



Thames Water Customer Voices

Public Value research

May 2022

Report prepared by Verve





Background and methodology

Background: Public value framework

- Alongside the 2050 vision, Thames Water developed a public value investment framework to integrate the delivery of public value.
- This research was conducted to understand if customers think this is important and the types of public value that Thames Water should focus on.
- Thames Water has identified activities of public value under core themes, each with various initiatives:
 1. The environment
 2. Customer and communities
 3. Capability, employees and essential services

The environment

Activity	More about this
Getting more energy from renewable sources	Getting more of our energy from renewable sources (such as the sewage treatment process and solar panels and wind turbines on sites)
Looking after every drop of water	Limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains, and making sure water is used efficiently by all customers
Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
Keeping rivers clean	Making sure that sewage doesn't harm the quality of water in the environment
Keeping noise to a minimum	Protecting customers from noisy Thames Water activities such as roadworks or water and sewage treatment processes

Customers and communities

Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
Minimising transport disruption	Protecting customers from road or railway disruption that Thames Water activities may cause

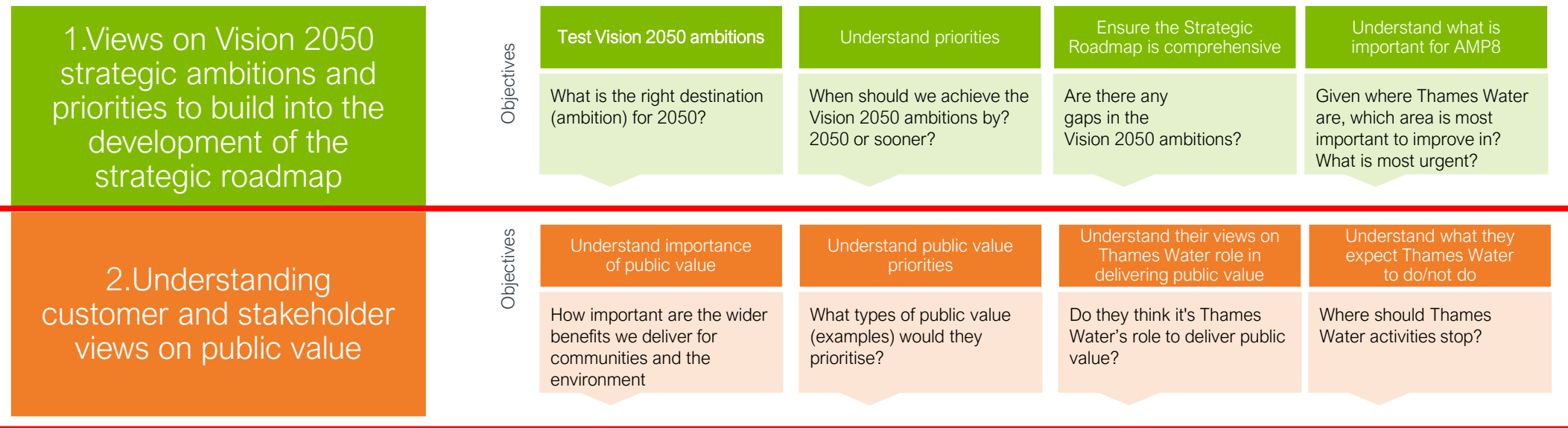
Capability, employees and essential services

Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment

Background

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 public value element of the research are shown in the red box below:



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

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 (online community formed in 2021, recruited mainly using Panelbase)
- 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 (Obsurant); 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 (Obsurant)
- 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

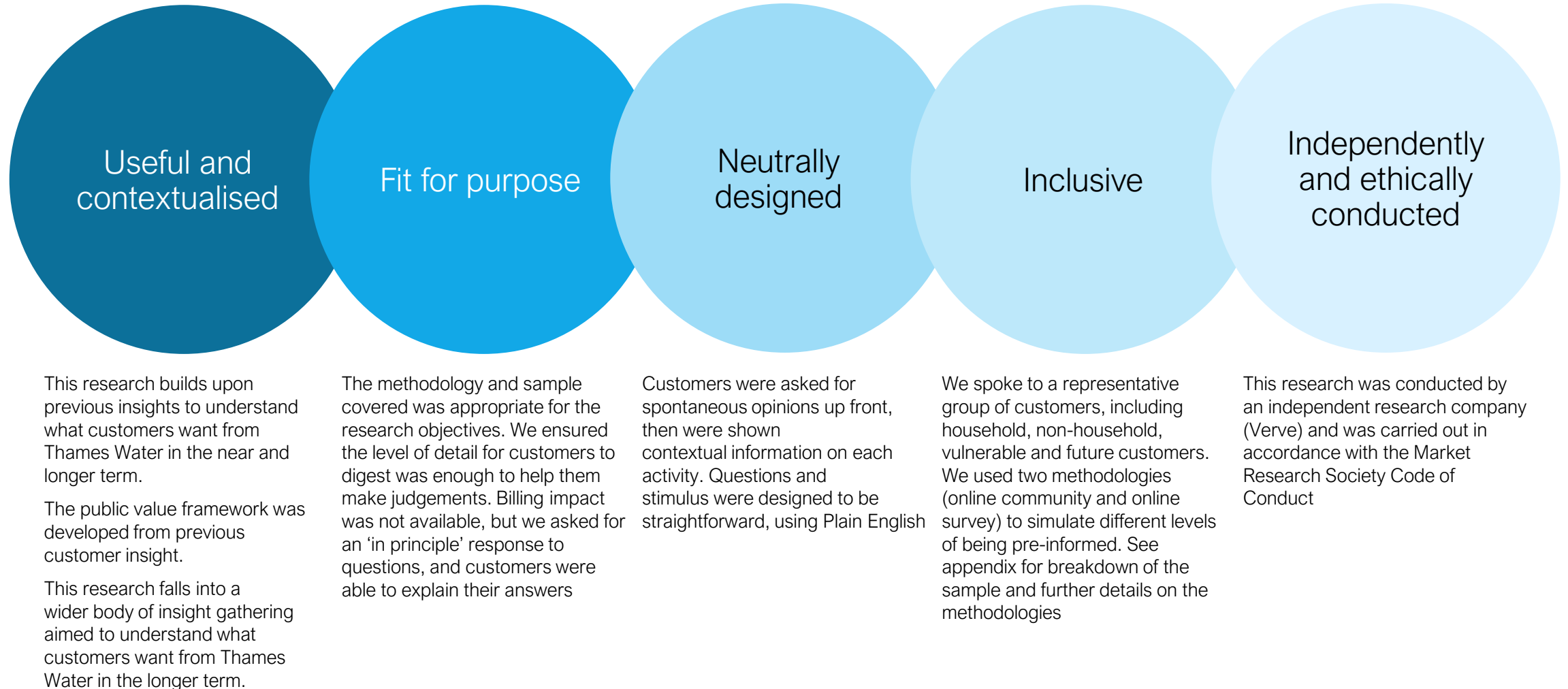
Quantitative online survey



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

Public Value

Based on both qualitative and quantitative findings

Customers reviewed the Public Value Framework on day 6 of the Vision 2050/Public Value community

- Before customers viewed the Public Value framework, they were provided with an opportunity to discuss what they would want Thames Water to do to make a difference
- They were told that that they would discuss some of Thames Water’s core services as well as other beneficial activities for customers, the communities and the environment
- Customers were informed that the activities would use money from customer bills
- They then viewed the potential Public Value activities as a whole and considered their level of support for this framework overall
- Customers then reviewed each of the 3 areas in turn (Environment, Customers & Communities and Capabilities, Employees & Essential Services). They gave their first impressions and opinion on the extent to which these should be Thames Water’s role
- Customers then finished discussing this by stating how important each individual activity was on a scale from 0-10, with 0 being ‘no priority at all’ and 10 being ‘very high priority’
- All research materials and stimulus shown can be found in the full reporting appendix

The environment

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Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
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Keeping rivers clean	Making sure that sewage doesn't harm the quality of water in the environment
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Customers and communities

Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
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Capability, employees and essential services

Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
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Public Value framework - Overview of key objectives

Understand importance of public value

How important are the wider benefits we deliver for communities and the environment

- A majority of customers are in support of the public value framework and believe such activities are an important part of how the business should conduct itself and what it should deliver
- However customers are willing to forfeit some elements of the framework, as priority is still placed on core water services

Understand public value priorities

What types of public value (examples) would they prioritise?

- There is a clear prioritisation towards core services and environmental elements
- Less clearly defined outcomes that are not aligned with the goal of delivering water and wastewater services to a high standard are seen as less of a priority (partly as a result of having less tangible outcomes)

Understand their views on Thames Water role in delivering public value

Do they think it's Thames Water's role to deliver public value

- Customers believe it is Thames Water's role to deliver public value in all the areas (Environment, Customer and communities, Capability, employees and essential services)
- However, some of the community focused outcomes are deemed less important (e.g. 'connecting you with your surroundings')

Understand what they expect Thames Water to do/not do

Where should Thames Water activities stop?

- Customers are willing for Thames Water to limit the scope of public value if it impedes the delivery of core services and increases water bills
- Some activities are deemed to benefit from Thames Water's input but are also the responsibility of other organisations
- Many feel the commitment to these activities are commendable overall

Overall, customers believe the public value framework is very important

- Almost every customer we spoke to supported the public value framework
- Customers appreciate Thames Water’s commitment to the environment, community and its employees
- Many believe that a company of Thames Water’s importance and standing has an ethical responsibility to protect its customers and to safeguard the environment while delivering core services. They believe the framework meets this expectation
- However, while these activities are perceived as important, many would forego some elements if they negatively impacted the core water services Thames Water provided
- Also, some noted they would want to see the impact on their bills to be able to fully endorse the activities listed here

Understand importance of public value

How important are the wider benefits we deliver for communities and the environment

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Capability, employees and essential services

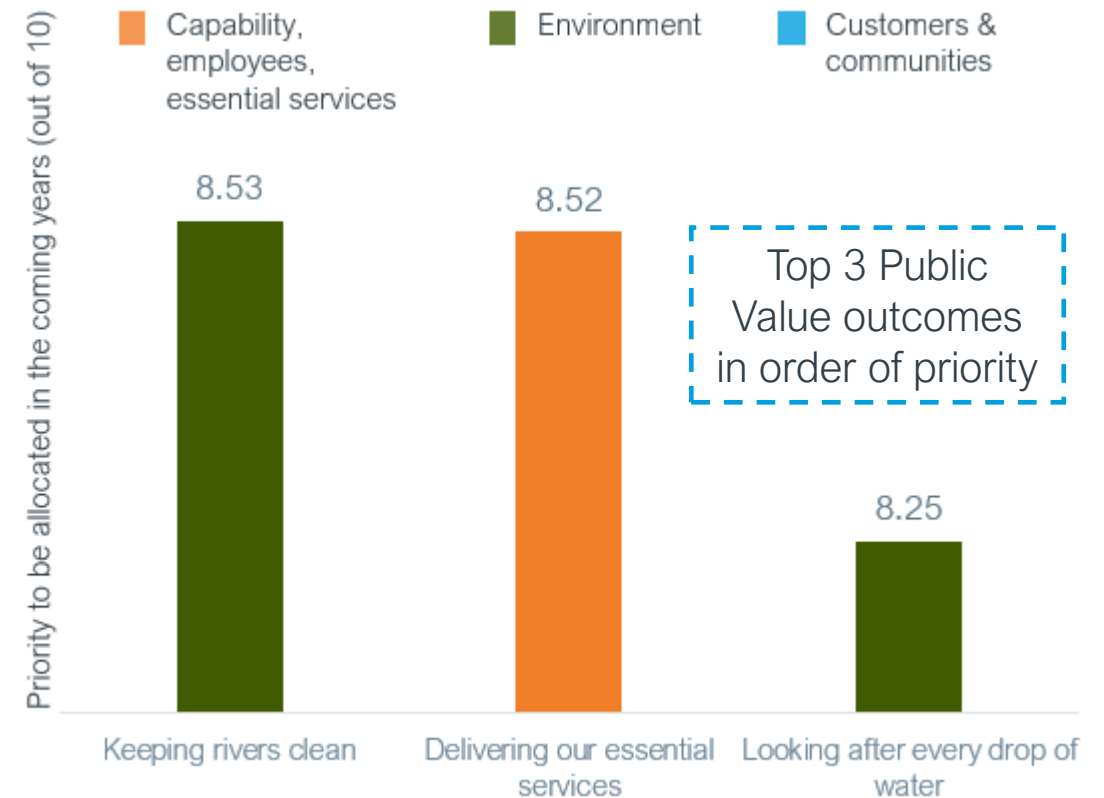
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Prioritisation of Public Value elements

- Quantitative data shows a clear prioritisation of core essential services (delivering the **water and wastewater service**) and **environmental** elements (keeping rivers clean and limiting the amount of water taken from them)
- 'Keeping rivers clean' is given the highest overall priority alongside 'delivering our essential services'
- Those elements that are deprioritised tend to be the less tangible or less service related, such as 'connecting you with your local surroundings' and 'bringing communities together'
 - This deprioritisation appears to be influenced by customers being less sure about what is being delivered
 - Some are simply not focused on things they expect of Thames Water as a priority (ie: anything other than delivering core services to a high standard)
 - 'Customers and communities' outcomes feature rarely in the top half of priorities overall 9with the exception of 'helping those that need it most' (5th position)

Understand public value priorities

What types of public value (examples) would they prioritise?



