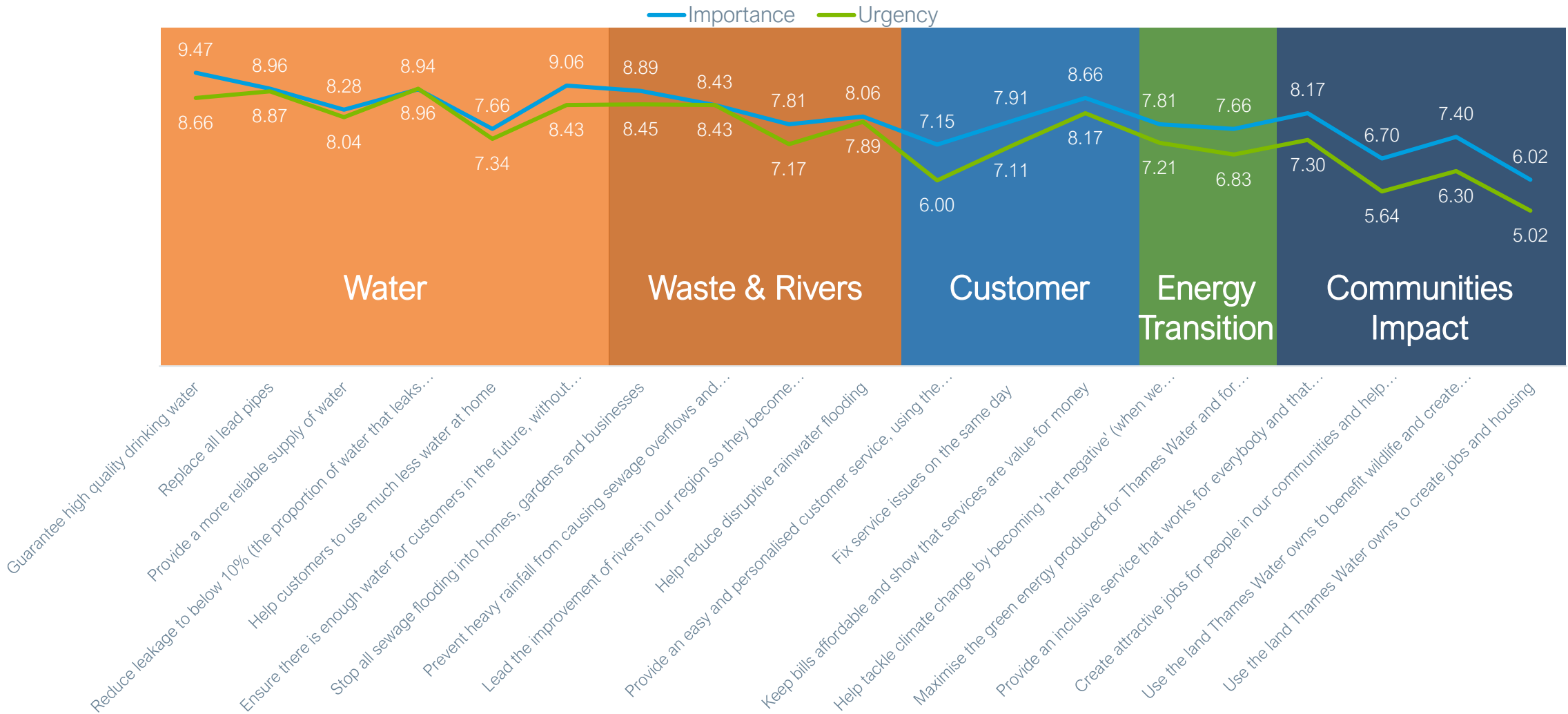
Each of the goals are largely correlated in terms of their relative importance and urgency

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (uninformed NHH quant - 100)



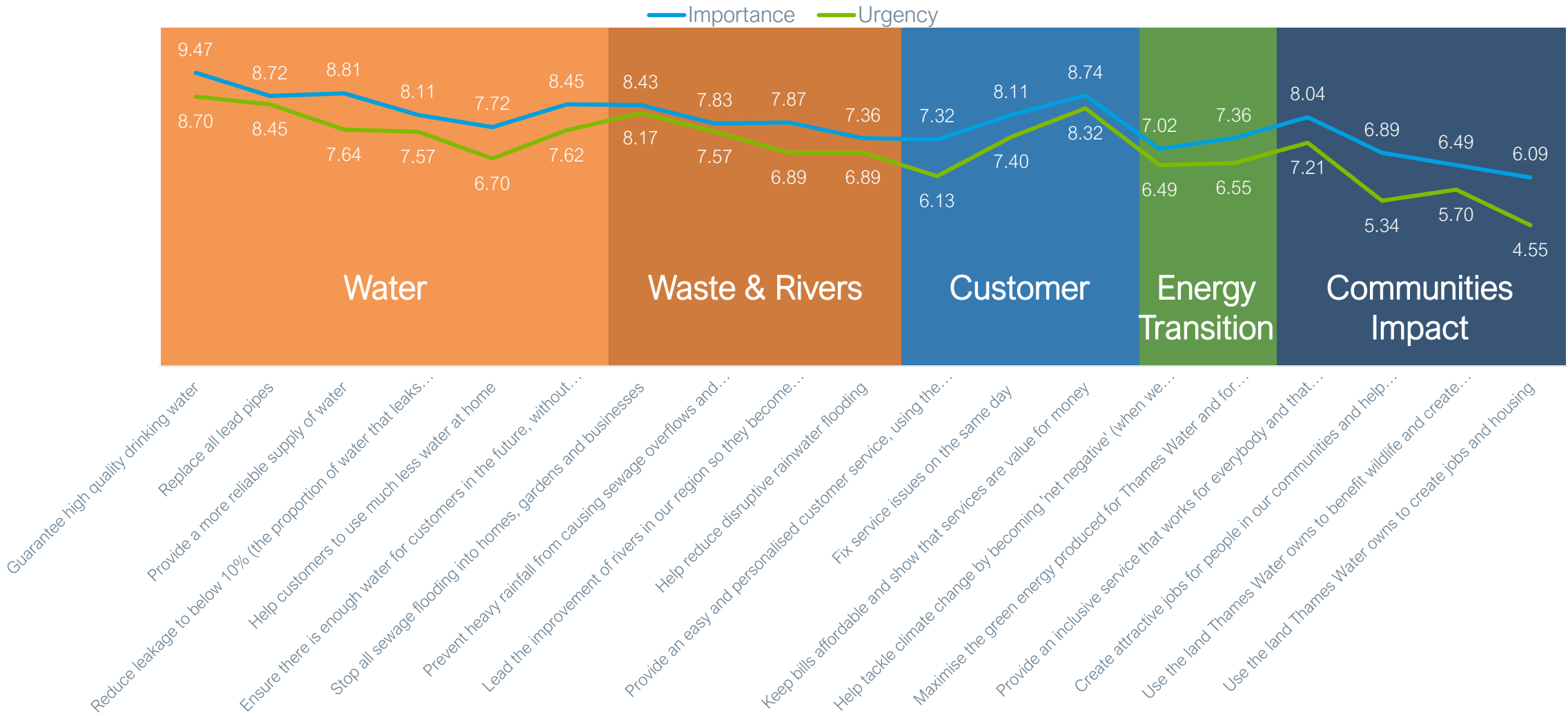
Each of the goals are largely correlated in terms of their relative importance and urgency

