What Customers, Communities and Stakeholders Want

A summary of our customer, community and stakeholder insights

Version 18.3, September 2023

Contents

1 – Executive summary

- Overview of the key customer needs, initial prioritisation and areas of tension

2 - How to use this document

- The framework we have followed and what to look out for throughout the document

3 - Our customers

- Key stats about our customers and how we define customers, communities and stakeholders

4 - Summary of what our customers, communities and stakeholders want

- Overview of customer wants for each planning area broken down into topics
- Synthesised insight messages for key topics in the following planning areas:

  4.1 – for Customers – detailed insights

  4.2 – for Communities – detailed insights

  4.3 – for the Environment – detailed insights

5 - Demographic insights

- Summary of divergence in views and priorities between different demographic groups: age, gender, ethnicity, disability within household and across areas within Thames Water's region

6 - Segments – detailed insights

- Synthesised insight messages for vulnerable customers, businesses, retailers and developers

Appendix A – Insight sources

- A comprehensive list of all insight sources we have reviewed and our approach to weighting evidence

Appendix B – Prioritisation insights

- A view of customer priorities across various engagement areas, including key Wants, enhancement areas & Vision 2050

Appendix C – Acceptability and Affordability Testing

- Further detail on findings from qualitative research

1. Executive summary

WCCSW v18: what's new?

The overarching customer, community and stakeholder messages have been refined and consolidated and further substantiated by additional insights gathered between March and September 2023.

Additional insight

For WCCSW v18, we have added new insight from:

- PR24 Enhancement Case Deep Dive Research
- Acceptability and Affordability Testing, both Qualitative (May 2023) and Quantitative (August 2023) research
- 'Your Water, Your Say' session – May 2023
- Vulnerability Deep Dive Research
- DWMP and WRMP Consultations
- Further ongoing engagement with customers e.g. brand surveys, C-MeX etc. and our latest stakeholder reputation research
- Further emerging findings from external industry research
- Innovative tariff research
- Long-term delivery strategy research

This new insight has been triangulated with existing insight and is highlighted in red text throughout the document.

Key changes

- Updated the individual PR24 enhancement case summaries with new insights. We have also adjusted the customer prioritisation of enhancement cases following a triangulation of new research findings with the previous customer priority rankings.
- Included a summary of the findings from the qualitative Acceptability and Affordability Testing and provided summary slides for each of the tested performance commitments, which have been mapped to the relevant Outcomes and Topics.
- Included a summary of the key themes raised by customers from Thames Water's first Your Water, Your Say session in May 2023
- For version 18.3, the structure of the document has been updated to align customer Wants with the 3 new key pillars ('for Customers', 'for Communities' and 'for the Environment').

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

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

For Communities

CI1. I want you to have a positive impact on the community

For the Environment

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

Customer Wants and Performance Commitments

The outcomes we aim to deliver in AMP8 have been developed based on what our customers, communities and stakeholders want. We measure our delivery of these outcomes using performance commitments targets.

For customers

Want	I want an easy customer experience and tailored support
Performance Commitments	- C-MeX ; D-MeX ; BR-MeX
Want	I want fair and affordable bills
Want	I want safe, high quality drinking water
Performance Commitments	- Compliance Risk Index (CRI) - Customer contacts about water quality
Want	I want a reliable supply with minimal disruption
Performance Commitments	- Water supply interruptions - Mains repairs - Unplanned outage
Want	I want you to prevent sewer flooding and take waste away safely
Performance Commitments	- Sewer collapses - Internal sewer flooding - External sewer flooding

For communities

Want	I want you to have a positive impact on the community
Performance Commitments	Biodiversity Streetworks collaboration (bespoke)

For the environment

Want	I want you to reduce your impact and restore the environment
Want	I want you to fix leaks and ensure there is enough water in the future
Performance Commitments	- Leakage - Per capita consumption (PCC) - Business demand
Want	I want you to stop polluting rivers and to improve their quality
Performance Commitments	- Total pollution incidents - Bathing water quality - River water quality (phosphorous) - Discharge permit compliance - Serious pollution incidents - Storm overflows
Want	I want you to reduce emissions and reach net zero
Performance Commitments	- Operational greenhouse gases (water) - Operational greenhouse gases (wastewater)

Combined customer ranking of Wants

We have assigned a relative priority ranking of the 10 customer wants by triangulating scores from several sources where customers ranked priorities

Priority	Rank	Want
High priority	1	I want safe, high quality drinking water
	2	I want fair and affordable bills
	3	I want a reliable supply with minimal disruption
Medium priority	4	I want you to prevent sewer flooding and take waste away safely
	5	I want you to fix leaks and ensure there is enough water now and in the future
	6	I want you to stop polluting rivers and to improve their quality
	7	I want you to reduce your impact and restore the environment
Lower priority	8	I want you to reduce emissions and reach net zero
	9	I want an easy customer experience and tailored support
	10	I want you to have a positive impact on the community

Key: For customers (1, 2, 3, 4, 9); For communities (10); For the environment (5, 6, 7, 8)

Linked to our Vision 2050 themes

Combined customer ranking of enhancement areas

Customer Prioritisation

We have assigned a relative priority ranking of key enhancement areas* by triangulating scores from PR24 engagement sources where potential enhancement cases have been ranked. This includes the PR24 enhancement deep dives, PR24 enhancement package options research and Acceptability and affordability testing

Priority	Rank	Enhancement area	Category
High priority	1	Improving resilience to sewer flooding in homes	Resilience
High priority	2	Reducing risk of serious bacteria in drinking water	Compliance
High priority	3	Reducing sewage spills into rivers (WINEP)	Compliance
Medium priority	4	Water resources management	Compliance
Medium priority	5	Improving water supply resilience	Resilience
Medium priority	6	Reducing the amount of water we take from rivers (WINEP)	Compliance
Medium priority	7	Reducing risk of lead in drinking water	Compliance
Medium priority	8	Tackling groundwater sewer infiltration to prevent sewer overflows	Compliance
Medium priority	9	Improvements to providing alternative water supplies in an emergency (SEMD)	Compliance
Lower priority	10	Reducing our operational carbon emissions	Performance
Lower priority	11	Improving river health (WINEP)	Compliance
Lower priority	12	Reducing risk of basements flooding from trunk mains	Resilience
Lower priority	13	Making rivers safer for swimming and bathing (WINEP)	Compliance

1. For waste, reducing sewage flooding is customers' top priority for enhancement when combining all sources, however some believe we should also be doing more to address this in our base expenditure.
2. For water enhancements, improving water treatment and safety is a key priority for customers.
3. Reducing river spills is growing in importance for customers, potentially driven by recent media influence. Concerns were expressed around this worsening in light of external pressures.
4. Strong support from customers and addresses their concerns about future water supply
5. 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.
6. Customers reveal strong support for a low cost, important service enhancement that protects the environment.
7. Replacing lead pipes is seen as an area where we can have an individual impact (safety) and address societal needs (ageing infrastructure).
8. Reducing sewer spills as a result of infiltration is important for customers but there are some concerns about the longevity of the proposed enhancements
9. Customers agree that Thames Water have a responsibility to provide customers with water if supplies are disrupted, and feel it is important that emergency measures are in place
10. Reducing carbon emissions is seen as important but some customers view this as something all companies should be addressing as part of base expenditure, rather than as an 'enhancement'.
11. 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.
12. 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.
13. 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. There is more concern around the quality of the rivers that Thames Water extract from.

*The list provided only includes PR24 enhancement areas that have been tested directly with customers in relative prioritisation research for PR24. This is not a complete or final list of PR24 enhancement cases.

Summary of segmented customer views

Segmented Insights

We have engaged with a range of segments who make up and represent our customer base

Segment	Summary of views
Non-household / business customers	• Non-household customers are particularly concerned about issues which could impact the operation of their businesses, specifically supply interruptions and sewer flooding. • Non-household customers want and expect advance notification of planned outages, so they can plan ahead and minimise impacts. During unplanned interruptions, they expect communication and support, as well as reasonable compensation from Thames Water for lost trade. • Affordability and the cost of their water bills is of specific concern to businesses, and they express a desire for stable, predictable bills. There is therefore generally a high level of support for smart metering to help with financial forecasting and many are positive about the potential for access to consumption data.
Vulnerable customers	• We have learned that there are a broad spectrum of situations which might cause our customers to be considered vulnerable, and which impact how they use and rely on our service, as well as how they interact with us. • This group want us to better promote available financial and priority support and make the application process more straightforward. • They want Thames Water to ensure that our customer services are accessible to all and that we maintain a range of channels, both for them to contact us and for us to communicate with them. • Supply interruptions can have a larger impact on this group, particularly if they are reliant on certain medical equipment.
Future bill payers	• Future bill payers are generally less aware and less engaged with Thames Water in relation to both our core service as well as our wider community or environmental initiatives. This raises challenges relating to facilitating behaviour change – future customers are more likely to take their water supply for granted, for example, and therefore less likely to have already made efforts to reduce their consumption. • They express generally higher concern about issues relating to the environment, specifically reducing emissions and reducing our negative impact on rivers. • Future bill payers are generally not concerned about the affordability of their water bill and less engaged about water-related issues. A key area of concern (aside from climate change) relates to the ongoing cost of living crisis and their financial prospects i.e. buying/renting property. • Future customers are aware that a lack of action and investment in the water and waste network soon will mean they will inherit the majority of the burden of addressing issues further down the line.
Developers	• Developers value a positive relationship with Thames Water and want to see greater collaboration and co-ordination between Thames Water and other relevant parties. They have highlighted several areas for improvement. For example, they express the importance of ensuring proactive communications and updates, providing a dedicated point of contact, and ensuring transparency across dealings with Thames Water. • They also ask for improvements to the efficiency of application processes, reduction in time taken to resolve issues and complete works, and better value for money for services provided by Thames Water.
Retailers	• Retailers' main priorities relate to accuracy of billing for their customers; they want to see an increase in the roll-out of smart meters and improved accuracy / quality of data and better access to their customers' data for this purpose, as well as recognising the potential benefits associated with reduced water consumption.

Detailed insights from the customer segments above can be found in Section 6

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.

- Alongside the key insight tensions identified on slide 11, additionally 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 are provided on each of the detailed insights slides to 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).

- We have also provided a summary of the divergence of views on different topics across different customer groups, as well as any difference in view between customers living in the Thames Valley & Home Counties and customers in London. These can be found here.

Key areas of insight tensions

Key tensions emerge when customers, communities and stakeholder views do not align. These tensions largely stem from customers prioritising individual impacts such as bill increases or in-home sewer flooding over wider societal impacts such as environmental damage.

For Customers	• 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. • Future bill payers have a higher preference for solutions which they see as tackling the issue as soon as possible e.g. replacing trunk mains or investing quickly to reduce major supply interruptions, as they are aware they will otherwise inherit these issues. • Future, vulnerable and business customers are less supportive of the idea of collecting water or being provided with bottled water due to the respective issues around practicality and sustainability. • Sewer flooding in the home is by far the worst service failure for customers, who see preventing such flooding as a top priority. Environmental NGOs look at the overall risk picture, and balance flooding protection against the risk of wider impact on the environment such as river pollution. • Compared to households, non-household customers place a greater emphasis on enhancement areas that can reduce the risk of potential financial impact on their business, such as preventing sewer flooding.
For Communities	• Customers and stakeholders are broadly aligned on the need to do more for the benefit of wider society. However, stakeholders tend to place a greater emphasis on larger and long-term initiatives.
For the Environment	• Customers give lower priority to environmental initiatives (protecting or improving the environment) compared to reliable water and wastewater services. Stakeholders, particularly environmental NGOs, seek a balanced focus on improving core service and simultaneously delivering positive environmental impact. • Non-household customers place a lower priority and express less support for bill increases to reduce wastewater pollution into rivers, compared with household customers. • Customers want a resilient water supply that is ready to meet future demand, and they want investments in solutions to deliver security of supply to be cost effective. Some environmental groups prioritise limiting environmental damage over considerations of cost. • Stakeholders want Thames Water to explore a range of short- and long-term interventions to improve supply, but (in contrast to customers' steer) progress these interventions simultaneously rather than sequentially. • Customers want us to prioritise improving our existing service (through reducing consumption and leakage) ahead of finding new water resources. Given forecast population growth, non-household customers and stakeholders welcomed focussing on both at the same time. • Stakeholders from Local Government and community groups want Thames Water to go further and 'remove' rather than 'reduce' the strain on rivers and want Thames Water to work collaboratively where it helps to achieve this. Customers tend to prioritise core services and have concerns over short term bill impacts. • Compared with household customers, stakeholders place greater emphasis on the importance of engaging with children and the wider community on issues such as water efficiency and sewer abuse to embed behaviour change. • Over 50% of household customers supported more stringent storm overflow targets at added cost (in bills) to customers. This level of support reduced if added investment came at the expense of efforts to reduce flooding. On the contrary, non-household customers expressed higher levels of support for more stringent storm overflow targets, even if it resulted in higher bills / came at expense of efforts to reduce flooding. • Customers showed a clear preference for an even paced delivery profile for the DWMP (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.

PR24 Acceptability and Affordability Testing (1/4)

We have provided a summary of the findings from the **qualitative** phase of testing of our draft PR24 business plan, which took place in May 2023

Proposed plan	**3 in 4** customers found the plan acceptable	• Plan begins to address some of the environmental concerns, includes targets going in the right direction, tackles leakage and future water security/infrastructure issues which are a key concern due to population growth and climate change.
	Just under half of customers found the plan affordable, with 1 in 3 finding it difficult to afford	• More find the Proposed Bill impacts fairly/very difficult to afford and want to know whether there will be bill caps or exclusions to protect those who need support.
Must Do Plan	**Just over half** found the plan acceptable (70% of non-household customers found it acceptable)	• Lower acceptability driven by perceived lack of proactivity with Thames Water focusing only what is mandatory which feels shortsighted for some – minimal cost reduction does not justify losing investment in three discretionary areas. • Customers were also split on their views towards certain aspects of the plan e.g. benefit for future generations.
	Half found the plan affordable, with 2 in 10 finding it difficult to afford	• There is a minimal difference in costs between Proposed and Must Do Plans. • Proportion and distribution of affordability is not different between the two plans.
Alternative plan	**Almost 3 in 5** found the plan acceptable	• Acceptability was slightly higher than the Must Do Plan, but significantly lower than the Proposed Plan. • It was observed that customers who preferred this plan tended to be less environmentally focussed. • The Alternative Plan focussed on a slower reduction in phosphorous under NEP – Waste enhancement; customers who accepted this plan were comfortable with the slower reduction and the slightly lower short-term cost.
	Half found the plan affordable, with just over a quarter finding it difficult to afford	• Customers were focussed on the reduced short-term bill impact, despite the higher longer-term bill impact. • The proportion and distribution of affordability is similar across Proposed, Must do and Alternative plans indicating that customers did not find the price differences vs. service enhancements different enough.

Source: PR24-14 Acceptability and Affordability Testing Qualitative Findings, May 2023
More detailed findings from AAT on each version of the plan can be found in the Appendix

PR24 Acceptability and Affordability Testing (2/4)

We have provided a summary of the findings from the **qualitative** phase of testing of our draft PR24 business plan, which took place in May 2023

Concluding remarks:

1. Preference for the Proposed Plan is driven by strong support for service enhancements that address spontaneous concerns around key environmental wastewater issues relating to CSOs and river pollution, as well as investment to address longer term water security challenges and leakage. The Proposed Plan provides some reassurance that Thames Water will proactively invest to future proof core infrastructure and ensure longer term network resilience

2. This narrative fits with the intergenerational discussion where the majority of customers preferred short term investment proposals that recognise the urgency and need to invest now. There are areas for consideration including where it was felt certain Performance Commitments were not ambitious enough – leakage and river pollution - and questions over the validity of the basement flooding service enhancement

3. Limited cost differential between the different plans so affordability levels and patterns are similar – given that one third would find the Proposed Plan difficult to afford, support will be needed for some 'low income' and 'just about managing' customers who will be adversely affected by the proposed bill increases

Source: PR24-14 Acceptability and Affordability Testing Qualitative Findings, May 2023
More detailed findings from AAT on each version of the plan can be found in the Appendix

PR24 Acceptability and Affordability Testing (3/4)

Following the qualitative phase of research, we refined the plan and undertook **quantitative** testing with customers to ascertain both how affordable and acceptable customers found it to be.

Acceptability

- 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.
- Wastewater only customers had similar views on acceptability (64% acceptable) to customers receiving both water and wastewater services from Thames Water (65% acceptable).
- Non-household customers found the plan to be more acceptable (75%) than household customers (62% acceptable).

Affordability

- 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).
- Wastewater only customers had similar views on affordability (19% easy to afford) to customers receiving both water and wastewater services from Thames Water (20% easy to afford).
- Non-household customers found the plan easier to afford (32%) than household customers (16%).

Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023
More detailed findings can be found in the Appendix

PR24 Acceptability and Affordability Testing (4/4)

Some of the further key findings from the **quantitative** phase of Acceptability and Affordability Testing are summarised below.

Investment priorities	Performance Commitments	Enhancement Cases
Water	*Reducing leakage* was the highest investment priority for both household and non-household customers. This was followed by *preventing issues with water quality*, then *reducing the duration of interruptions*.	Both household and non-household customers place a higher importance on *Water demand: helping customers save water* compared with *Water supply: providing new sources of water*.
Wastewater	*Reducing the number of pollution incidents* was the highest investment priority for household customers, whereas non-household customers prioritised *internal sewer flooding*.	Both household and non-household customers place a higher importance on *Reducing pollution of rivers from sewage spills* compared with *Improving the capacity of sewage treatment works*.

Intergenerational Fairness

- Both household and non-household customers would prefer increases to start sooner and be better spread across different generations of bill payers (39% and 47% of responses respectively).
- A remarkably large proportion of household customers (43%) said they didn't know enough to answer – potentially indicating the difficulty of the choice in the current financial circumstances.
- Just 18% of household participants, and 32% of non-household participants, chose to delay increases and pass more of them on to younger and future bill payers.

Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

More detailed findings from AAT can be found in the Appendix

Long Term Delivery Strategy (1/2)

We tested key investments in our Long Term Delivery Strategy, options for phasing bill impacts over the longer-term, and whether an example bill profile to 2050 was fair and affordable for current and future customers.

We tested customers' prioritisation of 10 longer-term improvements (across Water and Wastewater)

Increasing priority

- Reducing the risk of lead in drinking water
- Pollution of rivers and bathing waters
- Appearance, taste and smell of tap water
- Reducing sewage spills into rivers
- Sewage flooding of properties
- Reducing leaks
- Improving the capacity of sewage treatment works
- Water supply interruptions
- Making the water supply more reliable
- Sewage flooding of gardens or outbuildings

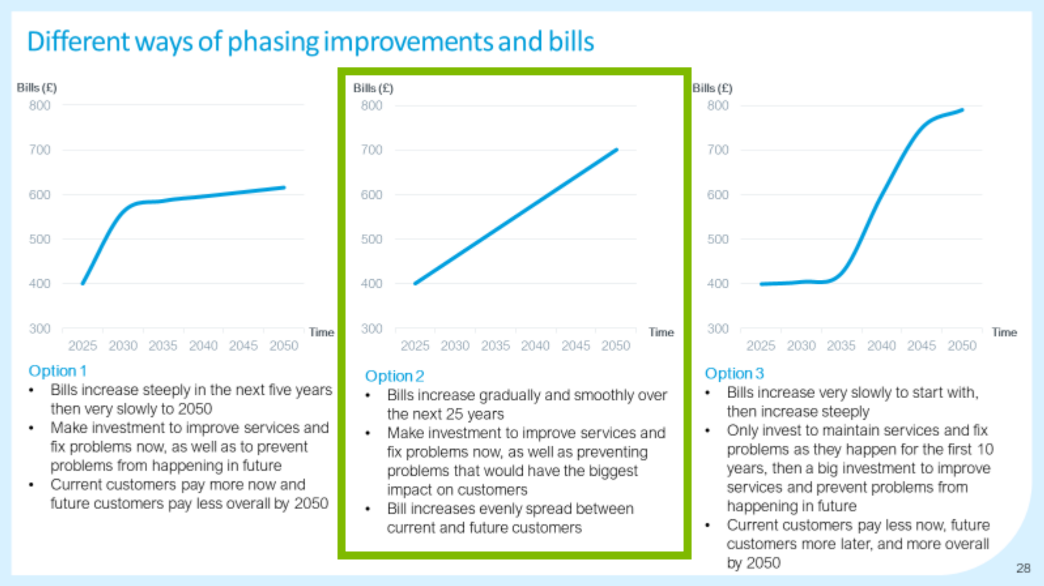
- Most customers thought our long-term plans were broadly acceptable in terms of priorities for investment identified and coverage of improvements to be delivered.
- However, many customers would like targets to be met quicker and/or to be more stretching for reducing the risk of lead in drinking water, pollution of rivers and bathing waters, reducing sewage spills into rivers and sewage flooding of properties.
- Customers often cited that the priorities should be areas where public health or the environment were most impacted e.g. lead in drinking water, pollution, sewage spills, sewage flooding and water quality.
- Leakage was less frequently mentioned as a priority compared with reducing lead in drinking water or reducing sewage spills.
- Little difference between segments, although business customers were often less emotive and more data focused when interpreting the targets.
- Future customers were amongst the most passionate about pollution of rivers, but most customers supported the view that this is a priority area.

Source: SP24 Thames Water Long Term Delivery Strategy, Qualitative Engagement, September 2023

Long Term Delivery Strategy (2/2)

Finally, we tested options for phasing improvements and the associated impact on bills and asked customers about affordability more generally.

Bill profiles



- 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.
- Option 1 was preferred by remaining customers as they would like to see improvements sooner and have a lower bill overall by 2050.

Affordability

- Customers across all segments are feeling the impacts of financial strain, some for the first time/in areas they have not before, and are preparing for even tougher times ahead.
- Energy prices are a major contributor to the high inflation rates. Where water bills are low in comparison now, customers worry how this might change in future.
- 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.

Source: SP24 Thames Water Long Term Delivery Strategy, Qualitative Engagement, September 2023

Your Water, Your Say (1/2)

Summary of key themes raised by participants of Thames Water's first session in May 2023

Theme	Area	What we heard	Example questions from attendees
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.'*
	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?'*
	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?'*

Theme	Area	What we heard	Example questions from attendees
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?'*
	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.'*
	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?'*

Source: PR24-16 Your Water, Your Say, May 2023

Your Water, Your Say (2/2)

Summary of key themes raised by participants of Thames Water's first session in May 2023

Theme	Area	What we heard	Example questions from attendees
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 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?'*
	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?'*
	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.'*
	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.'*

Source: PR24-16 Your Water, Your Say, May 2023

Societal context – September 2023

Research undertaken over the past few years has revealed significant shifts in concerns of customers

In light of this constantly changing landscape, it is crucial that we continue to engage on these topics and take into consideration the evolving views and priorities of our customers, communities and stakeholders. Polling has shown that issues relating to the economy and the environment have over the past few years increased in prominence and are now front of mind for many people. This has been reflected in the findings of our research.

Affordability	The impact of the COVID-19 pandemic and subsequently, the ongoing cost of living crisis, is two-fold: • Firstly, customers who were already struggling financially are finding their economic situation has worsened further. • Secondly, an increasing number of households are finding themselves in financially vulnerable situations for the first time and are often therefore unsure about how to cope and where to seek support. These customers are increasingly concerned about their ability to afford their expenses, particularly relating to energy bills.
The environment and climate change	The water industry has increasingly been the focus of widespread, negative news coverage relating to release of untreated sewage into the UK's rivers and seas. We believe this has resulted in customers placing a higher priority, relative to other enhancements over time on Thames Water investing and taking action to address this issue. Increased concern about climate change prompted by last year's high temperatures and water shortages does not appear to have changed customers' views on our role in tackling it, which remains a relatively low priority.
Leaks and water use restrictions	Water restrictions and leaks have become more prominent in customers' thinking in the past 12 months, especially in the second half of 2022 when there was a hosepipe ban and an outbreak of leaks caused by hot and dry weather. Dealing with leaks was already a top priority for our customers and this has not changed.

We will continue to consult customers on their priorities for their water and wastewater service, triangulate the findings on an iterative basis and feed into our decision making.

2. How to use this document

About this document

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.

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

Insight triangulation approach

Our approach ensures we evaluate and consider the wide range of evidence available to produce synthesised insights from the most robust evidence sources.

Best practice guidance

- Follows best practice guidance from Consumer Council for Water (CCW)
- Includes additional elements used by other water companies at PR19 and energy networks during the RIIO-2 price control.

Wide range of sources

We have collated insights from:

- Existing research and engagement during AMP7 and as part of PR19
- Continuous BAU engagement e.g. C-MeX, D-MeX, R-MeX; satisfaction surveys; complaints
- External insight sources e.g. CCW, Ofwat, Water UK, UKCSI
- Targeted research and engagement specifically for PR24 including enhancement case research and AAT research
- Engagement on our 2050 Vision and Public Value framework

Robustness assessment

- Each insight source is scored to assesses the robustness of the engagement activity and feedback gathered.
- Also highlights any clear divergence of views by groups and/or regions.
- The methodology is based on 'The Magenta Book' guidance for qualitative evaluation by HM Treasury.

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. WCCSW is the first step in this process.

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

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

Timeline

WCCSW / ES	LOS	Internal and external validation
Version 15 – May 22 **Version 16** – July 22 **Version 17** – February 23 **Version 18 (18.3)** – July 23 (September 23)	**Version 1** – May 22 **Version 2** – Sept 22 **Version 3** – May 23 **Version 4** – Sept 23	**CCG review** – May to Jul 22 **CCG review**– Sept to Oct 22 **CCG review** – May to Jul 23 **CCG review** – Jul to Sept 23

We expect each team working on the PR24 submissions to compare their plans to the list of customer needs in this document and set out how their plan either meets these needs or does not meet them, and why.

* In addition to demonstrating how insights have informed proposals, the LOS will document where key triangulation 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.

Insights included in our framework thus far

We have made use of a wide range of inputs, that go beyond solely engagement insights. As of March 2023, 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		Objective of insight
• *Acceptability & affordability testing* • 'Your water, your say' open challenge session • LTDS research	5. Acceptability and affordability	**Test options for overall draft plan with customers and stakeholders.** Opportunity for customers & stakeholders to challenge and inform the balance of our final plan.
• Ofwat / CCW collaborative research across companies (PC priorities and valuations research)	4. Performance commitments	Ensure regulatory incentive rates **and the PC targets we set** are informed by customers willingness to pay for key service measure improvements
• PR24 Phase 1 Enhancement Areas research • PR24 Enhancement package options research • PR24 Phase 2 Enhancement Areas research	3. Enhancement cases (Specific improvement areas)	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)
• Ongoing BAU insights (building on the What Customers Want v14 document) • PR24 Foundation research • Vulnerability deep dive research • Future customers context research	2. PR24 strategies (AMP8 Priorities)	Determine customer, community and stakeholder wants and **priorities** for AMP8 across each service area. **Establish the key outcomes they want us to deliver.**
• Vision 2050 & public value engagement • Strategic framework research (incl. WRSE, WRMP, DWMP)	1. Long term delivery strategy (Ambition and strategy)	Use customer, community, stakeholder insights to inform **level of ambition and long term strategy** (incl. phasing of key investments)

Navigating this document – structure

WCCSW v18 is divided into 5 parts:

1. Summary of Insights

Overview of what customers, communities and stakeholders want:

- 3 Themes
- 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

Navigating this document – what to look out for

	Wants	Topics	Detailed Insights	Enhancement Insights
What it is:	One-line messages of the overarching customer, stakeholder and community Wants per service area	Under each overarching Want, key topics have been identified by customers, stakeholders and communities and grouped together	Elaboration on each topic through detailed insight synthesis, from different sources and perspectives. Insights are grouped into sub-topics emerging from the most robust evidence sources.	A more granular view of insights is provided separately for specific PR24 enhancement areas, detailing the insight supporting both the need and the solution for each area.
Example:	WT1. I want safe, high quality drinking water	• Water quality	• Half of customers say that any problems with the taste, smell and colour of tap water would have a significant impact on their households' day-to-day activities. • However, they place a modest value on improving the taste, smell or colour of water.	Customers want us to replace all Thames Water owned lead pipes by 2050. The majority support our plans to replace 67,000 customer lead pipes and 3,000 water fountains in schools from 2025 to 2030

	Customer Prioritisation	Segmented Insights	Stakeholder views	Vision 2050
What it is:	In the document we present charts with customer relative prioritisation of Wants or Improvement areas. These are signposted with the 'Customer Prioritisation' icon.	Insights from different customer segments have been integrated into the Detailed Insights sections and are signposted throughout the document. Where customer segment insights differ from key priorities or are specific to a segment, these are highlighted in the separate 'Segmented Insights' section.	Stakeholder views* are recorded throughout the document in orange text. These are presented alongside customer views.	A more detailed view of customer insight from Vision 2050, which is mapped to customer Wants. These insights are integrated into the Detailed Insight sections.

* For WCCSW v18, both communities and stakeholders have been considered together as 'Stakeholder Views'. Definitions of customers, communities and stakeholders are provided on pg. 30

3. Our customers

Segment definitions

We have engaged with and gathered insights a range of groups and segments across Customers, Communities and Stakeholders:

Customers

- Those who pay for our services for their domestic households, both water and wastewater together or only wastewater. We have also engaged specifically with a range of customer sub-groups, including customers in vulnerable circumstances, customers who are either registered or eligible for our PSR, and digitally excluded customers.
- Those who use our services, but who don't pay the bills e.g. future bill payers
- Non-household customers which comprise a range of scales, from micro-businesses e.g. cafés and restaurants, to SMEs and larger businesses such as breweries or manufacturers
- Developers - homeowners extending their properties or large developers who wish to connect to our clean water and wastewater networks
- SLPs and NAVs - we also provide services to Self-Lay providers (SLPs), who lay new pipes and sewers on behalf of developers, and New Appointments & Variation (NAVs), who provide water and wastewater services in a defined geographic area

Communities

- Communities of customers in local and regional areas
- Groups of customers with shared interests e.g. Farmers, religious groups, anglers, students / youth
- Smarter Water Catchment areas (Crane, Chess, Evenlode) and other catchment areas
- Those living near STWs, WTWs, roadworks, TTT works

Stakeholders

- Organisations who represent the interests of household and non-household customers (e.g. Citizens Advice; Age Concern, Chambers of Commerce; National Farmers Union)
- Elected representatives – councillors, MPs and London Assembly Members
- Local authorities, regional and national government officials
- Charities and NGOs, such as local or regionally-focussed environment groups

Note: Based on existing insights, the views of communities and stakeholders have been considered together in WCCSW v18. When insights allow, the views of customers and communities from specific regions is highlighted.

Customer segments

Household customers

- 15 million customers
- 10 million receiving water & wastewater services (3.5 million bill-payers)
- 5 million waste-only, where water services (and billing) provided by water-only companies (2 million bill-payers)
- Includes vulnerable customers (289,000 registered for priority services, 267,000 benefit from a social tariff)
- 0.8-1.2 million commuters per day
- 22 million international visitors, 12 million domestic overnight visitors and 281 million domestic day trippers per year
- Customers also experience Thames Water indirectly through roadworks, public access to blue-green spaces, etc.

Non-household customers

Business customers

- 250,000 businesses
- Do not have a direct billing relationship with us
- 2,000 businesses using a very large amount of water that purchase water directly from Thames Water

Retailers

- 17 retailers licensed to serve eligible businesses in England
- Buy wholesale water and waste services from Thames Water and resell to business end users
- Manage the billing relationship with our 250,000 business customers

Developers

Developers include people extending their property and developers who wish to connect to our water and waste networks

Small scale developers

- Homeowners & small builders

Large scale developers

- Major home builders
- Engineering consultants
- Land promoters
- Major construction projects

Self Lay Providers (SLPs)

- Contractors that lay new water pipes and sewers for developers

New Appointments & Variations (NAVs)

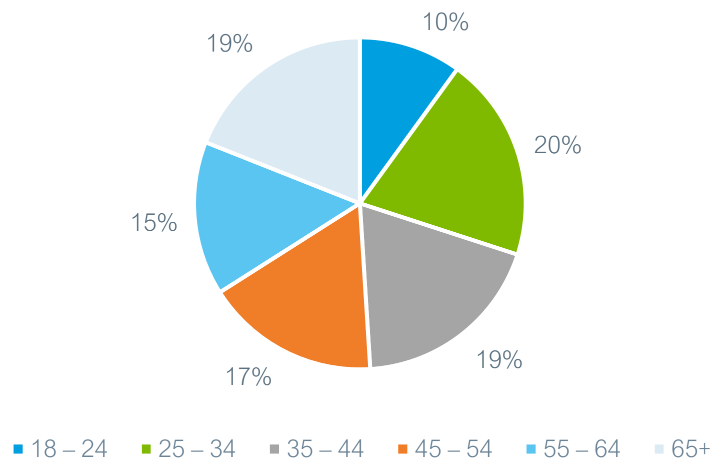
- Provide water and waste services in a defined geographic area
- Own the billing relationship with household customers; non-household customers are still billed by Retailers

Sources: Thames Water website; Thames Water analysis; Vision 2050; 2021/22 TW Annual Performance Report, London Datastore

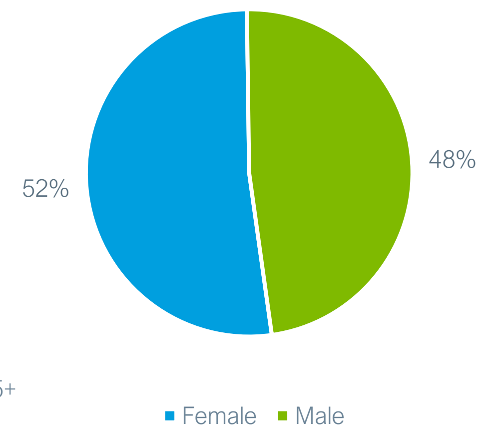
Household Customer demographics (1/2)

15 million customers, including around half a million vulnerable customers

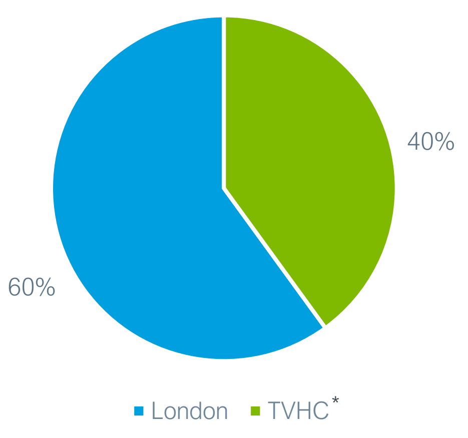
Age



Gender

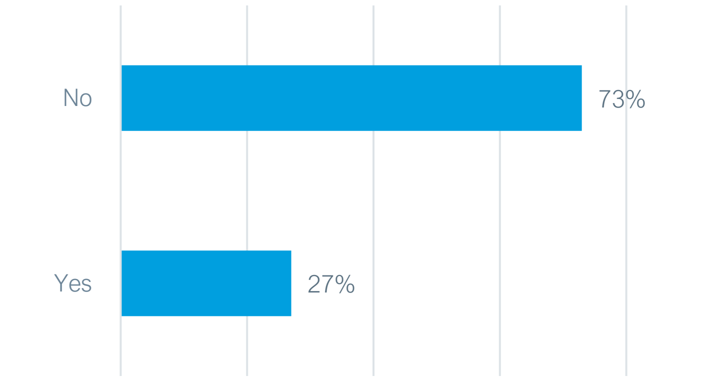


Location

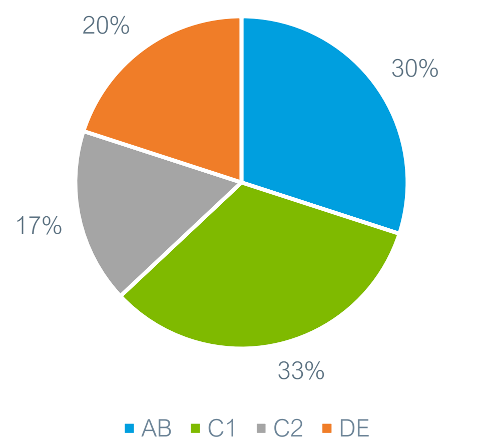


Disability within household

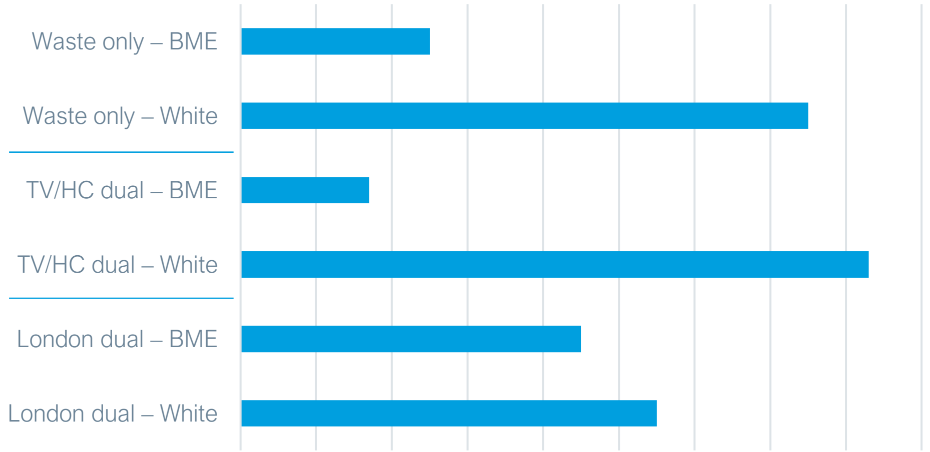
Disability within household refers to the proportion of households Thames Water serves in which a disabled consumer lives.



