TMS03
Customer Engagement

Customer Engagement and Challenge
Workstream

Contents

1. Introduction

1.1. Document purpose

The purpose of this document is to explain and justify our approach to engaging with customers, communities, and stakeholders, and to explain how our engagement has been used to inform our business plan and long-term delivery strategy. It demonstrates that our approach and activities meet Ofwat's standards for research, challenge and assurance.

We also provide evidence that we have followed Ofwat's guidance for testing customers' views of the acceptability and affordability of our proposals, and how we have adhered to Ofwat's guidance for Your Water, Your Say open challenge sessions.

This document complements TMS04 What Customers, Communities and Stakeholders Want, where we have consolidated our understanding of customers' needs and expectations, and TMS05 CCG Report, which is the report from our Customer Challenge Group. We demonstrate we have taken account of our customer engagement across our PR24 documents, principally in TMS06 Our Long Term Delivery Strategy, TMS07 Bill Impact, Affordability and Vulnerability, TMS08 Our AMP8 Water Outcomes Delivery Strategy, TMS09 Our AMP8 Wastewater Outcomes Delivery Strategy, TMS11 Our Customer Strategy and TMS12 Developer Services, as well as our Enhancement Cases (TMS21-29) and TMS34 Bespoke PC: Collaboration in London.

1.2. Executive summary

We believe it is vital our ongoing performance, business plans, Vision 2050 and long-term strategy are shaped by our customers and communities and delivered in partnership with them.

Through our engagement programme we have developed a comprehensive understanding of the diversity of customers' and communities' needs, priorities and concerns, including those of current and future customers, residential customers and businesses, customers in vulnerable circumstances, developers and retailers. We have drawn on 320 insight sources, which we have consolidated in our What Customers, Communities and Stakeholders Want document, using a best practice 'insight triangulation' approach.

Our engagement to support the development of our PR24 Plan has been targeted at aspects of our plans where customers' views can have a meaningful influence. Our focus has been on quality over quantity, with 18,709 customers[1] engaged in deep dive research on our plans. The PR24 engagement complements our more extensive ongoing engagement, which includes over 200,000 customers each year and seeks to ensure day-to-day decision making and delivery is constantly improving.

Our engagement has complemented the Ofwat/CCW-led collaborative customer research, and has examined locally important priorities, our 2050 Vision and the phasing of delivery of

[1] Our data tables SUP14.1 and SUP14.2 (number of household and non-household customers engaged with during development of our plan) show a much higher number (a total of 804,964) due to the inclusion of customers who contributed feedback as part of our ongoing service delivery engagement from April 2020 to August 2023. While not PR24-specific, these ongoing insights have informed our plan.

outcomes. In building our PR24 proposals we have taken account of the results of the research on common areas of company business plans and on Performance Commitments and ODI rates.

To ensure we reflect what customers want, we have developed and implemented a ‘Line of Sight’ process through which we consider customers’ views in our decision making for our PR24 business plans and long-term delivery strategy.

Our customer insights and PR24 planning teams have collaborated to understand where customer views can have a meaningful impact on our decisions and to document these at different levels across our PR24 submission. This has involved several iterations of insights triangulation and decision making to ensure our plan responds appropriately to what customers, communities and stakeholder expect from us.

In our Line of Sight documentation for our PR24 plan, we aim to clearly show how we have used customer, community and stakeholder views when developing our PR24 plan. This has included framing our entire plan around the 10 key Wants that customers prioritise, using insights to inform the development of our AMP8 and long-term delivery strategies, and refining our final proposals based on customer views of what is affordable and acceptable.

Having spent 2022 building plan proposals in response to customers’ views, in the first half of 2023 we invited challenge from our customers and their representatives on how well our draft PR24 plan reflected their preferences. In line with Ofwat’s guidance we conducted acceptability and affordability testing customer research and a ‘Your Water, Your Say’ open challenge session. We used the feedback, alongside additional customer research and ongoing challenge from our Customer Challenge Group (CCG), to further improve our AMP8 and long-term plans. We re-tested our revised plan in August 2023 before submitting it to Ofwat.

Our independent CCG, formed in January 2022, has provided challenge on the quality of our customer engagement, the extent to which customer priorities are reflected in what we do, and our delivery against those priorities. Its challenges have, for example, helped make our research more inclusive, our PR24 decision making clearer, the evidence for our affordability approach more robust, and our social media communications more targeted.

Our Board has overseen our customer engagement and provided assurance on its quality and use. The Board Customer Service Committee has taken a lead in overseeing the quality of our engagement and the Regulatory Strategy Committee has overseen the extent to which it has been used to inform our PR24 plan (i.e. ‘Line of Sight’). Both committees have been shown and reviewed customer engagement evidence and the full Thames Water Board has provided a statement that our customer engagement and its application meets the required standards and relevant best practice. To support the Board in providing the assurance statement, we commissioned independent expert assurance by Savanta of our customer research, the triangulation of research findings and other data, how we have considered customers’ views in our decision making and of our customer challenge arrangements.

To demonstrate transparency and foster the sharing of best practice, we have shared our customer research findings in full with others in the industry and made them accessible to customers and the wider public on our website. A summary of key challenges and company responses grouped around the CCG's five priority themes, as well as other outputs and documents related to the operation of the CCG, have also been published on our website.

In delivering our programme of engagement we have been mindful of Ofwat's minimum standards and other best practice. In this document we demonstrate how we have met the standards for high-quality research, customer challenge and assurance of customer engagement.

1.3. Document structure

Chapter	Content	Other relevant appendices, evidence and supporting documents
1. Introduction	• Document purpose • Executive summary • Document structure	
2. How we engage customers	• Lessons from PR19 • Why we engage • Who our customers are • Insights to shape our ongoing delivery, business plan and long-term delivery strategy • PR24 research	• Customer research and sampling approach, September 2023 (included in Section 8) • Research reports on Thames Water website (link here – please see Table 2.3 in Section 2.9 for individual report links) and in Thames Water Insight Hub (available on request)
3. Line of sight from what customers want to our PR24 plan	• Approach to insights triangulation • What customers want and relative priorities • How insights have informed our plan • Dealing with tensions and making trade-offs	• TMS04 What Customers, Communities and Stakeholders Want v18.3, September 2023 • Water, Wastewater and Customer Service Engagement Summaries, September 2023 (included in Section 8) • Line of Sight sections in other appendices (see Table 3.3 in Section 3.9) • PR24 triangulation and line of sight methodology, August 2023 (included in Section 8)
4. Testing our plan with customers and inviting challenge	• Acceptability and affordability testing • Your Water, Your Say	• Acceptability and Affordability Testing qualitative report, May 2023 (on Thames Water website: link here) and quantitative report, September 2023 (on Thames Water website: link here) • Thames Water Your Water Your Say report, May 2023 (on Thames Water website: link here), and Thames Water Your Water Your Say approach, August 2023 (on Thames Water website: link here)
5. Customer challenge	• Our mechanisms for customer challenge, including the CCG	• TMS05 CCG Report, including challenge log • CCG section of Thames Water website (link here)
6. Board assurance	• Board oversight • Independent expert assurance	• TMS50 Customer Engagement Assurance Phase D, Savanta, September 2023
7. Minimum standards	• Ofwat's principles and minimum standards	
8. Supporting documents	• Customer research and sampling approach, September 2023 • PR24 triangulation and line of sight methodology, August 2023 • Engagement Summaries, September 2023	

2. How we engage customers

2.1. We have learned from our experiences at PR19

Our experiences at PR19 pointed to the need for a different approach to customer engagement at PR24. While we believe Ofwat regarded our research as high quality, our biggest shortcoming at PR19 was that we did not adequately demonstrate how we had responded to customers' views.

In its PR19 IAP in January 2019, in which we were graded C for our engagement, we noted that Ofwat stated: 'Thames Water gives evidence of a high-quality approach to engaging with customers. However, there is insufficient evidence that the company reflected customers' views in its proposals for Performance Commitments or related ODIs.'

Learning from PR19 and emerging best practice guidance and expectations from CCW and Ofwat, we concluded that:

- Our plans still needed to start with customers. We needed to respond to customers' expectations and demonstrate a clear line of sight from their views to our plans.
- Our customer research needed to be made more targeted and efficient but remain high quality. We needed to decide what customer inputs we required (and when) to build a customer-centric plan, understand which would be addressed by national research and commission our own complementary high-quality research.
- Customer research for our long-term planning was only part of the customer engagement story. We needed to continue to demonstrate ongoing customer, community and stakeholder engagement, and collaborate with others to solve issues.
- Our engagement and its use needed to have strong internal governance and board ownership, underpinned by independent assurance and external challenge to ensure we genuinely understood and responded to customers.

We believe the approach and activities described and evidenced in this document address these points.

- Line of Sight, which is about demonstrating how we have considered and acted on customers' views, has been the central guiding principle of our customer engagement. In Section 3 we provide an overview of our Line of Sight framework, the key customer insights gathered and how they have informed our decisions. The seriousness of our intent is underlined by our two-year collaboration with Sia Partners, experts in designing and implementing engagement and triangulation approaches for regulated utility companies and authors of CCW's report on triangulation best practice, who we appointed as advisors in August 2021. We made Line of Sight the responsibility of all the teams preparing our PR24 submission. We include reference in Section 3 to the other documents across our plan with Line of Sight sections where we demonstrate the use of customer evidence when making decisions and how our plan responds to customer feedback.
- Line of Sight also meant only doing research when the findings would be used in our decision making and our customers' views could influence our plan. Early in our PR24 programme of work we identified where insights were needed to inform our decisions (see Figure 2.2 Our framework for PR24 customer engagement in Section 2). We then identified where these insights would be provided by existing ongoing sources or the

Ofwat & CCW-led collaborative research. In undertaking targeted customer research to inform our PR24 planning, and in line with Ofwat's guidance, we have strictly avoided any research that duplicates the central research on common Performance Commitments and ODI rates or the standardised research on the acceptability and affordability of business plans. We have not, for example, conducted our own Willingness to Pay research and we instead rely on the ODI rates from Ofwat. In Section 2 we set out how our focus has been on locally important priorities, enhancement schemes and bespoke Performance Commitments, as well as our long-term delivery strategy, including our Vision 2050 and the phasing of delivery of outcomes.

- We feel strongly that customer engagement is a continuous activity and not one we do solely to meet the requirements of the periodic price review process. We have continued our extensive ongoing programme of customer engagement, including to help improve our service, communications and support for customers in vulnerable circumstances, which we describe in Section 2.
- Customer engagement has been one of the principal workstreams from the inception of our PR24 programme, with strong cross-programme collaboration and governance to ensure we conduct the right customer research and act on it. In Section 5 we demonstrate how our CCG has challenged our customer research and line of sight and in Section 6 how our Board has overseen and assured our end-to-end customer engagement.

2.2. We engage to help deliver better outcomes for customers, communities and the environment

We engage with our customers, communities and stakeholders to understand their preferences and priorities on the issues that matter to them, whether service, price or wider community and environmental impacts and benefits. Customers' needs and expectations are central to our decision making and their feedback informs our ongoing delivery and long-term planning.

We recognise that engagement is also about customer and community participation in delivering better outcomes, through education and behaviour change, co-creation and collaboration.

2.3. We understand the full diversity of our customer base

Our customer engagement includes the end-users of our water and wastewater services - current and future customers, household and non-household, dual water & wastewater and wastewater-only, representing different demographics and firmographics. We take particular care to include customers in vulnerable circumstances, for example, those who are disabled or chronically sick, the elderly and those on low incomes or struggling to pay bills. We also engage with other kinds of customers, including business retailers, developers and new appointees. Further details can be found in our Customer Research and Sampling Approach[2] and the 'Our Customers' section of our What Customers Communities and Stakeholders Want document[3]. We summarise our key customer segments in Table 2.1.

Our engagement also encompasses community and stakeholder groups representing the concerns of customers, such as groups with shared interests, those living near our works,

[2] Customer research and sampling approach 2023, Thames Water, September 2023 (see Section 8)
[3] TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023

elected representatives, advocacy organisations, charities and NGOs. Further details can be found in our Customer Research and Sampling Approach[2]. We summarise our key community and stakeholder segments in Table 2.2.

Table 2.1: Customer segments

Household	Non-household	Developer
Those who use or pay for our services	Businesses and other organisations – who use our service and fund it indirectly	People and organisations connecting properties to our networks
Geographies and demographics	Different locations and firmographics	Homeowners extending their properties
Services used: water and wastewater or wastewater-only[4]	Different usage and dependencies on water: from large industrial users to those just using water for domestic purposes	Large developers who wish to connect to our clean water and wastewater networks
Billing and account relationships: tariff, metered or unmeasured, online account management	Retailers: 17 organisations who are licensed to handle retail issues and billing for non-household customers in our area	Self-lay providers who can partner with us to provide customers with the building work required to connect to our networks
Customers in vulnerable circumstances, who would benefit from our reduced tariffs (on a low income, struggling or at risk of struggling to pay the bill) or our Priority Services Register (with health conditions or other situational factors)	Landlords and Local Authorities/Housing Associations who may handle billing for household customers	New Appointments & Variations (NAVs) – organisations providing water, wastewater and billing services to customers in defined locations within our area
Future customers: children and young adults not paying bills yet		
Under-represented customers: who may not be included in research using traditional sampling methodologies		
Commuters, domestic and international visitors		

[4] Water-only customers make up less than 1% of household customers so are not typically included in research samples. They are though in scope for some survey research, such as our ongoing Service Survey.

Table 2.2: Community and stakeholder segments

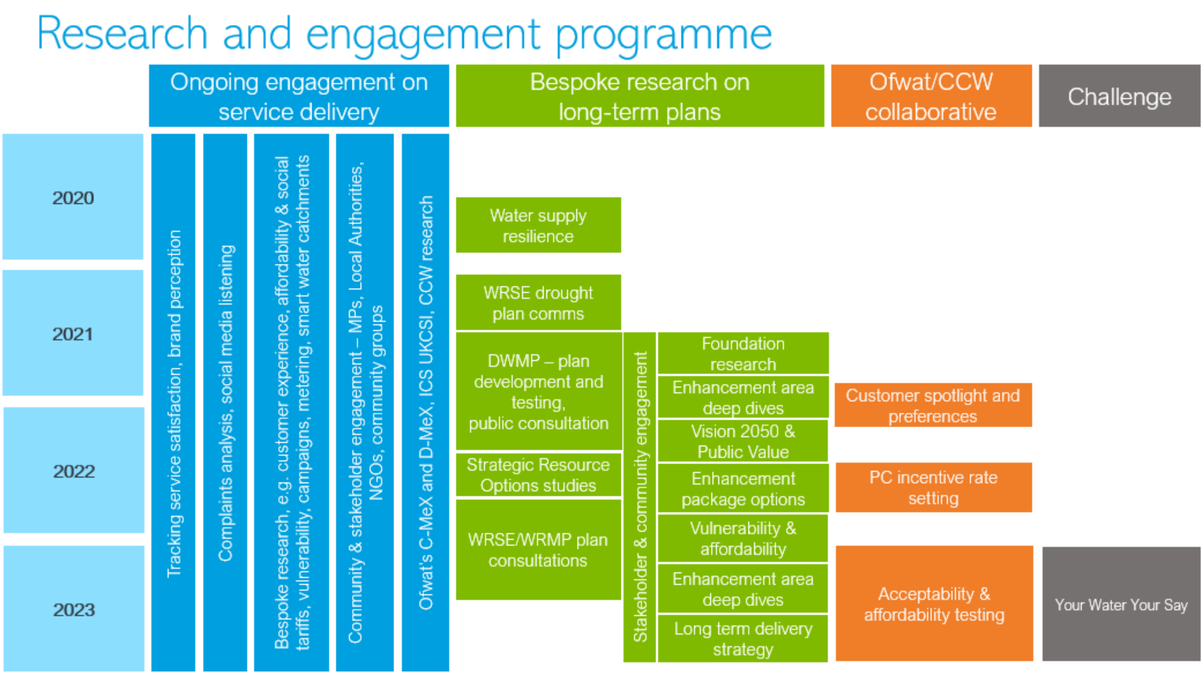
Communities	Stakeholders
Communities of customers in local and regional areas	Organisations who represent the interests of household and non-household customers, e.g. Citizens Advice, Age Concern, Chambers of Commerce, National Farmers Union
Groups of customers with shared interests, e.g. religious groups, anglers, students, young people	Elected representatives, e.g. councillors, MPs and London Assembly members
Smarter Water Catchment areas and other water catchment areas	Local authorities, regional and national government officials
Those living near sewage or water treatment works, roadworks, construction sites	Charities and NGOs, e.g. local or regionally focussed environment groups
Those impacted by one-off or ongoing incidents (e.g. sewage/river floods, polluted rivers, water outages, bursts, low pressure)	Our supply chain, e.g. construction and insurance sectors

2.4. We gather insights to improve our ongoing delivery and shape our business plan and long-term delivery strategy

Understanding what customers, communities and their representatives want and acting on their feedback is the primary focus of our customer engagement.

In Figure 2.1 we set out the activities that make up our ongoing and PR24-focused customer research and engagement programme as we develop our business plan submission. We explain each of the components and how they adhere to minimum standards and best practice in the following sections of this document.

Figure 2.1: Customer research and engagement programme



Source: Thames Water, Customer Research & Insight and Stakeholder Relationship teams

2.5. Ongoing engagement helps us improve service delivery and communications

We have an ongoing research and engagement programme, which is targeted at areas that customers, communities and stakeholders care about and where their views can have a genuine impact on our decision making.

Service delivery teams across Thames Water use ongoing insights from a variety of sources to improve delivery for customers and improve relationships with communities and stakeholders. These include our Thames Water Customer Voices[5] insight community, service satisfaction and brand perception trackers, complaints analysis, social media listening and stakeholder reputation tracker as well as insights from expert organisations like CCW and the Institute of Customer Service. Customer insights are shared across the business in a monthly Heartbeat of Insight[6] and stored in our Insight Hub[7].

Insights also come from bespoke customer research into specific topics that will aid our decision making about areas of importance to customers. It is essential that we deliver an inclusive service so in early 2023 we conducted research with customers who are most vulnerable to harm, from a range of communities and backgrounds with health, situational or financial vulnerabilities, focusing on groups that were under-represented in previous research, such as specific minority ethnic communities and non-English speakers. This research helped inform ongoing delivery for this segment as well as influencing our PR24 vulnerability strategy[8].

Another example of bespoke customer research to aid our decision making is around our social tariff. In 2022 we conducted research with household customers, including digitally excluded customers and those who would quality for the social tariff. This research tested the extension of the cross-subsidy of our current social tariff by a further £10 per bill payer per year, which would allow more customers who qualify for the social tariff to have their bills discounted. This research helped inform changes to our current cross-subsidy[9]. In 2023 we conducted further research with metered household customers, including digitally excluded customers and those who would quality for the social tariff, to test a new (Rising Block) tariff based on water consumption, whereby the highest users would be charged more per unit of water and their higher bills would be used to help the increased number of customers we forecast will qualify for the social tariff up to 2030. This research supported the development of our PR24 Affordability and Vulnerability strategy[10].

Teams from across Thames Water build and maintain relationships with our diverse communities and their representatives. Engagement is tailored to focus on the issues that matter to stakeholders. Our local engagement teams understand and respond to views on the operation of water and wastewater networks, and our capital delivery teams explain and seek

[5] Thames Water Customer Voices is our online research community of over 1,000 household customers. It enables an ongoing conversation with a representative group of customers
[6] The Heartbeat of Insight is a monthly bulletin sent to senior leaders and managers across Thames Water. It highlights key information on customer experience design and performance
[7] The Insight Hub allows teams from across Thames Water to benefit from the latest customer experience and strategic planning insights
[8] Vulnerability deep dive, Community Research, March 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/vulnerability-march-2023.pdf
[9] Social tariff extension, Verve, September 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/social-tariff-september-2022.pdf
[10] Rising block tariff, Verve, September 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/rising-block-tariff-september-2023.pdf

feedback on projects to improve our services. For example, during a lengthy repair following a collapsed sewer in a residential road in Wokingham in 2022, customer drop-in sessions, letters, posters, door-to-door visits and a 24/7 crew were used to engage with impacted customers, and as a result of their feedback the timings and placement of the works and the communications themselves were improved. Another example is in the area served by the Mogden Sewage Treatment Works in South West London where we have trialled a new approach to engaging customers and stakeholders across this wastewater catchment, allowing us to become closer to those local communities. We have engaged with them through the local authority about behaviour that causes sewer blockages, we have held community engagement events such as tours of the treatment works and we have updated customers on issues we experience throughout the catchment so they can help us to look after local rivers. So far this approach has resulted in a reduction in blockages in the area and local residents groups say their engagement with us is more informative and more successful than before.

Through our Smarter Water Catchments initiative, we work with communities and stakeholders to improve water quality, enhance biodiversity and improve flood management. To better serve customers in vulnerable situations we work with a group of around 30 stakeholders from advisory, statutory, government and third sector organisations.

2.6. Our business plans and long-term strategy are informed by customers' views

Our research and engagement programme observes Ofwat's standards for high quality research[11] and it also considers guidance from CCW regarding best practice for engaging with customers.[12 13] We keep up to date on research and engagement best practice, both within and outside our industry, through our relationships with counterparts in other water companies, expert advocacy organisations, our research agencies and via membership of research bodies such as the Market Research Society (MRS), the world's leading research association, and the Association of Users of Research Agencies (AURA), the UK body for client-side research professionals.

To supplement our ongoing engagement, and in line with CCW's framework for the type and volume of research carried out across a typical five-year period, we have commissioned targeted research to inform our business plans and long-term delivery strategy. Our PR24-specific research is focussed on areas where customers can have a meaningful influence on our submission: our long-term delivery strategy, including our 2050 Vision, our AMP8 strategies and Performance Commitment levels, our choices around potential enhancement spend and its phasing, and the acceptability and affordability of our overall business plan, including for those who struggle, or at risk of struggling, to pay their bills. Our key projects are summarised in Table 2.3. The full reports for each of these projects contains a declaration on how Ofwat's standards for high quality research have been met. A summary of how we met these standards at an engagement programme level is also shown in Table 7.2 'How we have met Ofwat's minimum standards for high quality research'.

We have also organised specific stakeholder engagement sessions to understand their objectives and expectations of us over the short, medium and longer term. Looking for areas where we are aligned with our stakeholders or have shared goals is particularly helpful when thinking about potential partnership and collaborative opportunities at PR24. Stakeholder

[11] PR24 and beyond: Customer engagement policy – a positioning paper, Ofwat, February 2022
[12] Engaging water customers for better consumer and business outcomes, CCW/Blue Marble, May 2020
[13] Framework for water company research, CCW, November 2020

engagement on our 2050 Vision was incorporated into initial conversations around the proposed balance of priorities in our emerging PR24 Plan. We spoke with several stakeholders, from the GLA, local government, through to our insurance providers and capital delivery partners[14] [15]. Stakeholders were further engaged on our future plans and investments through our annual stakeholder reputation survey[16], our WRMP and DWMP consultations [17] [18] and through ongoing conversations with elected representatives in our coverage area[19].

We also periodically compile and share our What Customers, Communities and Stakeholders Want (WCCSW) document with colleagues across the business, which helps inform business planning and long-term delivery strategy, as well as ongoing delivery. See Section 3.5 for further information.

2.7. We share our research findings and approaches and learn from others

To foster best practice sharing of research approaches and to increase the value of customer evidence we set up a SharePoint site in partnership with the other water companies in the South East of England and gave access to the wider water sector[20]. We also created a page on our website to share our research more widely with customers and the public.[21]

We took the opportunity to benchmark, learn and adopt best practice methods from other companies. For example, Southern Water used a case study approach to highlight the needs and experiences of vulnerable customers and under-researched communities; a powerful story telling approach that we adopted for our own vulnerability deep dive research. Before conducting research to understand the priorities of future customers we reviewed Wessex Water's Young People's Panel and also how a charity had set up Youth Juries, before devising our own survey methodology for this segment. In consultation with engagement leads from other water companies, we explored different ways to make our Your Water Your Say open challenge sessions as inclusive and effective as practically possible. We also collaborated with Affinity Water to test the acceptability and affordability of our respective draft business plans, ensuring customer-centric and high quality research for our shared customers, and we shared approaches, knowledge and experiences with other South East England water companies as we progressed through each stage of the acceptability and affordability research.

We compared others' research findings with our own to develop our understanding of customer views, preferences and experiences. We participated in regular calls with the other South East England water companies – around once a month – and longer meetings in October 2022 and September 2023 where we shared our understanding of customers' priorities from different projects and insights triangulation. This helped us understand where and why there was consistency or differences across the region. We have also used Ofwat and CCW's customer research in our triangulated insights. Please see Section 3 for our approach to insights triangulation and its outputs.

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[14] Local Government, Insurance Providers, Community & Capital Delivery Engagement, May-June 2022
[15] PR24 Early engagement with the GLA (water and waste), Thames Water, March 2022
[16] Stakeholder Reputation Survey, Yonder, March 2022 and March 2023
[17] WRMP Consultation 2023 https://dn9cxogfaqr3n.cloudfront.net/revised-draft/statement+of+response+on+draft+wrmp24/dWRMP24+Statement+of+Response.pdf
[18] DWMP Consultation 2023 https://www.thameswater.co.uk/media-library/home/about-us/regulation/drainage-and-wastewater/non-technical-summary.pdf
[19] Elected representatives issues tracker to Q1 2023
[20] Customer Research Sharing Hub, SharePoint for South East England water companies
[21] Our customer research - www.thameswater.co.uk/about-us/performance/our-customer-research - public area of Thames Water website

2.8. We work with customers and communities to co-deliver better outcomes

Thames Water collaborates with our customers and communities to address challenges such as driving down water demand (via our water efficiency activities), reducing sewer blockages (via our Bin It Don't Block It campaigns and other interventions) and improving our river catchments (via our Smarter Water Catchment programme). Specific examples include:

- We have conducted Smarter Home Visits with households identified via smart meter data to have high water usage, giving them water saving advice that has enabled us to maximise water demand reductions[22]
- We have written to customers who live within 30 meters of a fat/grease sewer blockage to explain and educate about the situation and ask if they want to order a free fat trap to help prevent further blockages[23]
- In our Smarter Water Catchment programme we have worked with communities near the Rivers Chess, Crane and Evenlode to expand our Citizen Science river monitoring in order to measure the effectiveness of river health initiatives delivered in these areas[24].
- We have taken feedback from customers and conducted usability testing with users to improve various online customer journeys, such as reporting a leak, reporting a sewer blockage, moving home arrangements and setting up payment plans. This co-design has, for example, led to an 150% increase in blockages being reported online and satisfaction levels for this journey doubling[25]
- We have plans to work together with customers to help us deliver our current and future plans where they can play a part, such as rolling-out smart water meters, repairing customer-side leaks and replacing customer-side lead pipes.

Further examples of customer and community participation, collaboration, education and co-creation can be found in the 'responsibility' area of our website[26].

2.9. Our PR24 research covers the right topics and customer segments and uses the right methodologies

We have carefully considered our choice of research questions and topics, the customer segments to include and the research methods that would provide the high-quality customer insights needed to develop our business plans and long-term delivery strategy. We describe our choices in Table 2.3.

In choosing which questions and topics to cover we considered the decisions Thames Water planners needed to make to build their plans and the areas on which customers could have a meaningful say, as well as the issues important to customers themselves. The pyramid framework in Figure 2.2 sets out some of the principal components of our plan and the role of customer engagement.

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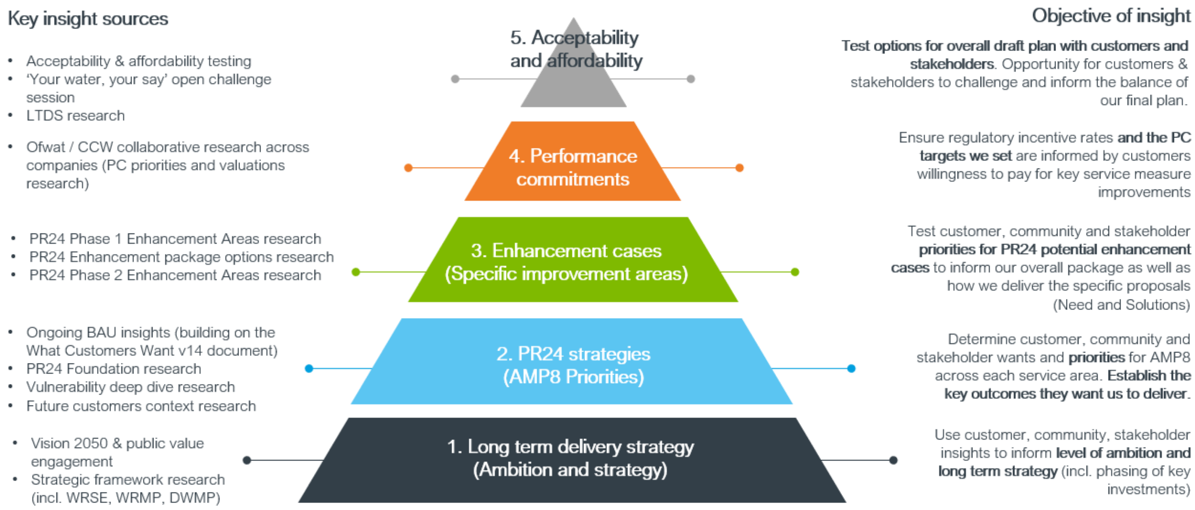
[22] Thames Water Annual Performance Report 2022-23 annual-performance-report-2022-23.pdf
[23] Thames Water Network Protection team, 2023
[24] Smarter water catchment programme report, 2023 river-evenlode-update-2023.pdf
[25] Thames Water Digital Product team, March to July 2023
[26] Examples of collaboration with communities and customers: www.thameswater.co.uk/about-us/responsibility

Figure 2.2: Our framework for PR24 customer engagement



Source: PR24 Insight triangulation and Line of Sight methodology, Sia Partners, August 2023 (see section 8)

Our starting point was to understand the full range of issues important to customers and their key wants, expectations and preferences. Our subsequent research has built on this, focusing on specific areas customers can influence, such as our 2050 Vision and choice and phasing of enhancement investment.

The customer segments we engaged with are summarised in Section 2.3 'We understand the full diversity of our customer base'. Not all topics in our engagement programme were relevant to all customer groups, and we often included customer segments in research studies to ensure inclusivity and representativeness while not necessarily singling them out in the insights, as demonstrated in Table 2.4.

Our expert customer research team have a range of insight methodologies to choose from, whether social media listening, quantitative surveys, face-to-face deliberative discussions or our Thames Water Customer Voices[5] insight community. We detail the strengths and weaknesses of different research methods in our 'Customer Research and Sampling Approach'[27] (included in Section 8) which we consider when selecting the best approach to meet the objectives of the study or suit the type of customers involved.

The result is a robust programme of research that has been commissioned and conducted to address the areas of our PR24 Plan on which customers can have meaningful influence, is inclusive of the diversity of our customer base across our region, using a balance of fit for purpose methodologies (qualitative and quantitative, online and offline) as demonstrated in Table 2.3. We demonstrate in Table 2.4 the comprehensive coverage of topics by customer segment and how research methodologies were adapted to include each segment. In Figure 2.3 we illustrate the inclusive, proportionate geographical spread of customers covered in our research programme.

[27] Customer research and sampling approach 2023, Thames Water, September 2023 (included in Section 8)

Table 2.3: Our choice of topics, segments and methodologies

Choice of topic or research question and rationale	Choice of audiences and segments and rationale	Choice of methodology and rationale
1. Long term delivery strategy		
2050 Vision[28]. We wanted to know whether we had accurately interpreted customers' expectations for the future in our 2050 Vision. We also wanted to understand how customers prioritised the various long-term outcomes to help inform our strategic roadmap and the phasing of the delivery of outcomes to 2050.	We wanted a good cross section of household, non-household and future customers to give their feedback on this topic as it was so all-encompassing and future-facing. The large qualitative sample was broadly representative across demographics, firmographics, locations, health and circumstantial vulnerabilities. The online approach enabled individuals to take part that may not have normally had the time, ability or inclination to attend face-to-face research.	We chose to use multi-day online deliberative insight community activities, using our Thames Water Customer Voices[5] platform. This enabled us to gather in-depth feedback on the long list of 2050 Vision outcomes. We included customers who had previously participated in research community activities and some who were newly recruited – a mix of informed and less informed customers – to understand if this factor influenced views. With COVID pandemic restrictions having only just been lifted, face-to-face discussions were not an option for this study. We complemented the qualitative research with a quantitative survey allowing for a statistically robust view and a topic ranking exercise.
Public value[29]. We wanted to understand which aspects of our public value investment framework are most important to customers and to understand which types of public value they thought we should focus on. The outputs will influence the development of our public value investment framework. They also provide insights on outcome prioritisation to inform our business plans.	Please see '2050 Vision' explanation (previous table row).	Please see '2050 Vision' explanation (previous table row).
Water Resources Management Plan (WRMP)[30] and Water Resources South East (WRSE) Regional	We ensured a good cross section of household, non-household and future customers gave their feedback on this topic due to its future-facing	Multiple methods were chosen during this programme of research including more online based qualitative and quantitative research at the start of the programme which was conducted

[28] Vision 2050 research, Verve, April 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/vision-2050-may-2022.pdf
[29] Public value research, Verve, April 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/public-value-may-2022.pdf
[30] WRMP consultation, customer research, Verve, May 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/water-resources-management-plan-consultation-customer-research-may-2023.pdf

Plan[31][32][33][34]. We needed evidence of customer prioritisation of principles, policies and solutions for a future regional plan to manage water resources to 2100, and customer support for Strategic Resource Option investments that will safeguard service levels and the environment for future generations. We consulted with both customers and stakeholders on our own WRMP.	nature, and the importance across the whole of the South East of England. Qualitative samples were broadly representative of household and non-household customers in the South East/Thames Water area across demographics, firmographics, locations and vulnerabilities. The quantitative samples were statistically representative of the South East/Thames Water customer base. Some research modules included future customers and digitally excluded customers.	during the COVID pandemic, moving to more face-to-face methods later on. A series of studies worked through the principles, policies and solutions for the regional water resources plans, and honed-in on specific elements of the Strategic Resource Options. For our own WRMP consultation, to ensure we heard from customers as well as stakeholders we used our Thames Water Customer Voices[5] community platform. This allowed for spontaneous then more considered reactions to the different elements of the plan.
Drainage and Wastewater Management Plan (DWMP)[35][36]. We needed to prioritise from a number of planning objectives then assess support for the main solutions to address long term drainage and wastewater related challenges. This was followed by a plan preference test and a public consultation.	This topic required a good cross section of household, non-household and future customers to ensure rounded feedback on this future-facing plan. Samples were broadly representative across demographics, firmographics and vulnerabilities, as well as location, enabling area specific information to be shared with those in London and Thames Valley and Home Counties.	We chose online focus groups to allow for in-depth discussion of the plan elements, followed up with an online quantitative survey allowing for a statistically robust ranking of the importance of the different plan elements. For the DWMP consultation, to ensure we heard from customers as well as stakeholders we used an online quantitative method to capture their views and preferences on the plan.

[31] WRSE Best value criteria, eftec, May 2021 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/water-resources-south-east-best-value-criteria-may-2021.pdf
[32] Added value of Strategic Resource Options, Accent, November 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/strategic-resource-options-preferences-on-added-value-for-strategic-schemes-november-2022.pdf
[33] New sources of water, BritainThinks, June 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/strategic-resource-options-communicating-changes-to-water-supply-june-2022.pdf
[34] WRSE Regional Plan Preferences, eftec, August 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/water-resources-south-east-regional-plan-preferences-for-thames-water-august-2023.pdf
[35] DWMP customer research, eftec, November 2021 https://www.thameswater.co.uk/media-library/home/about-us/regulation/drainage-and-wastewater/appendix-h-customer-engagement.pdf
[36] DWMP customer consultation, eftec, September 2022 https://www.thameswater.co.uk/media-library/home/about-us/regulation/drainage-and-wastewater/non-technical-summary.pdf

2. PR24 strategies		
Foundation insights[37]. Our first step in our PR24 research was to understand the full range of issues important to customers, their expectations of us, and relative priorities, unconstrained by cost or other limiting factors. The outputs acted as the starting point for our comprehensive insight framework, identifying key customer wants. This helped inform our 2050 Vision (our long-term company ambition) and the phasing of improvements in service over the coming AMPs. It also helped us identify the right performance measures and other elements of our emerging PR24 Plan.	It was important to include all segments because we wished to understand the full range of issues important to customers. The historical, ongoing and social listening modules covered all segments. The new customer research initially included household bill payers broadly representative across demographics, locations, health and circumstantial vulnerabilities, and was later supplemented with research among non-household and future customers. The online approach enabled individuals to take part that may not have normally had the time, ability or inclination to attend face-to-face research.	Because we were seeking to understand the breadth of issues we employed a variety of methods and triangulated the outputs to provide a robust evidence base. We made use of our comprehensive historical and ongoing customer, community and stakeholder insights evidence base – but it was important we also gathered fresh insights to ensure our understanding was up to date. Large scale social listening was a powerful way of capturing unsolicited perspectives from a multitude of different audiences. We complemented this with solicited feedback using qualitative research among our Thames Water Customer Voices[5] community. This research was undertaken during the COVID pandemic period, which was one factor in choosing an online approach. Ethnographic customer videos helped us bring the customer voice directly into the business.
Vulnerability affordability and propositions deep dive[38] . While our understanding of vulnerability was good, we identified a customer segment relatively under-represented in previous research: customers with health, situational or financial vulnerabilities, particularly from minority ethnic communities and non-English speakers. Hearing from this segment helped us to make improvements or make plans to ensure our ongoing and future service will meet the needs of all customers. Topics focused on issues of particular relevance to this segment – day-to-day service requirements, affordability and priority	We wanted to speak to specific types of potentially vulnerable customers who were under-represented in past research. We carefully considered what our region looks like in terms of vulnerability risks factors. We focused on customers in particular communities and backgrounds with health, situational or financial vulnerabilities. Minority ethnic communities were a particular focus following extensive analysis of the latest Census data. Demographics, locations and digital exclusion were represented in line with the specific communities sampled.	We chose one-to-one qualitative in-depth interviews as the best way to engage with this audience. In order to reassure customers they would be safe and in control in this research, they could choose their preferred method of interview (face-to-face, online or telephone). Interviewers were matched to speak the same dominant language as the customer being interviewed.

[37] PR24 Foundation research – Thames Water Customer Voices and Twitter analysis, Verve, November 2021 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/foundation-november-2021.pdf

[38] Vulnerability deep dive, Community Research, March 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/vulnerability-march-2023.pdf

service provisions – rather than generic business plan-wide issues.		
Future customers context research[39]. We had involved future customers in many other PR24 studies, but not satisfactorily discovered the context for their views and priorities, so we conducted a stand-alone study to focus on their wider concerns, to see how water and wastewater fit into their world.	We decided to involve three different cohorts of younger customers between the ages of 18 and 30 so we could understand the stages of moving towards being a bill payer; from the youngest still studying and living with family or renting, to those who have started paying their own water bills. Respondents were recruited to represent different demographics and locations.	We chose to use an online workshop method, having learnt from other research that online suits this segment better for research – this meant those recruited were more likely to attend and engage in the research. The workshop structure allowed the cohorts to have discussions between themselves and also to mix together to share experiences, which helped us understand how different concerns evolve.
3. Enhancement Cases		
Enhancement area deep dives[40] [41]. A key area in which customers can have a meaningful say is discretionary enhancements. We needed strong evidence of customer support for both the need for investment and the potential solutions/options. We conducted two phases of research to explore views in areas where we anticipated discretionary enhancement investment might be required to improve (or maintain) service for customers. The two rounds of research reflected the different pace at which different investment cases were developed and ready for customers to make a judgement on. The research primarily focused on the merits of individual enhancements, but we also gathered indications of relative importance, which was helpful	The topics were focussed on the core water and wastewater service and the environment so we wanted a good cross section of household, non-household and future customers to give their feedback on these potential future improvements. The topics were also discussed with groups of stakeholders including local government and community groups. The sample was broadly representative across demographics, firmographics, locations, health, circumstantial and financial vulnerabilities. We decided not to include digitally excluded customers in the initial qualitative research, in part because some COVID pandemic restrictions were still in place. For the second phase of research a module of digitally excluded customers was	We chose to use multi-day online deliberative insight community activities, using our Thames Water Customer Voices[5] community platform. This allowed a considered deep dive into each topic, where detailed background information could be shared so informed judgements could be made. It involved a mix of customers who had previously participated in our research community activities and some newly recruited, so a mix of informed statuses. In the second phase of research a number of the topic areas were also discussed in a quantitative survey, allowing for a less-informed customer perspective to be heard. A telephone version of the online quantitative survey allowed for digitally excluded customers to be included.

[39] Future customers context research, Accent, August 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/future-customers-context-august-2023.pdf
[40] PR24 Enhancement area deep dives, Verve, March 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/enhancements-march-2022.pdf
[41] PR24 Additional enhancement area deep dives, Verve, June 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/enhancements-june-2023.pdf

in informing decisions on which to prioritise and so the phasing of enhancements.	included in a telephone version of the quantitative survey.	
Enhancement package options[42]. As well as understanding views on individual enhancement options, it was important to explore customers' preferences for different packages of enhancement investments. The focus was on different combinations of service levels and how they contributed to the overall customer bill. The outputs have informed our choices around which potential Enhancement Cases to prioritise. Topics included were those Enhancement Cases that were either discretionary enhancements, or statutory enhancements where there was scope to do more and go further than the minimum. We didn't include any areas where there was no scope to change what was delivered and when.	The topics were focussed on the core water and wastewater service and the environment so we wanted a good cross section of household, non-household and future customers to share their priorities for potential future improvements. The qualitative sample was broadly representative across demographics, firmographics, locations and vulnerabilities, including digitally excluded customers. The quantitative sample was statistically representative of the Thames Water customer base.	As COVID pandemic restrictions had recently been lifted, we chose face-to-face deliberative workshops and face-to-face depth interviews (with non-households only) to allow for in-depth discussion of the detailed package proposals, to give us a more informed view of customer preferences. The online quantitative survey allowed for a statistically robust view from a less informed (and more typical) customer perspective.
4. Performance Commitments		
Ofwat-led research on common Performance Commitments and ODI rates[43]. Ofwat's central research has been used to inform each water company's ODI rates. This means customer preferences have been included in our models to determine our Performance Commitment targets and where we focus our efforts and investment in AMP8.	Research with household and non-household water customers across England and Wales.	A statistically robust quantitative approach.