Informed panellists see importance and urgency as closely correlated, particularly for water and waste & rivers (base: 50)



Each of the goals are largely correlated in terms of their relative importance and urgency

Informed fresh customers show greater divergence between importance / urgency for improvement (base: 49)



For all goals and categories, urgency for improvement scores are *lower* than overall importance

- One potential interpretation of this is that there are no goals that customers see as in dire need of improvement (i.e. performance is so poor that, regardless of importance, urgency for improvement is disproportionately high)
- Another interpretation is simply that customers want action taken on goals in accordance with the level of importance they place on them, which is not an unusual position to take
- However, the *size* of the gap between importance and urgency for improvement varies between 0.25 and 0.71 overall across the goals. While this is not a major variation, it tends to follow the overall pattern of importance/urgency, in which ‘*Water*’ and ‘*Waste & Rivers*’ show the smallest gap between importance and urgency for improvement (broadly speaking). ‘*Environment*’ also has smaller gaps. This may suggest:

- Customers simply want Thames Water to focus on core service delivery and ensuring sewage does not impact upon homes and the environment in any way (true ‘hygiene’ factors)
- While many of the as yet un-started projects (e.g. building houses) are deemed important, they are less urgent than ensuring water, waste and environment factors are taken care of

Difference of under 0.5

Difference of over 0.5

Goals	Importance	Urgency	Difference
Help reduce disruptive rainwater flooding	7.99	7.74	0.25
Keep bills affordable and show that services are value for money	8.41	8.09	0.32
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.31	7.97	0.34
Stop all sewage flooding into homes, gardens and businesses	8.47	8.09	0.38
Help customers to use much less water at home	7.58	7.19	0.39
Reduce leakage to below 10%	8.42	8.02	0.40
Maximise the green energy produced for Thames Water and for local communities	7.63	7.22	0.41
Guarantee high quality drinking water	8.83	8.4	0.43
Replace all lead pipes	8.18	7.73	0.45
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.62	7.15	0.47
Lead the improvement of rivers in our region so they become among the healthiest in the UK	8.11	7.59	0.52
Fix service issues on the same day	8.06	7.54	0.52
Provide a more reliable supply of water	8.35	7.82	0.53
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.57	8.02	0.55
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.52	6.96	0.56
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	7.99	7.42	0.57
Create attractive jobs for people in our communities and help develop skills	7.34	6.69	0.65
Use the land Thames Water owns to create jobs and housing	7.01	6.33	0.68
Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service	7.43	6.72	0.71

The importance-urgency gap varies by goal

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (All informed qual and uninformed quant - 711)

Vision 2050 goal	Importance	Urgency	Difference
Provide an easy and personal customer service, using the latest technology for everyone who uses the service	7.43	6.72	0.71
Use the land Thames Water owns to create jobs and housing	7.01	6.33	0.68
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	7.99	7.42	0.57
Create attractive jobs for people in our communities and help develop skills	7.34	6.69	0.65
Provide a more reliable supply of water	8.35	7.82	0.53
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.52	6.96	0.56
Lead the improvement of rivers in our region so they become among the healthiest in the UK	8.11	7.59	0.52
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.57	8.02	0.55
Fix service issues on the same day	8.06	7.54	0.52
Reduce leakage to below 10%	8.42	8.02	0.40
Replace all lead pipes	8.18	7.73	0.45
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.62	7.15	0.47
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.31	7.97	0.34
Stop all sewage flooding into homes, gardens and businesses	8.47	8.09	0.38
Guarantee high quality drinking water	8.83	8.40	0.43
Help customers to use much less water	7.58	7.19	0.39
Keep bills affordable and show that services are value for money	8.41	8.09	0.32
Help reduce disruptive rainwater flooding	7.99	7.74	0.25
Maximise the green energy produced for Thames Water and for local communities	7.63	7.22	0.41

Ranked by difference in Importance and Urgency scores

Difference:
 >/=0.5
 <0.5

The importance-urgency gap varies by goal

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Uninformed HH - 500)