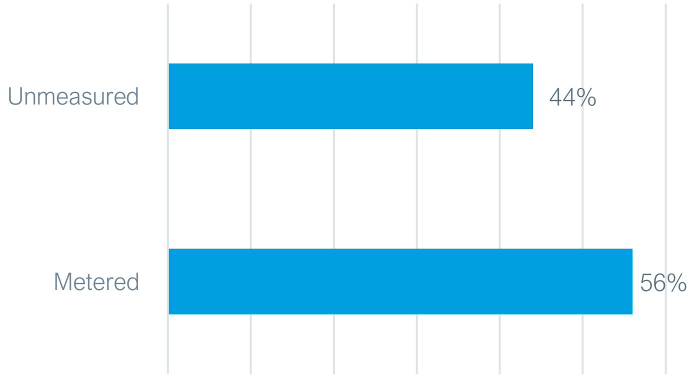
Socio-Economic Group



Ethnicity



Metered vs Unmeasured



*Thames Valley and Home Counties
Sources: 2021 Census & Thames Water data

Household Customer demographics (2/2)

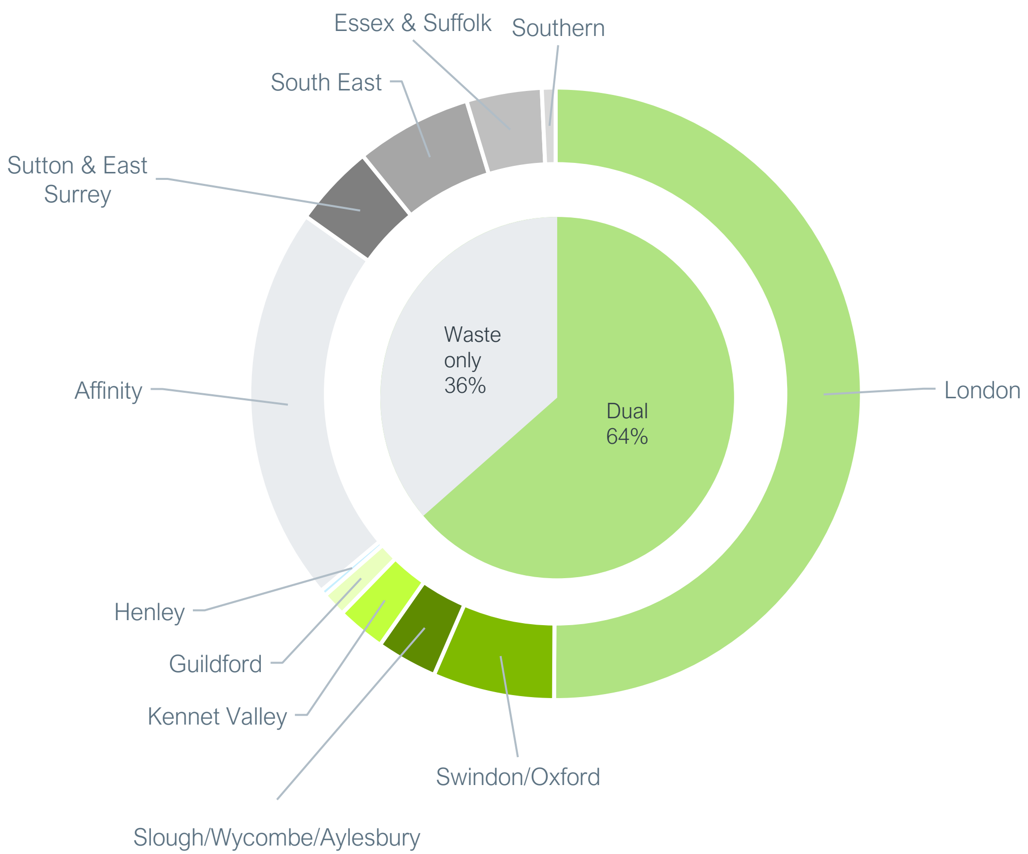
Half of our customers are in London and just over a third of our customers receive only Waste services from us

Our region

Service type	%	Region	%
Dual	64	London	78
		Swindon/ Oxford	10
		Slough/ Wycombe / Aylesbury	5
		Kennet Valley	4
		Guildford	2
		Henley	0.5

Service type	%	Water only company	%
Waste only	36	Affinity	58
		Sutton & East Surrey	12
		South East	17
		Essex & Suffolk	11
		Southern	2

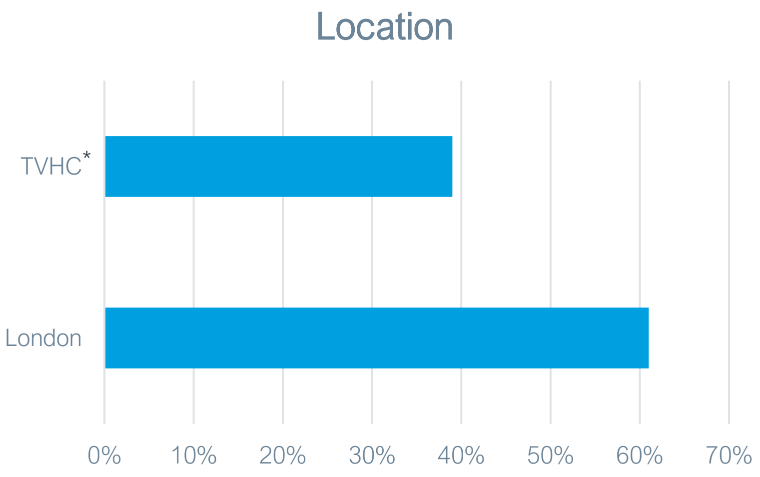
Service types and regions

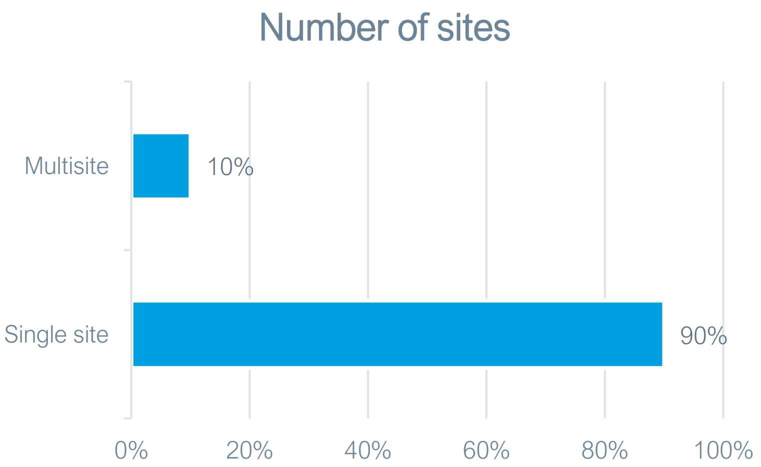


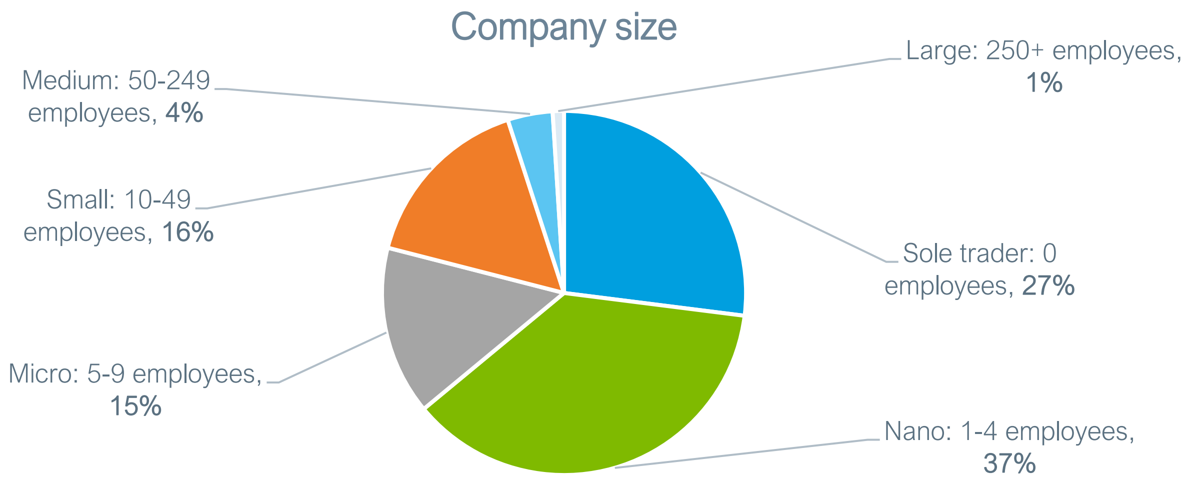
Sources: 2021 Census & Thames Water data

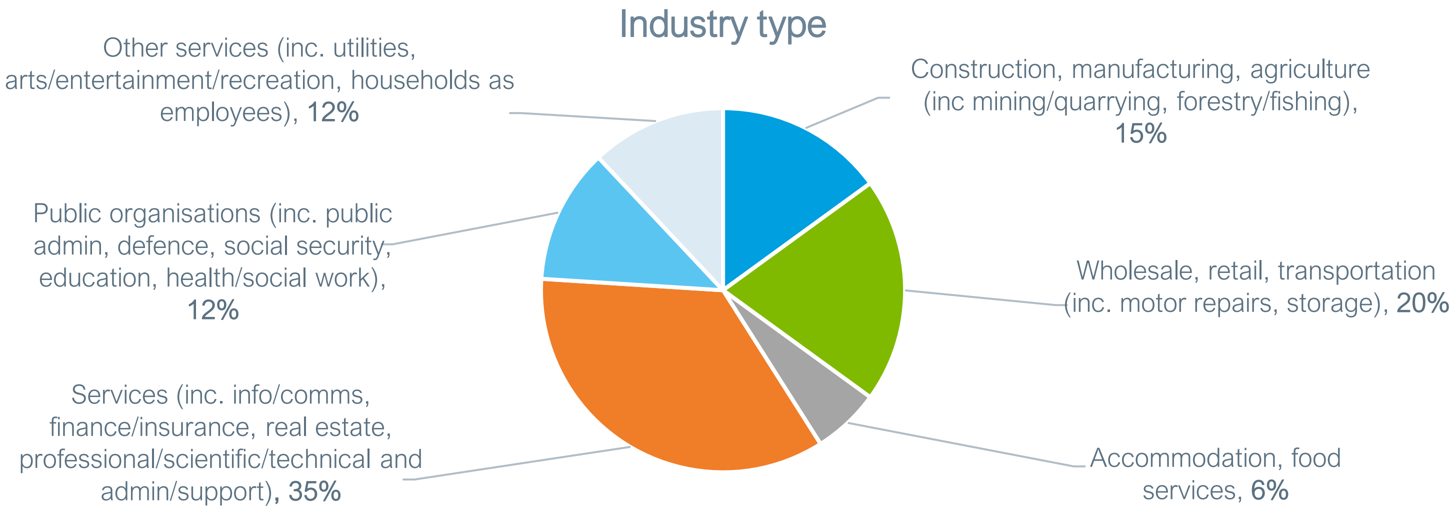
Non-household customer firmographics

250,000 business customers and 17 retailers who manage the billing relationship between them and Thames Water









*Thames Valley and Home Counties
Sources: Dun and Bradstreet, 2023

4. Summary of insights

Wants

Summary of Insights – **For Customers** (1/2)

The ‘for Customer’ pillar is broken down into 5 Wants and 11 Topics

Wants	CS1. I want an easy customer experience and tailored support			AF1. I want fair and affordable bills	
Topics	Customer experience	Billing	Vulnerable customer support	Affordability	Social tariffs
Sub-topics	• Ease of contact and solving customers’ queries • Proactive communications and resolution of service issues • Providing an empathetic customer service, which is accessible to all	• Bill design • Metering • Experience of vulnerable customers	• Communication preferences of vulnerable customers • Understanding the drivers of vulnerability • Priority services register (PSR) • Supporting customers with specific needs (e.g. medical, learning difficulties, elderly or mental health issues) • Impact of water outages on vulnerable customers	• Value for money • Affordability for household customers • Affordability for those struggling to pay • Affordability for non-household customers • Factors affecting dealing with debt • Stable bills	• Awareness of financial support

Wants

*Summary of relevant performance commitment provided (PR24-14)

Summary of Insights – **For Customers** (2/2)

The 'for Customer' pillar is broken down into 5 Wants and 11 Topics

Wants	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		
Topics	Water quality*	Water supply interruptions*	Water network resilience	Wastewater network resilience	Sewer flooding*	Blockages
Sub-topics	• Appearance, taste and smell • Water treatment • Lead pipes • Hardness • Perceptions of vulnerable customers of water quality and safety	• Maintaining infrastructure • Supply interruptions • Experience of vulnerable customers • Low pressure	• Mains repairs • Investing for the future	• Maintaining and upgrading existing wastewater infrastructure • Customer attitudes towards increasing use and prioritisation of 'new' wastewater solutions • Priorities for planning and investing for the future	• Attitudes towards sewer flooding	• Customer knowledge of blockages • Education and campaigns
Enhancement cases	• Reducing risk of lead in drinking water • Reducing risk of serious bacteria in drinking water	• SEMD (Security & Emergency Measures Direction)	• Improving water supply resilience • Reducing risk of basements flooding from trunk mains		• Improving resilience to sewer flooding in homes	

Our customers' expectations

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

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.

Wants

Summary of Insights – For Communities

The ‘for Communities’ pillar has 1 Want, broken down into 3 Topics

Wants: CI1. I want you to have a positive impact on the community

Topics	Corporate Social Responsibility and local impact	Transparency	Biodiversity
Sub-topics	• Giving back to local communities • Corporate social responsibility • Minimising impact of works	• Ownership and profits • Open and honest • Public role • Trust and perceptions of Thames Water and the water sector • Engagement and relationship with customers and stakeholders	• Providing access to our sites for recreation • Attitudes towards improving biodiversity

Our customers' expectations

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.

Summary of Insights – For the Environment

Wants

*Summary of relevant performance commitment provided (PR24-14)

The 'for the Environment' pillar is broken down into 3 Wants and 6 sub-topics

Wants	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
Topics	Water resources	Water demand management	Sustainable abstraction	Leakage*	River health*	Net zero carbon
Sub-topics	• Impact of climate change • Source changes • Water recycling • Other water resource options • Long-term supply	• Education and campaigns • Behavioural change • Metering • Views and attitudes of vulnerable customers towards water usage • Tariffs	• Reducing abstraction • Future supply options	• Leakage levels • Prioritisation of leakage reduction over new sources of supply	• Pollution incidents • Improving river quality	• Renewable energy transition and use • Approach to decarbonisation
Enhancement cases	• Develop new water resources	• Demand management (metering & water efficiency)	• Reducing abstraction from vulnerable sources		• Reducing sewage spills to rivers and improving river health • Infiltration	• Industrial Emissions Directive

***ENV1 cuts across the other three wants within 'For the Environment*

Our customers' expectations

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'

4.1 For Customers – Detailed Insights

Wants

Summary of Insights – **For Customers** (1/2)

The 'for Customer' pillar is broken down into 5 Wants and 11 Topics

Wants	CS1. I want an easy customer experience and tailored support			AF1. I want fair and affordable bills	
Topics	Customer experience	Billing	Vulnerable customer support	Affordability	Social tariffs
Sub-topics	• Ease of contact and solving customers' queries • Proactive communications and resolution of service issues • Providing an empathetic customer service, which is accessible to all	• Bill design • Metering • Experience of vulnerable customers	• Communication preferences of vulnerable customers • Understanding the drivers of vulnerability • Priority services register (PSR) • Supporting customers with specific needs (e.g. medical, learning difficulties, elderly or mental health issues) • Impact of water outages on vulnerable customers	• Value for money • Affordability for household customers • Affordability for those struggling to pay • Affordability for non-household customers • Factors affecting dealing with debt • Stable bills	• Awareness of financial support

Summary of Insights – For Customers (2/2)

Wants

*Summary of relevant performance commitment provided (PR24-14)

The 'for Customer' pillar is broken down into 5 Wants and 11 Topics

Wants	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		
Topics	Water quality*	Water supply interruptions*	Water network resilience	Wastewater network resilience	Sewer flooding*	Blockages
Sub-topics	• Appearance, taste and smell • Water treatment • Lead pipes • Hardness • Perceptions of vulnerable customers of water quality and safety	• Maintaining infrastructure • Supply interruptions • Experience of vulnerable customers • Low pressure	• Mains repairs • Investing for the future	• Maintaining and upgrading existing wastewater infrastructure • Customer attitudes towards increasing use and prioritisation of 'new' wastewater solutions • Priorities for planning and investing for the future	• Attitudes towards sewer flooding	• Customer knowledge of blockages • Education and campaigns
Enhancement cases	• Reducing risk of lead in drinking water • Reducing risk of serious bacteria in drinking water	• SEMD (Security & Emergency Measures Direction)	• Improving water supply resilience • Reducing risk of basements flooding from trunk mains		• Improving resilience to sewer flooding in homes	

CS1. I want an easy customer experience and tailored support / Customer experience

Insight synthesis

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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)		
Performance Commitment	**Importance (Lower / Mild / High)**	**How do customers view this?**
Customer satisfaction	Lower	Customers felt it was important that companies provided good customer service, but most rarely – if ever – require it

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Detailed Insights

Segmented Insights

CS1. I want an easy customer experience and tailored support / Customer experience

Sub-topic	Detailed Insights	Key Sources
Ease of contact and solving customers' queries (1/3)	Customers want the right help from friendly, polite and knowledgeable staff, to be kept updated and informed, to have their issue resolved and as quick as possible, and for it to be easy to use our website. Not being able to quickly resolve an issue in one call or email is a frequent issue emerging from our ongoing customer experience research. (CX1-CX14, CX76-81) Time taken to resolve issues and time spent chasing up issues is also frequently reported as an issue by developers. Issues not being resolved quickly was also a frequent factor mentioned in negative Trustpilot reviews. (CX1-CX14, CX76-81, CX96-97). Performance has however improved in developer satisfaction with speed of response and provision of single point of contact through 22-23. (CX111) Not being able to resolve issues quickly is also frequently mentioned as an issue for many customers in C-MeX research, which shows Thames Water declining in comparison to other water companies. Better customer service, better communication, unresolved outstanding issues and being more responsive are highlighted as key areas for improvement. (CX89, CX120, CX121) Lack of quick resolution of billing and other issues is a crucial driver of low customer satisfaction overall (CX89), however satisfaction with billing has remained stable over the year. (CX120, CX121) Unhappy customers are still a result of our slow service and inability to resolve problems in a timely manner. Customers are further annoyed when quality updates fail to materialise. (CX121) A failure to keep promises around follow-up communication and updates is an area of concern for developers. Also taking too long to provide quotes and the quality of the information provided. Developers want us to improve communications with them, simplify our processes and respond quickly to their queries. (CX111) Among those contacting Thames Water in the past, three quarters had their issues resolved. This proportion is largely consistent over the longer term. There has been a gradual decrease in the number of customers who say their issue was resolved, however, a gradual increase in satisfaction with how their issue was handled over the past 6 months. (CX89, CX120) Customers expect us to recognise a problem and act on it where possible rather than wait for them to contact us with a problem. If customers do need to contact us, they expect us to be proactive to prevent issues escalating. (CX1-CX14, CX45) Customer satisfaction with Contact Experience, including 'ways of contacting', 'ease of contact' and 'speed of response', has gradually decreased between Q1 2019/20 and Q2 2022/23. (CX22-CX24, CX114) In Q1 of 2023-24, however, we are seeing a continuation of a positive trend in satisfaction with the above since Q3 2022/23. (CX120) Customers are often frustrated with the speed and extent to which their issues are across a number of areas e.g. billing, reporting a leak, flooding, blockages etc. This remains a key driver of customer satisfaction. (CX76-CX81, CX89, CX120) Two companies stand out as poor performers in relation to written complaints - Southern Water and Thames Water. Thames Water's written complaints increased by 1.3 per cent as the company reported 40,060 in total, making it the worst performer on this measure. (R39)	Insight Sources v18: CX111 D-MeX 2022-23 Q4 year 3 review, June 2023 CX120 C-MeX CES and Brand Survey Q1 23-24, July 2023 CX121 Heartbeat of customer insight, August 2023 CX126 Vulnerability insight report 2023-2024 Q1, August 2023 Insight Sources v17: CX76-81 Heartbeat of Customer Insight July-December 2022 CX89 C-MeX CES and Brand Survey Insights Q2 2022-23 CX96 D-MeX 2022-23 Q1 year 3 review, September 2022 CX97 D-MeX 2022-23 Q2 year 3 review, December 2022 R39 CCW – Household complaints report, March 2022 Insight Sources pre-v17: CX1-CX14 Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints, November 2021-January 22 CX22-CX24 Brand Survey (Q1 2021/22 – Q3 2021/22) CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources	
Ease of contact and solving customers' queries (2/3)	Customers want an effortless service, where there is no need for much contact with Thames Water. But when they do need to contact us, they want it be effortless. Customers want to be able to easily contact Thames Water by the channel of their choice. (CX29) The introduction of webchat has been welcomed by customers, with high rates of satisfaction with the ability to resolve issues via this channel. Customers also like the friendliness of webchat agents they interact with as well as the short wait times for the service. (CX1-CX14, CX76-81) More broadly, nearly two thirds of consumers are now more used to interacting digitally with companies since the pandemic and seven in ten want utility companies to provide online resources that make it easy to resolve their questions themselves. 60% would prefer not to call customer services at all if they can solve their issues using online resources. (R16) When things go wrong there should be minimal disruption so customers should barely notice. Customers want issues to be resolved quickly and efficiently, preferably with just one contact or at the time of investigation, by knowledgeable staff. If we cannot resolve issues during the first contact, they expect clear next steps and timelines, and a dedicated point of contact where possible. (CX1 – CX14, CX76-81, CX121) Customers expect us to deliver on our promises, the fix should be permanent, and we should recognise that resolution is when things return to exactly as they were before. (CX76-81) Customers should be able to easily contact us if they need to by the channel of their choice. They shouldn't have to wait to speak to an advisor, we should respond to social media, webchat and email messages promptly and our website should be quick & easy to use. We must also call customers back when promised. (R10) Customers are happy with the speed with which they can resolve issues via webchat but feel that they are not able to solve problems quickly via email. (CX1-CX14, CX76-81) Developers want Thames Water to be more proactive in communicating and updating them, providing a single point of contact and improve understanding of their requirements. They want simplification of quotation and application processes, better co-ordination between teams and improvements to the website. They also encourage Thames Water to improve response times for customer queries, improve delivery timescales and reduce delays. (CX33, CX76-CX81, CX111, CX121)	Insight Sources v18: CX111 D-MeX 2022-23 Q4 year 3 review, June 2023 CX121 Heartbeat of customer insight, August 2023 Insight Sources v17: CX76-81 Heartbeat of Customer Insight September July-December 2022 Insight Sources pre-v17: CX1-CX14 Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints, November 2021-January 2022 CX29 Thames Water Customer Voices Polls and Forums Key Insights 2021-2022. January 2022 CX33 Thames Water D-MeX (Developer Services) 2021-22 Q2 Summary, December 2021 R10 UKSCI January 2022 Results - Utilities Sector Resource Pack, January 2022	
		Insight Triangulation Key	
		Robustness of evidence	High
		Divergence of view (by group)	Low
		Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Ease of contact and solving customers' queries (3/3)	Some support organisations said that they had had to advocate on behalf of their service users to resolve billing issues. In one example, a customer had a dramatically increased bill, and tried to resolve it on their own with Thames Water. Initially, they were told they would have to pay it. However, when the support organisation got involved, there was found to be a leak and the payment was cancelled. However, it took a lot of phone calls and time. (CX113) Some described an inconsistent response when they contacted Thames Water a number of times and got different answers depending on who they spoke to. Furthermore, some call handlers were felt to be more supportive and empathetic than others. (CX113) Participants also identified practical barriers to applying for affordability support. Some described difficulties getting through on the phone and having to make numerous phone calls. (CX113) Others described specific logistical issues, such as a lack of phone credit making it difficult to make long phone calls; limited time in libraries for free internet access and the requirement to print, complete, scan and send WaterHelp application forms. (CX113) Time available to deal with problems came up frequently in interviews. Many participants talked about the long wait times on phonelines to companies, and that this put them off making a call. Participants also talked about the persistence needed – many issues require multiple calls to organisations, and follow-ups when things do not happen. (CX113) Customer satisfaction with FCR, with regards to billing, has increased from December to May 2023 - Unhappy customers are still a result of our slow service and inability to resolve problems in a timely manner. Customers are further annoyed when quality updates fail to materialise. (CX117) Customer satisfaction with FCC, with regards to billing, decreased from January to April 2023, then increased again in May 2023. 23% of customers that contacted the FCC business unit reported having a bad customer experience - The decrease in customer satisfaction has been reported to be due to: the amount of time it takes for issues to be resolved, agents' incapacity to help, and the lack of updates provided for customers. (CX117) Future bill payers are less satisfied with all service elements, compared with customers more generally and are less likely to agree with Thames Water's brand values related to direct customer interactions: such as Thames Water being friendly, helpful and easy to deal with, and that they inform of the good they are doing. (CX105)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023 CX121 Heartbeat of customer insight, August 2023 CX105 Brand survey 2022/23 Future customer analysis, 2022/2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Fix service issues the same day (Ranked 10th / 19 Vision 2050 goals tested with customers)*	Fixing service issues on the same day is important for most customers. All customers expect a great customer service from Thames Water and whether they have already experienced issues or not, they would like issues fixed as soon as possible. (SP12) Customers strongly support this goal, largely due to the perceived importance of having an efficient customer service and same-day repair, though many customers would like more details as to how the goal will be achieved. (SP12) 91% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most believe that customer service should be at the core of Thames Water's business and feel it is imperative for Thames Water to improve. For the vast majority of customers this goal seems slow. They think this can be achieved within a shorter timeframe. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Proactive comms and resolution of service issues (1/5)	Not getting updates and lack of proactive communication are areas of particular concern for customers. Customers become frustrated when promises are broken, agents do not have the power to fix issues or communication is not proactive. (CX1-14, CX18-CX21) Customers are less satisfied in relation to 'keeping me well informed', 'responding and resolving issues', and 'keeping promises'. (CX76-81, CX121) Many customers want investigation of their issue to take place within a few hours, and most want it to happen on the same day, preferably during the first contact. (CX1-14, CX18-CX21) Taking too long to resolve issue or attend, providing insufficient help given on first contact, not keeping promises, and failing to call back are also key pain points for customers. Customers are frustrated by a lack of information available over the phone and incorrect information being provided. (CX76-81, CX121) Some developers also reported negative experiences in having to chase up issues and lack of proactive communication from Thames Water. Customers scored Thames Water's quality of communication lower in Q3 2023, indicating they want Thames Water to be more proactive with communications and updates. Customers also indicated that processes need simplifying, improved timescales with faster response times and reductions in delays. These are consistently the main areas of improvement listed by customers as well as wanting better value for money. (CX111) Satisfaction with DS water is significantly lower than it is with DS waste, driven by long wait periods to begin work and tackle issues, unfulfilled promises to contact customers back, and a lack of high-quality updates all have contributed to dissatisfaction. Customers also perceive the service to be quite expensive. (CX121) Stakeholders indicated that they are particularly quick to address the situation and support communities when an incident occurred. Whilst the general increased speed and tone of responses is noted the occasionally slow response time or lack of any response from Thames continues to be a frustration for stakeholders, especially for those with a lower profile such as Councillors or small-scale NGOs. (S14) Some [vulnerable customers] in long term debt welcomed the fact that Thames Water did not aggressively chase them for payment but there was some feeling that the lack of proactive contact meant that it was easy for them to avoid actively engaging and to ignore their water bill debt. This exacerbated the problem and resulted in more issues in the long term. (CX113) A lack of joined up action was flagged by an intermediary organisation [vulnerable customers]. They had contacted Thames Water in relation to a customer who had a large bill because of a water leak and did not have capacity or confidence to speak to the company themselves. The intermediary arranged for payments to be made in instalments and also flagged the customer's medical needs. They were then directed to a separate department rather than everything being dealt with in one go. (CX113)	Insight Sources v18: CX111 D-MeX 2022-23 Q4 year 3 review, June 2023 CX113 Vulnerability Deep Dive Research, April 2023 CX121 Heartbeat of customer insight, August 2023 Insight Sources v17: CX76-81 Heartbeat of Customer Insight July-December 2022 Insight Sources pre-v17: S14 Stakeholder Reputation Research. March 2022 CX1-CX14 Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints, November 2021-January 2022 CX18-21 C-MeX Year 1 Review: Customer Research & Insight, May 2021 – February 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Proactive comms and resolution of service issues (2/5)	Customers expect communication on interruptions to their water supply that are clear and immediate, with an apology, an explanation of what's going on, and a timeframe for when the issue will be fixed. (SP6) Speed of service and providing customers with updates during supply interruptions is the main driver of satisfaction. Customers are feeling frustrated with agents unable to provide support and are unhappy with not receiving updated information related to their issue. (CX76-CX81, CX121) The way customers would like us to respond during interruptions varies depending on the cause and the duration of the incident. For example, if the breakdown of equipment caused 10+ days of disturbance then customers are more likely to expect some money off the bill. If it's only 24 hours, then just communication is sufficient. (SP6) Customers expect sufficient notice of planned work - having no water for 4-8 hours with warning is considered half as bad as without any warning. Customers expect to hear from us if there is a supply interruption. Customers view public messages on the Thames Water website as 'okay', but ideally they want more, for example text message updates and door to door contact. Customers find it unacceptable to be given no information. They want updates with specific, useful information. (SP6) For periods longer than 2-3 days (approx.) customers start to expect further solutions including portable toilets or alternative facilities, compensation or reduced bills. (SP6) Business customers and household customers largely react the same way towards interruptions, but business customers have higher expectations of Thames Water as they are considering the impact on their business running, as well as the facilities needed for staff. (SP6) Businesses place high priority on communication ahead of interruptions for planning and mitigation purposes. They also expect a degree of assistance and compensation (e.g. water tankers to provide greater quantities of water for business use not just drinking water). Some customers consider supplying bottled water essential, whereas others see this as a nice gesture and not the basic expectation. (SP6) Customers are more tolerant to interruptions or changes in water sources if sufficient warning is given in advance and sufficient information is given before and during any interruption. Customers prefer communications which are separate to their water bill, by email or letter (R15, SP14) Local authorities / MPs prefer when queries and issues are resolved quickly and efficiently upon reporting so they don't have to chase for information or action, or having the issue dealt with only once escalated to the MP contacting Thames Water directly. (S14)	Insight Sources v18: CX121 Heartbeat of customer insight, August 2023 Insight Sources v17: CX76-81 Heartbeat of Customer Insight July-December 2022 Insight Sources pre-v17: S14 Stakeholder Reputation Research, March 2022 R15 Ofwat + CCW Customer Preferences Research, April 2022 SP14 WRSE Water Resources Quant Research, June 2022 SP6 Water Supply System Resilience Programme – Customer Research (Quantitative findings), January 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Detailed Insights

Segmented Insights

<table>
<tr><th>Sub-topic</th><th>Detailed Insights</th><th colspan="2">Key Sources</th></tr>
<tr><td rowspan="5">Proactive comms and resolution of service issues (3/5)</td><td rowspan="5">Few customers think about the likelihood of sewer flooding and few have experienced it. Those who have report feeling desperate and wanting an immediate response. Customers are unforgiving of failure or a slow response (PR24-3, PR19-9)

Customers place considerable emphasis on customer service and communication in this situation. They expect sympathy, reassurance, efficiency, to be taken seriously and a visible presence on the scene. They want fast response times, within 1 or 2 hours, and follow up work and cleaning up to be done at the same time or at least within 24 hours. Current service levels fall short of expectation and improved response times is the most valued service aspect. There is no real understanding that it can take longer to allow time for flooding to recede or dry out. If our service falls short it gives the impression we don’t care. (PR24-3, PR19-9)

A small minority of contacts are about sewer flooding but those calling are less satisfied than the overall average. They find us easy to contact and experience a good prompt initial response. But those experiencing complex and recurring issues feel that the underlying issue is rarely sorted out; communication is poor and that it requires several visits from different parties. For customers with recurring sewer flooding problems there is a sense of resignation that we won’t actually fix the problem permanently, but just put another ‘band aid’ on. (PR24-3, PR19-9)

Customers expect us to do more to avoid this problem especially where there are recurring issues; customers want it treated with the highest priority with a very prompt response and that there is clear management of all parties to provide effective, permanent resolution and clear communication with customers. Customers would like to see real-time sewage spill alerts. (PR24-3, PR19-9)

Customer dissatisfaction across a range of service areas e.g. fixing leaks, supply interruptions, addressing blockages etc. stems mainly from length of time to fix the problem, lack of knowledgeable agents and failing to update customers on status of the problem. (CX121)

Developers have expressed dissatisfaction with Thames Water’s failure to keep promises, lack off follow-up communication and updates, delays in providing quotes, and dissatisfaction in the quality of information provided. (CX117)

To help end sewer flooding misery, companies need to keep in focus the need to maintain good standards of service across all areas but especially in relation to communicating during extreme events that have the potential to have a significant physical, emotional and psychological impact. Companies should be sharing best practice, through a policy and best practice exchange. (CX110)</td><td colspan="2">Insight Sources v18:
CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023
CX121 Heartbeat of customer insight, August 2023

Insight Sources pre-v17:
PR24-3 PR24 Foundational Research – Social Media, November 2021

Pre-2020 Insight Sources:
PR19-9 CR26d Deep Dives, sewer flooding and blockages, BritainThinks, October 2016</td></tr>
<tr><th colspan="2">Insight Triangulation Key</th></tr>
<tr><td>Robustness of evidence</td><td>High</td></tr>
<tr><td>Divergence of view (by group)</td><td>Low</td></tr>
<tr><td>Regional differences</td><td>Low</td></tr>
</table>