[42] PR24 Enhancement package options, BritainThinks, September 2022 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/enhancement-packages-september-2022.pdf
[43] Priorities and ODI rates research, Ofwat, 2022 and 2023 https://www.ofwat.gov.uk/regulated-companies/customer-engagement/pr24-collaborative-customer-research-steering-groups/

5. Acceptability and affordability		
Acceptability and Affordability testing[44] [45] To help us choose the right size and composition for our PR24 Plan, we wanted to understand customers' preferences for different service and bill packages. By undertaking iterative stages of testing, we were able to refine our plan in response to customers' feedback. In the first phase of qualitative research we chose to go beyond the Ofwat minimum two options and test three different versions of the business plan. The versions included a 'must do' option which only included work required by law, and two other options which included extra work not required by law to provide extra benefits. The three options gave customers a choice between minimum and maximum plausible bill options and also different combinations of service levels. Using the detailed acceptability and affordability feedback received, we refined one final plan for testing in the quantitative phase of the research. For each version of the plan, we included up to six proposed service enhancements that are the biggest drivers of changes in bills and where there is flexibility in when and/or how they are delivered so that the bill impact can be spread in different ways from 2030 – 2050. Including these discretionary elements gave customers meaningful choices about the levels of service they want to	In the qualitative research we covered all household, non-household, future and vulnerability segments, in line with Ofwat and CCW's guidance. We chose to represent the vulnerability groups marked as optional, to ensure inclusivity in our research. These vulnerable groups included customers who receive the benefits of our social tariff, as well as low-income customers who struggle, or are at risk of struggling, to pay their bills. This allowed us to understand views on the affordability of our plan for all types of customers, including those at greatest risk from any increase in bills. The quantitative research also included household, non-household, vulnerable customers, customers who receive the benefits of our social tariff, as well as low-income customers who struggle, or are at risk of struggling, to pay their bills. Future customers were not included, in line with Ofwat and CCW's guidance. Customer profile details on demographics, vulnerabilities and firmographics were captured to allow for representative weighting of results.	Much of the methodology was prescribed by Ofwat and CCW. In the first phase of qualitative research, customers were provided with information in a deliberative setting, giving them a greater understanding of our proposals, enabling them to provide a more considered view on the different versions of our plan. The quantitative phase gave us a less informed, more typical view, on the acceptability and affordability of our final plan. We chose to hold face-to-face deliberative workshops and depth interviews for the qualitative stage as we felt this was a better approach for customers than online, given the volume and complexity of information and the relatively long duration of the sessions. To ensure customers with health vulnerabilities taking part in individual interviews felt comfortable and able to fully engage with the research, we chose to offer the option of holding interviews in a location chosen by the customer (at home, in a neutral location or online) as well as having a friend/relative/carer present or conducting the interview by telephone. For the quantitative phase, in addition to the online survey, we chose to include telephone interviewing

[44] PR24 Acceptability & Affordability Testing qualitative report, Accent, May 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/acceptability-and-affordability-testing-qualitative-may-2023.pdf
[45] PR24 Acceptability & Affordability Testing quantitative report, Accent, September 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/acceptability-and-affordability-testing-quantitative-september-2023.pdf

receive and the associated impact on their bills, both in the short and longer-term.		for the non-household segment as this often achieves better response rates than online methods alone. For households, invitations to complete the survey were sent via email and post, with the additional option to request a paper version of the survey and any other assistance that would help customers with specific needs to take part e.g. questionnaires on coloured paper; telephone or face-to-face interviews.
Shaping our long-term delivery strategy (LTDS)[46]. We commissioned focussed LTDS research, as well as using the insight gathered from our 2050 Vision, WRMP, DWMP and Enhancement Area & Package Options research to inform the phasing of enhancement investments over future AMPs. In the LTDS research we tested with customers example options for the mix and sequencing of the key investments and outcomes to 2050, theoretical options for phasing investment and bill impacts over the longer-term, and whether an indicative example bill profile for our proposals to 2050 was considered to be fair and affordable for current and future customers.	The research included household, non-household, future and vulnerable customers, and customers who receive the benefits of our social tariff, as well as low-income customers who struggle, or are at risk of struggling, to pay their bills. Given the topics involved in the research and the focus on our longer-term proposals, we chose to increase the number of future customers included in the research to match the number of current household customers. So that we were able to obtain a slightly more educated view and build on the knowledge and understanding from previous research, we chose to re-recruit participants from the qualitative phase of our Acceptability and Affordability testing. The majority of future customers were freshly recruited due to the increased sample size required for this segment.	We chose to use online focus groups to increase participation rates of future customers, which were a large proportion of the overall sample size. This method was also more suitable for large non-household customers and some customers with health vulnerabilities. Qualitative focus groups allowed in-depth discussion of our long-term proposals and the various options for phasing investments and bill increases over the 25-year period. We included some customers who had previously participated in acceptability and affordability research and newly recruited future customers – a mix of informed and less informed customers – to understand if this factor influenced views.

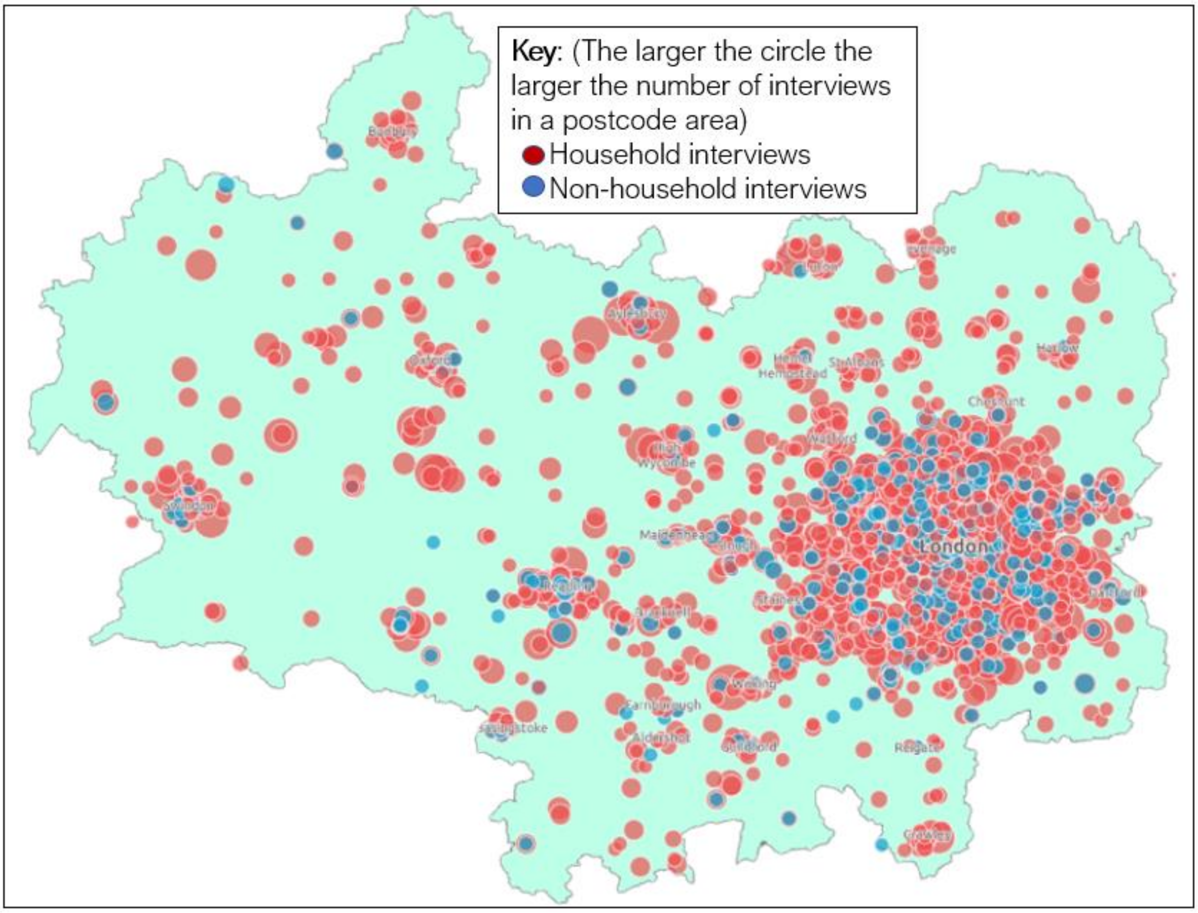
[46] Long-term delivery strategy research, Accent, September 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/long-term-delivery-strategy-research-september-2023.pdf

Table 2.4: Diversity of our customer engagement programme by audience segment: topics covered and methodology adaptations

Audience segment	Topics covered						Methodology adaptations
	Water service	Wastewater service	Customer service	Fair & affordable	Thriving environ-ment	Part of community	
Household customers (geographies, service types, demographics)	Yes	Yes	Yes	Yes	Yes	Yes	A balance of multiple methods allowed good representation across different demographics
Customers in vulnerable circumstances	Yes	Yes	Yes	Yes	Yes	Yes	
Under-represented customers (e.g digitally excluded, non English speakers)	Yes	Yes	Yes	Yes	Yes	Yes	Some studies offered alternate participation methods to ensure under-represented groups could be heard, e.g. using non-English language interviewers or phone/face-to-face for the digitally excluded
Future customers	Yes	Yes	Yes	Yes	Yes	Yes	Online was found to be the preferred/most effective method of engagement for this segment
Non-household customers (geographies, firmographics)	Yes	Yes	Yes	Yes	Yes	Yes	A balance of multiple methods allowed good representation across different firmographics
Developers, self-lay providers, NAVs	Yes	Yes	Yes	Yes	Yes	Yes	Existing ongoing engagement methods were used to gather insights from these segments, e.g. online, and face-to-face forums and meetings
Retailers	Yes	Yes	Yes	Yes	Yes	Yes	
Stakeholders and local/ shared interest communities	Yes	Yes	Yes	Yes	Yes	Yes	

Key: Green=strong coverage, Blue=less strong coverage or segment included in research but results not always singled out
Source: Thames Water, Customer Research & Insight and Stakeholder Relationship teams

Figure 2.3: Geographical representation of household and non-household customer interviews for key PR24 research, proportionate to population density across our service areas[47]



Source: Key PR24 studies including Foundation, Enhancement Area Deep Dives (Phase 1 and 2), Vision 2050, Public Value, Enhancement Package Options, Acceptability and Affordability Testing (qualitative and quantitative), Verve/BritainThinks/Accent, 2021-2023

2.10. We invited challenge and assurance on the quality of our research

Challenge of customer research

We detail how our Customer Challenge Group (CCG) has challenged our engagement and its application in Section 5. Similarly, we explain how our Board has overseen our customer engagement and provided assurance on its quality and use in Section 6.

A particular focus of our CCG's challenge on customer engagement has been around inclusivity and ensuring we understood and responded to the diverse needs of our customers, particularly those who are in vulnerable circumstances. We demonstrate in Table 2.5 examples of these and other specific challenges received on individual research studies, and how we responded in order to improve the quality of our research.

[47] This map shows our research participants spread across our region but clustered in the major population centres, including London where around 60% of our wastewater and 70% of our water customers live.

Table 2.5: Examples of how we responded to CCG challenges on the quality of our research

CCG feedback	Thames Water's response
Enhancement Package Options research: Face-to-face qualitative workshops where both household and non-household customers were in the same room meant that non-households may not have always responded as a business representative.	While not so material as to warrant redoing the research, in subsequent face-to-face workshops we ensured that household and non-household research was conducted in separate rooms or at separate times, to ensure the different customer groups responded in the correct context. This approach was for instance used in the Acceptability and Affordability Testing qualitative research.
Affordability & Acceptability Qualitative Research: Challenge on the timing of the face-to-face events taking place during the week and how to ensure that different groups such as parents and carers are represented.	We took advice on dates and times from the experienced specialist recruitment partners, who weighed up these matters carefully. No day of the week, or time of the day would be good for everyone, so we attempted to find a best fit for the customers we were trying to recruit. We also offered high incentives for the events to make sure the financial cost of participating (e.g. alternative care arrangements) did not prevent people from taking part.
Vulnerability Deep Dive Research: Feedback on the interviewing sampling profile, there should be a different balance of ethnic minority/white interviews.	A revised sample framework was devised to address this feedback, to better understand the views and feedback of under-represented communities. The key revision being the balance of ethnic minority/white interviews: which changed from a split of 35/40 interviews to 50/25 interviews. We felt it important to maintain some interviews with white groups (British and other, including recent migrants), to enable us to compare and contrast experiences of vulnerability risk factors across ethnicities. This gave us an indication of what needs and experiences are common to all participants facing various risk factors and which relate specifically to race, culture and ethnicity.
Enhancement Case Research: A challenge on neutrality across the enhancement options tested, for example, trunk main bursts where stimulus material described magnitude of harm i.e. deaths, insurance claims, a quote about an old person who could potentially drown. Other enhancement options were not framed in these emotive terms.	We removed the emotive quote from the trunk mains bursts materials, and as the stimulus materials were created for the other Enhancement Cases a similar structure and tone of information was used, ensuring neutrality across them all.
Long Term Delivery Strategy Research: Concern that given recent press coverage of Thames Water (July 2023), how this would be contextualised within the results, if at all.	We agreed this was a valid concern and that, as with all our research, the context and timing of fieldwork may have an influence on customer perceptions of Thames Water and their views on our proposals, which would be reflected in the reporting. We felt the agency conducting the research should not risk being perceived to be trying to defend Thames Water, so we decided against any additional stimulus materials that might have side-tracked discussions. The agency was however given explanations and answers to likely questions from customers.

Assurance of customer research

We have relied on several ongoing 'lines' of assurance. For the quality of our research this includes our research agencies, overseen by our expert team of inhouse researchers. Our research agencies provided assurance on the PR24 research projects they conducted by including a declaration within their final reports to demonstrate how they met Ofwat's minimum standards for high quality research. The nature of these declarations is summarised in Table 7.2.

To support the Board in assuring that our customer engagement and its application met the required Ofwat standards, we appointed independent outside experts, Savanta, to review our engagement evidence. In their April 2023 Phase A interim assurance report, Savanta made several optional recommendations for further improvements to our evidence, which were reported to the Board. The Board required us to address all recommendations ahead of submitting our PR24 business plan, which we have done. This included the most material improvement of doing more research with under-represented customer segments, such as future customers, the digitally excluded and non-English speakers, as well as better reporting the views of these segments. Table 2.6 shows a summary of Savanta's recommendations, how we actioned them, and how Savanta subsequently acknowledged this in their Phase B and C interim assurance reports in August and September 2023[48].

Table 2.6: How we addressed recommended assurance actions

Savanta's Phase A recommendation	Thames Water's action	Savanta's Phase B and C review
1. Demonstrating compliance with the correct interpretation of 'contextualised' (as per Ofwat guidance)	Research reports were updated to refer only to the type of contextualisation that Ofwat outlines.	Savanta's Phase B assessment found the updated reference to 'contextualised' was in line with Ofwat's definition.
2. Better acknowledging potential bias introduced by research stimulus	Four instances of potential bias found (specific enhancement options presented with unbalanced pros and cons, not considered to be a material issue, as presented alongside wider information). The affected research reports and related references to insights in WCCSW (and Line of Sight documents) highlight these potential biases.	Savanta's Phase B assessment found the WCCSW document was clearly updated with adequate notes to highlight cases of potential bias.
3. Avoiding quoting percentages in qualitative research reports	Research reports and WCCSW were updated with caveat notes to flag percentages quoted are based on qualitative samples.	Savanta's Phase B assessment found individual research reports and the WCCSW document was updated with adequate notes which highlight the use of percentages as indicative only.
4. Making the Insight Triangulation key clearer	See Table 3.15: How we addressed recommended assurance actions for triangulation and Line of Sight	
5. Improving non-household customer quantitative sampling approach (with	We put in place improved ways to sample and weight non-household customers in quantitative research, to allow better comparison of different company sizes in future.	Savanta's Phase C assessment found the updated 'Customer research and sampling approach August 2023'

[48] TMS50 Customer Engagement Assurance Phase D, Savanta, September 2023

reference to company size quotas)		outlined how non-household sampling had been amended from August 2023 onwards to take a more detailed approach to both company size and site numbers. It also noted that 'the smaller quotas for company size (50-249 and 250+ employees) could be over-sampled and then down-weighted within overall results' which is industry best practice.
6. Better demonstrate isolated views of customer segments in analysis (namely customers in vulnerable situations, non-household customers and future customers)	Research reports were updated to highlight any differences in customer segments, or to state that no segment differences had been found if that was the case. Insights for key customer segments, including customers in vulnerable situations, non-household customers and future customers, have been detailed in a customer segments section of What Customers, Communities and Stakeholders Want (WCCSW).	Savanta's Phase B assessment found key customer segments were expanded on in an updated version of WCCSW which drew on key insight sources.
7. Giving voice to the digitally excluded. The programme contains few examples of face-to-face research which means that digitally excluded customers are less represented in the research programme.	We disagree that 'few' projects include this segment. We engaged with the digitally excluded segment throughout the PR24 engagement programme, with a mix of telephone and face-to-face research. This was demonstrated with a list of 11 research projects which included digitally excluded customers. Insights from the digitally excluded segment feature in WCCSW as a sub-set of the vulnerable customers segment, covering the topics of: • Priority services support • Affordability support • Water supply resilience • Enhancement Cases • Acceptability & Affordability testing	Savanta's Phase C assessment found that digitally excluded customers had also been engaged in a wide range of research projects as outlined (in a list of 11 projects itemising where digitally excluded customers had been interviewed). For example, Thames Water's 'CX113 Vulnerability Deep Dive' engaged those who are digitally excluded via face-to-face interviews.
8. Including non-English speakers and those with English as a second language in customer insights	Over 90% of our customers can speak English well[49], so for reasons of cost and proportionality we don't typically translate materials into other languages. However, to ensure our PR24 programme as a whole was inclusive, including for potentially vulnerable customers who can't speak English, we conducted a Vulnerability Deep Dive[50], from which insights have been reflected in WCCSW,	Savanta's Phase B assessment agreed that it would not be a good use of resource to include this audience in every piece of research. It noted that Thames Water's 'Vulnerability Deep Dive' project engaged with

[49] Non-English speakers (those with another main language who don't speak English well or at all) make up 5% of our London population and 1% of Thames Valley & Home Counties population. Source: UK Census local authority data, Office for National Statistics, 2021.
[50] Vulnerability deep dive research, Community Research, March 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/vulnerability-march-2023.pdf

	as a sub-set of the vulnerable customers segment. We also started to identify and analyse the views of customers with English as a Second Language in our brand perceptions tracking study.	customers with English as a Second Language and partnered with organisations and interpreters in order to engage with these customers fully.
9. Comprehensive future customer engagement to gain a more robust and meaningful view from this customer group	We included future customers in several PR24 research projects as well as our ongoing brand perceptions research. Insights from these have been detailed in the customer segments section of WCCSW, drawing on research on: • Enhancement Cases • Vision 2050/Public Value • Acceptability & Affordability testing • Future customers context setting • Long term delivery strategy	Savanta's Phase B assessment found that engagement with future customers, and analysis of future customers' views as a customer segment demonstrated Thames Water's engagement with this customer group.

3. Line of sight from what customers want to our PR24 plan

3.1. Line of Sight is the guiding principle for our customer engagement

We recognise that Ofwat expects us to take account of customers' views in our business plans and long-term delivery strategy. To meet this expectation we have developed a Triangulation and Line of Sight approach, by which we synthesise insights from high-quality customer research and other sources, balance these insights with other planning considerations and constraints, and then document how the insights have informed different aspects of our PR24 Plan.

In this section, we demonstrate the overall line of sight for our PR24 business plan. This covers an overview of our framework, the key insights gathered and how they have been used to inform our decisions. We also include reference to other documents across our plan with line of sight sections where we demonstrate the use of customer evidence when making decisions and how our plan responds to customer, community and stakeholder feedback.

3.2. We have developed a robust approach to Triangulation and Line of Sight

Triangulation in the water industry is the means of using multiple independent measures to examine a hypothesis or conclusion being investigated which demonstrably avoids confirmation bias and maximises the validity of the decisions being made.

The broad overarching principles of effective triangulation include: strategic planning, research expertise and understanding, proportionality to investment decisions, and transparency. To utilise the maximum potential of a wide range of evidence sources and validate findings effectively, triangulation needs to be an ongoing and iterative process that occurs throughout the key stages in business plan development. Furthermore, the evidence of triangulation needs to be presented in a manner that clearly demonstrates the Line of Sight between customer & stakeholder evidence and proposals.

For PR24, Ofwat stated in its Engagement Policy[11] that as well as meet the standards for high-quality research, we are also expected to apply best practice for triangulation of customer data from alternative sources, with reference to CCW's triangulation report[51].

CCW has outlined a set of criteria for what good triangulation should look like at PR24. These core principles act as a minimum benchmark for companies but avoid prescribing specific methods. The six recommendations for triangulation at PR24 are provided below:

1. Engagement and triangulation should be an ongoing process
2. Triangulation should make use of a wide range of inputs, and these should not be solely engagement insight
3. Triangulation should be informed by a transparent and consistent weighting framework
4. Balanced decisions should be at the core of triangulation
5. Validation of findings should make use of a wide range of datasets.
6. Companies should seek independent assurance of their process and outcomes.

[51] Triangulation: A review of its use at PR19 and good practice, Sia Partners for CCW, May 2021

We commissioned Sia Partners, the authors of CCW's report on triangulation, to help us devise and implement an approach to triangulation that meets Ofwat's expectations. The approach developed follows best practice guidance from CCW and incorporates additional elements used by other water companies at PR19 and energy networks during the RIIO-2 price control. We set out full details of the above process in our PR24 Triangulation and Line of Sight methodology document[52].

Figure 3.1: Triangulation and Line of Sight framework

Source: PR24 Insight triangulation and line of sight methodology, Sia Partners, August 2023 (see section 8)

We have designed an approach that enabled ongoing, iterative triangulation at several stages as we developed our PR24 plan.

We make use of a wide range of inputs, that go beyond solely engagement insights. We have provided Sia Partners with 320 insights sources including PR24-specific research, research from PR19, ongoing insight gathering and insight from relevant external sources. A full list of sources used is available in our What Customers, Communities and Stakeholders Want (WCCSW) document[53], which is our single unifying customer insight framework, underpinned by detailed insight. We demonstrate how we have incorporated additional insights into our WCCSW report over several iterations of the business planning process in Table 3.1. In WCCSW, we also highlight when key tensions emerge where customers, communities and stakeholder views do not align. This provides us with the discrete views of different groups and sources of evidence to be addressed alongside each other through the Triangulation and Line of Sight process.

Each insight source is scored using a transparent and consistent system that assesses the robustness of the engagement activity and feedback gathered. The methodology is based on 'The Magenta Book' guidance for qualitative evaluation by HM Treasury. We document this process and provide detail of how different sources have been used to inform key areas of the plan in our Engagement Summary (ES) documents[54]. These summaries provide an overview of the engagement undertaken for each core area of the business plan (Water, Wastewater, Customer), where insights have been drawn from and how different sources have been triangulated to develop key insights.

The overarching objective of our PR24 business plan triangulation process is to come to balanced decisions about proposals based on customer and stakeholder insight alongside other

[52] PR24 Insight triangulation and Line of Sight methodology, Sia Partners, August 2023 (see Section 8)
[53] TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023
[54] PR24 Water, Wastewater, Customer Service Engagement Summaries, Sia Partners, September 2023 (Section 8)

factors and constraints. This link from engagement evidence to our proposals is demonstrated in Line of Sight sections in various documents across our business plan, as referenced in Table 3.5.

3.3. Our phased, iterative approach to triangulation enables us to understand how views have evolved over time

Our phased approach to triangulation has enabled us to develop an understanding of customer views over time. We have aligned the triangulation phases to our wider engagement programme which consisted of specific outcomes and research questions at each stage.

Table 3.1: Our phased, iterative approach to triangulation

Triangulation Phase	Key insight sources	How we triangulated the insights in WCCSW
Bronze WCCSW v15 January to May 2022	Existing insights (building on the What Customers Want v14 document) PR24 foundation research PR24 Phase 1 Enhancement Areas research	WCCSW v15 established a consistent and robust evidence base for our PR24 business plan decision making process. At this stage, we established our initial view of what customers, communities and stakeholders want, broken down into 15 Wants underpinned by 31 Expectations. We also identified key areas of tension between different customer groups, sources and regions and highlighted these in our report. This informed further research, was considered throughout our planning process (see Table 3.13 on tensions) and was updated in future iterations of WCCSW as further insights were gathered.
Silver WCCSW v16 June to September 2022	Vision 2050 research including customer support and prioritisation of Thames Water's long-term goals Public Value framework research including prioritisation rankings of key activities Ofwat / CCW PR24 collaborative research, including emerging customer preferences on common Performance Commitments Further ongoing engagement such as brand surveys, C-MeX, Bin It Don't Block It campaign Insight from stakeholders from Local Government, local advocacy groups, and communities	WCCSW v16 established a relative priority ranking of the 15 customer Wants by triangulating scores from several sources where customers ranked priorities including PR24 foundation research, PR24 enhancement deep dives, Ofwat collaborative research and V2050 research. We also refined and merged several Wants and Expectations, aligning customer priorities today with feedback on our longer term vision. We identified key areas of tension between different customer groups, sources and regions and highlighted these in our report. This informed further research, was considered in our planning process (see Table 3.13 on tensions) and updated in future iterations of WCCSW.
Gold WCCSW v17	PR24 enhancement package options research – including relative prioritisation of PR24 Enhancement Cases	In WCCSW v17, we consolidated the 15 Wants and Expectations from WCCSW v16 into 10 overarching Wants directly related to the Outcomes customers

October 2022 to March 2023	Further strategic planning engagement such as Water Club Strategic Resource Options, Drainage and Wastewater Management Plan (DWMP) research and Water Resource South East (WRSE) research Further ongoing engagement such as brand surveys, C-MeX, marketing campaigns and vulnerability insight reports	expect us to deliver at PR24. These formed the framing of our final PR24 plan. We also assigned a relative priority ranking of our PR24 enhancement areas by triangulating scores from PR24 engagement sources where potential Enhancement Cases had been ranked. We have produced documents for each enhancement area, which summarise customer insight in support of both the need for the enhancement, as well as the solutions proposed where this has been tested with customers.
Platinum WCCSW v18 April 2023 to September 2023	PR24 Phase 2 Enhancement Case Deep Dive Research Acceptability and Affordability Testing (AAT qualitative findings) 'Your Water, Your Say' open challenge session – May 23 Vulnerability Deep Dive Research DWMP and WRMP Consultations Further emerging findings from external industry research Future bill payers customers context research Final outputs from Ofwat and CCW collaborative research on ODI rates Innovative tariffs research Acceptability and Affordability Testing (AAT quantitative findings) Long-term delivery strategy (LTDS) research	In WCCSW v18, we updated our ranking of Wants and Enhancement Cases following a triangulation of new research findings with the previous customer priority rankings. This included the final outputs from Ofwat / CCW collaborative priorities research used to inform ODI rates. We included the findings from the qualitative Acceptability and Affordability Testing of our overall plan. This provided summaries for each of the tested areas (Enhancement Cases and Performance Commitments), mapped to the relevant Wants and Outcomes. We also gathered views from our future bill payers through targeted research to supplement our AAT qualitative findings. We incorporated customer and stakeholder views from our 'Your Water, Your Say' open challenge sessions and documented how these were used to inform our PR24 plan. We continued to improve our understanding of our vulnerable customers through our Vulnerability Deep Dive research. We gained a deeper knowledge of the drivers of vulnerability and how customers in vulnerable circumstances manage their finances, as well as insight into the support mechanisms they rely on and other mechanisms they would like to be available to them. We undertook in-depth research with customers and stakeholders to gather their views and priorities to inform our WRMP and DWMP plans. We have incorporated these insights to inform the key insights for the wider plan. Finally, we incorporated the findings from our quantitative PR24 acceptability and affordability testing in WCCSW and the final business plan, demonstrating customer acceptance levels of our proposals. We also included the findings from our LTDS research, including customer preferences on options for the mix and sequencing of the key investments and long term bill impacts to 2050, in WCCSW and our long term deliver strategy.

3.4. We understand the societal context behind our customer engagement

We have been mindful of the potential impact of media coverage and topical issues on the preferences and priorities expressed by customers in our research, particularly given the increased scrutiny our sector and our company have faced in recent years. This is a situation we believe underlines the need to rely on more than one study that looks at customers' relative priorities for their water & wastewater service and to triangulate findings over time. This is the approach we have taken, having conducted around half a dozen such research studies between October 2021 and May 2023 to inform our PR24 decision making.

We track media and social media coverage and through our always-on brand survey we understand which issues are most salient for customers. Throughout our PR24 customer engagement programme we have noted the backdrop of societal, industry and company-specific issues which may have had a bearing, including the end of the pandemic, concerns about climate change and sewage pollution, the economy and inflation, and drought, leaks and usage restrictions. Issues relating to the cost of living, leaks and sewage pollution in particular have increased in prominence in our area since the last price review.

As particular issues have become more important to customers over time, this has been reflected in the outputs of our triangulation process. While the priority messages we have heard from customers have remained broadly consistent over time, when synthesising multiple insight sources covering the same topics but gathered at different times, we have seen an increase in the overall priority customers give to addressing sewage pollution.

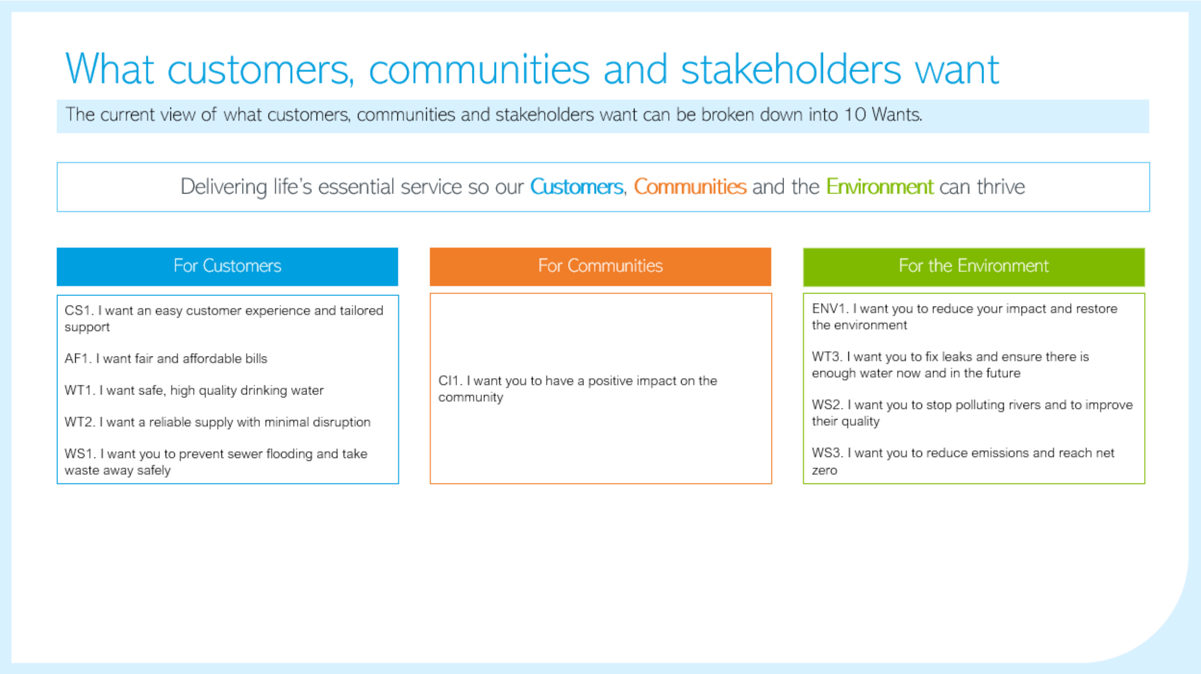
We recognise that the lead times involved in our planning process meant we were unable to capture any effects that might have stemmed from the significant media coverage of Thames Water at the very end of June 2023. We will though continue to consult customers on their priorities for their water and wastewater service, triangulate the findings on an iterative basis and feed them into our decision making.

3.5. We have developed a comprehensive understanding of what customers want

The output of our triangulation is a clear and comprehensive view of the outcomes customers and stakeholders expect us to deliver on their behalf. We have summarised the outputs in our What Customers, Communities and Stakeholders Want (WCCSW) document, (v18.3 September 2023) and included in our PR24 submission as TMS04[55]. Figure 3.2 shows our latest insight framework, setting out what customers, communities and stakeholders want from us.

[55] TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023

Figure 3.2: Insight framework from What Customers, Communities and Stakeholders Want



Source: TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023

The framework consists of 3 key Themes, broken down into 10 Wants. These Wants are then further broken down into topics and sub-topics and underpinned by more detailed insight messages within each area. WCCSW v18.3 also highlights insight from different customer segments and provides a view of customers' relative prioritisation of Wants and Enhancement areas for PR24. Figures 3.3 to 3.5 summarise details of customer expectations for each of the customer wants down to topic level.

Figure 3.3: Detailed expectations on 'for Customers' from WCCSW

Our customers' expectations (1/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For Customers

Wants	Topics	Summary of customers' expectations
CS1. I want an easy customer experience and tailored support	Customer experience	Customers expect to be able to contact us easily, via their preferred channel and to have their queries solved on first contact by knowledgeable staff. If this is not possible, they expect to be provided with the requested information and not have to chase us repeatedly for an answer. During interruptions to our service, customers expect proactivity from us, both in terms of fixing the issue and communicating progress and timescales with them. There is an expectation that our customer services are accessible to all and tailored to the individual needs of different customer types, particularly those in vulnerable situations. Customers expect us to be aware of and empathetic to their situation and respond accordingly in a friendly manner.
	Billing	Customers expect charges on their bills to be transparent and easy to understand. Customers expect us to ensure our bills are accessible to all, including providing inclusive communications e.g. Braille, large print etc.
	Vulnerable customer support	Customers expect us to design services and propositions that help those who could otherwise be disadvantaged due to factors such as low income, mental health challenges or physical disabilities. Vulnerable customers expect us to understand and be able to respond effectively to their specific needs. There is also an expectation for us to better promote the existence and benefits of those services to those who may be eligible, rather than add to the existing available support and services to vulnerable customers.
AF1. I want fair and affordable bills	Affordability	Customers expect us to deliver services which offer good value for money and that we would seek to provide financial support to those who are struggling to pay, particularly in light of the cost-of-living crisis and the likelihood of future bill increases. Customers expect us to be more proactive in contacting them at an earlier stage and better promoting available support. Customers expect their bills to be accurate, consistent (i.e. not higher than they might be expecting) and for any significant increases to be communicated to them in advance.
	Social tariffs	Customers generally accept the need to help those who struggle to pay their bills, and expect us to provide discounted tariffs which they are generally willing to contribute towards. They expect us to better promote all forms of financial support, including discounted tariffs, to those who are eligible.

Our customers' expectations (2/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For Customers

Wants	Topics	Summary of customers' expectations
WT1. I want safe, high quality drinking water	Water quality	Customers expect to be provided with high quality, safe drinking water and place a high priority on ensuring no deterioration in service. Customers want to see action from us to replace lead pipes, particularly when informed about the health risks to children. Most are dissatisfied with the hardness of their water, however, instead of wanting water to be softened centrally, they expect advice and information from us about how to deal with and reduce it in their homes.
WT2. I want a reliable supply with minimal disruption	Water supply interruptions	Most customers have not experienced significant supply issues in the past, however, customers expect us to maintain and improve the network so that it functions 24/7 with minimal disruption; they expect that it 'just works' and that they rarely have to think about or interact with us. Customers expect us to put emergency measures in place and provide alternative supplies of water if their supplies are disrupted.
	Water network resilience	Customers expect us to continually improve and upgrade the network to ensure it is resilient in the long-term, particularly to future challenges such as population growth and climate change. Customers and stakeholders expect us to invest in the system now and to take a 'replacement over repair' approach, particularly in relation to distribution pipes and trunk mains to reduce basement flooding, despite some highlighting the narrow benefits and high costs.
WS1. I want you to prevent sewer flooding and take waste away safely	Wastewater network resilience	Customers expect to be able to rely on the wastewater system functioning 24/7. They expect us to maintain and improve it to ensure its reliability today, as well as in the face of future challenges such as increasing demand from population growth and climate change. Customers expect us to invest in wastewater infrastructure and implement solutions which will address future challenges.
	Sewer flooding	Sewer flooding, particularly into/near homes and properties, is amongst the highest of customer priorities to address. Given the severe impact incidents of sewer flooding have on affected households, there is an expectation for us to take action to end this as soon as possible and protect all customers from experiencing this issue.
	Blockages	Customer awareness of the role of their behaviours can have on causing blockages has increased with time, however, customers generally expect continued engagement and information from us relating to what waste and materials they should not dispose of down toilets and drains.

Source: TMS04 What Customers, Communities and Stakeholders Want, v18.3, Sia Partners, September 2023

Figure 3.4: Detailed expectations on 'for Communities' from WCCSW

Our customers' expectations (3/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For Communities

Wants	Topics	Summary of customers' expectations
CI1. I want you to have a positive impact on the community	Corporate Social Responsibility and local impact	Customers expect us to 'give back' to and reinvest in the communities who we serve; this could range from charitable donations to local causes, to training and employment opportunities for local people, and educational programmes and events. Customers also expect us to minimise the impacts of our operations on local communities, including the safety and security of our sites, behaviour of our employees, and disruption caused by roadworks. Customers expect advanced notice of works where possible and clear timescales for the completion of work.
	Transparency	Customers expect accountability and transparency from water companies, particularly around finances, shareholders and profits, as well as how their money is spent. Perceptions of our business are largely impacted by wider issues, such as pollution incidents, and customers expect us to act transparently and demonstrate our plans to address key issues.
	Biodiversity	Whilst not a priority for improvement for most, some customers expect us to provide more wild spaces in their local communities and access to more of our sites for recreation. Customers care about biodiversity and expect us to take action to preserve it.

Source: TMS04 What Customers, Communities and Stakeholders Want, v18.3, Sia Partners, September 2023

Figure 3.5: Detailed expectations on 'for the Environment' from WCCSW

Our customers' expectations (4/4)

There are 10 customer Wants and 20 Topics split across our 3 key themes

For the Environment

Wants	Topics	Summary of customers' expectations
WT3. I want you to fix leaks and ensure there is enough water in the future	Water resources	Customers expect us to secure water resources and plan to mitigate against future challenges, such as population growth and climate change. They expect us to explore and invest in a range of options to improve resilience of supply, including recycling and water transfers. Customers expect us to assess water source options by balancing efficacy of the solution with the cost and time to implement and impact on the environment.
	Water demand management	Customers expect us to implement a range of measures, both on the supply and demand-side, in order to reduce consumption and improve water efficiency. For example, customers generally accept they could reduce the amount of water they use, however, they expect us to provide them with the necessary information and tools i.e. smart meters and water saving devices to help them, as well as reducing the amount of water wasted through leakage.
	Sustainable abstraction	Customers and stakeholders expect us to reduce the impact of our operations on the environment, including relying on vulnerable rivers and streams, as well as groundwater as water sources. They expect us to take action to secure alternative water supply options, such as reservoirs and transfers.
	Leakage	Customers see reducing leakage as a top priority amongst core water service improvements and in improving the efficiency of the water supply system. When informed about the costs of fixing leaks, they expect us to determine an acceptable balance between reducing leakage, bill impacts and disruption.
WS2. I want you to stop polluting rivers and to improve their quality	River health	Awareness and concern relating to pollution and health of rivers has increased in recent years. Customers expect us to make efforts to reduce and eradicate incidences of storm overflows and pollution events, and clearly demonstrate our progress on achieving this. Customers also expect us to improve the quality of river water, both for the benefit of wildlife and habitats, as well as people who use them for recreational purposes.
WS3. I want you to reduce emissions and reach net zero	Net zero carbon	Customers place increasing importance on issues relating to climate change and emissions; they generally expect us to pursue options to reduce our operational emissions to achieve net zero as soon as possible, such as generating our own green energy and becoming self-sufficient. They expect us to achieve this without increasing their bills.

ENV1. I want you to reduce your impact and restore the environment cuts across the other three wants within 'For the Environment'

Source: TMS04 What Customers, Communities and Stakeholders Want, v18.3, Sia Partners, September 2023

3.6. We understand the relative priority customers place on different wants

In Figure 3.6, we provide the relative priority ranking of the 10 customer Wants. This has been developed by triangulating several sources where customers ranked priorities including PR24 foundation research, Ofwat collaborative research, Vision 2050 research and the first phase of qualitative acceptability & affordability testing.

Figure 3.6: Customer relative priority ranking of Wants from WCCSW

Source: TMS04 What Customers, Communities and Stakeholders Want, v18.3, Sia Partners, September 2023

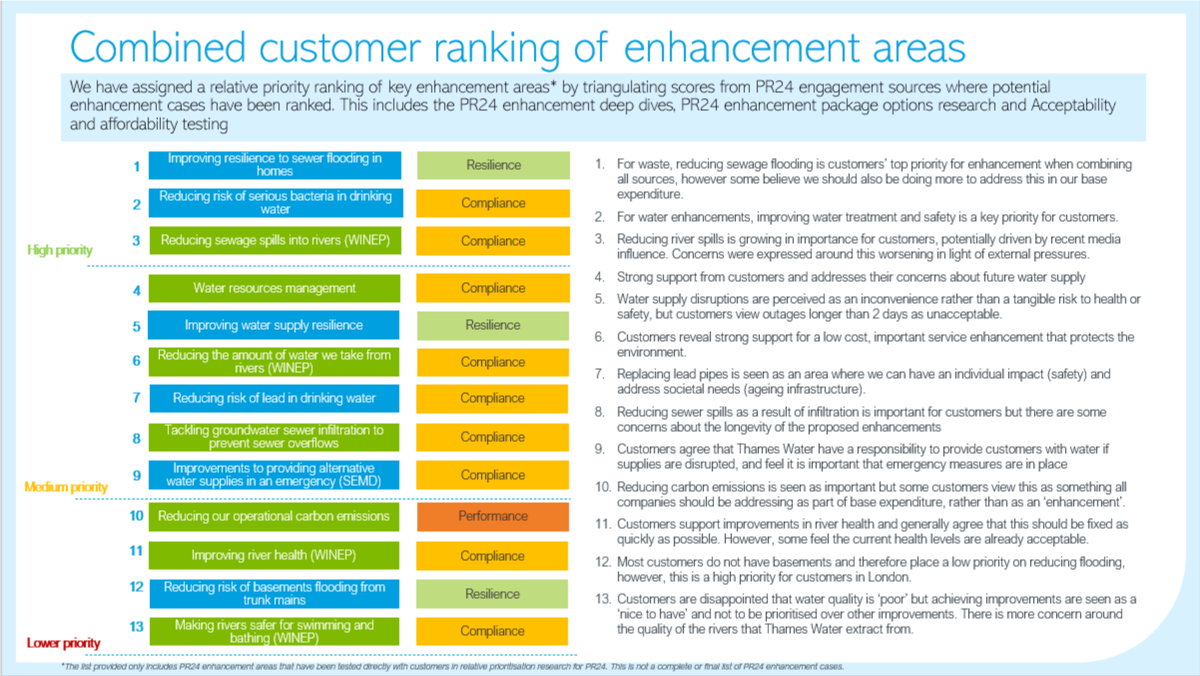
The 10 outcomes we aim to deliver in AMP8 have been developed based on what our customers, communities and stakeholders want. While all of these are important for customers, our analysis has indicated that customers place the highest importance on us providing safe and clean water and having fair and affordable bills.