Vision 2050 goal	Importance	Urgency	Difference
Provide an easy and personal customer service, using the latest technology for everyone who uses the service	7.52	6.89	0.63
Use the land Thames Water owns to create jobs and housing	7.33	6.73	0.60
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	8.05	7.50	0.55
Create attractive jobs for people in our communities and help develop skills	7.52	6.97	0.55
Provide a more reliable supply of water	8.37	7.83	0.54
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.74	7.21	0.53
Replace all lead pipes	8.11	7.60	0.51
Lead the improvement of rivers in our region so they become among the healthiest in the UK	8.16	7.66	0.50
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.58	8.09	0.49
Fix service issues on the same day	8.11	7.62	0.49
Reduce leakage to below 10%	8.44	8.00	0.44
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.73	7.30	0.43
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.32	7.90	0.42
Stop all sewage flooding into homes, gardens and businesses	8.44	8.03	0.41
Guarantee high quality drinking water	8.70	8.31	0.39
Help customers to use much less water	7.66	7.30	0.36
Keep bills affordable and show that services are value for money	8.37	8.09	0.28
Help reduce disruptive rainwater flooding	8.08	7.82	0.26
Maximise the green energy produced for Thames Water and for local communities	7.65	7.42	0.23

Ranked by difference in Importance and Urgency scores

Difference:

≥ 0.5

< 0.5

The importance-urgency gap varies by goal

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Uninformed NHH - 100)

Vision 2050 goal	Importance	Urgency	Difference	Ranked by difference in Importance and Urgency scores
Provide an easy and personal customer service, using the latest technology for everyone who uses the service	7.26	6.50	0.76	
Maximise the green energy produced for Thames Water and for local communities	7.58	6.91	0.67	
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.43	7.88	0.55	
Create attractive jobs for people in our communities and help develop skills	6.91	6.43	0.48	
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.22	6.77	0.45	
Fix service issues on the same day	8.01	7.59	0.42	
Reduce leakage to below 10%	8.23	7.83	0.40	
Use the land Thames Water owns to create jobs and housing	6.52	6.12	0.40	
Replace all lead pipes	7.88	7.50	0.38	
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	7.57	7.21	0.36	
Guarantee high quality drinking water	8.90	8.58	0.32	
Provide a more reliable supply of water	8.09	7.80	0.29	
Lead the improvement of rivers in our region so they become among the healthiest in the UK	8.17	7.88	0.29	
Stop all sewage flooding into homes, gardens and businesses	8.43	8.17	0.26	
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.40	8.17	0.23	
Keep bills affordable and show that services are value for money	8.30	8.13	0.17	
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.00	6.85	0.15	
Help reduce disruptive rainwater flooding	7.88	7.73	0.15	
Help customers to use much less water	7.10	6.97	0.13	

Difference:

≥ 0.5

< 0.5

The importance-urgency gap varies by goal

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Informed panel - 50)

Vision 2050 goal	Importance	Urgency	Difference
Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service	7.15	6	1.15
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.4	6.3	1.1
Create attractive jobs for people in our communities and help develop skills	6.7	5.64	1.06
Use the land Thames Water owns to create jobs and housing	6.02	5.02	1
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	8.17	7.3	0.87
Maximise the green energy produced for Thames Water and for local communities	7.66	6.83	0.83
Guarantee high quality drinking water	9.47	8.66	0.81
Fix service issues on the same day	7.91	7.11	0.8
Lead the improvement of rivers in our region so they become among the healthiest in the UK	7.81	7.17	0.64
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	9.06	8.43	0.63
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.81	7.21	0.6
Keep bills affordable and show that services are value for money	8.66	8.17	0.49
Stop all sewage flooding into homes, gardens and businesses	8.89	8.45	0.44
Help customers to use much less water at home	7.66	7.34	0.32
Provide a more reliable supply of water	8.28	8.04	0.24
Help reduce disruptive rainwater flooding	8.06	7.89	0.17
Replace all lead pipes	8.96	8.87	0.09
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.43	8.43	0
Reduce leakage to below 10% (the proportion of water that leaks out of pipes on its way to customers)	8.94	8.96	-0.02

Ranked by difference in Importance and Urgency scores

Difference:

≥ 0.5

< 0.5

The importance-urgency gap varies by goal

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (Informed fresh - 49)

Vision 2050 goal	Importance	Urgency	Difference
Create attractive jobs for people in our communities and help develop skills	6.89	5.34	1.55
Use the land Thames Water owns to create jobs and housing	6.09	4.55	1.54
Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service	7.32	6.13	1.19
Provide a more reliable supply of water	8.81	7.64	1.17
Help customers to use much less water at home	7.72	6.7	1.02
Lead the improvement of rivers in our region so they become among the healthiest in the UK	7.87	6.89	0.98
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.45	7.62	0.83
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	8.04	7.21	0.83
Maximise the green energy produced for Thames Water and for local communities	7.36	6.55	0.81
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	6.49	5.7	0.79
Guarantee high quality drinking water	9.47	8.7	0.77
Fix service issues on the same day	8.11	7.4	0.71
Reduce leakage to below 10% (the proportion of water that leaks out of pipes on its way to customers)	8.11	7.57	0.54
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.02	6.49	0.53
Help reduce disruptive rainwater flooding	7.36	6.89	0.47
Keep bills affordable and show that services are value for money	8.74	8.32	0.42
Replace all lead pipes	8.72	8.45	0.27
Stop all sewage flooding into homes, gardens and businesses	8.43	8.17	0.26
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	7.83	7.57	0.26

Ranked by difference in Importance and Urgency scores

Difference:

≥ 0.5

< 0.5

Differences emerge by sample type, with NHH customers' scores most likely to be significantly lower than at least one other group's