CS1. I want an easy customer experience and tailored support / Customer experience

Stakeholder views | Detailed Insights | Segmented Insights

<table>
<tr><th>Sub-topic</th><th>Detailed Insights</th><th>Key Sources</th></tr>
<tr><td rowspan="4">Proactive comms and resolution of service issues (4/5)</td><td rowspan="4">Improving the customer experience for blockages is still primarily focused on resolving issues promptly, getting to the scene swiftly, fixing problems correctly (the first time), and keeping our promises (to get to the scene and call customers back). Customer satisfaction with the blockage and flooding journey has increased since Q4 2022/23. (CX121)

Customers experiencing blockages problem say they find it easy to contact us and the problem is generally fixed within 24 hours. But some with complex or recurring issues experience a poorer service where resolution is slow or the problem is not resolved at all and communication suffers. (PR19-9)

Customers expect a prompt response within a few hours. For some, our service promise of up to 24 hours is thought to be too long - effective resolution is required as quickly as possible. (PR19-9)

They also expect clarity over responsibility for pipes and blockages, information to help customers avoid blockages and more information about the service available to clear blockages. (PR19-9)

The key issues customers who are unsatisfied generally cite that responses to serious issues they face are slow or they had been ignored altogether and issues are not resolved at all. (CX61, CX76-CX81, CX121)

Customers stress the importance of effective and consistent communication throughout the process of fixing leaks. While fixing leaks quickly is clearly key, communication is equally important throughout. (CX36, CX45)

Although some customers are satisfied with Thames Water's communication, others feel that we need to take a more active role in keeping customers informed at all stages, through a range of different channels, to reach as many of those impacted as possible. These channels include email, social media, app, local networks, empowering engineers on the ground, and leaflets through doors. (CX36, CX45)

Customers also feel it is crucial that we ensure that leakage reporting is easy to access, allowing effective two-way communication. Customers highlight that they want information directly from Thames Water, rather than needing to rely on informal channels such as Facebook groups (CX36, CX45)

The majority of developers indicated that communication is the most important factor when dealing with Thames Water. (CX109) A number of developers thought there was room for improvement for Thames Water relating to improved communication, simplified processes and better provision of necessary information to NAVs. (CX124)

Stakeholders and customers in London and Thames Valley both report dissatisfaction with the level of communication for both planned and emergency work. Strong request for more info and details on upcoming and ongoing works. More info at our sites and on our boards, eg – we are aware of this and are working on it. Timeline info would be very helpful. Customers have also reported a lack of available info during incidents when contacting the call centre. (S38)</td><td>Insight Sources v18:
CX121 Heartbeat of customer insight, August 2023
CX109 Thames Water Developers day 2023 Poll Results (27 Feb - 03 Mar 2023), March 2023
CX124 Southern Region PR24 Development Engagement, August 2023
S38 Elected representative issues tracker, May 2023

Insight Sources v17:
CX76-CX81 Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints, July-December 2022

Insight Sources pre-v17:
CX61 PR24 Service Survey Phase 1 Deep Dive Keywords, February 2022
CX36 Thames Water Board and Customer Engagement Session on Leakage, May 2021
CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020

Pre-2020 Insight Sources:
PR19-9 CR26d Deep Dives, sewer flooding and blockages, BritainThinks, October 2016</td></tr>
<tr><td>Insight Triangulation Key</td></tr>
<tr><td>Robustness of evidence: High
Divergence of view (by group): Low</td></tr>
<tr><td>Regional differences: Low</td></tr>
</table>

CS1. I want an easy customer experience and tailored support / Customer experience

Sub-topic	Detailed Insights	Key Sources
Proactive comms and resolution of service issues (5/5)	Stakeholders are reliant on Thames Water maintaining good customer service levels and investing to improve the network. MPs and LGAs who continually deal with complaints from their constituents/wards are much less sympathetic to missteps. (S39) The biggest concern is from political representatives on the lack of responsiveness and proactive engagement around more localised and often repeat incidents (i.e. a burst water pipe causing damage). MPs and local councillors would appreciate more direct contacts and regular dialogue around progress being made to the network, and to their constituency/ward. (S39) There are still concerns over an emerging two-tier communication system wherein issues are only dealt with once escalated to the relevant stakeholders. However less so than in the 2021 research. (S39)	Insight Sources v18: S39 Stakeholder Reputation Research Report. March 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Detailed Insights
Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Providing an empathetic customer service, which is accessible to all (1/2)	If customers have a problem, they want Thames Water to listen carefully and understand the circumstances the customer is facing, and act accordingly (PR24-2) If customers have any particular challenges, such as financial or health issues, they want Thames Water to acknowledge this and ensure that they have the right kind of support in their dealings with them and the services Thames Water provide (PR24-2) Some customers who had dealt with Thames Water before and found the staff to live up to these values. (PR24-2) Negative sentiments are largely driven by a minority who have had a bad customer experience with Thames Water previously, claiming they lacked empathy and required better training on the systems to better tackle individual issues. Customers identified "taking too long to resolve issues or attend", "insufficient help given on the first contact", "promises not kept" and "failure to call back" as pain points. (CX120, CX121) There is a growing expectation that organisations need to be proactive in protecting the interests and well-being of all their customers, including vulnerable customers. (PR24-2) Some customers feel that our polices are like a 'straight jacket'; Thames Water's people are not empowered to flex the policy when needed to ensure the right outcome for the customer is achieved. (CX100) We are not giving our people the skills to 'read between the lines' when customers are having uncomfortable conversations about their circumstances, meaning they don't spot financial vulnerability. Nor are we equipping them with the coping skills to deal with these conversations. (CX100) The application process can be high effort and complexed for some customers to navigate through. Customers can be left feeling like their application has gone into a 'blackhole' when the process takes longer than they'd expect. (CX100) Customers who have recently moved to areas we serve prefer receiving a welcome letter in the post or via email instead of a phone call, as this allows them to go through the information at their convenience. (CX32) We should offer multiple methods of communication for elderly customers, including postal options. (CX32) Vulnerable customers expect us to provide accessible contact methods to ensure disabled customers and those for whom English is not their first language aren't excluded. (CX27, PR24-2) Some had felt that call centre staff discriminated against them due to their accent. In contrast, a family member with a British accent had received a more compliant and helpful response. This was also mentioned by a Somali intermediary organisation who the company on behalf of a customer who had spent two months trying to get a leak addressed but felt that they were not taken seriously until the intermediary stepped in. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 CX120 C-MeX CES and Brand Survey Q1 23-24, August 2023 CX121 Heartbeat of customer insight, August 2023 Insight Sources pre-v17: CX100 UX - Affordability persona insight discovery 2021 (part 2), October 2021 Insight Source v16: PR24-2 PR24 Foundational Research Customer Voices, November 2021 CX27 Affordability Re-imagined Journey Design Workshop Playback from 21/10/21, October 2021 CX32 Customer Voices – Welcome Letter Evaluation, August 2021

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Customer experience

Stakeholder views | Detailed Insights | Segmented Insights | Vision 2050

Sub-topic	Detailed Insights	Key Sources
Providing an empathetic customer service, which is accessible to all (2/2)	Vulnerable customers want to feel like they are being listened to and our customer service staff treat them with empathy and understanding. Customers also want us to ensure the best possible service is given especially to the elderly and disabled. (CX27, PR24-2) For some of these groups, vulnerability may be temporary rather than permanent. Individual circumstances inform customers' specific needs. Customers with hearing disabilities following up on discounts on their bills find it difficult to communicate with our agents over the phone. They would prefer to communicate via email (CX27) Some [vulnerable customers] who had who had had direct experience of contacting Thames Water had found the company really supportive and helpful (especially during the pandemic) (CX113) NGOs in customer protection see areas for improvement Ensure there are channels for NGO stakeholders to escalate issues as and when they are helping a vulnerable customer. (S39)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 S39 Stakeholder Research Report, May 2023 Insight Sources pre-v17: SP12 Vision 2050 Research. May 2022 CX27 Affordability Re-imagined Journey Insight Discovery. October 2021 PR24-2 PR24 Foundational Research Customer Voices, November 2021
Vision 2050: *Provide an easy and personal customer service, using the latest technology, for everyone who uses the service (Ranked 17th / 19 Vision 2050 goals tested with customers)*	Many customers expressed the importance of having a line of communication they can access if a problem occurs or to receive important information. Additionally, it's important for customers to feel connected with Thames Water and their customer service facilitates. However, some feel that this isn't an urgent issue as not all customers have a frequent need to contact customer services. (SP12) The goal is largely supported by customers, however, the majority want customer service improvements to be implemented within 5 years. Customers support improvement in technology to facilitate customer services in order for Thames Water to catch up to other companies. (SP12) 86% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most feel it should be a high priority for Thames Water to actively improve their customer service. However there must be more clarity on what changes will be introduced for customers to make the most use out of services. (SP12)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support

Billing

Insight synthesis

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.

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

CS1. I want an easy customer experience and tailored support / Billing

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Water meters and billing	The majority of non-household customers (88%) believe it is important that their water and sewerage bills are based on meter reads rather than estimates (CX35). 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 (CX35). 80% of sole traders believe bills based on meter reads rather than estimates is important, stating this is because they want to be charged for what they use (CX35). Most non-household customers use their meter/consumption data for billing and financial forecasting (CX42) All retailers and third parties saw smart water meters as a natural progression for water metering moving forward. They believe smart meters will mean improved accuracy and reliability of data collection. (CX42) Only 44% of customers are aware of Thames Water offering installation of smart meters to reduce bills for those struggling to pay their bills (CX126)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 CX126 Vulnerability insight report 2023-2024 Q1, August 2023 Insight Sources pre-v17: CX55 Billing Content: Testing Insights, December 2021 CX35 CCW research on SME customers' preferences for meter reading frequencies, August 2021 CX42 non-household smart meters and data research, July 2021 CX46 Bill Redesign Research: Qualitative Debrief, August 2021
Bill design	Customers see the new bill design as more aesthetically pleasing and it fosters greater confidence and understanding. (CX46) Participants found the information and layout of the new bill clear and revealed that the priority is the amount, revealing they would only check the calculations or additional information if there was an issue. Some felt there was too much information in the PDF guide to skim through. (CX55) The new design is preferred by all customers in comparison with previous bills and they believe it communicates greater transparency and care from Thames Water. (CX46) Customer feel that the contact section of the bill uses language, visuals and layout to show customers that Thames Water cares about vulnerable audiences, which is important to them. The 'struggling to pay' section is especially well received by customers. (CX46) Some customers find some of the fine print to be overwhelming and confusing, and some were confused by the use of both the terms 'rateable' and 'chargeable' value. Clear communication on the billing period and the different rates is important. (CX46, CX55) The majority of customers found the options on the financial support page useful, and many were pleasantly surprised at the different options available. Most advised they would look through the options to see which they were eligible for. However, some felt that during a stressful time the number of options may be overwhelming to look through and that it is a lot to read. (CX55) Some customers said they would call Thames Water if they couldn't afford to pay their bill due, however, they felt the tone of voice on the financial support page was friendly. Some found information about the PayPoint card confusing. (CX55) Some participants suggested Thames Water focus support on people at the stress point of setting up home (especially for the first time). Examples from participants include providing information proactively to new tenants and providing information and support to students via universities to explain responsibilities and step-by-step processes to make billing less daunting. (CX113)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Billing

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Vulnerable customer insights on billing and metering	There were mixed levels of understanding relating to bills: white customers and minority ethnic customers brought up and raised in the UK talked confidently about their bills and what they were being charged for. Many showed little interest and paid little attention beyond the headline figure of what was owed. (CX113) Many found their water bill confusing, in particular the water/wastewater split, how costs were calculated and why they had received significant increases in their bills or changes to their payments. Changes to bills added to a sense that water bills were opaque and unpredictable. (CX113) Some felt there was a lack of transparency over how the water bill is calculated (as outlined in the section on water billing) sometimes led to disbelief about how much money is owed. Some felt that their water bill keeps increasing but without any justification. (CX113) Many had difficulties with mobility and dexterity, which affected their ability to read meters, and made them more susceptible to falls in the home. (CX113) Participants said it was hard to control usage (and therefore costs), for several reasons: • Some felt they had stripped back their usage to a bare minimum, but as water is a necessity, they were unable to reduce or change usage beyond their existing water-saving measures (in contrast to electricity or gas, where there was felt to be more scope to reduce and find some alternatives); • (Metered) hard to know how much water being used daily or how much this costs because water meters are not easy to read (in contrast to smart meters for electricity and gas) and because bills came infrequently, it was hard to track how usage affects cost; • (Unmetered) participants in smaller households said they were charged the same as friends with big families. (CX113) • Support organisations also encouraged Thames Water to work with them, for example, running workshops and providing information and resources (e.g. videos in key languages). The kinds of messages they thought would be helpful include how water is charged for – that it is separate to rent; support available if struggling financially; the need to report meter readings when move house (so you're not charged for water you haven't used); and how bills are calculated. (CX113) Some customers were also unaware of the range of payment options available to them. (CX113) For some, receiving a water bill was a relatively new experience, as their water had previously been bundled in with their rent. The switch to direct billing had been difficult for several participants: it was perceived to be more expensive and it was another thing to think about. For some – particularly those from minority ethnic backgrounds and those with limited English – the switch to direct billing came as a shock, and they struggled to understand it. Some of the support organisations reported that they had needed to support their service users by explaining the change and what it meant for them. (CX113) The majority of participants either did not have a meter or were unaware whether they had one. Of those who had meters, almost none had taken a reading, and many did not know where their meter was. Most assumed Thames Water would take the reading (though some complained that this did not happen, and that they still received estimated bills). Some said that they could not read their meter due to visual impairment or limited mobility, and they felt more reliant on support from Thames Water to read their meter (or install a smart meter). (CX113)	Insight Sources v18 CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Insight synthesis

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 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.

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Communication preferences of vulnerable customers (1/2)	Via phone In terms of the type of problem, many said they would choose to phone an organisation if it was urgent, complex or if it involved affordability options. There was a sense that problems were more likely to be resolved more quickly by talking to someone directly (even if it meant being on-hold for a long time on phonelines). There was also a hope that there would be a more empathetic and understanding response if people could explain their situation over the phone (compared with email or online chat, for example). (CX113) Several participants talked about the importance of them having a record of what was discussed and agreed. In part, this was because they could not always remember, but also because there was some lack of trust that companies would stay true to their word (reinforced by experiences of inconsistency and broken promises. As a result, some made notes or wanted an email follow-up listing out what had been agreed. (CX113) The time taken to deal with problems by phone was a real burden for some. Some talked about call times lasting several hours. Participants in acute poverty faced an added issue of needing to cover the costs of a long call – even if it was a freephone number, they had to charge their phone, using precious electricity. (CX113) Online/email and digital exclusion Some preferred accessing support and dealing with problems online or via email. They liked that they could do this in their own time, and that they had a ready-made audit trail. this option was not open to participants who were digitally excluded. Some lacked digital skills (and – in some cases – English literacy), and many of these participants relied on their children to find information for them, email organisations, make payments, and set up online accounts. However, this reliance placed a burden on their children, and also meant they had less agency over their affairs and their problems. (CX113) Some participants did not have digital access because they could not afford broadband or data on their phones. As a result, they relied on using public spaces (free Wi-Fi; computers in libraries) to use email or online resources to deal with issues, meaning they could only do it at specific times, and for limited periods. (CX113) Digital exclusion goes beyond just not using the internet; the complexity of many tasks can cause exclusion and mean some people pay a premium for goods and services. (CX90) Digital exclusion was more common amongst some ethnic groups, for a number of reasons, including being linked to lower levels of education/literacy, inexperience in using digital devices, and some nationalities e.g. Eastern European and South Asian not being used to an 'online culture' i.e. dealing with things in person or over the phone. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 Insight Sources v17: CX90 Vulnerability Desk research slides, November 2022

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Detailed Insights

Segmented Insights

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Sub-topic	Detailed Insights	Key Sources
Communication preferences of vulnerable customers (2/2)	Digital skills and confidence is often linked to education and literacy. Other countries have less of an 'online culture' which can be difficult to adjust to when moving to the UK. Often the preference is to deal with issues over the phone (CX113) Lack of digital skills can also impact peoples' ability to find employment and improve their financial situations, as well as research what support is available to them and make applications (CX113) Some who lacked digital skills relied on their children to find information for them, email organisations, make payments, and set up online accounts. However, this reliance placed a burden on their children, and also meant they had less agency over their affairs and their problems. (CX113) **Language** Language also played a role in people's experiences, and was a key vulnerability risk factor. Within the scope of customers who do not have English as their first language, there is a spectrum of English language competence and confidence, from almost no English at all (reliant on family, friends and community members to translate and interpret in their day-to-day interactions) to confident in conversing in English, but could not (easily) read or write in English. (CX113) Those who lack English language skills often also lack digital skills. These customers relied more on their children (and for some – friends) to translate, advise, and make phone calls on their behalf. This was also apparent amongst a minority of White British participants, for example, one woman who 'hates computers' relied on her daughter to manage accounts and bills online. (CX113) Many customers who were new to the UK did not know what support was available to them, and particularly minority ethnic participants, especially those not brought up in the UK, and faced a further language barrier, and lack of digital skills to research online. Information on support is often only available in English and therefore fails to get the message across to minority ethnic groups. (CX113) Communication barriers were not limited to language: several participants said they experienced social anxiety and lacked confidence speaking to people. Having to pick up the phone caused a lot of stress for some of them, and some with limited English/strong accents reported experiences of dismissal or even hostility whilst contacting companies for help. (CX113) Participants with limited English said these calls took even longer for them due to the language barrier, and because they often had to draft in family members to translate, meaning a three-way conversation. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Detailed Insights

Segmented Insights

CS1. I want an easy customer experience and tailored support /

Vulnerable customer support

Sub-topic	Detailed Insights	Key Sources
Understanding the drivers of vulnerability	For vulnerable customers, the use of water and management of wastewater to meet their needs can be affected by i) Faith, culture, past experiences can affect usage and attitudes; ii) Medical conditions, family size and lifestage can affect needs; and iii) Income (CX90, CX113) For vulnerable customers, being able to afford and manage their payments can be affected by i) income and costs of living (NB poverty premium and disability price tag); ii) Life experiences (job loss; new baby; retirement; divorce; bereavement); iii) Access to public funds; and iV) Health & wellbeing: Cognitive or developmental conditions; poor mental health; 'headspace'/ cognitive load/ energy; memory issues (CX90) For vulnerable customers, being able to understand and represent their own interests can be affected by i) Inexperience and confidence; adverse life experiences; ii) Ability to read and communicate in English; iii) Renting/ bundled bills; abusive/coercive controlling relationships; iv) health & wellbeing: Cognitive or developmental conditions; poor mental health; 'headspace'/ cognitive load/ energy; memory issues; v) Digital confidence and access; and vii) Time (CX90) Particularly for those who had recently arrived in the UK, and even for some customers who had been living in the UK for some time, many found it difficult to get to grips with the systems and processes in the UK, made more difficult by other factors such as language barriers, the challenges of settling themselves and their families into a new country or trauma experienced from fleeing a war-torn country. (CX113) Non-native English speakers with limited English-speaking abilities, or indeed native accents, can lack confidence in seeking support due to often not being understood or fear of facing hostility resulting from negative stereotypes. (CX113) Thames Water's diverse customer base have needs varying in specificity, depending on a number of factors, including i) length of time in UK; ii) language; iii) experience of paying household bills; iv) confidence managing bills and suppliers; and v) support network in the UK (CX90, CX113) It should also be noted that there is lots of overlap in vulnerabilities e.g. those with physical health issues sometimes had underlying mental health needs and these tended to cause financial pressure (not being able to work, etc). It's important to note that not all customers in vulnerable situations are financially struggling - some older customers retried early and are in good financial state, others have young children and are financially secure and some have sought help with their bills. (PR24-14)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023 PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023 Insight Sources v17: CX90 Vulnerability Desk research slides, November 2022

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Priority services register (1/2)	The vast majority of customers on the Priority Services Register (PSR) are satisfied with the services we provide. Very unsatisfied customers want us to improve our response to resolving issues both in terms of communication and long wait times. They are also concerned about bills being too expensive or being overcharged. (CX84, CX126) Though there is a low level of awareness and understanding of our Priority Services Register, customers are supportive of the idea and would like to be told more about it. (PR24-1) Overall awareness of any vulnerability support remained at 49% at Q1 2023/24, but still lower than 20/21 (52%). Awareness is lower for ALL features of the PSR compared to last year, apart from the Priority Services Register itself. Disabled customers and those 65+ are marginally more aware of PSR features. (CX84, CX126) Latest figures show less than half of vulnerable customers are aware of any vulnerability support available for them. Awareness of features is either the same or lower for almost all features of the PSR than the previous year and it was revealed that several elements of the PSR are more well known than the term Priority Services Register itself (CX126) (Q4 22/23 in brackets (CX119)): • Priority Services Register 18% (14%) • Support when water supply cut off (bottled water) 21% (24%) • Alternative formats such as braille or large print 23% (24%) • Help for deaf/hard of hearing 18% (17%) • Doorstep password scheme 10% (10%) • Ability to add carer/family member to accounts 9% (9%) • Language translation service 8% (11%) Stakeholders have raised that the needs of elderly people are becoming more acute; future Priority Services Register sign up targets and services will become even more important. (S14) 96% of customers over 80 were happy to be automatically enrolled onto our Priority Services Register. PSR auto-enrolment does not damage their impression of us and in some cases it enhances it. Some customers say they trust us more as a result of the registration and found the autoenrollment very considerate and thoughtful. (CX38) However, a sizable minority say they'd have preferred to be consulted first. Customers that remember receiving our letter/email informing them about the auto-enrolment are less concerned. (CX38)	Insight Sources v18: CX119 Vulnerability insight report 2022-2023 Q4, May 2023 CX126 Vulnerability insight report 2023-2024 Q1, August 2023 Insight Sources v17: CX84 Vulnerability insight report 2022-23 Q1, August 2022 Insight Sources pre-v17: CX38 Over 80s Priority Services Register auto-enrolment Follow up customer research, April 2021 PR24-1 PR24 Foundational Research - An analysis of customer views and expectation of Thames Water, November 2021 S14 Stakeholder Reputation Research, March 2022

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Stakeholder views

Detailed Insights

Segmented Insights

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Sub-topic	Detailed Insights	Key Sources
Priority services register (2/2)	The customers who disagreed with auto-enrolment felt it was courtesy to give them a choice, some had data security or scam concerns or felt they didn't need the service, and some wanted to know more about the service. (CX38) A number of issues were identified relation to the effectiveness of the PSR scheme by participants who were on the register. Examples include not receiving notifications about supply disruptions; not receiving bottled water; and Thames Water not reading meters. (CX113) NGO stakeholders continue to score Thames Water the most favourably among the different audiences. For NGOs who specialised in customer protection, this was due to a greater focus being afforded to targeting customers in vulnerable circumstances and collaborations with third parties such as citizen advisory organisations and NGOs. This was also spontaneously brought up by regulator/decision maker and LGA stakeholders. (S39) NGO stakeholders continue to score Thames Water the most favourably among the different audiences. For NGOs who specialised in customer protection, this was due to steps taken by Thames Water to establish a shared priority register list with other organisations. (S39) Stakeholders speak positively of Thames Water's increased focus and collaborations to target customers in vulnerable circumstances. (S39) Vulnerable customers would like Thames Water to promote the PSR more widely in support groups and through community centres. There were a number of ways participants suggested Thames Water should circulate information, such as through churches/mosques, credit unions, local councils/councillors, universities, landlords/housing associations etc, community events and social media. (PR24-14) There was no recall of any communications about the extra help propositions from Thames Water (either affordability or PSR). In contrast, many referenced communications from energy companies promoting the message, 'Don't suffer, we can help'. Several participants questioned why the company isn't publicising the schemes. (CX113) Some participants who were on the PSR felt that it needs to be easy to access services when needed and it is important for the service to work as advertised to demonstrate a real commitment to supporting people (rather than paying lip service). (CX113)	Insight Sources v18: S39 Stakeholder Reputation Research Report. March 2023 CX113 Vulnerability Deep Dive Research, April 2023 PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023 Insight Sources pre-v17: CX38 Over 80s Priority Services Register auto-enrolment Follow up customer research, April 2021

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Detailed Insights
Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Supporting customers with specific needs (1/3)	**Customers with disabilities and medical conditions** Water quality, pressure, interruptions to supply and restricted toilet use can be of particular concern to customers with specific medical conditions or disabilities. (PR19-63) In particular, those with high water use due to a medical condition may rely on an uninterrupted supply for their treatment and there is some concern that we may not appreciate the potential risk to their health caused by any outage. (PR19-63) They may also be more concerned about metering and the impact on their bill when they are water reliant. (PR19-63) These customers can require additional support and understanding when experiencing different customer journeys, due to anxiety and other conditions which may be impacted by any disruption to their normal routine. (PR19-63) There is a wide diversity of experiences of disabled people and the ways in which disabilities affected people's lives. For example, some people experienced ongoing pain and mobility issues, which meant they were unable to work, and that leaving the house was an effort, whereas others had more full and active lives, and had found ways of adapting to their disabilities (for example, adapting to life with a prosthesis following the loss of a limb; using an adapted car). (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 Pre-2020 Insight Sources: PR19-63 CR08a/b Deliberative overlays, BritainThinks, March 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights
Supporting customers with specific needs (2/3)	**Customers with mental health issues or learning difficulties** Customers with learning difficulties can require additional support and understanding when experiencing different journeys. (PR19-46) 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. A couple of 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. (CX100) Poor mental health can impact customers' ability to choose (i.e. getting the right deal and taking out unaffordable credit) and pay (i.e. controlling finances, dealing with income shortfalls and unexpected changes) for services, as well as dealing with problems with the service received (i.e. return goods and deal with debt). (CX90) Beyond those who declared mental health issues, it was clear that a number of vulnerable customers were experiencing high levels of stress, and many talked about anxiety. Some were also dealing with the aftermath of domestic abuse and coercive and controlling behaviour. (CX113) There is lots of evidence of the way in which poor mental health can make people vulnerable to detriment in the utilities markets e.g. • Lack of headspace, confidence and energy to face and deal with bills, arrears, and problems; • Financial impacts, including the consequences of ignoring bills and arrears, which could create a vicious cycle of stress and avoidance, and spending compulsions and forgetfulness • Anxiety about contacting organisations, particularly to sort out problems (with evidence that some participants catastrophised their situation and the likely response). • Anxiety being triggered by the arrival of bills, payment reminders, and arrears letters (CX113) Communication barriers were not limited to language: several participants said they experienced social anxiety and lacked confidence speaking to people. Having to pick up the phone caused a lot of stress for some of them. (CX113)

Key Sources

Insight Sources v18:
CX113 Vulnerability Deep Dive Research, April 2023

Insight Sources v17:
CX100 UX - Affordability persona insight discovery 2021 (part 2), October 2021
CX90 Vulnerability Desk research slides, November 2022

Pre-2020 Insight Sources:
PR19-46 EX18 Essential services and people with mental health problems, Britain Thinks, May 2018

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CS1. I want an easy customer experience and tailored support / Vulnerable customer support

Detailed Insights
Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Supporting customers with specific needs (3/3)	Age Older socially isolated people can be particularly concerned about leakage and the impact on bills. (PR19-65) They tend to have limited interest in planning for the future and feel their water use is limited. (PR19-65) Older customers (75+) have a stronger preference for maintaining current service levels. (PR19-65) Age alone does not necessarily create vulnerability, but increases likelihood of other risk factors, including i) younger age/inexperience; ii) disabilities/long-term conditions; iii) caring responsibilities; iv) bereavement; v) memory and cognitive decline; vi) lower digital access/confidence; vii) lower income (CX90) Youth experience vulnerability and it's important to think about how we can ensure our services and priorities for investment reflect the needs of vulnerable youth - Consider that conversations with social workers and heads of schools may be a good place to start to understand the challenges youth are facing and what that means for us at Thames Water (S26)	Insight Sources v17: CX90 Vulnerability Desk research slides, November 2022 S26 Research Summary Form - PR24 Youth session, July 2022 Pre-2020 Insight Sources: PR19-65 CR29b WRMP Stage 2, BritainThinks, December 2016
Impact of water outages on vulnerable customers	Customers with disabilities and health conditions say it would be more difficult for them to adapt in the event of a water shortage and want Thames Water to prioritise them in an emergency. Hosepipe bans would not have a significant impact but an Emergency Drought Order (a limit on water supply for up to three months) would and is something they would be open to paying more for to reduce this risk. (PR19-65) Those with mental health conditions note that severe water restrictions could significantly impact their mental wellbeing. (PR19-65) Customers with mental health conditions can have very loose support networks and may not have anyone that they can count on to help them in an emergency. More frail customers would find it difficult to cope themselves in an emergency. (PR19-65) Severe water restrictions such as rota cuts (water supply limit imposed on different areas by rotation) is something vulnerable customers can cope with; however, it is important to note that these customers tend to be reluctant to admit they require support. (PR19-65) Customers with mental health problems across all regions consider it relatively easy to deal with water companies, compared with other utilities, as they do not have to think about choosing a supplier, or do not worry about the risk of the service being cut off. (PR19-65)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Insight synthesis

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.

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights
Value for money	With continued economic uncertainty and introductions of bill increases this quarter, satisfaction with value for money metrics reached their lowest scores to date in Q4 2022-23. Satisfaction is particularly low amongst those who struggle to pay their bill at least some of the time. (CX114) Whilst value for money and the price charged remain well below 50%, we have seen a small increase in the first quarter of 2023/24 (CX120) There has been a significant decrease in perceptions of value for money and trust in water companies across all areas e.g. clean drinking water, value for money, providing reliable service etc. (R36) More recently, likely due to the ongoing cost of living crisis, only 4 in 10 customers trust their water company to provide value for money, however, only around a third think this would matter most to them if they could choose their water company (R53) With regards to customer bills, high value for money scores were given to Thames Water for bills being low relative to other bills, and no issues in drinking water and sewerage. On the contrary, low scores were given for poor water quality issues. Low income customers struggle with their bills and want to see water meters reduce/control their bills. (PR24-14) Around two-thirds of our customers are disengaged with Thames Water (i.e., they generally do not have much interaction with us other than paying their bill). We need more of them to feel they receive a high-quality, reliable service from us, and recognise the scale of work that we do, to improve perceptions of value for money (CX24, CX62).
Affordability for household customers (1/2)	The cost of living crisis is dominating the public mood (PR24-12, CX113) and has likely impacted how customers view the prices charged for water and wastewater services, dissatisfaction with which has reached its highest levels. (CX114) Cost of living crisis is affecting all customers to a varying degree. Some customers notice that costs are going up, but this isn't affecting them at the moment. Other customers are making lifestyle changes to factor in the increasing costs and others are struggling to pay their bills. (PR24-14) Customers who are 'Just About Managing' use a lot of 'mental effort' to keep heads above the water, and are often thinking/worried about any large unanticipated costs which might come in. (CX113) Future bill payers want a role in influencing what their bills will look like, however, also expressed a desire to pay more for things like improving the environment and being more sustainable. (S26) For the majority of household customers, water charges are typically considerably lower than other utility bills. As a consequence, concerns about value for money and affordability may be directed elsewhere, towards energy companies where charges are a greater proportion of customers outgoings. (PR24-2)

Key Sources

Insight Sources v18:
CX114 C-MeX CES and Brand Survey Q4 22-23, March 2023
CX113 Vulnerability Deep Dive Research, April 2023
CX120 C-MeX CES and Brand Survey Q1 23-24, August 2023
PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023
R53 Ofwat - Cost of living: Wave three - water customers' experiences, May 2023

Insight Sources v17:
PR24-12 PR24 Enhancement Package Options research , September 2022
S26 Research Summary Form: PR24 Youth Session, July 2022
R36 Cost of living diaries, BritainThinks, November 2022

Insight Sources pre-v17:
CX24 Brand Survey (Q3 2021/22), December 2021
CX62 Brand Survey (Q4 2021/22), March 2022
PR24-2 PR24 Foundational Research - Customer Voices, November 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights
Affordability for household customers (2/2)	Overall, sentiment on water bill affordability has been around 54% positive, with only 16% negative. At the highest level, customers want a bill that is affordable, accurate and easy to pay. This is reinforced by words such ‘fair’ and ‘easy’. (PR24-2) Most accept the current cost of their bill and believe the business would help customers who were struggling to pay. (PR24-2) Customers consistently identify affordability for all customers as the key factor when developing long term drainage and wastewater management plans, with a large majority selecting this as one of their top 5 factors. Customers have a more mixed response to ensuring value for money, with some viewing it as a priority, particularly if bills were to increase, whereas others were less interested provided their bills were affordable. (SP8) Despite the current cost of living crisis, majority of customers would rather see increase in bills sooner– this is driven largely by a sense of historic underinvestment and need for long term resilience of supply and guaranteed infrastructure investment. (PR24-14) Increasing bills now relies on understanding that Thames Water will ringfence money for specific purposes, that they will be monitored and that customers who are struggling with bills are protected with support schemes. (PR24-14) Some people were against increase bills now due to the cost of living crisis, lack of trust in Thames Water and satisfaction with existing service. (PR24-14) Customers say smart water meters have done a great job at making them more in touch with the amount of water they use while saving them money. (PR24-2) However, awareness of smart metering to reduce bills among customers is generally low (44% of customers in 22/23 and Q1 23/24). (CX126) Currently, 42% of households find their existing water and sewerage bills fairly or very easy to afford. (PR24-17)
Future affordability for younger/future customers	Cost of living/inflation was by far the most commonly chosen issue of top concern for future customers. This was followed by climate change for younger cohorts and Buying/ renting a home preoccupied the two older cohorts. (CX122) Participants in the three cohorts are aware of and spontaneously raised a range of current affairs when prompted. For most participants this includes the cost of groceries; renting or buying property; gas and electric bills; petrol for driving a car; and tickets for train travel. (CX122) The price of their water bill is not a key concern for participants, even in the context of the cost-of-living crisis. (CX122)

Key Sources

Insight Sources v18:
PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023
CX126 Vulnerability insight report 2023-2024 Q1, August 2023
CX122 Future Customers context research, August 2023
PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Insight Sources pre-v17:
PR24-2 PR24 Foundational Research - Customer Voices, November 2021
SP8 DWMP - Customer Research: Part 2 Qualitative Research: Final Report, October 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Affordability for vulnerable customers and those struggling to pay (1/4)	Cost of living is front of mind for most, particularly for less affluent customers. Significantly more households have become financially vulnerable as a result of the crisis. (R36, CX113) Customers accept paying some extra on their bill to support a discounted tariff for low-income customers. They welcome our other forms of financial assistance and urge us to better promote all our schemes to eligible customers. (CX82) Customers believe no one should be without water and that Thames Water has a responsibility to support vulnerability customers who cannot afford bills, as water should be available to all. (SP15) Most feel that customers on a social tariff should be metered and encouraged to use water efficiency measures and that the social tariff should be used to help customers on a low income or with a disability. (PR19-21, PR24-2) More broadly, the vast majority of consumers are very concerned about how higher energy bills announced in the new price cap will impact their household finances this year – nine in ten consumers think energy and water companies should be supporting people who have difficulties paying their bills. (R16) 23% customers from the sample qualify for a social tariff (up from 11% in 2018) - this number is higher amongst customers over the age of 55, lower socio-economic groups, BME communities, customers living in London, customers with disabilities, and those with low/no internet use. (CX82) 30% of households reporting they struggle to pay their water/wastewater bill in London and 20% in the South East (R53). Female customers, under 55s, lower socio-economic groups, those with a disability and unmetered customers are more likely to struggle. 42% customers who qualify for a social tariff are struggling to pay their bills vs 27% for those who don't qualify. (CX82) More people are struggling to pay their bills at least sometimes since October 2022 and fewer said they never struggle to pay. Younger people are most likely to struggle to pay their bills (78%) (R53) 50% of bill payers believed it is likely they will struggle to pay a utility bill over the next year and 86% of bill payers who reported struggling to pay a water bill over the past year expect to struggle with a utility bill in the coming year (R36) To help end water poverty, companies need to continue to evolve their engagement with those customers most at risk of financial vulnerability as a result of the changing economic situation, and learn from the affordability pilots that have explored this issue. As part of this, they may want to examine their company specific Water Matters data more closely, to see if it has any insights into knowledge gaps in their areas. (CX110)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 R53 Cost of Living Survey, Ofwat, May 2023 CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 Insight Sources v17: CX82 Social Tariff Research, September 2022 R36 Cost of living diaries, BritainThinks, November 2022 Insight Sources pre-v17: R16 Giving UK Utility Customers a Voice, February 2022 SP15 Thames Water Customer Voices Public Value Research, May 2022 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 Pre-2020 Insight Sources: PR19-21 CR58c Social Tariffs, Populus, March 2018