3.7. We understand the relative priority customers place on different enhancement areas

In addition to our triangulation of customer Wants, we have also assessed where customers expect us to focus our efforts in improving performance through testing our potential PR24 Enhancement Cases.

In Figure 3.7, we provide the relative priority ranking of our PR24 Enhancement Cases. We have assigned a relative priority ranking by triangulating scores from PR24 engagement sources where potential Enhancement Cases have been ranked. This includes the Phase 1 and 2 PR24 enhancement deep dives, PR24 enhancement package options research and Acceptability & affordability testing.

Figure 3.7: Customer relative priority ranking of Enhancement Cases from WCCSW



Source: TMS04 What Customers, Communities and Stakeholders Want, v18.3, Sia Partners, September 2023

Enhancement expenditure is required where there is a permanent increase or step change in the current level of service to a new 'base' level and/or the provision to new customers of the current service level. Enhancement funding can be for improvements required to meet new statutory obligations, improving service quality and resilience, and providing new solutions for water provision in drought conditions.

Given the scale of potential enhancement investment, we needed to prioritise certain areas and make trade-offs in others. Our customer research plays a key role in this prioritisation process.

3.8. Customer insights have informed our PR24 plan at different levels

We have made use of a wide range of inputs, that go beyond solely engagement insights. We have used 320 insight sources, including PR24-specific research, research from PR19, ongoing insight gathering and insight from relevant external sources. These insights have had different objectives and have informed our planning in different ways. Please see Figure 2.2, our framework for PR24 customer engagement.

Table 3.2: How insights have informed our plan

Insight area	Impact on our business plan
1. Long term delivery strategy	Our Vision 2050 research has confirmed customer support for our long-term goals (scale and pace) and set the foundation for development of our Long-Term Delivery Strategy, with our AMP8 plan being the first step. There is a clear Line of Sight from our research to our long-term ambition and our Long-Term Delivery Strategy research provided customer views on example options for the mix and sequencing of key investments and outcomes to 2050.

2. AMP8 strategies	We have framed our PR24 plan around the 10 Outcomes (organised under the three themes of customers, communities and the environment) that have been directly informed by the triangulated view of What Customers, Communities and Stakeholders Want. The insight underpinning each Want and Outcome has been used by the Water, Wastewater, Customer (including vulnerability and affordability) teams to develop their strategies and objectives for AMP8.
3. Enhancement Cases	We have established a view of customer preferences across our potential Enhancement Cases, both statutory (compliance) and discretionary (resilience and performance). These views have been used in our wider plan prioritisation framework to determine where we focus our efforts in AMP8. We have also used the detailed insights from our Enhancement Case research to develop individual business cases (i.e. using insights to ensure our proposed solutions align with what customers want and which are the best option for customers).
4. Performance Commitments	Ofwat's central research has been used to inform each water company's ODI rates. This means our customer preferences are currently being included in our models which will determine where we focus our efforts and investment across our regulatory Performance Commitments in AMP8.
5. Acceptability and Affordability	We have undertaken qualitative acceptability and affordability testing of different options our draft plan with customers, including key Performance Commitments and Enhancement Cases. The feedback gathered has been used to update our triangulation of insights and refine our final plan proposals ahead of quantitative testing. Our quantitative acceptability and affordability testing provided us with an understanding of customer acceptance and affordability of our final plan ahead of final submission to Ofwat. Our Long-Term Delivery Strategy research provided customers' views on theoretical options for phasing investment and bill impacts over the longer-term and views on the fairness and affordability of an indicative example bill profile for our proposals to 2050.

3.9. We demonstrate Line of Sight from customer views to our proposals across our PR24 plan

Table 3.3: Where we demonstrate Line of Sight in our plan documentation

Document	Purpose	How we demonstrate Line of Sight	Where to find this
Strategic narrative (Engagement and Line of Sight sections)	Summary of our approach to engagement and what our customers told us	• Summary of What Customers, Communities and Stakeholders Want and framing our plan around 10 Wants • High level overview of engagement undertaken	TMS01 PR24 Business Plan
Customer Engagement, including overall Line of Sight (this document)	Detailed approach to engagement and how it meets Ofwat's standards Explains how the insight we have gained from engagement is reflected in our Plan.	• Explanation and justification of our approach to engaging with customers, communities and stakeholders • Demonstration that our engagement approach meets Ofwat's standards for research, challenge and assurance • Explanation of our triangulation and Line of Sight process with reference to all areas where Line of Sight is demonstrated across the plan • Summary of the overarching Line of Sight from what we heard to how we are responding in our PR24 plan • Explanation of the key choices we have made using insights including tensions and trade-offs • Explanation of how we refined our plan using findings from qualitative Affordability and Acceptability testing • 'You said, we did' response to Your Water, Your Say sessions	TMS03 Customer Engagement – Section 2: How we engage customers and Section 3: Line of sight from what customers want from our PR24 plan
What Customers, Communities and Stakeholders Want	Consolidated view of our understanding of customers' wants and priorities	• To ensure our plans and strategies deliver what customers, communities and stakeholders want, we periodically consolidate what we know about their needs and expectations in our What Customers, Communities and Stakeholders Want (WCCSW) document • It provides a consistent and robust evidence base for our decision making	TMS04 What Customers, Communities and Stakeholders Want v18.3
Long term delivery strategy	To present in detail our LTDS and the evidence	• Overview of how LTDS was developed and tested with customers	TMS06 Our Long Term Delivery Strategy

	underpinning it, including the Line of Sight with what our customers and stakeholders told us.	• Summary of key insights for each key investment area and how the insight informed our LTDS • Demonstration of how proposals in LTDS are fair and affordable to current and future customers – including evidence that customers consider the forecast bill impacts of the LTDS to be acceptable	
Outcome strategies - Water, Wastewater, Customer, Developer Services	Outcome-focused account and justification of plans for water, wastewater and customer including the Line of Sight with what our customers and stakeholders told us.	• Summaries linking Wants to objectives/commitments and Outcomes • Summary of why are we proposing our overall package for AMP8 with clear reference to how customer insights informed decisions and key trade-offs made • For Water and Wastewater Outcome Delivery strategies we also provide a summary of the findings from key engagement sources for each outcome (Ofwat / CCW research, Enhancement Case research and AAT)	TMS08 Our AMP8 Water Outcomes Delivery Strategy TMS09 Our AMP8 Wastewater Outcomes Delivery Strategy TMS11 Our Customer Strategy TMS12 Developer Services
Bill impact, Affordability and Vulnerability	To explain and justify our proposed bill impact, and our proposed measures to support vulnerable customers.	• Summary of acceptability and affordability testing results (Evidence that customers support the proposed rates and resulting bill profile, including LTDS) • Evidence of customer research relating to our proposals for social tariffs and rising block tariffs • Summary of vulnerable customer wants and how the plan delivers on these	TMS07 Bill Impact, Affordability and Vulnerability
Enhancement Cases	To explain, justify and provide evidence in support of our proposed Enhancement Cases.	• Summary of targeted engagement undertaken to justify the specific Enhancement Case • Evidence of customers support for the need for investment and proposed solutions, where appropriate	TMS21 Enhancement case: Reducing the risk of basement flooding TMS22 Enhancement case: Long-term water quality strategy: Lead TMS23 Enhancement case: Long-term water quality strategy: Cryptosporidium

			TMS24 Enhancement Case: Sewage Treatment Growth TMS25 Enhancement case: Digital cyber security TMS26 Enhancement case: WINEP TMS27 Enhancement case: WRMP supply TMS28 Enhancement case: WRMP demand TMS29 Enhancement case: IED
Bespoke Performance Commitments	To explain, justify and provide evidence in support of our proposed bespoke Performance Commitments.	• Summary of customer views on Street works Collaboration to support our bespoke Performance Commitment in this area	TMS34 Bespoke PC: Collaboration in London

3.10. There is a clear overarching Line of Sight from what we heard from customers to how we are responding in our PR24 plan

Our plan delivers improvements across our 10 Outcomes, emphasising the things that matter most for our customers. In determining our proposals for the PR24 plan, we have considered customer views alongside other factors such as our legal obligations, affordability and deliverability in the context of our current performance. We have made choices that aim to ensure we have balanced and phased our delivery to meet our long-term objectives for customers, communities and the environment.

In the following tables (Tables 3.4 to 3.12), we demonstrate the overarching Line of Sight for our PR24 business plan, including a summarised view of what we heard, how we are responding and what we will achieve by the end of AMP8. The insights summaries in this table are underpinned by more detail in our What Customers, Communities and Stakeholder Want document.

We also provide a more detailed line of sight from insights to proposals in several documents across our plan as documented in Table 3.3. While our plan delivers the things customers want, in some areas we have had to make difficult choices and trade-offs due to wider constraints, these are documented in Table 3.13.

For customers – Line of Sight summary

Table 3.4 I want an easy customer experience and tailored support

Topic	What we heard	How we are responding	What we will achieve by the end of AMP8	Relative priority ranking
Customer experience	Customers want us to be easy to contact and have their issues and queries handled effectively by knowledgeable staff. Where resolution is not possible upon first contact, customers expect proactive communication and updates on progress and timescales.	We're speeding up resolution of issues and keeping customers updated to improve our C-MeX score in-line with the industry average and reduce complaints. We'll reduce the number of customer issues occurring in the first place. We'll resolve more billing and operational issues within 24 hours. We'll proactively keep customers updated so they will only need to contact us once to get their issue fixed	An improvement in our C-MeX rank from 17th to 15th	Low Our activities in this areas are important to customers but lower priority relative to other core areas of our water and

Topic	What we heard	How we are responding	What we will achieve by the end of AMP8	Relative priority ranking
Vulnerable customer support	Our customers in vulnerable circumstances, and their representatives, want us to ensure there are additional services and propositions in place tailored to their specific needs. This includes providing a range of accessible channels of communication and raising awareness of services available.	We will continue to provide inclusive, tailored support to our vulnerable customers. We're expanding our Priority Services Register (PSR) through data sharing to make sure all eligible customers are offered it and we will increase the number of inclusive service propositions.	An extension in the reach of our PSR to 75% of our eligible population	wastewater service.
Developer services	Developers want more proactive communications and updates from us and provision of a single point of contact to deal with their queries. They want to see improvements in response times and simplification of quotation and application processes.	We will improve our D-MeX score and position. We'll make it simple and efficient for our developer customers to deal with us. We'll further develop the connections market so it gives effective choice for developers and makes it easy for NAVs and Self Lay Providers to compete.	An improvement in our D-MeX rank from 16th to 13th	
Business / non-household customers	Business customers are particularly concerned about supply interruptions, due to the potential impact on their operations. They therefore expect proactive contact, apologies and higher levels of compensation as a result of service failures.	(See also 'Customer experience' above) We will improve our service for business customers and non-household retailers through stretching BR-MeX targets.	An improvement in our BR-MeX rank from 13th to 11th	
Retail customers	Retail customers are generally happy with the account management and support they receive, however, they want us to prioritise improved communication during incidents and speed of service.			

Table 3.5 I want fair and affordable bills

<table>
<tr><th>Topic</th><th>What we heard</th><th>How we are responding</th><th>What we will achieve by the end of AMP8</th><th>Relative priority ranking</th></tr>
<tr><td>Billing</td><td>Customers feel the bills we send them are transparent and easy to understand. They expect us to ensure that these bills are accessible to all customer types. Non-household customers in particular support the role of metering in providing more accurate bills.</td><td>The key measures we are delivering against in our response to these customer wants are Cash Collections and Bad Debt. We're also putting customers in control of their bills and helping them to better manage their water use through installing smart meters.</td><td rowspan="3">An improvement in Current Year collection rates from 85% to 94%, despite the pressures of the cost-of-living crisis

A reduction in bad debt assuming the cost-of-living crisis declines as anticipated. For exact figures please see TMS11 Our Customer Strategy

We aim to help the vast majority of the eligible population through social tariffs and reduce bad debt</td><td rowspan="3">High

Affordability is ranked consistently as a high priority for our customers across our research.</td></tr>
<tr><td>Affordability</td><td>The service provided and price we charge drive perceptions of value for money. An increasing number of customers are struggling to pay their bills – those who receive financial support from us are appreciative, but would like us to be more proactive in contacting them and promoting the support available.</td><td>We'll make it easy for customers to see that our services are value for money and offer new value-add services and incentives to support customers. We will continue to fund debt advice and offer our payment matching programme. We will partner with others to raise awareness of the affordability support available and increase the number of customers on an active payment plan.</td></tr>
<tr><td>Social tariffs</td><td>Customers think we should provide extra support to those struggling to pay, and generally support paying an additional cost on top of their bills to go towards funding this.</td><td>We will explore innovative tariffs which will allow us to support more customers.</td></tr>
</table>

Table 3.6 I want safe, high quality drinking water

Topic	What we heard	How we are responding	What we will achieve by the end of AMP8	Relative priority ranking
Water quality and safety	Customers want a dependable service from us across all core water service areas, including ensuring safe and high-quality drinking water. This is consistently ranked amongst customers' highest priorities.	Our 'Public Health Transformation Plan' is an integrated improvement plan which, through changes to operational practices and key investment, addresses the key issues that pose a risk to water quality.	An improvement in our score against the Compliance Risk Index from a score of 1.75 to 1.00 Continuation of our currently strong performance in Customer Contacts About Water Quality (at 0.45 contacts per 1,000 population)	High Providing a safe, high quality drinking water is a high priority in our customer research. This is consistent with findings from Ofwat/CCW collaborative research.
Taste, smell and appearance	Whilst water quality is of high importance to customers, they only place a modest value on improving the taste, smell or colour of water.	Although our performance on water quality is industry leading, we will invest to improve the effectiveness of our disinfection process and deal with discolouration risks on our water network.		
Water treatment	Customers are alarmed at the possibility of water becoming contaminated by harmful bacteria. When we tested potential water enhancements, improving water treatment and safety was a key priority for customers. Customers see the solution in this area (improving processes and technology at water treatments plants) as relatively straightforward and as a potential 'quick win'.	Our 'Public Health Transformation Plan' addresses the key risks. In London we are proposing an Enhancement Case to mitigate the risk of increasing levels of cryptosporidium being detected in the raw water.		
Lead pipes	Knowledge of lead pipes is low among customers. However, upon learning about the health consequences and prevalence of lead pipes, many customers are surprised this is not in the wider public consciousness, and want to know what water companies are doing to protect customers. Thames Water's long-term goal of replacing all lead pipes is what customers believe is wholly necessary.	We are proposing an Enhancement Case which will replace 54,000 lead communication pipes. We are also proposing a trial to support customers to replace their own lead supply pipes and internal plumbing.		

Table 3.7 I want a reliable supply with minimal disruption

<table>
<tr><th>Topic</th><th>What we heard</th><th>How we are responding</th><th>What we will achieve by the end of AMP8</th><th>Relative priority ranking</th></tr>
<tr><td>Supply interruptions</td><td>Customers place a high priority on being able to rely on water being available 24/7. They expect us to proactively monitor, maintain and improve the network to ensure its reliability, now and in the face of future challenges. Customers find supply outages of more than 48 hours unacceptable.</td><td>We will reduce the number and length of supply interruptions our customers suffer by:
• Improving the monitoring of our network and deploying dedicated rapid response teams allowing a faster response.
• Enhancing our tanker fleet to allow direct infusion of supplies into the network.
• Introduction of calm networks reducing pressure transients and reducing the risk of bursts.
• Changing our culture so that “every second counts”.</td><td>A reduction in Water supply interruptions from an average of 10 minutes and 30 seconds to 9 minutes 0 seconds lost per property for interruptions that lasted three hours or more

A reduction in unplanned outages from 2.34% to 1.30% of peak week production capacity</td><td rowspan="2">High

Reducing water supply interruptions is a high priority across most sources, trending lower in the qualitative acceptability testing research.

Asset health related outcomes such as mains repairs tend be a medium relative priority.</td></tr>
<tr><td>Trunk mains replacement</td><td>Although customers place a lower priority on addressing this, given the common perception that this is of narrow benefit, customers accept that we have an obligation to protect all customers. They also recognise the longer-term benefits of proactively replacing assets and pipework at risk of failure.</td><td>We will deliver our trunk mains replacement enhancement programme to reduce the risk of basement flooding, starting those which pose the biggest risk to properties, as we recognise that public safety is a “given” for our customers.</td><td>A reduction in Mains Repair from 281.3 to 237.7 repairs per 1000km</td></tr>
</table>

Table 3.8 I want you to prevent sewer flooding and take waste away safely

Topic	What we heard	How we are responding	What we will achieve by the end of AMP8	Relative priority ranking
Wastewater network resilience	Customers want Thames Water to maintain and upgrade assets effectively and to increase the capacity of the wastewater network to ensure its reliability, now and in the face of future challenges.	We will repair, reline or replace old and damaged sewers; add monitors/alarms to our sewers so we get early warning of blockages and potential flooding incidents; and continue to clean our sewers and educate our customers on what not to put down the drain to prevent blockages.	A reduction in internal sewer flooding incidents by 17% compared to our forecast performance at the end of AMP7 A reduction in external sewer flooding incidents by 14% compared to our forecast performance at the end of AMP7 Continuation of our industry leading performance on sewer collapses	High Reducing sewer flooding is a high priority across our research. This is consistent with findings from Ofwat/CCW collaborative research.
Internal sewer flooding	Despite a very small minority of customers experiencing sewer flooding into property, customers recognise the significant distress it can cause and therefore prioritise improvements to significantly reduce it.			
External sewer flooding	Ineffective sewerage management can result in negative perceptions of Thames Water and its efforts to maintain the network. Customers welcomed more information on what they can do to reduce blockages which result in sewer flooding events.			

For communities – Line of Sight summary

Table 3.9 I want you to have a positive impact on the community

Topic	What we heard	How we are responding	What we will achieve by the end of AMP8	Relative priority ranking
Investing in local communities	Customers want Thames Water to reinvest into the communities it operates in and welcome jobs and apprenticeships for local people, involvement in local issues, community investment programmes and access to sites for recreation.	Our AMP8 plan is supported by five pillars: • A diverse, inclusive workforce that represents the customers we serve • Investing in local communities • Minimising our impact (including our bespoke Performance Commitment on Collaborative Streetworks) • Protecting and enhancing biodiversity (including our Performance Commitment on Biodiversity) • Providing access to our sites for recreation. These pillars and Performance Commitment guide work that will help us to invest in and build partnerships with local communities, and reduce the impact of disruptive aspects of our work on them.	A diverse, inclusive, local workforce that represents the customers we serve Reinvest into the communities we operate in A reduction in the disruption our activities can cause to our customers and communities Greater site access and investment in biodiversity	Low While still important to customers, this is generally the lowest relative priority for customers who prioritise core services first.
Building partnerships	There is a desire to see us focussing on partnership working and building strategic relationships with relevant organisations to deliver on a range of project/schemes.			
Reducing impact of our operations on local communities	Where we have a presence in local communities, customers expect us to minimise the impact of our sites and operations, including roadworks, through effective maintenance, collaboration with other utilities and proactive communication relating to works.			

For the Environment – Line of Sight summary

Table 3.10 I want you to fix leaks and ensure there is enough water now and in the future

<table>
<tr><th>Topic</th><th>What we heard</th><th>How we are responding</th><th>What we will achieve by the end of AMP</th><th>Relative priority ranking</th></tr>
<tr><td>Water resources</td><td>Customers expect us to mitigate impacts from pressures such as a growing population and climate change to ensure that they continue to receive a reliable supply of water now, and in the future.</td><td>We will invest in new sources of water and build the necessary infrastructure to ensure we increase our resilience to drought e.g. Teddington Direct River Abstraction scheme, Severn Thames transfer, and South East Strategic Reservoir Option.</td><td rowspan="4">A reduction in per capita consumption of 5.5%

A reduction in business water demand of 10.1%

A reduction in leakage of 37.1% (from 2020 baseline).</td><td rowspan="4">Medium to High

Activities related to securing future water supplies is generally a medium relative priority area.

The exception is leakage reduction which is a higher priority for our customers compared with other activities in this area.</td></tr>
<tr><td>Demand management</td><td>Customers are generally positive about the idea of reducing their consumption ahead of developing new resources, but also want to see us also doing our bit (e.g. reducing leaks). They are accepting of the role of smart meters in helping to achieve this.</td><td>We will continue our rollout of smart meters and increase total penetration to 75% of our household customer base by the end of AMP8. We will also implement our targeted water efficiency campaign, including smarter home and business visits, as well as targeted customer engagement via email.</td></tr>
<tr><td>Sustainable abstraction</td><td>Customers believe that improved water supply resilience should not come at the expense of the environment. They support limiting the amount of water taken from groundwater and rivers/streams, particularly those considered vulnerable e.g. chalk streams.</td><td>We will reduce abstraction during AMP8, creating investment in new trunk mains to bring in water from other parts of the network.</td></tr>
<tr><td>Leakage</td><td>Customers feel that the current level of leakage is too high and place a high priority on reducing it. They see it as a waste of a valuable resource and results in negative perceptions towards us. They support the use of smart meters to help achieve this.</td><td>We will continue to find and fix leaks and use smart meters to locate them. We will deploy new technology and digitise our network to identify leaks quicker. We will deliver long term sustainable leakage reduction through an increasing mains replacement programme, pressure management and delivering “calm” networks.</td></tr>
</table>

Table 3.11 I want you to stop polluting rivers and to improve their quality

Topic	What we heard	How we are responding	What we will achieve by the end of AMP	Relative priority
Pollution incidents	Customers have a low tolerance for pollution of rivers with untreated sewage and want to see significant efforts made to reduce both the frequency and severity of pollution events – they support Thames Water's commitments to reduce, and ultimately eliminate, river pollution by 2050.	We will repair, reline and replace old and damaged sewers, and provide more storage on our sewer network. We will also add monitors/alarms to our sewers so we get early warning of potential pollution incidents, and continue to clean sewers and educate customers to help reduce blockages.	A reduction in total pollution incidents from 53.2 to 37.0 incidents a year per 10,000km of sewer – a 30% reduction A reduction in serious pollution incidents from 8 to 4 a year – a 50% reduction A reduction in storm overflows from 23.8 to 17.2 spills per storm overflow – a 28% reduction 100% compliance with our discharge permits	Medium Reducing pollutions and improving river quality tends to be a medium relative priority for our customers in our research. This is consistent with findings from Ofwat/CCW collaborative research.
Improving river quality	Customers and stakeholders want Thames Water to protect and improve the quality of rivers and the environment and want to see clean, well flowing rivers. Customers want Thames Water to ensure healthy rivers that support a wide variety of activities including wildlife, fishing and recreation including swimming.	On top of reducing spills into rivers, we will work to remove more phosphorous from treated water entering rivers, and undertake activities relating to chemical investigations, invasive species, eels and fish passage, bathing water, biodiversity, habitat, flow monitoring, river monitoring, nutrient neutrality.		

Table 3.12 I want you to reduce emissions and reach net zero

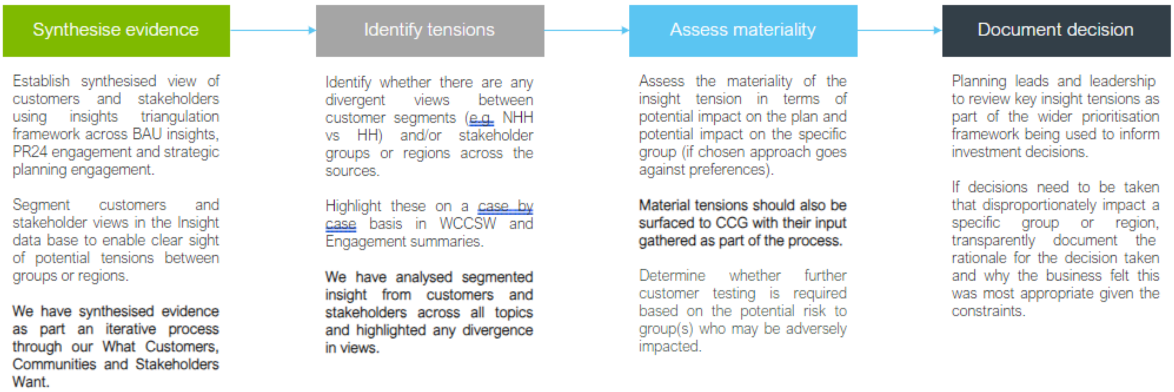
Topic	What we heard	How we are responding	What we will achieve by the end of AMP	Relative priority ranking
Renewable energy	Customers place increasing importance on issues relating to climate change and emissions; they generally expect us to pursue options to reduce our operational emissions to achieve net zero as soon as possible, such as generating our own green energy and becoming self-sufficient.	Our work towards the customer wants in this area during AMP8 will be supported by two Performance Commitments: Operational Greenhouse Gases (Water) and Operational Greenhouse Gases (Wastewater).	Reduce annual operational greenhouse gas emissions by circa 35 ktCO2e (from the 2021/22 baseline). Reduce annual emissions by a further 14 ktCO2e (from the 2021/22 baseline) if our Net Zero bid is successful	Low This area tends to be a medium to low relative priority, with customers expecting us to prioritise improvements in core service first.
Reducing emissions	Whilst reducing carbon emissions is seen as important, some customers view this as something all companies should be addressing as part of base expenditure without increasing bills.			

3.11. We have used customer insights to inform our decisions, and in certain areas we have had to make tough choices and trade-offs

A key part of our triangulation and Line of Sight framework is ensuring we have a robust evidence base to make decisions, including identifying conflicting evidence and dealing with it in a transparent and systematic way. In its guidance for best practice triangulation for PR24, CCW encourages companies to help Ofwat and CCGs by highlighting where trade-offs exist, where disagreement lies, and why certain solutions were chosen over others.

We have used the following approach to make key choices and deal with insights tensions as part of our triangulation and Line of Sight framework.

Figure 3.8: Our approach to making choices and dealing with insights tensions



Source: PR24 Insight triangulation and Line of Sight methodology, Sia Partners, August 2023 (see Section 8)

Table 3.13: Summary of key choices and trade-offs made across our plan

Theme / Want	Plan area	Key insights	Key choices and trade-offs made
For customers I want fair and affordable bills	Affordability and bill increases	• Customers have expressed a preference for bills to remain as low as possible, and for any increases to be kept small so that they are more manageable • Customers have also consistently told us that financial support should be made available to those who are struggling to pay	• Despite customer preference for smaller bill increases with a 'smoothed transition' approach, **we are proposing an initial increase, followed by a 'plateau' profile** • This will **reduce the number of customers below the Affordability Threshold**, allowing our affordability support to be optimised and aimed at these customers. This approach also **tackles the issue of price rises early rather** than deferring it to the end of the AMP • This decision represents a key trade-off which we have made in order to best meet the needs of our customers through **reducing longer-term bill impacts and ensuring more customers who**

			are struggling to pay can receive financial support
For customers I want safe, high quality drinking water	Water treatment - reducing the risk of harmful bacteria in water supplies	• For water enhancements, safety is a key priority for customers • Hearing that there is a risk of water becoming contaminated by harmful bacteria is alarming to many customers. The solution is also seen as relatively straight forward • Customers feel this could be a 'quick win' for Thames as it was perceived to be a simple solution to a safety issue	• The proposed investment of UV technology at 2 of our 4 large, slow sand filter sites, is a key element of our long-term water quality strategy. Customers view that addressing any risks that may pose a risk to water quality as "quick wins", however, delivering UV technology on some of the largest treatment facilities in the UK and Europe will take time • We have considered all other investment needed across our 4 slow sand filter sites and believe a stretching, but credible delivery plan can address the risk at Coppermills WTW and Hampton WTW. We have chosen to prioritise investment at Coppermills and Hampton as both of these sites directly feed large populations, whereas Ashford Common and Kempton discharge the majority of their treated water into the ring main allowing both sites to be supported by the wider network • During AMP8 we will undertake the design work at the remaining two sites to allow delivery in the period 2030-2035
For customers I want a reliable supply with minimal disruption	Trunk mains replacement	• Most customers do not have basements and therefore place a low priority on reducing flooding, however, this is a high priority for customers in London • Customers without basements (largely those living outside of London) view replacing trunk mains as a London-centric issue, which will benefit customers who are generally perceived to be wealthier, hence it is generally ranked as a lower priority compared to other areas	• We are **proposing to deliver our trunk mains replacement Enhancement Case** despite the relatively low support from customers outside of London • We consider this an absolute legal obligation under Section 3 of the Health & Safety at Work Act 1974 and have prioritised delivery to mitigate potential risk to customers living in basement properties

For customers I want a reliable supply with minimal disruption	Water supply resilience	• Water supply disruptions are perceived as an inconvenience rather than a tangible risk to health or safety, but customers view outages longer than 2 days as unacceptable • When shown our potential future plans to improve water supply resilience, almost all customers support Thames Water's potential future approach to major water supply interruptions as they feel Thames Water would be proactive in mitigating the threat and also that the work is inevitable, and costs would only further increase if left unaddressed • Future customers have a higher preference for investment in this area which they see as tackling the resilience issue as soon as possible, as they are aware they will otherwise inherit these issues	• Despite it being a high priority for customers, we are proposing to defer any further water supply resilience investment into AMP9. We will use AMP8 to complete the delivery of the current water supply resilience programme (WSSRP) currently being considered by Ofwat • We will still undertake targeted interventions over AMP8 to balance risk and performance, however, the deferral of investment will mean higher bill impact for future customers • This trade-off is required in order to ensure we can both deliver and enhance our wider programme and especially those programmes with statutory drivers. We will still undertake targeted interventions over AMP8 to balance risk and performance
For customers I want you to prevent sewer flooding and take waste away safely	Sewer flooding	• For our wastewater plans, reducing sewage flooding is customers' top priority for enhancement investment when combining findings across all engagement sources, however some believe we should also be doing more to address this in our base expenditure. The vast majority of customers support our ambition to prevent sewer flooding by 2050, with the majority of customers wanting this to happen sooner. This is also a high priority area for non-household customers, who place a greater emphasis on enhancement areas that can reduce the risk of potential financial impact on their business • Some of our key stakeholders, such as Environmental NGOs,	• We could potentially have delivered greater investment at a faster pace to reduce sewer flooding and align with the ambitions within our Drainage and Wastewater Management Plans. However, we have scaled back investment in this area during AMP8, due to deliverability and financeability constraints • Sewer flooding is part of a much wider investment programme and although we are increasing our overall spend by over 50% compared to AMP7, a number of trade-offs have been made • Our focus has been on developing a programme that balances regulatory/legal requirements with performance and resilience improvements as per customer feedback. On this basis our flooding programme has been scaled back to that

		look at the overall risk picture, and suggest we should balance flooding protection against the risk of wider impact on the environment such as river pollution • Customers showed a clear preference for an even paced delivery profile for the Drainage and Wastewater Management Plan (an even level of increased investment over 25 years). On the contrary, stakeholders were concerned about the pace of delivery, and that the outcomes would not be achieved until late in the DWMP planning period, and earlier delivery of the solutions would be preferred	which can be delivered through our base totex allowance
For the Environment I want you to fix leaks and ensure there is enough water now and in the future	Leakage	• Customers feel that current levels of leakage are too high and see reducing leakage as a top priority amongst core water service improvements • They feel asking customers to cut back on their use seems unfair given high levels of leakage – they expect us to be doing more in this area • While they feel our 2030 target is positive, challenging and realistic, the majority still want to see a more ambitious target	• We know our leakage levels are high when compared with other companies. Leakage reduction is a lower relative priority from Ofwat's central research compared with our own customer research. Despite our relatively poor performance, we are still within our reduction targets, but we know our customers would like us to do more • Meeting our customer's expectations with leakage is difficult. By 2030 we will have delivered a large proportion of the technology and solutions that are the quickest to deploy such as calm networks, metering and pressure management. In order to deliver the scale of reductions customers expect this will require an extensive infrastructure renewals programme replacing a large proportion of our 36,500km of distribution mains. This could have a significant impact on bills and will take time to deliver • Our plan therefore delivers the most cost-effective solutions earlier, with the target that innovation will help identify a cost-effective method for

			refurbishing water mains in the next 10 years
For the Environment I want you to stop polluting rivers and to improve their quality	Water Industry National Environment Programme (WINEP) (Wastewater)	Customers have higher support for certain aspects of our WINEP programme: • Reducing sewage spills: Reducing river spills is a high priority for customers, potentially driven by recent media influence. Concerns were expressed around this worsening in light of external pressures • Improving river health: Customers support improvements in river health and generally agree that this should be fixed as quickly as possible. However, some feel the current health levels are already acceptable and hence it is a relatively lower priority for customers. Stakeholders from Local Government and community groups, however, want Thames Water to go further and 'remove' rather than 'reduce' the strain on rivers • Making rivers safer for swimming and bathing: Customers are disappointed that water quality is 'poor' but achieving improvements are seen as a 'nice to have' and not to be prioritised over other improvements	• Due to deliverability and financeability constraints we have looked to phase aspects of our potential AMP8 WINEP beyond AMP8 • In doing so, we have taken account of customer feedback and ensured we retain investment in pollution reduction, reducing spills and ensuring safe bathing waters • Other aspects such as nutrient reduction and river restoration projects have been phased into AMP9 and AMP10

Please refer to TMS04 (What Customers Communities and Stakeholders Want v18.3) for discussion of key insight tensions, as well as the individual Enhancement Case documents and relevant technical appendices for further information and rationale for decisions.

3.12. We invited challenge and assurance on our Triangulation and Line of Sight

We have sought independent challenge and assurance of our triangulation and Line of Sight process, both through our CCG and independent assurance experts. We have engaged regularly with our CCG as we have developed our plan and presented several iterations of Line of Sight from our customer research to emerging proposals. We have also commissioned independent expert assurance by Savanta, which includes a review of the triangulation of research findings and how we have considered customers' views in our decision making.

We detail how our CCG has challenged our engagement and its application in Section 5. Similarly, we explain how our Board has overseen our customer engagement and provided assurance on its quality and use in Section 6.

We provide a summary of key CCG challenges on triangulation and Line of Sight and how we responded in Table 3.14. We provide a summary of key recommendations from Savanta's assurance of triangulation and Line of Sight, how we responded and Savanta's subsequent feedback in Table 3.15.

Table 3.14: Examples of how we responded to CCG challenges on Line of Sight

CCG feedback	Thames Water's response
Triangulation of insights: Even if the processes are robust, how can CCG ensure the decisions taken produce the right outcomes for customers – is there adequate triangulation in the line of sight?	We have provided a final synthesis of customer views in our What Customers, Communities and Stakeholders Want report which serves as our triangulated customer research evidence base. We have carried out triangulation using all sources in line with CCW guidance on best practice to develop key insights. We have drawn upon these insights in various strategies and documents across our plan and demonstrate how we have responded to customers wants, alongside other factors. We have provided an overview of this approach and references to all the relevant documents in Section 3 (Line of Sight). In this document and the signposted line of sight content in other documents across the plan, we demonstrate how the plan has delivered the outcomes customers want and are transparent about any area where we may have had to make trade-offs and / or go against customer preferences.
Customer preferences: Are customer preferences nuanced enough. The delivery standard or the magnitude of improvement is not evident in the outcomes. E.g. in the case of cleaner rivers, how much cleaner do the rivers need to be to meet customer expectations? What is good enough in each of these areas is not clear.	Many of our individual research studies have explored the right level of service with customers. In response to the specific question raised in the CCG's report, we think the most illuminating report is the research on our 2050 Vision in which we explored customers' expectations in each of the key service areas (unconstrained by cost or deliverability).
Line of Sight narrative: CCG asked for the Business Plan to have a narrative about customer priorities woven throughout its text, rather than be restricted to an annexe or	In Table 3.3 we summarise the various documents where we demonstrate light of sight across the plan and what is covered within each.

the line of sight document. We await to see the Business Plan to see if this has been achieved.	For our final plan, we have included links to each document and the sections within each will be clearly signposted for ease.
Difficult choices: Compliance with new regulatory standards is so costly and additional equity so limited, the discretionary spend available to meet customer preferences is constrained. There are few hard choices to be made to reflect customer preferences; essentially, the hard choices are about balancing the need to achieve compliance, address asset health and deliver basic performance.	There are elements of existing obligations - including WINEP AMP7 - which have in practice proven more expensive to deliver than what was estimated at PR19. We are therefore seeking additional allowances from Ofwat to take into account the cost increase. The new obligations around Industrial Emission, Critical National Infrastructure and AMP8 WINEP sit alongside ongoing obligations under the Water Industry Act. We agree with the CCG that our plan needs to strike the right balance across the different drivers, recognising that the dimensions of compliance, resilience and performance are typically not mutually exclusive.
Further engagement required with the Line of Sight which maps how customer preferences are translated into investment decisions.	PR24 narrative shared with CCG on 11 August 2023 including examples of line of sight. We subsequently shared our near final customer engagement appendix (TMS03) with the CCG on 19 September 2023 which included the detailed line of sight for our entire PR24 business plan. This was followed by a session with the CCG on 22 September 2023 where we presented the line of sight and invited CCG questions and challenge ahead of final submission to Ofwat.

Table 3.15: How we addressed recommended assurance actions for triangulation and Line of Sight

Savanta's Phase recommendation	Thames Water's action	Savanta's Phase B and C review
Phase A: Making the Insight Triangulation key in WCCSW clearer	WCCSW was updated with a summary slide to clearly explain the insight triangulation key. Divergence of views between different groups was made clearer by citing all instances of this within the section on insight tensions.	Savanta's Phase B assessment found that the updated slide in WCCSW provides a clear and helpful summary of tensions in 'divergence of views' and 'regional differences'.
Phase B: Making the evidence of customer engagement across LOS sections in documents more explicit by using a standardised format to show the reader how the different elements of the business plan have been informed by customer engagement at a summary level.	We updated our core narrative document and TMS03 Customer Engagement to include standardised Line of Sight tables that aim to clearly demonstrate summaries of what we heard and how we responded across the 10 key outcome areas of our plan. We also updated the Line of Sight sections in each of our technical appendices, to ensure they were as consistent as possible (depending on the level of detail required for the specific area of the plan). We clearly signpost these documents in Table 3.3 of this document.	Savanta's Phase C assessment found that our Line of Sight approach has demonstrated that substantial evidence of customer views in each of the business case documents reviewed, and that there is sufficient evidence that in developing its PR24 business plan proposals to demonstrate that customer views and research have been core to decision making.

4. Testing our plan with customers and inviting challenge

Having spent 2022 building plan proposals in response to customers' views, in the first half of 2023 we invited challenge from our customers and their representatives on how well our draft PR24 plan reflected their preferences. In line with Ofwat's expectations we conducted acceptability and affordability testing customer research and a 'Your Water, Your Say' open challenge session. We also tested example options for the mix and sequencing of key investments, and the fairness and affordability of an example bill profile, to 2050. We used the feedback, alongside additional customer research and ongoing challenge from our Customer Challenge Group (CCG), to further improve our AMP8 and long-term plans. We re-tested our revised AMP8 plan in August-September 2023 before submitting it to Ofwat.

For evidence of how we complied with Ofwat guidance on acceptability & affordability testing and open challenge sessions please see our Acceptability and Affordability Testing qualitative and quantitative reports[56] and Your Water, Your Say feedback and approach reports[57] on the Thames Water website (links in footnotes). For evidence of how we have considered the feedback we received in our final submission please see Table 4.2 and Table 4.3.

4.1. We have followed Ofwat's guidance for testing customers' views of the acceptability and affordability of our proposals

To test customers' views of the acceptability and affordability of our business plans and long-term delivery strategy we implemented the approach set out in guidance from Ofwat and CCW. We recognise the importance of a standard approach to generate high-quality comparable survey data across the industry and so have not attempted to improve on or deviate from the standardised research approach. Evidence of our compliance with Ofwat's guidance can be found in our Acceptability and Affordability Testing reports, May and September 2023[56].

We undertook two rounds of testing: the first in April-May 2023 ahead of finalising our proposals, with a second round in August-September 2023 ahead of submitting our proposals to Ofwat. The first round included qualitative deliberative research to explore participants' views on the acceptability and affordability of our proposals, including their views on the phasing of outcome delivery over the longer term. The second round used a quantitative survey to provide a statistically robust measure of customers' views of the affordability of our proposals.

4.2. We gathered views on three plan options in our first round of testing

To give customers a meaningful choice in the first round of testing we contrasted a 'must do' plan with a 'proposed' plan and an 'alternative' option, which were terms defined by Ofwat. In Table 4.1 we summarise the definitions of the three plans we tested and their bill impact (the

[56] Acceptability and Affordability Testing qualitative report, May 2023: https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/acceptability-and-affordability-testing-qualitative-may-2023.pdf
Acceptability and Affordability Testing quantitative report, September 2023: https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/acceptability-and-affordability-testing-quantitative-september-2023.pdf
[57] Thames Water Your Water Your Say report, May 2023: https://www.thameswater.co.uk/media-library/home/about-us/regulation/your-water-your-say/your-water-your-say-meeting-report.pdf
Thames Water Your Water Your Say approach, August 2023: https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/your-water-your-say-approach-august-2023.pdf

table includes bill impacts for household customers, without the effects of inflation in 2022/23 prices, though in the research customers were shown personally tailored bills with and without inflation).

Table 4.1: Plan options presented to customers in first round of acceptability and affordability testing

Option	Features	Bill impact
Must do	The 'must do' plan was designed to allow us to carry out the work we are required to do to meet our legal and regulatory obligations, including the full WINEP programme in AMP8.	A bill of £515 by 2030 (up £98 or 24%, from average 2022/23 bill) and £565 by 2050 (up £148, 35%, from average 2022/23 bill) excluding inflation.
Proposed	The 'proposed' plan included investment to meet our statutory obligations (like the 'must do' plan) and additional discretionary improvements in asset health and resilience.	A higher cost to customers of £528 by 2030 (up £111, 27%, from average 2022/23 bill) and £696 by 2050 (up £279, 67%, from average 2022/23 bill) excluding inflation.
Alternative	We also presented customers with an 'alternative' option, in which some aspects of WINEP were phased into AMP9 but with the discretionary enhancements included for AMP8.	A similar cost to the 'must do' plan of £518 by 2030, (up £101, 24%, from average 2022/23 bill) and £697 by 2050 (up £280, 67%, from average 2022/23 bill) excluding inflation.

4.3. Most customers wanted us to maximise investment for the benefit of customers and the environment, but a sizeable minority said they would find bills difficult to afford

In the first round of acceptability testing we saw:

- A majority of customers chose the 'proposed' plan as their preferred plan, driven by support for service enhancements that address sewage pollution, river health and water supply resilience, and a desire for infrastructure investment that benefits future generations;
- Around three quarters considered the 'proposed' plan to be acceptable;
- Around half said the 'must do' plan was unacceptable because it is not good enough for future generations, it won't improve things enough, and we should do more out of profits; and
- A similar proportion said the 'alternative' plan was unacceptable because it won't improve things enough, it is not environmentally friendly enough (slower reduction of phosphorus) and it is poor value for money (lower bills are not sufficient to override concerns about river pollution/health).