Personal importance of Vision 2050 goals: differences between sample types

▲ Sig difference at 95% CI
▼

Vision 2050 goal	Uninformed HH (500)	Informed panel (50)	Informed fresh (49)	Uninformed NHH (100)
Guarantee high quality drinking water	8.70 ▼	9.47 ▲	9.47 ▲	8.90 ▼
Replace all lead pipes	8.11 ▼	8.96 ▲	8.72 ▲	7.88 ▼
Provide a more reliable supply of water	8.37	8.28	8.81 ▲	8.09 ▼
Reduce leakage to below 10%	8.44	8.94 ▲	8.11	8.23 ▼
Help customers to use much less water at home	7.66 ▲	7.66	7.72	7.10 ▼
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.58 ▼	9.06 ▲	8.45	8.43 ▼
Stop all sewage flooding into homes, gardens and businesses	8.44	8.89	8.43	8.43
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	8.32	8.43	7.83	8.40
Lead the improvement of rivers in our region so they become among the healthiest in the UK	8.16	7.81	7.87	8.17
Help reduce disruptive rainwater flooding	8.08 ▲	8.06	7.36 ▼	7.88
Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service	7.52	7.15	7.32	7.26
Fix service issues on the same day	8.11	7.91	8.11	8.01
Keep bills affordable and show that services are value for money	8.37	8.66	8.74	8.30
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.73	7.81	7.02	7.22
Maximise the green energy produced for Thames Water and for local communities	7.65	7.66	7.36	7.58
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	8.05 ▲	8.17	8.04	7.57 ▼
Create attractive jobs for people in our communities and help develop skills	7.52 ▲	6.70 ▼	6.89	6.91 ▼
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.74 ▲	7.40	6.49 ▼	7.00 ▼
Use the land Thames Water owns to create jobs and housing	7.33 ▲	6.02 ▼	6.09 ▼	6.52 ▼

In terms of urgency for improvement, the uninformed qual participants are most likely to give significantly lower scores than others

Urgency for improving Vision 2050 goals: differences between sample types

▲ Sig difference at 95% CI
▼

Vision 2050 goal	Uninformed HH (500)	Informed panel (50)	Informed fresh (49)	Uninformed NHH (100)
Guarantee high quality drinking water	8.31	8.66	8.70	8.58
Replace all lead pipes	7.60 ▼	8.87 ▲	8.45 ▲	7.50 ▼
Provide a more reliable supply of water	7.83	8.04	7.64	7.80
Reduce leakage to below 10%	8.00 ▼	8.96 ▲	7.57 ▼	7.83 ▼
Help customers to use much less water at home	7.30	7.34	6.70	6.97
Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment	8.09	8.43	7.62	7.88
Stop all sewage flooding into homes, gardens and businesses	8.03	8.45	8.17	8.17
Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers	7.90 ▼	8.43 ▲	7.57 ▼	8.17
Lead the improvement of rivers in our region so they become among the healthiest in the UK	7.66	7.17	6.89 ▼	7.88 ▲
Help reduce disruptive rainwater flooding	7.82 ▲	7.89 ▲	6.89 ▼	7.73 ▲
Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service	6.89 ▲	6.00 ▼	6.13	6.50
Fix service issues on the same day	7.62	7.11	7.40	7.59
Keep bills affordable and show that services are value for money	8.09	8.17	8.32	8.13
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)	7.30	7.21	6.49	6.77
Maximise the green energy produced for Thames Water and for local communities	7.42	6.83	6.55	6.91
Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances	7.50 ▲	7.30	7.21 ▼	7.21 ▲
Create attractive jobs for people in our communities and help develop skills	6.97 ▲	5.64 ▼	5.34 ▼	6.43
Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit	7.21	6.30	5.70	6.85
Use the land Thames Water owns to create jobs and housing	6.73 ▲	5.02 ▼	4.55 ▼	6.12 ▼

What's missing from the Vision (1) - Customers tended to emphasise what is important

Although no 'new' areas were mentioned, customers spoke about elements of these that mattered most

Improve communication and transparency

Customers elaborated on what areas of 'Customer' they'd like to see improved, such as communications when issues arise.

"Where a burst water main occurs, Thames Water needs to beef up its communication to affected households and assistance it provides on a timely basis"

Male, 65+, ABC1, White, Vulnerable, Dual London

Ensure high water quality

Although 'Water' was a theme, customers explicitly mentioned water quality, taste and purity as important factors to get right.

"Recycling water, purification of the tap water. I feel scared of drinking water from the tap as it is full of metals and other things bad for our health"

Female, 35-44, ABC1, BAME, Vulnerable, Waste Only, South East Water

Education and responsibility

Customers emphasised that river cleanliness and climate change are important to tackle, and many emphasised that education and assistance from Thames Water to help them behave more responsibly with regard to water and waste is important

"I think that creating more awareness in terms of what every individual can contribute to reduce wastage [is important], which I have seen some adverts already, but this does not provide specific actions."

Female, 25-34, ABC1, BAME, Dual, Slough/Wycombe/Aylesbury

What's missing from the Vision (2) - Open conversations and help to 'go green'

Although topics largely aligned with the goals, customers expanded on what they'd like to see

Open and transparent

Transparency was mentioned by a few customers, with some feeling cynical about how these aims will be prioritised against earnings and bonuses.

Others wanted more commitments to an open conversation between Thames Water and its customers, seeing this as crucial to ensuring customer needs are understood and acted upon.

"Stop ALL bonus payments until such time as ALL these have been achieved!"

Male, 55-64, C2DE, White, Dual, Swindon Oxford

"Check on their customers on a regulars basis to adapt their need (change of pipes, reduction of bills) etc."

Female, 35-44, ABC1, BAME, Dual, London

Helping customers go green

Ensuring Thames Water operates more efficiently again came out, with customers looking for extra support from the company to help them achieve this themselves. Finding new ways to reduce and re-use water was important.

"Develop options for customers to re-use some of their own waste water – for example, a storage & treatment tank which will allow customers to re-use some of their own waste water for watering lawns/garden and flush toilet."