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Affordability for vulnerable customers and those struggling to pay (2/4)	The vast majority of vulnerable customers are worried about rising costs - many are on fixed incomes, with little opportunity to bring in extra income. Some participants were particularly concerned about how they would cope when their energy costs returned to 'normal' after the end of the Government's Energy Bills Support Scheme. Support organisations also described the anxiety and pressure created by the Cost of Living crisis. (CX113) Many participants described changes in behaviour to manage with higher costs of living: shopping in low-cost supermarkets; reducing their use of gas and electricity; changing their diet (less meat; no fruit); entertaining, traveling and eating out less. Some were also borrowing more (and more frequently) to cover essential costs and bills, either from friends or using credit cards. (CX113) Some participants said that it was hugely time-consuming to manage on tighter budgets: travelling further and to more shops to get the best deal; researching money-saving tips; and spending time on the phone negotiating with providers. (CX113) Several participants said or implied that their income did not cover essential costs (i.e. they were in negative budgets). These participants talked of using foodbanks; selling a car to pay an energy debt; and relying on donations, vouchers or gifts to cover essential costs (e.g. one Bengali woman would ask her children for money (instead of gifts) for birthdays, Eid and Mother's Day, and then use this to cover her food and energy costs). Support organisations also reported some severe impacts of the Cost of Living crisis on their highly vulnerable clients, with some significant impacts on their lives and lifestyles. (CX113) Some had been just about coping before the cost of living crisis and haven't needed to ask for help before. These are new pressures and they find it hard accepting they cannot cope, and they do not know where to turn. Financial pressures mean people need short term loans more frequently, but friends and family they may have relied on previously are now also squeezed and cannot help. (CX113) Support organisations are overloaded and/or have reduced capacity. Citizens Advice was cited several times as an organisation that is hard to access now, as support has gone online/ via phone lines and appointments are very hard to come by. However, participants mentioned similar issues with other organisations too. (CX113) There was some presumption that everyone is suffering, and therefore you just have to put up with it, or you assume others are more deserving. (CX113) Many found their disabilities or health conditions had a financial impact and many were on low incomes and in receipt of disability benefits. (CX113) Many of the participants with disabilities and health conditions talked about the financial impacts of this . Many were not working due to their poor health, pain, or poor mobility. As a result, they were reliant on benefits, and on fixed incomes. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Affordability for vulnerable customers and those struggling to pay (3/4)	Many people were juggling multiple issues in their lives, and these were frequently overlaid with affordability and debt issues. Beyond meeting daily living costs, participants were dealing with problems relating to: - Their own disabilities and/or those of their children; - The aftermath of domestic abuse; - Caring for relatives and coping with bereavement; - Setting up accounts for a new home, and closing accounts when moving out; - Family issues and breakdown (CX113) 1 in 3 customers struggle to pay their water bill (up from 27% in 2022). This is significantly higher among younger customers, C2DE, BME customers, those with disabilities and those in London. (CX128) 2 in 5 (40%) of those we spoke to say they never struggle to pay their bill, whilst 42% do struggle to pay their bills at least sometimes. (PR24-17) Females in particular struggle to pay their bill at least sometimes, with 54% saying they struggle to pay at least sometimes (compared to 27% of males), this is a statistically significant difference. 52% of males says they never struggle to pay their bills compared to a significantly lower proportion, 28%, of females. (PR24-17) 70% of SEG DE and 55% of C1C2 say they struggle to pay at least sometimes, compared to only 40% of SEG AB – this difference is significant. (PR24-17) Given the current economic situation, it is perhaps unsurprising that half of the household participants (50%) we spoke to are finding it difficult to manage financially or are just about getting by. Again, females (59%) are significantly more likely to be struggling to manage financially compared to (40%) males. (PR24-17) Alongside 60% of those that self-selected as vulnerable, 79% of SEG DE and 58% of C1C2 also struggle managing their finances – statistically significantly when compared to those to those non vulnerable (40%) and other social grades (AB 34%). (PR24-17) Close to 2 in 5 households (39%) expect their financial situation to worsen in the next few years. This increases to 42% among those that have difficulties paying their bills. (PR24-17)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023 PR24-17 Acceptability and Affordability Testing Quantitative Research, August 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Affordability for vulnerable customers and those struggling to pay (4/4)	NGOs in customer protection highlight that, against a backdrop of increasing household costs, Thames Water has a great opportunity to better communicate their financial support schemes. (S39) Vulnerable customers would like Thames Water to provide more support to customers struggling to pay their bills. (PR24-14) A minority of customers feel they struggle to pay their bills but only a few get financial support with their water bill. A consistent 4~6% of Thames Water customers always/frequently struggle to pay their water/waste bill, and around 17% always, frequently or sometimes struggle to pay their bill. (CX119, PR19-63) Financial assistance is appreciated by those who receive it, but they suggest we could be more proactive at an earlier stage. (PR19-63) Customers on low incomes and/or receiving financial support are more likely to be concerned about the affordability of bills. They are more likely to try and use less water to save money, more likely to be concerned about metering in case it increases their bill and are concerned about leakage and its potential impact on their bills. (PR19-63) Low-income customers 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. (PR19-63) Customers think each generation benefits from past investment and so current customers should expect to do the same for future generations. (PR19-4) More broadly, around a third of consumers are struggling to pay bills at least some of the time and around one in eight claimed to struggle all the time. Nearly half of those struggling 'all of the time' have borrowed money from friends and family and a third of whom have received financial help from water companies. (R14, R53)	**Insight Sources v18:** PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023 S39 Thames Water Stakeholder Research. May 2023 R53 Ofwat - Cost of living: Wave three - water customers' experiences, May 2023 CX119 Vulnerability insight report 2022-23 Q4, May 2023 PR24-17 Acceptability and Affordability Testing Quantitative Research, August 2023 **Insight Sources pre-v17:** R14 CCW + Ofwat Customer Spotlight Report – Peoples' views and experience of water. April 2022 CX42 non-household smart meters and data research, July 2021 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 **Pre-2020 Insight Sources:** PR19-4 CR19, Intergenerational Fairness. PR19-63 CR08a/b Deliberative overlays, BritainThinks, March 2016
Affordability for non-households customers (1/2)	Most non-household customers feel they receive the appropriate data services necessary for activities related to their water usage; non-household customers may use water usage data and its associated costs to completing bill payments or creating financial forecasts. (CX42) Non-household customers are increasingly interested in more accurate, more granular consumption data due to short-term post-covid planning, medium term focuses on cost reduction and longer-term necessity of focusing on sustainability. The degree of engagement with metering/consumption data mainly depends on the size or type of business. (CX42) For non-household customers, proven, long-term benefits (e.g. avoiding the unexpected costs of future leaks) is central to their willingness to pay upfront for further data services. (CX42) Close to half of (46%) businesses say they never struggle to pay their bills, but almost a quarter do have some difficulty paying their bills (24%). 2 in 5 (40%) of businesses are operating with financial difficulty. Only 18% saying they are operating comfortably. (PR24-17)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Vision 2050

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights
Affordability for non-household customers (2/2)	Over half the businesses (51%) of businesses expect their financial situation to improve in the years to come and only 16% expect it to worsen. (PR24-17) Businesses have varied understanding of smart metering and the potential data services Thames Water could provide. We need to educate business customers alongside any additional data services that might be offered to businesses directly or indirectly, about the limitations and benefits of smart meters and the additional services which could potentially help support wider business needs. Education and trial periods may make them more willing to accept upfront costs. (CX42) When asked about value for money of potential data services Thames Water could offer non-household customers (data analytics, water efficiency and leakage monitoring), the majority feel that £10-20 per month on top of their current bill is acceptable, whilst for others, 3-10% more per year feels more reasonable. (CX42) 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. (CX42) 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. (CX42) Cost of water is an overriding concern, especially for small businesses, which leads to some customers being reluctant for bill increases. Although customers feel that water is cheaper than gas/electric, they express a desire for Thames Water to be more proactive and incentivise customers to save water, and money. (PR24-14)
Vision 2050: *Keep bills affordable and show that services are value for money (Ranked 5th / 19 Vision 2050 goals tested with customers)*	Keeping bills affordable and showing that services are value for money are important issues for most customers due to the increase in the cost of living. Showing good value for money takes on a greater importance, with customers wanting to know their money have been spent well. (SP12) The goal is largely supported by customers. It feels achievable and realistic, however, a small minority are sceptical about how the goal will be achieved and feel Thames Water should better define their plan for this. (SP12) 88% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most feel this is sensible for Thames Water to be involved in and help customers, particularly the ones in most financial need. However, for many the 2050 goal feels too far away; customers want to see a positive change in their bill savings now. (SP12)

Key Sources

Insight Sources v18:
PR24-14 Acceptability and Affordability Research Qualitative Findings, May 2023
PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Insight Sources pre-v17:
SP12 Vision 2050 Research. May 2022
CX42 non-household smart meters and data research, July 2021

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Factors affecting customers ask for help and deal with debt	Culture and religion play an important role in peoples' perceptions towards debt; some communities were proud and self-reliant when it came to debt and finances (e.g. African and Caribbean communities), whereas borrowing from friends and families was more commonplace amongst others (e.g. South Asian). Some religions (e.g. Islam) urge the avoidance of debt and accrual of interest (CX113) Support organisations raised the fact that some migrants can be more susceptible to accruing large debts, particularly when their immigration status is uncertain, or takes time to resolve. They talked about services users who had accrued large medical bills (including from giving birth in NHS hospitals) due to not having access to public funds. (CX113) Support organisations also suggested that – amongst people who grew up in the other countries – there is a greater fear not an understanding of how debts are managed by creditors in this country. As a result, there was a large degree of fear around the threat of debt collection. (CX113) Some of these participants had had experience of chronic debt previously. There is considerable evidence on the link between poor mental health and managing finances . There was further evidence in this research about the impact of financial stress on people's mental health: anxiety, stress and depression due to financial pressure were common themes in interviews. This research also revealed some of the specific symptoms of mental health conditions that affect people's ability to budget and meet financial obligations, namely impulsivity, spending compulsions and absent-mindedness. (CX113) There was call from those in long term debt for the company to engage with them more proactively. There was also a sense that – as their debts were insurmountable – payment plans were not realistic, and that they would never be rid of their arrears, because even the smallest monthly payment was unaffordable. This was particularly the case amongst participants whose outgoings exceeded their income (i.e. they were in negative budget). (CX113)	Insight sources v18 CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Affordability

Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Stable bills	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. (CX27) Having viewed different types of bill profile, customers overwhelmingly value consistency above all else; this is often used as a proxy for trust. Frequent bill changes are hard for customers to keep track of and undermine trust. (PR19-4) Change which results in a bill decrease is viewed differently, some customers are willing to give up consistency in favour of short-term gain, but most would still prefer to have consistency. (PR19-22, PR19-23) Significant increases to bills (£30 or more in a year) need to be clearly communicated. This is essential to maintaining trust. (PR19-4) Rising gas prices in 2021 have made customers anxious about affordability of all utility bills. Customers think water bills will increase and some feel having a water meter might help manage expenses better. (PR24-2) Customers feel easily accessible information on our website on tips to reduce water consumption and prepare for cold weather could reduce the impact of increasing bills. (PR24-2) Many customers were unsure if they even had an online account and would want guidance / support on setting up an account however, those who did pay their bills online found it straightforward to do so. (CX55) Some customers said they would compare previous bills if higher than expected, a few of whom would use their online account to do this. Some claimed to struggle to find the 'high bill' page, both from the bill and the website, and although many felt this page was not relevant to them as it focused on metered customers, they found the content useful. (CX55) Customers were frustrated that the only response / resolution they were offered by Thames Water to their high bill was to get a meter, which addresses future savings rather than the high bill they had just received. They also revealed they would phone, rather than visit the website, upon receipt of a high bill (CX55). Around two thirds of consumers said they regularly check their energy and water bills for mistakes (rising to 73% after the energy price cap rise was announced), suggesting consumers have doubts about billing accuracy. (R16) When shown the bill implications for raising the bar, customers are generally either indifferent or onboard with the breakdown and increase. Many are reassured that improvements will be made as part of the core service without the need for funding through 'raising the bar'. The bill increases feel incremental, particularly in the context of other utility bills and recent increases to the energy price cap. However, it should be noted that there is some sensitivity around discussing bill increases given the cost of living and energy crises, and as a result, some doubt around how realistic Thames' projections are. (PR24-12)	Insight Sources v17: PR24-12 PR24 Enhancement Package Options research , September 2022 Insight Sources pre-v17: CX55 Billing Content: Testing Insights, December 2021 R16 Giving UK Utility Customers a Voice, February 2022 CX27 Affordability Re-imagined Journey Design Workshop Playback from 21/10/21, October 2021 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 Pre-2020 Insight Sources: PR19-4 CR19 Intergenerational Fairness, BritainThinks, October 2016 PR19-22 CR61c PR14 Reconciliation online community task, Britain Thinks, August 2018 PR19-23 CR61b Reduced bill profile online community task, BritainThinks, May 2018

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Topics

AF1. I want fair and affordable bills / Social tariffs

Insight synthesis

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.

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

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

AF1. I want fair and affordable bills / Social tariffs

Stakeholder views

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Awareness of financial support and social tariffs (1/3)	Awareness of Thames Water giving support to financially vulnerable customers is generally quite low. (CX82, R36) Customers feel social tariffs should be better promoted to those who are eligible. Information within bill statements and leaflets sent directly to customers are seen as the most effective ways to communicate about the support available. (CX82). Other recommended ways of promoting financial support available was online and through community/public spaces e.g. GP surgeries, food banks, primary schools etc. (CX100) More generally, less than a third of consumers are aware that water companies provide financial support to those struggling to pay bills, however, only around 1 in 6 who struggle to pay their bills all of the time have received financial help from their water company. (R53) Around two thirds of customers are aware of our financial assistance offerings (excluding direct debits and payment plans), this is also similar proportion among those who consider themselves financially vulnerable. (CX119, CX82) Stakeholders representing vulnerable customers expect us to raise awareness of our social tariff and the Priority Services Register for those who could be eligible. (S8) 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. (CX84) Including the information within bill statements, emails and leafletting are felt to be the most effective ways to communicate the discounted rate, particularly for those eligible. (CX82) Latest figures show around 71% of customers are aware Thames Water provides some form of financial support. Regarding specific affordability measures, awareness amongst customers is relatively weak. (CX126) (22/23 in brackets (CX119): • Meter installed to reduce water bill 44% (46%) • Water efficiency advice and free water saving devices 32% (33%) • Different Direct Debit options 23% (29%) • Flexible payment plans 25% (24%) • Reduced tariffs for those struggling to pay bills 17% (12%) • Advice from customer service agents about paying bill 10% (12%) • Help for customer with large debt on water bill 13% (12%) • Payment holiday 10% (9%) • Referral to a debt advice service 9% (8%)	Insight Sources v18: R53 Ofwat - Cost of living: Wave three - water customers' experiences CX119 Vulnerability insight report 2022-23 Q4, May 2023 CX126 Vulnerability insight report 2023-24 Q1, August 23 Insight Sources v17: CX82 Social Tariff Research Sep 22 CX84 Vulnerability Insight Report 2022-23 Q1 CX100 UX - Affordability persona insight discovery 2021 (part 2), October 2021 R36 Cost of living diaries, BritainThinks, November 2022. November 2022 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Social tariffs

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Awareness of financial support and social tariffs (2/3)	Three quarters of household and non-household dual service customers support paying the highest charge (£9.97), acceptance being highest amongst middle aged customers and people with disabilities. The same proportion of waste only customers accepted paying the highest charge, with acceptance being higher amongst older customers, white customers and those customers not struggling to pay their bills. (CX82) Some vulnerable customers were aware that they were on affordability schemes (mostly WaterSure and WaterHelp) and are grateful for these. (CX113) A significant minority of vulnerable customers are unsure if they receive any form of discount. These participants tended to be those who do not speak English and who have been supported in their communications with the company by family or friends. For example, one Eritrean participant initially indicated that they did not receive WaterHelp only to be corrected by her interpreter who acted as her advocate and had previously helped her to apply. (CX113) Other participants knew that they were on a scheme but were confused by the detail and often the name – referring to it as 'the discount', 'WaterStart', 'SureStart' etc. Nearly all of these had found out about the schemes only when they got into difficulties with bills, or because a friend/ family member had mentioned them. A handful had heard about the support through Money Savings Expert. (CX113) It was evident that there are some significant barriers to take up (in addition to the low level of understanding of the billing system generally and the low levels of awareness of the schemes): • reluctance to see themselves as vulnerable: this was sometimes because they were too proud to ask for help and sometimes related to a more altruistic reason i.e. others are in more need • an assumption that they wouldn't qualify for support i.e. because someone is working in the household or because they don't have certain disabilities • some were so embroiled in debt and had so many issues to deal with that they felt that the water bill was the least of their issues (because it was relatively low in comparison with others) (CX113) Some assumed that there would be some financial and other types of support on offer because water is a universal need and Thames Water is a monopoly provider. However, many participants (particularly those from Black African and South Asian communities and newer migrants) did not automatically assume that this would be the case. They, therefore, did not think to proactively search out information. (CX113) Many of the participants who were not aware of the support schemes felt, from the description given, that they would be eligible and that they would really help. This was especially the case for those relating to financial support. Many participants took the descriptions of the help available and said they would call up to enquire about them or apply online. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 Insight Sources v17: CX82 Social Tariff Research Sep 22

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills /

Social tariffs

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Awareness of financial support and social tariffs (3/3)	Awareness of Thames Water giving support to financially vulnerable customers is low at 36%. In particular, Women, ABC1, able customers and those in Thames Valley show the lowest levels of awareness. (CX128) Around 1 in 3 are likely to qualify for a social tariff to support paying their bills. This is significantly higher among older customers, C2DEs, those in London and those with a disability. (CX128) **Testing proposed tariffs with customers** After initially being introduced, almost 8 in 10 customers are in some support of the new tariff. There are no significant differences among the sub groups of those who oppose. Reasons for customers supporting the new tariff included (CX128): - Supports those who are struggling during the cost of living. - Feels fair to calculate water bills based on water consumption. - Can encourage customers not to waste water and reduce usage. Reasons for customers not supporting the new tariff included (CX128): - Thames Water should support and subsidise lower incomes and not just rely on customers. - Initial concerns that bigger families could be negatively impacted. - Less funds available from bills to go towards Thames Water's future developments/plans. Some customers felt that the discounted social tariff should be more widely publicised to increase awareness and gain support. (CX128) After seeing all the information and seeing the impact it could have on their own bill, the overall level of support remains the same. (CX128) Opposition for the new tariff is higher for those consuming high or very high amounts of water but 7 in 10 still support the new tariff, raising no immediate red flags. Very high users see the biggest shift after finding out more details, with 12% shifting from support to oppose, suggesting that careful comms are needed to show why this tariff is in place and that they have the power to reduce it. (CX128) Changes to bills is a main reason customers would either support or oppose the new tariff, making up around half of customers. (CX128)	**Insight Sources v18:** CX128 Innovative Tariffs Research, August 2023

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

AF1. I want fair and affordable bills / Social tariffs

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Provide an inclusive service that works for everybody and that everyone can afford, supporting different needs and circumstances (Ranked 12th / 19 Vision 2050 goals tested with customers)*	Providing an inclusive service is an important issue for many, and those not affected recognise the importance of helping people who struggle to pay water bills. There are some concerns around who would qualify for financial support and if the government should get involved more than Thames Water. (SP12) The goal is largely supported by both vulnerable and non-vulnerable customers. For some, Thames Water needs to guarantee a reliable system to identify customers who need financial support. (SP12) 92% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most customers feel this is sensible for Thames Water to be involved in, although some believe financial support should be co-ordinated by the Government. Although the 2050 plan feels about right to some, many would like to see this goal achieved faster. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

Topics

WT1. I want safe, high quality drinking water / Water quality

Insight synthesis

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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Appearance, taste and smell of tap water	High	Core expectation that water should be clean and safe
Do not drink notice	High	Important because linked to significant health impacts, however, emotive nature belies probability
Boil water notice	Middle	Important because linked to health impact but modified by short duration of inconvenience

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

Key evidence sources*

PR24 foundational research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 options research
WRMP - WRSE	Other external research
Stakeholder research	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.

WT1. I want safe, high quality drinking water /

Water quality

Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Appearance, taste and smell	Providing clean safe drinking water and service aspects with immediate impact or consequences, such as the appearance and taste of tap water, are a top priority for customers over longer-term issues. (R14, R15, PR24-12) We have seen a slight decrease in satisfaction with water quality since Q2 22/23 (77% to 70%). This declining trend has continued into 2023/24 (68%) (CX89, CX114, CX120). A similar trend can be seen with the safety of their tap water (90% to 84%) (CX64, CX110). However, a small minority consider it poor. People carry out a range of water behaviours (such as filtering drinking water at home, drinking bottled water) though the rationale/motivation behind these behaviours is often unclear, though there is some indication of taste being an influencing factor. (PR19-43, R13) Appearance, colour, smell and taste can be as important for consumers as other characteristics like hardness. Around 90% of customers are satisfied with the colour and appearance of their tap water, and around 82% are satisfied with the taste and smell (CX64).There is a noted difference in appearance, colour, smell and taste across the country, which can result in water-related complaints when people move to a new area e.g. North to South (PR19-14, SP3) When customers have been asked to consider service improvements that they value across a range of water services, their highest priority is to avoid any deterioration in service. They place a modest value on improving the taste, smell or colour of water. Many customers think water companies should do more to improve the taste of tap water but are unsure how this could be done, with some expressing concerns over the increased use of chemicals. (PR19-14, R13) A considerable portion of customers say that any problems with the taste, smell and colour of tap water would have quite a lot or a lot of impact on their households' day-to-day activities. (PR19-43) 1/3 customers drink bottled water at home at least some of the time, most often as they prefer the taste, don't trust their tap water and preventing limescale in appliances. (CX106)	Insight sources v18: CX114 C-MeX CES and Brand Survey Q4 22-23, March 2023 CX106 Thames Water Customer Voices Polls - Key Insights 2021-2022, May 2023 CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 CX120 C-MeX CES and Brand Survey Q1 23-24, August 2023 Insight Sources v17: PR24-12 PR24 Enhancement Package Options research , September 2022 CX89 C-MeX CES and Brand Survey Insights Q2 2022-23, September 2022 Insight Sources pre-v17: R13 CCW Water Voice - tap water survey, June 2020 R14 CCW + Ofwat Customer Spotlight Report – Peoples' views and experiences of water. April 2022 R15 Ofwat + CCW Customer Preferences Research, April 2022 CX64 CCW Research Report Water Matters 2021-2022 - Summary of research findings for Thames Water, Undated SP3 WRSE Workshop 1 Data Review (annex from full workshop document), January 2022 Pre-2020 Insight Sources: PR19-14 CR41 Stage 1 Customer Preferences, April 2017 PR19-43 EX03 Consumer attitudes to tap water, CCW, 2016
Water treatment	Improving water treatment was revealed to be a priority to a majority of customers when choosing an enhancement package but some questioned why this should be prioritised as it either should be the case already, or they felt there were no issues with water quality. Hearing that there is a risk of water becoming contaminated by harmful bacteria is alarming to many customers and members of the customer panel. The solution is also seen as relatively straight forward. As such, customers feel this could be a 'quick win' for Thames as it is perceived to be a simple solution to a safety issue. (PR24-12)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

WT1. I want safe, high quality drinking water /

Water quality

Segmented Insights | Detailed Insights

Sub-topic	Detailed Insights
Lead pipes	When told about the amount of lead pipes in our water network (which includes supply pipes that are customers' responsibility), customers are concerned, particularly with the health risk that this could pose to children. (PR24-8, PR24-12) Knowledge of lead pipes is low among customers; many are vaguely aware of the health risks associated with lead but are not sure if they should be concerned. They were not clear on how much lead in water is harmful to health and because it is not widely talked about, customers assume the amount of lead in their water supply is inconsequential. Many are not aware if they have lead pipes in their own homes and generally believe it's the homeowner's responsibility to replace them. (PR24-8) Due to the potential health risks, this was a top priority to address for customers who thought it could be a win-win on an individual and societal level – protecting customer health and replacing the ageing infrastructure (which could reduce leakage), despite some non-household customers being concerned around associated disruptions to supply. (PR24-12) Some business customers had poor understanding over responsibilities for pipes in homes vs business premises (PR24-8) Non-household customers felt that replacing lead pipes was a higher priority amongst water service improvement areas compared to household customers. (PR24-12) 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 (PR24-8)
Hardness	Less than half of customers are satisfied with the level of water hardness of their tap water (CX110). Customers feel aggravated and inconvenienced by the adverse effects of hard water. They dislike the unsightliness of limescale and the cost associated with cleaning products, softening, filtering and replacing damaged appliances. However, it is not seen as a 'top of mind' issue for a water company to act on, but rather an ongoing inconvenience. Only a small minority of customer contacts are about water quality issues and few contacts concern hardness. (PR19-11) When considering the idea of Thames Water softening water that is put into supply, customers are concerned about the use of chemicals, how long it would take, the cost and that everyone would receive soft water whether they view hard water as an issue or not. (PR19-11) Customers' knowledge about hard water is hazy or simply wrong. They often do not know it is naturally occurring and instead may think it is caused by our treatment process. Messaging that highlights hard water as naturally occurring was seen as new and interesting by customers and has the potential to improve their opinion of tap water and Thames Water as a company. (PR19-11) Some of the pros and cons of hard water, such as the health impacts, are also 'new news' that customers want to hear about. They would welcome authoritative, independent, credible information. Such communications could also have the potential to improve our reputation and customer satisfaction ratings. (PR19-11) Any endorsement of products by Thames Water is seen as useful, both making people aware of what is available, and providing confirmation from a respected source that they are effective. However, they do not think that Thames Water should subsidise customers purchasing such products. (PR19-11)

Key Sources

Insight Sources v18:
CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023

Insight Sources v17:
PR24-12 PR24 Enhancement Package Options research , September 2022

Insight Sources pre-v17:
PR24-8 Deep Dive: Lead Pipes, February 2022

Pre-2020 Insight Sources:
PR19-11 CR26e Deep dives, Water hardness, September 2016

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

WT1. I want safe, high quality drinking water / Water quality

Segmented Insights | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Perceptions of vulnerable customers of water quality and safety (1/2)	Many vulnerable customers said their water was hard or 'scaly' and in London and Reading, a notable number expressed concerns over the quality or safety of the tap water. Many said they did not like the way their water tasted, looked or smelt ('chemically'; 'cloudy'; 'gritty'; 'heavy'), and this made them doubt the cleanliness of the water or the chemicals that had been added to it to clean it. (CX113) Some customers believed that water was drawn from the Thames, which they perceived as dirty; others talked about the fact that the water is recycled multiple times; some thought it was recycled sewage water. Although they knew it was treated, they worried about residual contamination from dirt, bacteria and chemicals. Some also worried about microplastics. (CX113) Some were influenced by opinions from others that the water was not good for you (e.g. by an 'expert' who fitted water tanks). (CX113) Comparisons with water from elsewhere: those with experience of water from other parts of the country said it was better there. Notably, several of the participants from Ghana, Eritrea, and Somalia said that water they drank there was pure, clean, and 'natural'. (CX113) A couple of participants felt that water was poorer quality in the more densely populated (and poorer) areas of London. For one participant, this was due to beliefs about social inequality; for others it was a sense that the dirt and waste created by so many people would affect the water quality. (CX113) Many participants avoided drinking water straight from the tap. Instead, they chose to filter their water (all communities); drink bottled water (common across all communities, but particularly amongst Black African participants); or boil their water before drinking it (a minority, mostly Pakistani and Bangladeshi participants). (CX113) There were various reasons for drinking filtered, boiled or bottled water, including: • Disliking the taste of tap water; • Presumed better quality: this was a key driver for sticking with bottled water or filtering it – a feeling that it was 'purer', less contaminated, and better for you; • Health and wellbeing: some had switched to bottled water because they believed their health and skin conditions were caused (or at least not helped) by tap water; • Habits growing up or acquired from living abroad (which were considered hard to shake); • Expectations from family and/ or visitors (for example, when entertaining, bottled water would be provided instead of tap); • The impact of hard water on kettles. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

WT1. I want safe, high quality drinking water / Water quality

Segmented Insights | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Perceptions of vulnerable customers of water quality and safety (2/2)	Notably, even some of the participants who were under extreme financial stress were buying bottled water. They talked about buying the cheapest bottled water (20-30p; from Lidl and Aldi), and/or buying it in bulk (e.g. from CostCo). For them, it was a necessity and it was a habit that was hard to change. (CX113) Some participants drank water straight from the tap, but they were in the minority in this sample (albeit a large minority). For them, the water was 'fine', and/or they had grown up with tap water. However, some participants talked about switching to tap water from bottled, either to reduce plastic waste, or to save money on bottled water (CX113) There was also evidence that time spent living outside of the UK influenced people's perceptions of drinking water: many of those who had lived abroad drank bottled water, as they had when abroad and the quality of tap water was not dependable (CX113) **Perceptions of the water system** There is a mixed understanding amongst vulnerable customers of how water reaches us, how wastewater is taken away, where it goes and how it is processed and treated. Understanding was slightly higher amongst people born in the UK and amongst older people. Some of them could name reservoirs and treatment plants and had an understanding of the water treatment cycle. (CX113) Most did not think about how water reached them, or where it comes from. This was particularly the case with participants with African and South Asian heritage, and more so with those who were born outside of the UK. (CX113) there were also some myths and rumours about the water supplied via taps, such as that it is (treated) sewage water; that it comes direct from the Thames; and about levels of chemicals, toxins and bacteria. Concerns about safety and cleanliness were more prevalent amongst participants of African and South Asian heritage. (CX113) For the most part, however, people had limited interest in what happens to get water to them or to manage wastewater. In addition, only a small number of participants mentioned concerns regarding environmental issues; sewage release into waterways; or water company profits; all of which had been news stories around the time of the research. Slightly more people talked of hosepipe bans, and several talked about burst pipes and leaks; both of which had perhaps had more of a direct impact on them. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

WT1. I want safe, high quality drinking water / Water quality

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Guarantee high quality drinking water (Ranked 1st / 19 Vision 2050 goals tested with customers)*	For nearly all customers, the need for high quality drinking water is a given, and is seen as the ultimate 'hygiene' factor. How customers express this varies; some simply say they expect it as a given, others go further saying that it is essential for a functioning society, free of disease. The very small minority that appear less concerned generally drink bottled water, and there are those that are suspicious of tap water in general. (SP12) Customers were generally positive towards this goal and found the ambition of zero instances of poor water quality admirable, however, many feel that it lacks ambition given the importance of this area of service. A minority of customers acknowledge that they don't understand the technical details of the challenges involved. (SP12) 93% of customers either somewhat or strongly supported Thames Water's proposed plan to meet this goal. Many customers are positive about the use of technology in achieving this goal, as well as forward thinking; some customers suggest working with other organisations on this. Many trust that Thames Water will take the right approach, though a minority feel the plans lack detail. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022
Vision 2050: *Replace all lead pipes (Ranked 8th / 19 Vision 2050 goals tested with customers)*	Many customers are not aware of the issue of lead being harmful to health and are surprised that it is to be found in the water network. Concerns about the impact on health, and in particular the potential danger to the young, are very apparent. There is a clear appetite for Thames Water to address this as a priority. (SP12) The goal of replacing all lead pipes is what customers believe is wholly necessary. Some understand that this will take time, others feel this should be accelerated. (SP12) 94% of customers either somewhat or strongly support Thames Water's proposed plan to meet this goal. A number of customers see this plan as a major undertaking, and some question why local authorities and housebuilders do not also have a role to play within it. (SP12)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

WT1. I want safe, high quality drinking water / Enhancement case / Public health – Reducing risk of lead in drinking water (1/3)

Enhancement Insights

I want safe, high quality drinking water	
Key activities	• Removal of up to 53,000 lead pipe connections (out of ~1.2M connections) by 2030 - targeting the highest risk customers/areas, and a proposal to refund customers who replace lead pipe on their side (in these target areas)
What customers get by 2030	• Up to 53,000 lead pipe connections replaced (TW side only) • A trialled mechanism to help customers replace their lead pipework – the more we do on trials, the fewer lead pipes are replaced during the AMP (£ limited) • An enhanced smarter homes offer to include water quality related advice

Relative priority of enhancement area: 7th/13

Key Sources:
PR24-8 (Deep Dives: Lead Pipes)
PR24-12 PR24 Enhancement Package Options research
SP12 Vision 2050 (Replace lead pipes)

Engagement supporting the need

- Knowledge of lead pipes is low among customers; many are vaguely aware of the health risks associated with lead but are not sure if they should be concerned. They were not clear on how much lead in water is harmful to health and because it is not widely talked about, customers assume the amount of lead in their water supply is inconsequential. Many are not aware if they have lead pipes in their own homes and generally believe it's the homeowner's responsibility to replace them. (PR24-8)
- When told about the amount of lead pipes in our water network (which includes supply pipes that are customers' responsibility), customers are concerned, particularly with the health risk that this could pose to children. (PR24-8, PR24-12) Many customers are surprised this is not in the wider public consciousness, and want to know what water companies are doing to protect customers. (PR24-8)
- Due to the potential health risks, our lead pipe replacement programme is a top priority to address for customers who thought it could be a win-win on an individual and societal level – protecting customer health and replacing the ageing infrastructure (which could reduce leakage), despite some non-household customers being concerned around associated disruptions to supply. Non-household customers in particular feel that replacing lead pipes was a higher priority amongst water service improvement areas compared to household customers. (PR24-12)
- Thames Water's long term goal of replacing all lead pipes is what customers believe is wholly necessary. Some understand that this will take time, others feel this should be accelerated. 94% of customers either somewhat or strongly support Thames Water's proposed plan to meet this goal. A number of customers see this plan as a major undertaking, and some question why local authorities and housebuilders do not also have a role to play within it. (SP12)

Engagement supporting the solutions

- From the PR24 deep dive research on lead pipes, 80%* of customers supported our proposal to replace all Thames Water owned lead pipes 2025 to 2050 (£1.68/year extra on bills) (PR24-8)
- Of the different options tested, there is strong support for Thames Water's initiative to replace 67,000 customer owned supply lead pipes between 2025 to 2030 (86%* of customers) (PR24-8)
- Furthermore, 88%* support Thames Water's initiative to replace 3,000 water fountains in schools. Most customers support Thames Water's initiative to replace all 3,000 water fountains in schools that still have lead pipes between 2025 and 2030 on the basis that it protects those most vulnerable to the negative health consequences of lead pipes. (PR24-8)

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

WT1. I want safe, high quality drinking water /
Enhancement case / Public health – Reducing risk of lead in drinking water (2/3)

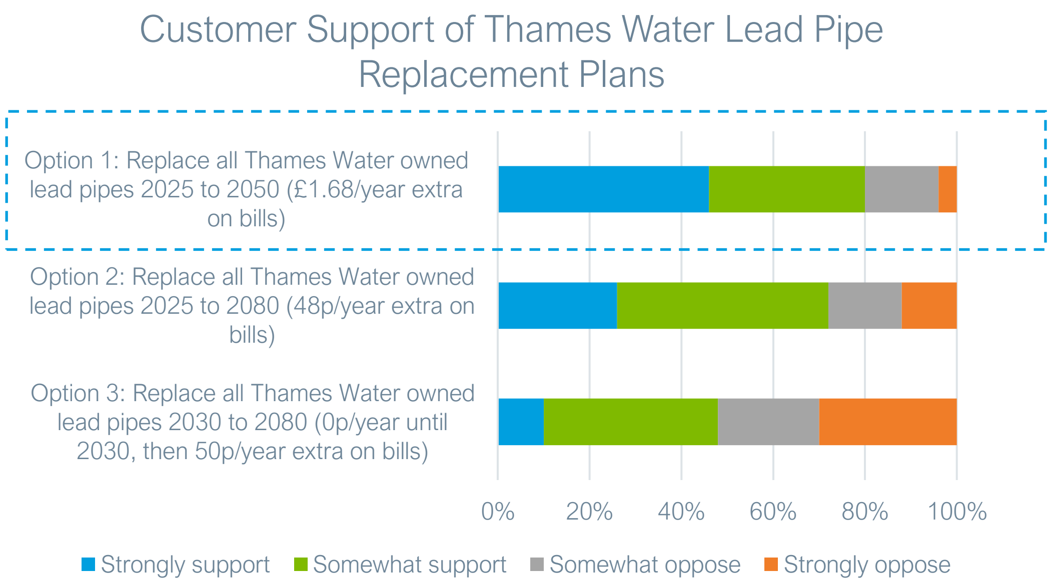
PR24 Deep Dives

Enhancement Insights

The majority of customers want Thames Water to replace all lead pipes by 2050.