On affordability we saw:

- The level of water bills did not appear to be a driving concern for most customers, largely because water bills seem low compared to energy bills or council tax;
- Broadly similar proportions of customers found each plan either easy or difficult to afford;

- Around a third of customers found the ‘proposed’ and ‘alternative’ plans difficult to afford – a particularly strong view from financially vulnerable customers – dropping to around a quarter for the ‘must do’ plan; and
- Customers wanted to be reassured that there are schemes in place to protect customers who are already struggling to pay their bills, as well as those who would likely struggle to afford future increases.

In Table 4.2, we summarise customer views on performance commitments and enhancements tested in the first round of acceptability and affordability testing, and how we used this feedback to shape our final plan.

Table 4.2: Summary of how we responded to customer views on performance commitments and enhancements in first round of acceptability and affordability testing

Area	Customer feedback from Qualitative Acceptability and Affordability testing (AAT) of our draft plan	How we responded in our final plan
Water Quality	Customers placed a medium importance on our ‘**Customer contacts about water quality**’ performance commitment; customers are split in their views on our performance here, heavily informed by their own personal experiences.	Kept our water quality related performance commitment targets in our final plan broadly consistent with what we tested in qualitative AAT.
Water supply interruptions	Customers place a medium priority on ‘**Reliable supply**’ as a performance commitment; our performance and targets are deemed acceptable, however, customers generally feel that outages longer than two days are unacceptable.	Amended our target to reflect the impact of large scale asset failures to ensure they are credible and also remain ambitious.
Trunk mains replacement	Customers were positive towards replacement of pipes to ‘**Reduce the risk of basements flooding from trunk mains**’ as an enhancement case, however, this is generally felt as a ‘London-focussed’ issue with narrow benefit. Despite the relatively low impact on their bills, many felt the money could be better spent elsewhere.	Proceeded with our Trunk mains enhancement programme. See Table 3.13 for rationale and trade-offs.
Water resources management	Customers place a high importance on our proposals for our ‘**Water resources management’** enhancement case, driven by fears over water security, population growth and the impacts of climate change. Customers are generally comfortable with the costs and feel this offers good value for money. Customers see smart meters as a critical pathway to customer usage control, however, customers’ experiences of efficiency devices has not always been positive. Customers feel a ‘mindshift’ is needed to reduce consumption i.e. communication, education, tips, etc.	Proceeded with our WRMP enhancement programme
Sustainable abstraction	Customers place a high importance on ‘**WINEP Water**’ as an enhancement case; customers recognise that ‘protecting the environment’ is a good thing and that chalk streams are rare. There is strong support from customers given the negligible bill impact and most were impressed by the	Proceeded with our WINEP (Water) enhancement programme

	committed targets for reduction from sensitive sources, however, some put less importance on protecting sensitive sources and questioned where the additional 80Ml/d would come from.	
Leakage	Customers placed high importance on '**Leakage**' as a performance commitment; they see leakage as wastage and perceive our performance in this area to be unacceptable. They want to see more ambition from us here to address this.	Increased our performance commitment target for leakage to deliver a 37.1% reduction by 2030 (from 2020 baseline).
Sewer flooding	Customers place a high importance on '**Sewer flooding**' as a performance commitment; internal sewer flooding is seen as the worst failure of service and our current performance is perceived to be unacceptable.	Kept our internal sewer flooding related performance commitment targets in our final plan broadly consistent with what we tested in qualitative AAT.
Pollution incidents and river quality	Customers place a high importance on '**Pollution incidents**' as a performance commitment; customers are subject to frequent negative media coverage on this issue. Our performance here is therefore perceived to be unacceptable by customers. Customers place high importance on '**WINEP Waste**' as an enhancement case; there is strong support to eradicate pollution of rivers despite the high cost.	Proceeded with key parts of our WINEP (Wastewater) enhancement programme with certain elements being deferred into AMP9. See Table 3.13 for rationale and trade-offs.

4.4. We gathered views on our final plan in the second round of acceptability and affordability testing

We tested the acceptability and affordability of our final plan with customers in August-September 2023 with the best information available at the time. The plan tested was similar to the 'Alternative plan' from the first round of testing, with some aspects of WINEP deferred into AMP9, a refined list of discretionary enhancements and improved performance levels for Performance Commitments where customers wanted to see more ambition (leakage and river pollution). Overall, the performance levels and outcomes that that will be delivered by our final plan are similar or better than those tested with customers.

The estimated bill impact tested was an average annual household bill of £571 by 2030, excluding inflation (up £154, 37%, from average 2022/23 bill). The average annual household bill for our final plan is £611 (up £194, 47%, from average 2022/23 bill). This is £40 (7%) higher than the bill tested with customers. Given the difference, if time had allowed, we would have re-tested our plan with customers ahead of submission to understand what effect, if any, this had on their views on affordability. We will continue to engage with customers and stakeholders on our plan, and note that the bill impact and bill profile will evolve as our plan evolves and we expect this to form part of our ongoing engagement.

The findings of this testing are proportionally weighted results from quantitative surveys with customers receiving both water and wastewater services from Thames Water, and customers receiving wastewater services from Thames Water and water services from Affinity Water.

We did not survey our wastewater customers in other water supplier areas, as each of these areas represents under 10% of our overall household customer base (South East Water 6% of our customers; Sutton & East Surrey Water 5% and Essex & Suffolk Water 4%). South East Water and Sutton & East Surrey Water also tested our wastewater bill together with their water bills, but the results of this testing were not available in time to include within our submission. Essex & Suffolk Water did not test our wastewater bill with its water customers.

In the surveys conducted by Affinity Water, South East Water and Sutton & East Surrey Water, customers were presented with a bespoke combined bill using our wastewater bill figures and the water bill figures from the relevant water company. The bespoke future annual bill amounts tested by Affinity Water and Sutton and East Surrey Water were calculated from indicative average annual wastewater bill values for our 'Proposed plan' shared with customers in our qualitative research in April and May 2023 (a household bill of £252 by 2029/30, excluding inflation), and were therefore different to the wastewater bill amounts tested by South East Water and in our own surveys (a household bill of £280 by 2029/30, excluding inflation), due to fieldwork being carried out before our revised bill figures were available.

The results of the surveys showed that:

- Overall, 20% of customers said the plan would be easy to afford, with 48% finding it difficult to afford.
- 29% of customers said that the plan would be neither easy nor difficult to afford.
- The proportion of customers finding the plan difficult to afford was higher for both vulnerable customers (56%) and customers struggling to pay their bills (85%).
- Households with lower incomes were significantly more likely to find the proposed plan difficult to afford (75% for incomes up to £15,999 vs.15% for those over £104,000).
- 65% of customers found the plan acceptable and 20% found it unacceptable.
- The main reasons given for acceptability were that customers support what we are doing in the long term and that the plan seems to focus on the right areas.
- Unacceptability was due to customers not trusting us to make the improvements and the perception that company profits are too high and that companies should pay for the improvements.
- Our wastewater only customers had similar views on both affordability (19% easy to afford) and acceptability (64% acceptable) to customers receiving both water and wastewater services from us (20% easy to afford and 65% acceptable).
- Non-household customers found the plan both easier to afford (32%) and to be more acceptable (75%) than household customers (16% easy to afford and 62% acceptable).

In addition to the questions mandated by the Ofwat/CCW guidance, we included a question at the end of the survey to test affordability of the plan after customers had been provided with information on what we plan to deliver in key Performance Commitment and discretionary enhancement areas.

When compared to responses from earlier in the survey, levels of customers findings our plan difficult to afford reduced by 8 percentage points from 48% to 40%. We believe this reduction points to customers believing our plan provides better value for money once they understand the benefits they will receive as part of the plan.

Due to the low proportion of customers saying the plan is easy to afford across all customer types, it is essential that we provide an ambitious and progressive package of affordability support for our customers. Our specific proposals for addressing the overall affordability of our plans and the provision of support to customers who are struggling to pay, and those households who are below the Affordability Threshold, can be found in TMS07 Bill Impact, Affordability and Vulnerability.

For a summary of the CCG's challenges on our approach to acceptability and affordability testing and our responses please see their final report TMS05 CCG Report.

4.5. Customers and stakeholders shared their views directly with us in our first 'Your Water, Your Say' open challenge session

Alongside the first round of acceptability and affordability testing we also conducted our first 'Your Water, Your Say' open challenge session on 19 May 2023. In the interests of transparency members of our Executive team and Board took questions directly in an open forum. It was a valuable opportunity for customers and other stakeholders to pose questions and provide feedback on key features of our plans, as well as local priorities or service issues they would like to see addressed in our plans and ongoing delivery.

To help inform the conversation we shared a short presentation on what our company does and our draft plan proposals for 2025-30 (based on the 'alternative' plan examined in the first round of acceptability & affordability testing research).

Customers and stakeholders were invited to ask questions on the topics of:

- Safe, clean, and reliable water
- Good customer service and supporting communities
- Healthy rivers and a thriving environment
- Investment and governance

We have provided a summary in Table 4.3 below of the concerns and queries raised by attendees of the first Your Water, Your Say session and outlined how we plan to respond to and address these issues in our plan.

Please see our 'Your Water, Your Say' report[58] for a full written record of the session. Evidence of our full compliance with Ofwat's guidance can be found in our Your Water Your Say approach document[59].

In line with Ofwat's requirements, we will hold a second 'Your Water, Your Say' session on 30 November 2023 following the submission of our PR24 proposals to Ofwat. The purpose will be to allow customers and stakeholders to question us on whether and how the issues previously raised are addressed and to pose new questions.

[58] Thames Water Your Water Your Say report, 19 May 2023 https://www.thameswater.co.uk/media-library/home/about-us/regulation/your-water-your-say/your-water-your-say-meeting-report.pdf
[59] Thames Water Your Water Your Say approach, August 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/your-water-your-say-approach-august-2023.pdf

Table 4.3: Your Water, Your Say Summary

Theme	Area	What we heard	Example questions from attendees	How we are addressing in our plan
For Customers	Customer experience	Customers voiced frustrations with day-to-day service issues and asked us to clarify how we are investing to improve the way we handle complaints in our PR24 plan.	*'Is Thames Water going to put additional funding into complaint handling in the next funding period? A customer had a problem with a water meter installed at their property, which was capturing the supply of her neighbours as well. This customer has been calling Thames Water repeatedly since September 2022 and has been unable to resolve the problem.'*	We are speeding up resolution of issues and keeping customers updated to improve our C-MeX score in-line with the industry average and reduce complaints. We will reduce the number of customer issues occurring in the first place. We will resolve more billing and operational issues within 24 hours. We will proactively keep customers updated so they will only need to contact us once to get their issues fixed.
	Vulnerable customer support	Customers told us they would like to see further detail on how our plan will deliver inclusive services that meets the needs of vulnerable customers and communities from 2025 to 2030	*'Have you or will you be engaging with stakeholders in your region to develop a consumer vulnerability strategy outlining how you will deliver inclusive accessible services and protect customers and communities for 2025-30? When will this be published and how will it be updated?'*	We are expanding our PSR through data sharing to make sure all eligible customers are offered it and we will increase the number of inclusive service propositions.
	Affordability	Customers and stakeholders want us to provide additional support to those struggling to pay and expect our plans to clearly show the total financial support package we will be providing over the next five years	*'How much financial support in total in pounds do you propose to make available to customers struggling to afford their water bills in 2025 to 30 and how much or what percentage of financial support will be funded from shareholder profits?'*	We will make it easy for customers to see that our services are value for money and offer new value-add services and incentives to support customers. We will continue to fund debt advice and offer our payment matching programme. We will partner with others to raise awareness of the affordability support available and increase the number of customers on an active payment plan.

				We will explore innovative tariffs which will allow us to support more customers with a social tariff and reduce bad debt.
For Communities	Transparency	Customers would like us to demonstrate transparency about the company's finances, including shareholder investment and profits, and how customers' money is spent.	*'People will have seen the announcement from Water UK yesterday. They've seen the plans that you've put forward in this presentation today. It's a very sort of simple question really, which I'm sure we've got a more complicated answer, but who's paying?'*	We remain committed to transparent reporting within our Annual Reports and in accordance with legal and regulatory requirements, including Ofwat's Board leadership, transparency, and governance principles. The Summary Version of our plan explains what our proposals for 2025-2030 will mean for customers' bills, how much our shareholders will invest over this period and a breakdown of how we spend every £1 we receive in revenue.
	Impact of roadworks	Customers told us that reducing the impact of roadworks is important and they want to understand how we plan to improve performance.	*'…the amount of time it takes in traffic sensitive areas for jobs to be done…often go way beyond the dates that are posted and have many, many hours of dead time within those work periods, and then get finished outside of normal working hours. And if we talk to the contractors, dismiss questions with excuses about it being an emergency and all the rest of it when it clearly isn't.'*	We have proposed a bespoke Performance Commitment in this area focused on driving greater collaboration and reducing disruption of roadworks.
	Public purpose	Customers and stakeholders challenged us on how public purpose has influenced our PR24 business plan proposals and asked us to demonstrate where we go above and beyond core our core water and wastewater service.	*'How does your public purpose influence your business plan proposals in terms of where you go above and beyond core water business services? How are you planning on supporting citizens rather than just customers during the next AMP?'*	Our AMP8 strategy to have even greater, positive impact on our communities is supported by five pillars: 1. A diverse, inclusive workforce that represents the customers we serve 2. Investing in local communities 3. Minimising our impact (including our bespoke Performance Commitment on Collaborative Streetworks)

				4. Protecting and enhancing biodiversity (including our Performance Commitment on Biodiversity) 5. Providing access to our sites for recreation. These pillars and Performance Commitments guide work that will help us to invest in and build partnerships with local communities, and reduce the impact of disruptive aspects of our work on them.
For the Environment	Leakage	Customers asked for more information on how we plan to address leakage and when we would be able to share greater detail on plans to tackle issues at the neighbourhood level.	*'I'm just intrigued by the challenge of the very large number of leaks in the streets and in pavements and the fact that they happen relentlessly all year round and the works have not been very well managed. So, I'm intrigued by what plans there are, in detail, for the renewing the infrastructure in our area? Which streets are going to see new pipes, new sewers? Where can I see those plans?'*	We will continue to find and fix leaks and use smart meters to locate them. We will better manage pumps, valves and water pressure to reduce strain on the network. Our activities will deliver a 37.1% reduction in leakage by 2030 (from 2020 baseline).
	Future water supplies	Customers wanted us to confirm how we will proactively help domestic customers and small high water dependent business prepare and be resilient in the face of climate change.	*'Climate change is resulting in increased extreme weather events including drought, heatwaves, increased water supply interruptions. How will you proactively help your domestic customers and small high water dependent businesses to prepare to be more resilient to these changes so their negative impacts are lessened or prevented?'* *'When will we all get smart meters?'*	We will continue our rollout of smart meters and increase total penetration to 75% of our household customer base by the end of AMP8. We will also implement our targeted water efficiency campaign, including smarter home and business visits, as well as targeted customer engagement via email. This is covered in our WRMP Demand Enhancement Case.

	Pollution incidents	Customers and local stakeholders are concerned about storm discharges and river health, and want us to ensure our plans are tackling these issues and that we are being ambitious with our targets.	*'I'm appalled by the consequences of water companies' involvement in (sewage discharge into rivers). Why are we behaving like a third world country? What do you plan to do to clean up your image?'* *'…keen to understand what percentage that will reduce discharges and with lots of house building going on now, what's in the pipeline for future upgrades to support this as well.'*	We will repair, reline and replace old and damaged sewers, and provide more storage on our sewer network. We will also add monitors and alarms to our sewers so we get early warning of potential pollution incidents, and continue to clean sewers and educate customers to help reduce blockages.
	Bathing water	Customers told us they enjoy using rivers and waterways to stay active for their health, mental wellbeing, and to connect with nature. While they think it is positive we publish data on real time sewage discharges, they wanted to understand how we are prioritising reductions and promoting safety at designated recreational locations.	*'Millions of people enjoy paddling on our waters to stay active for their health, mental wellbeing, and connect and protect nature. We're moving plastic pollution and invasive non-native species. How are you prioritising reductions of sewage discharges at popular recreational locations? For example, those in their canoe clubs and paddle sports centres, which are not designated as bathing waters which can impact on public health.'*	On top of reducing spills into rivers, we will work to remove more phosphorous from treated water entering rivers, and undertake activities relating to chemical investigations, invasive species, eels and fish passage, bathing water, biodiversity, habitat, flow monitoring, river monitoring, nutrient neutrality.

4.6. Customers shared their views on options for the mix and sequencing of key investments in our Long-Term Delivery Strategy

In September 2023, in research on our Long-term Delivery Strategy, we tested with customers example options for the mix and sequencing of the key investments and outcomes to 2050, theoretical options for phasing investment and bill impacts over the longer-term, and whether an indicative example bill profile for our proposals to 2050 was considered to be fair and affordable for current and future customers.

The findings from the qualitative discussion groups showed that:

- Most customers thought our long-term plans were broadly acceptable in terms of priorities for investment identified and coverage of improvements to be delivered.
- However, many customers would like targets to be met quicker and/or to be more stretching for reducing the risk of lead in drinking water, pollution of rivers and bathing waters, reducing sewage spills into rivers and sewage flooding of properties.
- The vast majority of customers preferred gradual and predictable bill increases. This was perceived to be the fairest option as it does not place excess burden on either future or current customers, is most in line with customer expectations and therefore is easier to budget and plan for.
- When presented with an indicative example bill profile including bill amounts to 2050, most customers reluctantly agreed that bills will need to increase, and that they would be able to manage their water bill in future.
- Affordability was difficult to assess for some, with so many unknowns this far into the future, and in particular future customers struggled to imagine how they might be able to afford the 2050 prices.
- Even amongst those customers who found the bill projections unaffordable, they could not identify improvement areas they would want to remove or reduce in order to lower bills – once they were aware of them, customers thought they were all needed.

For a summary of how customer and stakeholder insight has informed our Long-Term Delivery Strategy, please see TMS06 Our Long-Term Delivery Strategy.

5. Customer challenge

5.1. Customers and their representatives have challenged our business plans and long-term strategy and continue to challenge our ongoing delivery

Ofwat expects customers and their representatives to be able to challenge our ongoing performance, business plans and long-term strategy. It defines the purpose of customer challenge as companies receiving feedback on what issues matter to customers, what their views are on various aspects of companies' activities, and to enable customer comment on how well plans reflect their needs, priorities and preferences.

Our primary mechanism for customer challenge is our independent Customer Challenge Group (CCG). We also invite challenge through ongoing stakeholder engagement, for example at our Annual Stakeholder Review or council scrutiny meetings, and through the Your Water, Your Say open challenge sessions (see Section 4 'Testing our plan with customers and inviting challenge').

The CCG and wider challenge mechanisms help us to ensure challenge is as representative as possible and open to all customers and relevant stakeholders. They also enable us to meet Ofwat's minimum standards, as described in Table 7.3: How we meet Ofwat's minimum standards for customer challenge. Our challenge arrangements complement our programme of customer research and engagement, as described earlier in this document.

5.2. Our primary mechanism for customer challenge is our independent Customer Challenge Group

Our CCG was formed in January 2022 and brings expertise in communications, behaviour change, customer protection, community engagement, and inclusion. Members of our CCG have been chosen to reflect the diversity of the region we serve, and their profiles can be found in TMS05 CCG Report.

The CCG is an independent and critical friend to Thames Water. It constructively challenges us on:

- The quality of our engagement with the customers, stakeholders and communities we serve
- The extent to which customer priorities are reflected in what we do
- Our delivery against those priorities

The CCG has identified five areas of particular focus for their work and agreed the following outcomes. We indicate how each corresponds to the areas where Ofwat considers challenge can have a meaningful role, as set out under the 'comprehensive' standard in its customer engagement policy.

1. **Performance:** In delivering its performance outcomes, Thames Water reflects customer interests, improves environmental awareness, and engages with wider and political issues important to citizens and communities. (Addresses the Ofwat themes of **customer service, water and wastewater services, and performance levels**.)

2. **Inclusivity:** Thames Water understands and responds to the diverse needs of current and future customers, in particular those who are generally less heard from. (Connected to the Ofwat theme of **customer service**.)
3. **Choices:** Thames Water's criteria incorporate, and respond to, the needs of different stakeholders and customer groups in strategic decisions for the longer term. (Addresses the Ofwat theme of **significant investment**.)
4. **Affordability:** Thames Water understands bill impacts on all of its customers and their expectation of fair and affordable bills, especially in the context of the cost of living crisis, and this is reflected in Thames Water's business plan and in its support for customers. (Addresses the Ofwat theme of **bill impact**.)
5. **People:** Thames Water's workforce, culture and profile means that it better understands and interacts with its customers, wider society and local communities.

To build CCG understanding and to allow ongoing and focused opportunity for challenge, the CCG nominated a small number of representatives who have been engaging on certain topics in more detail. This includes, but it is not limited to, the development of the PR24 submission (e.g. prioritisation criteria, deliverability constraints, financial analysis), Customer Engagement (e.g. Acceptability & Affordability Testing and Your Water, Your Say engagement), Vulnerability, and Long Term Plans (e.g. Water Resources South East).

A full account of the CCG's activities and how it helps us to meet Ofwat's minimum standards for customer challenge can be found in TMS05 CCG Report which has been independently authored by the CCG. The CCG Report includes the remit of the Thames Water CCG, the Chair's and members' profiles and how the group has operated.

In the interests of transparency, the CCG publishes its meeting minutes and reports on the Thames Water website[60].

5.3. We have taken account of CCG challenges

The CCG have challenged Thames Water extensively throughout the development of our Business Plan, as well as on our ongoing delivery for customers. Key challenges and our responses are included in the CCG Report, alongside detailed feedback provided on all customer research projects. As well as its report, the CCG has also published its Challenge Log on the Thames Water website. The log provides a summary of the ongoing engagement between the CCG and Thames Water, including detailed challenges, in-depth comments and requests for action, grouped around the CCG's five priority themes. In Table 5.1 we show examples of CCG challenges and how they have been addressed.

Table 5.1: Examples of CCG challenges and how they were addressed by the company

Theme	Challenge and how addressed in ongoing performance, business plans and long-term plans
Social media strategy (Performance)	The CCG noted the volume of Thames Water related news across all media and the increased importance of social media. It challenged us on how we respond to posts. We held a workshop with CCG representatives to discuss our social media strategy. In response to CCG challenge, we have

[60] CCG section of Thames Water website https://www.thameswater.co.uk/about-us/performance/our-customer-challenge-group

	developed a playbook of scenarios for how and when we will proactively respond.
Inclusive customer engagement (Inclusivity)	The CCG challenged Thames Water on the inclusivity of our customer engagement and asked for stronger evidence to show how research and feedback includes views from customers who are generally less heard from or are in vulnerable circumstances and from future customers. To build a robust evidence base, we have completed dedicated vulnerability deep dive qualitative research with people in vulnerable circumstances. We also recognised that while future customers are included in our sampling methodology, more could be done and we commissioned additional customer research with future customers, including on our long-term strategy. Outputs of both research studies have been included in our What Customer, Stakeholders and Communities Want (WCCSW) document. In addition, following a separate CCG challenge in relation to the non-household segment, we now conduct face to face household and non-household research separately to ensure the different customer groups responded in the correct context. CCG also questioned the inclusion of the non-household perspective in our plan development. In response we ensured that the findings from non-household customers are better drawn out in our WCCSW document.
PR24 prioritisation criteria (Choices)	The CCG have continuously challenged us on our approach to prioritisation and the trade-offs we need to make as a part of key strategic decisions for PR24, especially looking for evidence of the magnitude of harm, customer preferences and how we deal with tensions and divergence of views. We have developed and refined prioritisation criteria to help evidence key decisions made as a part of PR24 development and engaged the CCG through the refinement to take on board their comments and challenges.
Affordability	The CCG scrutinised our approach and proposals to optimise and develop our Social Tariff, especially around the eligibility criteria, and ensuring we were mindful of the cost of living crisis. They recommended we conduct robust analysis to identify customers who are currently eligible but may not be in the future, allowing us, and others, to understand the customer impact. Throughout the development of our Business Plan, CCG have been acutely aware of the increasing cost of living crisis and were keen to understand the bill impact on customers and how our affordability support would mitigate this. We have held regular sessions with CCG on this and engaged them on all aspects including customer research on the potential use of innovative tariffs to increase the available funding. The research we conducted on the lived experience of customers that need extra help in our region focussed on the diverse cultures and communities that we serve, and the CCG helped us shape the audience we surveyed, and questions asked.

	They have challenged us to demonstrate how we will track consistent outcomes for our customers from these different communities, which led to development of our success measure of narrowing the range of take up of affordability support between different communities.
Correlation between service and culture (People)	The CCG challenged us on the absence of metrics which evidence the correlation between customer service and the company's culture. In response we used the latest results of our employee engagement survey to understand whether there is a correlation between customer and employee satisfaction.

5.4. Our Board has listened to customer challenge

Our Board has listened to customer challenge and can demonstrate how our plans and delivery take account of matters important to customers highlighted through the challenge process.

Our customer research (covered in Section 2) and Line of Sight documentation (covered in Section 3) show how our PR24 decision-making takes account of matters that are important to customers. In Section 6 we demonstrate how the Board oversees this process.

Our end-to-end customer engagement process is also subject to scrutiny and challenge from our CCG. Through its scrutiny of our engagement and our development and delivery of plans, the CCG highlights matters important to customers and challenges us to address them, as evidenced in the Challenge Log and illustrated by examples in the previous table.

The challenge process – both the challenges themselves and how we are responding to them – is in turn overseen by our Board.

To make sure there is an ongoing, two-way engagement between the Board and the CCG, the CCG Terms of Reference include minimum expectations on interactions during the year. In addition, there is regular engagement between the CCG Chair and Chair of the Thames Water Board, as well as with the Chairs of the Customer Service (CSC) and Regulatory Strategy Committees (RSC). We also share all CCG minutes with the Board.

Table 5.2 summarises the direct interactions between the Thames Water Board and its committees and the CCG.

Table 5.2: Board oversight of customer challenge

Touchpoint	How the Board was engaged and feedback provided
June 2022	In June 2022 the CCG Chair attended meetings of the Board Regulatory Strategy Committee (RSC) and Customer Service Committees (CSC). The CSC meeting focused on a customer service update and C-MeX performance and improvement plans, providing an opportunity for the CCG Chair to challenge on the proposals, which were previously shared with the full CCG. The RSC discussion focused on development of the PR24 plan. The CCG Chair shared key themes from recent CCG discussions, recommending that the

	company look to simplify language and narrative with customers. Both parties agreed that getting CCG input ahead of PR24 submission will be key. It was noted that CCG were developing a challenge log, which consists of all their challenges and company responses.
July 2022	In July 2022, as a part of the review of annual performance, the CCG published their first annual report which was shared with the Thames Water Board. In addition, the CCG Chair, on behalf of the CCG, raised the importance of simplifying what the company does to better engage customers; connect the vision with the performance reporting; and review the sequencing of programmes for quicker and more discernible enhancement to customer experience.
December 2022	In December 2022, the Chairman of the Thames Water Board and Chair of the RSC attended the full CCG meeting where they had the opportunity to hear first-hand discussion and challenges focusing on all aspects of company performance (specifically Water Quality, Supply Interruption, Leakage, C-MeX and Vulnerability metrics), Digital Transformation (e.g. improvements delivered through reimagined journeys which deliver benefit for front line staff and enable them to deliver a better experience to customers, or website improvements) and aspects of planned public engagement to inform the development of the Business Plan (including Acceptability and Affordability Testing and the Your Water, Your Say Open Challenge Session). The session concluded with a discussion between the Chairs and CCG focussing on four broad areas: pace of improvement; customer communication and their relationship with water; regulation and conflicting demands; and lastly the role of CCG including what is in and out of scope.
January 2023	In January 2023 the CSC Chair and CEO attended a CCG meeting at the Thames Water operational centre. The session focused on PR24 (including the implications of Ofwat's final methodology and public engagement to inform the development of the plan), as well day-to-day operations such as Incident Management and performance issues such as pollutions and blockages. Board representatives had the opportunity to directly hear the CCG's challenge on the importance of building future resilience and impacts of climate change, as well as proactive collaboration between the company and local stakeholders to improve the planning and response to operational incidents.
March 2023	In March 2023 CCG Chair attended the RSC and CSC meetings. The CCG Chair provided an update on the work CCG have done as part of the PR24 process as well as other work in their key five areas. The Chair noted that work of the CCG is cognisant of current media interest in Thames Water's performance. As part of the RSC attendance, the CCG Chair shared key themes from CCG discussion and engagement on PR24, and highlighted that key area of focus for CCG is ensuring the voice of the customer comes through clearly in the plan and strategic decisions taken. Part of the discussion focused on Board assurance, and it was agreed that a workshop would take place with the committee chairs and the CCG Chair to ensure that sufficient information is provided.

	Focusing on leakage engagement, the CCG Chair highlighted the importance of leakage to customers and suggested that areas for improvement include the ability for the customer to report leaks as well as view updates on the time to fix leaks.
July 2023	On 13 July 2023 the chairs of the Board CSC, Board RSC and CCG met with company and CCG representatives to discuss board oversight of customer engagement and customer challenge. They considered Ofwat's expectations of company boards on customer challenge and the evidence we had gathered so far to demonstrate compliance. The CCG members present at the 13 July meeting were broadly content with the quality of our customer engagement, our Line of Sight process and our response to challenges received so far. On Line of Sight, the CCG Chair took the opportunity to remind the Thames Water team that the CCG had yet to see our final plan and have opportunity to challenge our choices and underlined her wish for this to be shared with the CCG as soon as possible. The CCG Chair attended the Thames Water Board meeting on 31 July 2023 and shared the CCG's draft report with Board members in advance, including a summary of key challenges. The Board welcomed CCG's presentation and highlighted the importance of hearing their views.
August 2023	In August 2023, we shared with the Board CSC and RSC Savanta's Phase B assurance report including our challenge arrangements and further recommendations. The CCG Chair attended the Board's 24 August meeting to provide the CCG's view on the company's PR24 narrative which the CCG would be reflecting in their updated CCG report. CCG Chair themed her presentation on the Plan itself, Pricing, forward looking Prospects, Public Value and the longer term implications and Promises. Thames Water Board welcomed the presentation and the strength of the CCG's challenges ahead of their deliberations.
September 2023	The Thames Water Chairman attended the CCG's meeting on 7 September 2023 and shared his reflections on the company's position and feedback from the Thames Water Board meeting on 24 August where the PR24 plan was discussed ahead of its finalisation later in the month. The CCG Chair and vice-Chair attended the RSC on 26 September to share their final reflections on the CCG report and CCG's engagement beyond PR24. In September 2023 we shared Savanta's Phase D report with the Board, which confirms that *"Thames Water has an appropriate mechanism in place for customers and their representatives to challenge its ongoing performance, business plan and long-term strategy, and for detailed responses to this challenge. Thames Water's Customer Challenge Group (CCG) is the primary conduit for customer challenge, and provides Thames Water with feedback on these points on an ongoing basis, with Thames Water responding to these challenges in turn. We have assured the adequacy of this mechanism."* All Savanta's recommendations from Phase B on customer challenge were addressed by providing further evidence. In addition, an exhaustive list of CCG challenges has been incorporated in the final version of CCG report.

6. Board assurance

6.1. Our Board has overseen our customer engagement and provided assurance on its quality and use

Ofwat expects company boards to provide assurance of the quality of customer engagement and that customers' views have been taken into account in business plan and long-term delivery strategy.

The Board Customer Service Committee (CSC) has taken a lead in overseeing the quality of our engagement and the Regulatory Strategy Committee (RSC) has overseen the extent to which it has been used to inform our PR24 plan (the second half of our Line of Sight engagement process). Both committees have been shown and reviewed customer engagement evidence.

Please see Table 6.1 for examples of how the Board has exercised oversight of our customer engagement. In addition to the customer engagement-specific touchpoints listed, the Board and its committees were also regularly consulted on how planning and strategy teams were using customer engagement to inform their proposals. Please see Table 5.2 'Customer challenge' for details of how the Board has overseen our customer challenge arrangements.

To support the Thames Water Board in providing a statement that our customer engagement and its application meets the required standards and relevant best practice, we commissioned independent expert assurance of:

1. Our customer research programme as a whole
2. Individual research elements
3. Triangulation of research findings and other data
4. How we consider customers' views in our decision making and reflect their needs, priorities and preferences (Line of Sight)
5. Customer challenge

The independent experts, Savanta, began their review of our end-to-end customer engagement in March 2023, issued interim reports in April (Phase A) and August 2023 (Phase B), and reported their final conclusions (Phases C and D) to the Board in September 2023[61].

The scope and outcomes from all independent assurance work have been shared with the Audit, Risk and Reporting Committee (ARRC). The ARRC has provided independent oversight and challenge on the development and quality of the Business Plan on behalf of the Board. Please see TMS48 Our Assurance Framework.

Please see Table 7.4 for details of how we meet Ofwat's minimum standards for the assurance of customer engagement.

[61] TMS50 Customer Engagement Assurance Phase D, Savanta, September 2023

Table 6.1: Board oversight of customer engagement

Principal touchpoints	How the Board was engaged and feedback provided
November 2021	In November 2021, as part of a report on wider PR24 planning, we presented to the RSC an overview of our engagement plan, which reflected our experiences at PR19 and emerging Ofwat guidance. We set out what we planned to engage on, with who, and when. Please see Section 2.1 'We have learned from our experiences at PR19' for a summary of some of the key principles underpinning our PR24 customer engagement strategy.
June 2022	In June 2022 we reported to the RSC on our latest understanding of customer priorities and how our emerging business plan addressed them. We reiterated the need to demonstrate we have made choices for AMP8 that reflect our customers' priorities, explaining where we have not been able to deliver on customers' expectations.
November 2022	In October 2022 the Thames Water Customer Research & Insight team reviewed our customer research programme to date, including individual research studies. They also reviewed our customer challenge arrangements. Sia Partners, who have advised us on Triangulation and Line of Sight, provided an expert but not independent review of this aspect of our engagement[62]. The conclusions were reported to the RSC and CSC meetings in November 2022[63]. At the November 2022 meetings the Board RSC and CSC were also shown evidence from our customer engagement and research, as well as Line of Sight documentation which demonstrates how customers' views had informed our decisions. The CSC requested further reports on the quality of our engagement and the RSC on Line of Sight.
March 2023	In March 2023 we consulted the RSC on our approach to the engagement we conducted on our draft plan[64]. The paper covered the first phase of acceptability & affordability testing and the first 'Your Water, Your Say' open challenge session, and dealt primarily with the question of which versions of our emerging PR24 plan to consult customers and stakeholders on and when. Discussion at the meeting, which included the CCG Chair, centred on the choice of plan options, compliance with Ofwat guidance and the importance of ensuring customers could understand the information so they could provide a meaningful view.
May 2023	In May 2023 the CSC was provided with an interim Phase A report from Savanta, the independent outside experts who have supported the Board in assuring that our customer engagement and its application meets the required Ofwat standards[65]. We also shared a draft copy of this technical appendix document, where we provide evidence of the quality of our engagement, and the latest version of our 'What Customers, Communities and Stakeholders Want' document, in which we consolidate our understanding of preferences and priorities.

[62] Silver Plan Line of Sight Review, Sia Partners, September 2022
[63] Board ownership of PR24 customer engagement, report to TWUL Board RSC & CSC, November 2022
[64] Inviting challenge on our draft PR24 plan, report to TWUL Board RSC, March 2023
[65] Board ownership of PR24 customer engagement, report to TWUL Board CSC, May 2023

	Savanta's review was at that stage confined to the quality of our research conducted to date and how we had consolidated the findings from different sources. Savanta reported that they considered us to be 'on-track to deliver a customer engagement programme that is well-designed to provide robust and comprehensive insight to inform the organisation's PR24 business plan'. We confirmed to the CSC we were in the process of addressing Savanta's optional recommendations for further improvement. In response to the May 2023 paper, the CSC Chair requested a more comprehensive update on all Savanta's recommendations, including, for example, our plan to engage more with future customers. The CSC Chair also requested that Savanta's final report clearly state if they believe we are compliant or not in all the assurance areas.
June 2023	In June 2023 we reported to the RSC on our latest customer engagement evidence and the extent to which our draft plan was informed by customer views and, to the extent other considerations allowed, addressed customer preferences and priorities[66]. One of the directors noted that they considered the approach comprehensive, and they could track a clear line from the customer engagement to the prioritisation of the plan. Later in the month we responded to the CSC Chair's request that we provide an update on all the recommendations from the first PR24 customer engagement assurance report[67]. Please see Table 2.6 for a summary of Savanta's recommendations and how they were actioned. The CSC met on 5 July 2023 and noted the progress in addressing the recommendations.
July 2023	On 13 July 2023 the chairs of the Board CSC, Board RSC and CCG met to discuss board oversight of customer engagement and customer challenge. They considered Ofwat's expectations of company boards on customer challenge and the evidence we had gathered so far to demonstrate compliance. The RSC requested a further Line of Sight update for its 27 July 2023 meeting[68] at which it noted how customer views were shaping our Performance Commitment and Enhancement Case proposals, and how we were inviting challenge from the CCG.
August 2023	As requested by the CSC and RSC Chairs, on 23 August 2023 we shared Savanta's Phase B assurance report (on research, Line of Sight and customer challenge) and how we planned to address any further areas for improvement[69]. At the time Savanta confirmed we were on-track to be compliant against Ofwat's criteria, based on the available documentation and planned activities. We also provided an update on progress documenting Line of Sight. The CSC Chair noted the good progress being made and the positive assurance report.
September 2023	In September we shared Savanta's Phase C report[70] with the full Thames Water Board, in which Savanta confirmed our engagement programme is compliant with Ofwat's board assurance requirements for customer engagement, and

[66] Board ownership of PR24 customer engagement, report to TWUL Board RSC, June 2023
[67] Board ownership of PR24 customer engagement, report to TWUL Board CSC, June 2023
[68] PR24 Customer Line of Sight, report to TWUL Board RSC, July 2023
[69] PR24 assurance of customer engagement, report to TWUL Board RSC and CSC, August 2023
[70] Board audit trail, report to TWUL Board, September 2023

	their Phase D report, which confirmed we have followed the guidance for testing customers' views of the affordability and acceptability of our proposals, both in preparation for the Board Assurance Statement to be approved by the full Board on 28 September 2023.

7. Ofwat's principles and minimum standards

Ofwat developed standards for high-quality research, customer challenge and assurance of customer engagement[71]. The minimum standards were adopted for the price review, in addition to, and in support of, Ofwat's principles of customer engagement, which were established for earlier price reviews and refreshed for PR24.

7.1. Customer engagement

Table 7.1: How we followed Ofwat's principles of customer engagement

Principles	How we followed these principles
The right outcomes at the right price, at the right time	Our customer engagement programme focused on outcomes that are important to customers, society and for the environment, enabling us to plan for and deliver the right outcomes, at the right time, at a price they are willing to pay. We identified which outcomes were most important to customers. We built a plan that delivered these, balanced with deliverability, resilience, other stakeholder priorities and legal requirements. From this we costed our plan, challenged it for efficiency, then tested it with customers for acceptability and affordability. Also see Section 2.4 'We gather insights to improve our ongoing delivery and shape our business plan and long-term delivery strategy'.
Two-way and ongoing engagement: listening and talking	Our customer engagement overall is ongoing and two-way and helps us to continually improve our delivery for customers. Our engagement for PR24 was ongoing and two-way. It helped us understand what customers wanted so we could create plan proposals, which we presented back to customers (and to our CCG) to understand whether we had interpreted their priorities correctly. We used their feedback to further iterate our plans. See Section 2.4 'We gather insights to improve our ongoing delivery and shape our business plan and long-term delivery strategy'. Our transparent Line of Sight and challenge processes helped build legitimacy and trust. See Section 3 'Line of Sight' and Section 5 'Customer challenge'. We build partnerships and relationships with customers and communities, where we need to collaborate with them to address challenges such as driving down water demand (via our water efficiency campaigns and other interventions) and reducing sewer blockages (via our Bin It Don't Block It campaigns and other interventions). Also see Section 2.8 'We work with customers and communities to co-deliver better outcomes.
Meaningful and high-quality engagement	We had an ongoing research and engagement programme, which was targeted at areas that customers, communities and

[71] PR24 and beyond: Customer engagement policy – a positioning paper, Ofwat, February 2022

	stakeholders care about – and could readily understand – and where their views could have a genuine impact on our decision making. Also see Section 2.4 'We gather insights to improve our ongoing delivery and shape our business plan and long-term delivery strategy'. For further details of how we engaged in a way that was meaningful for customers and followed best practice see Table 7.2: 'How we have met Ofwat's minimum standards for high quality research'. For details of how our engagement led to a meaningful understanding of what customer wants see Section 3 'Line of Sight'.
Customise and provide context	Our ongoing engagement reflects the particular issues and circumstances that customers in our area experience. Also see Section 2.4 'We gather insights to improve our ongoing delivery and shape our business plan and long-term delivery strategy'. One way we provided context during customer engagement was by sharing comparative performance of other companies where possible, using definitions consistent across the industry, often sourcing this information from Water UK's Discover Water website. See Table 7.2: 'How we have met Ofwat's minimum standards for high quality research'. TMS04 'What Customers, Communities and Stakeholders Want'[72], where we have consolidated our understanding of customers' needs and expectations, includes examples of where specific groups of customers have needs and views that differ from customers more generally, which we can take into consideration when devising processes, policies and future plans.
Use of multiple sources of customer data	We used a robust, balanced and proportionate evidence base, using a range of techniques and data sources, including primary customer research and complaints and social media analysis, to support our understanding of customer priorities, needs, requirements, and behaviours. See Section 3 'Line of Sight' and TMS04 What Customers, Communities and Stakeholders Want.
Understanding current and future customers	We sought to engage with, understand and respond to the diverse needs of our customer base, taking account of regional, demographic, socio-economic and attitudinal differences. This included future customers, those in circumstances that might make them vulnerable and those previously under-represented in our research. Our engagement allowed customers to inform us on the phasing of investments for our long-term delivery strategy as well as the day-to-day service. For more details see Section 2.9 'Our PR24 research covers the right topics and customer segments and uses the right methodologies', Table 7.2: 'How we have met Ofwat's minimum

[72] TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023

	standards for high quality research', our 'Customer Research and Sampling approach[73] in Section 8 and Section 3 'Line of Sight'.
Consistency and comparability	We have adopted the results of the Ofwat/CCW-led collaborative research on the common areas of business plans in building our PR24 business plans. See Table 3.1: 'Our phased, iterative approach to triangulation'. Our engagement complemented the collaborative customer research. We implemented Ofwat/CCW's standardised approaches to the Your Water, Your Say open challenge sessions, and for testing customers' views of the acceptability and affordability of business plans. For evidence of how we complied with Ofwat guidance on acceptability & affordability testing and open challenge sessions please see our Acceptability and Affordability Testing qualitative and quantitative reports[74] and Your Water, Your Say feedback and approach reports[75]. Other research we conducted followed the standards for high quality research (see table 7.2, How we have met Ofwat's minimum standards for high quality research) and industry best practice, allowing it to be relied upon in decision making and compared to other research across the industry.
Protecting customers' interests	Customers and their representatives have been able to challenge our ongoing performance, business plans and long-term delivery strategy. See Section 5 'Customer challenge'.