Female, 45-54, ABC1, BAME, Vulnerable, Dual, Kennet Valley

Importance scores tend to be higher among women, those aged 35+ and Clean & Waste customers

Personal importance of Vision 2050 goals: subgroup differences

Gender

Women gave significantly higher importance scores than men for:

- Guarantee high quality drinking water
- Help customers to use much less water at home
- Ensure there is enough water for customers in the future...
- Keep bills affordable and show that services are value for money
- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities
- Provide an inclusive service that works for everybody and that everyone can afford...
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit

Age

Significantly higher importance scores typically given by customers aged 35+ for each goal, except for the following where scores were similar across age groups:

- Help customers to use much less water at home
- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities
- Provide an inclusive service that works for everybody and that everyone can afford...
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to create jobs and housing

Service type

Dual (clean and waste) customers gave significantly higher importance scores for:

- Help customers to use much less water at home
- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities

There are some significant differences in both importance and urgency for goals identified by audience type

- **Importance**

- Business customers see all '*Water*' goals as significantly less important than selected other audiences
- Business customers also see all '*Communities Impact*' goals as less important than uninformed household customers
- Uninformed household customers see '*high quality drinking water*', '*replace all lead pipes*' and '*ensure enough water for the future*' as less important than qualitative informed and less-informed customers
- Broadly speaking uninformed household customers see '*Communities Impact*' goals as more important than other audiences

- **Urgency for improvement**

- '*Replace all lead pipes*' is seen as more important by qualitative informed and less-informed audiences than uninformed household and business audiences; this may suggest the detail provided to the community participants on the potential dangers of lead may have an urgency effect
- '*Reduce leakage below 10%*' is seen as having a greater urgency for improvement by informed qualitative participants than all other audiences
- '*Help reduce disruptive rainwater flooding*' is seen as less important by less-informed qualitative participants than all other audiences

Similarly for urgency for improvement scores, women, those aged 35+ and Clean & Waste customers are more likely to give higher scores

Urgency for improving Vision 2050 goals: subgroup differences

Gender

Women gave significantly higher urgency for improvement scores than men for:

- Guarantee high quality drinking water
- Lead the improvement of rivers in our region so they become among the healthiest in the UK
- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities
- Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances

Age

Significantly higher urgency for improvement scores typically given by customers aged 35+ for each goal, except for the following where scores were similar across age groups:

- Help customers to use much less water at home
- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit
- Use the land Thames Water owns to create jobs and housing

Service type

Dual customers gave significantly higher urgency for improvement scores for:

- Help customers to use much less water at home
- Help tackle climate change by becoming 'net negative'
- Maximise the green energy produced for Thames Water and for local communities
- Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to create jobs and housing

Scores are also more likely to be higher among those in the Thames Valley & Home Counties and white customers

Personal importance of Vision 2050 goals: subgroup differences

Location

Thames Valley & Home Counties customers gave significantly higher importance scores for:

- Guarantee high quality drinking water
- Stop all sewage flooding into homes, gardens and businesses
- Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers

London customers gave a significantly higher importance score for:

- Use the land Thames Water owns to create jobs and housing

Ethnicity

White customers gave significantly higher importance scores for:

- Guarantee high quality drinking water
- Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment
- Stop all sewage flooding into homes, gardens and businesses
- Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers
- Keep bills affordable and show that services are value for money

Disability

No significant differences by disability

Income*

Higher income customers gave higher importance scores for:

- Guarantee high quality drinking water
- Stop all sewage flooding into homes, gardens and businesses
- Fix service issues the same day

Lower income customers gave higher importance scores for:

- Provide an inclusive service that works for everybody and that everyone can afford

A3. Please rate each of the goals on a scale of 0 to 10, where 0 is 'not at all important' and 10 is 'very important'. Base: All HH qual and quant survey respondents (594)

*Higher/lower income based on the threshold of £19,748 annual household income, the eligibility level for the social tariff in London (there is a lower threshold elsewhere, but this figure was used for ease of analysing respondents in two groupings).

Those in London, white customers and customers without a disability are more likely to rate goals as being urgent for improvement

Urgency for improving Vision 2050 goals: subgroup differences

Location

London customers gave significantly higher urgency for improvement scores for:

- Help customers to use much less water at home
- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit
- Use the land Thames Water owns to create jobs and housing

Ethnicity

White customers gave significantly higher urgency for improvement scores for:

- Replace all lead pipes
- Reduce leakage to below 10%
- Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment
- Stop all sewage flooding into homes, gardens and businesses
- Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers
- Help reduce disruptive rainwater flooding
- Keep bills affordable and show that services are value for money

BME customers gave a significantly higher urgency for improvement score for:

- Use the land Thames Water owns to create jobs and housing

Disability

Those without a disability gave significantly higher urgency for improvement scores for:

- Guarantee high quality drinking water
- Provide a more reliable supply of water
- Keep bills affordable and show that services are value for money

Income*

Higher income customers gave higher urgency improvement scores for:

- Provide a more reliable supply of water
- Ensure there is enough water for customers in the future, without taking too much from rivers and harming the environment
- Keep bills affordable and show that services are value for money
- Help tackle climate change by becoming 'net negative'

A4. How urgent is it that Thames Water makes the improvements for each of the goals? Base: All HH qual and quant survey respondents (594)

*Higher/lower income based on the threshold of £19,748 annual household income, the eligibility level for the social tariff in London (there is a lower threshold elsewhere, but this figure was used for ease of analysing respondents in two groupings).



Differences between London and Thames Valley & Home Counties customers

London and Thames Valley customers tend to prioritise goals differently in some areas

- Areas where the differences between London and Thames Valley customers are most pronounced:

Importance of 2050 goals

Thames Valley & Home Counties customers gave significantly higher importance scores for:

- Guarantee high quality drinking water
- Stop all sewage flooding into homes, gardens and businesses
- Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers

London customers gave a significantly higher importance score for:

- Use the land Thames Water owns to create jobs and housing

Urgency of 2050 goals (no significant differences for Thames Valley)

London customers gave significantly higher urgency for improvement scores for:

- Help customers to use much less water at home
- Provide an easy and personalised customer service, using the latest technology, for everyone who uses the service
- Create attractive jobs for people in our communities and help develop skills
- Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit
- Use the land Thames Water owns to create jobs and housing

In terms of how goals are clustered by both importance and urgency to improve, London customers tend to cluster scores across all goals closer together; there is greater differentiation across score for Thames Valley customers (see following slides)

Mean combined 'Importance'/'Urgency for improvement' scores show some clear differences between London and Thames Valley customers.