Customers expect Thames Water to replace all its lead pipes and do this as quickly as possible with minimal disruption.

Customers would ideally want this to happen by 2050 (80% of customers supported this approach, and when given the choice 66% gave this as their preferred option of three approaches)



*When assessing willingness to pay, customers were made aware of current average annual household bills and were reminded that Thames Water has a range of competing priorities for funding.

PR24-8 Deep Dive: Lead Pipes, February 2022

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

WT1. I want safe, high quality drinking water / Enhancement case / Public health – Reducing risk of lead in drinking water (3/3)

PR24 Deep Dives

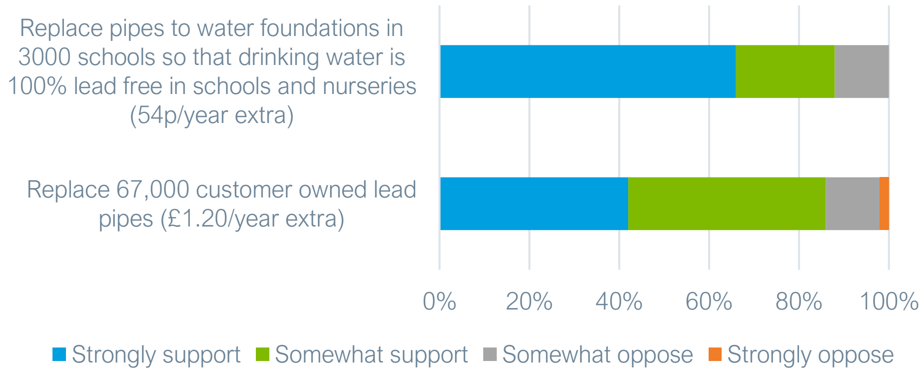
The majority of customers want Thames Water to replace all lead pipes by 2050.

Most customers support Thames Water's initiative to replace all 3,000 water fountains in schools that still have lead pipes between 2025 and 2030 on the basis that it protects those most vulnerable to the negative health consequences of lead pipes.

Many also support Thames Water's plan to replace 67,000 customer lead pipes between 2025 and 2030 but they are polarised on whether this is Thames Water's responsibility.

If no other alternative is available, some feel Thames Water should help customers to replace their lead pipes, but many believe that councils, housebuilders and landlords should bear the responsibility for replacement.

Customer support on proposed plans to replace lead pipes in customer supply pipes and schools



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

PR24-8 Deep Dive: Lead Pipes, February 2022

Enhancement Insights

WT1. I want safe, high quality drinking water /

Enhancement case / Public health - Reducing risk of serious bacteria in drinking water

	I want safe, high quality drinking water
Key activities	• Significant improvements to water treatment processes and technology at one of our Large Processing Plants (e.g. Coppermills WTW), as part of our multi-AMP programme to resolve issues at all relevant WTWs
What customers get by 2030	• We would cover our largest water production site at Ashford Common, reducing the risk of dangerous bacteria for 2.6 million of our 11 million water customers

Relative priority of enhancement area: 2nd/13

Key Sources:
PR24-12 PR24 Enhancement Package Options research
SP12 Vision 2050 (Guarantee high quality drinking water)
R14 (CCW + Ofwat Customer Spotlight Research)

Engagement supporting the need

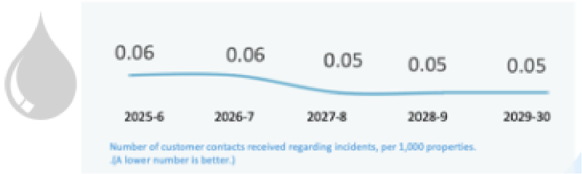
- For water enhancements, safety is a key priority for customers (R14, PR24-12). Hearing that there is a risk of water becoming contaminated by harmful bacteria is alarming to many customers (PR24-12)
- Hearing that there is a risk of water becoming contaminated by harmful bacteria is alarming to many customers (PR24-12) 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 (PR24-12).

Engagement supporting the solutions

- No engagement on the solutions to reduce the risk of serious bacteria in drinking water has been undertaken to test potential solutions with customers.

Performance Commitment – Water Quality

Customers' views on proposed performance commitments were gathered through recent qualitative Acceptability and Affordability Testing (PR24-14)



Actions and benefits	Continue investing, to improve how we treat water and take water from the environment Prevent rainwater and other sources from coming into contact with treated drinking water
Importance	Medium
Current performance	Polarised, subjective and personal view
Headline message	'Best in the world vs. not safe to drink'
Response to Target	OK / about right
Keen to understand / see	Plans to work with filter or softener manufacturers
Divergence across segments	None but splits across segments Non-household have concerns about hard water

Overall response

- Concerns that the current measure doesn't reflect customer experience
- Relies on customers contacting Thames Water e.g. persistent problem, deep dissatisfaction
- Polarised response – water is best in the world vs it's not safe to drink
- Some are buying bottled water, softeners, filters, mixing with squash to avoid issues with taste/smell
- Consensus that limescale content is high, annoying and ruins appliances

Performance against target / other companies

- Company performance against target is okay
- Potential for this to be under reported
- Challenge the measure and targeting process

Response to 2025-2030 target

- Target is basically flat (then improves to 2050) – why?
- Acceptable

Business plan and quantitative considerations

- Clarify that this isn't about safety of drinking – explain about DWI and testing process
- Express measure in more meaningful way e.g. how many properties does Thames Water supply and provide historical context
- Frame within the fact that population/supply is increasing so to maintain current levels is good

Topics

WT2. I want a reliable supply with minimal disruption /

Water supply interruptions

Insight synthesis

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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Water supply interruption	High	The fundamental expectation of service

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Low

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

WT2. I want a reliable supply with minimal disruption /

Water supply interruptions

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights
Maintaining infrastructure	Customers expect us to maintain our network of water pipes and treatment works to ensure it is fit for purpose, providing safe and clean water on demand. They expect us to replace and renew ageing infrastructure, investing in long-term and cost-effective solutions and technology to maintain a reliable service. They call for minimal disruption but recognise and accept that this can happen where we need to carry out work. (SP6, CX45) Future bill payers and business customers both appreciate a constant supply of consistently clean water as a fundamental service and expect this to continue without interruption or contamination. (PR24-11) Stakeholders see Thames Water as reliable in providing the vital service of water and most stakeholders acknowledge that 99% of the time water provision and waste management works well and is out of sight and out of mind. They recognise that is a feat considering everything involved. Despite the consistently negative news coverage, stakeholders know that Thames Water is doing well most of the time and will only make the news when something goes wrong (S14)
Supply interruptions	Over 90% of customers are satisfied with the reliability of their water supply. (CX110) Most customers see issues around supply reliability as an inconvenience, rather than a severe risk, and is seen as less important to address than areas with risks to safety e.g. lead pipes and bacteria in water (PR24-12) When things go wrong, the factors that customers are generally most concerned about are the severity, frequency and duration of any service problem. Customers are prepared to tolerate a service problem when it is not too severe, is relatively infrequent or does not last too long. Customers consistently characterise a problem as being unacceptable when it is severe, happens too often or goes on for too long. Customers want outages to be less than 2 days and they find it unacceptable when an outage is more than 2 days, with over 10 days seen as completely unacceptable. (SP5, SP6) Companies need to consider how to map where problems with water pressure and supply interruptions are occurring, so that they can be proactive in identifying problems before customers are driven to making complaints (CX110) Women and those who have experienced outages before are particularly less tolerable towards supply interruptions. (SP6) Those living in North-east London and the Lee Valley are the most intolerable to outages. (SP6) Duration of interruptions is important across all customer types, but it is the main driver for more vulnerable people, those with larger families and dependents or businesses for whom water is integral, as well as those who have experienced supply issues in the past. (SP6, PR24-12)

Key Sources

Insight Sources v18:
CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023

Insight Sources v17:
PR24-12 PR24 Enhancement Package Options research , September 2022

Insight Sources pre-v17:
S14 Stakeholder Reputation Research, March 2022
PR24-11 PR24 Foundational Research: What is important to future bill payers and Business Customers, May 2022
CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020
SP5 Water Supply System Resilience Programme – Customer Research (Qualitative findings), December 2020
SP6 Water Supply System Resilience Programme – Customer Research (Quantitative findings), January 2021

Insight triangulation key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Low

WT2. I want a reliable supply with minimal disruption / Water supply interruptions

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Experience of vulnerable customers with supply interruptions	Experiences of issues with water supply were fairly common in this research. Several participants had experienced outages in the last few years, some talked of problems with water pressure, and a minority had had problems with the quality of their water (e.g. 'muddy' water). (CX113) A few customers felt that these issues hadn't caused much of an issue (although it had been stressful at the time). For most, the issues were short-lived and they had found ways around them. However, some participants found it more difficult and stressful, particularly disabled people, and those with large families and young children. (CX113) Where participants had experienced disruption to their water supply, most had checked if neighbours had similar issues, went to their local supermarket to stock up on bottled water, and waited for the supply to come back on. (CX113) A minority of participants recalled having received notifications of planned works (either by letter or text), but most said disruptions were unexpected. (CX113) Some (especially younger and digitally confident participants) had checked their neighbourhood social media feeds or Thames Water's website directly. Few had called Thames Water directly, as they had assumed the disruption would not last long. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Low

WT2. I want a reliable supply with minimal disruption /

Water supply interruptions

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Low pressure	A good flow of water is seen as a core part of Thames Water's service and most customers are satisfied with their water pressure. Even those who are affected by low pressure can be forgiving as incidents are not that frequent or, if it is an ongoing low-level issue, it is not necessarily seen as a Thames Water problem (see 'Responsibilities') (PR24-2) Customer satisfaction with the pressure of the water they receive has increased over in 2022 (86%). (CX110) Chronic low pressure is seen as inconvenient and annoying. Those who experience ongoing low pressure say it means that routine activities may take longer, and some may change their behaviour such as taking fewer baths. There can be a lack of clarity over whether it is a supply issue or due to internal plumbing. Those who experienced a one-off incident find they are uncertain how long it will last and are unable to go about their daily routine. (PR19-53) Customers want the service to be maintained but don't suggest significant improvements are needed. Few support paying more to reduce incidents of low pressure because the service is generally seen as acceptable as it is. (PR19-18) When compared with other water service problems, low pressure for a limited period of time is generally considered less of an inconvenience than a supply interruption of 4 to 8 hours, for example. However, if water pressure is low all the time, this is seen as relatively worse than a supply interruption of that length. (PR19-18) Water pressure is not solely seen as a Thames Water responsibility. For example, in the case of high-rise buildings, maintaining high water pressure is seen by customers, at least in part, as the responsibility of the property developer or landlord. (PR19-53)	Insight Sources v18: CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 Insight Sources pre-v17: SP12 Vision 2050 Research. May 2022 PR24-2 PR24 Foundational Research - Customer Voices (Nov 21) Pre-2020 Insight Sources: PR19-18 CR43e Stage 2 Customer Preferences Research – Water Services, May 2017 PR19-53 CR26f Deep Dives, Water Pressure, September 2016
Vision 2050: *Provide a more reliable supply of water (Ranked 6th / 19 Vision 2050 goals tested with customers)*	Customers are clear that a reliable supply of water is important. At the same time, many feel it is lower down the list of priorities for them as they either have never experienced such problems themselves or they do not see Thames Water's current performance (22 minutes of outage) as especially poor. (SP12) Customers provided mixed reactions to this goal ('*Provide a more reliable supply of water*'); some see it as reasonable given current performance, whereas others want to see progress accelerated. (SP12) 94% of customers either somewhat or strongly support this goal. Timescales aside, customers are largely very positive about the plan, particularly towards the use of technology in reaching the goal. (SP12)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Low

WT1. I want safe, high quality drinking water / Enhancement case / SEMD (Security & Emergency Measures Direction)

Enhancement Insights

I want a reliable supply with minimal disruption	
Key activities	• Providing alternative water supplies (e.g. bottled water) for 1.5% of the population in our supply area for 48 hours • Security improvements at 37 Critical National Infrastructure locations
What customers get by 2030	• Improved alternative supply capability up from 0.5% of the population in AMP7 to 1.5% by 2030 • Ensuring critical infrastructure is protected

Relative priority of enhancement area: 9th/13

Key Sources:
SP19 WRSE Best Value Criteria
PR19-19 CR52 Resilience Deep Dive
S8 PR19 Summary of Stakeholder Engagement
PR24-15 PR24 Enhancement Case Deep Dive Research

Engagement supporting the need

- Customers had not previously given much consideration to what an emergency situation or event might be, however, once informed customers are concerned about their access to water and ability to carry out essential day-to-day activities, particularly with a limited supply. (PR24-15)
- Customers agree that Thames Water have a responsibility to provide customers with water if supplies are disrupted, and feel it is important that emergency measures are in place to secure access to water resources – this is particularly important and a top priority to future bill payers. (PR24-15)
- Customers are surprised that Thames Water are legally obligated to provide supplies to only 1.5% of customers and are interested to know how Thames Water will ensure all customers are protected and have access to alternative water sources. (PR24-15)
- Business customers who are heavily reliant on water want to know how their needs will be prioritised and the longer-term impacts of an emergency situation. (PR24-15)
- Customers acknowledge that population growth and climate change will continue to exacerbate this issue and so there is concern that if no action is taken this could leave many without water. (PR24-15)
- 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 place a high priority on us ensuring the long-term security of supply in the region, both for public supply purposes and other sectors. (SP19)
- Customers expect us to plan for future hazards including weather related events, terrorism and cyber-crime. They expect us to plan for a service that is resilient to these hazards and trust in our expertise to do this. (PR19-19)
- Stakeholders encourage Thames Water to ensure that their plans can cope with a range of conditions/scenarios, such as flooding and freeze-thaw. Stakeholders want to see Thames Water tackling climate change in our next business plan. (S8)

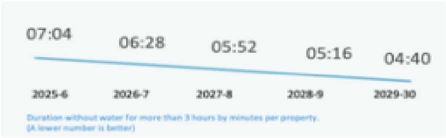
Engagement supporting the solutions

- **The vast majority of customers support Thames Water's plans** for alternative water in an emergency, perceiving access to water as imperative and feeling reassured that measures have been put in place. Some customers expressed concern, however, over the potential plastic waste associated with stocks of bottled water and questioned how supplies would be distributed to ensure equal access (this applies to all options). (PR24-15)
- **'More tankers (11 to 50) to pump water directly to taps'** was the most preferred investment option for all customer groups. This is driven primarily by the convenience and reduced disruption associated with this option for all customers groups, compared with '**providing bottled water for people to collect'** and '**more tankers (11 to 50) for people to collect water from**'. It is also cheaper than providing bottled water and provides more flexibility to customers. (PR24-15)

*n.b. there is slight bias in the way the proposed options were presented to customers in PR24-15 in that the option for bottled water stations listed more negatives than the water truck options

Performance Commitment – Supply Interruptions

Customers' views on proposed performance commitments were gathered through recent qualitative Acceptability and Affordability Testing (PR24-14)



Actions and benefits	Better manage pumps, valves and water pressure to reduce strain across the network Have more staff and equipment to fix problems
Importance	Medium
Current performance	Acceptable
Headline message	'Not happened to me – surely people can cope'
Response to Target	OK / about right
Keen to understand / see	Long-term pipework replacement Policy for those on PSR
Divergence across segments	Concerns higher for vulnerable and non-household customers

Overall response

- Limited experience of unplanned interruptions
- Generally felt to be important esp. for those in priority groups (new mums, elderly, water dependent) and non-household who are water dependent (lost time is money)
- Linked to leakage and overall pipework
- Proactive communication during an unplanned interruption is key

Performance against target / other companies

- Company performance is okay
- Only just over the industry target
- Difficult measure to understand fully

Response to 2025-2030 target

- Target is going in the right direction
- Prefer to see number of properties over 3 hours coming down
- Want to see more than just 'boots on the ground'

Business plan and quantitative considerations

- Measure is very difficult to understand and worth thinking about in the quantitative work
- Want to know % of properties affected and historical context
- Potential to talk about communications, PSR policy, strategic pipework replacement, new materials that respond well to heat/freezes – these things matter to people

Topics

WT2. I want a reliable supply with minimal disruption / Water network resilience

Insight synthesis

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.

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

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

Stakeholder views | Detailed Insights | Segmented Insights

WT2. I want a reliable supply with minimal disruption / Water network resilience

Sub-topic	Detailed Insights	Key Sources
Mains repairs	When presented with information surrounding the current state of trunk mains and distribution pipes and the current approach to repairs, customers believe considerable improvements are needed and are overwhelmingly in support of more proactive replacement. Many express shock or concern this isn't the current approach. (PR24-10) Customers are concerned about the condition of distribution pipes and the potentially catastrophic impact of a trunk main bursts (PR24-10) Both the Greater London Authority (GLA) and non-profit organisation London First were supportive of a proactive mains replacement programme and believe this aligns with their objectives, but want to see more on how Thames Water is mitigating traffic disruption. (S11, S12) While acknowledging disruption is unavoidable, the GLA wants to see Thames Water better show what it is doing to minimise disruption and explore the potential role of innovation within this. (S9, S11) The GLA and London First also highlighted the opportunity for collaborative opportunities to minimise disruption, for example the electrification of London roads. (S11, S12) Customers have mixed views towards 'replacing trunk mains' as a priority enhancement area; for some, 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. (PR24-12) Recent trunk mains bursts in London has triggered a huge amount of stakeholder interest, especially in the vicinity of the burst. They were kept updated throughout the incident but now want details on investment in the area. (S38)	Insight Sources v18: S38 Elected representative issues tracker Q1 23. March 2023 Insight Sources v17: PR24-12 PR24 Enhancement Package Options research , September 2022 Insight Sources pre-v17: PR24-10 Deep Dive: Trunk Mains and Replumb London, February 2022 S9 Research Summary Form – PR24 GLA Sessions, March 2022 S11 GLA PR24 Feedback Form (Water), March 2022 S12 Research Summary Form – PR24 London First Sessions, March 2022

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

Stakeholder views | Detailed Insights

WT2. I want a reliable supply with minimal disruption / Water network resilience

Sub-topic	Detailed Insights	Key Sources
Investing for the future	Customers tell us that they expect infrastructure and 24/7 service to be maintained and call for a resilient water supply into the future. They expect Thames Water to be able to deal with hazards – they are more concerned with impacts on their water and wastewater service rather than the cause of the problem. They call for investment in long-term and cost-effective solutions that meet future challenges. (PR24-1) Customers of all ages show concern for the future of younger generations. They say we all use water, and benefit from past investment, and so should expect to do the same for future generations. (PR19-4) Customers are generally supportive of major infrastructure projects where they can be shown to deliver solid improvements and benefits for the future, for example they are supportive of the Thames Tideway Tunnel when the reasons for it are explained. (PR19-59) Similarly, customers are supportive of resilience plans in North-East London, an area of higher risk. Most felt that the risk of losing water supply was completely unacceptable and wanted investment to avoid this happening. (PR19-62) 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 (S8) Stakeholders deem the country's water infrastructure not fit-for-purpose for a growing population, especially in London, and there is demand that the system is proactively invested in rather than applying patchwork fixes retroactively. (S39)	Insight Sources v18: S39 Stakeholder Reputation Research Report. March 2023 Insight Sources pre-v17: PR24-1 PR24 Foundational Research - An analysis of customer views and expectation of Thames Water Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019 PR19-4 CR19 Intergenerational fairness, October 2016 PR19-59 CR03 TTT customer understanding, Populus 2018 PR19-62 CR67 NE London Resilience, eftec/ICS, January 2019

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

WT2. I want a reliable supply with minimal disruption / Enhancement case / Improving water supply resilience

Enhancement Insights

I want a reliable supply with minimal disruption	
Key activities	• Delivery of 17 capital schemes to mitigate 23 of our largest resilience risks to supply in London and Thames Valley
What customers get by 2030	• Protection from unacceptable interruptions to supply for 4.4 million customers (334,845 vulnerable) from 80 days annualised interruption a year • An avoidance of £285 million Gross Value Added lost to London's economy

Relative priority of enhancement area: 5th/13

Key Sources:
PR24-12 PR24 Enhancement Package Research
SP5 Water Supply System Resilience Programme – Customer Research (Qualitative findings)
SP6 Water Supply System Resilience Programme – Customer Research (Quantitative findings)
SP12 Vision 2050 (Ensure there is enough water for customers without taking too much from rivers and harming the environment)
PR24-15 PR24 Enhancement Case Deep Dive Research
PR24-14 Acceptability and Affordability (Qualitative findings)

Engagement supporting the need

- All customers generally see a reliable source of clean water as a fundamental job of Thames Water and many think they would not be able to perform many basic daily tasks in the event of a major supply interruption. (PR24-15)
- At least 90% of household and non-household customers view this issue as important to address, with 8 in 10 future bill payers agreeing. Customers aged 65+ are significantly more likely to view improvements to reduce major supply interruptions as very important. Customers believe the high risk of a major supply interruption is due to ageing infrastructure which needs to be replaced. (PR24-15, PR24-12, PR24-1)
- The examples of Honor Oak and Earley were interpreted by customers as evidence that Thames Water has not been proactive enough in dealing with this issue. However, customer are reassured that Thames Water have identified major sites like this and have imminent solutions to mitigate the risks (PR24-15)
- A reliable supply of water is a higher priority for vulnerable customers and non-household customers – interruptions lasting more than two days generally pose bigger challenges to them (PR24-14)
- Customers consistently characterise a problem as being unacceptable when it is severe, happens too often or goes on for too long. Customers want supply interruptions to be less than 2 days and they find it unacceptable when an outage is more than 2 days, with over 10 days seen as completely unacceptable. (SP5, SP6, PR24-15, PR24-14)
- The objective to protect up to 2.3 million properties from an unacceptable interruption of longer than 2 days once in a lifetime by 2030 is seen as ambitious and supported by customers. 86% preferred a package where Thames Water protects 1m properties from an interruption of 2+ days (PR24-12)

Engagement supporting the solutions

- **Almost all customers support Thames Water's approach** to major water supply interruptions as they feel Thames is being proactive in mitigating the threat and also that the work is inevitable and costs would only further increased if left unaddressed. **'Reduced risk of water supply interruptions with quicker improvement to 2030 then evenly spread investment to 2050'** was the preferred option for all customer groups, who were uncomfortable with the amount of water at risk already and want to see major risks reduced by 2030. Despite this, some raised concerns around the anticipated disruption as well as the lower return on investment from this approach compared with more evenly spread investment. (PR24-15)
- With more evenly paced investment between 2030 and 2050, customer feel most urgent threats will have been addressed and disruption is minimised during this period. Future bill payers want quicker improvements to 2030 as they are aware they will otherwise inherit the issue. (PR24-15)
- 1 in 3 customers preferred **'evenly spread investment to 2050'** due to the comparatively smaller bill impacts and disruption, as well as a higher return on investment. However, some were concerned this may not address large current risks to supply and may long-term end up being more costly. (PR24-15)
- Fewer than 1 in 10 support **'no additional investment'** as most believe that Thames Water have a fundamental duty to ensure customers have a reliable supply of clean water and feel it is unacceptable to put that at risk. Some in support of this option felt it would mean less financial pressure on households who are already struggling with their bills. The view of most of those in support of this option was that funding shouldn't come from increasing customers' bills i.e. government funding or from Thames Water's profits instead. (PR24-15)
- Customers support Thames Water's plan to develop a more secure network by 2050, however, expect the most serious threats to be prioritised due to the anticipated disruption associated with the required works. (PR24-15)
- Reactions to the Honor Oak and North Leigh Reservoir case studies reveal that customers prefer f low-cost options which immediately reduce the risk of supply interruptions. However, in the pursuit of 'cost-effectiveness', they want reassurance that Thames Water are considering the long-term integrity of the network rather than relying on short-term fixes which don't address the underlying cause of this issue. (PR24-15)
- There is medium support for this enhancement case (reliable supply). Customers are comfortable with the cost, however, feel that only protecting 53,000 homes lacks ambition. However, they point out that most problems tend to be fixed within a couple of hours. (PR24-14)
- Increasing the number of properties protected from an interruption of more than 2 days ('Improving water supply reliability') had a smaller impact on customer preference for an enhancement package than other water enhancements. The highest improvement for this enhancement was for the protection of 2.3m properties, however, the most preferred package contained a scenario where 1 million homes were protected from an interruption lasting more than 2 days. (PR24-12)

WT2. I want a reliable supply with minimal disruption / Enhancement case / Reducing risk of basements flooding from trunk mains (1/3)

Enhancement Insights

I want a reliable supply with minimal disruption	
Key activities	• Rehabilitation of around 50km of our highest risk trunk mains, plus completion of the projects in the London conditional allowance
What customers get by 2030	• Protection of 3,000 high risk basement properties out of a total of 60,000 properties (5% risk reduction)

Relative priority of enhancement area: 12th/13

Key Sources:
PR24-10 (Deep Dives: Trunk Mains and Replumb London)
PR24-12 PR24 Enhancement Package Research
SP12 Vision 2050 (Reduce leakage to below 10%)
PR24-15 PR24 Enhancement Case Deep Dive Research
PR24-14 Acceptability and Affordability Testing (Qualitative findings)

Engagement supporting the need

- Most customers are generally not concerned about basement flooding, however, they are surprised about the current risk and believe Thames Water have an ethical obligation to protect customers who may be impacted. Most customers want to avert basement flooding due to a perception that the disruption caused by repairing trunk mains will only get worse if left unaddressed. Household and non-household customers see this issue as significantly more important to address compared with future bill payers (PR24-15)
- Customers are concerned about the condition of distribution pipes and the potentially catastrophic impact of a trunk main bursts. When compared to other enhancement case areas tested, customers see replacing trunk mains as the top priority, closely followed by the replacement of distribution mains. (PR24-10)
- Replacing trunk mains is a very high enhancement priority for customers in London but lower for those in other regions. The PR24 enhancement options package research found that customers overall are favourable of this enhancement. However, the strength of this favourability is mixed depending on the customer location(i.e. London vs non-London) and whether the customer prioritises individual or societal benefits. For some, 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'). Others feel resolving this could have long-term societal benefits in terms of reducing wastage and future-proofing Thames' systems. London customers where particularly enthusiastic about this enhancement, reflecting level of risk in London compared to other towns and cities in the UK. (PR24-12)
- A core component of our corporate strategy is that the health and safety our community and our employees should be protected through all reasonable measures. Our engagement with customers and stakeholders shows that they strongly support this position. Our customers expect us to maintain our network of water pipes and treatment works to ensure it is fit for purpose, providing safe and clean water on demand. They also expect us to replace and renew ageing infrastructure, investing in long-term and cost-effective solutions and technology to maintain a reliable service. Our customers' unanimously support proactive replacement of both trunk mains and distribution pipe and are supportive of a movement towards a programme of regular, proactive renewal of our water network. (PR24-13)

Engagement supporting the solutions

- **The vast majority of customers support Thames Water's plan** to reduce the risk of basement flooding as this will proactively and directly address the issue and minimise disruption in the long-term. However, customers want to know how more about costs and how much disruption will occur in the medium and long-term. (PR24-15)
- For this reason primarily, **'Reduce the risk of flooding by replacing trunk mains'** was the preferred investment of all customer groups. Future bill payers in particular favoured this approach as they recognised they would otherwise inherit this issue. (PR24-15)
- Those who preferred **'lining trunk mains'** felt this was an easier, short-term solution, however, some want to know how frequently slip lined trunk mains would need to be replaced and want reassurance that Thames Water are factoring in the extra strain/ potential delays due to climate change and a growing population and that this approach isn't just deferring costs into the future. (PR24-15)
- Customers reacted positively to the proactive replacement of pipes, however, the perception of this enhancement from customers more generally was that this issue was 'London-focussed' and only likely to benefit customers who they perceived to be wealthier (i.e. living in London in a property with a basement) than them. Therefore, despite the relatively low impact on their bills, many felt the money could be better spent elsewhere. (PR24-14)
- In the PR24 deep dive on the Trunk Mains enhancement case (PR24-10), customers told us they favour a 'prevention rather than cure' approach, however they expect better monitoring to keep costs and disruption to a minimum throughout any programme of work.
- Customers strongly support a change of approach to regular and proactive renewal (74% favoured a high increase in activity*), starting with pipes most at risk. (PR24-10)
- They are broadly split on whether to prioritise trunk mains, distribution pipes or both equally: customers favour prioritising trunk mains because this avoids catastrophic impacts, such as destruction of properties, and may have greater impact on leakage overall. However, prioritising distribution pipes feels like it will deliver a greater overall impact for customers as well as being cheaper and easier. (PR24-10)

*n.b. 1) the percentages shown on this page are based on a relatively small qualitative sample size, they are shown to indicate direction of sentiment only; and 2) there is slight bias in the way the proposed options were presented to customers in PR24-10 in that the proposal to change the approach of mains replacement and distribution pipe replacement listed more positives than negatives.

WT2. I want a reliable supply with minimal disruption / Enhancement Case: Replacing Trunk Mains / Replumb London (2/3)

PR24 Deep Dives

Adopt a more proactive replacement approach for both trunk mains and distribution pipes, beginning with those most at risk

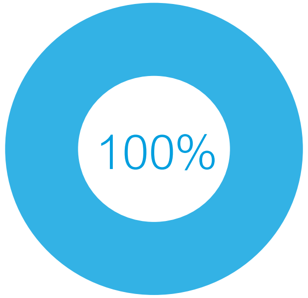
Customers favour a 'prevention rather than cure' approach, however better monitoring is required to keep costs and disruption to a minimum throughout any programme of work.

Customers strongly support a change of approach to regular and proactive renewal, starting with pipes most at risk.

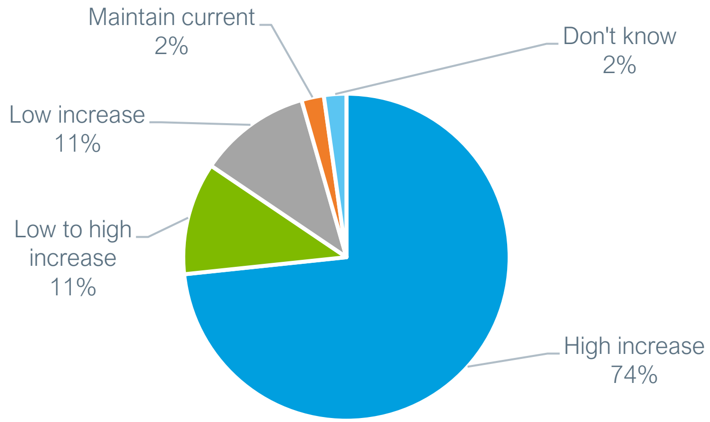
Customers were broadly split on whether to prioritise trunk mains, distribution pipes or both equally:

- Customers favour prioritising trunk mains because this avoids catastrophic impacts, such as destruction of properties, and may have greater impact on leakage overall.
- However, prioritising distribution pipes feels like it will deliver a greater overall impact for customers as well as being cheaper and easier.

Support for a change in approach to more proactive distribution main replacement



Preferred size of increase in proactive replacement of distribution pipes



*n.b. 1) the percentages shown on this page are based on a relatively small qualitative sample size, they are shown to indicate direction of sentiment only; and 2) there is slight bias in the way the proposed options were presented to customers in PR24-10 in that the proposal to change the approach of mains replacement and distribution pipe replacement listed more positives than negatives.

PR24-10 Deep Dive: Trunk Mains and Replumb London, February 2022

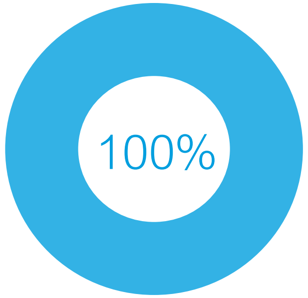
WT2. I want a reliable supply with minimal disruption / Enhancement Case: Replacing Trunk Mains / Replumb London (3/3)

PR24 Deep Dives

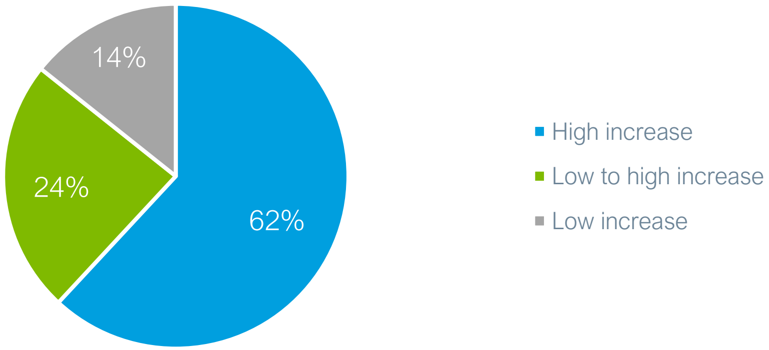
Enhancement Insights

Customer Prioritisation

Support for a change in approach to more proactive trunk main replacement



Preferred size of increase in proactive trunk main replacement



There is unanimous support for proactive replacement of both trunk mains and distribution pipes and customers were broadly split on whether to prioritise trunk mains, distribution pipes or both equally.

- Some customers are cautious about their support, and want to have a better understanding of the impact on their bills
- Customers believe those less well-off need to be protected from any sharp bill increases

Despite this, customers feel confused by why Thames Water making customers pay with an increase in bills if these initiatives will deliver savings in the long-term. Customers require more information on upfront and future costs, breakdown of costs and where money from increased bills will be used, provision of timeline and map of works.

When compared to other enhancement case areas tested, customers see replacing trunk mains as the top priority, closely followed by the replacement of distribution mains.

*n.b. 1) the percentages shown on this page are based on a relatively small qualitative sample size, they are shown to indicate direction of sentiment only; and 2) there is slight bias in the way the proposed options were presented to customers in PR24-10 in that the proposal to change the approach of mains replacement and distribution pipe replacement listed more positives than negatives.