A6. Thinking about all the activities that you've just reviewed, we'd like you to rate all of them in terms of how much priority you want Thames Water to allocate to each in the coming years, on a scale of 0-10, where 0 is 'no priority at all' and 10 is 'very high priority'?
Base: All respondents (698)

River cleanliness and delivery of essential services are the key priorities overall

Understand public value priorities

What types of public value (examples) would they prioritise?

Public value; overall priority for each element (All informed qual and uninformed quant responses - 698)



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Customers believe it is Thames Water's role to deliver public value

- **Environment**

- Customers believe that in addition to Thames Water's core services, it should be looking to safeguard the environment where possible, and that historically, this has been neglected
- Many believe the environmental activities proposed should be carried out faster if possible

- **Customers and communities**

- Customers believe that no customer should be without water and therefore, if they cannot afford to pay, Thames Water and the government have an ethical obligation to make sure water poverty is abolished
- Many customers comment that Thames Water should receive assistance from other bodies in areas relating to enhancing local communities. *Delivering public value that benefits communities is not seen as down to Thames Water alone, and there is a sense that its contribution should supplement the efforts of central and local government*

- **Capability, employees and essential services**

- Customers believe that it is Thames Water's role to protect and upskill its workforce, because otherwise, core water services may not be met

Understand their views on Thames Water role in delivering public value

Do they think it's Thames Water's role to deliver public value?

The environment

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Generally, customers think Public Value should not be at the expense of the core essential services

Understand what they expect Thames Water to do/not do

Where should Thames Water activities stop?

- Generally, customers think that the list of Thames Water's proposed activities should only be limited if these impede core water services or significantly increase customer bills
- The following activities were often felt to be a shared responsibility between the government, local authorities (with no real distinction given between government and local councils) and Thames Water:
 - Promoting outdoor exercise at Thames Water sites
 - Keeping noise to a minimum
 - Connecting you to your surroundings
 - Minimise transport disruption
 - Helping local communities thrive
- However, it should be noted many customers believe that Thames Water's commitment to 'being a force for good' is credible and so should be highly commended.



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, 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 tap on and give you a warning so you don't waste water which is better for the environment

Male, 18-24, ABC1, White, Vulnerable, 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?*

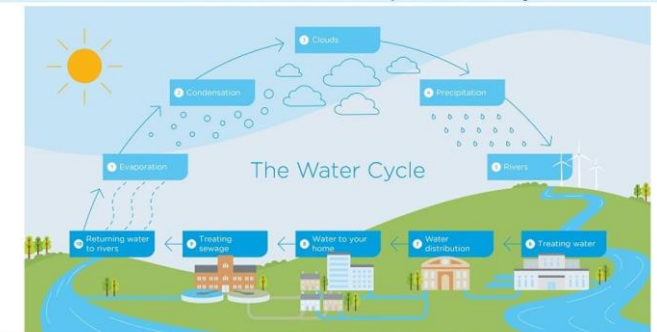
Thames Water is the UK's largest water and wastewater services provider



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

Customers reviewed the Public Value Framework on day 6 of the community

- Before customers viewed the Public Value framework, they were provided with an opportunity to discuss what they would want Thames Water to do to make a difference
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- For a full transcription of discussion guide and the stimulus shown, please see the separate appendix.

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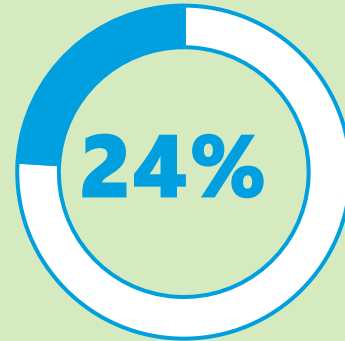
Support for the Public Value framework overall – many believe Thames Water can have a positive impact on the environment and wider community. But some want more detail about costs and timings

82 customers 'strongly support' the plan



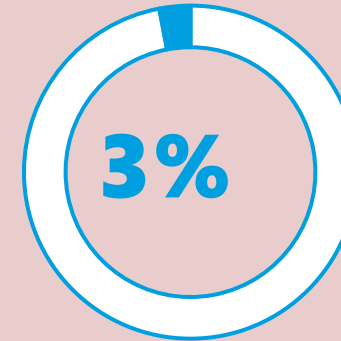
- Customers are impressed by the framework and feel Thames Water is going above what one would expect from a water company.
- The framework demonstrates a 'force for good'; the business is making it a duty to make a positive impact on both the community and the environment.
- Some highlight how the plan demonstrates taking social responsibility by looking after customers, staff and the environment.

28 customers 'somewhat support' the plan



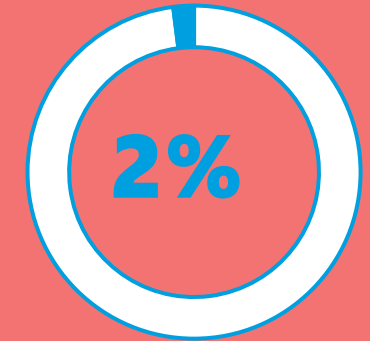
- Customers are supportive of the framework but are unsure of how achievable all elements are.
- Some argue community orientated goals should be a secondary priority.
- Customers feel like more clarity is needed to fully support the plan and would like to see more transparency about costs.

3 customer 'somewhat oppose' the plan



- A very small number of customers do not think it is possible to achieve all these aspirations
- They feel too much focus could be placed on new ventures that could impact core services
- They do not want core services to be deprioritised against 'new' or 'extracurricular' activities

2 customer 'strongly oppose' the plan



- One customer believes more focus should be put on current services and lowering bills in a climate where prices are increasing.
- Another feels certain plans will benefit only some customers and are not relevant to them.

As an overall plan for Thames Water to be 'a force for good' would you support or oppose this list of activities?

Caution, the percentages shown on this page are based on a relatively small qualitative sample size, they are shown to indicate direction of sentiment only

Although most customers support the Public Value framework, they feel there are still some elements that can be enhanced

The majority of customers were impressed with the variety of issues covered

- Many customers believe the framework will have a positive impact on both them as customers but also society in general.
- Therefore, they see Thames Water as having a 'good moral code' and a company that 'thinks beyond its own profits'.

However, some want more assurance about the framework

- These customers still support what the plan represents but feel they can't fully commit to it because there is clear prioritisation of which initiatives will be completed at what time.
- They also want to know how this will impact their bills.

Several ideas emerged from a handful of participants who feel there were areas missing:

- Quick repairs to infrastructure to maintain the service and prevent damage.
- An online service portal to support customers and communities.
- Metered supply with automatic reading in every household.
- Upskill and train the local community about local problems.
- Work with education at all levels from pre-school to adults.
- Work alongside local farmers and collaborate.

Note: Customers often referred to the Public Value activities as '2050 goals' as they had been discussing these for the 5 days prior to this, but we feel they clearly understood the difference. They wanted clarity as to the timescales for these potential activities, most assuming it was also 2050

The activities are holistic and seem largely achievable. They seem to be for the greater good for the customer, communities, economy, environment and Thames Water as a whole.

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

The activities are all good though I take issue with the priorities and the 2050 timescale. Some things are missing too as I have explained. It was not a question of these activities being wrong in themselves - they are all worthy but need to be prioritised and developed. There need to be SMART targets - specific, measurable, achievable, realistic and time bonded.

Female, 65+, ABC1, White, Waste-only, South East Water

*In general, the list of activities looks nice but there is no mention of costs or percentages. I am concerned that the most urgent activities will be delayed if all of the activities become goals to be met by 2050. **There is no time scale attached to the activities** either and they are very vaguely or generally worded. Essential activity improvements cannot wait till 2050, and any renewable energy generation, e.g. From sewage processing is very welcome, especially in the current situation and endeavour to become independent from gas and oil imports.*

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

Customer evaluation of goals of Vision 2050

- For the next stage of discussions, customers evaluated each area of Public Value in more depth. Each slide detailed the overarching theme, proposed activity and what this would entail. The 17 activities were shown in a different order for each participant.
- Customers were asked to evaluate and comment on each area of Public Value as follows:
 - For each activity listed below please tell us:
 - How important is each element as a role for Thames Water to fulfil, where 0 is *'not at all an important role for Thames Water to fulfil'* and 10 is a *'very important role for Thames Water to fulfil'*
 - Please give brief reasons for the activities you ranked as most and least important
 - Is there anything you think is missing in this list of customers and communities activities that you would like Thames Water to pursue?

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Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
Keeping rivers clean	Making sure that sewage doesn't harm the quality of water in the environment
Keeping noise to a minimum	Protecting customers from noisy Thames Water activities such as roadworks or water and sewage treatment processes

Customers and communities

Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
Minimising transport disruption	Protecting customers from road or railway disruption that Thames Water activities may cause

Capability, employees and essential services

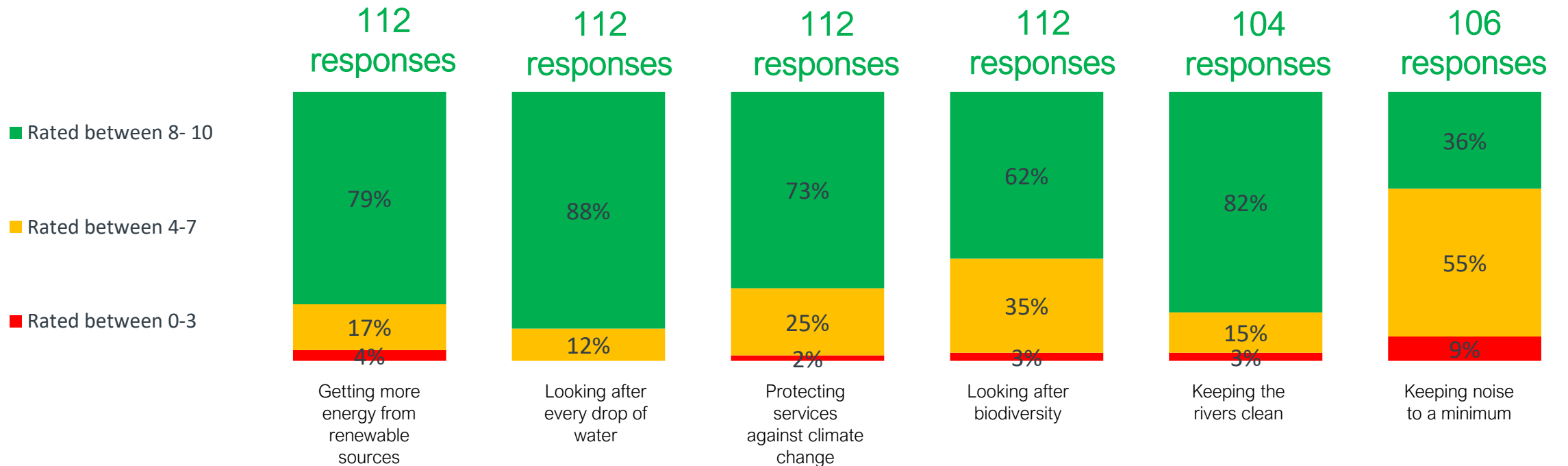
Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment

The environment

Activity	More about this
Getting more energy from renewable sources	Getting more of our energy from renewable sources (such as the sewage treatment process and solar panels and wind turbines on sites)
Looking after every drop of water	Limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains, and making sure water is used efficiently by all customers
Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
Keeping rivers clean	Making sure that sewage doesn't harm the quality of water in the environment
Keeping noise to a minimum	Protecting customers from noisy Thames Water activities such as roadworks or water and sewage treatment processes

Customers rate most of the environment activities highly, with water supply protection seen as the most important area by customers, with less focus on biodiversity and noise reduction

Participants ranked how important they felt each public value element was to fulfill on a scale of 0-10 , where 0 is 'not at all an important role for Thames Water to fulfil' and 10 is a 'very important role for Thames Water to fulfil'



Although most of the environment activities are rated highly, protecting water ranks highest

Meanwhile, noise reduction is seen as less of a problem, and unimportant to 'fix'

Protecting every drop is rated the most important activity, core to Thames Water's remit

Protecting water sources appears most relevant to Thames Water for customers, with them seeing this as key to future sustainability and efficiency. Although some aren't convinced this is completely achievable to protect 'every' drop, customers feel that this activity will help Thames Water reduce damage to the environment,

Keeping the rivers clean features as an important goal throughout

Although not the highest scoring goal in the qualitative stage, this is still clearly an important issue (and is the highest scoring goal in the quantitative data). It is largely driven by a desire to ensure wildlife and human health is protected – wildlife in particular contributing to biodiversity.

Keeping noise to a minimum is the lowest rated activity for importance

Keeping noise to a minimum is rated lower due to many seeing it as either unlikely to cause much disruption, or being a short-term pain. This is something customers expect, however unwelcome it is.

Customers feel this set of activities are right

Customers feel the current selection covers the spectrum of environmental issues, although some feel this is the space to talk about reducing sewage spills. Besides this, some customers suggest that Thames Water should play an educational role in water sustainability and efficiency.