7.2. High quality research

Table 7.2: How we have met Ofwat's minimum standards for high quality research

Minimum standards	How we have met these standards
Useful and contextualised	We only undertook research and engagement when the findings would have an impact on our decision making or add value to our business plan submission. This approach ensured we aimed for quality of research over quantity. See Section 2.6 'Our business plans and long-term strategy are informed by customers' views'

[73] Customer research and sampling approach 2023, Thames Water, September 2023 (see Section 8)
[74] Acceptability and Affordability Testing qualitative report, May 2023 and quantitative report, September 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/acceptability-and-affordability-testing-qualitative-may-2023.pdf https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/acceptability-and-affordability-testing-quantitative-september-2023.pdf
[75] Thames Water Your Water Your Say report, May 2023, and Thames Water Your Water Your Say approach, August 2023 https://www.thameswater.co.uk/media-library/home/about-us/regulation/your-water-your-say/your-water-your-say-meeting-report.pdf https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/your-water-your-say-approach-august-2023.pdf

	The context for each piece of research or engagement was articulated in a summary report, e.g. in the background, objectives and conclusions.[76] Where possible research findings have been presented alongside a wider evidence base, including research conducted by others. See Section 3 'Line of Sight' and TMS04 What Customers, Communities and Stakeholders Want[77]
Neutrally designed	We worked closely with our research agency partners to design and deliver every stage of a research project to be as neutral and free from bias as possible, from recruiting participants to questionnaire design to reporting. Where relevant we presented engagement participants with the full range of possible options to an issue, and explained the consequences for customer bills, service and wider society and environment. We included comparative information as a reference point, often on other water companies' performance, using definitions consistent across the industry, often sourcing this information from Water UK's Discover Water website. We acknowledged and explained in our research reports when there had been limitations to neutrality and our efforts to mitigate any potential biases[78].
Fit for purpose	We worked with our research partners to choose sample and methodology approaches that were appropriate to our objectives and would give meaningful insights, rather than just repeat methodologies that might have been used for similar objectives before. E.g. using our Customer Voices online community for some of our deliberative research rather than solely face-to-face workshops (as we did in PR19). The online deliberative approach allowed access to a wider range of customers (such as those not able or willing to attend face-to-face sessions), particularly during COVID pandemic conditions.[79] We worked with our research partners to ensure research materials were unbiased and comprehendible to customers, using Plain English and Plain Number approaches. We gave customers ample opportunity to express their views in full, e.g. including open ended questions as well as closed questions. We used innovative approaches where possible, for instance we used Artificial Intelligence in our PR24 foundation research[80] and

[76] All research reports can be found in the Insight Hub, with key PR24-related reports on our website
[77] TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023
[78] All research reports can be found in the Insight Hub, with key PR24-related reports on our website
[79] Thames Water Customer Voices is our online research community of over 1,000 household customers. It enables an ongoing conversation with a representative group of customers
[80] PR24 Foundation research – Thames Water Customer Voices and Twitter analysis, Verve, November 2021 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/foundation-november-2021.pdf

	WRMP consultation with customers[81] to analyse qualitative feedback from much larger samples of customers than would be practical through traditional research.
Inclusive	We used multiple insight sources and a mix of research and engagement methods to ensure we heard from all our different types of customers. We set quotas to ensure representative samples of customers or to target particular segments[82]. Our research findings identified where there were any differences between customer groups, and also where and why certain groups may have been excluded or under-represented. Individual projects may not have always represented the full range of customer types (e.g. some focus on specific groups like retailers or household bill payers or priority service customers, depending on the project topic), but our entire research and engagement programme aimed to be inclusive overall. See Section 2.9 'Our PR24 research covers the right topics and customer segments and uses the right methodologies'. See TMS04 'What Customers, Communities and Stakeholders Want'[83] which includes examples of where specific groups of customers have needs and views that differ from customers more generally.
Continual	Our research and engagement programme has been continuous and we used it to inform day-to-day service delivery, business plans and long-term delivery strategy. See Figure 2.1 Customer Research and Engagement Programme.
Independently assured	Our research and engagement programme was reviewed independently by an independent expert assurance partner. All relevant evidence was shared with them. See Section 6 'Board assurance'.
Shared in full with others	We set up a SharePoint site in partnership with the other water companies in the South East of England, to share our research with the wider water sector[84], and we also created a web page on our own website to share our research more widely with customers and the public.[85] Both sharing locations include research reports which include recruitment screeners, questionnaires, discussion guides and stimulus materials and separate data tabulations for quantitative projects. Care was taken to account for customer data protection and for commercial sensitivity when sharing documents. To comply with Ofwat requirements, other companies did the same and we took the opportunity to learn and adopt best practice

[81] WRMP consultation, customer research, Verve, May 2023 https://www.thameswater.co.uk/media-library/home/about-us/performance/our-customer-research/water-resources-management-plan-consultation-customer-research-may-2023.pdf

[82] Customer research and sampling approach 2023, Thames Water, September 2023 (see Section 8)

[83] TMS04 What Customers, Communities and Stakeholders Want v18.3, Sia Partners, September 2023

[84] Customer Research Sharing Hub, SharePoint for South East England water companies

[85] Our customer research - www.thameswater.co.uk/about-us/performance/our-customer-research - public area of Thames Water website

	methods. Examples are listed in Section 2.7 'We share our research findings and approaches and learn from others'. We have compared other's research findings with our own to develop our understanding of customer views, preferences and experiences. To complement the SharePoint, we participated in regular calls with the other South East England water companies – around once a month – and longer meetings in October 2022 and September 2023 where we shared our understanding of customers' priorities from different projects and insights triangulation. This helped us understand where and why there was consistency or differences across the region.
Ethical	Our customer research team are members of the Market Research Society and are advised and supported by expert independent research agencies, who in turn are members of and abide by the code of conduct of the Market Research Society.

7.3. Customer challenge

Table 7.3: How we meet Ofwat's minimum standards for customer challenge

Please also see Section 5 'Customer challenge' and TMS05 CCG Report.

Minimum standards	How we meet these standards
Independence	Our CCG acts at arm's length to our company with no restrictions and expectations placed on it. Our review of outputs from the CCG is limited to checking for factual accuracy, with no undue influence brought to bear. This applies to all outputs including meeting minutes and CCG reports. All conflicts of interests or links with the company are clearly explained and justified. Members are invited to declare any conflicts of interest at each meeting, and anything declared would be documented in the meeting minutes.
Board accountability	Our customer research (covered in Section 2) and Line of Sight documentation (covered in Section 3) show how our PR24 decision-making takes account of matters that are important to customers. In Section 6 'Board assurance' we demonstrate how the Board oversees this process. Our end-to-end customer engagement process is also subject to scrutiny and challenge from our CCG. Through its scrutiny of our engagement and our development and delivery of plans, the CCG highlights matters important to customers and challenges us to address them, as evidenced in the Challenge Log and illustrated by examples in the previous table.

	The challenge process – both the challenges themselves and how we are responding to them – is in turn overseen by our Board. To make sure there is an ongoing, two-way engagement between the Board and the CCG, the CCG Terms of Reference include minimum expectations on interactions during the year. In addition, there is regular engagement between the CCG Chair and Chair of the Thames Water Board, as well as with the Chairs of the Customer Service (CSC) and Regulatory Strategy Committees (RSC). We also share all CCG minutes with the Board.
Ongoing	The CCG examines Thames Water's day-to-day delivery for customers, as well as during the development of business plans and our long-term delivery strategy. As demonstrated by CCG meeting agendas, meeting material and minutes, and the Challenge Log which is being developed to record all challenges made and our response to them.
Informed	Effective challenge from the CCG has been enabled by its use of comparative performance (over time and relative to other companies). We share some comparative information as part of performance calls and in customer research materials. Industry wide reports such as the EA's environmental performance assessment or Ofwat's serviceability report provide an additional layer of comparative information. In addition we provide CCG with daily media summaries which include not only company specific information but also industry wide. The CCG has the time, resources and expertise to enable it to challenge effectively. The CCG has organised itself into smaller focus groups to maximise use of their expertise and to target their challenge. To enable effective challenge, the forward programme is reviewed on an ongoing basis.
Transparent	All CCG challenges and company responses are logged and reported publicly, including where no action has been taken and clear identification of areas of disagreement. We explain in Section 2 'How we engage customers' and Table 7.2: 'How we have met Ofwat's minimum standards for high quality research' how we have been transparent with customers about our relative performance levels by using information with definitions wherever possible that are consistent across the industry. We also address the expectation for timely publication of evidence of customer views gathered through research or engagement exercises. We show how evaluations of different business plan options have taken account of customer views. Please see Section 3 'Line of Sight'.
Representative	Members of the CCG represent a broad range of customers and stakeholders, reflective of the region we serve including local and national representatives. CCG members have the necessary expertise to enable effective challenge. Expertise includes communications, behaviour change, customer protection, community engagement, inclusion, and climate change.

	The CCG scrutinises our customer engagement and its application to make sure that the views of all end user customers (including household, business, under-represented, vulnerable and future customers) and intermediate customers (e.g. business retailers) are understood by the company and taken account of in decision-making. This is demonstrated by the engagement on the three focus areas (inclusivity, choices and affordability) as highlighted in the CCG report.[86] The additional non-CCG approaches mentioned in Section 5 'Customer challenge' have helped ensure challenge is as representative as possible and open to all customers and relevant stakeholders.
Comprehensive	The CCG has considered the full range of areas where customers can have meaningful views, including water and wastewater services, customer services, significant investment, performance levels, and bill impacts. This is demonstrated by meeting agendas, materials and minutes.[87] Challenge has focused on important and material or urgent issues relevant to our business plans and long-term delivery strategy for price reviews or wider decision-making. This is demonstrated in the ongoing Challenge Log. An exhaustive list of challenges and company responses are included in the CCG report which is in turn published on the CCG dedicated part of company website.
Timely	Our CCG arrangements allow sufficient time for effective challenge and we respond with a reasonable time period. We have a forward plan of formal meetings to offer opportunity for challenge but also have open channel of communication for any challenges raised between the meetings.

7.4. Board assurance

Table 7.4: How we meet Ofwat's minimum standards for the assurance of customer engagement

Please also see Section 6 'Board assurance'.

Minimum standards	How we meet these standards
Independent	We have appointed independent outside experts to review our customer engagement evidence. They have been appointed by the Thames Water Assurance team and report to Thames Water Board as part of our wider assurance arrangements. For a full account of the assurance and how it adheres to Ofwat's minimum standards please see Savanta's Phase D PR24 Customer Engagement Assurance report[88]. The report contains clear statements and evidence that the process was conducted independently of Thames Water. There were no restrictions on

[86] CCG Report, July 2022, and TMS05 CCG Report
[87] Meeting papers, agendas and minutes stored on the CCG SharePoint
[88] TMS50 Customer Engagement Assurance Phase D, Savanta, September 2023

	reporting. Thames Water's role was limited to checking for factual accuracy.
Transparent	We have shared all relevant customer engagement evidence with the independent experts. Evidence was not limited to customer research but also evidence of how we have taken account of customers' views in our business plans and long-term delivery strategy. Where we have not been able to take account of customers' views, we have demonstrated why not. The evidence we shared was factual, objective and comprehensive, not selective or interpreted. We have shared the assurance reports with our Customer Challenge Group.
Expert	The outside organisation that has undertaken the assurance has relevant expertise and was appropriately resourced. Savanta are a market research firm familiar with regulated utility companies, price reviews and customer challenge arrangements.
Comprehensive	Assurance has assessed the extent to which our customer engagement meets the standards for high-quality research and any other best practice, including how we have applied CCW's recommendations on triangulation. Assurance has also assessed the extent we have met the standards for customer challenge.
Board ownership	Agendas, papers and minutes for Board meetings demonstrate that the Board has overseen the customer engagement assurance process. The Board can demonstrate it has: • Been shown and reviewed evidence from customer engagement and research • A mechanism for inviting and listening to customer challenge (on both development and delivery of plans) • Developed confidence that company decisions take account of customers' views, preferences and experiences, including those highlighted through the customer challenge process • Satisfied itself that our business proposals and long-term delivery strategy are based on high-quality research and engagement The Board has provided a statement that our customer engagement and research meets the standards for high-quality research and any other relevant statements for best practice.

8. Supporting documents

The following supporting documents are included in this section:

- Customer research and sampling approach, September 2023
- PR24 triangulation and line of sight methodology, August 2023
- Water, Wastewater and Customer Service Engagement Summaries, September 2023

8.1. Customer research and sampling approach, September 2023

Customer research and sampling approach

Customer Research & Insight
and Stakeholder Engagement teams
September 2023

Purpose

This paper provides guidelines on Thames Water's research and sampling strategy for the customer research and engagement programme to support the development of the PR24 Business Plan, as well as business as usual research. This also covers engagement with stakeholders and communities for the purposes of gathering insights.

Our approach to high quality research and engagement

Our customer research and engagement follows key standards and principles, as issued by Ofwat in February 2022[89].

Standard for high quality research	Description
Useful and contextualised	Research should have practical relevance. It should be clear why the research has been undertaken, to what it will contribute and how. The research should be designed with quality rather than quantity as a priority (in other words, a better quality of research, rather than a larger quantity of research). As much as possible, research findings should be presented alongside a wider evidence base – including research conducted by others. The analysis should contextualise the findings and explain how they will be used.
Neutrally designed	Research should be designed and delivered in a way that is neutral and free from bias. The potential for bias and the ways to negate this should be considered at every stage of a project, and evidenced – including set up, question wording, question ordering, stimulus materials, selective use of quotes or data in reporting and interpretation of findings. If there is some inherent bias that is unavoidable or was an unintentional outcome of the research, this should be acknowledged and explained in the research findings.
Inclusive	Research should include different audiences and socio-demographics, considering local or regional or national populations, business customers and business retailers. Where possible, research findings should identify and report on variances by socio-demographics and consumer types (for example, bill payers, future customers). Research findings should provide details of those who may have been excluded or under-represented in the research. Where possible, research should use mix-method approaches to provide a more inclusive set of findings. While the range of representation may vary from project to project, the research programme as a whole should be demonstrably inclusive.
Fit for purpose	The research sample and methodology should be appropriate for the research objectives. Participants should be able to understand the questions they are being asked and surveys should limit the use of forced choice options. A research approach that has previously been challenged should not be repeated unthinkingly. Innovation is welcome if it is likely to lead to meaningful and trusted insight and learning.

[89] PR24 and beyond: Customer engagement policy – a position paper - Ofwat

Ethical	Research should be conducted in line with the ethical standards of a widely recognised research body – such as the Market Research Society or the Social Research Association.
Continual	Companies' research programmes should be continual, enabling day-today insight gathering, as well as specific and relevant research for informing business plans and long-term delivery strategies. This will allow areas of concern or change to be more easily identified and acted on.
Independently assured	Research should be reviewed by individuals or groups that are independent of water companies. Those reviewing research should have a range of relevant skills and experience and feel confident and able to challenge on all elements of research. Information shared with them should be relevant and timely. Water companies should be transparent about the research findings and whether, and in what ways, it has been used.
Shared in full with others	Research findings should be published and shared in full, as early as possible with as wide an audience as possible. This will add value to the evidence base on customers: • by allowing research approaches to be understood and improved on; • by building the shared knowledge base about customers' views, preferences and experiences; • by allowing research findings to be considered in a comparative way – meaning water companies can better understand their own customer base, by comparison with the findings from other areas. Research findings should always be accompanied by clear and detailed information on the methodology for the research. This should include, for example, recruitment screeners, questionnaires, discussion guides, and copies of any stimulus materials used.

Principles of customer engagement	Description
The right outcomes at the right price, at the right time	Customer engagement is essential to enabling water companies to deliver outcomes that are important to customers, society and the environment, at the right time, at a price they are willing to pay.
Two-way and ongoing engagement: listening and talking	Engagement means understanding what customers want and responding to that in plans and ongoing delivery, transparently, building legitimacy and trust. It also means involving customers in service design and delivery, providing education and sharing information to support their meaningful and active engagement. Engagement should not take place only at price reviews.
Meaningful and high-quality engagement	Water company engagement with customers must allow participation in a way that is meaningful to them, follow engagement best practice and lead to a meaningful understanding of what consumers want. It is the companies' responsibility to engage with customers and to demonstrate that they have done it well.
Customise and provide context	Engagement is not a 'one-size-fits-all' process but should reflect the particular circumstances of each company and its full range of

	customers. Wherever possible, information about comparative company performance should be shared with customers.
Use of multiple sources of customer data	A robust, balanced and proportionate evidence base, developed using a range of techniques and data sources should support companies having a genuine understanding of their customers' priorities, needs, requirements, and behaviours.
Understanding current and future customers	Companies should understand and respond to the diverse needs of customers, making sure they take into account different regional challenges, or variances in demography, outlook and socio-economic status. This also includes future customers and those in circumstances that might make them vulnerable or hard-to-reach. Engagement should support customers to inform the phasing of investments in long-term delivery strategies.
Consistency and comparability	In areas that are of common concern to all customers, and where it is most efficient and sensible to do so, evidence of customers' preferences should be generated in a consistent manner, set in the context of current company performance, producing results that are comparable across water companies in England and/or Wales.
Protecting customers' interests	Customers and their representatives must be able to challenge our ongoing performance, business plans and long-term delivery strategies. If this is not done effectively, Ofwat may challenge us on customers' behalf. Ofwat will use a risk-based approach and their understanding of customers' preferences to challenge company plans, intervening if necessary to fulfil their duty to protect customers' interests, in line with their statutory duties. The final decision on price controls is entrusted to Ofwat.

Other publications that guide our research and engagement approach:

Our research and engagement considers other guidance from Ofwat and CCW regarding best practice for engaging with customers.

Link to Ofwat's publications on customer engagement: Customer engagement - Ofwat

Links to CCW's publications on customer engagement:
Framework for water company research - CCW
Engaging water customers for better consumer and business outcomes - CCW

Who are our customers?

We take a broad perspective on who our customers are and reach beyond those with whom we have a direct billing relationship to the ultimate consumers of our service and those people directly or indirectly affected by us in their communities.

To help us understand what our service delivery, business plans and long term delivery strategies should look like, we gather insights from views across customers, communities and stakeholders, which we define as follows:

Household	Non-household	Developer
Those who use or pay for our services (15 million customers, 5.5 million bill payers)	Businesses and other organisations – who use our service and fund it indirectly (250,000 bill payers)	People and organisations connecting properties to our networks
Geographies and demographics	Different locations and firmographics	Homeowners extending their properties
Those who receive/pay for water and wastewater together (10 million household customers/3.5 million bill payers) Those who receive/pay for wastewater-only (5 million household customers/2 million bill payers) Those who receive/pay for water-only (50,000 household customers)	Different usage and dependencies on water: from large industrial users to those just using water for domestic purposes	Large developers who wish to connect to our clean water and wastewater networks
Billing and account relationships: tariff, metered or unmeasured, online account management	Retailers: 17 organisations who are licensed to handle retail issues and billing for non-household customers in our area	Self-lay providers who can partner with us to provide customers with the building work required to connect to our networks
Customers in vulnerable circumstances, who would benefit from our reduced tariffs (on a low income, struggling or at risk of struggling to pay the bill) or our Priority Services Register (with health conditions or other situational factors)	Landlords and Local Authorities/Housing Associations who may handle billing for household customers	New Appointments & Variations (NAVs) – organisations providing water, wastewater and billing services to customers in defined locations within our area
Future customers: children and young adults not paying bills yet		
Under-represented customers: who may not be included in research using traditional sampling methodologies		
Commuters, domestic and international visitors		

Communities	Stakeholders
Communities of customers in local and regional areas	Organisations who represent the interests of household and non-household customers, e.g. Citizens Advice, Age Concern, Chambers of Commerce, National Farmers Union
Groups of customers with shared interests, e.g. religious groups, anglers, students, young people	Elected representatives, e.g. councillors, MPs and London Assembly members
Smarter Water Catchment areas and other water catchment areas	Local authorities, regional and national government officials
Those living near sewage or water treatment works, roadworks, construction sites	Charities and NGOs, e.g. local or regionally focussed environment groups
Those impacted by one-off or ongoing incidents (e.g. sewage/river floods, polluted rivers, water outages, bursts, low pressure)	Our supply chain, e.g. construction and insurance sectors

Choice of research method

We have a range of methods open to us when conducting customer research. When commissioning research and choosing the most appropriate method we rely on the expert knowledge of our in-house customer research team, and the advice of our partner market research suppliers - reputable market research agencies who are all members of the Market Research Society and abide by its code of practice.

We decide what the right method is on a case-by-case basis. In the following table we summarise the strengths and weaknesses of the three principal customer research methods we use, and under which circumstances it is appropriate to use them.

Note: since the Covid lockdowns of 2020 and 2021 we've utilised online methods for qualitative and deliberative research more than before. We recognise that these methods exclude people with no/limited access to the internet, however they do enable individuals to take part that may not have normally had the time or ability to attend in-person focus groups or workshops - for instance, those that work full time, have family commitments, certain disabilities, financial issues or language barriers.

	Quantitative research	Qualitative research	Deliberative research
Typical methods	Large scale surveys conducted online, via telephone or face-to-face	One-to-one online, in-person or telephone depth interviews, and online or in-person focus groups	In-person deliberative workshops or online community activities
Strengths	Large sample sizes allow for statistically robust and representative overview of opinion. Can gauge the proportion of people who hold particular views – and measure how views change over time. Can analyse differences between subgroups.	Able to explore issues in depth with individuals or groups. Good for understanding why people hold viewpoints, and range of views held. Usually led by a professional researcher so can ensure content is understood.	Seek to understand how people respond to information and reach informed views on (potentially complex) topics about which they may know very little to begin with. Useful when there are complex trade-offs to be made, requiring information and time to consider the implications fully. Useful for understanding how customers apply their own values and priorities.
Weaknesses	Surveys must be kept quite short which limits number of questions and ability to inform participants about key information.	Explores participants' 'top-of-mind' or uninformed perspectives on a topic – i.e. their immediate reactions. Limited opportunity to inform customers about	The quality of output relies heavily on the balance and clarity of the information provided. Insights reflect customer views given the specific information provided in

	Not easy to understand rationale behind choices, or whether participants have understood the questions, limiting application for particularly complex or technical topics. Typically uses an online methodology that excludes people with no/limited internet access.	topic before asking their viewpoint. Takes time and can be expensive. Relatively small numbers of people involved means it's difficult to assess scale or strength of opinion. Focus groups can suffer from 'group think' where a consensus could be reached and individual opinions lost.	the sessions, so may not reflect the views of less-informed customers. Relatively small numbers of people involved mean it is difficult to assess scale or strength of opinion. Online community activities tend to gather individual feedback, avoiding 'group think'.

Research versus consultation

Research	Consultation
Participants are carefully selected using quotas. Views therefore reflect those of the wider customer base (either in a statistically robust way or more indicatively depending on method). Because participants are chosen by the research agency and numbers involved are relatively small most customers are excluded from the process.	Anyone can choose to participate and have their voice heard. Tends to be particularly motivated individuals who take part. Particularly true of those affected by decision making, whose views we would tend to seek out. Participants are self-selecting and so views expressed in a consultation may not be representative of wider customer base.
A transparent process but it is not publicised in the same way a consultation is, therefore not visible to all customers.	A highly visible public undertaking. A communications exercise that can help build awareness, understanding and support for proposals being consulted on.
Detailed questioning under relatively controlled conditions.	More limited questioning possible given time constraints. Participants are not given a monetary incentive in the same way research participants are. Format of responses tends not to be constrained.
Exploration of issues throughout the decision-making process, including at a very formative stage – not only in response to specific proposals.	We tend to ask for views on specific proposals.

Customer engagement community

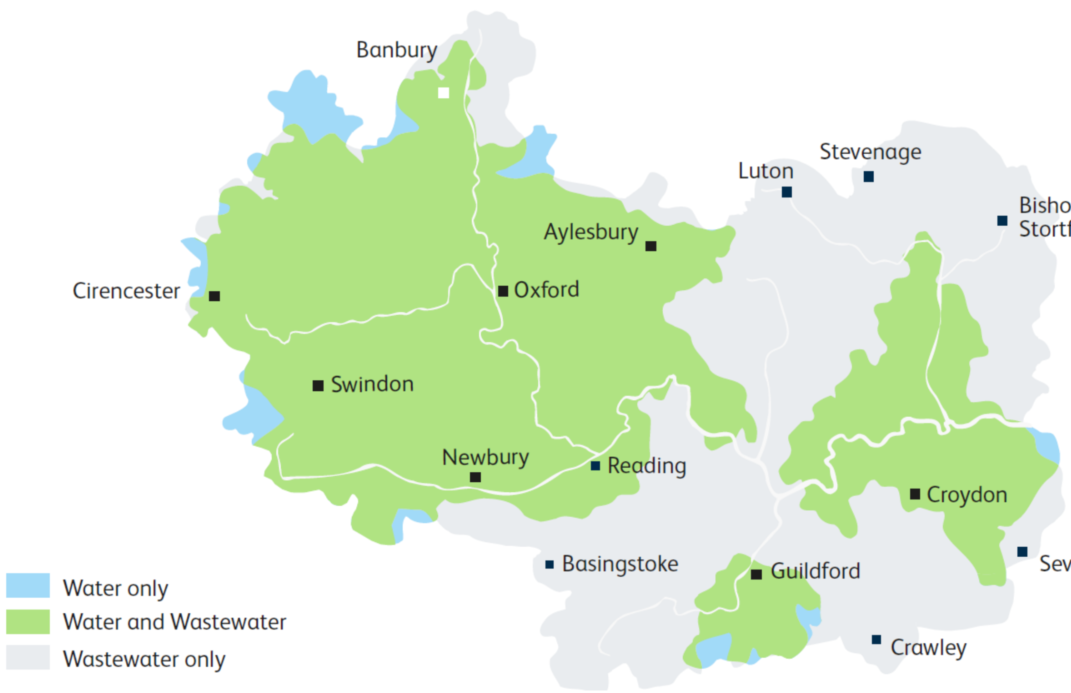
As well as the methods outlined above we also have the option to conduct research of all types among our customer research community. Since July 2021 this has been our Customer Voices panel, managed by our research partner Verve. Members of the panel are recruited to match household customer quotas (see sampling criteria). They are regularly invited to participate in various engagement activities, including basic polls and forums, online surveys, online community discussions and online focus groups. This is a relatively quick and cost-effective option to speak with customers.

There is an added benefit that some customers have partaken in several research studies and have become informed customers, who can comment on the development of our day-to-day and business and longer term plans. The panel is periodically 'topped up' though, allowing for uninformed customers to offer their feedback.

Definition of our coverage area

Our coverage area can be defined with postcodes. We provide our research/engagement suppliers with a list of our postcodes so that interviews/engagement takes place in the right areas. Our latest full postcode list ("2022 07 07 Thames Water Postcodes.xls") also shows the service status of each postcode (combined water and waste, wastewater-only, water-only, and if wastewater-only which company provides the water), local authority area, county council area, plus operational catchment area definitions (Water Resource Zones – WRZ, and Thames Regional Flood & Coastal Committee areas - TRFCC).

Map illustrating the coverage of Thames Water's water and wastewater services:



Setting quotas for quantitative customer surveys

It is not practical or economic to apply a large number of sampling criteria to the design of customer research. This is especially true for research among non-household customers, which can prove relatively challenging and expensive.

So, for our quantitative surveys we use the following approach, as this ensures we talk to a good cross section of customers, representing the main household and non-household characteristics:

	Household customers	Non-household customers
Sampling criteria	Age Gender Social economic group (SEG) Ethnicity Disability Water service provider Location (London, Thames Valley & Home Counties)	Industry sector Company size (number of employees) Location (Inner London; outer London; Thames Valley & Home Counties)
Analysis and profiling criteria (no quotas usually set)	Metered / unmeasured How bill paid Household income Household composition Whether on social tariff Whether on Priority Services Register	Water service provider Number of sites Use of water for business

If during a research study the research agency is unable to get sufficient responses in a particular customer segment, then the results are weighted to reflect our representative quotas.

There are exceptions where we diverge from sampling quotas, for instance research focusing on a specific topic or a specific service area relevant to certain groups of customers, e.g. water resources issues would exclude wastewater-only customers, and our PR24 Acceptability and Affordability quantitative research was conducted in just our combined water and wastewater area and our Affinity wastewater-only area.

For PR24 quantitative customer research conducted from 2023 (Enhancement cases, May 2023 and Acceptability and Affordability, September 2023) we've used Ofwat/CCW's guidance on the quantitative module of the Acceptability and Affordability research[90] recommending minimum sample sizes for water & sewerage companies of:

- 500 household customers, although realistically at least 1000 to ensure representation of our two main locations, London and Thames Valley & Home Counties
- 200 non-household customers

Sampling criteria for household customers

To ensure our surveys are representative of Thames Water household customers, we base sampling quotas for various demographic characteristics on the ONS Census neighbourhood level data[91], a well-trusted source.

[90] Guidance for water companies acceptability and affordability of PR24 business plans - CCW
[91] Source: https://www.ons.gov.uk/census (2011 and 2021)

Other household characteristics are based on Thames Water's own customer data, such as water/wastewater service provision[92], location[93] and metered status[94].

For PR24 we continued to use household quotas used for PR19, based on the 2011 Census. However, in February 2023 as new neighbourhood data became available from the 2021 census, we updated our quotas, including the non-Census derived quotas, to be used for our customer engagement from March 2023. The updated quotas include a split for the ethnicity quota into our dual London and Thames Valley & Home Counties Water Resource Zone areas and our wastewater-only area. This is because we found significant differences in ethnicity make-up across each area (and significant differences compared to the 2011 Census). Other characteristics were not broken down in this way as significant differences were not found across the service areas.

A slight amendment was made to the age quota in August 2023 to adjust the youngest age band to start from 18 instead of 16, to reflect Ofwat and CCW guidance and collaborative surveys.

Household customer survey sampling quotas/weights used before March 2023:

Age[91]	Quota	Socio-economic group (SEG) [91]	Quota
16 – 24	15%	AB	29%
25 – 34	21%	C1	33%
35 – 44	19%	C2	17%
45 – 54	17%	DE	21%
55 – 64	12%	Total	100%
65+	16%		
Total	100%		

Gender[91]	Quota	Ethnicity[91]	Quota
Male	49%	White	74%
Female	51%	BME	26%
Total	100%	Total	100%

Disability within household[91]	Quota	Metered vs unmeasured[92]	Quota
Yes	14%	Metered	40%
No	86%	Unmeasured	60%
Total	100%	Total	100%

Service provided[92]	Quota	Dual customers by water resource zone[93]	Quota	Wastewater-only customers by water company[94]	Quota
Combined water & wastewater	64%	London	78%	Affinity	60%
Wastewater-only	36%	Swindon/ Oxford	10%	Sutton & East Surrey	13%

[92] Source: Thames Water annual performance report (2015/16 and 2022/23) Note, water-only customers are not included in samples as they make up less than 1% of all household customers

[93] Source: WRMP19/WRMP24 section 3 reports, (water demand data from 2016/17 and 2019/20)

[94] Source: Thames Water customer data (2015/16 and 2022/23)

Total	100%	Slough/ Wycombe/ Aylesbury	6%	South East	16%
		Kennet Valley	4%	Essex & Suffolk	11%
		Guildford	2%	Total	100%
		Henley	0.3%		
		Total	100%		

Household customer survey sampling quotas/weights used from March 2023:

Age[91]	Quota	Socio-economic group (SEG)[91]	Quota
18 – 24	10%	AB	30%
25 – 34	20%	C1	33%
35 – 44	19%	C2	17%
45 – 54	17%	DE	20%
55 – 64	15%	Total	100%
65+	19%		
Total	100%		

Gender[91]	Quota	Ethnicity # [91]	Quota
Male	48%	London dual – White	55%
Female	52%	London dual – BME	45%
Total	100%	(Further breakdown of London dual BME, to be used where possible)	
		(London dual – Asian)	19%
		(London dual – Black)	14%
		(London dual – Mixed/other)	12%
		TV/HC dual – White	83%
		TV/HC dual – BME	17%
		Wastewater only – White	75%
		Wastewater only – BME	25%
		Total (for each)	100%

Disability within household[91]	Quota	Metered vs unmeasured[92]	Quota
Yes	27%	Metered	56%
No	73%	Unmeasured	44%
Total	100%	Total	100%

Service provided[92]	Quota	Dual customers by water resource zone[93]	Quota	Wastewater-only customers by water company[94]	Quota
Combined water & wastewater	64%	London	78%	Affinity	58%
Wastewater-only	36%	Swindon/ Oxford	10%	Sutton & East Surrey	12%

Total	100%	Slough/ Wycombe/ Aylesbury	5%	South East	17%
Location split for whole area[6]	Quota	Kennet Valley	4%	Essex & Suffolk	11%
London	60%	Guildford	2%	Southern	2%
Thames Valley & Home Counties	40%	Henley	0.5%	Total	100%
		Total	100%		

Location definitions are based on our Water Resource Zones, however the quotas are very similar if using the London Borough/non-London local authorities definition of the areas. TV/HC = Thames Valley & Home Counties.

Sampling criteria for non-household customers

To ensure our quantitative surveys are representative of Thames Water non-household customers we use the following profiles compiled by a leading supplier of business data, Dun & Bradstreet. The quotas are based on counts of businesses within the Thames Water region.

For PR24 we continued to use non-household quotas used for PR19, based on Dun and Bradstreet's 2017 data. However, in August 2023, we updated these quotas, using 2023 Dun and Bradstreet data, to be used for our customer engagement from August 2023.
In the updated quotas we expanded the company size quotas to reflect quotas and weights observed in non-household research conducted by Ofwat and CCW. To allow for rigorous sub-group analysis in non-household quantitative research, the smaller quotas for company size (50-249 and 250+ employees) could be over-sampled and then down-weighted within overall results.

In non-household research we seek to interview an employee that makes decisions about or pays the bill for the water/wastewater supply of their business.

In non-household research we also ask questions to ascertain what type of water user a business is, so we can represent those for whom water is major or essential part of running their business (e.g. food and drink production, certain agricultural and manufacturing services, cleaning and washing services) through to those who just use water at their premises for toilets and drinking water.

Non-household customer survey sampling quotas/weights used **before August 2023**:

Location	Quota	Company size	Quota
London	39%	0 – 9 employees	90%
Not London but inside M25	27%	10-249 employees	9%
Outside M25	33%	250+ employees	1%
Total	100%	Total	100%
Industry type (standard industrial classification)	Quota	Number of sites	Quota

Construction, manufacturing, agriculture	16%	Single site	94%
Wholesale, retail, transportation	14%	Multisite	6%
Accommodation, food services	7%	Total	100%
Services	48%		
Public organisations	9%		
Other services	7%		
Total	100%		

Non-household customer survey sampling quotas used <u>from August 2023</u>:

Location	Quota	Company size	Quota
London	61%	Sole trader: 0 employees	27%
Thames Valley & Home Counties	39%	Nano: 1-4 employees	37%
Total	100%	Micro: 5-9 employees	15%
		Small: 10-49 employees	16%
		Medium: 50-249 employees	4%
		Large: 250+ employees	1%
		Total	100%
Industry type (standard industrial classification)	**Quota**	**Number of sites**	**Quota**
Construction, manufacturing, agriculture (inc mining/quarrying, forestry/fishing)	15%	Single site	90%
Wholesale, retail, transportation (inc. motor repairs, storage)	20%	Multisite	10%
Accommodation, food services	6%	Total	100%
Services (inc. info/comms, finance/insurance, real estate, professional/scientific/technical and admin/support)	35%		
Public organisations (inc. public admin, defence, social security, education, health/social work)	12%		
Other services (inc. utilities, arts/entertainment/recreation, households as employees)	12%		
Total	100%		

Sampling criteria for qualitative and deliberative research

Qualitative and deliberative research approaches are not statistically representative in the same way quantitative surveys are. This type of research helps us understand the range of views and why customers hold them but not, for example, the proportion of customers who hold them.

As such, we tend not to set strict quotas for this strand of engagement but instead take advice from our research agencies on a case-by-case basis. At a minimum we include a mix of ages and SEGs, balanced between genders, and across a spread of locations, including London and Thames Valley & Home Counties.

For PR24 customer research conducted from 2023 we've used Ofwat/CCW's guidance on the qualitative module of the Acceptability and Affordability research[2] recommending sample sizes for water & sewerage companies of:

- 48 household bill payers
- 8 future household customers
- 8 low income/social tariff household customers
- 8 household customers with health vulnerabilities/on or eligible for the Priority Services Register
- 16 micro sized (less than 10 employees) non household customers
- 8 small-large (10 or more than employees) non household customers

Sampling under-represented customers and customers in vulnerable circumstances

We know from experience that there are groups whose views may not be captured through traditional sampling methodologies. Therefore our sampling strategy allows us to ensure we include all customer groups that are relevant for each piece of research and that we use appropriate methods to engage each of these groups.

This approach ensures our research is inclusive and we solicit feedback from all types of customers (including what might be termed a 'silent majority'), not just those who express their opinions proactively, for example via social media and complaints channels, or through community groups and elected representatives.

We believe the following groups may need a different approach to sampling, research methodology or research materials:

Under-represented customers:

- Customers from particular faith /cultural/ ethnic groups
- Customers with no English or English as a second language
- Future bill payers in the 18-24 and 25-30 age groups that are not currently responsible for paying bills
- Socially isolated customers, including the elderly and those who don't have access to or don't use the internet

Customers in vulnerable circumstances:

- Customers with learning disabilities

- Customers with mental health issues
- Customers with physical/mobility disabilities
- Customers with hearing disabilities
- Customers with visual disabilities
- Customers with higher water usage due to specific medical needs
- Customers on low incomes or in debt
- Customers struggling or at risk of struggling to pay bills
- Customers with other distinct needs
- Customers affected by specific or repeat incidents e.g. flooding, no water, odour
- Customers with higher water usage due to large family, large house or garden

For each piece of research we consider whether we need to engage with any of these specific groups in a different way to the standard representative survey, taking into account:

- Whether any customer groups are particularly or disproportionately affected by the topic, proposals or plans, whether by location, demographic or circumstance
- The relevance of the topic to all customer groups
- The timescales of the topic, proposals or plans being discussed, e.g. we included future bill payers in any research into long term delivery strategies

Documenting our engagement

To ensure our research and engagement with customers, communities and stakeholders is recorded, shared and acted upon, it is important that all activities are documented in a robust and consistent manner. For each engagement activity, the following must be recorded, as a minimum in a research summary:

- A summary of the engagement activity, including purpose, a breakdown of attendees/participants, the format/methodology of the engagement and the dates it was conducted
- A summary of the insights gathered.

Where a third party has conducted the engagement this would be part of their reporting outputs, but for internally managed engagement the following template should be used:

Research summary form

Title of engagement activity	
Supplier	Thames Water
Fieldwork completed	From month/year to month/year
Aim of the research	To understand…
Demographics	Who was engaged with?
Research approach (Method)	How was the engagement conducted?
What did the research tell us that was new?	
What did we already know that the research validated?	
Did the research contradict any other findings?	

8.2. PR24 triangulation and line of sight methodology, August 2023

Thames Water

PR24 Triangulation and Line of Sight methodology

August 2023

1

Purpose of this document

In this document we explain our approach to:

- Triangulating and evaluating customer, community and stakeholder insights from different sources
- Balancing these insights with other planning considerations and constraints
- Demonstrating “line of sight” in our PR24 plan by documenting how insights inform our proposals
- Dealing with insights tensions

Evolution of this document

The purpose of the original version of this document produced in February 2022 has not changed from the above, nor has our overall approach to triangulation and line of sight. However, some elements of this document have been updated to reflect changes in the wider PR24 programme. For example:

- Changes have been made to the structure and groupings of customer wants in WCCSW, which have been reflected in both August 2022 and August 2023 updates of this document.
- We have also, on an ongoing basis, updated the insights included in the framework with new key sources which have been reviewed as part of the PR24 programme.
- As part of the August 2022 update, we improved and updated the proposed content and structure for our LOS documents.

2

Triangulation and Line of Sight framework for PR24 Plan

To demonstrate how customer, community and stakeholder insights lead to action, we will create supporting documents detailing how engagement has shaped key proposals in our PR24 business plan.

Insights → What customers, communities and stakeholders want (WCCSW) → Engagement summary (ES) → Line of Sight (LOS) → Internal and external validation → PR24 Plan

WCCSW document synthesises insight from a range of sources and breaks these down into key insights by segment and regions (where possible).

ES details the engagement per area (where insights have been drawn from) and how different sources have been triangulated to develop key insights.

LOS explains how key insights have informed our proposals. This includes demonstrating how insights have informed our base plan, enhancement areas and performance commitments*.

LOS submitted to regular **CCG** scrutiny and challenge. Transparent and iterative process to refine proposals and inform further engagement.

Line of Sight sections will be created for the following Plan areas:

1. Overall plan (including LTDS)
2. Water
3. Wastewater
4. Customer

* In addition to demonstrating how insights have informed proposals, the LOS will document where key decisions and trade-offs have been made based on customer, community and stakeholder insights versus other factors. Other factors include: long term strategy, regulation, performance, risk, deliverability and affordability.

3

Why we need to demonstrate line of sight

Triangulation and line of sight for our PR24 business plan

What happened at PR19

- At PR19, we conducted extensive customer research to support our PR19 business plan and Ofwat recognised examples of high quality. However, reflecting on lessons learned concluded that the process of Triangulation was not transparent, and that insight was not always well reflected in the plan.
- Ofwat struggled to see the line of sight between customer wants, investment priorities and plan outcomes.

What's important for PR24

- Ofwat will likely assess our engagement evidence and line of sight again in their IAP tests for PR24. If we don't demonstrate comprehensive line of sight, we risk failing Ofwat's engagement test in this area.
- For the engagement IAP test (or whatever replaces it), we will need to demonstrate we are listening to our customers and stakeholders and acting on what they say on a continual basis.

What we are doing about it

- For PR24, we have taken steps to improve in this area by putting in place the right governance processes and reporting structures, backed up by appropriate assurance arrangements.
- **Comprehensive evidence and line of sight doesn't mean exhaustive**, we need to ensure the way we demonstrate the thread from customer and stakeholder evidence to our proposals is **strategic and concise.**

4

Insights included in our framework

We have made use of a wide range of inputs, that go beyond solely engagement insights. We have used over 300 insight sources, including PR24-specific research, research from PR19, ongoing BAU insight gathering and insight from relevant external sources. These insights have different objectives and inform our planning in different ways.