Topics

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Insight synthesis

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. When the reasons for the Thames Tideway Tunnel are explained to customers there is a much higher level of support than opposition for the project.

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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
External sewer flooding	High	Important because of unpleasant impact
Storm overflows	Lower	Less important as customers do not perceive they experience them directly and do not equate with sewer flooding prevention around property.

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Key evidence sources*

PR24 foundational research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 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.

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Maintaining and upgrading existing wastewater infrastructure (1/2)	The options most preferred by customers for managing the wastewater sewer system efficiently are 'Increasing the capacity of the existing wastewater sewer system' (36% chose this option as their top priority), and 'Building new wastewater sewers and tunnels to connect different areas' (34%). (SP8) The least preferred options are 'Relining existing sewers' and 'Providing vulnerable properties flood protection measures', with 50% of customers placing this as the least prioritised option. (SP8) The most preferred options for 'managing wastewater treatment efficiently' amongst customers are 'Using advanced technology to improve existing wastewater treatment works' (45% chose this as their top priority), and 'Expanding existing wastewater treatment works' (24%). (SP8). The least preferred options are 'Treating wastewater in the wastewater sewer pipes' (38%) and 'Catchment management' (21%). (SP8) Awareness (real and latent) of storm overflows and river pollution is high but actual understanding is extremely low. However, consumers are unlikely to ever engage fully on the detail of storm overflows and river pollution so the focus should be upon a single, simple, message which challenges the narrative around storm overflows. (R41) Customer views on our sewerage service has been on a slow decline over the past few years with fewer than two thirds of customers satisfied with the sewerage services in Q1 23-24. (CX120) However, customer satisfaction with maintenance of sewerage pipes and treatment works has increased significantly through 2022, now with over 7 in 10 customers satisfied (up from 6 in 10). (CX110) Wastewater-only customers place importance on effective sewage management and are concerned around the lack of issue management and lack of control - ineffective sewage management which results in internal (toilet blocking) and external (raw sewage in rivers) issues (although acknowledged to not occur commonly) can have severe detrimental impacts to Thames Water's reputation due to poor experience and disruption to customers' piece of mind. (CX65) More than three quarters of customers (76%) say we should do more to maintain the sewerage network and reduce blockages and sewer flooding. Customers expect reliability even in the face of new challenges (e.g. more intense rainfall) that might put pressure on the system. (PR19-38). Stakeholders acknowledge that 99% of the time waste management works well and is out of sight and out of mind. They recognise that is a feat considering everything involved. Despite the consistently negative news coverage, stakeholders know that Thames Water is doing well most of the time and will only make the news when something goes wrong. However, the prime concern across stakeholder groups is frequency of damaging water events, mainly sewage spills and flooding. Although many recognise the industry responds quickly to fix immediate problems there is worry that these reactive actions are simply not enough (S14)	Insight Sources v18: CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 CX120 C-MeX CES and Brand Survey Q1 23-24, August 2023 Insight Sources v17: R41 Bridging the gap: Awareness and Understanding of Water Issues, November 2022 Insight Sources pre-v17: CX65 Affinity Water – Water Community Insights Summary: Sewage, May 2022 S14 Stakeholder Reputation Research, March 2022 SP8 DWMP - Customer Research: Part 2 Qualitative Research: Final Report, October 2021 Sources pre-2020 PR19-38 CX36 Rant & Rave Customer Insight Pack, Thames Water (Jan 2017)

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Wastewater network resilience

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Maintaining and upgrading existing wastewater infrastructure (2/2)	Both household and non-household respondents place a high priority on maintaining the asset health of our waste system (keeping sewers and pipes in good working condition). This is viewed a top priority, closely followed by avoiding pollution incidents (consistent with the potential severity of impact on rivers and wildlife). (SP9) Mid-tier priorities are to reduce flooding risks and address wider environmental quality issues, including storm overflows. (SP9) Lower priorities are activities that customers see as “business as usual” across all of Thames Water’s service areas, rather than exclusive to the DWMP (net zero carbon and collaborative working). (SP9) As expected, cost was also a top-level consideration for both household and non-household respondents, indicating the need to balance the pace of investment and the impact on customer bills. (SP9) In the case of non-compliance in the sewage treatment process, customers would like to see additional investment to improve sewage treatment facilities more rapidly than we are currently to reduce inefficiencies of non-compliance. Customers would also like to see investment in improving rivers affected by non-compliant behaviour and money returned to them in a form of bill reduction. (SP10) Most customers want greater transparency from Thames Water as to how much damage is being done by this non-compliance issue and what is being done to prevent it happening in the future. They believe that Thames Water is not currently doing enough to rectify this issue, and that its current response is too slow. A minority are sympathetic to the situation Thames Water is in and think on this occasion, they should not be fined but should work with Ofwat to resolve the issue. (SP10) Overall, irrespective of action taken, the intention of customers is almost unilateral in that they want Thames Water to be compliant as soon as possible. (SP10)	**Insight Sources pre-v17:** SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021 SP10 Non-compliance in Sewage Treatment Works: Findings from qualitative research with customers, December 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Stakeholder views | Detailed Insights

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Sub-topic	Detailed Insights	Key Sources
Customer attitudes towards increasing use and prioritisation of 'new' wastewater solutions (1/3)	When shown options for wastewater solutions, none were either universally supported or rejected by customers. The strongest support was shown for options that they considered to be realistic to implement and already proven to work. Customers preferred options they considered were sensible and the 'right thing to do' such as managing rainwater (green infrastructure). (SP8) Green solutions in terms of managing rainwater, either through green infrastructure, or collection and reuse systems garner strong support. Some concerns were flagged about the practicalities of implementing rainwater collection and reuse schemes. (SP8) Most customers are unaware of the different options for sewer flooding and their largest considerations are risk and cost rather than the type of schemes that are put in place. They marginally prefer the option to create wetlands over and above increasing the size of sewers (1.6x) because of the benefits of habitat creation. But how the problem is dealt with is of lower concern and most say solutions should be driven by reducing the number of properties where internal flooding is prevented. (PR19-9) While in line with participants' strong support for green solutions, views on catchment management were mixed and tempered by a hesitancy that relying on others to deliver solutions may be of limited success. (SP8) Stakeholders also support the extension of investment in green infrastructure and sustainable drainage to reduce flooding and provide biodiversity, recreation and water quality benefits. (S8) High levels of support across the board were observed for the use of new solutions in the DWMP. Around 7 in 10 respondents (household and non-household) in both London and the Thames Valley supported target for significantly increasing use of SUDS and other actions to "replumb" the wastewater system. (SP16) At a national level people think we should be aspiring for world leading infrastructure or solid improvements but, feel that infrastructure happens 'to them' not 'for them'. They trust the industry to make the right decisions but want to understand what it is doing and why it is doing it. They want to discuss major infrastructure needs in their area and want to be involved in a two-way conversation and to help them understand the benefits. (SP8, PR24-3) How we are maintaining infrastructure now is a key indicator of the confidence that customers have in how we can cope with future challenges. (SP8)	Insight Sources v17: SP16 DWMP Customer Consultation, September 2022 Insight Sources pre-v17: PR24-3 PR24 Foundational Research – Social Media Analysis, November 2021 SP8 DWMP - Customer Research: Part 2 Qualitative Research: Final Report, October 2021 Pre-2020 Insight Sources S8 PR19 Summary of Stakeholder Engagement, April 2019 PR19-9 CR26d Deep Dives, sewer flooding and blockages, BritainThinks, October 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Customer attitudes towards increasing use and prioritisation of 'new' wastewater solutions (2/3)	Customers supported the bigger 'new infrastructure' options such as separating systems, constructing connecting tunnels and sewers and expanding or building new wastewater treatment works. The only concerns highlighted are impact on bill level and impact on environment and green spaces. (SP8) Customers have mixed views on catchment management, with some customers supporting a natural solution approach whilst others were concerned about the effectiveness of relying on other parties. (SP8) Customer support was more limited for options that they considered did not solve the underlying problem (flood mitigation for vulnerable properties and re-lining sewers) or options that they considered to be unproven and higher risk (real-time control in sewers, in-sewer treatment), or unrealistic to implement (alternative pathways for rainwater). (SP8) Participants were also less accepting of options that they considered to be unproven and higher risk, or unrealistic to implement. These options were considered by customers to have an unproven track record and higher perceived risk attached, for instance treat in pipe, use of real time control in sewer, or appeared unrealistic to implement, particularly in the urban environment. (SP8) Customers said that there are already effects of climate change, therefore, there should be investment in better infrastructure to cope with severe rain fall which leads to the system suffering an overload. (SP8) Customers support the methods proposed by Thames Water to reduce sewer flooding between now and 2030 and the outcome of having reduced sewer flooding of 50%. Generally, customers see the benefits of both green (natural solutions) and grey solutions (artificial constructions) and believe a mix of both is best. (PR24-9) Stakeholders in community groups impacted by capital delivery and major projects want Thames Water to ensure a constant and safe supply of water and wastewater services today and in the future by firstly operating the existing assets effectively and efficiently, ensuring assets work as they are intended, and then where required investing in new assets and processes to ensure services can continue to be delivered. (S20) Majority (>60%) of customers and stakeholders agree with preferred Drainage & Waste Management Plan, which includes nature based solutions and use of latest technology to increase sewer system capacity. Stakeholders that were not supportive of the plan, felt that Thames Water should review the balance between the different plans put forward, and that more immediate action is required with regards to when solutions are delivered. (SP20) Regulators wanted greater clarity around how Sustainable Drainage Systems (SuDS) are being valued, to better demonstrate what is best value. The Environment Agency said, "the plan should contain more detail within options appraisal regarding the assumptions employed that underpin the justification for the scale of the SuDS options." (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You said we did. February 2023 Insight Sources pre-v17: S20 Research Summary Form – Communities impacted by Capital Delivery, June 2022 PR24-9 Deep Dive: Waste system headroom, February 2022 SP8 DWMP - Customer Research: Part 2 Qualitative Research: Final Report, October 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Customer attitudes towards increasing use and prioritisation of 'new' wastewater solutions (3/3)	Stakeholders and regulators provided feedback as to how the options appraisal process could be adapted: • Prioritising catchment wide and nature-based solutions over traditional engineering approaches. • Prioritisation should include sensitive areas of groundwater alongside rivers and wetlands. (SP20) Stakeholders and regulator comment on the SuDS plan (SP20): The DWMP includes a marked step change in the delivery of SuDS compared to our previous level of SuDS delivery. The plan could include more detail on how this change will be achieved and how the number of opportunities required to meet the DWMP targets will be identified. There is insufficient information to give confidence that the scale of roll out adopted within the preferred plan approach will be achievable and the impact it may have on the delivery of the DWMP goals if it is not. Some stakeholders suggested loading the plan more evenly to achieve more SuDS in earlier years of the plan. There is concern around land availability in London where SuDS have been prioritised as a strategy for mitigating pressure on the sewers. Challenges regarding the ownership and maintenance of SuDS were flagged by many as a potential issue for future management of a network which includes more SuDS. The Environment Agency said "It is important that the right blend is set out within the plan to ensure that at future Price Review / AMP / WINEP cycles funding is best aligned to the right programmes. Our experience with PR19 is that the shift of funding from direct property alleviation to generic SuDS roll out has had a detrimental impact on our ability to collaborate with you. The proposed 'go steady' delivery approach risks an environment where, should it not be achievable at the scale anticipated, a significant shift in approach could be required at a late stage within the DWMP, putting the goals at risk. Thames Water should increase funding beyond £5m to develop SuDS schemes that achieve the delivery aspirations in the plan.	Insight Sources v18: SP20 DWMP Consultation Response – You said we did. May 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Stakeholder views | Detailed Insights

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Sub-topic	Detailed Insights	Key Sources
Priorities when planning for a resilient wastewater system for the future (1/5)	Customers understand that with a growing population, different climate patterns and ageing infrastructure, there is a need for investment to maintain a reliable sewerage service. Customers place a high value on maintaining sewage services and reducing the risk of sewer flooding, in particular. How we are maintaining sewage infrastructure now is a key indicator of the confidence that customers have in how we can cope with future challenges. (SP8, SP9) Customers' highest priority is placed on asset health (keeping sewers and pipes in good working condition). Waste-only customers want to see Thames Water leading the way and working collaboratively to proactively improve their infrastructure, ensuring they communicate progress to customers. (SP9, CX65) Support for the Thames Tideway Tunnel is an indication of customer support for a sewerage system capable of coping with future demand. Support for the project is significantly higher than opposition. (SP8) Resilient sewer network for the future (ensuring that sewers can prevent sewage overflows into rivers in the face of climate change) is seen by most as a great initiative from us and that it showcases our commitment to sustainability (64% of customers view it as positive). A small minority feel timescales are lacking and doubt we can deliver as promised. (PR24-2) Customers expect us to protect against severe hazards that may be increasingly likely in the future such as weather, technology and socio-political events. They think about the impact that the hazard would have on services, rather than the hazard itself, and would not want services to deteriorate. (PR24-2) Stakeholders see Thames Water working hard to progress but see development of infrastructure as a key long-term challenge. When pollution or flooding incidents occur, they are likely to gain greater traction in the media impacting Thames Water's stakeholder reputation and the level of understanding from customers. Some stakeholders, especially MPs, are aware of the challenging context of addressing ageing Victorian infrastructure and the high costs of investment and are therefore less critical of the sector, however, most are unsympathetic to the perceived lack of progress Thames Water has made on this in recent years. (S14) Regulators think the whole industry needs to take on greater responsibility for their investments and key assets. (S14) Local authorities want Thames Water to ensure a constant and safe supply of water and wastewater services today and in the future by operating the assets you have effectively and efficiently, ensuring assets work as they are intended, and where required investing in new assets and processes to ensure services can continue to be delivered (S18)	Insight Sources pre-v17: CX65 Affinity Water – Water Community Insights Summary: Sewage, May 2022 PR24-2 PR24 Foundational Research - Customer Voices, November 21 SP8 DWMP - Customer Research: Part 2 Qualitative Research: Final Report, October 2021 SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021 S14 Stakeholder Reputation Research, March 2022 S18 Research Summary Form - Local Government, June 2022

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Priorities when planning for a resilient wastewater system for the future (2/5)	Stakeholders consider that the risk of flooding from rainfall will likely increase and is seen as unpredictable and out of Thames Water's control. Nonetheless it is considered a high priority to plan for due to the distressing nature of sewer flooding. (S1) Stakeholders encourage us to be ambitious in our investment in infrastructure to ensure resilience against more extreme weather, and want to continue engaging with us to identify opportunities which developments will have on our wastewater resilience plan. (S1, S8) Upon review of DWMPs, the regulator felt generally that plans lacked: - consideration of storm overflows - companies have not consulted on the same basis for reducing harm from storm overflows or the frequency of spills, nor consistently with what they will need to plan investment for in business plans - convincing evidence presented in plans to demonstrate that the proposed investment needs are the right ones for the long-term, and costs and benefits of solutions are not fully developed or evidenced, particularly where schemes have the ability to deliver multiple benefits for customers and the environment - ambition, particularly regarding improvements that can be made from base expenditure, such as plans having a strong focus on risks that can be reduced through better asset management and optimisation of existing networks. Ambition is also lacking in proposing and prioritising nature-based solutions or surface water separation options. This is despite these being key considerations in the WaterUK technical framework, and explicitly stated in the guiding principles and the storm overflow reduction plan. - focus and maturity in the development of partnerships with other RMAs or third parties which are key to maximising benefits that can be delivered within catchments. (S35) Overall, respondents had a reasonable level of awareness of the implications of climate change and population growth for the wastewater system. Most were at least "somewhat aware" (around 3 in 4), suggesting that the larger part of the sample had some initial reference point for the survey topic and understanding as to overall context and need for the DWMP. The results were similar for non-household respondents, with around 70% of respondents (n=300) at least "somewhat aware" for both questions. (SP16)	**Insight Sources v17:** S35 Ofwat Letter to CEOs – DWMP Consultation Response, October 2022 SP16 DWMP Customer Consultation, September 2022 **Insight Sources pre-v17:** S1 Stakeholder Asks, February 2022 **Pre-2020 Insight Sources:** S8 Summary of stakeholder engagement undertaken for PR19 business plan, April 2019

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Detailed Insights
Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Priorities when planning for a resilient wastewater system for the future (3/5)	Customers' top 5 customer DWMP option preferences were (SP8): • Managing rainwater to prevent or slow the flow into sewers in the local community (65%); • Use awareness and education campaigns to reduce the amount of wastewater and contaminants in the wastewater system (64%); • Increasing the capacity of the existing wastewater system (60%); • Using advance technology to improve existing wastewater treatment works (59%); • Rainwater collection and use in buildings (57%) Customers also view education as important, in keeping with the previous discussions on the challenges and issues facing the drainage and wastewater network. Customers recognise the benefits of tackling issues at source, though some noted it may be of limited success so it would need to run in parallel with other options. (SP8) As expected, cost is also a top level consideration and further research will need to test the balance between the pace of investment and customer bill impact. (SP8, SP9) Respondents tended to favour an "even" pace of investment (most preferred profile for in both London (household: 49%, non-household: 45%) and Thames Valley (household: 49%, non-household: 53%), as this was viewed as a balance between risk and higher upfront cost of "fast" vs. delay in "steady". The main reasons cited for choosing "even" were there is more time for planning to ensure the targets are actually met and to have a lower bill impact upfront that will be more affordable for customers. (SP16) The current proposed plan was the most preferred (London: 35%; Thames Valley 45%), main reasons being the plan represents value for money and it is more affordable than the enhanced plan. The enhanced plan was the second most preferred. (SP16) Higher levels of acceptability in higher socio-economic groups (SEG) in London - more even views of acceptability across SEG in Thames Valley, suggesting that household circumstances were not necessarily the sole factor determining support for the plan. Customers more likely to find the plan acceptable if: • Respondent had a higher income • Respondent was aware of the need to upgrade sewage treatment works • Respondent was aware of increasing flood risk (SP16)	Insight Sources v17: SP16 DWMP Customer Consultation, September 2022 Insight Sources pre-v17: SP8 DWMP - Customer Research: Part 2 Qualitative Research: Final Report, October 2021 SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Priorities when planning for a resilient wastewater system for the future (4/5)	The plan was unacceptable to a sizeable minority of respondents (around 25% “unacceptable” or “completely unacceptable”), main reasons being the scale of the bill impact (unaffordable) and are against bill increases in principle (customers should not have to pay for the plan). Customers more likely to find the plan unacceptable if: • Respondent was in lower socio-economic group • Respondent had a higher current bill amount • Respondent preferred a reduced scale of plan (SP16) Regulators asked Thames Water to provide more granularity in how targets have been applied in the plan for areas inside and outside of London. They also wanted groundwater to be included as a risk/planning objective to provide focus. (SP20) In general, customers wanted a balanced [DWMP] that makes progress across a number of areas like flooding, resilience, sewage treatment works upgrades and storm overflows. Customers did not support focusing our plans on one specific challenge, particularly if that was to the detriment of addressing other needs which have been identified in the course of developing the DWMP. (SP20) Stakeholders expressed that the targets set in the plan should be SMART, i.e., specific, measurable, achievable, relevant, and time-bound; and, in particular, that they should be broken down into interim targets, against which progress could be monitored. Regulators indicated that there was a lack of clarity around activities and milestone targets within the short, medium, and long term timelines. (SP20) Regulators expressed that the adaptive planning approach should be applied to all areas of the plan or use Ofwat’s common reference scenarios as defined in the Long-Term Strategy Document Guidance. They also indicated testing should be completed to evidence how the plan will adapt to future influencing factors like climate change. (SP20) The regulators also expect Thames Water to include asset resilience (now and in the future) to fluvial and coastal flooding, as well as power failure. (SP20) Regulators raised concerns that the dDWMP had insufficient and unconvincing evidence for Thames Water’s PR24 investment cases. They also highlighted that Thames Water's goals will require significant changes to the way flood risk is managed and the mechanisms behind how projects are funded today. (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You Said We Did. February 2023 Insight Sources pre-v17: SP16 DWMP Customer Consultation, September 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

WS1. I want you to prevent sewer flooding and take waste away safely / Wastewater network resilience

Stakeholder views | Detailed Insights | Vision 2050

Sub-topic	Detailed Insights	Key Sources
Priorities when planning for a resilient wastewater system for the future (5/5)	Regulators would like to see a high-level road map for how to ensure future Price Reviews / AMP / WINEP cycles create the right funding environment to ensure the right projects receive funding. (SP20) Regulators felt that there was no evidence of joint thinking with Thames Water's clean-water business in respect to the groundwater environment or WINEP investigations and catchment schemes. (SP20) Regulators indicated that more evidence should be provided around the costs and benefits of solutions, in particular with schemes delivering multiple benefits. Regulators also wanted evidence explaining why alternative options were discounted. (SP20) Customers showed a clear preference for an even paced delivery profile for the DWMP (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 dDWMP planning period, and earlier delivery of the solutions would be preferred. (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You Said We Did. February 2023 Insight Sources pre-v17: SP12: Vision 2050 Research, May 2022
Vision 2050: *Help reduce disruptive rainwater flooding (Ranked 11th / 19 Vision 2050 goals tested with customers)*	This is an important issue for some customers because more have first-hand experience (or know someone who has been impacted) with flooding and its destructive disruptions. A few feel flooding to be unpredictable and difficult to fully prevent, therefore not a top priority issue for Thames Water to be involved in. (SP12) Most feel it makes sense for Thames Water to get involved because of their plans for new drainage infrastructure. Some customers particularly like the plan for 'green drainage' and environmental forward thinking. (SP12) 89% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. The majority feel it is achievable and an essential preventative measure, especially considering climate change, however, a few question whether it can be accomplished due to the unpredictable nature of floods. (SP12)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Insight synthesis

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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Internal sewer flooding	High	Highly important because of high degree of impact to peoples' lives e.g. health, potential move-out

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

Key evidence sources*

PR24 foundational research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 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.

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

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Attitudes towards sewer flooding (1/2)	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. For many, the impact of sewage flooding feels most severe, tangible and dangerous given the potential for personal belongings and property to be damaged in the long term as well as the potential for health risks from the bacteria. As a result, many feel the targets could be more ambitious both in terms of timelines and overall targets. (PR24-12) Customers are alarmed at the idea of sewage flooding happening near or at properties. (PR24-9) It is recognised as hugely impactful both personally (emotionally) and on homes. Broader concerns about climate change made this issue feel more likely in the future. Customers note that frequency of severe weather may increase and feel the proposed improvements are not enough. (PR24-12) Customers often view this enhancement (reducing sewer flooding from heavy storms) through the lens of personal experience. They feel it's of greater importance if they, or someone they know, have been impacted. 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. (PR12-12) Just over half of customers are satisfied with Thames Water's actions to minimise sewer flooding in 2022, however, this is a slight increase from the previous year. (CX64, CX110) Customers believe Thames Water should address all sewer flooding/spilling incidents, but they prioritise a reduction in sewer flooding into/near properties - many want this practice to end as soon as possible and do not know what is being done to prevent this. (PR24-9) Many attribute the causes of sewer flooding to blockages caused by a largely misinformed public, followed by low sewer capacity and old infrastructure. (PR24-9) For both non-household and household customers, the highest priority of wastewater service improvements was to reduce property flooding. (SP16)	Insight Sources v18: CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 Insight Sources v17: PR24-12 PR24 Enhancement Package Options research , September 2022 SP16 DWMP Customer Consultation, September 2022 Insight Sources pre-v17: CX64 CCW Research Report Water Matters 2021-2022 - Summary of research findings for Thames Water, Undated PR24-9 Deep Dive: Waste system headroom, February 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Attitudes towards sewer flooding (2/2)	Flood prevention remains a high-priority for many stakeholders in London. Most now understand this is the responsibility of many organisations but there is still a focus on what Thames Water is doing to protect customers. (S38) Stakeholders highlighting that flooding issues becoming more prominent across whole of western region (Thames Valley) in same areas as previous wet winters. (S38) The customer survey research indicated that there were mixed views towards sewer flooding and storm overflows. On balance, respondents scored sewer flooding as a more pressing issue than storm overflows, but around a third of respondents felt that both issues were of equal severity. (SP20) Over 50% of household customers supported more stringent storm overflow targets at added cost (in bills) to customers. This level of support reduced if added investment came at the expense of efforts to reduce flooding (<50%). On the contrary, non-household customers expressed higher levels of support for more stringent storm overflow targets, even if it resulted in higher bills / came at expense of efforts to reduce flooding. (SP20) Stakeholders provided feedback towards the sewer flooding targets in the DWMP. They are concerned that the defined property protection up to a 1 in 50-year storm is not ambitious enough. (SP20) Stakeholders expressed that with more frequent and intense storms, Thames Water should be considering higher return period events, however stakeholders highlighted that adjusting the targets to higher return periods would increase the cost of the plan, which would be a concern. (SP20) As part of the wastewater online community, respondents ranked 'preventing sewer flooding to properties' as the most important issue of all wastewater topics for Thames Water to improve (PR24-15)	**Insight Sources v18:** S38 Elected representative issues tracker, May 2023 SP20 DWMP Consultation Response – You Said We Did. May 2023 PR24-15 Enhancement Case Deep Dive Research. May 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Stop all sewage flooding into homes, gardens and businesses (Ranked 3rd / 19 Vision 2050 goals tested with customers)*	Customers believe protecting homes, gardens and businesses from sewage flooding is an essential core function of Thames Water. They admit their perceived importance of the issue would increase hugely if it were to personally impact them but assume this is very unlikely given the numbers provided. Many do not think about the growing pressures on the network in the future and so believe that while the goal is important, other initiatives relating to fixing leaks, and protecting the environment should be prioritised. (SP12) Customers believe the goal is essential so that standards do not slip. Due to lack of personal experience of the issue and interpretation that only very few homes are impacted, most admit other initiatives resonate stronger with them and should be prioritised over this goal. (SP12) 93% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. The majority feel that the timescale to achieve behaviour change is slow and believe this can be done faster and a small minority feel that working with local councils could hasten positive behaviour change. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Enhancement case / Improving resilience to sewer flooding in homes (1/2)

Enhancement Insights

	I want you to prevent sewer flooding and take waste away safely
Key activities	• Sustainable drainage schemes. • Addressing misconnections (surface to foul and combined water systems). • Partnership projects.
What customers get by 2030	• Reduces risk of flooding up to a 1 in 50-year storm for 1,018 properties with sewer flooding history, protecting in total 5,509 from current and future risk. • Establishes partnerships to leverage wider benefits. Pilots resilience to extreme events.

Relative priority of enhancement area: 1st/13

Key Sources:
PR24-1 PR24 Foundational research - An analysis of customer views and expectation of Thames Water
PR24-9 (Deep Dives: Waste System Headroom)
PR24-12 PR24 Enhancement Package Research
SP12 Vision 2050 (Stop all sewerage flooding into homes, gardens and businesses
SP16 DWMP Customer Consultation
SP20 DWMP Consultation Response – You said we did
PR24-15 Enhancement Case Deep Dive Research
PR24-14 Acceptability and Affordability Testing (Qualitative findings)

Engagement supporting the need

- Of the 8 enhancement cases tested with customers as part of the deep dive research, preventing sewer flooding was ranked a close second in terms of issues which Thames Water should prioritise. However, when customers were asked to rank their priorities for wastewater topics, sewer flooding was ranked top. Future bill payers were more much more likely to prioritise this issue than household and non-household customers, however all groups believe sewer flooding is very important to address. (PR24-15)
- The idea of customers properties flooding with sewage disgusts and concerns many – they feel it is part of Thames Water's essential duties to protect customers, and expect Thames Water to make significant investments to protect customers from this. Customers also mentioned concerns about public health and how sewer flooding could present a serious health hazard and contribute to a rise in disease. There were also concerns about potential impacts on wildlife and the psychological toll imposed by damage to people's homes. Many mentioned they would be "upset" if Thames Water chose not to complete the upgrades. Others mentioned it would be "unacceptable". (PR24-15)
- Sewage flooding inside is perceived to be worse than outside, however, both are felt to be unacceptable/inhumane/health risk/disgusting. There is a sense of empathy with the Victorian infrastructure which Thames Water operate, however, customers are becoming impatient – they want to see more proactive actions from Thames Water and increased communications around 'unflushables'. (PR24-14)
- Customers believe protecting homes, gardens and businesses from sewage flooding is an essential core function of Thames Water. They admit their perceived importance of the issue would increase hugely if it were to personally impact them (PR24-9, SP12)
- Sewer flooding inside a public building is considered 2.2 times worse than in public space; in your property is 2.5 times worse and a household with special needs is 2.9 times worse (PR24-1)
- Customers are alarmed at the idea of sewage flooding happening near or at properties. Customers believe Thames Water should address all sewer flooding/spilling incidents, but they prioritise a reduction in sewer flooding into/near properties. Many want this practice to end as soon as possible and do not know what is being done to prevent this. (PR24-9)
- Of Thames Water's core wastewater service improvement areas, reducing sewage flooding is the highest priority for customers. For many, the impact of sewage flooding feels most severe, tangible and dangerous given the potential for personal belongings and property to be damaged in the long term as well as the potential for health risks from the bacteria. As a result, many feel the targets could be even more ambitious both in terms of timelines and overall targets. (PR24-12)
- This was echoed in DWMP research, for both non-household and household customers, the highest priority of wastewater service improvements was to reduce property flooding. (SP16, SP20)

Engagement supporting the solutions

- **The vast majority of customers support our plan** to prevent sewer flooding, with the majority of customers wanting this to happen by at least 2040. (PR24-15)
- **'Achieve no sewer flooding by 2040'** was by far the most preferred investment option of all customer groups. They see investment in tackling this issue as crucial in rectifying underinvestment in infrastructure to protect customers, however, some expressed concerns around the increased level of disruption and upfront costs. There was also the continued sentiment amongst some that this is a very rare issue and therefore feel it is not a priority. Customers want to understand why Thames Water has given itself this timeline to reduce sewer flooding (2040), as most would want improvements to be made more quickly to reflect the risk of increasing damage over time. (PR24-15)
- A sizeable minority of customers opted for '**achieve no sewer flooding by 2050**', largely as it was seen as the most economically viable option with less disruption. However, many felt this timescale to address an unacceptable risk to customers was too long. (PR24-15)
- The vast majority of customers perceive both options of **no additional investment** or **achieving this goal by 2065** as unethical with the exception of some older customers who feel they will not benefit. (PR24-15)

WS1. I want you to prevent sewer flooding and take waste away safely
Enhancement case / Improving resilience to sewer flooding in homes (2/2)
PR24 Deep Dive

Enhancement Insights

Address all sewer flooding/spilling incidents, but prioritise a reduction in sewer flooding into/near properties.

Customers support the methods proposed by Thames Water to reduce sewer flooding between now and 2030 and the outcome of having reduced sewer flooding of 50%.

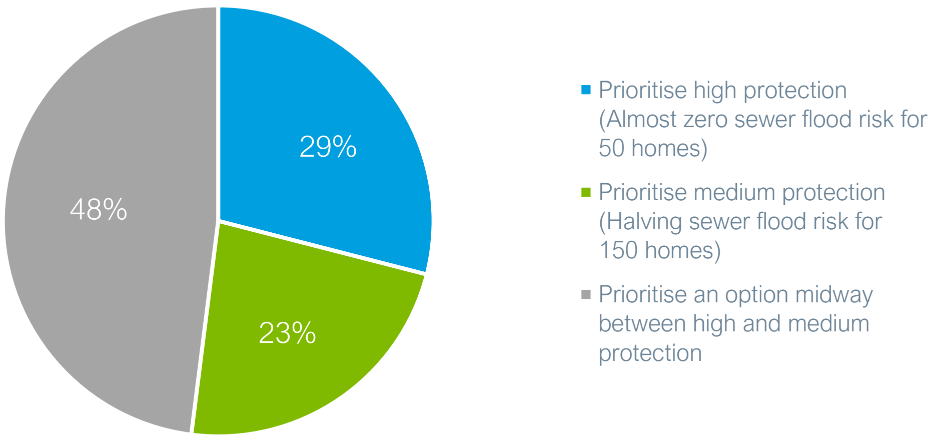
61% of customers prioritised the reduction of sewer flooding into/near properties, 25% prioritised reduction of sewer spills into rivers and 14% prioritised reduction of surface flooding

Generally, customers see the benefits of both green and grey solutions and believe a mix of both is best.

- Green solutions are natural solutions that could absorb surface rainwater, preventing it from entering sewers, such as increasing porous paving and green spaces in built up areas.
- Grey solutions are artificial constructions, giving extra capacity in the wastewater network, so large volumes of sewage and surface rainwater can be held, such as building new or larger sewer pipes or storm tanks at treatment works

However, many customers want further information surrounding costs and a better understanding of the level of risk reduction.

Customers favour pursuing an approach **midway between medium and high protection**

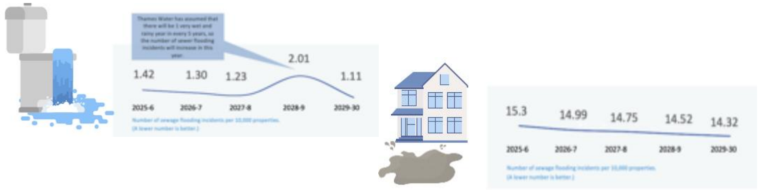


- Medium protection: almost halving the chance of sewer flooding in any one year for 150 homes using 'green' solutions with potentially no or very low impact on bills
- High protection: almost eliminating any chance of sewer flooding in any one year for 50 homes using a mix of 'grey' and 'green' solutions with potentially a small impact on bills (around £1 a year)

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

Performance Commitment – Sewer flooding

Customers' views on proposed performance commitments were gathered through recent qualitative Acceptability and Affordability Testing (PR24-14)



Actions and benefits	Better manage pumps, valves and water pressure to reduce strain across the network Have more staff and equipment to fix problems
Importance	High
Current performance	Unacceptable
Headline message	Internal: 'nothing worse than this even if it's not me' External: 'better out than in'
Response to Target	More ambition wanted
Keen to understand / see	Proactive alerts/action Speedy response Customer education
Divergence across segments	None

Overall response

- Sewage flooding inside is worse than outside
- However, both are felt to be unacceptable/inhumane/health risk/ disgusting
- Citizen perspective vs service user dominates – 'do it for others'
- Primary school recently flooded; excellent response but should have been prevented Customers have sympathy with 'Victorian sewers' but sense of impatience
- Want greater proactivity and 'flushing' communications

Performance against target / other companies

- Poor performance (or no target) is unacceptable
- Low numbers but multiplied up feel significant Industry performance shows that some companies have addressed this
- Current performance is helpful to see improvements but still not enough

Response to 2025-2030 target

- Both targets are reducing which is positive
- Not sure how feasible it is to do more – is this possible?

Business plan and quantitative considerations

- Initiatives are interesting and feel significant e.g. physical changes, early warning signs, education to schools/families/non-household
- Framing within problems of extreme rainfall help understanding
- Super sewer mentioned as positive investment; unsure as to how this fits with current investment plan
- Keen to see plans for 'structural change' in the sewer network or something that diverts rainwater

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

Insight synthesis

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.