Mapping Vision 2050 priorities; mean of importance and urgency for improvement (All informed qual and uninformed HH quant - 591)



Between Thames Valley and London, the Thames Valley region tends to see a greater gap between importance and urgency.

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (All informed qual and uninformed HH quant - 591)



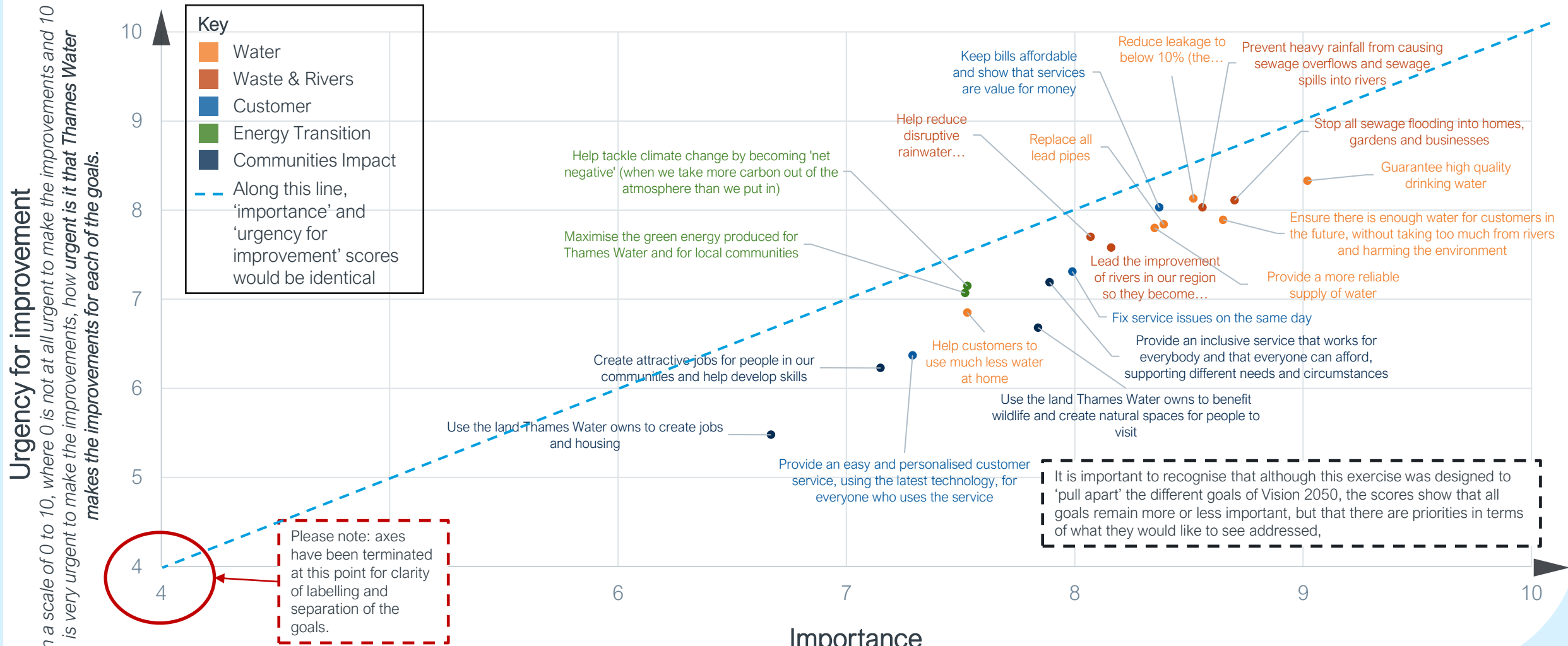
London: water and waste goals tend to be rated as more important and more urgent for improvement; at the same time, all goals can be deemed important

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (All London qual and uninformed HH quant - 338)



Thames Valley: water and waste goals tend to be rated as more important and more urgent for improvement; at the same time, all goals can be deemed important

Mapping Vision 2050 priorities; personal importance vs urgency for improvement (All Thames Valley qual and uninformed HH quant - 253)



Appendix

Methodology, sampling details and declaration

Qualitative community research sample

This research was designed to capture the diversity of Thames Water's customer base

Customer Groups	Count completing the research
Thames Water Customer Voices panel ('Informed panel')	59
Thames Water customers (recruited externally, 'Informed fresh')	38
Future customers (recruited externally, 'Informed fresh')	8
Business customers (recruited externally, 'Informed fresh')	17

- 130 customers were invited to the research, 122 (shown above) completed all questions to day 4 and 111 completed all questions to day 6
- Specific demographics collected from participants closely matched that of the Thames Water customer base* (details on following pages)
- **Informed panel customers** – The 59 members of our Customer Voices panel had undertaken two or more of the previous enhancement case deep dives or PR24 foundational research activities. Therefore they already had some understanding of Thames Water's proposed future commitments and had given thought to some of the initiatives and challenges involved.
- **Informed fresh customers** – We also invited a set of freshly recruited 'off-panel' customers (38 existing customers, 8 future customers and 17 business customers) none of whom had been involved in previous research for Thames Water. These were informed of the issues through this study.