I ranked looking after every drop of water as one of my highest because when used more sustainably, Thames water will need to do less to prepare and this contributes to less damage to the environment.

Male, 35-44, C2DE, White, Waste-only, Affinity Water

Definitely a high score for this, 10/10. If rivers aren't kept clean there are knock on effects to other aims and roles of TW, e.g. improving biodiversity and fines incurred will be reflected in increased customer bills.

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

Ultimately, if there is not enough water to go around because it has not been used appropriately, Thames Water has no business and we won't have enough water to drink. In terms of keeping rivers clean, if this does not happen then this could cause untold damage to the environment and even human health.

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

I keep harping on about education as if we are not given the tools and taught how to save water then how can we do it. Or how about collecting rain water from our streets when it rains ? is there anyway they can do this.

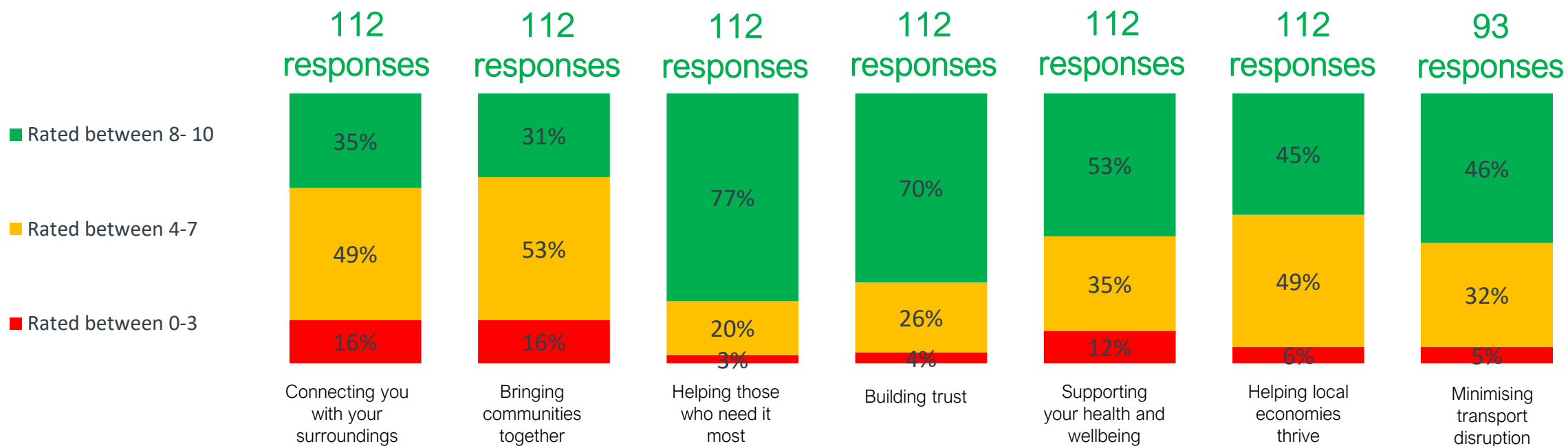
Female, 45-54, ABC1, Business, 10-49 employees

Customers and communities

Activity	More about this
Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
Minimising transport disruption	Protecting customers from road or railway disruption that Thames Water activities may cause

Customers rate targeted support for those in need and building trust as the most important customer and community activities to focus on, with wider community initiatives seen as less important

Participants ranked how important they felt each public value element was to fulfill on a scale of 0-10 , where 0 is 'not at all an important role for Thames Water to fulfil' and 10 is a 'very important role for Thames Water to fulfil'



Helping those who need it most is rated highly as a customer and community activity

In contrast, customers feel that it is not within Thames Water's remit to bring communities together

Helping those who need it is seen to proactively support vulnerable customers

Customers rate this highly, largely because it offers a more focused and achievable support measure for customers who need it the most. Many customers feel Thames Water has a responsibility to support vulnerable customers who can't afford bills, as water should be accessible and available for all.

Although most feel community goals are important, some aren't convinced this is an area Thames Water should be focusing on

Largely, customers feel this is a 'nice' thing to do, albeit something that shouldn't be a priority for Thames Water given both their core water treatment remit and the list of other initiatives they want to implement.

Although many feel the list of activities under Customer and Community cover all relevant areas, some are interested in ways Thames Water can work with local businesses and communities to educate and improve

Some customers feel Thames Water could work proactively with local businesses and organisations (like schools) in order to achieve goals faster and bring improvements to local areas with more specialised/targeted support. Similarly, some feel that Thames Water can play an educational role, and so should support schools to teach children about the water cycle and treatment process.

The most important is helping customers who need it most, as vulnerable customers should not be forgotten or have to suffer financially/with service because of factors out of their control.

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

I think community is important but don't feel this is a particularly important role for Thames Water to take on and I don't think it's going to benefit as many people as providing outdoor facilities and space to enjoy.

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

Working with schools to provide education and information centres for young people to visit, so they understand and can be educated with the work that goes into providing water and hopefully this may have long term impacts on that generation saving water and not abusing it.

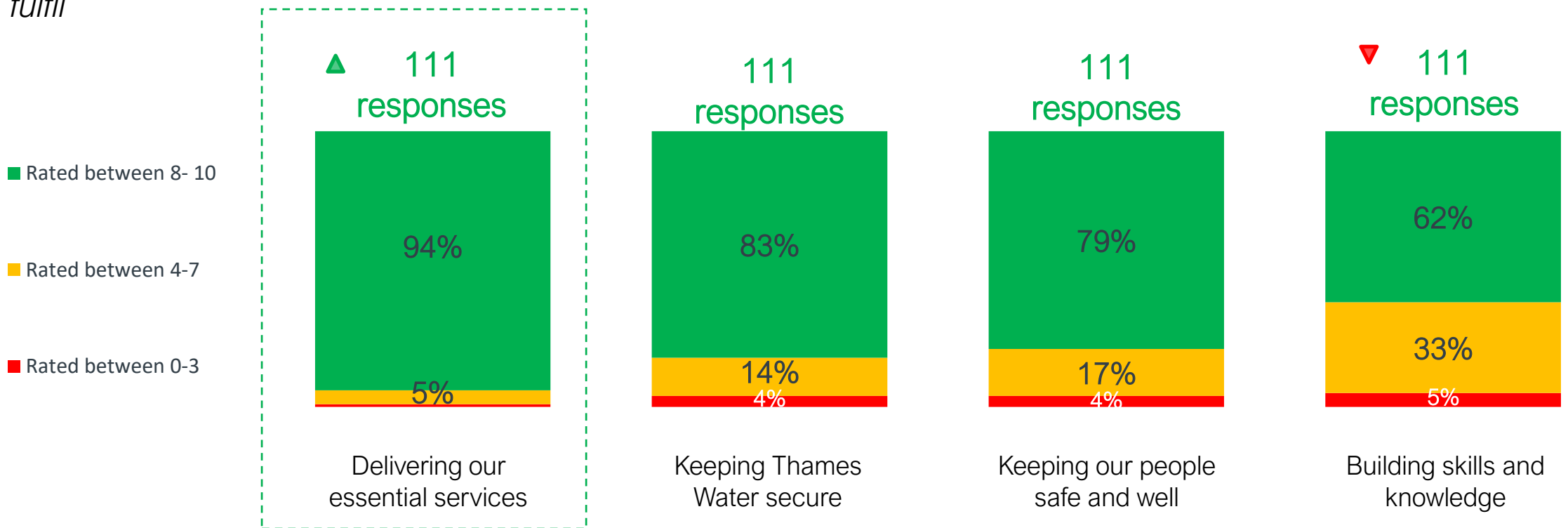
Male, 45-54, ABC1, BAME, Dual, London

Capability, employees and essential services

Activity	More about this
Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment

For most, providing drinking water, taking away and treating wastewater and returning it safely to the environment is the most important activity for Thames Water to fulfil

Participants ranked how important they felt each public value element was to fulfill on a scale of 0-10, where 0 is 'not at all an important role for Thames Water to fulfil' and 10 is a 'very important role for Thames Water to fulfil'



▲ ▼ = Significant difference at 95% confidence level

Caution, the percentages shown on this page are based on a relatively small qualitative sample size, they are shown to indicate direction of sentiment only

All the capability, employee and essential service activities are considered important, yet providing essential services is the top priority Thames Water should focus on

Many believe that guaranteeing clean and drinking water, and treating wastewater are essential activities for Thames Water. Keeping customers safe and employees safe are also seen as highly important.

Providing essential services is the top priority for many

Customers feel that *guaranteeing clean and drinking water to customers*, as well as, *treating wastewater* are the most important activities Thames Water should carry out as a water and waste supply company.

Keep customers and employees safe and well, as well as, building skills and knowledge among employees are important mainly to build customers' confidence in Thames Water

Keeping people safe and well is ranked lower than essential services but is still considered an ethical obligation by many. They believe that if things like this were to be broken, it would likely affect other important issues like data protection and water contamination.

Building skills and knowledge across the workforce is felt to be quite important as well to guarantee an ongoing high-quality service and to develop and apply new technology. However, it is felt to be less of a priority for Thames Water, which, according to customers, could rely on third parties to fulfill this measure.

What is missing? Any other ideas?

Customers would like to know more about Thames Water's plans to develop skills and knowledge among employees and would like to see them more committed in diversifying the workforce.

Most = Delivering our essential services. This in my view is the top priority which Thames Water should be focusing on. Everyone needs water which is clean and I expect wastewater to be treated accordingly

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

It's important to have skilled workforce. The better they are trained will ensure quality of work. Security is important for the safety of data as well as preventing contamination from outside sources. High maintenance will ensure the health and safety of everyone and everything. Delivery of essential services goes without saying. Water is a lifeline for all living things

Female, 55-64, C2DE, BAME, Waste-only, Affinity Water

The essential service is exactly that, what customers pay for and that is of most importance. Also important is keeping the sites free from security threats. That has the potential to harm countless customers so is a vital element for them. I ranked building skills the lowest - that is important for staff to know what they are doing but most people go into a job having already been trained in some way i.e. via education so it is not a huge area Thames Water should focus on. Keeping staff safe and well is very important but essential services are more important than this.

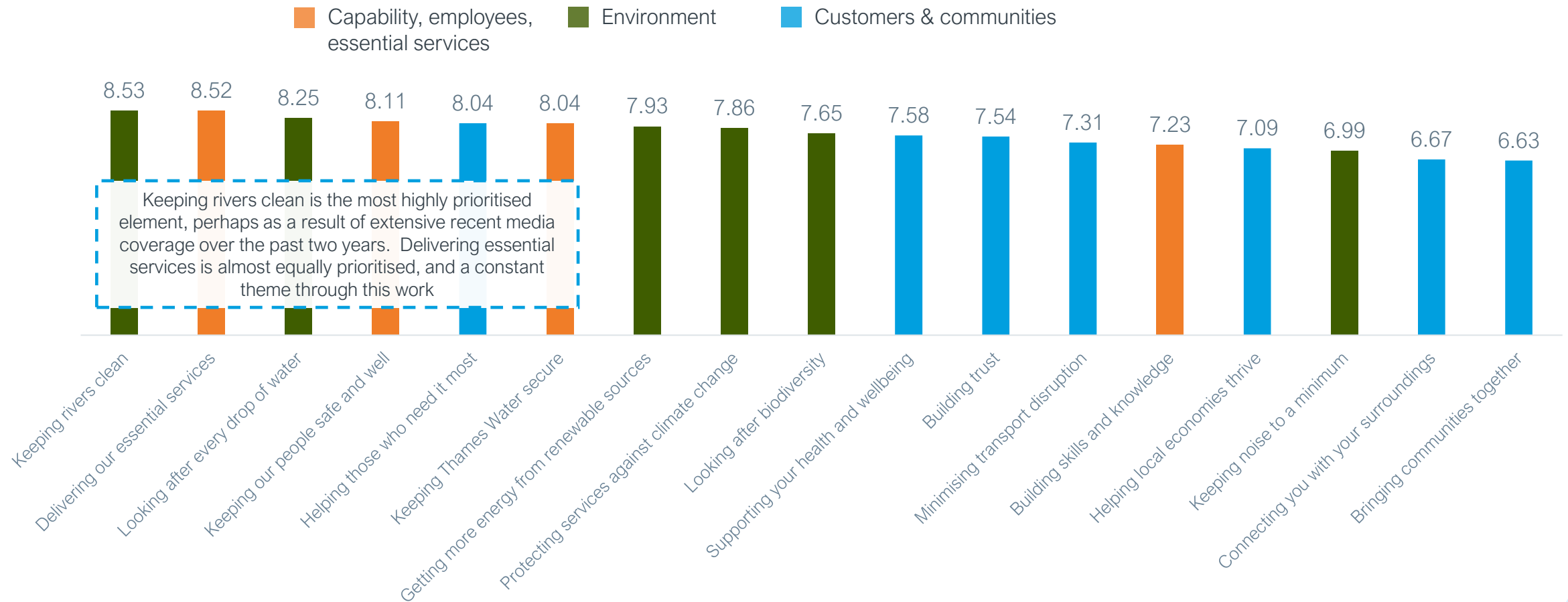
Female, 25-34, ABC1, White, Dual, Swindon/Oxford



Quantitative findings: overall priority for
each element of the Public Value
framework

River cleanliness and delivery of essential services are the key priorities overall