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

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

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

Detailed Insights

Segmented Insights

<table>
<tr><th>Sub-topic</th><th>Detailed Insights</th><th colspan="2">Key Sources</th></tr>
<tr><td rowspan="5">Customer knowledge of blockages</td><td rowspan="5">Most customers agree we should do more to maintain the network and reduce blockages and sewer flooding. 80% of customers believe that improper disposal of waste from residential properties and businesses is a main cause of sewer blockages. (CX43)

There is some awareness that pouring fats, oils and greases down the sink is not a good idea – but this is usually heavily dependent on first-hand experience of the consequences. (R37)

Customers assume blockages on their pipes are their responsibility, though for some it is a grey area and they would appreciate clarity, particularly when caused by other properties in the street. They appreciate any help we may offer, even if after investigation it transpires it is their responsibility. Customers living in blockage prone areas call for a better customer experience, where resolution and communication are more effective. Blockages lasting more than 24 hours, or happening twice a year or more, are seen as unacceptable. (CX43, PR24-1)

Most non-household customers agree that customers have a role to play in helping avoid problems with the wastewater system, and that this should come alongside more information about what not to put down sinks and flush down toilets. 82% of non-household customers also agree that it is better to repair and replace sewers when they show earlier signs of wear and tear, even if it costs more money in order to avoid storing up problems. (SP9)

Non-household customers are more divided in establishing whether the long-term plan for the wastewater system should focus on improvements to the sewers Thames Water is responsible for or putting forward schemes that benefit other parts of the drainage system. These customers are also split on whether responding quickly to wastewater flooding and helping customers recover from the flooding is more important than preventing the flooding from happening in the first place. (SP9)

Respondents are aware that certain items should not be flushed down the loo or poured down the drain. They are aware of the problems this will cause, both for themselves and for the infrastructure that serves them. (CX104)</td><td colspan="2">Insight Sources v18:
CX104 Thames Water perception & behaviour research, May 2023

Insight Sources v17:
R37 CCW Sink Sense: Kitchen sink habits caught on camera, June 2022

Insight Sources pre-v17:
CX43 Bin it, don't block it' Behaviour Research, July 2021
PR24-1 PR24 Foundational Research - An analysis of customer views and expectation of Thames Water, November 2021
SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021</td></tr>
<tr><td colspan="2">Insight Triangulation Key</td></tr>
<tr><td>Robustness of evidence</td><td>Med</td></tr>
<tr><td>Divergence of view (by group)</td><td>Low</td></tr>
<tr><td>Regional differences</td><td>Low</td></tr>
</table>

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

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Education and campaigns	Customers consider it a priority to be educated about what can and cannot be put into sewers and feel we should directly engage with customers to understand the consequences of their actions and help them behave responsibly. They are supportive of education programmes in schools. (CX43) Stakeholders also highlight the importance of working with children to convey messages about issues such as water efficiency and sewer abuse and embed behaviour change. Stakeholders suggest that we do more to work with partners to support us in conveying messages on issues of genuine common cause. (S8) Customers generally expressed a low awareness about their role in causing and preventing blockages and indicated that they had not seen relevant communications from Thames Water. There is limited insight into customers' understanding and acceptance of the significance of their behaviours in preventing blockages. (CX43) The Bin it Don't Block it Behaviour change campaigns have been successful in increasing awareness and understanding of this issue and many, including food service establishments claim it has changed their behaviour. However, behaviours and attitudes of a large proportion of customers towards the improper disposal of certain items appear to be strongly embedded and difficult to overcome. Whilst many agree it makes them think more about waste disposal, there has not been a corresponding change in behaviour. (CX43, PR19-9, CX70). Future bill payers especially have a low awareness of Bin it Don't Block it campaign (S26). In the absence of information: • Customers are aware that wet wipes and fat are an issue but full and detailed knowledge is low • They have a mechanical view of waste and drains and develop their own rules of thumb of what they think is acceptable to dispose of down the drain • They think of their own home and environment rather than the bigger picture • This is an out of sight, out of mind issue where once gone from the sink or toilet it is forgotten • Customers' current behaviour and thus potential barriers to change revolve around three key factors: convenience, hygiene and risk. They want to avoid anything that will increase inconvenience, or be more unhygienic in their eyes and many think there is a low risk of causing a blockage because it hasn't happened so far. • If customers have experienced a blockage they are likely to have a different attitude, but this is relatively rare. (CX43) When asked about the method of communication (leaflet vs. video), customers in London prefer a leaflet while customers from other regions find video more engaging and harder than mail to overlook. (CX43, CX70)	**Insight Sources v17:** S26 Research Summary Form – PR24 Youth Session, July 2022 **Insight Sources pre-v17:** CX70 'Bin it, Don't Block it' Campaign evaluation (post-wave), April 2022 CX43 Bin it, don't block it' Behaviour Research, July 2021 **Pre-2020 Insight Sources:** S8 PR19 Summary of Stakeholder Engagement, April 2019 PR19-9 CR26d Deep Dives, sewer flooding and blockages, BritainThinks, October 2016

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

4.6 For Communities – Detailed Insights

Wants

Summary of Insights – For Communities

The 'for Communities' pillar has 1 Want, broken down into 3 Topics

Wants	CI1. I want you to have a positive impact on the community		
Topics	Corporate Social Responsibility and local impact	Transparency	Biodiversity
Sub-topics	• Giving back to local communities • Corporate social responsibility • Minimising impact of works	• Ownership and profits • Open and honest • Public role • Trust and perceptions of Thames Water and the water sector • Engagement and relationship with customers and stakeholders	• Providing access to our sites for recreation • Attitudes towards improving biodiversity

Topics

CI1. I want you to have a positive impact on the community /

Corporate Social Responsibility and local impact

Insight synthesis

Customer widely expect Thames Water to undertake corporate responsibility activities throughout the region, such as charitable donations and educational programmes.

Customers think it is important that Thames Water acts in a responsible manner. Customers think that giving to local charities and supporting local initiatives shows that Thames Water cares about the communities it serves. Customers expect accountability and transparency from water companies and want companies to act honestly.

Customers want Thames Water to reinvest into the communities it operates in. Where we have a presence in local communities, customers expect us to minimise the impact of our sites. Customers welcome jobs and apprenticeships for local people, involvement in local issues, community investment programmes and access to sites for recreation.

Customers living near our sites expect us to keep the impact on their local neighbourhood to a minimum and for us to take responsibility for any incidents. Our sites should be hidden, well maintained, and staff should be respectful.

Customers recognise the need for roadworks but consider them disruptive. They want advance warning and information, co-ordination with other utilities and authorities and speedy completion.

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

CI1. I want you to have a positive impact on the community / Corporate Social Responsibility and local impact

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Giving back to local communities (1/2)	Customers want Thames Water to reinvest into the communities they operate in. Local activities based around a site have the greatest potential to positively impact the community. Whilst community goals are seen as important, many feel this should not be a priority for Thames Water given their essential core services. (SP15) These local activities are in addition to broader corporate responsibility activity that is expected of a large company and should be offered throughout the region. Communities where we have a presence welcome more of such activities. (S2, PR24-2) Customers support investment in the local community such as: • Jobs and apprenticeships for local people • Using influence and resources to assist or support local causes • Activities that help to reduce the disruption where we have long term roadworks in an area • Activities that enhance the local environment (PR24-2) Some customers feel that Thames Water could work collaboratively with local businesses and organisations, such as schools, to bring improvements to local areas with more specialised support. (SP15) Households and non-households held similar views regarding the most important aspects relating to their local community, 'Local employment opportunities' is viewed amongst the most important, however 'the promotion of local heritage' and 'The economic benefits of visits to your local area' was prioritised less. (SP18) Customers feel building skills and knowledge across Thames Water's own workforce to be important to guarantee an ongoing high-quality service, as well as to develop and apply new technology. However, this is seen as a lesser priority for Thames Water. Similarly, customers view keeping Thames Water's employees safe at work as an ethical obligation. (SP15) NGOs view Thames Water's local initiatives and outreach programmes as a highlight because it directly recognises local communities, especially in more rural areas. However, others feel expectations are high due to the size of Thames Water (i.e. their capacity and ability to make substantial changes above all water companies) with varying tangible success. Progress made on a local level through initiatives, outreach and incident response may be undervalued due to the overarching feeling that there is a lack of investment in certain areas compared to others. (S14) NGO stakeholders with interest in environmental matters praise Thames Water specifically for repurposing Thames Water's land to be of benefit to local communities and the environment. (S39)	Insight Sources v18: S39 Stakeholder Reputation Research Report. March 2023 Insight Source v17 SP18 Water Club - Strategic Resource Options - Added value research, November 2022 Insight Sources pre-v17: S14 Stakeholder Reputation Research, March 2022 SP15 Thames Water Customer Voices Public Value Research, May 2022 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 S2 Vision 2050 stakeholder feedback summary, July 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community /

Corporate Social Responsibility and local impact

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Giving back to local communities (2/2)	Overall sentiment on 'giving back' to the community is strong. While some customers claim this is not a priority for them, they still mention local initiatives that they would like to see Thames Water support, including: providing education about water and water-saving locally, supporting local charities, helping improve recreation sites, providing water fountains in local areas, apprenticeships for local people. (PR24-2) Customers want Thames Water to reinvest into communities that it operates in by helping charities and supporting local initiatives, and their preferences vary according to their local context. Additionally, customers would like to hear what charities and communities receive support from Thames Water. Although, some feel this should not come at the expense of delivering core services. (PR24-2, SP11) Many customers were enthusiastic about local charities receiving funding and support for vulnerable members of the community. Customers want to help those vulnerable and less well off ensure that they can pay their bills. (PR24-2) Customers believe Thames Water should provide education on saving water. Regarding Thames Water water refill station, usage is low but continues to rise, and there is plenty of headroom for adoption among those open to it. Refill stations continue to offer positive brand associations for Thames Water. (CX114, PR24-2) Customers would like Thames Water to use a range of channels to communicate these types of initiatives in the locality including, for example, local press, posters on the site and in local shops and community centres. They do not want leaflets through their doors on community investment activities. (PR19-13) Future bill payers are significantly more likely to claim they have not and would not use a water refill station. (CX105)	**Insight Sources v18:** CX105 Brand survey 2022/23 Future customer analysis, 2022/2023 CX120 C-MeX CES and Brand Survey Q1 23-24, August 2023 **Insight Sources pre-v17:** S14 Stakeholder Reputation Research, March 2022 CX24 Brand Survey (Q3 2021/22), December 2021 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 SP11 Smarter Water Catchment Survey, November 2021 **Pre-2020 Insight Sources:** PR19-13 CR32 Being a good neighbour, March 2017 PR19-26 CR66 Corporate and Financial Responsibility, BritainThinks (Jul 2018)
Corporate social responsibility	A small majority of customers agree that Thames Water is a responsible company but fewer than half of customers agree that Thames Water informs them of the good things it is doing for customers and their region. Authenticity is a core emerging trend - customers feel entitled to assess all aspects of corporate activity. (PR19-26, SP11, PR24-2) There is also a trend towards being eco-aware – these consumers expect environmental corporate social responsibility as a default without customers bearing the cost. For them, 'Doing the right thing' is be seen as a fundamental approach to the way a company operates. (PR24-2) Appetite from customers to hear more from Thames Water about their initiaitives has increased across the vast majority between Q4 22/23 and Q1 23/24. (CX120) NGOs think that Thames Water could and should do more to promote their contributions to local initiatives. Although financial support is obviously important to these organisations, many point to their consistent commitment and presence as a reason for Thames Water being a notable partner. (S14)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community /

Corporate Social Responsibility and local impact

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Minimise impact of works (1/2)	Customers expect low levels of disruption as a minimum, such as hidden, well-maintained sites with respectful staff and contractors. They want Thames Water to take responsibility for any incidents that do happen. (PR19-7) Customers living near sewage treatment works understand they are more likely to notice some impacts. Customers living near sludge sites generally view the impact on them as minimal; any odour, vehicle movement or noise issues were generally seen as infrequent and part of ‘country life’. However, customers say they would find odour intolerable if it penetrates their home. An odour lasting for 8 hours starts to become problematic and a day or more is seen as intolerable. (PR19-7, PR19-13) In 2022, over 7 in 10 of customers were satisfied with Thames Water’s action to reduce smells from sewage treatment works (which is a significant increase from two thirds in the previous year). (CX64, CX110) When things go wrong, there should be minimal disruption and customers should barely notice. If this isn't possible, customers want us to understand the issue, tell them what we are going to do and deliver on that promise. (CX45) Customers support investment in the local community that includes activities that reduce the disruption of our sites. (PR24-2) Capital delivery partners expect Thames Water to carry out work in the least disruptive way possible and take responsibility for the impact of work on the community. (S22) Customers see roadworks as an inconvenience and disruptive. Customers recognise the need for them, but want advance warning and information, co-ordination with other utilities and authorities and speedy completion. (PR19-13) Most customers affected by Thames Water roadworks see them as inconvenient and disruptive to their daily lives. They dislike lack of advance warning, works going on for protracted periods, not seeing anyone working at the site and apparent lack of coordination with other utilities or highway authorities. (PR19-13) However, at the same time, customers recognise the need for repairs and maintenance and want to see evidence of active upgrading of the network. (PR19-13) They feel that works should be planned, rather than emergency, as far as possible. Customers want advance notice, works carried out as quickly as possible, co-ordination with other utilities/highway authorities to avoid digging up the road multiple times and information about what roadworks are for and how long they will last. (PR19-13)	Insight Sources v18: CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 Insight Sources v17: S22 Research Summary Form: Capital delivery non-infrastructure partners, August 2022 Insight Sources pre-v17: CX64 CCW Research Report Water Matters 2021-2022 - Summary of research findings for Thames Water, Undated CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 Pre-2020 Insight Sources: PR19-7 CR26c Deep Dives Odour, BritainThinks, March 2016 PR19-13 CR32 Being a good neighbour, BritainThinks, March 2017

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Corporate Social Responsibility and local impact

Sub-topic	Detailed Insights	Key Sources
Minimise impact of works (2/2)	They also expect that sites are safe and secure, considerate and respectful behaviour when we are working in local neighbourhood and that we take responsibility for any issues that may occur. (PR19-13) Whilst customers supported replacement of both trunk mains and distribution pipes, customers said communication of works must be clear and accessible. (PR24-10) Customers expect personal and proactive engagement and communications. Any roadworks in the local area that last for a week or more are considered long term and they expect to be consulted on any local issues. Customers want to be informed on: • What the works are for • How long they will last; • To be given a named contact and to be • Updated if anything changes. (PR19-57) In particular, customers stressed importance of effective and consistent communication throughout the process of fixing leaks, especially around the effect on traffic and roadworks. Despite some customers being satisfied with Thames Water's communication, others felt Thames Water needs to take a more active role in keeping customers informed at all stages, through a range of different channels to reach as many of those impacted as possible (digital- email, social media, app, local networks, empowered engineers on the ground, leaflets through doors.). (CX45) Customers highlighted they want information pushed directly from Thames Water, rather than needing to rely on informal channels such as Facebook groups (CX45). Customers generally respond positively towards signage that reflects our refreshingly clear brand values and this helps to create a more favourable impression of Thames Water, but this is not in widespread use. (PR19-57)	**Insight Sources pre-v17:** CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020 PR24-10 Deep Dive: Trunk Mains and Replumb London, February 2022 **Pre-2020 Insight Sources:** PR19-13 CR32 Being a good neighbour, BritainThinks, March 2017 PR19-57 CX29 Hatton Garden Streetworks, Populus, May 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community /

Corporate Social Responsibility and local impact

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources	
Vision 2050: *Create attractive jobs for people in our communities (Ranked 18th) / 19 Vision 2050 goals tested with customers)*	Creating attractive jobs for people in our communities is an important issue for most customers. While customers see the importance of supporting diversity and improving training, when compared against other issues this is less of a priority. Despite this, there are some who highly support this initiative. (SP12) The goal is supported by most customers who believe this is a worthwhile and realistic plan to achieve, however, many question why this plan would take that long. (SP12) 90% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most feel this is sensible for Thames Water to be involved in and many are surprised this is not a plan Thames Water had already in place. For the majority the 2050 goal is too far away. Many believe this goal should be addressed more urgently. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022	
Vision 2050: *Use the land Thames Water owns to create jobs and housing (Ranked 19th / 19 Vision 2050 goals tested with customers)*	Although many customers see the need for more housing, overall opinions on this issue are mixed. Some customers show little interest in the topic, others feel the land should be used as green spaces and others are concerned around how the land would be used for housing given the need for affordable homes. Some see this as common sense with the available land, others see more pressing issues for Thames Water. (SP12) 75% of customers either strongly support or somewhat support Thames Water's plan to achieve this goal. (SP12)	**Insight Triangulation Key**	
		Robustness of evidence	High
		Divergence of view (by group)	Low
		Regional differences	Low

Topics

CI1. I want you to have a positive impact on the community / Transparency

Insight synthesis

Customers would like us to demonstrate transparency about the company's finances, including shareholder investment and profits, and how customers' money is spent.

They also wish to understand how their interests are protected by the regulator.

Some customers express concerns about the privately-owned, profit making and monopoly status of Thames Water. As a public service provider, they want to feel the company cares for its customers and is not only motivated by profit.

Stakeholders want us to take on a proactive social and environmental role.

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Ownership and profits	Some customers express concerns about the privately-owned, profit making and monopoly status of Thames Water. They want to feel the company cares for its customers and is not only motivated by profit. (PR19-5) Some customers have the impression from the media that water utilities are too large, out of control and don't take responsibility for their actions. There is evidence that older customers have more negative views about Thames Water than other groups. (PR24-3, PR24-2). 43% of customers think Thames Water only cares about profits, which is a considerable increase from 39% two years ago. (CX120) Only 26% of customers interviewed have a favorable view of Thames Water (CX104) More generally, CCW research found that profits and bonuses are not actually top of mind for consumers but contribute to disempowering and frustrating consumers within the context of all other issues. Consumers tend to feel like there is a lack of transparency and openness over how water companies as private businesses operate. (R41) Stakeholders are concerned with the regular turn over of leadership, particularly strong among NGOs. Some point to difficultly in creating lasting relationships with Thames Water's leadership team (S8, S7) Stakeholders highlighted how renumeration and profit-making in the utilities sector have garnered more attention amidst the cost-of-living crisis. The water industry in particular has faced increased criticism around executive pay considering the uptick in sewage incidents and leakages. Related negative stories are consistently and spontaneously mentioned by stakeholders. (S39) MPs highlighted concerns around profiteering considering the recent coverage around executive pay amidst continued local and network wide incidents and failures. (S39) Regardless of baseline affordability, customers want Thames Water to invest in business plans from its profits/dividends, rather than from only customer bills. (PR24-14)	Insight Sources v18: CX114 C-MeX CES and Brand Survey Q4 22-23 CX104 Thames Water perception & behaviour research, May 2023 S39 Stakeholder Reputation Research Report. March 2023 PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023 Insight Sources v17: R41 CCW Bridging the gap: Awareness and Understanding of Water Issues, November 2022 Insight Sources pre-v17: S14 Stakeholder Reputation Research, March 2022 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 PR24-3 PR24 Foundational Research – Social Media, November 2021 S7 Blueprint for Water Insights, July 2021 SP11 Smarter Water Catchment Survey, November 2021 Pre-2020 Insight Sources: PR19-26 CR66 Corporate and Financial Responsibility, BritainThinks (Jul 2018) PR19-5 CR20 Future Trends Outputs for planning , December 2017. S8 PR19 Summary of Stakeholder Engagement, April 2019
Open and honest (1/2)	Customers expect accountability and transparency from water companies and want companies to act honesty. (SP11, PR24-2). Customers would like us to demonstrate transparency about the company's finances, including shareholder investment and profits, and how customers' money is spent. They also wish to understand how their interests are protected by the regulator. (PR19-26) Stakeholders express a desire to hear even more proactive communication around future planning, including acknowledging existential threats and offering potential solutions. They have expressed concerns around a lack of clear future planning, and some suspect that due to privatised nature, Thames Water are less transparent about investments or priorities. As a result, stakeholders want Thames Water to be more forthcoming with information and planning. (S14)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Open and honest (2/2)	Going forward, MPs are particularly interested in Thames Water improving on these areas: Proactively sharing data and concrete proof points that showcase Thames Water's progress in local areas and across the network as a whole. (S39) Regulators again give the lowest reputational score among audiences but highlight some positive moves Taking the initiative to increase transparency by sharing data sets that allow real-time and in-depth access to operations. (S39) Stakeholders spontaneously note that Thames Water has been more transparent in terms of sharing data, openly acknowledging performance issues and discussing challenges within the sector in the past year. (S39) These stakeholders also report higher respect for Thames Water due to the challenging environment it operates within, and its transparency and openness in addressing legacy issues compared to other companies. (S39) Stakeholders and regulators indicated that the plan's impact on bills is important to understand, and regulators asked for Thames Water to demonstrate how the preferred plan is the best value for money, in the long term compared to other plans. Regulators also asked Thames Water to provide information about how future risk will be addressed through business-as-usual activities (base funding) or through enhancement funding. (SP20)	Insight Sources v18: CX104 Thames Water perception & behaviour research, May 2023 S39 Stakeholder Reputation Research Report. March 2023 SP20 DWMP Consultation Response – You Said We Did. February 2023 Insight Sources pre-v17: SP15 Thames Water Customer Voices Public Value Research, May 2022 S14 Stakeholder Reputation Research, March 2022 Pre-2020 Insight Sources: S7 Blueprint for Water Insights, July 2021 S8 PR19 Summary of Stakeholder Engagement, April 2019
Public role (1/2)	Customers believe it is Thames Water's role to deliver public value in all the areas. However, some of the community focused outcomes are deemed less important and customers are willing for Thames Water to limit the scope of public value if it impedes the delivery of core services and increases water bills. Some activities are deemed to benefit from Thames Water's input but are also the responsibility of other organisations. Many feel the commitment to these activities are commendable overall. (SP15) Stakeholders expect Thames Water to do more to inform customers about the importance of water and its scarcity to help motivate greater public focus on the need to use water wisely now and in the future. Customers support moving from treating customers as passive recipients of the service to active participants in the water cycle. (S8, S7, S14) Future bill payers are significantly more likely, compared with Dual + Wastewater customers, to have heard about none of the example Thames Water initiatives. (CX104) Appetite to hear more about Thames Water tends to be lower among future bill payers, with the exception of recieving information on what Thames Water is doing with regards to net zero carbon emissions and protecting/improving plant biodiversity. (CX104)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Public role (2/2)	Future bill payers less likely to agree with brand values related to direct customer interactions: such as Thames Water being friendly, helpful and easy to deal with, and that they inform of the good they are doing. (CX105) Future bill payers are significantly more likely, compared with Dual + Wastewater customers, to have heard about none of the example Thames Water initiatives. (CX105) Appetite to hear more about Thames Water tends to be lower among future bill payers, with the exception of receiving information on what Thames Water is doing with regards to net zero carbon emissions and protecting/improving plant biodiversity. (CX105)	**Insight Sources v18:** S39 Thames Water Stakeholder Research Report. March 2023
Trust and perceptions of Thames Water and the water sector (1/3)	Numerous scandals including the discharge of sewage into water sources and the awarding of bonuses are perceived to have shaken wider trust in the sector. (S39) Stakeholders rarely differentiate between the different water companies and scrutiny is – often but not always – applied more to the sector rather than individual actors. However, as the largest and one of the most recognisable water companies, Thames Water is often perceived to be the embodiment of the sector's ills. (S39) Stakeholders do not simply parrot back media headlines in their assessment of the water industry. They tend to know more details than the general public about complex issues such as storm overflows and the realistic capabilities of water companies to make change. (S39) There is a recognition that water companies will struggle with negative media attention, whether fairly or unfairly. For this reason, stakeholders tend to hold a more nuanced perspective about the industry's performance. (S39)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Trust and perceptions of Thames Water and the water sector (2/3)	stakeholders remain highly concerned about the issues facing the water industry and still have expectations for companies to progress. This is especially heightened due to a perceived lack of dialogue between water companies and the public. (S39) Most stakeholders are neutral towards Thames Water when it comes to both reputation and respect which is consistent with previous years. Negative media attention has had less impact on stakeholder's reputational assessment of Thames Water than the general public and respect generally relates to the personal respect stakeholders hold for Thames Water due to their operational challenge and the quality of their personnel. (S39) Stakeholders are positive towards Thames Water insofar as it delivers its day-to-day core service of providing clean water and managing wastewater to a high standard. It also plays an active role in communities through engagement and is seen to have increased its focus on targeting vulnerable customers. However, stakeholders struggle to award Thames Water with scores over 3 given the prolific failures to address water pollution, increasing leakage issues and a perceived negativity from the general public. Stakeholders are losing the benefit of the doubt they had in previous waves that Thames Water is investing in these areas, and are asking for tangible evidence. (S39) Going forward, MPs want Thames Water to prevent large scale flooding or sewage spill incidents that cause immense damage in local areas. (S39) There are clear areas where these stakeholders would like to see improvement Empirically, Thames Water is one of the lowest performers on many measures compared to other water companies and that has to change to improve its reputation. Thames Water should Shout about the good initiatives, even if they are hyper-localised, to help balance the overwhelmingly negative press coverage. (S39) Stakeholders across all groups are quick to recognise that Thames Water operates in uniquely challenging context with ageing Victorian infrastructure. However, stakeholders who represent customers are becoming increasingly unsympathetic as they continually contend with reoccurring leakage and flooding issues in local areas. (S39) Environmental concerns are top of mind for stakeholders with increased data and media coverage demonstrating it is a chronic issue for the industry - while not a unique challenge to Thames Water, there is a perception among most that the company is a relatively bad offender. (S39) Regulators/ Decision makers and NGOs attribute much of their positivity and trust in Thames Water to the quality and expertise of its staff. (S39)	Insight Sources v18: S39 Thames Water Stakeholder Research Report. March 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Trust and perceptions of Thames Water and the water sector (3/3)	Most stakeholders agree that Thames Water is headed in the right direction, however, across the audiences are critical of the pace of change. While many acknowledge regulatory and budget constraints, overall sympathy is waning. The reality of the size and age of the infrastructure is an immense challenge, but some stakeholders think Thames Water should have been tackling this years ago, and so are reticent to accept that as a reason for not acting effectively. Also, public scrutiny towards water companies is growing which increases the pressure on political and regulatory representatives. (S39) Stakeholders prioritise Thames Water getting the basics right first i.e. service areas; followed by helping those who need it, and improving experience and engagement with customers. Bringing social value to communities is important, but behind core service provision and finally, although an exciting prospect to stakeholders, green energy took lesser priority than immediate environmental concerns around water. (S39) Customers had different views of Thames Water, and these views varied according to the customer's typical persona. The following is a summary of customer's views of Thames Water, broken down by customer personas: 1) Service user: most of customers within this category have neutral/positive views towards Thames Water. Minority of these customers have experienced issues with service interruptions, new meters, pressure etc. 2) Bill payer: Most are positive about Thames Water, some customers not on a water meter feel as though their bills are disproportionately high. 3) Citizen: These customers want other customers to be supported at (e.g. i.e those who are in financial difficulty). They have mixed awareness of the PSR and other financial support schemes available to them. Those with good knowledge of financial support schemes are positive. 4) Society: These customers are concerned about the environment and are keen to see Thames Water's proposals. (PR24-14) Majority of customers have limited/no conscious service interaction with Thames Water and feel quite neutral towards Thames Water. There are three types of perspectives towards Thames Water based on customer experiences: • Positive: Customers that had a positive experience towards Thames Water, felt this for way for various reasons including: positive water meter installation, PSR support, bill payment support. • Customers with neutral feelings towards Thames Water, felt this way as they had no negative experiences for Thames Water, and have not had needed to contact them. • Customers with a negative perspective towards Thames Water, felt this way as they have had issues with their water services. (PR24-14)	**Insight Sources v18:** PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Engagement and relationship with customers and stakeholders (1/2)	NGO stakeholders continue to score Thames Water the most favourably among the different audiences. For NGOs who specialised in customer protection, this was due to the commitment and expertise of their counterparts at Thames Water, and willingness to collaborate and listen. (S39) NGOs in customer protection see areas for improvements in Close partnership and engagement is not felt across the board, and some NGOs want a better relationship with Thames Water. (S39) Environmental NGOs praise Thames Water specifically for Continued collaboration and commitment to supporting NGOs. However, they would like to see the following improvements: • Gain a better understanding how, as a large corporation, to partner with the charitable sector more effectively. Some report feeling that their communications and requests are too burdensome • Many would appreciate greater responsiveness, and clarity around timescales when it comes to nature projects • Often describe Thames Water as a "black box" where requests disappear and are not responded too. (S39) There has been a slight increase in Local Government Authorities' reputational assessment of Thames Water, which is predicated on Improved engagement and collaboration with councils, including more regular meetings; a better understanding of Thames Water's strategic thinking and plans for future development; and reliable service provision, where access to water and removal of wastewater is usually not a concern. (S39) LGAs want to see improvements in responsiveness to queries, the one contact assigned for all councils is perceived to be overstretched; leakages and flooding are frustrating when they occur, and councillors want to see investment in the network to prevent repeat incidents; and improving dialogue with the general public, especially around water scarcity and drought warnings. (S39) The negative trend around MP's reputational assessment of Thames Water has continued, mainly fueled by the increased number of severe pollution and leakage incidents negatively impacting their constituents and local areas; Sporadic levels of engagement from Thames Water both in terms of frequency and whether it is proactive or reactive; and A sense that larger issue areas that MPs champion and constituents focus on are not being factored well enough into Thames Water's long-term strategies. (S39) Regulators think Thames Water should improve prioritisation processes when it comes to investment then clearly support those decisions with data. (S39) Regulators indicated that Thames Water should provide clarity on the likelihood of delivering partnership schemes in the future and the potential scale of co-funded delivery. (SP20)	Insight Sources v18: S39 Thames Water Stakeholder Research Report. March 2023 SP20 DWMP Consultation Response – You said we did. February 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Transparency

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Engagement and relationship with customers and stakeholders (2/2)	Going forward, MPs are particularly interested in Thames Water improving on these areas: Building direct, two-way communication channels with the public that help to ease any concerns around water supply. (S39) Regulators again give the lowest reputational score among audiences but highlight some positive moves day-to-day relations with Thames Water: staff are broadly lauded for the professionalism and openness, there is recognition that staff and leadership are working hard; and providing clarity with regulators around strategy and areas of focus, particularly when it comes to short term versus long term. (S39) Among all audiences there is growing concern about the lack of dialogue and understanding between Thames Water and the wider public. Thames Water has a sense of passivity regarding customer engagement, and could be doing more in terms of outreach i.e. educating on saving water and cutting costs. (S39) Among all audiences, having regular and timely catch-ups made a huge difference in positive perceptions. They suggest not limiting communications to just incident response or emails. (S39) The majority of customers also support Thames Water's proposed partnership working approach as part of the DWMP, which seeks to work with 200+ local authorities, organisations, action groups, catchment partnerships and national stakeholders. (SP20) Stakeholders provided feedback towards the solutions and delivery plan proposed in the dDWMP, and indicated that there should be more references to citizen science as a wider societal benefit in the Plan. The Outfall Safari programme has proven that local communities are willing to engage with their river environment and this will be key for large scale monitoring. (SP20) Stakeholders provided feedback regarding partnership working: - Improve integration across all Risk Management Authorities (RMAs) so opportunities for partnership working could be identified with greater ease. - Provision of a greater number of mutual objectives to make working in partnership easier. - Thames Water could approach stakeholders as a partnership lead, rather than stakeholders approaching Thames Water for funding. Stakeholders also expressed interest in a 2-stage funding process, where stakeholders received financial support in developing their initial proposal to put forward to Thames Water. - Stakeholders indicated that they have limited capacity and resources to support a significant amount of partnership schemes (i.e., SuDS) alongside statutory responsibilities. (SP20)	**Insight Sources v18:** S39 Thames Water Stakeholder Research Report. March 2023 SP20 DWMP Consultation Response – You said we did. February 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Topics

CI1. I want you to have a positive impact on the community / Biodiversity

Insight synthesis

Natural spaces are important to the public and they enjoy a wide range of recreational activities in nature.

Customers feel that the natural environment improves quality of life and would like to see more access to sites for recreation if local to them.

Customers have a low awareness of Thames Water's role in providing access to recreation, but those that already use these spaces are more familiar with our role.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Biodiversity	Middle	Becomes important as a proxy for environmental policy but ill understood.

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

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

CI1. I want you to have a positive impact on the community / Biodiversity

Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Providing access to our sites for recreation	Customers say the natural environment is important to them – and river environments are a key part of this. They improve quality of life and access is valued for providing places to relax, exercise and spend time with family. Customers would like to see more access to local sites for recreation purposes. However, few customers currently associate Thames Water with providing access to recreation sites. Customers are eager to hear more about Thames Water's role in this space. (SP9, SP11, CX120) Customers engage in a range of activities at rivers and waterways with walking as the most frequent, following by enjoying the local culture, meeting family/friends, running, cycling and attending community events. (SP11) Nearly 60% of household customers go walking, running, etc. at least six times a year. These tend to be the most popular outdoor activities, followed by picnicking- over half have a picnic at least once a year. Activities directly involving the water such as swimming, fishing and other water sport activities are less popular, but still important activities for customers. More specifically, the proportions of those who regularly go camping, sailing, fishing etc. are considerably smaller. Hence, initiatives such as 'Campsite', 'Water sports facilities' and 'Fish ponds' are likely to appeal to a small fraction of the customer base, although it is possible that improved availability of such facilities could boost engagement in these outdoor recreation activities. (SP11, SP18) People who use recreational sites are significantly more likely to know about Thames Water's improving water quality, river restoration and flooding solutions; further information and marketing could help improve this among non-users. (SP11)	Insight Sources v18: CX120 C-MeX CES and Brand Survey Q1 23-24, August 2023 Insight Source v17 SP18 Water Club - Strategic Resource Options - Added value research, November 2022 Insight Sources pre-v17: SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021 SP11 Smarter Water Catchment Survey, November 2021

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

CI1. I want you to have a positive impact on the community / Biodiversity

Stakeholder views | Detailed Insights | Vision 2050

Sub-topic	Detailed Insights
Attitudes towards improving biodiversity	Thames Water customers care about biodiversity and expect the company to take action to preserve it. Customers are generally impressed by the information about Thames Water's current biodiversity strategy and support remains high, even when presented in the context of a potential bill increase. (PR19-3) Learning about Thames Water's biodiversity plans generally makes customers more positive about the organisation. (CX89, PR24-2) Customers think of the natural environment in terms of wildlife and plants as well as different landscapes including woodland, rivers, countryside and the coast. They think of the river environment not just the river itself but the area around it as well. (PR24-2, SP11) Customers think the natural environment is very important, both at an individual level as well as for society more widely. They think it is an important factor in improving quality of life and feeling relaxed and contented. (SP9) NGO stakeholders with interest in environmental matters praise Thames Water specifically for the specialist knowledge of Thames Water's ecological teams. (S39)
Vision 2050: *Use the land Thames Water owns to benefit wildlife and create natural spaces for people to visit (Ranked 16th / 19 Vision 2050 goals tested with customers)*	Customers show mixed levels of interest in this area. Although some are keen for more wild spaces to improve local areas and provide safe spaces for families, others feel it has a lower priority and, given the utility bills crisis, wouldn't be the right area to invest in currently. (SP12) Despite mixed levels of interest/importance, customers tend to think the goal itself is admirable, in particular the benefit to wildlife and local communities/families. For many, this is a 'nice-to-have', and something they can passively support. (SP12) 91% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Although previously customers felt this was a lower priority, the lack of specific details and 'long' timeframe means many of them feel it is 'too slow'. Most expect this to progress constantly in the 'background'. (SP12)

Key Sources

Insight Sources v18:
S39 Thames Water Stakeholder Research Report, March 2023

Insight Sources v17:
CX89 Brand Survey Insights Q2 2022-2023, September 2022

Insight Sources pre-v17:
SP12 Vision 2050 Research, May 2022
PR24-2 PR24 Foundational Research - Customer Voices, November 2021
SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021
SP11 Smarter Water Catchment Survey, November 2021

Pre-2020 Insight Sources:
PR19-3 CR12d Biodiversity online community task, December 2018

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

4.2 For the Environment – Detailed insights

Summary of Insights – For the Environment

Wants

*Summary of relevant performance commitment provided (PR24-14)

The 'for the Environment' pillar is broken down into 3 Wants and 6 sub-topics

Wants	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
Topics	Water resources	Water demand management	Sustainable abstraction	Leakage	River health*	Net zero carbon
Sub-topics	• Impact of climate change • Source changes • Water recycling • Other water resource options • Long-term supply	• Education and campaigns • Behavioural change • Metering • Views and attitudes of vulnerable customers towards water usage • Tariffs	• Reducing abstraction • Future supply options	• Leakage levels • Prioritisation of leakage reduction over new sources of supply	• Pollution incidents • Improving river quality	• Renewable energy transition and use • Approach to decarbonisation
Enhancement cases	• Develop new water resources	• Demand management (metering & water efficiency)	• Reducing abstraction from vulnerable sources		• Reducing sewage spills to rivers and improving river health • Infiltration	• Industrial Emissions Directive

***ENV1 cuts across the other three wants within 'For the Environment*

Topics

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

Insight synthesis

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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Severe drought	Lower	Potential for significant personal impact, however, seemed very unlikely to happen.
Hose pipe ban	Lower	Little effect on people and a reasonable expectation during periods of drought. Water levels in the UK perceived to be high.
Non-essential use ban for businesses	Lower	Does not impact day-to-day business function, therefore, non-essential use ban deemed non-essential

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Key evidence sources*

PR24 foundational research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 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.