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

Qualitative methodology: customers reviewed Thames Water's 2050 strategic roadmap and public value framework across a 6-day online community

Day 1 (7 April)

- Unprompted expectations of Thames Water and what issues are top of mind
- Initial responses on what customers expect in each of the five Vision 2050 outcomes (water, waste/rivers, customer, energy and communities)
- Initial reaction to overall Vision 2050

Days 2-4 (8-12 April)

Objectives:

- Reactions to the 19 individual goals of Vision 2050
- Assess if the timescale for each goal is: about right, too fast or, too slow
- Gauge level of support for each goal and reasons behind this
- Ascertain for each goal - personal importance, reactions to current performance and how changes will be achieved

Day 5 (13 April)

Objectives:

- Support for Vision 2050 overall
- Any gaps in the vision
- Assessment of importance and then urgency of each goal

Day 6 (14 April)

Objectives:

- Unprompted expectations of Thames Water's role beyond core services
- Initial responses to the proposed public value framework
- Importance of the 17 individual activities in the public value framework
- Any gaps in the framework
- Assessment of priority for each activity

Qualitative community research sample

Themes Water Customer Voices Customers (59)

Gender	Quota targets	Quota actual
Male	29	30
Female	31	29
Age Group	Quota targets	Quota actual
18 - 24	9	1
25 - 34	13	13
35 - 44	11	13
45 - 54	10	13
55 - 64	7	6
65+	10	8
Socio-economic group	Quota targets	Quota actual
SEG AB	17	24
SEG C1	20	17
SEG C2	10	5
SEG DE	13	13
Ethnicity	Quota targets	Quota actual
White	44	43
BME	16	16
Disability (vulnerability)	Quota targets	Quota actual
Yes	8	9
No	52	50
Service Type	Quota targets	Quota actual
Clean & Waste	37	35
Waste only	23	24

Thames Water Population	Quota targets	Quota actual
Dual service area		
London	29	29
Swindon/Oxford	4	1
Slough/Wycombe/Aylesbury	2	3
Kennet Valley	2	0
Guildford	1	1
Henley	0	0
Waste-only area		
Affinity Water	12	12
South East Water	4	3
Essex & Suffolk Water	3	1
Sutton & East Surrey Water	3	7
Southern Water	1	1
Anglian Water	1	0

Prior research activities undertaken	Quota actual
PR24 Foundation	7
Net Zero deep dive	49
Trunk Mains deep dive	34
Waste headroom/spills/bathing deep dive	58
Lead Pipes deep dive	34
Sustainable abstraction deep dive	47

Quota targets from 'Customer research and sampling approach September 2018' document, supplied by Thames Water

Qualitative community research sample

Thames Water Externally Recruited Customers (38)

Gender	Quota targets	Quota actual
Male	20	19
Female	20	19

Age Group	Quota targets	Quota actual
18 - 24	6	6
25 - 34	8	9
35 - 44	8	7
45 - 54	7	7
55 - 64	5	5
65+	6	4

Socio-economic group	Quota targets	Quota actual
SEG AB	12	11
SEG C1	13	13
SEG C2	7	7
SEG DE	8	7

Ethnicity	Quota targets	Quota actual
White	30	21
BME	10	17

Disability (vulnerability)	Quota targets	Quota actual
Yes	6	4
No	34	34

Service Type	Quota targets	Quota actual
Clean & Waste	25	23
Waste only	15	15

Thames Water Population	Quota targets	Quota actual
Dual service area		
London	19	20
Swindon/Oxford	3	3
Slough/Wycombe/Aylesbury	1	1
Kennet Valley	1	1
Guildford	0	0
Henley	0	0
Waste-only area		
Affinity Water	8	8
South East Water	3	3
Essex & Suffolk Water	2	2
Sutton & East Surrey Water	2	2
Southern Water	0	0
Anglian Water	0	0

Future Customers (8)

Future customers (18-24 yrs)	Quota targets	Quota actual
Male	5	4
Female	5	4
ABC1	5	5
C2DE	5	3
White	6	4
BAME	4	4
Dual service	7	6
Waste only	3	2

Business customers (17)

Business sample	Quota targets	Quota actual
0-9 employees	8	7
10-49 employees	8	6
50+ employees	4	4
Water reliant	10	10
Non-water reliant	10	7

Quantitative methodology and sample

A 10-minute online survey was conducted between 19th and 27th April 2022 with 500 Household (Uninformed HH) customers and 100 Business/Non-household (Uninformed NHH) customers

HH customers sample profile:

Total	Unweighted		Weighted	
	Count	%	Count	%
Gender				
Male	241	48%	240	48%
Female	256	51%	250	50%
Other / prefer not to say	3	1%	10	2%
Age				
18-24	55	11%	75	15%
25-34	80	16%	105	21%
35-44	113	23%	95	19%
45-54	99	20%	85	17%
55-64	70	14%	60	12%
65+	83	17%	80	16%
SEG				
AB	165	33%	145	29%
C1	183	37%	165	33%
C2	38	8%	85	17%
DE	114	23%	105	21%

Total	Unweighted		Weighted	
	Count	%	Count	%
Ethnicity				
White	378	76%	370	74%
BME	122	24%	130	26%
Disability (vulnerability)				
Disabled	83	17%	70	14%
Not disabled	417	83%	430	86%
Service type				
Dual service	335	67%	310	62%
Waste only	165	33%	190	38%
Region				
London	296	59%	365	73%
Thames Valley & Home Counties	204	41%	135	27%

We applied demographic quotas in order to achieve a regionally representative sample – any skews were then corrected via weighting the data. N.B for 'Region', we intentionally oversampled Thames Valley & Home Counties customers to ensure a more robust unweighted sample for analysis.

Quantitative methodology and sample

A 10-minute online survey was conducted between 19th and 27th April 2022 with 500 Household (Uninformed HH) customers and 100 Business/Non-household (Uninformed NHH) customers

NHH customers sample profile:

Total	Unweighted		Weighted	
	Count	%	Count	%
Company size				
0-9 employees	66	66%	90	90%
10+ employees	34	34%	10	10%
Number of sites				
Single site	68	68%	94	94%
Multi-site	32	32%	6	6%
Region				
London	67	67%	73	73%
Thames Valley & Home Counties	33	33%	27	27%

Total	Unweighted		Weighted	
	Count	%	Count	%
Industry type				
Construction, mining, manufacturing, agriculture	20	20%	16	16%
Wholesale, retail, repair motor vehicles, transportation	14	14%	14	14%
Accommodation and food service activities	7	7%	7	7%
Services – information, financial, real estate, professional, scientific, technical activities, admin and support	42	42%	48	48%
Public organisations, education, health and social work	9	9%	9	9%
Other services	8	8%	7	7%

We applied firmographic quotas in order to achieve a regionally representative sample – any skews were then corrected via weighting the data. N.B for 'Region', we intentionally oversampled Thames Valley & Home Counties customers to ensure a more robust unweighted sample for analysis.