Public value; overall priority for each element (All informed qual and uninformed quant responses - 698)

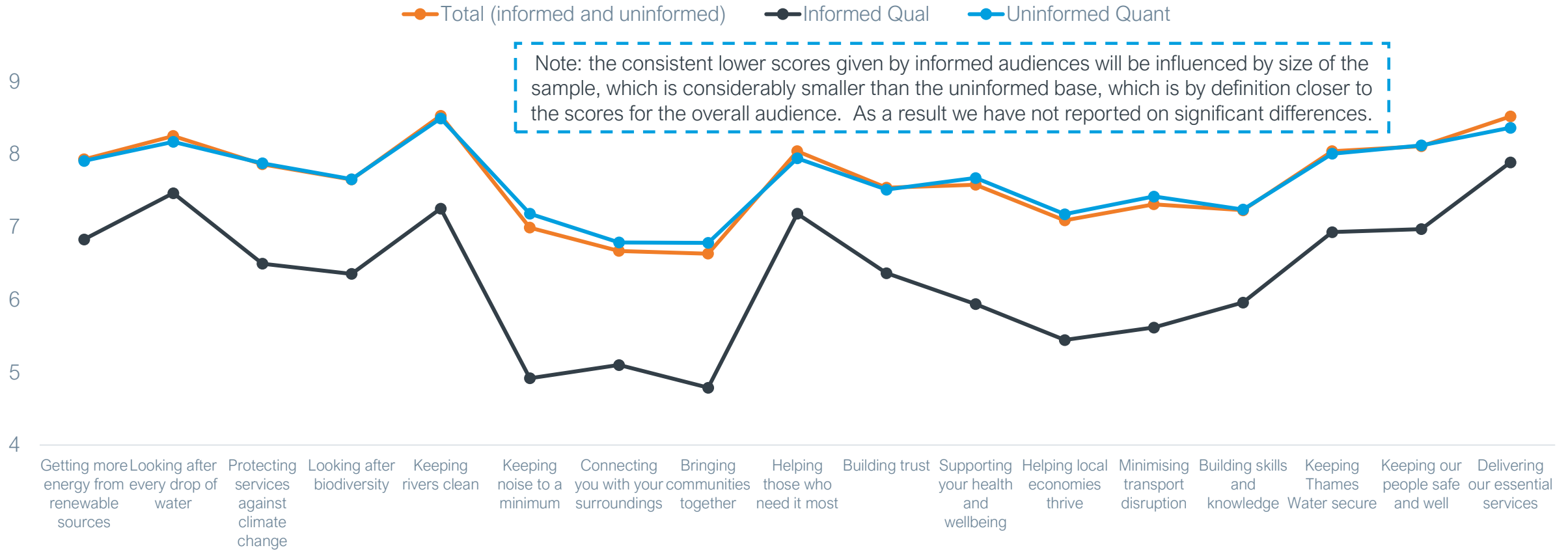


Prioritisation of Public Value elements and differences between the informed qualitative and uninformed quantitative participants

- The **informed qualitative** participants offer consistently lower mean scores than the **uninformed quantitative** participants, but scores are closer to the overall total audience mean for the following elements:
 - ‘Delivering our essential services’
 - ‘Looking after every drop of water’
 - ‘Helping those that need it most’
- This does tend to suggest a deliberate deprioritisation of the less tangible elements, given that they show the biggest divergence from the overall mean compared with the uninformed audience
- Those areas showing the biggest gap between informed and uninformed audiences are:
 - ‘Keeping noise to a minimum’
 - ‘Connecting you with your surrounding’
 - ‘Bringing communities together’
 - ‘Supporting your health and wellbeing’
 - ‘Helping local economies thrive’
 - ‘Minimising transport disruption’

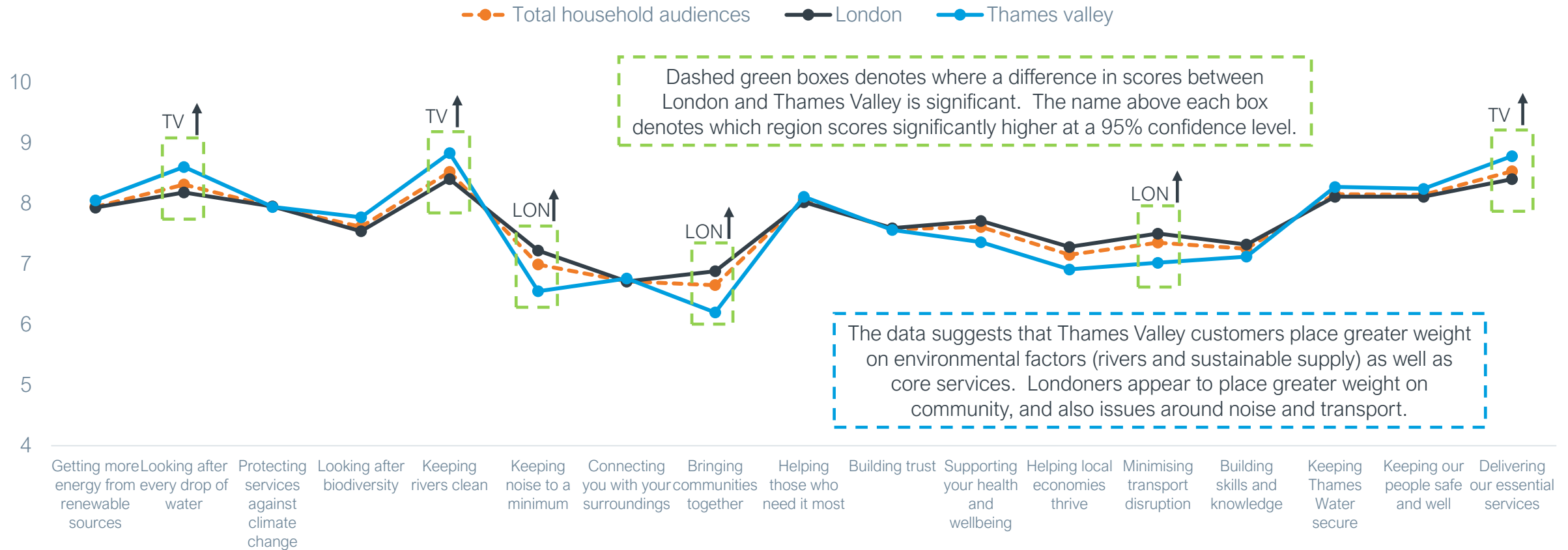
Informed audiences provide lower scores across the board for Public Value elements

Public value; overall priority for each element (All responses – 698)



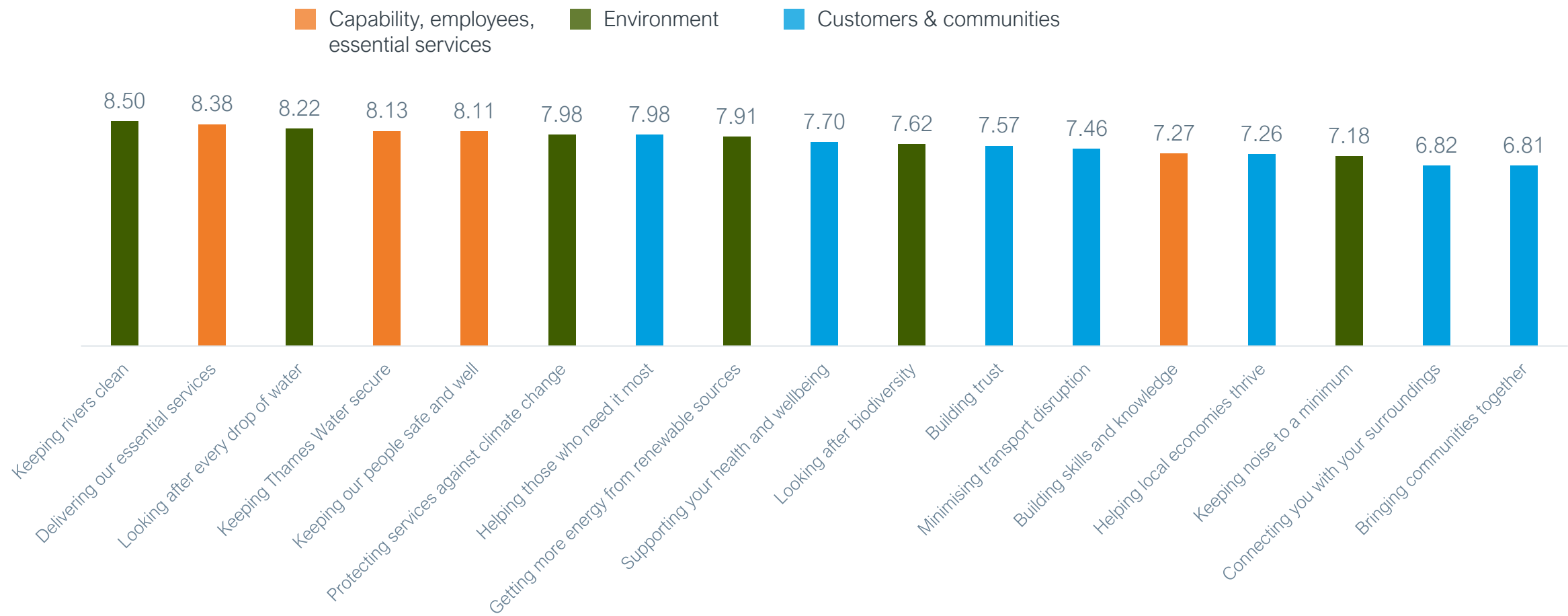
There are some significant differences in priorities between London and Thames Valley household customers

Public value; overall priority for each element (All informed and uninformed household responses – 698)



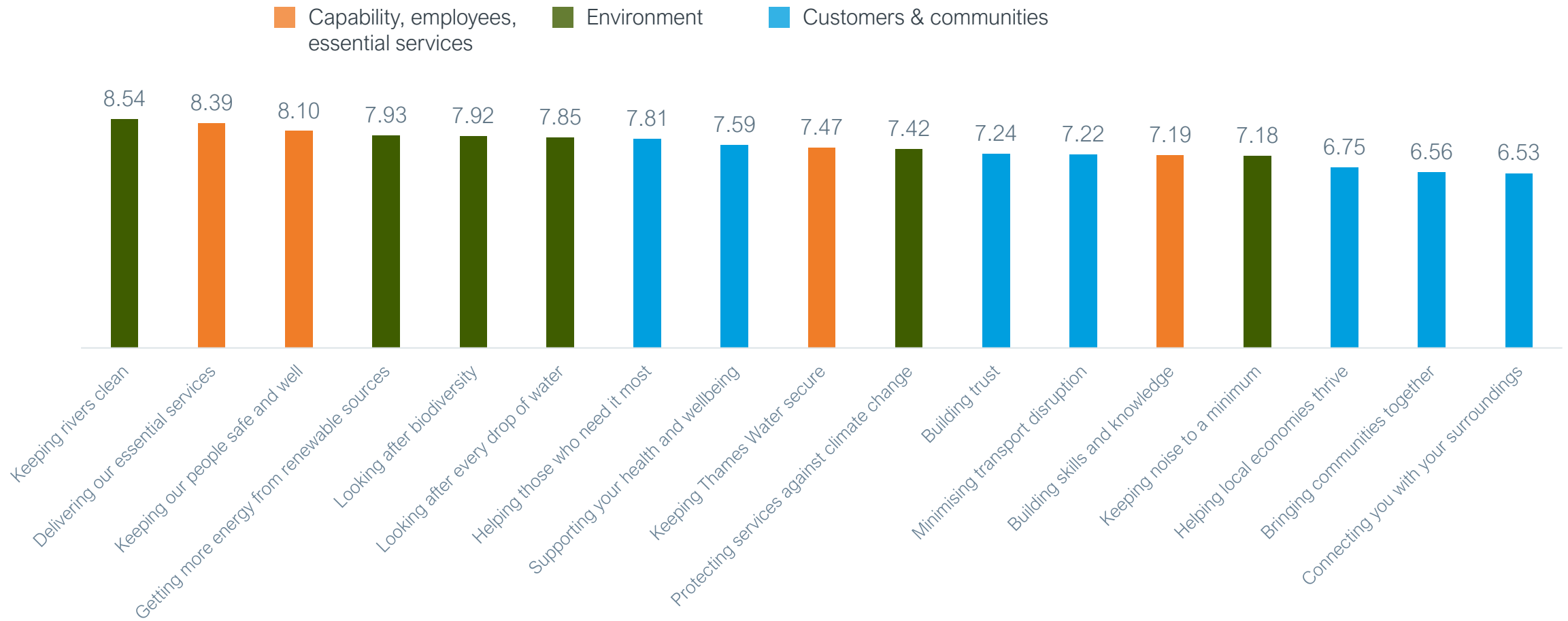
Uninformed household participants - keeping rivers clean and delivery of essential services are the key priorities, as well as protecting the water supply

Public value; overall priority for each element (Uninformed HH quant - 500)