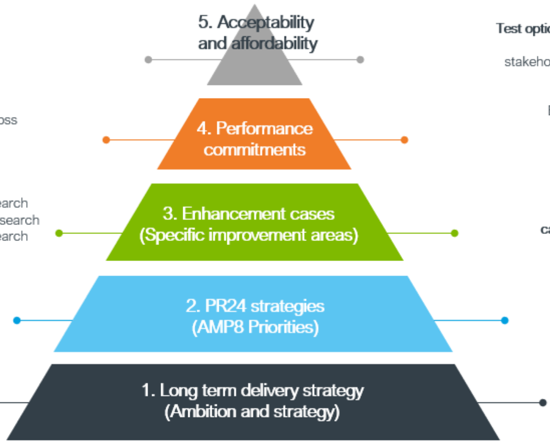
Key insight sources

- Acceptability & affordability testing
- 'Your water, your say' open challenge session
- LTDS research
- Ofwat / CCW collaborative research across companies (PC priorities and valuations research)

- PR24 Phase 1 Enhancement Areas research
- PR24 Enhancement package options research
- PR24 Phase 2 Enhancement Areas research

- Ongoing BAU insights (building on the What Customers Want v14 document)
- PR24 Foundation research
- Vulnerability deep dive research
- Future bill payers context research

- Vision 2050 & public value engagement
- Strategic framework research (incl. WRSE, WRMP, DWMP)



Objective of insight

Test options for overall draft plan with customers and stakeholders. Opportunity for customers & stakeholders to challenge and inform the balance of our final plan.

Ensure regulatory incentive rates **and the PC targets we set** are informed by customers willingness to pay for key service measure improvements

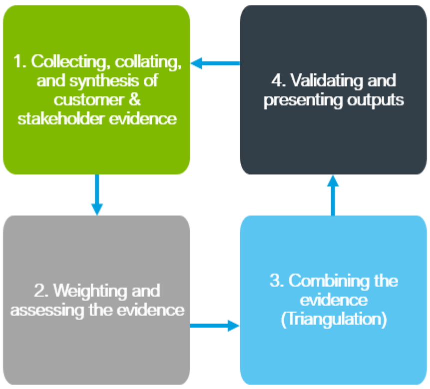
Test customer, community and stakeholder **priorities for PR24 potential enhancement cases** to inform our overall package as well as how we deliver the specific proposals (Need and Solutions)

Determine customer, community and stakeholder wants and **priorities** for AMP8 across each service area. **Establish the key outcomes they want us to deliver.**

Use customer, community, stakeholder insights to inform **level of ambition and long term strategy** (incl. phasing of key investments)

5

What is Triangulation?



Triangulation in the water sector is the means of using multiple independent measures to examine a hypothesis or conclusion being investigated which demonstrably avoids confirmation bias and maximises the validity of the decisions being made.

The broad overarching principles of effective triangulation include: strategic planning, research expertise and understanding, proportionality to investment decisions, and transparency.

To utilise the maximum potential of evidence sources and validate findings effectively, triangulation needs to be an ongoing and iterative process that occurs throughout the key stages in business plan development.

Lastly, the evidence of triangulation needs to be presented in a manner that clearly demonstrates the Line of Sight between customer & stakeholder evidence and final strategies & commitment levels.

For PR24 business plans, Ofwat expects companies to develop a robust approach to Triangulating the insights from different sources and to demonstrate a clear Line of Sight linking engagement to proposals (and document trade offs).

6

What does good look like for PR24?

CCW has outlined the following criteria for what good triangulation should look like at PR24. These core principles act as a minimum benchmark for companies but avoid prescribing specific methods. Companies should be able to innovate further beyond these.

Engagement and triangulation should be an ongoing process.

Designed to show how customer opinion has evolved over time and how it impacts decisions. A designed approach will consist of specific phases for triangulation with prescribed outcomes and research questions at each stage.

Balanced decisions should be at the core of triangulation.
Where information is gathered to identify new research areas or where feedback agrees, triangulation plays a limited role. Triangulation process starts by identifying the conflicting points within the body of evidence where balances between values and opinions need to be made and transparently showing the resulting decisions.

Triangulation should make use of a wide range of inputs, and these should not be solely engagement insight.

The quality and breadth of data used to drive triangulation help to determine the robustness and transparency of the process.

Validation of findings should make use of a wide range of datasets.
Validation findings are made more robust and transparent through comparison with a range of quantitative and qualitative data. Comparison with findings from other sectors further lends robustness to outcomes.

Triangulation should be informed by a transparent and consistent weighting framework.

A transparent and consistent process to the weighting of disparate insight streams provides a robust process and enables transparency.

Companies should seek independent assurance of their process and outcomes.

This should cover assurance of the whole triangulation process. It should also assure and review the outcomes generated.

7

What customers, communities and stakeholders want (WCCSW)

8

Purpose of What Customers, Communities and Stakeholders Want

To ensure our plans deliver what customers, communities and stakeholders want, we periodically consolidate what we know about their needs and expectations in our What Customers, Communities and Stakeholders Want (WCCSW) document.

It provides a consistent and robust evidence base on which to base our decision making.

Insights →

What customers, communities and stakeholders want (WCCSW)
WCCSW document synthesises insight from a range of sources and breaks these down into key insights by segment and regions (where possible).

Engagement summary (ES)
ES details the engagement per area (where insights have been drawn from) and how different sources have been triangulated to develop key insights.

Line of Sight (LOS)
LOS explains how key insights have informed our proposals. This includes demonstrating how insights have informed our base plan, enhancement areas and performance commitments*.

Internal and external validation
LOS submitted to regular **CCG** scrutiny and challenge. Transparent and iterative process to refine proposals and inform further engagement.

→ PR24 Plan

As we develop our plan, undertake further engagement and gather additional insights, we will iteratively update and improve WCCSW.

9

Navigating this document – structure

WCCSW v18 is divided into 5 parts:

1. Summary of Insights

Overview of what customers, communities and stakeholders want:

- 3 key Pillars
- 10 Wants supported by 20 Topics

Summary of key areas of insight tension between customers, communities and stakeholders

Charts with **customer prioritisation** of key Wants and service improvements

Summary of insights for **key customer segments**

2. Insights per area

For Customers: 5 overarching Wants, 11 topics and 6 enhancement case insights

For Communities: 1 overarching Want and 3 Topics

For the Environment: 4 overarching Wants and 6 topics

3. Demographic Insights

Summary of divergence of views and priorities on different topics between different demographic groups:

- Age
- Gender
- Ethnicity
- Disability within household
- Region (areas within Thames Water's region)

4. Segment Insights

Where customer and stakeholder segment insights differ from key Wants or Priorities, or insights are specific to a segment, these are included in this section for the following groups:

- Stakeholders and Communities
- Vulnerable customers (including digitally excluded and non-native English speakers)
- Non-household / business customers
- Retailers
- Developers
- Future bill payers

5. Appendices

List of Insight sources reviewed

Charts with **customer prioritisation** of key Wants and service improvements

Summarised insights from PR24 enhancement package options research

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Wants

What customers, communities and stakeholders want

The current view of what customers, communities and stakeholders want can be broken down into 10 Wants.

Delivering life's essential service so our Customers, Communities and the Environment can thrive

For Customers	For Communities	For the Environment
CS1. I want an easy customer experience and tailored support AF1. I want fair and affordable bills WT1. I want safe, high quality drinking water WT2. I want a reliable supply with minimal disruption WS1. I want you to prevent sewer flooding and take waste away safely	CI1. I want you to have a positive impact on the community	ENV1. I want you to reduce your impact and restore the environment WT3. I want you to fix leaks and ensure there is enough water now and in the future WS2. I want you to stop polluting rivers and to improve their quality WS3. I want you to reduce emissions and reach net zero

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Engagement Summaries

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Purpose of the Engagement Summary

The purpose of the Engagement Summary (ES) is to provide an overview of the customer and stakeholder engagement undertaken for each core area of the PR24 business plan (Water, Wastewater, Customer Service).

It sits between the business wide 'What Customers, Communities and Stakeholders Want' (WCCSW) and the planning area Line of Sight (LOS) documents.

Insights → What customers, communities and stakeholders want (WCCSW) → Engagement summary (ES) → Line of Sight (LOS) → Internal and external validation → PR24 Plan

WCCSW document synthesises insight from a range of sources and breaks these down into key insights by segment and regions (where possible).

ES details the engagement per area (where insights have been drawn from) and how different sources have been triangulated to develop key insights.

LOS explains how key insights have informed our proposals. This includes demonstrating how insights have informed our base plan, enhancement areas and performance commitments*.

LOS submitted to regular **CCG** scrutiny and challenge. Transparent and iterative process to refine proposals and inform further engagement.

As further engagement is undertaken and additional insights are gathered to inform the PR24 plan, the ES will be refreshed alongside each iteration of 'What Customers, Communities and Stakeholders Want'.

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Key components of each Engagement Summary

The Engagement Summaries will be split into three main parts:

1. Key insights*

- Summary of the key insights (Wants and topics) to inform our Water strategy from customer, community and stakeholder engagement and the key sources of engagement used
- The key insights will come from the evidence in WCCSW and will each have a unique ID.
- These key insights will be used in the LOS documents to link customer and stakeholder evidence to proposals

2. Insight Triangulation

- In this section of the ES we provide further detail / context on each key insight including an assessment of the robustness of evidence and a summary of any divergent views.
- This is intended to supplement the detailed insights in What Customers, Communities and Stakeholders Want and provides planning leads with further detail on triangulation to assist decisions and documentation in LOS sections across the plan.

3. Key sources and weighting

- In this section we provide an overview of the evidence scoring system based on 'The Magenta Book' – guidance for qualitative evaluation by the UK Government and the robustness / weighting scores for each source.
- This is intended to provide the reader with a clear view of the robustness of the relevant insight sources used for each core area of the plan and weighting applied to each source in the insights synthesis.

*For Customer Service, we will also provide a view of insights by key segment (Household, NHH, developers etc.)

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Approach to weighting evidence sources

Each insight source has been assessed using a scoring system based on HM Treasury Magenta Book Guidance. This has then been used to inform our synthesised evidence base in What Customers, Communities and Stakeholders Want.

Approach

Each source is scored using 3 categories for evaluation of engagement sources are:

- **Methodologically sound**
- **Rigorously gathered**
- **Credibly interpreted**
- **A 'contributory score'** is also given to each insight, from each event, to evaluate its relevance to a certain topic.

Insights are then combined from these sources in WCCSW, those with higher scores are given more weight in the evidence synthesis process and the associated insight summaries and prioritisation rankings.

We document this process and provide detail of how different sources have been used to inform key areas of the plan in our Engagement Summary (ES) documents. These summaries provide an overview of the engagement undertaken for each core area of the business plan (Water, Wastewater, Customer), where insights have been drawn from and how different sources have been triangulated to develop key insights and any tensions that exist between them.

Triangulated outputs

Triangulated ranking of what customer priorities and outcomes

Supported by detailed insight summaries for each Want

Triangulated ranking of areas for improvement (enhancement cases)

Supported by detailed insight summaries for each potential enhancement area

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Approach to weighting evidence sources (1/2)

Sia Partners has developed an evidence scoring system, based on 'The Magenta Book' – guidance for qualitative evaluation by HM Treasury

- The 3 categories for evaluation of engagement sources are:
  - **Methodologically sound**
  - **Rigorously gathered**
  - **Credibly interpreted**
- **A 'contributory score'** is also given to each insight, from each event, to evaluate its relevance to a certain topic (planning area).
- These categories for engagement events are scored according to their requirements, then an average score is established for each source. An outline of each category's scoring requirements is in the table below.

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and extensive detail of feedback.	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

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Approach to weighting evidence sources (2/2)

Key insights should be drawn from sources with the highest overall score for the specific topics covered

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and extensive detail of feedback.	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

Quality indicators	Description	Questions
Contributary evidence	Contributory in advancing wider knowledge or understanding about the topic	**How closely linked is the feedback to the specific output being evidenced?** • Is the information valuable for business planning purposes? • Does this information confirm what I already know about my customers? • If no what explains the discrepancy? • If no, does it give me an alternative perspective? • If yes, how should I adapt my analysis of customer preferences? • Does the evidence support claims for wider inference?
Methodologically sound	Defensible in design by providing a research strategy that can address the evaluation question posed	**How well was the engagement/research conducted compared to best practice principles?** • What sorts of questions does this method answer? • Are any of the methods applied less well established, new or innovative? If yes do I need to establish how sounds these methods are? • Has the methodology been appropriately adapted and refined for the specific purpose for which it has been used? • Is it clear that good practice is followed?
Rigorous data collection	Rigorous in conduct through systematic and transparent collection, analysis and interpretation of qualitative data	**Did the engagement work with significant volume? Was the evidence captured effectively?** • How was data gathered? • Were best practice methods applied for gathering the data • Is the collected data detail rich and in-depth?
Credible analysis and interpretation	Credible in claim through offering well-founded and plausible arguments about significance of the evidence generated	**How credibly/independently was the evidence evaluated? How does the interpretation ensure the avoidance of bias?** ▪ Was the context of the engagement provided? ▪ Are there biases to be aware of which may not have been mitigated by the methodology? ▪ Does the evidence provide multiple perspectives and alternative positions?

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Approach to triangulating priorities

We have applied the following principles when triangulating relative priority rankings of Wants and Enhancements

Source mapping

We reviewed the results of ranking exercises in several engagement sources and mapped them to Thames Water's customer Wants in the insights database. We also reviewed the Ofwat collaborative priorities research as an additional source, noting that only a small sample of Thames Water's customers were included in this research.

Key sources: PR24-1 PR24 Foundational Research; R15 Ofwat Collaborative Research; SP12 Vision 2050 Research

Weighting and assessing

Insight Source: For each source, we first assessed the robustness of the Insight Source using the Magenta Book criteria. This provides a weighting based on the quality of the research itself on a scale of 1-3.

Contributory score: Certain Wants / Outcome have been tested directly in research, which provider greater confidence in the accuracy of the priority ranking applied to them. Across sources, we categorised topic tested as 'Direct' or 'Indirect' aligned to the mapped Want / Outcome. Using this approach, we applied a 'contributory score' which provided a weighting based on the relevance of the research to a specific topic.

Key insight sources	Insight source scoring		
	Methodologically Sound	Rigorously gathered	Credibly interpreted
PR24-1 PR24 Foundational Research	1.3	1	3
R15 Ofwat Collaborative Research	2.3	2	3
SP12 Vision 2050 Research	2.8	3	3

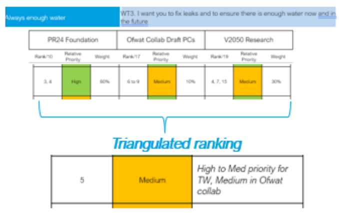
Combining the evidence

Priority grouping: We recorded the prioritised ranking placed by customers and first grouped scores into 'High', 'Med' or 'Low' to allow for a normalisation across sources where a different number of priorities were tested. This enabled us to develop a combined view of relative priority grouping for each topic.

Relative priorities: We then triangulated priority rankings by reviewing the relative priority ranking across sources within the 'High', 'Med', 'Low' grouping, considering the combined weight of the insight source score and the contributory score. This enabled us to either slightly increase or decrease the weighting in areas where average rankings were close or in the same category.

As a final step, we also drew upon relevant qualitative insight in WCCSW. This was used to inform the final overall ranking in instances where the relative priority rankings were finely balanced.

See next slide



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Worked example – triangulation of priorities

Customer Outcomes	Customer Wants	Rank	Relative Priority	Comment	PR24 Foundation			Ofwat Collab			V2050 Research		
					Rank/10	Relative Priority	Weight	Rank/17	Relative Priority	Weight	Rank/19	Relative Priority	Weight
Safe and clean water	WT1. I want safe, high quality drinking water	1	High	*Highest priority across all sources*	1	High	60%	1 to 5	High	10%	1	High	30%
Reliable supply	WT2. I want a reliable supply with minimal disruption	3	High	*High priority across all sources*	1	High	60%	1 to 5	High	10%	6	High	30%
Always enough water	WT3. I want you to fix leaks and to ensure there is enough water now and in the future	5	Medium	*High to Med priority for TW, Medium in Ofwat collab*	3, 4	High	60%	6 to 9	Medium	10%	4, 7, 15	Medium	30%
Take wastewater away safely	WS1. I want you to prevent sewer flooding and take waste away safely	4	Medium	*Sewer flooding higher priority for V2050 and Ofwat collab, Med for TW*	6	Medium	60%	1 to 5	High	10%	3	High	30%
Cleaner rivers	WS2. I want you to stop polluting rivers and to improve their quality	6	Medium	*Medium priority across sources, Direct testing in PR24 foundation only*	7	Medium	70%	6 to 9	Medium	10%	9	Medium	20%
Green energy	WS3. I want you to reduce emissions and reach net zero	8	Low	*Indirect testing in several sources, generally med to low priority*	7	Medium	50%	10 to 17	Low	20%	13,14	Low	30%
Good service for all	CS1. I want an easy customer experience and tailored support	9	Low	*Important to customers but low relative to other areas*	5, 9	Medium	60%	10 to 17	Low	10%	10,12,17	Low	30%
Fair and affordable	AF1. I want fair and affordable bills	2	High	*High priority across all sources tested, 2nd highest in PR24 Foundation*	2	High	65%				5	High	35%
Thriving environment	ENV1. I want you to reduce your impact and restore the environment	7	Medium	*Medium priority across sources*	7	Medium	80%	6 to 9	Medium	20%			
Part of your community	CI1. I want you to have a positive impact on the community	10	Low	*Generally lowest priority across source, customers prioritise core service first*	10	Low	65%				18,19	Low	35%

We have applied the same approach to prioritising rankings of our enhancement cases.

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Worked example – synthesising insight by Want (1/2)

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and extensive detail of feedback.	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

We have mapped each source to topics and assigned a '**Contributory score**' based on the focus of that source on each topic.

Source e.g. *PR24-12 PR24 Options research*	**Water**						
	Safe and clean water	**Reliable supply**		**Always enough water**			
	Water Quality	Water supply interruptions	Water network resilience	Water resources	Water demand management	Sustainable abstraction	Leakage
Does the source cover this topic?	Y	Y	Y	N	N	N	Y
Contributory score	3	3	3				3

e.g. For some, the impact (of replacing trunk mains) feels narrow and unfair, with potentially limited benefit (i.e. those in London and with basements whom some presume are therefore more 'wealthy')."

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Worked example – synthesising insight by Want (2/2)

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and extensive detail of feedback.	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

We have assigned a '**robustness score**' based on these criteria to each source as an assessment of the quality of the research / engagement undertaken

Source	Methodologically sound				Rigorously gathered		Credibly interpreted
	Sample	Segments	Regional coverage	Method of engagement	Recording respondents	Recording structure	
PR24-12 PR24 Options Research	3	2	2	2	3	3	3

Sources, as well as the evidence they contain, which score highly in both assessments will have a greater weight when informing the key insight on each topic, and thus we can be confident in the robustness of the evidence base for each topic.

e.g. "For some, the impact (of replacing trunk mains) feels narrow and unfair, with potentially limited benefit (i.e. those in London and with basements whom some presume are therefore more 'wealthy')."

Engagement robustness score (above)	2.8	Contributory score (previous slide)	3

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Line of Sight

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Purpose of the Line of Sight

The overarching objective of our PR24 business plan triangulation process is to come to reasoned decisions about proposals based on customer and stakeholder insight alongside other factors and constraints. This link from insights to proposals needs to be clearly demonstrated in the Line of Sight (LOS) documents.

Insights → What customers, communities and stakeholders want (WCCSW) → Engagement summary (ES) → Line of Sight (LOS) → Internal and external validation → PR24 Plan

WCCSW document synthesises insight from a range of sources and breaks these down into key insights by segment and regions (where possible).

ES details the engagement per area (where insights have been drawn from) and how different sources have been triangulated to develop key insights.

LOS explains how key insights have informed our proposals. This includes demonstrating how insights have informed our base plan, enhancement areas and performance commitments*.

LOS submitted to regular **CCG** scrutiny and challenge. Transparent and iterative process to refine proposals and inform further engagement.

The sections need to be authored in a way that helps the reader understand the way we have chosen our proposals and the rationale behind these decisions, in particular, in relation to customer and stakeholder feedback.

* In addition to demonstrating how insights have informed proposals, the LOS will document where key decisions and trade-offs have been made based on customer, community and stakeholder insights versus other factors. Other factors include: long term strategy, regulation, performance, risk, deliverability and affordability.

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Triangulation and Line of Sight process

The overarching objective of Business Plan Triangulation is to come to reasoned decisions about proposals based on customer and stakeholder insight alongside other factors and constraints.

What customers, communities and stakeholders want (WCCSW)

Engagement summary (ES)

→ BP Triangulation →

Other factors including long term strategy, regulation, performance, risk, deliverability and affordability

Top Down Triangulation

PR24 Programme Board level input to review material areas where:

- Insights are contradictory or finely balanced and trade offs are required
- Views of customers and stakeholders challenge the emerging business plan proposals
- Customers and stakeholders views challenge Ofwat's PR24 framework

Top-down triangulation involves:

- Formal planned triangulation meetings
- Discussions at PR24 Board level informed by CCG input
- Approval of overarching BP proposals

Line of Sight (LOS)

Planning leads review a range of insights and make balanced judgment on the findings to inform decisions throughout the Business Plan development process, including:

- Developing and refining Business Plan proposals
- Documenting trade offs and rationale for decisions in the LOS document
- Shaping further engagement requirements

Bottom Up Triangulation

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Example LOS structure and content overview

Customer Outcome	Area	Customer Wants and Expectations	What we are going to do in AMP8	Rationale	How we will measure success
• *Customer Outcomes*	*Sub topics / areas within the LOS* *e.g. Customer LOS will be divided into 5 sections* *1. Customer service (Retail and Ops)* *2. FCC & Billing* *3. Vulnerability* *4. Developer services* *5. Non-household/ Retailers*	• *Summary of Wants and Expectations, including detail of detailed insights specific to the topic area (summarised from WCCSW and Engagement Summaries)*	• *What are the 3-4 key things we are proposing to deliver for each area in AMP8*	*Explain why are we doing it and how you came to your proposals:* *1. How it delivers on customer expectations and what the benefits are* *2. How other constraints / evidence has informed your proposals [e.g. past performance, long term delivery strategy, funding, regulatory]* *3. If proposals have had to go against WCCSW for AMP8, document your rationale for the decision (e.g. if certain things need to be pushed to AMP9-10)*	• PCs and KPIs

Line of Sight documents will be created for the following Plan areas:

1. Overall plan (including LTDS) | 2. Water | 3. Wastewater | 4. Customer

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Approach to dealing with insight tensions

Approach to dealing with insight tensions

A key part of a robust triangulation framework is identifying conflicting evidence and dealing with it in a transparent and systematic way. In its guidance for best practice triangulation for PR24, CCW encourages companies to help Ofwat and CCGs by highlighting where trade-offs exist, where disagreement lies, and why certain solutions were chosen over others.

We have used the following approach to deal with insights tensions as part of the wider triangulation and line of sight framework:

Synthesise evidence → **Identify tensions** → **Assess materiality** → **Document decision**

Synthesise evidence

Establish synthesised view of customers and stakeholders using insights triangulation framework across BAU insights, PR24 engagement and strategic planning engagement.

Segment customers and stakeholder views in the Insight data base to enable clear sight of potential tensions between groups or regions.

We have synthesised evidence as part an iterative process through our What Customers, Communities and Stakeholders Want.

Identify tensions

Identify whether there are any divergent views between customer segments (e.g. NHH vs HH) and/or stakeholder groups or regions across the sources.

Highlight these on a case by case basis in WCCSW and Engagement summaries.

We have analysed segmented insight from customers and stakeholders across all topics and highlighted any divergence in views.

Assess materiality

Assess the materiality of the insight tension in terms of potential impact on the plan and potential impact on the specific group (if chosen approach goes against preferences).

Material tensions should also be surfaced to CCG with their input gathered as part of the process.

Determine whether further customer testing is required based on the potential risk to group(s) who may be adversely impacted.

Document decision

Planning leads and leadership to review key insight tensions as part of the wider prioritisation framework being used to inform investment decisions.

If decisions need to be taken that disproportionately impact a specific group or region, transparently document the rationale for the decision taken and why the business felt this was most appropriate given the constraints.

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Identifying tensions

A key role of triangulation is to identify tensions and divergence of views amongst customers, whether this is across customer type (household, non-household, vulnerable etc) or region. Through the triangulation and synthesis process, we have been able to identify differences across Thames Water's customer base.

For each key topic, we have provided an indication of the level of difference in views for customer segment ('Divergence of views') and for regions ('Regional differences') according to the criteria below:

	Divergence of views	Regional differences
Low	Little to no differences between views of customer segments	Little to no differences between views of customers in varying regions of the customer base
Med	Some or sporadic differences between views of customer segments	Some or sporadic differences between views of customer segments
High	Clear and significant differences between views of customer segments	Clear and significant differences between views of customers in varying regions of the customer base

These indicators provide a quick indication of the level of divergence of views on a given topic and as such, do not have any implication on the robustness or strength of evidence behind it (i.e. do not impact any triangulation weighting).

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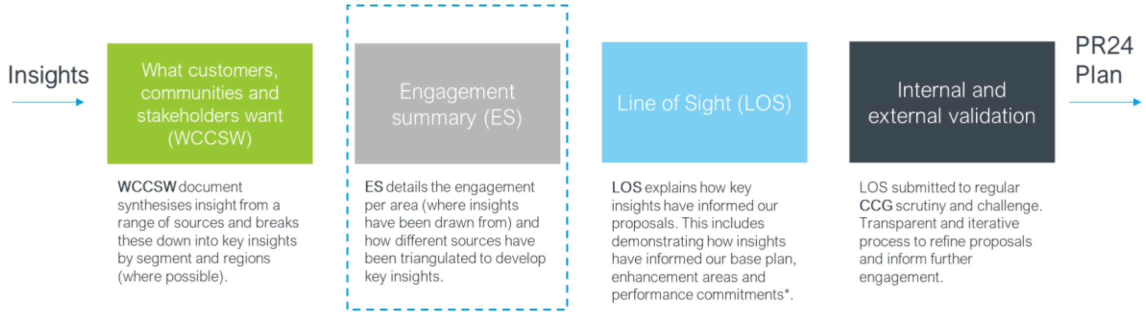
8.3. Engagement Summaries, September 2023

Customer Service Engagement Summary

Purpose

The purpose of the Engagement Summary (ES) is to provide an overview of the customer, community and stakeholder engagement undertaken for each core strategy area of the PR24 business plan (water, wastewater and customer service).

It is intended to sit between the programme wide 'What Customers, Communities and Stakeholders Want' (WCCSW) and the Line of Sight (LOS) sections in various documents across the business plan.



It sets out the details of the key insights derived from the PR24 engagement programme and how different sources have been triangulated to inform these.

This aims to provide a clear and transparent view of the robustness of engagement evidence linked to each topic, any tensions in views and how these have been addressed.

This document serves as the Engagement Summary for Customer Service. It is comprised of three main parts:

- Key insights to inform our Customer service strategy from customer, community and stakeholder engagement and the key sources of engagement used
- Triangulations of Insights - documentation of the robustness of evidence supporting each key insight and any tensions or divergence in views between groups or regions
- List of sources and triangulation robustness / weighting scores

Key insights used to inform our Customer Service strategy

This section provides a summary of the key insight sources we have drawn upon in our engagement for Customer Service. This includes our previous insight sources from PR19, ongoing customer insight and community/stakeholder engagement activities, our strategic long-term plans and our PR24 Business Plan targeted engagement.

The table below summarises the key insights for Customer Service that we have drawn from What Customers, Communities and Stakeholders Want (v18.3) and the engagement summary that follows. This includes a list of key sources used to derive each key insight. The full list of sources used is then included, listing sources and triangulation robustness / weighting scores.

ID	Key Customer Topics	Key Sources
CS1	**For Customers /** I want an easy customer experience and tailored support	
Customer experience		CX1-CX14, CX18-CX24, CX32-CX33, CX36, CX45, CX61-CX62, CX66-67, CX71, CX73, CX76-81, CX88-89, CX96-97, CX100, CX105, CX109, CX111, CX113, CX120, CX121, CX124, CX126 PR19-10 PR24-2, PR24-3 R10, R15, R39, R40 S14, S38, S39 SP6, SP12, SP14
Billing		CX35, CX42, CX46, CX55, CX113, CX126

Vulnerable customer support	CX27, CX38, CX40, CX69, CX84, CX90, CX91, CX100, CX113, CX119, CX126 PR19-46, PR19-63, PR19-65 PR24-1, PR24-2, PR24-14 S14, S26, S39

ID	Key Customer Topics	Key Sources
AF1	**For Customers /** I want fair and affordable bills	
Affordability		CX24, CX27, CX42, CX55, CX62, CX69, CX82, CX89, CX110, CX113, CX114, CX119, CX120, CX122, CX126, PR19-4, PR19-21, PR19-22, PR19-23 PR24-2, PR24-12, PR24-14, PR24-17 R14, R16, R17, R36, R40, R53 S26, S39 SP8, SP12, SP15, SP17
Social tariffs		CX40, CX69, CX82, CX84, CX100, CX113, CX119, CX126, CX128 PR19-21 R17, R36, R53 S8 SP12

Triangulation of insights for Customer Service

In this section we provide further detail on each key insight including an assessment of the robustness of evidence and a summary of any divergent views. A further assessment of source robustness is then provided.

CS1. I want an easy customer experience and tailored support

/ Customer experience

Summary

Customers want us to be easy to contact, via their preferred channel and to have their queries solved on first contact by knowledgeable staff. If this is not possible, they expect to be provided with the requested information and not have to chase us repeatedly for an answer.

When things go wrong with our water or wastewater service, customers want us to be proactive in both addressing the issue as well as communicating progress and timescales, from when Thames Water are aware of the issue, through to resolution. For serious incidents, such as sewer flooding, customers expect to be taken seriously and reassured that Thames Water are working to fix the issue as quickly as possible.

We should also make provisions to ensure that our customer service and information we provide is accessible to all and tailored to the individual needs of different customer types, particularly those in vulnerable situations. Customers expect us to be aware of and empathetic to their situation and respond accordingly in a friendly manner.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

Customers and stakeholders are in agreement that providing a quality customer experience and understanding and resolving customer issues efficiently is of high importance. It is also widely agreed that Thames Water need to do more to achieve this when customers need to contact them, with many expressing frustrations with the time taken to respond to their queries and resolve their issues. However, as the majority infrequently or never contact customer services, this is ranked as a lower priority in Vision 2050 research. Customers want clear, proactive communication relating to problems they experience with our service, particularly when they can't be resolved in first contact/on the same day. Additionally, customers want to be assured that they are listened to and understood, and there are options available for support from Thames Water when they have an issue.

Divergence/conflicting views:

Older customers place a higher priority on fixing service issues on the same day than younger customers. Younger customers were more likely to engage with Thames Water than older customers. Customers acknowledge the importance of having a line of communication available to them, however, most customers don't frequently need to contact Thames Water and therefore this is less of a priority to them (provide an easy and personal customer service, using the latest technology, for everyone who uses the service). Personalised service is of greater importance to customers who are themselves disabled, or who live with someone who is disabled, such as providing accessible contact methods to ensure no one is excluded. Londoners view Thames Water providing a personalised service using the latest technology as significantly more urgent compared to Thames Valley customers. Customers who had had a previous bad experience when contacting Thames Water were more likely to have a negative attitude towards them. Customers who live with someone who is, or are themselves disabled and customers living in London see providing a personalised service with accessible contact channels as a higher priority than other groups.

Insight source robustness:

Whilst some of the evidence sources were considered to be of 'moderate' robustness, there is a good amount of evidence which has come from robust key engagement sources, including Vision 2050 research, PR24 Foundation research and WRSE workshops, as well as ongoing customer engagement. Evidence from PR19 engagement constituted a small minority of the insight on this topic.

CS1. I want an easy customer experience and tailored support

/ Billing

Summary

Customers trust Thames Water to treat them fairly when it comes to billing because they feel that bills are currently transparent and easy to understand. However, more could be done to ensure that all Thames Water's customers can read and understand their bills i.e. non-native English speakers.

Additionally, not all customers are aware of the payment options which are available to them.

A large majority of non-household customers believe it is important that their water and sewerage bills are based on meter reads rather than estimates.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dives

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

Customers generally agree that their bills are transparent and easy to understand which helps build trust in the accuracy and fairness of bills. Customers think it is important that bills are based on meter reads/usage rather than estimates.

Divergence/conflicting views:

There is more of an interest amongst non-household customers in the use of smart meters to accurately calculate their bills based on what they use, rather than through estimates. While medium sized businesses are more likely to state that metering is important, small businesses are less likely to believe it avoids unexpectedly high bills. White customers, older customers and women see providing an inclusive and affordable service as a higher priority compared with other groups. While medium sized businesses are more likely to state that metering is important, small businesses are less likely to believe it avoids unexpectedly high bills.

Insight source robustness:

There is limited insight into customer and stakeholder views on this topic, relative to other topics. However, some robust, key sources have contributed evidence on this topic, primarily relying on PR24 foundation research and a range of ongoing customer engagement. There was a small minority of evidence which was contributed by PR19 engagement.

CS1. I want an easy customer experience and tailored support

/ Vulnerable customer support

Summary

Vulnerable customers, such as those with particular health needs, expect us to understand and respond to their specific needs. There are many forms of vulnerability, some of which can be temporary, and therefore there should be a range of available communication channels to suit their needs and preferences.

Vulnerable customers want us to ensure all touchpoints with them are appropriately tailored.

We need to continue to raise awareness of the Priority Services Register (PSR) and the support we can offer vulnerable people.

Customers expect us to design services and propositions that help those who could otherwise be disadvantaged due to factors such as low income, mental health challenges or physical disabilities.

Vulnerable customers may have a range of different needs and need tailored services that address those specific needs.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

Customers views on the PSR are generally aligned; customers, when informed, are supportive of the idea of the PSR and those who are on it are generally satisfied with the services provided. Customers with specific issues or needs, such as a disability, age, mental health condition or other medical need, are particularly sensitive to certain elements of our service, such as outages and billing. Vulnerability can also impact how customers depend on the service, as well as how they interact with Thames Water. They call for the appropriate support to be in place for when things do go wrong so that they are not severely impacted.

Divergence/conflicting views:

The majority of older customers wanted to be automatically enrolled onto the PSR, a sizeable minority wanted to be consulted first. Women tend to see helping those who need it most as a higher priority compared with men. Disabled customers and those 65+ are marginally more aware of PSR features. Older socially isolated people can be particularly concerned about leakage and the impact on bills - they tend to have limited interest in planning for the future and feel their water use is limited. Older customers (75+) have a stronger preference for maintaining current service levels. Older customers also see providing an inclusive and affordable service as a more urgent issue. Some customers mentioned that they would be embarrassed to talk about financial difficulty on a phone call, with others pointing out that finances are quite private, or that pride may stop some people asking for help. Some customers are okay about talking about their finances on the phone as long as they can be sure that the person they are talking to is who they say they are.

Insight source robustness:

There is a range of evidence sources which are relevant to this topic, the majority of which are considered to be robust, including ongoing customer engagement, targeted vulnerability research and PR24 foundation research. No PR19 engagement sources contributed evidence towards the insight on this topic.

AF1. I want fair and affordable bills

/ Affordability

Most of our customers think water charges are affordable and are satisfied that the service offers value for money. However, although water bills are generally lower than other utilities, an increasing number of customers feel they struggle to pay their bill. Additionally, only a small proportion of those eligible get financial support with their water bill.

Financial assistance is appreciated by those who receive it but they suggest we could be more proactive at an earlier stage and better promote available support.

The price we charge and the quality of service we deliver shapes customer views on value for money.

Value for money is the top driver of brand reputation.

In order to improve perceptions of value for money, customers want to feel they receive a high-quality, reliable service from us, and recognise the scale of work that we do.

Significant increases to bills (£30 or more in a year) need to be clearly communicated.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

Views are generally aligned amongst customers that the cost of their water bill is reasonable, however, in light of the current cost of living crisis it has become an increasing priority for customers for Thames Water to maintain affordability as an increasing number of customers are struggling to pay their bills generally, which is also impacting perceptions of the value for money provided by Thames Water. Keep bills affordable and show that services are value for money was ranked 5th of 19 Vision 2050 goals. Consistency is viewed as a high priority when it comes to billing and customers are likely to regularly check their bills for mistakes and inaccuracies, as a result of the cost of living crisis.

Divergence/conflicting views:

Low income households were more concerned around the affordability of bills, and are more likely to use less water to save money. They were also more concerned about smart metering increasing their bills and about the bill impacts of leakage. They want certainty over finances and billing and struggle with constrained incomes that may change from month to month, particularly if they have a health condition or have dependent children. Customers who have had a smart meter installed are positive about the increased awareness of the amount of water they use. BME customers see providing value for money as less important and less urgent as a priority compared to white customers.

Non-household customers are more interested in usage data from smart meters for use in financial planning and sustainability and want proven long-term benefits before being willing to pay for data services. Retailers are less precise on exact price points; their main requirement is that any additional costs are fair and justifiable, to ensure they can be passed onto customers with clear benefits. Some third-party providers are concerned about the impact of Thames Water's smart meters competing with the services that they offer and restricting choice to end customers, particularly if Thames Water is considering moving into the data analytics space which could threaten to undercut their business.

Older customers, white customers and women place a higher priority on providing value for money than other groups. Future bill payers want a role to play in influencing what their bills will look like, and also expressed a desire to pay more for things like improving the environment and being more sustainable. Men view ensuring services are value for money and providing an inclusive and affordable service as less important, also viewing the latter as less urgent compared to women

Insight source robustness:

There were a broad range of evidence to support insight on this topic, the majority of sources being considered to be robust, including Vision 2050, DWMP and external research. PR19 engagement provided a minority of the evidence used for this topic.

AF1. I want fair and affordable bills

/ Social Tariffs

Summary

Most customers think water charges are affordable and are satisfied that the service offers value for money.

They also accept paying some extra on their bill to support a discounted tariff for low-income customers. They welcome other forms of financial assistance and urge us to better promote all our schemes to eligible customers.

Customers feel social tariffs should be better promoted to those eligible.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRSE - WRMP	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

Insight Triangulation	
Evidence robustness	Med
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

Customers are generally in support of paying extra on their bill to support a discounted tariff for those struggling to pay and that Thames Water should be supporting low income and vulnerable customers to ensure they don't go without water. The majority of customers are increasingly concerned about how high energy bills will impact their finances in light of the cost of living crisis, however, awareness of the types and level of support available and offered to financially vulnerable customers is generally quite low. Therefore, there are expectations of Thames Water to better promote all available support.

Divergence/conflicting views:

Women tend to see helping those who need it most as a higher priority compared with men. Financially vulnerable and disabled customers are marginally more aware of reduced tariffs and 65+s are substantially more aware of meter installation and water efficiency advice/freebies. Dual customers who were middle aged and customers with disabilities, and wastewater only customers who were older, white customers and those not struggling to pay their bills revealed the highest support for paying the highest charge to contribute towards the social tariff.

Insight source robustness:

There were relatively few evidence sources which contributed towards insight on this topic. Strong evidence sources include Vision 2050 research, PR24 foundation research and BAU customer research. A large minority of evidence also came from PR19 engagement which has impacted the overall robustness for this expectation.

Segmented Insights

Different groups within our customer base have different service relationships with us and different needs & expectations. This section of the Customer Service engagement summary detailes the high level Wants and key insights that have been gathered specific to vulnerable customers, business customers, retailer customers and developers.

Vulnerable customers

Water quality, pressure and interruptions to supply are of particular concern to customers with specific medical conditions or disabilities, and they want us to prioritise services to them.

Those with high water use (e.g. due to a medical condition) may rely on an uninterrupted supply for their treatment and these customers want us to appreciate the potential risk to their health and prioritise them during outages.

Vulnerable customers want to feel like they are being listened to and our customer service staff treat them with empathy and understanding. They expect us to understand and respond to their specific needs, particularly those with health needs and the elderly.

They would like us to raise awareness of our Priority Services Register and the specific services we offer.

Business customers

Business customers are particularly concerned about service failures as these potentially cost them loss of trade and customers.

They expect proactive contact, an explanation, an apology and higher levels of compensation during service failures. They would like communication ahead of interruptions for planning and mitigation purposes.

They also want us to identify vulnerable businesses and put in place enhanced communications and emergency provision.

Businesses are particularly concerned with accuracy of billing to inform their budgeting and forecasting.

Retailers

Retailers only want us to contact their customers under certain circumstances such as unplanned events and the operational side of the wholesale water/wastewater market.

They want to see smart meters adopted as this is regarded as an important step to achieving better water efficiency across the UK, by allowing for more accurate meter reading and monitoring.

They are particularly concerned with any aspect that impacts billing of their non-household end-consumers.

They want data accuracy to be improved by ensuring they can access customer meters, consumption data and take readings without disruption.

Developers

Developers would like better information sharing to collaborate on future plans and they want us to facilitate greater co-ordination with our engineers and other utilities.

Different types of developers want different levels of support. The specific needs of different developer segments could be met with a mix of improved communication, new online tools, centralisation and collaboration with us.

Developers want a consistent one-to-one relationship with us, to help them easily deal with problems and prevent delays. Developers value proactive communication from Thames Water.

Developers want value for money and for Thames Water to improve billing accuracy

Future Bill Payers

Future bill payers are generally less aware of and engaged with Thames Water's wider activities and initiatives.

Compared with other customers, they also appear to be less satisfied more generally with a number of aspects of Thames Water's core service areas.

List of sources and triangulation robustness / weighting scores

Approach to weighting evidence sources

In this section we will provide an overview of the evidence scoring system based on 'The Magenta Book' – guidance for qualitative evaluation by the UK Government:

The 3 categories for evaluation of engagement sources are:

- Methodologically sound
- Rigorously gathered
- Credibly interpreted

A 'contributory score' is also given to each insight, from each event, to evaluate its relevance to a certain topic (service area).

These categories for engagement events are scored according to their requirements, then an average 'Overall Score' is established for each source. An outline of each category's scoring requirements is in the table below.

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

		extensive detail of feedback.		

Quality indicators	Description	Questions
Contributary evidence	Contributory in advancing wider knowledge or understanding about the topic	How closely linked is the feedback to the specific output being evidenced? ▪ Is the information valuable for business planning purposes? ▪ Does this information confirm what I already know about my customers? ▪ If no what explains the discrepancy? ▪ If no, does it give me an alternative perspective? ▪ If yes, how should I adapt my analysis of customer preferences? ▪ Does the evidence support claims for wider inference?
Methodologically sound	Defensible in design by providing a research strategy that can address the evaluation question posed	How well was the engagement/research conducted compared to best practice principles? ▪ What sorts of questions does this method answer? ▪ Are any of the methods applied less well established, new or innovative? If yes, do I need to establish how sound these methods are? ▪ Has the methodology been appropriately adapted and refined for the specific purpose for which it has been used? ▪ Is it clear that good practice is followed?
Rigorous data collection	Rigorous in conduct through systematic and transparent collection, analysis and interpretation of qualitative data	Did the engagement work with significant volume? Was the evidence captured effectively? ▪ How was data gathered? ▪ Were best practice methods applied for gathering the data ▪ Is the collected data detail rich and in-depth?
Credible analysis and interpretation	Credible in claim through offering well-founded and plausible arguments about significance of the evidence generated	How credibly/independently was the evidence evaluated? How does the interpretation ensure the avoidance of bias? ▪ Was the context of the engagement provided? ▪ Are there biases to be aware of which may not have been mitigated by the methodology? ▪ Does the evidence provide multiple perspectives and alternative positions?