A note on sample size variations

Sample sizes vary across the project slightly due to participation levels across the six day community

- In a small number of cases throughout, differences may be observed in qualitative sample sizes (notably the 'survey' style questions throughout both Vision 2050 and Public Value qualitative evaluations). The reason for this is that over the course of a six day community, there will inevitably be *some* dropout
- Our initial sample counts were already upweighted to account for dropout (e.g. 60 informed panellists to ensure a sample size of 50), and thus the overall sampling goal has not suffered as a result
- Over the course of six days, there were a small number of customers that dropped out, as well as some customers that were unable to complete every day's activities (e.g. two customers contracted Covid during fieldwork and contacted us to apologise for not completing certain sections)
- In addition, Vision 2050 goals and Public Value activities were rotated across customers such that they did not all see them in the same order. This combined with occasional dropouts means that base sizes can vary slightly with no clear pattern
- Wherever a survey style question has been answered, we have included this in the data, even if a customer did not manage to complete all sections. In nearly all cases over 100 customers completed activities, with one exception where a survey style question was completed by 94
- For quantitative survey data, a total of 711 responses are shown (those from the quantitative survey plus the survey-style questions answered by qualitative community participants), however 12 qualitative community participants did not correctly identify themselves at the survey stage, so they won't appear in some of the analysis, bringing the total to 699

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

Ofwat's minimum standards for high quality research	How we met these standards
Useful and contextualised	<p>This research was conducted to inform the development of Thames Water's 2050 Vision, to ensure these align with customer needs and expectations. The 2050 Vision itself was developed from previous customer insight, and this research falls into a wider body of insight gathering aimed to understand what customers want from Thames Water in the near and longer term, to inform ongoing service delivery, the business plan and long term delivery strategies. At the start of the process we explained to customer participants the purpose of the research and reminded them during the research too. At the time of the research there had been ongoing (over a year) national and local media coverage of sewage overflows into rivers. This may have given heightened awareness and concern with this issue.</p>
Neutrally designed	<p>In this research we spoke to customers with varying levels of knowledge of Thames Water, as some had been involved in previous research via our Customer Voices community panel. This was to understand if pre-existing positive or negative bias towards Thames Water impacted views for the topics explored in this study.</p> <p>To negate any bias in this approach all customers in the qualitative online community were initially asked their general opinions about Thames Water and what they wanted Thames Water to do in the future. They were then brought to a common understanding of Thames Water and its long-term vision. They were provided with details to help them make judgements on the nineteen Vision 2050 goals, including contextual information about each topic, current company performance, comparison with other water companies and consequences on service, wider society and the environment. Billing impact was not available, but we did remind customers that there would be bill impacts to any changes/improvements discussed, so we asked them to consider that in their answers.</p> <p>Customers in the quantitative survey were presented with a more condensed set of questions and stimulus than in the qualitative survey. We ensured that questions and stimulus in both surveys used plain English for maximum comprehension. A small number of Verve team members not associated with the project fed back informally on survey comprehension as it was being developed.</p>
Fit for purpose	<p>We used a qualitative and quantitative methodology to fully meet the objectives of this research. Statistically robust data from the quantitative research was used to sense check the interpretation of the qualitative insights, including segment differences.</p> <p>The online community approach (used for the qualitative stage) enabled individuals to take part that may not have normally had the time to attend focus groups or workshops (in-person methods that Thames Water used a lot for its PR19 customer research). The online community method also allowed customers to express themselves individually and more freely without the social pressure of a focus group/workshop scenario. Comprehension of some of the complex topics discussed was also helped because participants could view and review stimulus material at their own pace, allowing them time to digest and reflect on information, without the pressure to answer immediately.</p> <p>We ensured that questions and stimulus in both the qualitative and quantitative surveys used plain English for maximum comprehension, and in the quantitative survey we included some open-ended questions to give further depth to the closed questions.</p> <p>We appreciate the difficulty for customers in giving informed responses to future-facing research like this – we asked customers about their views on long term improvements in principle, based on current and historic experience.</p> <p>We did not feel this research was complex enough to require piloting before the fieldwork started, but as the online community allows our researchers to individually moderate each participant, if there was any misunderstanding of the research activities then there was an opportunity to clarify things.</p>

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

Ofwat's minimum standards for high quality research	How we met these standards
Inclusive	<p>We spoke to a broadly representative group of customers, including household, non household, vulnerable and future customers. We used qualitative and quantitative methodologies (online community and online survey) to simulate different levels of being pre-informed about the topics covered. We included some customers who'd been involved in previous Thames Water studies via the Customer Voices panel, as well as 'fresh' respondents. See the report appendix for a full breakdown of the sample and how it met Thames Water's customer segment quotas.</p> <p>The online methodologies used allowed individuals to have a voice where other methods may have restricted this. For instance, those that work full time, have family commitments, certain disabilities, financial issues or language barriers might find it difficult to participate in other research methodologies. With the exception of not being able to reach people with limited or no access to the internet, online methodologies work well to attract involvement from a good cross section of Thames Water's customer base.</p> <p>Our research findings identify where there are any differences between customer segments.</p>
Continual	<p>Thames Water's research and engagement programme is continuous. The findings from this research will be used in conjunction with previous and future insights to inform Thames Water's day-to-day service delivery (e.g. to improve customer satisfaction), business plan and long-term delivery strategies.</p>
Independently assured	<p>Thames Water's research and engagement programme and line of sight process will be reviewed by an independent expert assurance partner as part of PR24 assurance.</p>
Shared in full with others	<p>Thames Water are planning to share research reports, including this one, with other water companies and with the general public.</p>
Ethical	<p>Verve is a member of and abides by the code of conduct of the Market Research Society.</p>