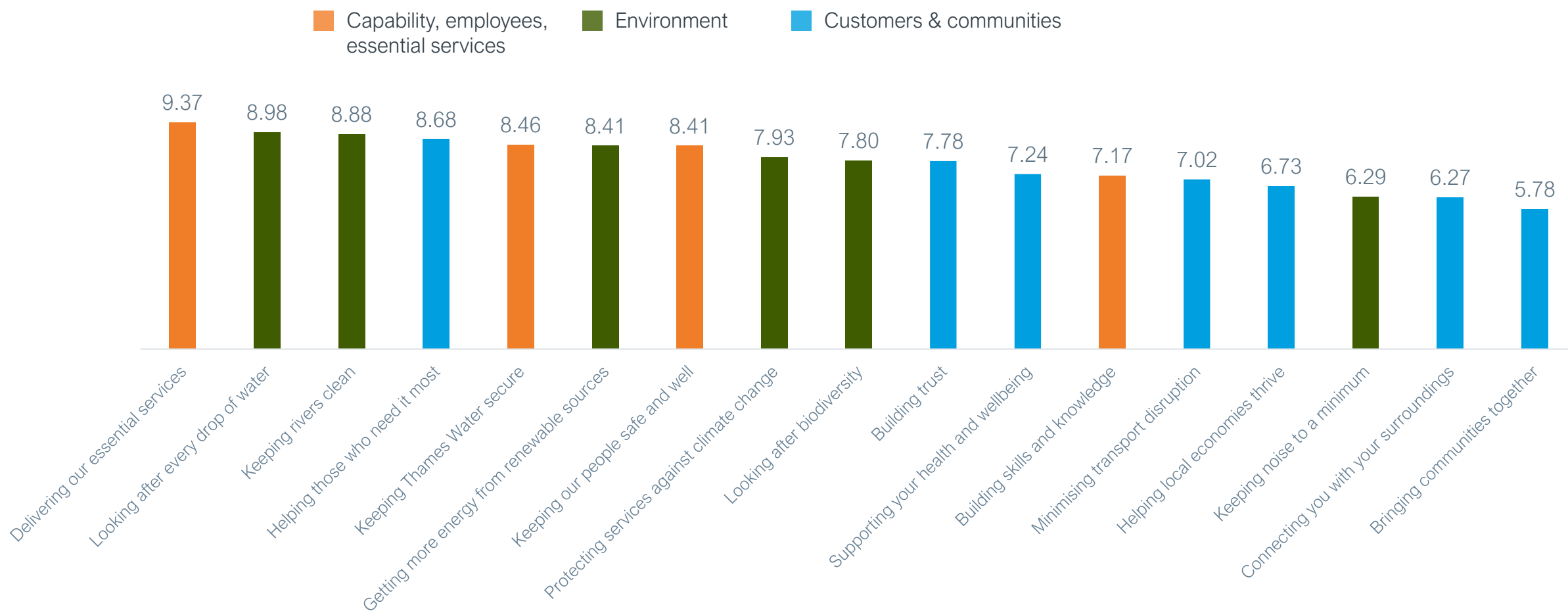
Uninformed non-household participants - keeping rivers clean and delivery of essential services are also key, as well as keeping our people safe

Public value; overall priority for each element (Uninformed NHH quant - 100)



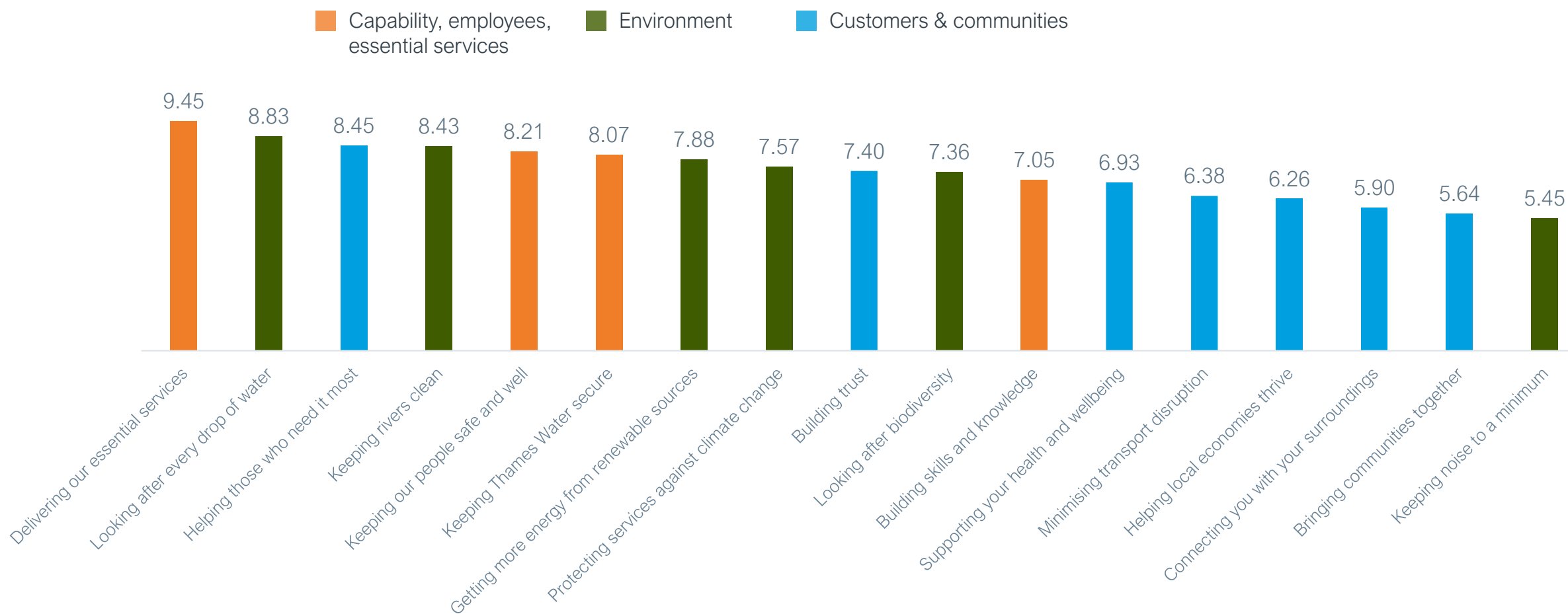
Informed panel participants - there is more range in the scores given by these, and delivery of essential services is key for them

Public value; overall priority for each element (Informed panel – 50)



Informed 'fresh' participants - there are also wider-ranging scores among this group, with priority also given to delivering essential services

Public value; overall priority for each element (Informed fresh – 49, includes business and future bill payer customers)



Significantly higher priority scores for Public Value activities are most likely among uninformed household customers (quantitative survey)

Priority of Public Value activities : differences between sample types

▲ Sig difference at 95% CI
▼

Public Value activity	Uninformed HH	Informed panel	Informed fresh	Uninformed NHH
Getting more energy from renewable sources	7.91	8.41	7.88	7.93
Looking after every drop of water	8.22 ▼	8.98 ▲	8.83 ▲	7.85 ▼
Protecting services against climate change	7.98 ▲	7.93	7.57	7.42 ▼
Looking after biodiversity	7.62	7.80	7.36	7.92
Keeping rivers clean	8.50	8.88	8.43	8.54
Keeping noise to a minimum	7.18 ▲	6.29 ▼	5.45 ▼	7.18 ▲
Connecting you with your surroundings	6.82 ▲	6.27	5.90 ▼	6.53
Bringing communities together	6.81 ▲	5.78 ▼	5.64 ▼	6.56
Helping those who need it most	7.98 ▼	8.68 ▲	8.45	7.81 ▼
Building trust	7.57	7.78	7.40	7.24
Supporting your health and wellbeing	7.70	7.24	6.93	7.59
Helping local economies thrive	7.26 ▲	6.73	6.26 ▼	6.75
Minimising transport disruption	7.46 ▲	7.02	6.38 ▼	7.22
Building skills and knowledge	7.27	7.17	7.05	7.19
Keeping Thames Water secure	8.13 ▲	8.46 ▲	8.07	7.47 ▼
Keeping our people safe and well	8.11	8.41	8.21	8.10
Delivering our essential services	8.38 ▼	9.37 ▲	9.45 ▲	8.39 ▼

A6 - Thinking about all the activities that you've just reviewed, we'd like you to rate all of them in terms of how much priority you want Thames Water to allocate to each in the coming years, on a scale of 0-10, where 0 is 'no priority at all' and 10 is 'very high priority'? Base: All respondents (698)

Very few significant differences by subgroups in terms of priority ratings for Public Value activities

Priority of Public Value activities: subgroup differences

Gender

Women gave significantly higher priority scores than men for:

- Getting more energy from renewable sources
- Protecting services against climate change
- Helping those who need it most
- Keeping Thames Water secure

Age

Significantly higher importance scores typically given by customers aged 35+ for:

- Looking after every drop of water
- Keeping rivers clean
- Helping those who need it most
- Keeping Thames Water secure
- Keeping our people safe and well
- Delivering our essential services

Service type

dual service customers gave significantly higher importance scores for:

- Getting more energy from renewable sources
- Protecting services against climate change

Very few significant differences by subgroups in terms of priority ratings for Public Value activities

Priority of Public Value activities: subgroup differences

Location

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

- Looking after every drop of water
- Keeping rivers clean

London customers gave significantly higher priority scores for:

- Bringing communities together
- Minimising transport disruption
- Delivering our essential services

Ethnicity

White customers gave significantly higher priority scores for:

- Keeping rivers clean
- Delivering our essential services

BME customers gave significantly higher priority scores for:

- Bringing communities together
- Helping local economies thrive

Disability

No significant differences by disability

Appendix

Methodology and sampling details

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 (698 for the final Public Value survey question posed to both informed and uninformed audiences)

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 builds upon previous insights to understand what customers want from Thames Water in the near and longer term. The public value framework was developed from previous customer insight. This research falls into a wider body of insight gathering aimed to understand what customers want from Thames Water in the longer term.</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 public value framework. They were provided with details to help them make judgements on the seventeen public value activities, including a contextual description about each topic. 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.</p> <p>Comprehension of the 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 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>

Appendix

Research materials

Screeener

Screenener



Thames Water
Customer Voices 

JOB NUMBER: 6253

PROJECT: Vision 2050 and Public Value research

QUESTIONNAIRE VERSION: V1

DATE: 23/12/2021



Thames Water
Customer Voices 

SPECIFICATIONS:

Scripting specifications			
Job code	6253	Project (wave/stage if applicable)	Thames Water
Market and Languages	UK, English Only		
Sample source	Customer Voices	If 'Client List', specify pipe ins	
Stimulus path	n/a		
Scripting tools	n/a		
Member Sat Qs	No		
Target Criteria	Thames water customers		
Hard Quota table – for 3 rd party sample only.			
Overall Target	Total n=100		
	Code name	Target %	Target
Customer Type			
3 rd party re-directs – PM to add for external sample provider projects			

Invitation	
Subject line	New research activity available
Pre header	Take part in important research to shape Thames Water's strategy
Dear xxx,	
We are looking for people to take part in an exclusive research project where we will be asking for members to give their opinions on some important topics in relation to Thames Water's planning for the next few decades.	
The research will involve logging into a platform where we will ask you to read some information on a variety of topics and share which you think are the most important.	
The community will be open for six days, starting on March 30 th and closing on April 7 th (with a weekend and a 'break' day on Tuesday 5 th to give you time to respond to everything).	



Thames Water
Customer Voices 

Once the research is complete, we may ask if you wish to submit a short video about your overall thoughts on the research. This would be optional, though you would receive a small payment in return for your time. We will be in touch about this if you complete the research.

The activities should take no more than 30-45 minutes per day and everyone who completes all the activities will receive an £80 VEX voucher (which can be used with over 150 High Street brands).

[Click here to register your interest if you would like to take part](#)

Regards

Claire, Customer Voices Community Manager

QUESTIONNAIRE:

INTRO TEXT

Thank you for your interest in taking part in our research on the topic of Thames Water's strategic plans going forward.

Please click below to get started...

NEW PAGE:

SECTION A – SCREENING

PIPE IN FROM CUSTOMER VOICES

- Gender
- Age
- Ethnicity
- Employment Status
- Location
- Clean and wastewater/ wastewater only
- Vulnerable
- NPS

ASK ALL

A1a. We are looking for people to take part in a piece of research which would involve logging into a text-based community and completing some activities. The activities will involve reading some information and then giving feedback on the topic. The community will run for six days, starting

Screenener



Thames Water
Customer Voices 

on March 30th and closing on April 7th (with a weekend and a 'break' day on Tuesday 5th to give you time to respond to everything).

If you are selected and complete all the activities, you will receive an £80 VEX voucher for your time. We will let you know by January 10th if you have been chosen to take part.

Are you willing and available to take part?

1. Yes, I am free, and I'd like to take part
2. No, I cannot take part **SCREENOUT**

ASK IF A1 = 1

A2. The online discussion community will be hosted by Verve via our trusted third-party supplier, a market research company called Further.

Please note, your email address will be shared with Further, in order for you to be invited to join the community. Comments, activity results, videos and images you choose to upload/share during the community will be held on the Further platform. To read Further's privacy policy please click here [<https://www.go-further.co/privacy>].

We may also share comments, videos and images with Thames Water for internal purposes only. You can read their privacy policy here: <https://www.thameswater.co.uk/legal/privacy-policy>.