List of evidence sources for Customer Service

A list of sources that have been used to derive insights for the area and the overall source weighting score for each.

Source Ref	Source Group	Source Name	Description	Date	Overall Score
CX1	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Nov 21)	Customers service by business area including latest service and brand insights, business area service summaries (Nov 21)	Dec-21	2.4
CX2	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 21)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 21)	Jan-22	2.4
CX3	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 20)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 20)	Jan-21	2.4
CX4	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jan 21)	Feb-21	2.4
CX5	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Feb 21)	Customers service by business area including latest service and brand insights, business area service summaries (Feb 21)	Mar-21	2.4
CX6	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Mar 21)	Customers service by business area including latest service and brand insights, business area service summaries (Mar 21)	Apr-21	2.4
CX7	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (April 21)	Customers service by business area including latest service and brand insights, business area service summaries (Apr 21)	May-21	2.4
CX8	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 21)	Customers service by business area including latest service and brand insights, business area service summaries (May 21)	Jun-21	2.4
CX9	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jul 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jul 21)	Jul-21	2.4
CX10	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jul 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jul 21)	Aug-21	2.4

CX11	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Aug 21)	Customers service by business area including latest service and brand insights, business area service summaries (Aug 21)	Sep-21	2.4
CX12	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Sep 21)	Customers service by business area including latest service and brand insights, business area service summaries (Sep 21)	Oct-21	2.4
CX13	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Oct 21)	Customers service by business area including latest service and brand insights, business area service summaries (Oct 21)	Nov-21	2.4
CX14	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 22)	Customers service by business area including latest service and brand insights, business area service summaries (Jan 22)	Feb-22	2.4
CX18	Customer experience insights	C-MeX Year 1 Review: Customer Research & Insight (May 21)	C-MeX performance in 2021	May-21	2.8
CX19	Customer experience insights	C-MeX Q1 Year 2 (2021-22) headlines: Customer Research & Insight (Jul 21)	C-MeX performance in Q1 2021-22	Jul-21	2.8
CX20	Customer experience insights	C-Mex Q2 Year 2 (2021-22) headlines: Customer Research & Insight (Oct 21)	C-MeX performance in Q2 2021-22	Oct-21	2.8
CX21	Customer experience insights	C-MeX Q3 Year 2 (2021-22) Headlines (Feb 22)	C-MeX performance in Q3 of 2021-22	Feb-22	2.8
CX22	Customer experience insights	Brand Survey (Q1 2021/22)	Summary of findings for Brand Survey in Q1 in 2021/22	Jun-21	2.3
CX23	Customer experience insights	Brand Survey (Q2 2021/22)	Summary of findings for Brand Survey in Q2 in 2021/22	Sep-21	2.3
CX24	Customer experience insights	Brand Survey (Q3 2021/22)	Summary of findings for Brand Survey in Q3 in 2021/22	Dec-21	2.3
CX27	Customer experience insights	Affordability Re-imagined Journey Design Workshop Playback from 21/10/21	Report on research into affordability and billing - playback from workshop with customer interviews and key statistics	Oct-21	2.4
CX29	Customer experience insights	Thames Water Customer Voices Key Insights 2021-2022	Excel spreadsheet with key stats on polls and forums run throughout 2021-22	Jan-22	2.9
CX32	Customer experience insights	Thames Water Customer Voices: Welcome Letter Evaluation (Aug 21)	Summary of findings from Customer Voices panel to test communication preferences, gain feedback from new welcome email and understand if this would lead to more online account set-up	Aug-21	2.6
CX33	Customer experience insights	TW D-MeX (Developer Services) 2021-22 Q2 Summary (Dec 21)	Overall D-MeX performance in Q2 of 2021-22, performance metrics, service satisfaction	Dec-21	2.8

CX35	Customer experience insights	CCWater research on SME customers' preferences for meter reading frequencies (Aug 21)	CCW's Summary report on SME customer preference on meter reading frequencies	Aug-21	2.8
CX36	Customer experience insights	Thames Water Board and Customer Engagement Session on Leakage (May 21)	Insights from leakage engagement activities	May-21	2.8
CX38	Customer experience insights	Over 80s Priority Services Register auto-enrolment Follow up customer research (Apr 21)	Summary of survey results given to customers over 80 who were automatically enrolled onto the PSR	Apr-21	2.9
CX40	Customer experience insights	Vulnerability customer insight 2022 (BSi Audit) (Jan 22)	Presentation on various insights regarding customer vulnerability and how Thames acts on insights	Jan-22	1.7
CX42	Customer experience insights	Non household Smart Meters and Data Research (Jul 21)	Report on research on non-household customers' current engagement with water meters and data, water consumption data, attitudes to receiving additional data service from TW	Jul-21	2.7
CX45	Customer experience insights	Thames Water Board and Customer Engagement Session on Leakage (Jul 20	Insights from online customer leakage research	Jul-20	2.8
CX46	Customer experience insights	Bill Redesign Research: Qualitative Debrief	Slides on bill redesign aims & approach, key findings, metered direct debit feedback, metered pay on bill feedback, unmetered feedback	Aug-21	2.8
CX47	Customer experience insights	D-MeX Year 1 Review	D-MeX report for Year 1 including overall scores, ranking and qualitative service satisfaction	Jun-21	2.7
CX48	Customer experience insights	Developer Services Heartbeat Insight	Developer Services Heartbeat of insights, 7 May to 4 Dec 2020	Dec-20	2.5
CX49	Customer experience insights	D-MeX 2020-21 Q2 Qual Results	D-MeX report for 2020-21, Quarter 2 including qualitative results	Dec-20	2.8
CX50	Customer experience insights	D-MeX 2021-22 Q1 Qual Results	D-MeX report for 2021-22, Quarter 1 including qualitative results	Sep-21	2.8
CX51	Customer experience insights	D-MeX 2021-22 Q3 Summary	D-MeX report for 201-22, Quarter 3 including overall performance, quantitative performance metrics and qualitative results	Mar-22	2.8
CX52	Customer experience insights	R-MeX Report, December 2020	R-MeX report for Thames Water from Market Operator Services Ltd (MOSL) from Dec 2020	Dec-20	2.1
CX53	Customer experience insights	R-MeX Report, August 2021	R-MeX report for Thames Water from Market Operator Services Ltd (MOSL) from Aug 2021	Aug-21	2.2
CX54	Customer experience insights	R-MeX Report, February 2022	R-MeX report for Thames Water from Market Operator Services Ltd (MOSL) from Feb 2022	Feb-22	2.2
CX55	Customer experience insights	Billing Content: Testing Insights	Insights & recommendations from testing new billing content	Undated	2.6

CX61	Customer experience insights	PR24 Service Survey Phase 1 Deep Dive Keywords	Summary of customer comments per customer area and journey	Feb-22	2.1
CX62	Customer experience insights	Brand Survey (Q4 2021/22)	Summary of findings for Brand Survey in Q4	Mar-22	2.3
CX66	Customer experience insights	C-MeX Q4 Year 2 (2021-22) Headlines (May 22)	C-MeX performance in Q4 of 2021-22	May-22	2.8
CX67	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 22)	Customers service by business area including latest service and brand insights, business area service summaries (April 2022)	May-22	2.1
CX69	Customer experience insights	Vulnerability Insight Report 2021-22 Q4	Quarterly report on customers in vulnerable circumstances Q4 2021/22	May-22	2.1
CX73	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (June 22)	Customers service by business area including latest service and brand insights, business area service summaries (May 2022)	Jun-22	2.3
CX76	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (July 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Jul 2022)	Jul-22	2.4
CX77	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (August 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Aug 2022)	Aug-22	2.4
CX78	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (September 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Sep 2022)	Sep-22	2.4
CX79	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (October 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Oct 2022)	Oct-22	2.4
CX80	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (November 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Nov 2022)	Nov-22	2.4
CX81	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (December 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 2022)	Dec-22	2.4
CX82	Customer experience insights	Social Tariff Research Sep 22	Summary of research conducted to determine the level of additional cross-subsidy supported by customers to 2025	Sep-22	2.8
CX84	Customer experience insights	Vulnerability Insight Report 2022-23 Q1	Quarterly report on customers in vulnerable circumstances Q1 2022/23	Aug-22	2.0

CX88	Customer experience insights	Brand Survey Q1 2022-23	Summary of findings for Brand Survey in Q1 2022-2023	Jun-22	2.4
CX89	Customer experience insights	C-MeX CES and Brand Survey Insights Q2 2022-2023	Summary of findings for Brand Survey in Q2 2022-2023	Sep-22	2.4
CX90	Customer experience insights	Vulnerability desk based research slide deck	Preliminary analysis workshop to inform qualitative research on vulnerability amongst Thames Water customers	Nov-22	1.0
CX91	Customer experience insights	Vulnerability Insight Report 2022-23 Q2	Quarterly report on customers in vulnerable circumstances Q2 2022/23	Nov-22	1.7
CX96	Customer experience insights	D-MeX 2022-23 Q1 Review	Summary of findings for D-MeX in Q1 2022-2023	Sep-22	2.8
CX97	Customer experience insights	D-MeX 2022-23 Q2 Review	Summary of findings for D-MeX in Q2 2022-2023	Dec-22	2.8
CX100	Customer experience insights	UX - Affordability persona insight discovery 2021	High level summary of research into awareness of social tariffs and financial support	Oct-21	1.8
CX105	Customer experience insights	Brand survey 2022/23 Future customer analysis - non bill payers aged 18-34* in dual service areas	Review of previous research to highlight divergence in the views of future customers from household customers more generally	2022/2023	2.8
CX109	Customer experience insights	Thames Water Developers day 2023 Poll Results (27 Feb - 03 Mar 2023)	Survey of developers in Thames Water's region on their experiences dealing with Thames Water	Feb-Mar 2023	1.6
CX110	Customer experience insights	CCW Water Matters 2022 (Thames Water Results and full data report)	Thames Water's results of CCW's annual customer survey on people's satisfaction with various elements their water and wastewater service	Apr-23	2.6
CX111	Customer experience insights	D-MeX 2022-23 Q4 year 3 review	D-MeX report for 2022-23, Quarter 4 including qualitative results	Jun-23	2.2
CX113	Customer experience insights	Vulnerability Deep Dive research	In-depth research with vulnerable customers to gain a better understanding of their circumstances and needs.	May-23	2.9
CX114	Customer experience insights	C-MeX CES and Brand Survey Insights Q4 2022-2023	Summary of findings for Brand Survey and C-MeX in Q4 2022-2023	Mar-23	2.1
CX119	Customer experience insights	Vulnerability insight report 2022-2023 Q4	Quarterly report on customers in vulnerable circumstances Q4 2022/23	May-23	1.7
CX120	Customer experience insights	C-MeX CES and Brand Survey Insights Q1 2023-2024	Summary of findings for Brand Survey and C-MeX in Q1 2023-2024	Jul-23	2.1
CX122	Customer experience insights	Future Customers context	Research with future customers to better understand the issues that are important to them and the ways these evolve so that this can be taken into account for future business and strategic planning	Aug-23	2.6

CX124	Customer experience insights	Southern Region PR24 Developer Engagement	Collaborative session with developers, NAVs, SLPs, consultants and supply chain stakeholders to provide information and elicit views on a range of topics.	Jul-23	2.3
CX126	Customer experience insights	Vulnerability insight report 2023-2024 Q1	Quarterly report on customers in vulnerable circumstances Q1 2023/24	Aug-23	2.2
CX128	Customer experience insights	Innovative tariffs research	Testing the proposed new social tariff with customers to understand level of support.	Sep-23	3.0
R10	External Research	UKSCI January 2022 Results - Utilities Sector Resource Pack	Excel spreadsheet on all-sector overview, satisfaction trends, Y-o-Y changes, customer priorities and range of scores, channels, balance of price and service, right first time and complaints, contact type, key metrics by organisation, demographics.	Jan-22	1.8
R14	External Research	CCW + Ofwat Customer Spotlight	Joint report from CCW and Ofwat on people's view and experiences of water	Apr-22	2.8
R15	External Research	CCW + Ofwat Customer Preferences Research	Joint report from CCW and Ofwat on customer preferences, including customer ranking of draft performance commitments	Apr-22	2.4
R16	External Research	MACRO4 - Utility Customer Research	Utility customer sentiment on key issues, including digital self-service, digital billing and environmental initiatives	Feb-22	2.8
R17	External Research	Ofwat - Cost of Living: Water Customers' Experiences	Ofwat report on water customers’ experience of cost of living	May-22	2.6
R36	External Research	Cost of living diaries: Overcoming barriers to seeking support	Report exploring 'newly vulnerable' groups of the public, as well as their behaviours and barriers in relation to seeking support and how to overcome these barriers to accessing support.	Nov-22	2.8
R39	External Research	CCW - Household complaints report	This report looks specifically at the experiences of household customers, using written complaints made directly to water companies and those that customers have brought to CCW	Mar-22	1.9
R40	External Research	CCW Water Matters Highlights Report 2021	CCW’s annual Water Matters survey tracks the views of household customers on the services they receive from water companies in England and Wales	Jul-22	2.3
R53	External Research	Ofwat - Cost of living: Wave three - water customers' experiences,	Ofwat report on water customers’ experience of cost of living	May-23	2.6
SP6	Strategic planning	Water Supply System Resilience Programme - Customer Research (Quantitative Findings) (Jan 2021),	Summary of quantitative phase of customer research into customer attitudes to resilience	Jan-21	2.8
SP8	Strategic planning	DWMP - Customer Research: Part 2 Qualitative Research: Final Report (Oct 21)	Drainage and wastewater management plan qualitative research results	Oct-21	2.9

SP12	Strategic planning	Vision 2050 Research	Summary of customer support on Thames Water Vision 2050 goals	May-22	2.9
SP14	Strategic planning	WRSE Water resources Quant Research	Quantitative findings and next steps from WRSE Workshop 5	Jun-22	2.7
SP17	Strategic planning	Water Club Added Value for Strategic Resource Options	Research to understand what added value customers perceive is important as part of infrastructure development, to understand preferences for the added value and how much customers are prepared to pay	Jul-22	2.7
S8	Stakeholder and community insights	PR19 Summary of Stakeholder Engagement	Summary of stakeholder engagement undertaken for PR19 business plan	Apr-19	1.8
S14	Stakeholder and community insights	Stakeholder Reputation Research	Summary of stakeholder reputation research including perceptions of the water industry and Thames Water	Mar-22	2.9
S26	Stakeholder and community insights	Research Summary Form - PR24 Youth session	Summary report to identify opportunities to engage with youth on the PR24 business plan, water efficiency, sewer misuse and climate related themes more broadly.	Jul-22	1.5
S39	Stakeholder and community insights	Stakeholder Reputation Research	In=depth interviews with a range of stakeholders to better understand how they perceive Thames Water and identify any risks to relationships/reputation.	Mar-23	2.9
PR24-1	PR24	PR24 Foundation Research - An analysis of customer views and expectation of Thames Water (Nov 21)	Summary of research designed to validate Sia Partners WCCSW: large scale social listening, ethnographic videos, online communities	Nov-21	1.8
PR24-2	PR24	PR24 Foundation Research - Customer Voices (Nov 21)	A more detailed report on the Customer Voices (online community) section of the PR24 Foundation Research	Nov-21	2.8
PR24-3	PR24	PR24 Foundation Research - Social media analysis (Nov 21)	A more detailed report on the Twitter section of the PR24 Foundation Research	Nov-21	1.8
PR24-10	PR24	Deep Dive: Trunk Mains and Replumb London (Feb 22)	Trunk mains and replumb London deep dive research report	Feb-22	2.7
PR24-14	PR24	Acceptability and Affordability Testing (Qualitative findings)	Qualitative Acceptability and Affordability Testing with customers with different PR24 business plans	May-23	3.0
PR24-17	PR24	Acceptability and Affordability Testing (Quantitative findings)	Quantitative Acceptability and Affordability Testing with customers of the refined plan, following the qualitative phase	Sep-23	3.0
PR19-4	PR19	CR19 Intergenerational fairness, CCWater (Oct 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg60, pg71	Oct-16	2.0
PR19-7	PR19	CR26c Deep Dives, Odour BritainThinks (Sep 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg86, pg87	Sep-16	2.0
PR19-10	PR19	CR26d Deep Dives, sewer flooding and blockages, BritainThinks (Oct 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW pg53	Oct-16	2.0

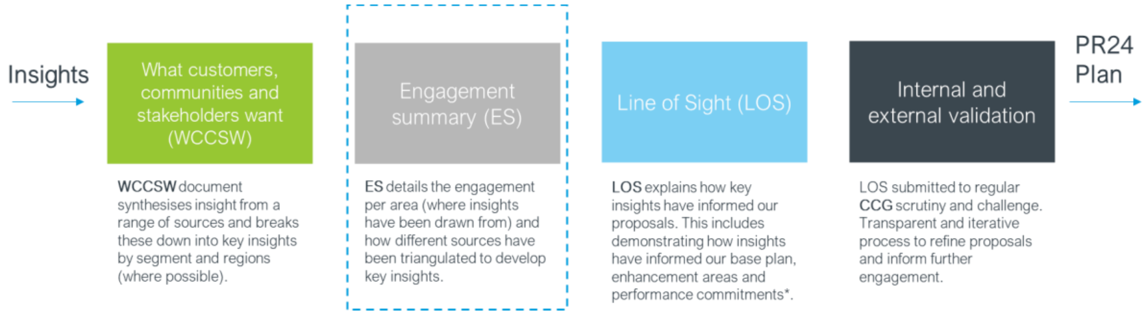
PR19-13	PR19	CR32 Being a good neighbour, BritainThinks	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg82, pg83, pg84, pg85	Mar-17	2.0
PR19-21	PR19	CR58c Social Tariffs, Populus (Mar 2018)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg70	Mar-18	2.0
PR19-22	PR19	CR61c PR14 Reconciliation online community task, BritainThinks (Aug 2018)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg73	Aug-18	2.0
PR19-23	PR19	CR61b Reduced bill profile online community task, BritainThinks (May 2018)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg73	May-18	2.0
PR19-46	PR19	EX18 Essential services and people with mental health problems, BritainThinks (May 2018)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg75	May-18	2.0
PR19-57	PR19	Hatton Garden Streetworks, Populus (May 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 84	May-16	2.0
PR19-63	PR19	CR08a/b Deliberative overlays, BritainThinks, March 2016	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 70, 75 & 93	Mar-16	2.0
PR19-65	PR19	CR29b WRMP Stage 2, BritainThinks, December 2016	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 75 & 98	Dec-16	2.0
PR19-69	PR19	CR56a Developer Day feedback, Populus, November 2016	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 96	Nov-16	2.0
PR19-70	PR19	CR56b Developer Services Deep Dive, Verve, May 2017	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 96	May-17	2.0
PR19-71	PR19	CR56c Developer Day pre-survey, Thames Water, January 2018	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 96	Jan-18	2.0
PR19-72	PR19	Delivering outcomes for developers, 2019	Thames Water internal report on developer services, including measuring customer satisfaction, delivering for customers and forecasts	2019	2.0
PR19-73	PR19	Customer Segments, 2019	Thames Water internal report on customer segments within developer services including information on relationship & priorities, wants & needs and challenges	2019	2.0

Water Engagement Summary

Purpose

The purpose of the Engagement Summary (ES) is to provide an overview of the customer, community and stakeholder engagement undertaken for each core strategy area of the PR24 business plan (water, wastewater and customer service).

It is intended to sit between the programme wide 'What Customers, Communities and Stakeholders Want' (WCCSW) and the Line of Sight (LOS) sections in various documents across the business plan.



It sets out the details of the key insights derived from the PR24 engagement programme and how different sources have been triangulated to inform these.

This aims to provide a clear and transparent view of the robustness of engagement evidence linked to each topic, any tensions in views and how these have been addressed.

This document serves as the Engagement Summary for Water. It is comprised of three main parts:

- Key insights to inform our Water strategy from customer, community and stakeholder engagement and the key sources of engagement used
- Triangulations of Insights - documentation of the robustness of evidence supporting each key insight and any tensions or divergence in views between groups or regions
- List of sources and triangulation robustness / weighting scores

Key insights used to inform our Water strategy

This section provides a summary of the key insight sources we have drawn upon in our engagement for Water. This includes our previous insight sources from PR19, ongoing customer insight and community/stakeholder engagement activities, our strategic long-term plans and our PR24 Business Plan targeted engagement.

The table below summarises the key insights for Water that we have drawn from What Customers, Communities and Stakeholders Want (v18.3) and the engagement summary that follows. This includes a list of key sources used to derive each key insight. The full list of sources used is then included, listing sources and triangulation robustness / weighting scores.

ID	Key Topics	Key Sources
WT1	**For Customers /** I want a constant supply of safe, high-quality water at good pressure	
Water quality		CX22-24, CX64, CX89, CX106, CX110, CX113, CX114, CX120 PR19-11, PR19-14, PR19-43 PR24-8, PR24-12 R13, R14, R15 SP3, SP12
WT2	**For Customers /** I want a reliable supply with minimal disruption	
Water supply interruptions		CX45, CX64, CX110, CX113 PR19-18, PR19-53 PR24-2, PR24-11, PR24-12 R40 S14 SP5, SP6, SP12, SP19
Water network resilience		PR19-4, PR19-59, PR19-62 PR24-1, PR24-10, PR24-12, PR24-14, PR24-15 S8, S9, S11, S12, S38, S39 SP5, SP6, SP12
WT3	**For the Environment /** I want you to fix leaks and ensure there is enough water now and in the future*	
Water resources		CX68, CX85, CX86, CX104 PR24-14 PR19-19, PR19-58, PR19-59, PR19-61 R13 S8, S14, S19, S39, S41 SP1, SP5, SP12, SP14, SP19, SP21, SP22

Water demand management	CX42, CX45, CX56, CX85-CX87, CX104, CX113 PR19-2, PR19-39, PR19-45, PR19-60 PR24-12, PR24-14 R14, R37 S3, S27, S38, S40, S41 SP1, SP12, SP14, SP21, SP22
Sustainable abstraction	CX24 PR19-16 PR24-1, PR24-7 S8, S18, S20 SP4, SP15, SP21
Leakage	CX37, CX45, CX104 PR19-12, PR19-58 PR24-10, PR24-12 SP12, SP19, SP21 S18

**ENV1. I want you to reduce your impact and restore the environment* cuts across the other wants within ‘For the Environment’

Triangulation of insights for Water

In this section we provide further detail on each key insight including an assessment of the robustness of evidence and a summary of any divergent views. A further assessment of source robustness is then provided.

WT1. I want safe, high-quality drinking water

/ Water Quality

Summary

Customers expect a dependable service from us across all core water service areas, including ensuring safe and high-quality drinking water.

When thinking about their water supply, customers rarely mention safety as a concern due to awareness of regulations in place and perceived stability of water companies. However, water safety and quality remain of great importance to customers, and they prioritise keeping this at a high standard.

The majority of customers are dissatisfied with the hardness of their water. Customers generally don't understand its cause and see it as an inconvenience. While they do not support softening water centrally, they would welcome service improvements in the form of providing information (including the health benefits and disbenefits of hard and soft water), advice on how to deal with hard water problems and recommending products to help manage or reduce water hardness.

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder research	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability deep dive research

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Med
Regional differences	Med

Triangulation comment:

General message:

- Views on this service area are consistent in that it is crucially important and of the highest priority (ranked 1st of 19 Vision 2050 goals) that customers receive the highest quality water which is safe to drink.
- Most customers are satisfied with this, however, the majority of customers are not satisfied with the hardness of their tap water.
- Once informed, customers were concerned around the health impacts of lead pipes, particularly to children. Whilst this was not considered a high priority compared to other Vision 2050 goals (ranked 8th of 19), the lead pipes enhancement package was ranked as a higher priority due to the potential 'win-win' from protecting customer health and replacing ageing infrastructure.
- Also as part of enhancement package research, customers revealed that they prioritise the improvement of water treatment as the thought of contamination from bacteria was 'alarming' and that this could be a 'quick win' for Thames Water as a simple solution to a safety issue.

Divergence/conflicting views:

- Women, customers who live with someone or who are themselves disabled, and customers living in the Thames Valley & Home Counties place a higher priority compared with other groups on providing safe clean drinking water.
- Customers from BME backgrounds place less urgency on replacing lead pipes than white customers.
- Non-household customers felt that replacing lead pipes was a higher priority amongst water service improvement areas compared to household customers.

Insight source robustness:

Alongside Vision 2050 research, there were a range of robust evidence sources for this area, including PR24 Enhancement deep dives, WRSE workshops, PR24 enhancement package options research, and external research, as well as ongoing customer engagement. PR19 engagement contributed a small minority of the evidence used to support the insight on this topic.

WT2. I want a reliable supply with minimal disruption

/ Water supply interruptions

Summary

Customers tend to take their supply of water for granted and like it that way. They see water as a basic utility that they do not really want to have to think about. They want to rely on water coming out of the tap and wastewater being taken away 24/7. They want the system to be proactively monitored, maintained and improved to ensure its reliability.

They expect this to happen even though there may be more severe challenges that might threaten their water & wastewater service in the future. Where this isn't possible, customers want Thames Water to understand the issue, tell them what they're going to do and deliver on that promise

Customers want little interaction with us, they appreciate that we appear invisible and don't have to think about us - the service just works. Customers expect us to pre-empt their needs by, for example, recognising a problem and proactively acting on it rather than waiting for them to contact us.

Whilst most customers are satisfied with their water pressure, they still expect us to monitor and maintain pressure. Customers are more tolerant of short-term incidents of low pressure, but chronic low pressure is seen as inconvenient, disruptive and unacceptable.

They consider pressure starts to become unacceptable if it takes around four times as long to fill a sink; happens twice a year or more or lasts around eight hours or more. Although customers do not want measures to improve pressure that could adversely affect leakage or supply interruptions.

Customers that have experienced low water pressure want us to be understanding and sympathetic during what is considered a considerable inconvenience.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability deep dive research

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Med
Regional differences	Low

Triangulation comment:

General message:

- Whilst some see issues around supply interruptions as more of an inconvenience than a severe risk, the general consensus amongst customers and stakeholders is that it is expected that Thames Water maintain their network and assets to ensure a reliable supply of clean water at good pressure - this is considered to be a fundamental area of service.
- Despite the importance placed on a reliable service by customers, the vast majority of customers are either satisfied with their water supply, or see it as acceptable, and that issues only impact a small minority of customers.
- Therefore, customers don't support paying more to reduce incidents of low pressure and in Vision 2050 research, customers ranked 'Provide a more reliable supply of water' in 6th place (out of 19 Vision 2050 goals).

Divergence/conflicting views:

- There is some divergence in the way of some groups being less tolerant of outages than others, including women, vulnerable customers, households with larger families and water-dependent businesses, as well as those who have previously experienced outages.
- Customers living in north-east London and the Lee Valley were the least tolerable to outages.
- The duration of supply interruptions is more important to customers who live with someone who is, or are themselves disabled.

Insight source robustness:

Alongside Vision 2050 research, there is strong qualitative and quantitative evidence from long-term strategic planning engagement which has informed this insight, including PR24 enhancement package options research, as well as minor contributions from PR19 engagement.

WT2. I want a reliable supply with minimal disruption

/ Water network resilience

Summary

Customers have clearly articulated the service they expect from us and how this should be maintained, and they expect us to plan for this service to be resilient in the long-term.

They want us to meet future challenges such as population growth, household changes, climate change and changing customer expectations, as well as hazards that may be increasingly likely in the future such as cyber-crime and terrorism.

Customers expect us to protect our business against severe hazards that may be increasingly likely in the future, such as weather, terrorism and cyber-crime.

They think about the impact the hazard would have on services, rather than the hazard itself and would not want services to deteriorate.

In relation to addressing trunk mains bursts and basement flooding, customers and stakeholders generally express a preference for a replacement over repair approach, however, many customers feel the benefits of this are too narrow to justify the high costs.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic

Insight Triangulation	
Evidence robustness	Med
Divergence of view (by group)	Med
Regional differences	Low

Triangulation comment:

General message:

- Views were generally consistent amongst customers and stakeholders and expect Thames Water to invest in its infrastructure to adapt to and mitigate future pressures and hazards, relating to climate change and population growth for example.

Divergence/conflicting views:

- Men place a lower emphasis on protecting services against climate change than women.
- There are some divergences in view in terms of the importance of 'replacing trunk mains' as an enhancement as the impact feels narrow and unfair, with potentially limited benefit (i.e. those in London and with basements whom some presume are therefore more ‘wealthy’), whereas others feel resolving this issue could have long-term societal benefits in terms of reducing wastage and future-proofing Thames Water’s systems.

Insight source robustness:

There are a range of sources where evidence from customers and stakeholders has been drawn upon to support this topic. Sources include PR24 enhancement package options research, PR24 Enhancement deep dives as well as contributions from engagement undertaken with stakeholders, and during PR19.

WT3. I want you to fix leaks and ensure there is enough water now and in the future

/ Water resources

Summary

Customers have clearly articulated the service they expect from us and how this should be maintained, and they expect us to plan for this service to be resilient in the long-term.

They want us to meet future challenges such as population growth, household changes, climate change and changing customer expectations, as well as hazards that may be increasingly likely in the future such as cyber-crime and terrorism.

Customers expect us to protect our business against severe hazards that may be increasingly likely in the future, such as weather, terrorism and cyber-crime.

They think about the impact the hazard would have on services, rather than the hazard itself and would not want services to deteriorate.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

- The general consensus amongst customers and stakeholders is that it is expected that Thames Water continue investing in their network and assets to ensure a resilient supply of clean water into the future against pressures such as climate change and population growth.
- This is a high priority for customers - ensuring the long-term security of supply in the region was the top priority for customers during WRSE research.
- Customers also ranked 'ensure there is enough water in the future, without taking too much from rivers and harming the environment' 2nd of 19 Vision 2050 goals.
- Customers' knowledge of the various resource options is generally limited, but their main concerns once informed are ensuring continued quality of their water supply and balancing the efficacy of the option in securing supply with the associated costs and environmental impacts of implementing those options.

Divergence/conflicting views:

- Customers want a resilient water supply that is ready to meet future demand, but they don’t want to see large bill rises to deliver security of supply.
- Some environmental groups, however, prioritise limiting environmental damage over considerations of cost savings.
- Stakeholders are supportive of a range of short and long-term interventions to improve supply, but in contrast to customers, want progress to be made on both at the same time.
- Women and white customers place higher importance on securing sufficient supply in the future without damaging the environment than men and BME customers, respectively.
- Developers are concerned about resilience issues in London, particularly in relation to the increasing presence of data centres.

Insight source robustness:

This topic is informed by customer and stakeholder insight from a range of key engagement sources, including PR24 Foundation research and Enhancement Deep Dives, Vision 2050 research, PR24 enhancement package options research and WRSE workshops.

WT3. I want you to fix leaks and ensure there is enough water now and in the future / Water demand management

Summary

Customers want us to be more ‘self-reliant’ around water supply in the Thames Water area, for example by reducing leakage and educating customers on how to save water, ahead of building strategic / regional resource water transfers. Customers fear that focusing on water transfers too quickly could create an over-reliance on such methods.

Few customers are aware that demand for water is projected to exceed supply. They call for greater efforts to increase awareness and help them use less water.

Customers see wasting water as a moral issue and are positive about using water wisely. Customers say we should make efficient use of current supplies before building new resources. Customers by and large accept the underlying need to reduce water consumption, but they want to know that we are doing our bit. Customers are uncomfortable with the idea that instead of fixing more leaks, we would seek to replace the water lost by introducing more water into the same ‘broken system’. They see this as wasteful and short-term thinking, as these leaks will need to be fixed in the long run when they get worse.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Med
Regional differences	Med

Triangulation comment:

General message:

- Customers and stakeholders generally think reducing consumption and improving water efficiency should be addressed, alongside leakage, ahead of building new supply resources.
- Water scarcity is generally underestimated as an issue in the UK and, whilst not wasteful with water, most customers aren't proactively taking steps to reduce their household's consumption.
- Customers ranked 'help customers to use less water' as a low priority compared to other Vision 250 goals (15th of 19). To achieve this, customers are supportive of educational and ad campaigns to promote and encourage water efficiency.
- Customers also broadly accept that the increased roll out of smart meters will be essential in reducing water consumption, and see metering as a fairer way to pay for what they actually use.

Divergence/conflicting views:

- Customers want us to prioritise improving our existing services ahead of finding new water resources, whereas given forecast population growth, non-household customers and stakeholders welcomed focussing on both at the same time.
- It was also revealed that younger customers from urban areas and from BME backgrounds are most likely to take water for granted.
- Older customers, women and customers living in London place higher importance on supporting customers to reduce their consumption.
- Younger customers were more likely to say their water usage had increased over the summer, whereas older customers were more likely to take part in everyday activities that contribute to a reduced water consumption.

Insight source robustness:

A range of robust evidence sources have contributed to the customer and stakeholder insight on this area, including WRSE research, Vision 2050 research, external research and ongoing customer engagement. A small minority of evidence has come from PR19 engagement sources.

WT3. I want you to fix leaks and ensure there is enough water now and in the future

/ Sustainable abstraction

Summary

Customers believe that improved water supply resilience should not be at the expense of the environment.

There was little support for taking more water from the rivers and groundwater in normal circumstances.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Qualitative AAT	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic

Insight Triangulation	
Evidence robustness	Med
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

- It was agreed amongst customers and stakeholders that Thames Water should not continue to rely on rivers and groundwater in normal circumstances as a water supply source.

Divergence/conflicting views:

- Some stakeholders (local government and community groups) called for Thames Water to go beyond reducing the strain on rivers and groundwater, and to remove it all together, despite future pressures.
- Customers living in the Thames Valley & Home Counties place higher priority on ensuring a sustainable water supply.

Insight source robustness:

There was a limited range of evidence drawn upon to support the insight on this topic. The vast majority of sources were considered to be of 'moderate robustness'. Key insight sources include Public Value research and PR24 Foundation research and Enhancement Deep Dives. PR19 engagement provided a small minority of the evidence for this expectation.

WT3. I want you to fix leaks and ensure there is enough water now and in the future / Leakage

Summary

Thames Water's performance on leakage as a core operational area plays a significant role in stakeholders' and customers' perception of the company.

How we handle leaks and negative media coverage about leaks are key drivers of our brand reputation. Leaks undermine perceptions of value for money and dependability.

Although customers' awareness of leakage is generally quite high, many are shocked at the scale of the problem when shown facts surrounding leakage (nearly a quarter of drinking water is lost through leakage and a considerable portion of this happens on customer properties). Reductions made by Thames Water so far are less than customers expect.

Thames Water taking too long to fix leaks is a recurrent theme in Social Media and Complaints analysis and only 37% of customers are fairly or very satisfied with how we deal with leaks. Customers view leaks as wasteful and believe they indicate poor maintenance. Leakage of treated water is seen as both a waste of money and of an important resource.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Qualitative AAT	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

- Consensus across customers and stakeholders is that leakage is a high priority for Thames Water to address and heavily impacts peoples' perception of the company.
- In WRSE research, customers see leakage as a top priority in improving the efficiency of the water supply system and customers ranked 'reduce leakage to below 10%' 4th of 19 Vision 2050 goals and 1st of enhancement areas tested during PR24 enhancement package options research.
- Customers feel it is unfair to ask customers to cut back on their usage whilst leakage rates are so high.

Divergence/conflicting views:

- Customers from BME backgrounds place less urgency on reducing leakage than white customers.
- Some customers are frustrated that leakage has got to these levels, believing Thames Water has sat on the issue for too long. In contrast, many respondents acknowledged the logistical complexity involved in reducing leakage.

Insight source robustness:

There was a range of robust evidence which supported the insight. Key sources include Vision 2050 research, PR24 Enhancement Deep Dives, PR24 enhancement package options research and ongoing customer engagement. The vast majority of evidence for this topic came from post-PR19 engagement sources.

List of sources and triangulation robustness / weighting scores

Approach to weighting evidence sources

In this section we will provide an overview of the evidence scoring system based on 'The Magenta Book' – guidance for qualitative evaluation by the UK Government:

The 3 categories for evaluation of engagement sources are:

- Methodologically sound
- Rigorously gathered
- Credibly interpreted

A 'contributory score' is also given to each insight, from each event, to evaluate its relevance to a certain topic (service area).

These categories for engagement events are scored according to their requirements, then an average 'Overall Score' is established for each source. An outline of each category's scoring requirements is in the table below.

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

		extensive detail of feedback.		

Quality indicators	Description	Questions
Contributary evidence	**Contributory** in advancing wider knowledge or understanding about the topic	**How closely linked is the feedback to the specific output being evidenced?** ▪ Is the information valuable for business planning purposes? ▪ Does this information confirm what I already know about my customers? ▪ If no what explains the discrepancy? ▪ If no, does it give me an alternative perspective? ▪ If yes, how should I adapt my analysis of customer preferences? ▪ Does the evidence support claims for wider inference?
Methodologically sound	**Defensible in design** by providing a research strategy that can address the evaluation question posed	**How well was the engagement/research conducted compared to best practice principles?** ▪ What sorts of questions does this method answer? ▪ Are any of the methods applied less well established, new or innovative? If yes, do I need to establish how sound these methods are? ▪ Has the methodology been appropriately adapted and refined for the specific purpose for which it has been used? ▪ Is it clear that good practice is followed?
Rigorous data collection	**Rigorous in conduct** through systematic and transparent collection, analysis and interpretation of qualitative data	**Did the engagement work with significant volume? Was the evidence captured effectively?** ▪ How was data gathered? ▪ Were best practice methods applied for gathering the data ▪ Is the collected data detail rich and in-depth?
Credible analysis and interpretation	**Credible in claim** through offering well-founded and plausible arguments about significance of the evidence generated	**How credibly/independently was the evidence evaluated? How does the interpretation ensure the avoidance of bias?** ▪ Was the context of the engagement provided? ▪ Are there biases to be aware of which may not have been mitigated by the methodology? ▪ Does the evidence provide multiple perspectives and alternative positions?

List of evidence sources for Water

A list of sources that have been used to derive insights for the area and the overall source weighting score for each.