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

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

ASK ALL

MULTI CODE, RANDOMISE

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

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

ASK ALL

SINGLE CODE PER STATEMENT. RANDOMISE ORDER OF STATEMENTS, BUT DO NOT RANDOMISE ORDER OF SCALE



Thames Water
Customer Voices 

APPEND RESPONSES TO Q3 2A – Q4 TO PANEL SAMPLE. ASK ALL WHO PREVIOUSLY HAVE NOT ANSWERED THESE QUESTIONS IN 6047 SEWAGE TREATMENT WORKS COMPLIANCE.

Q2a. What is your current employment status?

SINGLE CODE

1. Working full time – 30 hours a week or more (**GO TO Q2B**)
2. Working part time – between 8 and 29 hours a week (**GO TO Q2B**)
3. Self-employed – working 30 hours a week or more (**GO TO Q2B**)
4. Self-employed – working between 8 and 29 hours a week (**GO TO Q2B**)
5. Not working but seeking work or temporarily unemployed or sick
6. Not working and not seeking work
7. Currently on furlough / reduced hours / employer imposed temporary leave of absence as a result of the Coronavirus
8. In full time education
9. Retired
10. Homemaker e.g. housewife, househusband etc
11. Other (please specify) [**HOLD**]

ALL WHO CODE 1 – 4 AT Q2A

Q2b. In your job, are you responsible for dealing with Thames Water or for paying the water and waste bill?

SINGLE CODE

1. Yes (**GO TO Q2C**)
2. No (**GO TO Q3**)

ALL WHO CODE 1 AT Q2B

Q2c. What is the main activity of the organisation you work for?

SINGLE CODE

1. Construction, mining, manufacturing, agriculture
2. Wholesale, retail, repair motor vehicles, transportation
3. Accommodation and food service activities
4. Services – information, financial, real estate, professional, scientific, technical activities, advice and support
5. Public organisation, education, health and social work activities
6. Other services

ALL WHO CODE 1 AT Q2B

Q2d. How many workers (permanent and temporary) are there at your organisation?

1. 0 – only you / self-employed
2. 1-9 employees
3. 10-49 employees
4. 50-99 employees
5. 100-249 employees
6. 250-499 employees
7. 500+ employees

ALL WHO CODE 1 AT Q2B

Q2e. As a proportion of your organisations' outgoings, how much does it spend on water?



Thames Water
Customer Voices 

1. Less than 5% of outgoings spent on water
2. More than 5% of outgoings spent on water
3. Don't know

ASK ALL, MULTICODE, RANDOMISE

Q3. Which of the following have you done in the past 5 years?

1. Cleaned up your street or took part in a cleaner streets campaign
2. Reported a problem to the council such as fly tipping, broken paving or street-lamps that don't work
3. Campaigned on a local issue such as reducing speed limits on local roads
4. Campaigned for environmental initiatives
5. Volunteered for local charities or events
6. Raised funds for a local charity or cause
7. Take an active part in a local society or community group (including PTA, scouts etc)
8. Are involved with the local council (either an elected role or in a clerical capacity)
9. Are involved in running a local sports club (e.g. coach a kid's sports team)
10. None of the above (**ANCHOR, EXCLUSIVE**)

ASK ALL, MULTICODE, RANDOMISE

Q4. Which of the following apply to you?

1. I have taken part in cleaning up my street or have taken part in a cleaner streets campaign in the last 12 months
2. I regularly take part in a green gym (gardening activities that benefit the community)
3. I have recently been involved in a planting event (e.g. planting trees or helping maintain the local natural environment)
4. I am a member or donate regularly to an environmental or wildlife charity?
5. I take part in outdoor sports or activity in a natural water environment (e.g. fishing, surfing, paddle boarding, rowing, wild swimming etc)
6. I have actively researched in some detail the environmental impact of flooding/water quality
7. I have campaigned or raised money for a local environmental issue in the last two years
8. I am disciplined about researching and using companies and products that are kind to the environment
9. I eat ethically (e.g. have become a vegetarian/vegan, buy local or sustainable foods) for environmental reasons
10. I have invested in renewable energy for environmental reasons (e.g. solar panels)
11. I have invested in ways to reduce water wastage in my home for environmental reasons (e.g. installed water saving shower heads or flow restrictors)
12. None of the above (**ANCHOR, EXCLUSIVE**)

ASK IF NO APPENDED DATA, MULTICODE, RANDOMISE

Screenener



Thames Water
Customer Voices 

NPS. If you were able to choose your water provider, how likely is it that you would recommend Thames Water to a friend or family member? On a scale of 0 to 10 where 0 is not at all likely and 10 is extremely likely.

[SINGLE CODE – SCALE FROM 0-10]

HIDDEN VARIABLE 'NPS GROUP':

1. Super detractors (0-4)
2. Detractors (5-6)
3. Passives (7-8)
4. Promoters (9-10)

END / SCREENSHOT TEXT

Thank you for your time today. Unfortunately, you won't be able to join us on this community. Thank you for taking the time to feedback. We will be doing many more research projects soon, so please keep an eye out for more research project invitations in the near future.

COMPLETE MESSAGE

Thank you for expressing an interest in our research.

Please note places are limited, so unfortunately, we cannot invite everyone to take part. We will be in touch by March 28th if you have been selected to take part in the next stage, so please keep an eye on your inbox, including your junk-mail folders.

Invite email

Subject line	Congratulations! You have been selected to take part in the next stage of our research project for Thames Water
Pre header	A four-day online pop-up community

Hi xxx,

Thank you for agreeing to taking part in our exclusive research project for Thames Water, we really appreciate you taking the time to join us!

We are very pleased to confirm you have been selected for the next stage our research project and we would like to invite you to our pop-up community.

The community will run for six days, starting on March 30th and closing on April 7th (with a weekend and a 'break' day on Tuesday 5th to give you time to respond to everything).

During the research we will be asking you about Thames Water and environmental initiatives, you'll also be asked to evaluate some material we'll be showing you. Your contribution will directly influence the decisions that Thames Water may take. You will also receive a £80 VEX voucher for completing all of the tasks.

As mentioned to you previously, Comments, activity results, videos and images you choose to upload/share during the community will be held on the Further platform. To read Further's



Thames Water
Customer Voices 

privacy policy please click [here](#). We may also share comments, videos and images with Thames Water for internal purposes only. You can read their privacy policy [here](#).

Join Further platform: [insert link](#)

Your community moderators will be Ronan, Jodie, Sabrina and Graham – experienced colleagues from consumer insight agency Verve.

If you have any questions about this community or the goal of this research project, please send an email to Ronan at R.Hegarty@addverve.com or Graham at G.Brown@addverve.com

If you have any questions about the incentive offered for this project or when it will be sent, please contact us at claire@vervevoices.co.uk

Many thanks,
Claire, Customer Voices Community Manager

Qualitative Discussion Guide

Day 1: Introduction to the research and your expectations of Thames Water

Welcome to the community

- Before we begin, we thought it would be important to tell you a bit more about this research.
- Thames Water is committed to meeting the needs of its customers now and in the future. We will be discussing Thames Water's vision for 2050 which is being planned to make significant changes and improvements to the service provided in the future, while tackling challenges that the future may bring with a changing climate, population and economy. We are looking for your feedback on Thames Water's long term plans in this area.
- All of your feedback will be taken account of in a report written by Verve, and Thames Water will then use this to help build their future plans.
- If you have any questions about this research, please don't hesitate to drop us a line.

**Future customer welcome*- Over the next few days we want to learn about what you expect of Thames Water and what you think of their 2050 vision and the proposed initiatives to achieve this. We know that you're not a paying customer right now but please base your answers as though you would be (because you may be a bill payer in the not too distant future!)*

**Business welcome*- Welcome to the community! Over the next few days we want to learn about your views on Thames Water's 2050 vision, the proposed initiatives to get there and tell us what this means for you and your business. Where possible, please try and answer from a business perspective.*

Day 1: Introduction to the research and your expectations of Thames Water

Question 1. 1 (Introductions and what you expect of Thames Water)

- When you think about Thames Water, and all the activities you are aware that they are involved in, what do you really want from Thames Water? What things are most important to you?
- Do you ever talk to others (family, friends, neighbours) about Thames Water, or hear about them on social media, radio, TV or newspapers?
- Have you seen or heard anything about Thames Water from these sources that has changed what you think is important for Thames Water to do?
- What would you like to see from Thames Water in the future? This could be anything related to what they currently do, or new/different things you'd like to see them do.

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

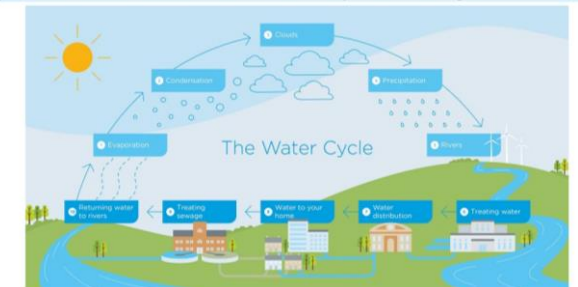
Now we'd like to tell you more about the scope of Thames Water's responsibility and how water gets to you and sewage is removed from your property:

Question 1. 2 (Facts about Thames Water and the water cycle)

- 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 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.



Day 6: Public Value

Welcome to the final day of the community. Thank you for everything so far!

Today we're going to think about things a bit differently. So far we've talked about Thames Water's vision for 2050 and all the different things it could do for customers.

Today we'll be thinking about, on the one hand Thames Water's core service, which is supplying drinking water, removing wastewater from homes and businesses and managing your account and bills. And on the other hand, there are other beneficial things it could do for customers, communities and the environment. For example:

- Added benefits from how the main service is delivered, such as using natural solutions for sewage treatment which benefits wildlife.
 - Or there could be extra activities that make a positive difference to customers, communities and the environment, above and beyond the main service. For example developing renewable energy at sewage treatment works.
- You should bear in mind that Thames Water funds all its activities using money from customers' bills. So, it's important that all of Thames Water's activities are things that customers actually want. This is what we'll be discussing with you today.

As a reminder, the core activities include the water and wastewater service and managing your account and bills.

Question 6. 1 (Should Thames Water contribute to society)

What else, if anything, do you think Thames Water could do to make a positive difference for each the following:

- You
- Other customers who receive Thames Water's service
- Your community
- Wider society and the economy
- The environment

Day 6: Public Value

We would now like to show you some activities that Thames Water could do to bring wider benefits for customers, communities and the environment.

Question 6.2 (Introduction to Thames Water’s plan to help wider society)

- What are your initial impressions of these activities?
- Are there any activities that you feel are outside of Thames Water’s remit, things they shouldn’t get involved in or that sound too ambitious for them? Please say why?
- Are there any activities you expect them to do in their role as a water and wastewater company? Why?
- As an overall plan for Thames Water to be ‘a force for good’ would you support or oppose this list of activities?
- Why do you say that?

The environment

Activity	More about this
Getting more energy from renewable sources	Cutting more of our energy from renewable sources (such as the sewage treatment process and solar panels and wind turbines on sites)
Looking after every drop of water	Limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains, and making sure water is used efficiently by all customers
Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
Keeping rivers clean	Making sure that sewage doesn’t harm the quality of water in the environment
Keeping noise to a minimum	Protecting customers from noisy Thames Water activities such as roadworks or water and sewage treatment processes

Customers and communities

Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
Minimising transport disruption	Protecting customers from road or railway disruption that Thames Water activities may cause

Capability, employees and essential services

Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment

Day 6: Public Value

Question 6.3- 6.5

Let's look at the [each group of] activities.

- For each activity listed below please tell us:
- How important is each element as a role for Thames Water to fulfil, where 0 is 'not at all an important role for Thames Water to fulfil' and 10 is a 'very important role for Thames Water to fulfil'
- Please give brief reasons for the activities you ranked as most and least important
- Is there anything you think is missing in this list of environment activities that you would like Thames Water to pursue?
- **Intro to Public Value measures – SHOW ON SCREEN ON ITS OWN**
- We would now like to show you some activities that Thames Water could do to give wider benefits for customers, communities and the environment. Some of these wider benefits could come from how Thames Water deliver the existing water and sewage services, for example using natural solutions for sewage treatment which benefits wildlife. Other benefits could come from additional activities such as developing renewable energy at sewage treatment works.
- It's important that you remember that Thames Water fund their activities using money from customers' bills.
- Please read through all of the following information.

Day 6: Intro to Public Value measures

- A6. Thinking about all the activities that you've just reviewed, we'd like you to rate all of them in terms of how much priority you want Thames Water to allocate to each in the coming years, on a scale of 0-10, where 0 is 'no priority at all' and 10 is 'very high priority'?
- Getting more energy from renewable sources
- Looking after every drop of water
- Protecting services against climate change
- Looking after biodiversity
- Keeping rivers clean
- Keeping noise to a minimum
- Connecting you with your surroundings
- Bringing communities together
- Helping those who need it most
- Building trust
- Supporting your health and wellbeing
- Helping local economies thrive
- Minimising transport disruption
- Building skills and knowledge
- Keeping Thames Water secure
- Keeping our people safe and well
- Delivering our essential services

The environment

Activity	More about this
Getting more energy from renewable sources	Getting more of our energy from renewable sources (such as the sewage treatment process and solar panels and wind turbines on sites)
Looking after every drop of water	Limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains, and making sure water is used efficiently by all customers
Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
Keeping rivers clean	Making sure that sewage doesn't harm the quality of water in the environment
Keeping noise to a minimum	Protecting customers from noisy Thames Water activities such as roadworks or water and sewage treatment processes

Customers and communities

Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
Minimising transport disruption	Protecting customers from road or railway disruption that Thames Water activities may cause

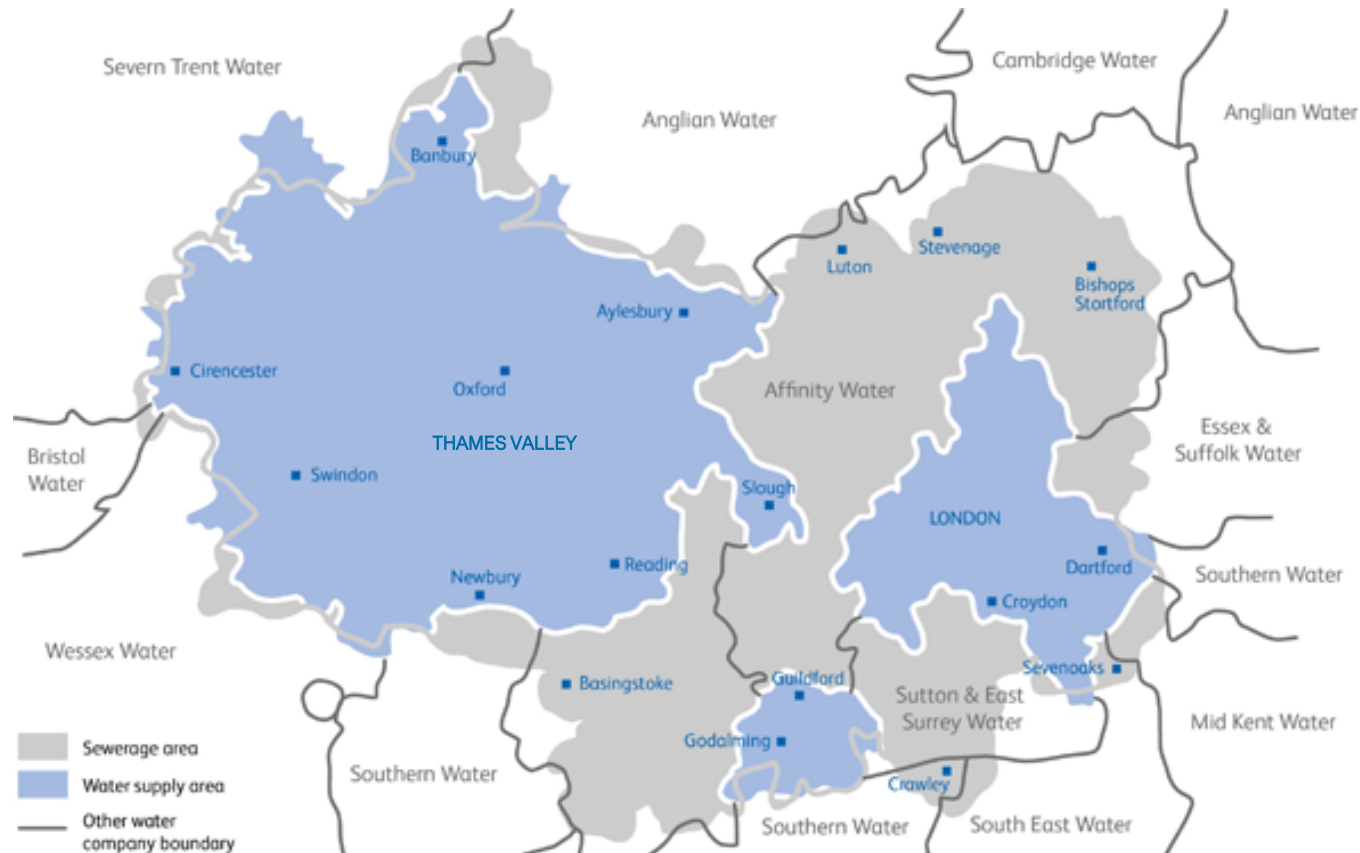
Capability, employees and essential services

Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment



Qualitative stimulus

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



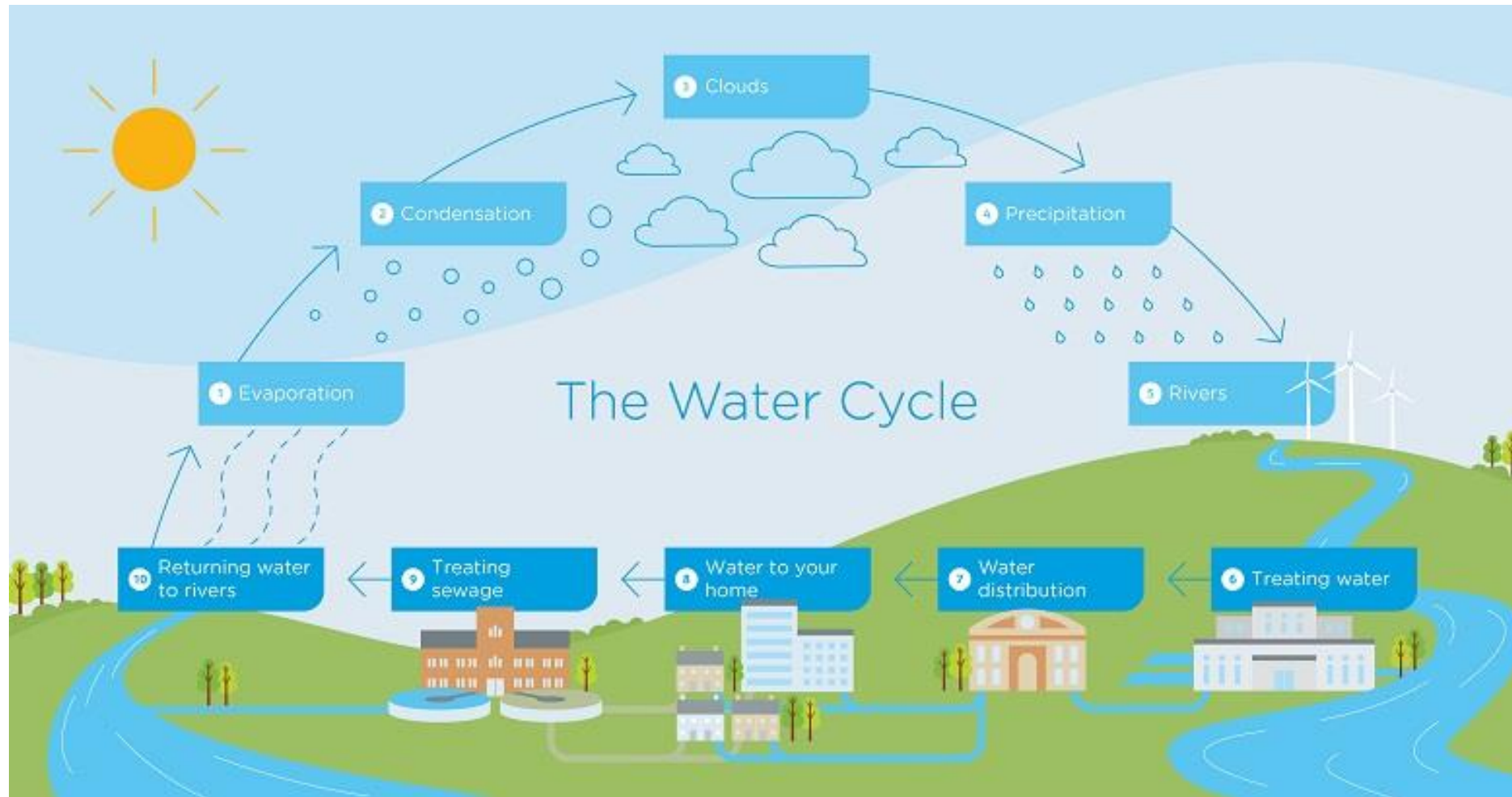
10 million
water
customers

15 million
wastewater
customers

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

Thames Water and the water cycle

Thames Water 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.



Qualitative stimulus: Public value activities

The environment

Activity	More about this
Getting more energy from renewable sources	Getting more of our energy from renewable sources (such as the sewage treatment process and solar panels and wind turbines on sites)
Looking after every drop of water	Limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains, and making sure water is used efficiently by all customers
Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
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Customers and communities

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Capability, employees and essential services

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Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment

Quantitative questionnaire



PROJECT: Vision 2050 and Public Value

QUESTIONNAIRE VERSION: V2
FINAL

DATE: 06 May 2022



WELCOME TEXT:

Thank you for taking part in this survey. Today, we have some questions from Thames Water about priorities for the future and we would like to hear what you think about them.

It should take no more than 10 minutes to complete depending on your answers.

Please click on the NEXT button to get going.

Section SH: Household Customer Screening – only show to household customers

ASK ALL HH CUSTOMERS, OPEN

SH1. Please provide us with your postcode. We use this for the purposes of understanding which part of the Thames Water supply region you live in, and which services you receive from them.

[DESIGN NOTES: TEXT BOX, FORCE POSTCODE FORMAT]

[USE MASTER POSTCODES_SERVICE AND WRZ FILE TO CREATE THE FOLLOWING VARIABLES]

SERVICE TYPE

1. CLEAN & WASTE
2. WASTE ONLY

WRZ

1. GUILDFORD
2. HENLEY
3. KENNET VALLEY
4. LONDON
5. SLOUGH/WYCOMBE/AYLESBURY
6. SWINDON/OXFORD (IF "SWOX")
7. NO WRZ

NON WRZ AREA

1. AFFINITY WATER
2. ANGLIAN WATER
3. BRISTOL WATER
4. CAMBRIDGE WATER
5. ESSEX & SUFFOLK WATER
6. MID KENT WATER
7. SEVERN TRENT WATER
8. SOUTH EAST WATER
9. SOUTHERN WATER
10. SUTTON & EAST SURREY WATER
11. WESSEX WATER
12. WRZ AREA



IF OUTSIDE OF THAMES WATER SUPPLY AREA AND POSTCODE NOT ON LIST **SCREENOUT**

SCREENOUT MESSAGE (INCORRECT AREA):

Unfortunately, as you do not fall within the Thames Water supply area you do not meet the criteria for this research.

ASK ALL HH CUSTOMERS, OPEN

SH2. Please enter your age.

[NUMERIC BOX, MAX 99]

[DESIGN NOTES: CREATE AGE GROUP VARIABLE]

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

ASK ALL HH CUSTOMERS, SINGLE CODE

SH3. Which of the following best describes your employment role?

1. Semi or unqualified / trainee manual worker (e.g. manual workers, all apprentices to be skilled trades, caretaker, park keeper, non-HGV driver, shop assistant)
2. Skilled Qualified / professional manual worker (e.g. skilled bricklayer, carpenter, plumber, painter, bus/ambulance driver, HGV driver, AA patrolman, pub/bar worker etc.)
3. Supervisory or clerical/junior managerial/professional/administrative (e.g. office worker, student doctor, foreman with 25+ employees, salesperson, etc.)
4. Intermediate managerial/professional/administrative (e.g. newly qualified (under 3 years) doctor, solicitor, board director small organisation, middle manager in large organisation, principle officer in civil service/local government)
5. Higher managerial/professional/administrative (e.g. established doctor, solicitor, board director in a large organisation (200+ employees, top level civil servant/public service employee))
6. Student
7. Casual worker – not in permanent employment
8. Homemaker e.g. housewife, househusband etc
9. Retired and living on state pension
10. Retired and living on private pension
11. Unemployed or not working due to long-term sickness
12. Full-time carer of other household member
13. Other

[DESIGN NOTES: CREATE SOCIAL GRADE VARIABLE]

SEG1

1. AB - IF A = CODE 5 SELECTED / B = CODE 4 SELECTED
2. C1 - IF C1 CODE 3, 10 OR 6 SELECTED



3. C2 - IF C2 = CODE 2 SELECTED

4. DE - IF D = CODE 1 SELECTED / E = CODE 7 - 9 OR 11 - 13 SELECTED

SEG2

1. ABC1 (A = CODE 5 SELECTED / B = CODE 4 SELECTED / C1 = CODE 3, 10 OR 6 SELECTED)
2. C2DE (C2 = CODE 2 SELECTED / D = CODE 1 SELECTED / E = CODE 7 - 9 OR 11 - 13 SELECTED)

ASK ALL HH CUSTOMERS, SINGLE CODE

SH4. Which of the following ethnic groups do you consider you belong to?