Source Ref	Source Group	Source Name	Description	Date	Overall Score
CX1	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Nov 21)	Customers service by business area including latest service and brand insights, business area service summaries (Nov 21)	Dec-21	2.4
CX2	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 21)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 21)	Jan-22	2.4
CX3	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 20)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 20)	Jan-21	2.4
CX4	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jan 21)	Feb-21	2.4
CX5	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Feb 21)	Customers service by business area including latest service and brand insights, business area service summaries (Feb 21)	Mar-21	2.4
CX6	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Mar 21)	Customers service by business area including latest service and brand insights, business area service summaries (Mar 21)	Apr-21	2.4
CX7	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (April 21)	Customers service by business area including latest service and brand insights, business area service summaries (Apr 21)	May-21	2.4
CX8	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 21)	Customers service by business area including latest service and brand insights, business area service summaries (May 21)	Jun-21	2.4
CX9	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jun 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jun 21)	Jul-21	2.4

CX10	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jul 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jul 21)	Aug-21	2.4
CX11	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Aug 21)	Customers service by business area including latest service and brand insights, business area service summaries (Aug 21)	Sep-21	2.4
CX12	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Sep 21)	Customers service by business area including latest service and brand insights, business area service summaries (Sep 21)	Oct-21	2.4
CX13	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Oct 21)	Customers service by business area including latest service and brand insights, business area service summaries (Oct 21)	Nov-21	2.4
CX14	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 22)	Customers service by business area including latest service and brand insights, business area service summaries (Jan 22)	Feb-22	2.4
CX18	Customer experience insights	C-MeX Year 1 Review: Customer Research & Insight (May 21)	C-MeX performance in 2021	May-21	2.8
CX19	Customer experience insights	C-MeX Q1 Year 2 (2021-22) headlines: Customer Research & Insight (Jul 21)	C-MeX performance in Q1 2021-22	Jul-21	2.8
CX20	Customer experience insights	C-Mex Q2 Year 2 (2021-22) headlines: Customer Research & Insight (Oct 21)	C-MeX performance in Q2 2021-22	Oct-21	2.8
CX21	Customer experience insights	C-MeX Q3 Year 2 (2021-22) Headlines (Feb 22)	C-MeX performance in Q3 of 2021-22	Feb-22	2.8
CX22	Customer experience insights	Brand Survey (Q1 2021/22)	Summary of findings for Brand Survey in Q1 2021/22	Jun-21	2.3
CX23	Customer experience insights	Brand Survey (Q2 2021/22)	Summary of findings for Brand Survey in Q2 2021/22	Sep-21	2.3
CX24	Customer experience insights	Brand Survey (Q3 2021/22)	Summary of findings for Brand Survey in Q3 2021/22	Dec-21	2.3
CX33	Customer experience insights	D-MeX (Developer Services) 2021-22 Q2 Summary	Overall D-MeX performance in Q2 of 2021-22, performance metrics, service satisfaction	Dec-21	2.8

CX36	Customer experience insights	Thames Water Board and Customer Engagement Session on Leakage	Insights from leakage engagement activities	May-21	2.8
CX37	Customer experience insights	Leakage Website Report Testing (Jan 22)	Assessment of new customer facing leakage reporting website	Jan-22	2.8
CX42	Customer experience insights	Non household Smart Meters and Data Research (Jul 21)	Report on research on non-household customers' current engagement with water meters and data, water consumption data, attitudes to receiving additional data service from TW	Jun-21	2.7
CX45	Customer experience insights	Thames Water Board and Customer Engagement Session on Leakage (Jul 20)	Insights from online customer leakage research	Jul-20	2.8
CX56	Customer experience insights	Submit Meter Reading	Insights & recommendations from testing new meter reading submission method	Sep-21	2.4
CX63	Customer experience insights	Thames Water Customer Voices Key Insights 2021-2022	Key stats on polls and forums run throughout 2021-22	Jan-22	2.9
CX64	Customer experience insights	CCW Research Report Water Matters 2021-2022 - Summary of research findings for Thames Water	Results from Water Matters survey specific to Thames Water	n/a	2.4
CX68	Customer experience insights	Water Recycling Communications: Qualitative findings	Report on qualitative findings from Thames Water water recycling communications testing	Jun-22	2.9
CX85	Customer experience insights	Water Club: Changes of Sources	Research report to review existing evidence., and identify and fill knowledge gaps about attitudes towards water source change	Jun-22	2.9
CX86	Customer experience insights	Research Summary Form - Developer Scrutiny Panel	Summary of panel which sought to understand Update on where we are in our business planning process, corroborate understanding of needs and wants, understand priorities in terms of addressing resilience – areas for improvement	Sep-22	1.5
CX87	Customer experience insights	Water efficiency campaign evaluation	Research to assess how well 2022 WEFF campaign achieved its objectives and to highlight areas for improvement for future waves of the campaign	Aug-22	2.4
CX89	Customer experience insights	C-MeX CES and Brand Survey Insights Q2 2022-2023	Summary of findings for Brand Survey in Q2 2022-2023	Sep-22	2.4
CX104	Customer experience insights	Thames Water perception & behaviour research	Focus groups with Thames Water customers to elicit perceptions of Thames Water and the industry more	May-23	2.2

			widely, as well as their views and support for solutions to reduce water consumption.		
CX106	Customer experience insights	Thames Water Customer Voices Polls - Key Insights 2021-2022	Customer polls to gather high level views on a range of topics.	May-23	1.7
CX110	Customer experience insights	CCW Water Matters 2022 (Thames Water Results and full data report)	Thames Water's results of CCW's annual customer survey on people's satisfaction with various elements their water and wastewater service	Apr-23	2.6
CX113	Customer experience insights	Vulnerability Deep Dive research	In-depth research with vulnerable customers to gain a better understanding of their circumstances and needs.	May-23	2.9
CX114	Customer experience insights	C-MeX CES and Brand Survey Insights Q4 2022-2023	Summary of findings for Brand Survey and C-MeX in Q4 2022-2023	Mar-23	2.1
CX120	Customer experience insights	C-MeX CES and Brand Survey Insights Q1 2023-2024	Summary of findings for Brand Survey and C-MeX in Q1 2023-2024	Jul-23	2.1
R10	External Research	UKSCI January 2022 Results – Utilities Sector Resource Pack	Excel spreadsheet on all-sector overview, satisfaction trends, Y-o-Y changes, customer priorities and range of scores, channels, balance of price and service, right first time and complaints, contact type, key metrics by organisation, demographics	Jan-22	1.8
R13	External Research	CCW WaterVoice Window 4 Summary Report	Summary report of CCW WaterVoice session on climate change on water industry	Jun-20	2.6
R14	External Research	CCW + Ofwat Customer Spotlight Report - Peoples' views and experiences of water	Joint report from CCW and Ofwat on people's view and experiences of water	Apr-22	2.8
R15	External Research	CCW + Ofwat Customer preferences research	Joint report from CCW and Ofwat on customer preferences, including customer ranking of draft performance commitments	Apr-22	2.4
R37	External Research	CCW Sink Sense: Kitchen sink habits caught on camera	Research to understand the difference between what consumers say about their kitchen sink habits and what they actually do, using motion-sensitive cameras	Jun-21	1.7
R40	External Research	CCW Water Matters Highlights Report 2021	CCW's annual Water Matters survey tracks the views of household customers on the services they receive from water companies in England and Wales	Jul-22	2.3
SP1	Strategic planning	WRSE – Drought Communication Research – Quant (Jun 21)	Drought communications research – quantitative findings on understanding attitudes and perceptions of drought to help develop drought communications	Jun-21	2.8

SP3	Strategic planning	WRSE Workshop 1 – Data review (Annex from full workshop document) (Jan 22)	Presentation on BritainThinks research on attitudes to water sources	Jan-22	2.1
SP5	Strategic planning	Water Supply System Resilience Programme – Customer Research (Qualitative Findings) (Dec 20)	Summary of qualitative phase of customer research into customer attitudes to resilience	Dec-20	2.9
SP6	Strategic planning	Water Supply System Resilience Programme – Customer Research (Quantitative Findings) (Jan 2021)	Summary of quantitative phase of customer research into customer attitudes to resilience	Jan-21	2.8
SP12	Strategic planning	Vision 2050 Research	Summary of customer support on Thames Water Vision 2050 goals	May-22	2.9
SP14	Strategic planning	WRSE Water resources Quant Research	Results of quant survey of household and non-household customers around water resource options	Jun-22	2.7
SP19	Strategic planning	Best Value Criteria – Customer Research	Quantitative research to provide customer preference weights for the WRSE best value criteria	May-21	2.7
SP21	Strategic planning	Thames Water WRMP Customer Consultation	Research with customers on the proposed WRMP to ensure the solutions proposed are acceptable, in light of potential impacts on the environment, local communities as well as the bill impact for customers.	May-23	2.7
SP22	Strategic planning	WRSE Customer Research Regional Plan Preferences Thames Water Summary Report	Findings for Thames Water household customers from research conducted by WRSE that examined preferences for the balance of the regional plan in terms of reducing demand for water, developing new schemes, and bill impact.	Jun-23	2.6
S3	Stakeholder and community insights	Water Efficiency Strategy 2.0 - 1st Consultation Responses (Jul 21)	Results of survey for first consultation on Water Efficiency Strategy 2.0, to be published in summer 2022	Jul-21	2.2
S8	Stakeholder and community insights	PR19 Summary of Stakeholder Engagement (Apr 19)	Summary of stakeholder engagement undertaken for PR19 business plan	Apr-19	1.8
S9	Stakeholder and community insights	Research summary form - PR24 GLA sessions	Summary of feedback forms from GLA undertaken for PR24 enhancement cases	Mar-22	1.3
S11	Stakeholder and community insights	PR24 feedback form GLA (Water)	GLA feedback form for PR24 Water enhancement cases	Mar-22	1.9
S12	Stakeholder and community insights	PR24 feedback form London First (Water & Wastewater)	London First feedback form for PR24 Water and Wastewater	Mar-22	2.0
S14	Stakeholder and community insights	Stakeholder Reputation Research (Mar 22)	Summary of stakeholder reputation research including perceptions of the water industry and Thames Water	Mar-22	2.9

S18	Stakeholder and community insights	Research Summary Form - Local Government	Summary of feedback from Local Government on their issues, areas for improvement, wants and needs, and longer term aspirations	Jun-22	1.8
S19	Stakeholder and community insights	Research Summary Form - Insurance Stakeholders	Summary of feedback from Insurance Partners on their issues, areas for improvement, wants and needs, and longer term aspirations	May-22	2.1
S20	Stakeholder and community insights	Research Summary Form – Communities impacted by Capital Delivery	Summary of feedback from capital delivery partners on their issues, areas for improvement, wants and needs, and longer term aspirations	Jun-22	1.8
S38	Stakeholder and community insights	Elected representative issues tracker	Tracker of concerns raised by political stakeholders with Thames Water which could have a negative impact on perceptions/reputation.	Mar-23	1.2
S39	Stakeholder and community insights	Stakeholder Reputation Research	In-depth interviews with a range of stakeholders to better understand how they perceive Thames Water and identify any risks to relationships/reputation.	Mar-23	2.9
S41	Stakeholder and community insights	Research Summary Form - Berkeley Group	Summary of feedback from a developer on their issues, areas for improvement, wants and needs, and longer term aspirations	Jun-22	2.1
PR24-1	PR24	PR24 Foundation Research – An analysis of customer views and expectation of Thames Water (Nov 21)	Summary of research designed to validate Sia Partners WCCSW: large scale social listening, ethnographic videos, online communities	Nov-21	1.8
PR24-2	PR24	PR24 Foundation Research – Customer Voices (Nov 21)	A more detailed report on the Customer Voices (online community) section of the PR24 Foundation Research	Nov-21	2.8
PR24-3	PR24	PR24 Foundation Research – Social media analysis	Detailed report on the Twitter section of the PR24 Foundation Research	Nov-21	1.8
PR24-7	PR24	Deep Dive: Sustainable Abstraction (Feb 22)	Sustainable abstraction deep dive research report	Feb-22	2.8
PR24-8	PR24	Deep Dive: Lead Pipes (Feb 22)	Lead pipes deep dive research report	Feb-22	2.8
PR24-10	PR24	Deep Dive: Trunk Mains and Replumb London (Feb 22)	Trunk mains and replumb London deep dive research report	Feb-22	2.7
PR24-11	PR24	PR24 Foundation Research: What is important to Future Bill Payers and Business Customers	Results and presentation of online community survey undertaken at early stages of Vision 2050 research	May-22	2.6
PR24-12	PR24	PR24 Enhancement package options Research Full Report	Research to explore and understand how customers weigh up ‘packages’ of enhancement propositions brought together from different service areas, including how they weigh up timeframe vs bill	Sep-22	2.8

PR24-14	PR24	Acceptability and Affordability Testing (Qualitative findings)	Qualitative Acceptability and Affordability Testing with customers with different PR24 business plans	May-23	3.0
PR24-15	PR24	Enhancement cases deep dive research	Qualitative and quantitative research with customers to test customer support for 8 specific proposed investment areas.	May-23	3.0
PR19-4	PR19	CR19 Intergenerational fairness, CCWater (Oct 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg60, pg71	Oct-16	2.0
PR19-6	PR19	CR26a Deep dives, interruptions to supply, BritainThinks (Sep 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg40	Sep-16	2.0
PR19-7	PR19	CR26c Deep Dives, Odour BritainThinks	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg86, pg87	Sep-16	2.0
PR19-10	PR19	CR26d Deep Dives, sewer flooding and blockages, BritainThinks	Existing Insight from What Customers Want for PR19 Business Plan, WCW pg53	Oct-16	2.0
PR19-11	PR19	CR26e Deep dives, water hardness, BritainThinks (Sep 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg49	Sep-16	2.0
PR19-13	PR19	CR32 Being a good neighbour, BritainThinks (Mar 2017)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg82, pg83, pg84, pg85	Mar-17	2.0
PR19-14	PR19	CR41 Stage 1 Customer preferences research, effect/ICS (Apr 2017)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg36, 37, 57	Apr-17	2.0
PR19-15	PR19	CR43a/b Stage 2 customer preferences research - water resources level of service and options, effect/ICS	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg61, 62	May-17	2.0
PR19-18	PR19	CR43e Stage 2 customer preferences research - water services. effect/ICS (May 2017)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg47	May-17	2.0
PR19-19	PR19	CR52 Resilience Deep Dive, BritainThinks (Feb 2017)	Existing Insight from What Customers Want for PR19 Business Plan, WCW pg60, 66, 68, 81	Feb-17	2.0
PR19-31	PR19	CX25 Customer Expectations (May 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW pg54	May-16	2.0
PR19-39	PR19	CX42a/b Water efficiency campaigns, Populus (May 2018)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg65	2017-2018	2.0
PR19-43	PR19	EX03 Consumer attitudes to tap water, CCWater (2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg38	2016	2.0
PR19-45	PR19	EX13 Water saving, CCWater	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg61, 62, 65	Oct-17	2.0

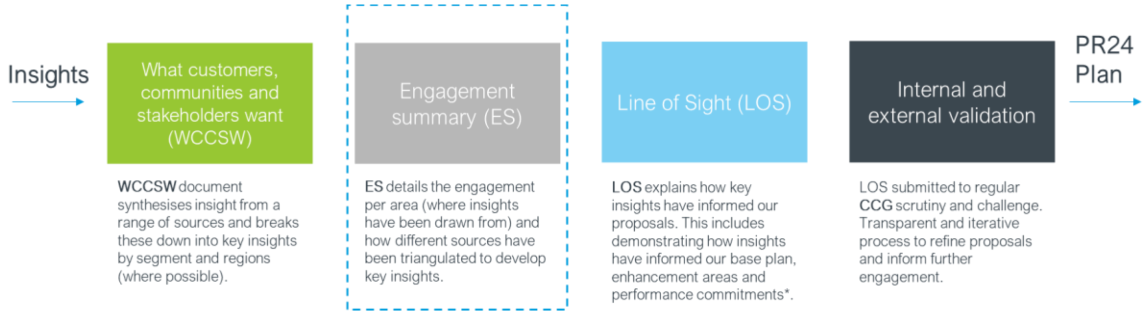
PR19-51	PR19	EX01 Tap water avertive study (2013)	Existing Insight from What Customers Want for PR19 Business Plan,	2013	2.0
PR19-53	PR19	CR26f Deep Dives, Water Pressure (Sep 2016)	Existing Insight from What Customers Want for PR19 Business Plan,	Sep-16	2.0
PR19-55	PR19	PV01 Water Resources Follow up (2013)	Existing Insight from What Customers Want for PR19 Business Plan,	2013	2.0
PR19-57	PR19	Hatton Garden Streetworks, Populus (May 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 84	May-16	2.0
PR19-58	PR19	CR29a WRMP Stage 1, (BritainThinks, Oct 16)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 60, 64, 65 & 95	Oct-16	2.0
PR19-59	PR19	CR03 TTT customer understanding, Populus, (Mar 2018)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 60, 66 & 68	Mar-18	2.0
PR19-60	PR19	CX34 Enfield Metering, Populus, July 2016	Existing Insight from What Customers Want for PR19 Business Plan,	Jul-16	2.0
PR19-61	PR19	CR69 Drought Resilience & Chalk Streams, BritainThinks, Mar 19	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 64 & 78	Mar-19	2.0
PR19-62	PR19	CR67 NE London Resilience, eftec/ICS, Jan 19	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 60 & 75	Jan-19	2.0

Wastewater Engagement Summary

Purpose

The purpose of the Engagement Summary (ES) is to provide an overview of the customer, community and stakeholder engagement undertaken for each core strategy area of the PR24 business plan (water, wastewater and customer service).

It is intended to sit between the programme wide 'What Customers, Communities and Stakeholders Want' (WCCSW) and the Line of Sight (LOS) sections in various documents across the business plan.



It sets out the details of the key insights derived from the PR24 engagement programme and how different sources have been triangulated to inform these.

This aims to provide a clear and transparent view of the robustness of engagement evidence linked to each topic, any tensions in views and how these have been addressed.

This document serves as the Engagement Summary for Wastewater. It is comprised of three main parts:

- Key insights to inform our Wastewater strategy from customer, community and stakeholder engagement and the key sources of engagement used
- Triangulations of Insights - documentation of the robustness of evidence supporting each key insight and any tensions or divergence in views between groups or regions
- List of sources and triangulation robustness / weighting scores

Key insights used to inform our Wastewater strategy

This section provides a summary of the key insight sources we have drawn upon in our engagement for Wastewater. This includes our previous insight sources from PR19, ongoing customer insight and community/stakeholder engagement activities, our strategic long-term plans and our PR24 Business Plan targeted engagement.

The table below summarises the key insights for Wastewater that we have drawn from What Customers, Communities and Stakeholders Want (v18.3) and the engagement summary that follows. This includes a list of key sources used to derive each key insight. The full list of sources used is then included, listing sources and triangulation robustness / weighting scores.

ID	Key Insight	Key Sources
WS1	**For Customer /** I want you to prevent sewer flooding and take waste away safely	
Wastewater network resilience		CX24, CX62, CX64, CX65, CX81, CX89, CX110, CX120 R41 PR24-1-PR24-3, PR24-9, PR24-11 S1, S8, S14, S18, S20, S35 SP7- SP10, SP12, SP16, SP20 PR19-9, PR19-38
Sewer flooding		CX64, CX110 PR24-1, PR24-9, PR24-12, PR24-14, PR24-15 SP12, SP16, SP20 S38
Blockages		CX43, CX70, CX104 R37 PR19-9 PR24-1 S8, S26 SP9
WS2	**For the Environment /** I want you to stop polluting rivers and to improve their quality*	
River health		CX29, CX64, CX88-CX89, CX110 R29 PR19-8

		PR24-2, PR24-3, PR24-5, PR24-6, PR24-12, PR24-14, PR24-15 S14, S38, S39 SP6, SP9-SP12, SP16, SP20
WS3	**For the Environment /** I want you to reduce emissions and reach net zero*	
Net zero carbon		CX22, CX23, CX89, CX114, CX120, CX122 R13, R16 PR19-16 PR24-3, PR24-4, PR24-11, PR24-14 S7, S39 SP7, SP9, SP12, SP20

**ENV1. I want you to reduce your impact and restore the environment* cuts across the other wants within ‘For the Environment’

Triangulation of insights for Wastewater

In this section we provide further detail on each key insight including an assessment of the robustness of evidence and a summary of any divergent views. A further assessment of source robustness is then provided.

WS1. I want you to prevent sewer flooding and take waste away safely

/ Wastewater network resilience

Summary

Customers want to be able to rely on wastewater being taken away 24/7. They want the wastewater system to be proactively monitored, maintained and improved to ensure its reliability. Customers place significant weight on maintaining current service levels and there is some appetite for improved levels of service.

Customers and stakeholders expect reliability even in the face of more severe challenges that might threaten their wastewater service in the future, such as increased demand and changing weather patterns. They are positive about measures such as the creation of wetlands but say that solutions that will best cope with increased demand are more important than the options themselves.

Customers recognise the increasing need to invest in better wastewater infrastructure. Sustainable Drainage Systems and Green Infrastructure options, are both seen as good ideas. Customers are generally supportive of major wastewater infrastructure projects where they can be shown to deliver solid improvements and benefits for the future. Most would expect Thames to undertake this type of activity anyway and do not necessarily feel that they should pay more for such schemes.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP – WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

- Views are consistent on this topic; customers expect Thames Water to maintain and repair the wastewater network to ensure its reliability, with many even calling for improved levels of service.
- Customers and stakeholders expect that Thames Water continue to invest in their network and assets to ensure a resilient wastewater service into the future against pressures such as climate change and population growth.
- Customers and stakeholders expressed high levels of support for new sustainable (i.e., green) wastewater solutions i.e., SUDS as alternatives to building new 'grey' infrastructure, however, some expressed concerns around the cost impact.

Divergence/conflicting views:

- A few customers felt that as flooding is unpredictable and difficult to fully prevent, that other initiatives should be prioritised ('help disruptive rainwater flooding' was ranked 11th out of 19 Vision 2050 goals).
- Some felt timescales to achieve a resilient wastewater system were lacking and doubt Thames Water can deliver as promised.
- Men placed a lower priority on protecting the wastewater service from climate change than women.
- BME customers place a lower priority on preventing disruptive rainwater flooding than white customers.
- Stakeholders (community groups) called for Thames Water to operate its existing assets effectively and efficiently before looking to invest in new assets and infrastructure.
- There were higher levels of acceptability for DWMP amongst higher SEGs in London. Customers with higher incomes, and those who are aware of the need to upgrade sewage treatment works and of increasing flood risk were more likely to find the plan acceptable. Customers who belong to lower SEGs, had a higher current bill amount, and preferred a reduced scale of plan were least likely to find the bill acceptable.

Insight source robustness:

There is a strong evidence base of insight from various sources including DWMP quantitative and qualitative research and Vision 2050 Research, as well as engagement undertaken with our stakeholders and ongoing customer engagement. None of the evidence which was drawn upon to support the insight on this topic came from PR19 engagement sources.

WS1. I want you to prevent sewer flooding and take waste away safely

/ Sewer flooding

Summary

Customers prioritise improvements to reduce internal sewer flooding as they see this as having the greatest direct consequence or impact for households.

Customers think that sewer flooding in homes and other properties is particularly distressing and, despite only a very small minority of customers experiencing it, want to see ambitious plans to stop it happening completely.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Med
Regional differences	Med

Triangulation comment:

General message:

- Customers and stakeholders are in agreement that sewer flooding into or near properties represents a severe failure of the wastewater system and acknowledge the severe impacts it can have on those who are affected and want it stopped as soon as possible.
- In Vision 2050 research, customers ranked 'stop all sewage flooding into homes, gardens and businesses' 3rd of 19 Vision 2050 goals.
- Of Thames Water's core wastewater service improvement areas, 'Stop all sewage flooding into homes, gardens and business' is the highest (of 4) priority for customers.

Divergence/conflicting views:

- While sewer flooding in the home is by far the worst service failure for customers, environmental NGOs look at the overall risk picture, prioritising protection against the risk of wider impact on the environment such as river pollution.
- Further, while all customers view reducing sewer flooding as a high priority, those that have experienced sewer flooding into their properties, or know someone who has, place a higher value on improvements in this area than those that haven't been directly impacted by flooding previously, and therefore prioritise other initiatives.
- Some argue that reducing sewage floods shouldn't be classed as 'raising the bar', either because this should be part of standard service improvements or because relatively few people would benefit from it, given it is a relatively infrequent occurrence
- Around a half of customers are not satisfied with Thames Water's efforts to minimise the incidence of sewer flooding. White customers and customers living in the Thames Valley & Home Counties place a higher priority on eradicating sewer flooding than BME customers and customers living in London, respectively.

Insight source robustness:

Customer and stakeholder insight supporting this topic has come from key, robust evidence sources, including Vision 2050 research, PR24 enhancement package options research, DWMP research and PR24 Enhancement deep dives. No evidence from PR19 engagement was drawn upon to support the insight on this topic.

WS1. I want you to prevent sewer flooding and take waste away safely

/ Blockages

Summary

Customers are generally aware that many blockages are caused by improper disposal of waste down toilets and kitchen sinks, and have a high-level understanding of what shouldn't be disposed of.

However, detailed knowledge (i.e. the full range of waste types) are less well known and therefore customers would appreciate communications from Thames Water about this.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	Med
Divergence of view (by group)	Low
Regional differences	Low

Triangulation comment:

General message:

- Customers are generally in agreement that more needs to be done to address blockages and sewer flooding and acknowledge the significant role that avoiding improper disposal of household waste will play in achieving this.
- Customers have a generally low awareness of the role their behaviours play in preventing blockages, and there was unanimous support for greater information and education from Thames Water.

Divergence/conflicting views:

- Views tend to differ between customers and stakeholders in London and those in other areas. In addition to continuous education, customers in London tend to support the introduction of penalties for people causing blockages (in addition to education). Customers in London also prefer the communication on this topic via leaflet, as opposed to videos which are preferred by customers outside of London.
- Customers also call for more information and education on disposing household waste properly to avoid causing blockages, however, results from the Bin It Don't Block It (BIDBI) campaign found that many customers did not actually change their behaviour as a result.
- Stakeholders also called for us to work with children in schools and to do more work with partners to convey messaging to the public.
- Future customers especially have a low awareness of the BIDBI campaign.

Insight source robustness:

There is robust evidence to support the insight from customers and stakeholders, including DWMP research, PR24 foundation research and the BIBDI campaign research. Only one piece of evidence from PR19 engagement contributed towards the insight on this topic.

WS2. I want you to stop polluting rivers and to improve their quality

/ River health

Summary

Rivers are important to customers and they value reducing pollution incidents as the natural environment is important to them. Customers are to some extent forgiving of a one-off pollution incident as long as the environment can be restored, but they do not expect to see incidents happening more frequently. Awareness and concern around this topic has increased rapidly following negative media coverage, and customers' tolerance of the issue is decreasing.

Pollution incidents start to be seen as unacceptable when fish die or when untreated sewage is visible and smelly.

Customers and stakeholders want Thames Water to protect and improve the quality of rivers and the environment and want to see clean, well flowing rivers. Customers want Thames Water to ensure healthy rivers that support a wide variety of activities including wildlife, fishing and recreation including swimming.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	High
Divergence of view (by group)	Med
Regional differences	Med

Triangulation comment:

General message:

- Strong, consistent message across customers and stakeholders that pollution of rivers with untreated sewage is intolerable if it happens more than once a year and particularly in light of recent controversies in the media, attitudes towards water companies are generally negative.
- There is largely positive support for commitments to reduce and eliminate spills made by Thames Water.
- Customers are also generally aligned on the need for Thames Water to improve the quality of rivers and waterways; customers and stakeholders want Thames Water to do more to improve and maintain the health of rivers and habitats, for the benefit of wildlife as well for recreation purposes.

Divergence/conflicting views:

- Some customers revealed during Vision 2050 research that the goal of 'prevent heavy rainfall from causing sewage overflows and sewage spills into rivers' is less of a priority if they either do not live near a river or have not been directly impacted by it i.e., those living in urban areas.
- Older customers, women, white customers, and customers living in the Thames Valley & Home Counties all place a higher priority on keeping rivers clean i.e. reducing pollution incidents.
- NGOs were particularly positive towards the continued commitment that Thames Water has to water courses and the natural environment, whereas the majority of customers are dissatisfied with Thames Water's cleaning of wastewater prior to releasing it back into the environment.
- Customers who did not live near to or use rivers frequently i.e. those living in urban areas felt this issue was less of a priority to them personally.
- Older customers, women, white customers and customers living in the Thames Valley & Home Counties place prioritise keeping rivers clean and healthy i.e. cleaning up rivers.
- Customer views on the acceptability of spills were more mixed, with no single perspective representing a majority view. Around half of respondents overall stated that spills were acceptable in circumstances where they were either: (i) kept to a minimum; or (ii) there was no harm to the environment. 1 in 3 DWMP respondents believed spills unacceptable in principle. This view was slightly stronger in the Thames Valley & Home Counties area

compared to London for household respondents, and slightly stronger for household respondents compared to non-households.

Insight source robustness:
There was a robust body of evidence from a range of sources which was drawn upon to support the insight on the topic. Key sources included external research, PR24 foundation research and Enhancement deep dives, Vision 2050 research, PR24 enhancement package options research, DWMP research, and qualitative customer research. PR19 engagement did not contribute any evidence to support the insight on this topic.

WS3. I want you to reduce emissions and reach net zero

/ Net zero carbon

Summary

Customers across all segments support most decarbonisation initiatives proposed by Thames Water.

Customers say we should use renewable energy but don't support increased charges to pay for it.

Thames Water's commitment to carbon neutrality had particularly strong traction with the public.

Key evidence sources*	
PR24 foundation research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 enhancement package options research
WRMP - WRSE	Other external research
Stakeholder reputation	Stakeholder bilaterals
Acceptability and Affordability Testing	Vulnerability Deep Dive

*Evidence sources are highlighted where customer and stakeholder insight from those sources has been included for this topic.

Insight Triangulation	
Evidence robustness	Med
Divergence of view (by group)	Med
Regional differences	Low

Triangulation comment:

General message:

- Customers across all groups are generally aligned in their support for decarbonisation and renewable energy initiatives proposed by Thames Water. They were generally pleased about the relatively low bill impact associated with achieving net zero.
- Customers generally have a low awareness of how water companies may impact climate change in the future, however, customer awareness of Thames Water's climate-change orientated initiatives has picked-up with regards to its focus on renewable energy.

Divergence/conflicting views:

- Future customers were more concerned than other customer groups about reducing emissions and reaching net zero.
- Customers views' differed on whether achieving net zero by 2030 is too slow or about right and half are not confident water companies will achieve this at all.
- Women place a higher priority on Thames Water producing more renewable energy than men.
- Stakeholders support water companies' regional planning intention on the achievement of net zero as soon as possible.
- Customer views are mixed on the pace of Thames Water achieving net zero - around a quarter of customers think the 2030 net zero target for UK water companies is about right, and around a third think companies should bring their emissions to zero earlier than 2030.
- Fewer than half of customers are confident that water companies will achieve net zero by 2030.

Insight source robustness:

- Evidence for this topic is limited relative to others, however, there are a number of key evidence sources which contribute to the insight on this topic, including Vision 2050 research, PR24 enhancement package options research, PR24 Foundation research and Enhancement deep dives. One piece of evidence from PR19 engagement was used to inform the insight on this topic.

List of sources and triangulation robustness / weighting scores

Approach to weighting evidence sources

In this section we will provide an overview of the evidence scoring system based on 'The Magenta Book' – guidance for qualitative evaluation by the UK Government:

The 3 categories for evaluation of engagement sources are:

- Methodologically sound
- Rigorously gathered
- Credibly interpreted

A 'contributory score' is also given to each insight, from each event, to evaluate its relevance to a certain topic (service area).

These categories for engagement events are scored according to their requirements, then an average 'Overall Score' is established for each source. An outline of each category's scoring requirements is in the table below.

Score	Insight source scoring			Feedback scoring
	Methodologically sound	Rigorously gathered	Credibly interpreted	Contributory score
1	Limited or no methodology, unplanned with no aim or objective.	Limited discussion of data collection technique, who collected the data, or the procedure for recording differing opinions.	Lack of credible interpretation with potential for bias. Limited or no discussion of feedback points in the conclusion.	Vague, high-level feedback with only a tangential relevance to the topic in question.
2	Some aims of engagement, but limited discussion of sampling, knowledge levels and stakeholder backgrounds.	Some discussion of data collection and the methods. Limited depth of feedback and range of opinions.	Some link and discussion of the engagement details in the event report, including some differing views.	Feedback not necessarily fully aligned to the topic and only provides a limited insight and thus moderately useful.
3	Clear aims, sound sampling methodology and consideration of barriers to inclusion.	Thorough discussion of data collection procedures, noted a range of perspectives and	Engagement work interpreted accurately and fairly with detailed outline of all perspectives and issues discussed.	Specific, clear and relevant information with clear link to the topic discussed. High value added.

		extensive detail of feedback.		

Quality indicators	Description	Questions
Contributary evidence	Contributory in advancing wider knowledge or understanding about the topic	How closely linked is the feedback to the specific output being evidenced? ▪ Is the information valuable for business planning purposes? ▪ Does this information confirm what I already know about my customers? ▪ If no what explains the discrepancy? ▪ If no, does it give me an alternative perspective? ▪ If yes, how should I adapt my analysis of customer preferences? ▪ Does the evidence support claims for wider inference?
Methodologically sound	Defensible in design by providing a research strategy that can address the evaluation question posed	How well was the engagement/research conducted compared to best practice principles? ▪ What sorts of questions does this method answer? ▪ Are any of the methods applied less well established, new or innovative? If yes, do I need to establish how sound these methods are? ▪ Has the methodology been appropriately adapted and refined for the specific purpose for which it has been used? ▪ Is it clear that good practice is followed?
Rigorous data collection	Rigorous in conduct through systematic and transparent collection, analysis and interpretation of qualitative data	Did the engagement work with significant volume? Was the evidence captured effectively? ▪ How was data gathered? ▪ Were best practice methods applied for gathering the data ▪ Is the collected data detail rich and in-depth?
Credible analysis and interpretation	Credible in claim through offering well-founded and plausible arguments about significance of the evidence generated	How credibly/independently was the evidence evaluated? How does the interpretation ensure the avoidance of bias? ▪ Was the context of the engagement provided? ▪ Are there biases to be aware of which may not have been mitigated by the methodology? ▪ Does the evidence provide multiple perspectives and alternative positions?

List of evidence sources for Water

A list of sources that have been used to derive insights for the area and the overall source weighting score for each.

Source Ref	Source Group	Source Name	Description	Date	Overall Score
CX1	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Nov 21)	Customers service by business area including latest service and brand insights, business area service summaries (Nov 21)	Dec-21	2.4
CX2	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 21)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 21)	Jan-22	2.4
CX3	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 20)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 20)	Jan-21	2.4
CX4	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jan 21)	Feb-21	2.4
CX5	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Feb 21)	Customers service by business area including latest service and brand insights, business area service summaries (Feb 21)	Mar-21	2.4
CX6	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Mar 21)	Customers service by business area including latest service and brand insights, business area service summaries (Mar 21)	Apr-21	2.4
CX7	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (April 21)	Customers service by business area including latest service and brand insights, business area service summaries (Apr 21)	May-21	2.4
CX8	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 21)	Customers service by business area including latest service and brand insights, business area service summaries (May 21)	Jun-21	2.4
CX9	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints(Jun 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jun 21)	Jul-21	2.4
CX10	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jul 21)	Customers service by business area including latest service and brand insights, business area service summaries (Jul 21)	Aug-21	2.4

CX11	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Aug 21)	Customers service by business area including latest service and brand insights, business area service summaries (Aug 21)	Sep-21	2.4
CX12	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Sep 21)	Customers service by business area including latest service and brand insights, business area service summaries (Sep 21)	Oct-21	2.4
CX13	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Oct 21)	Customers service by business area including latest service and brand insights, business area service summaries (Oct 21)	Nov-21	2.4
CX14	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 22)	Customers service by business area including latest service and brand insights, business area service summaries (Jan 22)	Feb-22	2.4
CX18	Customer experience insights	C-MeX Year 1 Review: Customer Research & Insight (May 21)	C-MeX performance in 2021	May-21	2.8
CX19	Customer experience insights	C-MeX Q1 Year 2 (2021-22) headlines: Customer Research & Insight (Jul 21)	C-MeX performance in Q1 2021-22	Jul-21	2.8
CX20	Customer experience insights	C-Mex Q2 Year 2 (2021-22) headlines: Customer Research & Insight (Oct 21)	C-MeX performance in Q2 2021-22	Oct-21	2.8
CX21	Customer experience insights	C-MeX Q3 Year 2 (2021-22) Headlines (Feb 22)	C-MeX performance in Q3 of 2021-22	Feb-22	2.8
CX22	Customer experience insights	Brand Survey (Q1 2021/22)	Summary of findings for Brand Survey in Q1	Jun-21	2.3
CX23	Customer experience insights	Brand Survey (Q2 2021/22)	Summary of findings for Brand Survey in Q2	Sep-21	2.3
CX24	Customer experience insights	Brand Survey (Q3 2021/22)	Summary of findings for Brand Survey in Q3	Dec-21	2.3
CX29	Customer experience insights	Thames Water Customer Voices Key Insights 2021-2022	Excel spreadsheet with key stats on polls and forums run throughout 2021-22	Jan-22	2.9
CX33	Customer experience insights	TW D-MeX (Developer Services) 2021-22 Q2 Summary (Dec 21)	Overall D-MeX performance in Q2 of 2021-22, performance metrics, service satisfaction	Dec-21	2.8
CX36	Customer experience insights	Thames Water Board and Customer Engagement Session on Leakage (May 21)	Insights from leakage engagement activities	May-21	2.8
CX43	Customer experience insights	Bin it, don't block it' Behaviour Research (Jul 21)	Bin it, don't block it' Behaviour Research	Jul-21	2.8
CX45	Customer experience insights	Thames Water Board and Customer Engagement Session on Leakage (Jul 20	Insights from online customer leakage research	Jul-20	2.8

CX61	Customer experience insights	PR24 Service Survey Phase 1 Deep Dive Keywords	Summary of customer comments per customer area and journey	Feb-22	2.1
CX64	Customer experience insights	CCW Research Report Water Matters 2021-2022 - Summary of research findings for Thames Water	Summary of CCW Research Findings for Thames Water 2021-22	2021-22	2.4
CX66	Customer experience insights	C-MeX Q4 Year 2 (2021-22) Headlines (May 22)	C-MeX performance in Q4 of 2021-22	May-22	2.8
CX67	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 22)	Customers service by business area including latest service and brand insights, business area service summaries (April 2022)	May-22	2.1
CX73	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (June 22)	Customers service by business area including latest service and brand insights, business area service summaries (May 2022)	Jun-22	2.3
CX81	Customer experience insights	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (December 2022)	Customers service by business area including latest service and brand insights, business area service summaries (Dec 2022)	Dec-22	2.4
CX88	Customer experience insights	Brand Survey Q1 2022-23	Summary of findings for Brand Survey in Q1 2022-2023	Jun-22	2.4
CX89	Customer experience insights	C-MeX CES and Brand Survey Insights Q2 2022-2023	Summary of findings for Brand Survey in Q2 2022-2023	Sep-22	2.4
CX104	Customer experience insights	Thames Water perception & behaviour research	Focus groups with Thames Water customers to elicit perceptions of Thames Water and the industry more widely, as well as their views and support for solutions to reduce water consumption.	May-23	2.2
CX110	Customer experience insights	CCW Water Matters 2022 (Thames Water Results and full data report)	Thames Water's results of CCW's annual customer survey on people's satisfaction with various elements their water and wastewater service	Apr-23	2.6
CX114	Customer experience insights	C-MeX CES and Brand Survey Insights Q4 2022-2023	Summary of findings for Brand Survey and C-MeX in Q4 2022-2023	Mar-23	2.1
CX120	Customer experience insights	C-MeX CES and Brand Survey Insights Q1 2023-2024	Summary of findings for Brand Survey and C-MeX in Q1 2023-2024	Jul-23	2.1
CX122	Customer experience insights	Future Customers context	Research with future customers to better understand the issues that are important to them and the ways these evolve so that this can be taken into account for future business and strategic planning	Aug-23	2.6
SP6	Strategic planning	Water Supply System Resilience Programme - Customer Research (Quantitative Findings) (Jan 2021)	Summary of quantitative phase of customer research into customer attitudes to resilience	Jan-21	2.8
SP7	Strategic planning	DWMP Value Criteria Customer Preference Results (Sep 21)	Drainage and wastewater management plan quantitative survey results. Quantifying customer priorities for DWMP planning objectives and supplemental results	Sep-21	2.6

SP8	Strategic planning	DWMP - Customer Research: Part 2 Qualitative Research: Final Report (Oct 21)	Drainage and wastewater management plan qualitative research results	Oct-21	2.8
SP9	Strategic planning	Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report (Nov 21)	Report from Eftec detailing stakeholder engagement on long-term plan for draining and wastewater management plan	Nov-21	2.9
SP10	Strategic planning	Non-compliance in Sewage Treatment Works: Findings from qualitative research with customers (Dec 21)	Findings from a short-term online community on how customers feel about non-compliance with flow conditionals at sewage treatment works (whether this results in a spill) and if reparations should be made, and in what form	Dec-21	2.9
SP11	Strategic planning	Smarter Water Catchment Survey (Nov 21)	Summary of survey of customers around the River Crane to gather evidence of public knowledge of rivers	Nov-21	2.8
SP12	Strategic planning	Vision 2050 Research	Summary of customer support on Thames Water Vision 2050 goals	May-22	2.9
SP16	Strategic planning	DWMP Consultation Customer Research Summary Report	Summary of research to understand customer views on the DWMP in order to quantify the level of support for the plan, in terms of: i. Acceptability of the current preferred plan; and ii. Preference for current preferred plan vs. alternative plans	Sep-22	2.7
SP20	Strategic planning	DWMP consultation, You said we did	Summary of what customers and stakeholders said about the draft DWMP (dDWMP) during the formal public consultation process from 30th June – 22nd September 2022, and focuses on what has been done in response to the feedback we received, to directly enhance our final DWMP (fDWMP)	Feb-23	2.9
S1	Stakeholder and community insights	Stakeholder Asks (Feb 22)	Sheet summarising stakeholder engagement with LAs on reported issues and plans to resolve	Feb-22	1.4
S7	Stakeholder and community insights	Blueprint for Water Insights (Jul 21)	Summary of insights from Blueprint for Water, part of Wildlife and Countryside Link, a coalition of environmental, water efficiency, fisheries and recreational organisations that come together to form a powerful joint voice across a range of water-based issues.	Jul-21	2.1
S8	Stakeholder and community insights	PR19 Summary of Stakeholder Engagement	Summary of stakeholder engagement undertaken for PR19 business plan	Apr-19	1.8
S14	Stakeholder and community insights	Stakeholder Reputation Research	Summary of stakeholder reputation research including perceptions of the water industry and Thames Water	Mar-22	2.9
S18	Stakeholder and community insights	Research Summary Form - Local Government	Summary of feedback from Local Government on their issues, areas for improvement, wants and needs, and longer term aspirations	Jun-22	1.8
S20	Stakeholder and community insights	Research Summary Form – Communities impacted by Capital Delivery	Summary of feedback from customers and community groups impacted by capital delivery and major projects as well as other streetworks and work in the field	Jun-22	1.8

S26	Stakeholder and community insights	Research Summary Form - PR24 Youth session	Summary report to identify opportunities to engage with youth on the PR24 business plan, water efficiency, sewer misuse and climate related themes more broadly.	Jul-22	1.5
S35	Stakeholder and community insights	Ofwat Letter to CEOs - DWMP Consultation Response	Ofwat's industry overview of draft drainage and wastewater management plans 2022	Oct-22	2.8
S38	Stakeholder and community insights	Elected representative issues tracker	Tracker of concerns raised by political stakeholders with Thames Water which could have a negative impact on perceptions/reputation.	Mar-23	1.2
S39	Stakeholder and community insights	Stakeholder Reputation Research	In-depth interviews with a range of stakeholders to better understand how they perceive Thames Water and identify any risks to relationships/reputation.	Mar-23	2.9
R10	External research	UKSCI January 2022 Results - Utilities Sector Resource Pack	Excel spreadsheet on all-sector overview, satisfaction trends, Y-o-Y changes, customer priorities and range of scores, channels, balance of price and service, right first time and complaints, contact type, key metrics by organisation, demographics, 3 things to improve etc	Jan-22	1.8
R13	External Research	CCW WaterVoice Window 4 Summary Report	Summary report of CCW WaterVoice session on climate change on water industry	Jun-20	2.6
R16	External Research	MACRO4 - Utility Customer Research	Utility customer sentiment on key issues, including digital self-service, digital billing and environmental initiatives	Feb-22	2.8
R29	External research	CCWater Awareness and perceptions of river water quality	Summary report from CCW on water consumers' awareness and perceptions of river water quality	Apr-22	2.8
R37	External research	CCW Sink Sense: Kitchen sink habits caught on camera	Research to understand the difference between what consumers say about their kitchen sink habits and what they actually do, using motion-sensitive cameras	Jun-21	1.7
R41	External research	CCW Bridging the gap: Awareness and Understanding of Water Issues	Research to explore awareness of drought and hosepipe bans, river pollution from storm overflows, leakage and water company profits and dividends have intensified scrutiny of the sector and the extent to which they influence perceptions of their water company	Dec-22	2.0
PR24-1	PR24	PR24 Foundation Research - An analysis of customer views and expectation of Thames Water (Nov 21)	Summary of research designed to validate Sia Partners WCCSW: large scale social listening, ethnographic videos, online communities	Nov-21	1.8
PR24-2	PR24	PR24 Foundation Research - Customer Voices (Nov 21)	A more detailed report on the Customer Voices (online community) section of the PR24 Foundation Research	Nov-21	2.8
PR24-3	PR24	PR24 Foundation Research - Social media analysis (Nov 21)	A more detailed report on the Twitter section of the PR24 Foundation Research	Nov-21	1.8
PR24-4	PR24	Deep Dive: Net Zero (Feb 22)	Net zero deep dive research report	Feb-22	2.7
PR24-5	PR24	Deep Dive: Bathing Water (Feb 22)	Bathing water deep dive research report	Feb-22	2.8
PR24-6	PR24	Deep Dive: River Spills (Feb 22)	River spills deep dive research report	Feb-22	2.8

PR24-9	PR24	Deep Dive: Waste System Headroom	Waste system headroom deep dive research report	Feb-22	2.8
PR24-10	PR24	Deep Dive: Trunk Mains and Replumb London (Feb 22)	Trunk mains and replumb London deep dive research report	Feb-22	2.7
PR24-11	PR24	PR24 Foundation Research: What is important to Future Bill Payers and Business Customers	Summary report on future bill payers and business customers priorities and their awareness and attitudes towards Thames Water	May-22	2.6
PR24-12	PR24	PR24 Enhancement Package Options Research Full Report	Research to explore and understand how customers weigh up 'packages' of enhancement propositions brought together from different service areas, including how they weigh up timeframe vs bill	Sep-22	2.8
PR24-14	PR24	Acceptability and Affordability Testing (Qualitative findings)	Qualitative Acceptability and Affordability Testing with customers with different PR24 business plans	May-23	3.0
PR24-15	PR24	Enhancement cases deep dive research	Qualitative and quantitative research with customers to test customer support for 8 specific proposed investment areas.	May-23	3.0
PR19-7	PR19	CR26c Deep Dives, Odour BritainThinks (Sep 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg86, pg87	Sep-16	2.0
PR19-10	PR19	CR26d Deep Dives, sewer flooding and blockages, BritainThinks (Oct 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW pg53	Oct-16	2.0
PR19-13	PR19	CR32 Being a good neighbour, BritainThinks (Mar 2017)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg82, pg83, pg84, pg85	Mar-17	2.0
PR19-57	PR19	Hatton Garden Streetworks, Populus (May 2016)	Existing Insight from What Customers Want for PR19 Business Plan, WCW13 pg. 84	May-16	2.0

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