Asian or Asian British (TITLE ONLY)

1. Indian
2. Pakistani
3. Bangladeshi
4. Any other Asian background (please specify) [OPEN]

Black (TITLE ONLY)

5. Black British
6. Black Caribbean
7. Black African
8. Any other black background (please specify) [OPEN]

Chinese (TITLE ONLY)

9. Chinese
10. Any other Chinese background (please specify) [OPEN]

Mixed Race (TITLE ONLY)

11. White and Black Caribbean
12. White and Black African
13. White and Asian
14. Any other mixed background (please specify) [OPEN]

White (TITLE ONLY)

15. White British
16. White Irish
17. Any other white background (please specify) [OPEN]

18. Other (please specify) [OPEN]

19. Prefer not to say

[DESIGN NOTES: CREATE ETHNICITY VARIABLE]

1. WHITE - IF S4 = 15-17
2. BME - IF S4 = 1-14 OR 18 OR 19

ASK ALL HH CUSTOMERS, MULTI CODE



SH5. Do you consider yourself to be officially disabled defined by the Equality Act 2010 as 'A physical or mental impairment which has a substantial and long-term adverse effect on a person's ability to carry out day-to-day activities'? If yes, which of the following disabilities do you consider yourself to have? Please select all that apply:

1. Visual disability
2. Hearing disability
3. Mobility disability
4. Learning disability
5. Mental health condition
6. Chronic illness
7. Disability requiring the use of at-home medical equipment (e.g. dialysis machines)
8. Other, please specify
9. I do not have any of these conditions or disabilities

[DESIGN NOTES: CREATE DISABILITY VARIABLE]

1. DISABILITY: SH5 = 1-8
2. NO DISABILITY SH5 = 9

ASK ALL HH CUSTOMERS, SINGLE CODE

SH6. Are you...?

1. Male
2. Female
3. Other gender category
4. Prefer not to say

ASK ALL HH CUSTOMERS, SINGLE CODE

SH7. To the best of your knowledge, do you have a water meter installed at your home/property?

1. Yes. I have a water meter installed at my home/property i.e. I pay for what we use
2. No, I do not have a water meter installed at my home/property i.e. I pay a fixed amount each month
3. Don't know



Section SB: Business Customer Screening – only show to business customers

ASK ALL BUSINESS CUSTOMERS, SINGLE CODE

SB0. Which of the following best describes your level of responsibility for managing the supply of water and wastewater services at your organisation's property?

1. Solely responsible / the main person responsible
2. Partially responsible / one of several people responsible
3. Bill payer / administrator of the account
4. I am not responsible at all SCREENOUT

ASK ALL BUSINESS CUSTOMERS, OPEN

SB1. Please provide us with the postcode for your business. We use this for the purposes of understanding which part of the Thames Water supply region it is based in, and which services you receive from them.

[DESIGN NOTES: TEXT BOX, FORCE POSTCODE FORMAT]

[USE MASTER POSTCODES_SERVICE AND WRZ FILE TO CREATE THE FOLLOWING VARIABLES]

SERVICE TYPE

1. CLEAN & WASTE
2. WASTE ONLY

WRZ

1. GUILDFORD
2. HENLEY
3. KENNET VALLEY
4. LONDON
5. SLOUGH/WYCOMBE/AYLESBURY
6. SWINDON/OXFORD (IF "SWOX")
7. NO WRZ

NON WRZ AREA

1. AFFINITY WATER
2. ANGLIAN WATER
3. BRISTOL WATER
4. CAMBRIDGE WATER
5. ESSEX & SUFFOLK WATER
6. MID KENT WATER
7. SEVERN TRENT WATER
8. SOUTH EAST WATER
9. SOUTHERN WATER
10. SUTTON & EAST SURREY WATER
11. WESSEX WATER
12. WRZ AREA



IF OUTSIDE OF THAMES WATER SUPPLY AREA AND POSTCODE NOT ON LIST [SCREENOUT](#)

SCREENOUT MESSAGE (INCORRECT AREA):

Unfortunately, as you do not fall within the Thames Water supply area you do not meet the criteria for this research.

ASK ALL BUSINESS CUSTOMERS, SINGLE CODE, RANDOMISE 1-5

SB2. What industry does your business operate in?

1. Construction, mining, manufacturing, agriculture
2. Wholesale, retail, repair motor vehicles, transportation
3. Accommodation and food service activities
4. Services – information, financial, real estate, professional, scientific, technical activities, admin and support
5. Public organisations, education, health and social work
6. Other services

ASK ALL BUSINESS CUSTOMERS, SINGLE CODE, DO NOT RANDOMISE

SB3. Including yourself, how many employees work within your business?

1. 0-9 employees
2. 10-249 employees
3. 250+ employees

ASK ALL BUSINESS CUSTOMERS, SINGLE CODE

SB4. How many sites does your business operate from?

1. One
2. Two
3. Three
4. Four
5. Five
6. More than five



ASK ALL BUSINESS CUSTOMERS, MULTICODE. RANDOMISE 1-4.

SB5. Which of the following options apply to you, in relation to the supply of water to your business?

Water is vital for...

1. ...the manufacturing process which is essential to the running of your organization (e.g. to power machinery, agricultural production etc.)
2. ...the supply of services your organisation provides (e.g. cleaning services etc.)
3. ...an ingredient or part of the product or service your organisation provides (e.g. food or drink, chemical, cosmetics manufacturer etc.)
4. ...normal domestic use for your organisation's customers and employees (e.g. customer toilets, supply of drinking water)
5. None of the above **HOLD. EXCLUSIVE**

Section A: Introductions – show to all

Intro and background – SHOW ON SCREEN ON ITS OWN

Before the survey fully begins, here are some more details on why Thames Water are carrying out this research.

Thames Water are committed to meeting the needs of its customers now and in the future. First of all, we will be discussing Thames Water's vision for 2050.

Thames Water are planning to make significant changes and improvements to the service they provide over the coming decades, while tackling challenges that the future may bring, such as a changing climate and growing population.

You will be asked to review and rank various initiatives that could be part of Thames Water's vision for 2050. All of your feedback will be taken account of and will help to support decisions about what course of action Thames Water may take.

Please click **NEXT** to continue.

ASK ALL, GRID, SINGLE CODE PER ROW

A1. Please read the following, which are the overall aims for Thames Water's 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
- **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 are 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

How **important** are each of these areas of Thames Water's service to you, on a scale of 0 to 10, where 0 is 'not at all important' and 10 is 'very important'?

	0 – not at all important	1	2	3	4	5	6	7	8	9	10 – very important
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 are 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											

ASK ALL. OPEN TEXT WITH 'NOTHING MISSING' TICK BOX

A2. Is there anything missing from the list that you think Thames Water should aim to do for the future?



Intro to Vision 2050 goals – SHOW ON SCREEN ON ITS OWN

Now please read more details of the individual goals that will help Thames Water achieve their vision for 2050, across the five areas we just discussed (water, waste and rivers, customer, energy and communities).

Each of the descriptions will give you a summary of the issue - how Thames Water are currently performing and where they want to be by 2050.

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.

INSERT 'VISION 2050 GOALS' STIMULUS

Please click NEXT to continue. HIDE THE NEXT BUTTON FOR 30 SECONDS.

ASK ALL. GRID. RANDOMISE ROWS. SINGLE CODE PER ROW

A3. Now that you have reviewed all of the goals, we want to understand how **important** each one is to you, **in relation to each other**. 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'.

INSERT 'VISION 2050 GOALS' STIMULUS

	0 – not at all important	1	2	3	4	5	6	7	8	9	10 – very important
Guarantee high quality drinking water											
Replace all lead pipes											
Provide a more reliable supply of water											
Reduce leakage to below 10% (the proportion of water that leaks out of pipes on its way to customers)											
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											



Provide a more reliable supply of water																				
Reduce leakage to below 10% (the proportion of water that leaks out of pipes on its way to customers)																				
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																				
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 our region so they become among the healthiest in the UK																				
Help reduce disruptive rainwater flooding																				
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																				
Help tackle climate change by becoming 'net negative' (when we take more carbon out of the atmosphere than we put in)																				
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 benefit wildlife and create natural spaces for people to visit																				
Use the land Thames Water owns to create jobs and housing																				

Please review the score you have given each goal in relation to the other goals and that this feels right to you before you move on.

ASK ALL OPEN TEXT WITH 'NOTHING MISSING' TICK BOX

A5. Was there anything missing from the list of goals that you think Thames Water should aim to do for the future?

Intro to Public Value measures – SHOW ON SCREEN ON ITS OWN

We would now like to show you some activities that Thames Water could do to give wider benefits for customers, communities and the environment. Some of these wider benefits could come from how Thames Water deliver the existing water and sewage services, for example using natural solutions for sewage treatment which benefits wildlife. Other benefits could come from additional activities such as developing renewable energy at sewage treatment works.

It's important that you remember that Thames Water fund their activities using money from customers' bills.

Please read through all of the following information.

INSERT 'PUBLIC VALUE ACTIVITIES' STIMULUS

Please click NEXT to continue. HIDE THE NEXT BUTTON FOR 30 SECONDS.



ASK ALL. GRID. RANDOMISE ROWS. SINGLE CODE PER ROW

A6. Thinking about all the activities that you've just reviewed, we'd like you to rate all of them in terms of how much priority you want Thames Water to allocate to each in the coming years, on a scale of 0-10, where 0 is 'no priority at all' and 10 is 'very high priority'?

INSERT 'PUBLIC VALUE ACTIVITIES' STIMULUS

	0 – no priority at all	1	2	3	4	5	6	7	8	9	10 – very high priority
Getting more energy from renewable sources											
Looking after every drop of water											
Protecting services against climate change											
Looking after biodiversity											
Keeping rivers clean											
Keeping noise to a minimum											
Connecting you with your surroundings											
Bringing communities together											
Helping those who need it most											
Building trust											
Supporting your health and wellbeing											
Helping local economies thrive											
Minimising transport disruption											
Building skills and knowledge											
Keeping Thames Water secure											
Keeping our people safe and well											
Delivering our essential services											



ASK ALL. OPEN TEXT WITH 'NOTHING MISSING' TICK BOX

A7. Was there anything missing from the list of activities that you think Thames Water should aim to do to give wider benefits to customers, communities and the environment?

NHH CUSTOMERS GO TO END TEXT AFTER A6

Section B: Further profiling

SHOW TO HH CUSTOMERS ON SCREEN ON ITS OWN

Finally, just a few more questions about you to help us put your answers into context.

Please click NEXT to continue.

ASK ALL HH CUSTOMERS, SINGLE CODE

B1. Please could you confirm which household situation best applies to you?

1. Living on my own (children have left home)
2. Living on my own (no children)
3. Living on my own with children under 18
4. Living with partner/spouse (children have left home)
5. Living with partner/spouse (no children)
6. Living with partner/spouse with children under 18
7. Living with other adult family members that are aged 18 or older (e.g. adult children, parents and/or elderly relatives)
8. Living with other adults that are non-family members e.g. friends/flatmates

ASK ALL HH CUSTOMERS, SINGLE CODE

B2. What is the combined net income (take home pay) of your household? By this we mean how much money does your household receive after deductions.

We would like you to include any benefits received or benefits paid directly to your landlord as part of your rent (e.g. Housing benefit), however you don't need to include any disability related payments as income.

1. Up to £10,000 a year / up to £667 a month
2. £10,001 – £12,000 a year / £834 - £1,000 a month
3. £12,001 - £14,000 a year / £1,001 - £1,166 a month
4. £14,001 - £16,385 a year / £1,167 - £1,365 a month
5. £16,386 - £19,747 a year / £1,366 - £1,646 a month
6. £19,748 - £30,000 a year / £1,647 - £2,500 a month
7. £30,001 - £40,000 a year / £2,501 - £3,300 a month
8. £40,001 - £50,000 a year / £3,301 - £4,100 a month
9. £50,001 - £70,000 a year / £4,101 - £5,800 a month
10. £70,001 - £100,000 a year / £5,801 - £8,300 a month
11. More than £100,000 a year / more than £8,300 a month
12. Prefer not to say

CLOSING TEXT

That's all for today! Thank you so much for taking the time to complete this survey, we appreciate your feedback.

Public value stimulus shown at question A4

The environment

Activity	More about this
Getting more energy from renewable sources	Getting more of our energy from renewable sources (such as the sewage treatment process and solar panels and wind turbines on sites)
Looking after every drop of water	Limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains, and making sure water is used efficiently by all customers
Protecting services against climate change	Reducing the risks from extreme weather (such as flooding, cold snaps or heatwaves) which could impact water and sewage services
Looking after biodiversity	Improving the variety of wildlife and plants in and around Thames Water sites
Keeping rivers clean	Making sure that sewage doesn't harm the quality of water in the environment
Keeping noise to a minimum	Protecting customers from noisy Thames Water activities such as roadworks or water and sewage treatment processes

Customers and communities

Connecting you with your surroundings	Providing areas and facilities to spend time outdoors, such as reservoirs and wetlands
Bringing communities together	Providing opportunities to communicate, meet and learn within our communities, such as community training, education and volunteering
Helping those who need it most	Supporting priority and vulnerable customers with extra help when they need it
Building trust	Earning customer confidence in Thames Water as a company
Supporting your health and wellbeing	Providing activities that help our communities stay active and well, such as outdoor exercise at our sites
Helping local economies thrive	Contributing to local economies, for example, by providing jobs
Minimising transport disruption	Protecting customers from road or railway disruption that Thames Water activities may cause

Capability, employees and essential services

Building skills and knowledge	Providing accessible and high-quality training, developing skills and knowledge for our workforce
Keeping Thames Water secure	Protecting our sites, services and data from potential security threats
Keeping our people safe and well	Supporting employee wellbeing and protecting them from harm
Delivering our essential services	Providing drinking water to customers and taking away and treating wastewater, returning it safely to the environment