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

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Impact of climate change	The majority of consumers think that the amount of water available in the environment and the amount they pay for water will decrease and increase, respectively, due to climate change. (R13) Customers tell us that they expect investment into long term and cost-effective solutions to deal with challenges such as increasing population and climate change. (PR19-19) Customers expect us to plan for future hazards including weather related events, terrorism and cyber-crime. They expect us to plan for a service that is resilient to these hazards and trust in our expertise to do this. (PR19-19) Customers feel flooding is likely to occur more often due to climate change and as a result, are less likely to tolerate disruption to services from flooding. They believe Thames is currently not doing enough and want contingency plans in place. (SP5) Customers are generally supportive of the Thames Tideway Tunnel, when the reasons for it are explained. This is indicative of support for protecting against weather related hazards. (PR19-59) Stakeholders encourage Thames Water to ensure that their plans can cope with a range of conditions/scenarios, such as flooding and freeze-thaw. Stakeholders want to see Thames Water tackling climate change in our next business plan. (S8) Stakeholders want more clarity on how the water industry plans to address the impacts of climate change, population growth and rising costs of living and pointed out water is a precious resource which needs to be protected. (S14, S19) It is widely accepted by stakeholders that climate change will have serious implications for the long-term sustainability of the water and sewerage sectors. There is concern that there is no unified industry plan to mitigate these effects. (S39) Stakeholders largely agree that communications around the hosepipe ban and water scarcity were handled poorly, and they were often obligated to rectify the lack of explanation or support provided to affected customers. (S39)	Insight Sources v18: S39 Thames Stakeholder Research Report. May 2023 Insight Sources pre-v17: S14 Stakeholder Reputation Research, March 2022 S19 Research Summary Form – Insurance stakeholders, May 2022 SP14 WRSE Water resources quantitative research, June 2022 R13 CCW WaterVoice Window 4 Summary Report , June 2020 SP5 Water Supply System Resilience Programme - Customer Research (Qualitative Findings), Dec 20 Pre-2020 Insight Sources: PR19-19 CR52 Resilience Deep Dive, February 2017 PR19-59 CR03 TTT customer understanding, Populus, March 2018 S8 PR19 Summary of Stakeholder Engagement, April 2019
Source changes	When prompted, customers assess water source options by balancing efficacy (including reliability) and the cost and time commitments associated with the change. There is also an expectation of water companies to evaluate options through this lens. (SP14) Customers say they are unlikely to engage with communications on source change, and taste tests indicate that most are not able to detect differences at the level that might be expected in a source change. However there is still a need to communicate to explain the rationale for the change, alleviate taste concerns and provide clear guidance on impact. (SP14) Quantitatively environmental and human framings are slightly preferred to practical framings of a water source change, however in qualitative sessions environmental framing is felt to lack impact indicating that overall human is best. (SP14) Customers want to be notified in advance of a source change, preferably by e-mail or a letter separate from the water bill. (SP14)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Water recycling	Learning that London's water supply could run out is new news to many customers. Many already feel they do their bit to conserve water, such as collect rain to water the garden, reuse grey water and have shorter showers/fewer baths. (CX68) Those who were not already conserving water say that communication from Thames Water, such as the letter as tested, would encourage them to think more carefully at how they use water at home. (CX68) Customers generally feel positive about Thames Water for planning ahead to assure that they do not lose their water supply during dry periods. Many feel positive towards Thames Water for future proofing the water supply by using different methods such as water recycling. Customers generally have a low awareness of the concept of water recycling. When given information, although not all like the idea, they appreciate that it is better than losing their water supply altogether. (CX68) As the concept is not fully understood and should the system be implemented now, they would have a lot of questions. On promoting water recycling, customers suggested emails are their preferred method of communication however customers admitted they were more likely to discard the email without reading compared to other channels. Customers feel text messages and social media is the best way to spread initial awareness. (CX68) Customers are concerned initially around the source of recycled water, however, when informed about the process, their concerns shift towards associated carbon emissions and energy intensity. (SP14) Unpredictable rainfall is a challenge, reducing the efficiency of rainwater harvesting systems and the challenge of ongoing maintenance of greywater systems, plus the space requirements related to dual plumbing – a problem due to more space being lost already to things associated to fire regulations. (S41)	Insight Sources v18: S41 Research Summary Form – Developer Services – Berkeley Group, May 2023 Insight Sources pre-v17: CX68 Water Recycling Communications: Qualitative findings, June 2022 SP14 WRSE Water resources quantitative research, June 2022
Other water source options (1/2)	Desalination is a less well-known and understood source compared to others. Although praised for its reliability, Desalination is ultimately judged to only be suitable in emergency scenarios given the 'intense' construction and running process. (SP14) Concerns about Water Transfer stem from comprehension issues and worries about quality and the environmental impact, however, generally customers are favourable towards it as a source option, seeing it as a logical solution to regional water scarcity - customers do not generally have high comprehension of water transfer schemes and so do not express strong preferences for pipe or canal-based schemes. (SP14) Reservoirs benefit from their familiarity in the UK, with attitudes being generally favourable to them. However, customers do raise concerns in terms of costs, lead times and the impact of construction. (SP14)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Other water source options (2/2)	Customers think it is necessary for Thames Water to invest in new resources. There is little opposition to the new river abstraction at Teddington or the new reservoir in the Upper Thames catchment. Both are thought to offer an environmentally friendly solution that is good value for money. There is more opposition to the Severn Thames Transfer due to the scale and complexity of the project, as well as the perception that the scheme may shift the pressures on water resources elsewhere. (SP21) Regarding securing new water sources, participants feel more comfortable supporting bill increases for initiatives that are thought to be low risk to the environment and have a stronger likelihood of success. For this reason, the plan for a new reservoir is the preferred of the three investment plans as the concept is understood and reservoirs are regarded as positive natural spaces that have many environmental benefits. (SP21) There is an overall positive response to the plan and general agreement that taking action to secure a reliable water supply for the future is needed. Although there is a general consensus, that there was a difference of priority by age group. Younger respondents were more likely to mention the environment and climate change whereas older respondents were more concerned with infrastructure (i.e. sewage and leaks). (SP21) The overall preference is for a balanced regional plan. The three most-preferred plan profiles for both households and non-households in London and Outside London featured a mix of strategic resource schemes (incl. SESRO), "local schemes" (Teddington water recycling), and higher levels of demand management ambition. (SP22) A greater weight of customer preference was for self-sufficiency within the WRSE region. Large-scale transfers from outside of the region were not viewed as the primary solution but rather part of the mix needed. The level of support observed for the Gov C plan also suggests that a sizeable proportion of customers preferred demand reduction over reliance on large-scale transfers as the basis of "balanced" regional plan to secure water supplies. (SP22) Customers' preferences did vary between London and Outside London but in line with the profile of the alternative plans. The greatest level of support for the Gov C plan with a low bill impact was observed from respondents Outside London. The Best Value plan (with a low bill impact) stood out as having the strongest level of preference from respondents in London. In both cases, the support observed for these plans corresponds with the strategic resource option that would see water moved from Outside London to London. (SP22)	Insight Sources v18: SP21 Thames Water WRMP Consultation. May 2023 CX104 Thames Water perception & behaviour research, May 2023 SP22 WRSE Customer Research Regional Plan Preferences – Thames Water Summary Report, August 2023 Insight Sources v17: SP19 WRSE Best Value Criteria, May 2021 CX86 Research Summary Form,: Developer Scrutiny Panel, September 2022 Insight Sources pre-v17: SP1 WRSE - Drought Communication Research – Quant, Jun 21 SP4 WRSE – Customer Preferences to Inform Long-Term Water Resource Planning, March 2021 Pre-2020 Insight Sources: PR19-61 CR69 Drought Resilience & Chalk Streams, BritainThinks, March 2019

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Long-term supply	Whilst the majority agree there is a current threat to the supply of usable water to their homes (CX104), most customers are unaware of the challenges to ensuring future water supplies and that demand is projected to exceed supply. When they are informed, customers want plans to ensure sufficient supply to meet future demand. (PR19-61) 38% of customers are concerned about water shortages now and 67% are concerned about water shortages in the future. Some customers feel Thames Water's track record is poor here and so view they promises with scepticism. Customers want timescales to show how we are making meaningful progress, and don't want us to hide behind ambiguity. (SP1) Customers' overall view is that water companies should not plan to harm the environment. They deem it unacceptable that long term plans to secure water supplies and improve the resilience of the water system to drought and unexpected events would be at the expense of the environment. (PR19-61) Customers prefer supply options that have a net positive environmental impact and deliver wider public value, for example recreation. Use of chemicals, high energy use, and other environmental impacts are key reasons why customers favour some options less. Wherever possible, the resource plans should adopt options that contribute to the recovery of nature (e.g. supporting Local Nature Recovery Strategies). (SP4) Customers' top priority is foremost to ensure the long-term security of supply in the region, both for public supply purposes and other sectors. Ranking just below this are the key considerations for improving the efficiency of the water supply system in terms of reducing leakage and reducing its dependency on sensitive habitats and groundwater sources, along with the cost and customer affordability constraints for the plan. (SP19) Developers feel that water resilience is a problem in London and highlighted data centres as an emerging issue. Questions were raised as to why the emergence of a few data centres could cause such a serious supply issue/constraint. Stakeholders noted the implications from a water demand perspective as well as energy. (CX86) Stakeholders have expressed concerns around water scarcity after the hosepipe ban in summer 2022 have grown, exacerbated by reports of water lost from leakage incidents. There are now questions about whether the water supply is being managed in a responsible, sustainable way. Related negative stories are consistently and spontaneously mentioned by stakeholders. (S39) With demand for new housing and increasing bouts of extreme weather, stakeholders want proactive solutions to these issues before it's cataclysmic. (S39) Customers were largely in favour of Thames Water's Water Resource Management Plan, and believe that action needs to be taken to ensure that a secure water supply is retained. Stakeholders did not question the risks presented to the water supply, and stakeholders felt trust towards Thames Water and the work carried out to create the plan. (SP21) Although customers supported the Water Resource Management Plan, the majority did not support having to contribute financially, due to the cost of living or concerns that Thames Water were paying large bonuses to employees and shareholders. In general, customers felt that putting the burden of cost on the customers is seen as unfair. (SP21) Customers feel that the financial burden should be carried by Thames Water (through reported profits and reducing pay-outs to shareholders) and by the Government. Although customers understand that Thames Water is not government funded, they feel that Government and local authorities are responsible for the environment and therefore should financially support environmental initiatives. (SP21)	Insight Sources v18: S39 Thames Water Stakeholder Research Report, May 2023 SP21 Thames Water WRMP Consultation. May 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Ensure there is enough water in the future, without taking too much from rivers and harming the environment (Ranked 2nd / 19 Vision 2050 goals tested with customers)*	This goal resonates strongly primarily because of the value customers place on water, both for themselves and society at large. Customers accept the realities of climate change and want to avoid a future of reduced living standards due to less water supply. Customers also greatly value not damaging the environment in the process and so believe this is one of the most important issues raised. (SP12) Customers think Thames Water's overall goal (to '*Ensure there is enough water in the future, without taking too much from rivers and harming the environment*') is not only commendable but essential to the future of both customers' wellbeing and the environment. A sizeable minority believe that action should be taken more urgently or provide customers with assurance that Thames Water will not cause significant damage to waterways during this process of balancing water supply vs. environmental needs. (SP12) 94% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Customers applaud Thames Water's commitment to ensuring that enough water will reach customers in an environmentally sustainable way. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research. May 2022

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Enhancement case / WRMP (Develop new water resources)

Enhancement Insights

	I want you to ensure there is enough water now and in the future
Key activities	• Development of Teddington Direct River Abstraction (DRA) scheme, Severn to Thames Transfer, South East Strategic Resource Option (SESRO)
What customers get by 2030	• Resilience to 1:200-year drought, on track toward resilience to 1:500-year drought by 2040

Relative priority of enhancement area: 4th/13

Key Sources:
SP19 WRSE Best Value Criteria
CX86 Research Summary Form
SP12 Vision 2050 (Ensure there is enough water for customers without taking too much from rivers and harming the environment)
SP1 (WRSE - Drought Communication Research - Quant)
PR19-61 CR69 Drought Resilience & Chalk Streams, BritainThinks
PR19-58 CR29a WRMP stage 1, BritainThinks
PR24-14 Acceptability and Affordability Testing (Qualitative findings)

Engagement supporting the need

- Most customers are unaware of the challenges to ensuring future water supplies and that demand is projected to exceed supply. When they are informed, customers want plans to ensure sufficient supply to meet future demand. (PR19-61)
- 38% of customers are concerned about water shortages now and 67% are concerned about water shortages in the future. Some customers feel Thames Water's track record is poor here and so view they promises with scepticism. Customers want timescales to show how we are making meaningful progress, and don't want us to hide behind ambiguity. (SP1)
- Customers' overall view is that water companies should not plan to harm the environment. They deem it unacceptable that long term plans to secure water supplies and improve the resilience of the water system to drought and unexpected events would be at the expense of the environment. (PR19-61)
- Customers prefer supply options that have a net positive environmental impact and deliver wider public value, for example recreation. Use of chemicals, high energy use, and other environmental impacts are key reasons why customers favour some options less. Wherever possible, the resource plans should adopt options that contribute to the recovery of nature (e.g. supporting Local Nature Recovery Strategies). (PR19-58)
- Customers' top priority is foremost to ensure the long-term security of supply in the region, both for public supply purposes and other sectors. Ranking just below this are the key considerations for improving the efficiency of the water supply system in terms of reducing leakage and reducing its dependency on sensitive habitats and groundwater sources, along with the cost and customer affordability constraints for the plan. (SP19)
- Customers value the benefits that are brought through the WRMP. Two of our customers' highest priorities are that we provide a constant supply of water, and that we ensure that our supplies are resilient into the future (PR24-12, SP19). In addition, our customers want us to be environmentally responsible, reducing abstraction from sources in vulnerable catchments where we have evidence that this will result in environmental benefit. (PR24-7)

Engagement supporting the solutions

- There is high support for this enhancement (water resources management), driven by fears over water security, population growth and the impacts of climate change. (PR24-14)
- Customers are generally comfortable with the costs and feel this offers good value for money. (PR24-14)
- From existing research, customer views on sources of water - water transfers (including reservoirs) included a preference for a simple process that mainly uses existing infrastructure. This is seen as a logical solution to water shortage, making the most of existing supply and seen to have limited environmental impacts. Relies on other companies, so less reliable. Some health concerns about use of pipes for transfers vs. canals, and about of 'exporting' problems to other areas. (SP3)

Topics

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

Insight synthesis

Customers want us to be more ‘self-reliant’ around water supply in the Thames 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.

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

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

Water demand management

Sub-topic	Detailed Insights	Key Sources
Education and campaigns	Customers are supportive of education through schools to promote awareness and understanding of water efficiency. Some customers feel they are already water efficient and could not use less, but overall customers support education, information, advice, advertising and 'freebies' to help customers understand the need and reduce their water consumption. (PR19-2) Consumers may be engaged better by a coherent set of messages that raises their awareness of the 'bigger picture' about water resources, rather than just suggesting ways they can save water. Where campaigns have taken place, customers' awareness and understanding of the issue and their use of water saving devices has increased and water consumption has decreased. (SP1) For wider marketing activity, including informing and educating about leakage prevention and water efficiency programmes, it was discussed whether it might be beneficial to engage more actively with local channels and media, such as local parish magazines, in addition to more broadly based channels. Customers want an effortless way of reporting any leaks that they spot and want to know if we are already aware of it. They expect relevant and timely information and commitment to the time given to fixing it. (CX45) TV and video adverts tended to have higher recall amongst customers and were more effective as they contained visual aids for how to become more energy efficient. Those who had recalled water efficiency ads were generally more concerned around water usage and most customers said they had changed their behaviour to some extent e.g. reducing time in shower, washing a full load. (CX87)	Insight Sources v17: CX87 Water efficiency campaign evaluation, August 2022 Insight Sources pre-v17: CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020 SP1 WRSE - Drought Communication Research – Quant, June 2021 Pre-2020 Insight Sources: PR19-2 CR07 PR19 Deliberative Research, BritainThinks, March 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Stakeholder views | Detailed Insights | Segmented Insights

<table>
<tr><th>Sub-topic</th><th>Detailed Insights</th><th>Key Sources</th></tr>
<tr><td>Behavioural change (1/2)</td><td>
76% of customers agree they would be wiling to change their habits to reduce their water usage and 55% of customers said they would like their water company to tell them more about how they can reduce their water use. (SP1)

Customers have mixed views over further reducing their consumption; some already feel they 'do their bit' and others think it unfair to ask this of customers when leakage levels and salaries/profits are so high (PR24-12). They recognise that a mix of demand and supply-side solutions are required, however, there is a general desire to see water companies implement demand-side options first, including fixing leaks and educating customers (SP14)

Only 39% of customers agreed that they were careful about how much water they use because they don't want to waste water, exhibiting habits such as turning the tap off when brushing their teeth and using a washing up bowl. It was revealed that younger customers (aged 18-24), customers from urban areas, and customers from BAME backgrounds are most likely to admit they take water for granted (SP1, R14, SP14)

Customers also have low awareness of water scarcity, and whilst all take steps not to 'waste' water, most are not actively trying to reduce their water consumption. Information on the topic is easily understood, however, this is not always enough in to unseat long-standing perceptions that water is abundant in the UK. (SP14)

Younger customers were more likely to say their water usage had increased over the past few months, whereas older customers were more likely to take part in everyday activities that contribute to a reduced water consumption. (CX87)

Household water use is a primary cause for concern for a large range of industry stakeholders; water companies & retailers, regulators/government, consumer representatives, business trader bodies, and NGOs. 98.2% of participants in the Waterwise Water Efficiency Strategy Consultation thought that increased water efficiency is a legitimate response to the threat of water scarcity and 96.3% of participants thought that Thames Water is not doing enough at the moment to mitigate the threat of water scarcity. (S3)

Household water usage is complex and individuals' behaviours are inconsistent. There also appears to be a weak link between self-reported environmental friendliness and water efficiency and kitchen sink water usage is only weakly correlated with household size, dishwasher access, the presence of a water meter or use of a washing up bowl. (R37)

There are potentially large differences between self-reported and actual water usage e.g. difficulties quantifying water usage, high frequency of daily water-using activities, less oversight of the water usage of other members of the household, and some even in denial about irresponsible/wasteful behaviours. (R37)

Water efficiency is rarely considered when consumers think about climate change – indeed, most are unaware of the link between water usage and the environment. As a result, consumers often see no need to use less water: there is very limited understanding that water is scarce in some areas of the UK, and little knowledge of the other environmental effects of water use. (R37)
</td><td>
Insight Sources v17:
CX87 Water efficiency campaign evaluation, August 2022
PR24-12 PR24 Enhancement Package Options research , September 2022
R37 CCW Sink Sense: Kitchen sink habits caught on camera, June 2021

Insight Sources pre-v17:
R14 CCW + Ofwat Customer Spotlight Report – Peoples' views and experiences of water, April 2022
SP14 WRSE Water resources quantitative research, June 2022
CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020
S3 Water Efficiency Strategy Consultation, July 2021
SP1 WRSE - Drought Communication Research – Quant, June 2021
</td></tr>
</table>

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Detailed Insights

Segmented Insights

<table>
<tr><th>Sub-topic</th><th>Detailed Insights</th><th>Key Sources</th></tr>
<tr><td rowspan="4">Behavioural change (2/2)</td><td rowspan="4">Majority of respondents agree that there is a necessity to restrict the amount of water used, in the UK, in a domestic context for washing, cleaning, drinking, cooking. However, people's perceptions of personal consumption are abstract. Customers understand the need to limit water in a very abstract way. They do so only because they feel it is the ‘right’ thing to do, rather than for specific practical reason. (CX104)

Majority of respondents agree there is a necessity and indicated that they will try and restrict the amount of water they use for washing, cleaning, cooking and any other domestic use. (CX104)

The main barriers to reducing water consumption are lack of financial incentive, lack of awareness (why) lack of knowledge of water use, and water companies themselves (reference made to high levels of leakage) (CX104)

All participants would like to see more done to make the best use of existing water sources. They would like to do their bit by reducing their own consumption. (SP21)

There are a range of future bill payers who were service users not bill payers:(students; young working adults; living at home; sharing flats/houses; contributing to bills). There are various challenges with future bill payers, mainly that they are distant from Thames Water and are unconscious of how much water they use. Engaging these customers to understand their future needs is considered to be difficult. (PR24-14)

Developers were positive about the new water device labelling scheme for water efficiency being introduced in 2025. Focus has been on energy rather than water use recently. But the incoming water label process will enhance understanding of water efficiency. (S40, S41)

They were also interested in the concept of water neutrality as this was already impacting them in already water-stressed areas of the UK i.e. the south-east. (S41)

Developers were surprised about the low uptake of water efficiency incentives to date. (S41)

Customers recognise the need to reduce demand and see this as an integral part of the regional plan, but this must be supported by Government intervention. A consistent finding across all aspects of the analysis of customer preferences was the low level of preference for the Gov H plan and absence of added Government-led intervention for demand reduction. There was a comparable level of support for the highest level of demand management ambition through the Gov C plan at lower bill impact levels. Moreover, the higher level of support for Least Cost and Best Value plans can be attributed in part to the inclusion and sooner introduction of water efficiency and product standards to support targets to reduce per capita consumption. Further, 88% of household respondents thought that Government introducing new legislation to promote the efficient use of water (water efficiency labels, standards for new homes) must or should be in place for them to find it acceptable to reduce their water use. (SP22)</td><td>Insight Sources v18:
CX104 Thames Water perception & behaviour research, May 2023
SP21 Thames Water WRMP Consultation. May 2023
SP22 WRSE Customer Research Regional Plan Preferences – Thames Water Summary Report, August 2023
PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023
S40 Research Summary Form – Developer Services – Berkely Group, May 2023
S41 Research Summary Form – Developer Services – Home Builders Federation, May 2023</td></tr>
<tr><td>Insight Triangulation Key
Robustness of evidence: High</td></tr>
<tr><td>Divergence of view (by group): Med</td></tr>
<tr><td>Regional differences: Med</td></tr>
</table>

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

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Metering	Customers broadly accept that extending metering is an essential part of reducing water use in our region. Customers support a roll-out of our metering programme, although they would prefer to choose rather than it being compulsory. Metering makes customers more aware of their water use. Most agree that metering is fair and expect that it will save them money. (PR19-45) However, customers in areas where we are starting to install smart meters are not clearly understanding the benefits to them and this is impacting motivation to make or keep appointments for meter installation. Customers want to be reassured that their bill is accurately based on what they used because they submitted a reading (PR19-60, CX56) Customers express concerns around the meter reading process, such as not knowing where it is located or it being difficult to access and a lack of awareness around billing frequency and estimates by Thames Water (CX56) Regarding non-household customers, all retailers and third parties saw smart water meters as a natural progression for water metering moving forward. A belief that smart meters would mean improved accuracy and reliability of bills was central to positive perceptions. For a number of retailers, smart meters are also regarded as an important step to achieving better water efficiency across the UK by allowing for more accurate meter reading and monitoring. Additionally, an emerging trend shows that non-household customers have increasing needs for water data to inform their environment/sustainability reporting. (CX42) Having invested in technology they feel could improve water efficiency (e.g. coffee machines), non-household customers compare their water consumption data with other organisations of their size and set benchmarks for employees to work towards. Metering helps non-household customers with their water efficiency, but also in their efforts towards sustainability and predictability of bills. (CX42) Developers want to see as many properties being metered as possible so people pay for what they use. (CX86) Retailers want to see a commitment to adopting smart meters, supported by a clear timeframe for delivery. They see data as integral to the 'water transition' i.e. enabling water efficiency and managing water sustainably. (S27) Both meter read data as well as meter asset data (location, age, etc) are both important to retailers. (S27) Smart Metering programme now being rolled out. Stakeholders understand reasoning but concerns during cost of living crisis (S38)	Insight Sources v18: S38 Elected representative issues tracker. May 2023 Insight Sources v17: CX86 Research Summary Form: Developer Scrutiny Panel, September 2022 S27 Research Summary Form: Retailer engagement, July 2022 Insight Sources pre-v17: CX56 User Experience – Submit Meter Reading, September 2021 CX42 non-household smart meters and data research, July 2021 Pre-2020 Insight Sources: PR19-45 EX13 Water Saving, Oct 2017 PR19-60 CX34 Enfield Metering, Populus, July 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Views and attitudes of vulnerable customers towards water usage (1/2)	**Cultural and religious factors** There was a sense that we take water for granted in this country. Some participants said they never think about water, and did not limit their usage or consider its impacts. This was more prevalent amongst participants from a White British background (though some participants from minority ethnic backgrounds reported that their children also had this attitude). (CX113) Participants with experiences of growing up in other countries (or visiting family there) had different attitudes. Some talked about the scarcity of clean, accessible water in their (or their parents') home countries. They talked of water as a 'luxury' and a 'precious resource'. Many of those who had experience of living in countries where water was scarce had retained habits of water conservation. For the most part, though, participants felt able to use water more freely here than elsewhere. (CX113) Religion affected both attitudes towards water and how it was used. Many Muslim participants (of Pakistani, Bangladeshi, Somali and some Nigerian backgrounds) emphasised that water is sacred in Islam, and they take care not to waste water. Water is also woven into the fabric of daily religious rituals: Muslims must perform 'wudu' (ritualistic purification with water) prior to their prayers (up to five times daily), and wash with water after using the toilet. (CX113) Some participants from Eritrea also talked about the blessing of water in the Christian Orthodox church. They would take their own water to church for blessing, and believed it had health benefits and brought them comfort. (CX113) There was also a minority view that water was 'God-given' – it fell from the sky as a gift from God, and therefore should be free to access. (CX113) **Factors relating to disabilities and medical conditions** Participants with disabilities and health conditions (including mental health conditions) talked about the ways in which their water use is affected by their conditions: • man with visual impairment washes his hands for longer and more often, because he cannot see whether his hands are clean. He spends longer in the shower for the same reason and he also cannot track his usage because he cannot read his water meter. • man with Crohn's disease explained he needs to use the toilet more often, and to shower afterwards • woman with Multiple Sclerosis (MS) said incontinence can be an issue, meaning more washing • woman with Obsessional Compulsive Disorder described how she gave her flat a deep clean every day, using a lot of water in the process (CX113) Many participants said that they were conscious of trying not to use too much water, and talked about water-saving measures such as water butts; not leaving the tap running while brushing teeth or washing up; swapping baths for showers; and using shower timers. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Views and attitudes of vulnerable customers towards water usage (2/2)	For some, these habits were driven primarily by a broad environmental concerns. Several felt their awareness had grown in recent years, partly due to water-saving messages, and partly due to seeing the effects of climate change such as flooding and droughts. (CX113) Many talked about reducing their water use to save on costs. Notably, even some participants whose use was not metered were anxious about trying to reduce their usage in a bid to save costs. This was perhaps part of a broader pattern of behaviour to cut back across the board (on added extras, socialising, travel, heating, and electricity use). It was also apparent that some were worried about their use of hot water because of the impact on the gas/ electricity bills. (CX113) For some, however, cost anxiety was so acute that they were resorting to more extreme measures to reduce their water/ hot water usage. Examples include: • Turning off the shower between soaping and rinsing; • No longer showering at home – using showers at leisure centre instead; • Showering/ bathing children once a week, down from 3-4 times a week; • Stopping gardening; • Having bucket baths, instead of using the shower; • Having cold showers. (CX113) A minority said they did not worry about the amount of water they used. This included some on fixed tariffs, which reassured them they would not be charged for excessive usage. For some, this was also fuelled by a belief that water should be free. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Tariffs	Customers see metered tariffs as a potentially effective way to encourage behaviour change, although they worry that they would be personally worse off. They are resigned to tariffs being compulsory, as they do not think it is fair to introduce tariffs that would not be imposed on unmetered customers. (PR19-45)	**Insight Sources pre-v17:** SP12 Vision 2050 Research. May 2022 **Pre-2020 Insight Sources:** PR19-45 EX13 Water Saving, Oct 2017
Vision 2050: *Help customers to use much less water at home (Ranked 15th / 19 Vision 2050 goals tested with customers)*	Many customers believe they are not personally wasteful with water. Many believe smart meters will save them some money and help the environment. There is some pushback from a minority (mainly those with less trust in Thames Water) who do not like the idea of having smart devices in their homes on the basis it may cost them more money per year. (SP12) The goal to help customers use much less water is largely supported by customers, and they expect it should save a significant amount of water. A sizeable minority wonder why Thames Water can't replicate other countries methods to work on this sooner. (SP12) 87% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. There is also widespread support for working with manufacturers of water efficient appliances on the basis that it is no effort on part of the customer and will have a big impact. A minority don't agree with using smart meters, believing it will cost them more money. (SP12)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

Enhancement Insights

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

Enhancement case / WRMP (Metering & Demand Reduction)

I want you to fix leaks and ensure there is enough water now and in the future	
Key activities	• Continuation of our government approved compulsory metering programme • Installation of ~1 million smart meters (258,000 new smart meters; 631,000 dumb to smart replacement meters; ~51,000 non-household smart meters; ~55,000 Bulk smart meters) • Increase household meter penetration to 74% household customer base • Targeted Water Efficiency: 125,000 smarter home & c30,000 business visits, targeted automated customer email engagement
What customers get by 2030	• A step towards our 2050 Vision: Smart meters in 100% household & non-household connections • Enable innovative tariffs, fairer and tailored billing, customer visibility of consumption & leaks • 1:200-year drought resilience, on track toward 2050 vision of 1:500-year drought resilience

Relative priority of enhancement area: 4th/13

Key Sources:
SP12 Vision 2050 (Help customers use much less water)
SP14 (WRSE Water resources quantitative research)
PR19-45 EX13 Water Saving
PR24-14 Acceptability and Affordability Testing (Qualitative findings)

Engagement supporting the need

- A minority of customers agreed that they were careful about how much water they use because they don't want to waste water, exhibiting habits such as turning the tap off when brushing their teeth and using a washing up bowl. It was revealed that younger customers (aged 18-24), customers from urban areas, and customers from BAME backgrounds are most likely to admit they take water for granted (SP1, R14, SP14)
- Water efficiency is rarely considered when consumers think about climate change – indeed, most are unaware of the link between water usage and the environment. As a result, consumers often see no need to use less water: there is very limited understanding that water is scarce in some areas of the UK, and little knowledge of the other environmental effects of water. (R37)
- Many customers believe they are not personally wasteful with water. Metering makes customers more aware of their water use. Most agree that metering is fair and expect that it will save them money and help the environment. (SP12, PR19-45)
- There is some pushback from a minority (mainly those with less trust in Thames Water) who do not like the idea of having smart devices in their homes on the basis it may cost them more money per year. (SP12)
- The goal to help customers use much less water is largely supported by customers, and they expect it should save a significant amount of water. A sizeable minority wonder why Thames Water can't replicate other countries methods to work on this sooner. (SP12)
- 87% of customers either somewhat or strongly support Thames Water's plan to achieve this goal ('Help customers to use much less water'). There is also widespread support for working with manufacturers of water efficient appliances on the basis that it is no effort on part of the customer and will have a big impact. A minority don't agree with using smart meters, believing it will cost them more money. (SP12)

Engagement supporting the solutions

- 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. (PR24-14)
- Customers broadly accept that extending metering is an essential part of reducing water use in our region. Customers support a roll-out of our metering programme, although they would prefer to choose rather than it being compulsory. (PR19-45)

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

Insight synthesis

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.

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

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

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

Detailed Insights

Stakeholder views

Sub-topic	Detailed Insights	Key Sources
Reducing abstraction	Customers do not support taking more water from the rivers and groundwater in normal circumstances. (PR24-1) Customers support Thames Water limiting the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains. Protecting water sources is seen as key to future sustainability and efficiency.(SP15) Stakeholders also encourage and support measures (e.g. reservoirs, reducing consumption etc.) to reduce abstraction of water from rivers, particularly those supporting rare or sensitive habitats and ecosystems, despite increasing demand caused by population growth and climate change. (S8) Customers broadly support Thames Water's proposals to improve the environmental impact of water abstraction beyond current statutory requirements, however some customers are concerned about costs. (PR24-7) Stakeholders from Local Government and community groups want Thames Water to go further and 'remove' rather than 'reduce' the strain on rivers and want Thames Water to work collaboratively where it helps to achieve this. (S18, S20) Customers had mixed views about protecting the environment by reducing water abstractions. Although in principle all customers would like to reduce harm done to the environment, many are facing financial difficulties and worry about the bill impact. Despite this, customers overall feel that action should be taken soon rather than later secure water resources. (SP21)	Insight sources v18: SP21 Thames Water WRMP Consultation, May 2023 Insight Sources pre-v17: S18 Research Summary Form – Local Government, June 2022 S20 Research Summary Form – Communities impacted by Capital Delivery, June 2022 SP4 WRSE – Customer Preferences to Inform Long-Term Water Resource Planning, March 2021 SP15 Thames Water Customer Voices Public Value Research, May 2022 PR24-1 PR24 Foundational Research - An analysis of customer views and expectation of Thames Water, November 2021 PR24-7 Deep Dive: Sustainable Abstraction, February 2022 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019 PR19-16 CR43b Stage 2 customer preferences research - water resource options, eftec/ICS, April 2017
Future supply options	Customers favour a number of new supply options to meet future demand. Customer preferences research, where a number of supply options were considered, points to a strong preference for the Teddington Transfer, followed by managing land use. (PR19-16) Supply options that have a net positive environmental impact and deliver wider public value (e.g. recreation and amenity) will be preferred. Use of chemicals, high energy use, and other unmitigated impacts are key reasons why some options are less favoured. (SP4) Environmental NGOs welcome targets to reduce pollution incidents but want constructed wetlands progressed also. Environmental NGOs are pleased if Thames Water can deliver the Water Industry National Environment Programme (WINEP) improvements for less than plan costs. (S8)	

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Low
Regional differences	Low

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

Enhancement case / Reducing abstraction from vulnerable sources

Enhancement Insights

	I want you to ensure there is enough water now and in the future
Key activities	• Abstraction reduction in up to four rivers in AMP8 – Pang, Tillingbourne, Hogsmill and Lee. Investment mainly required to install new trunk mains to bring in water from other parts of the network • Fish passage schemes, river restoration, and low flow investigations
What customers get by 2030	• 17 Ml/d (possibly up to 80 Ml/d by end AMP9) reduction in abstraction – on track towards a 2050 vision target of between 100 - 500Ml/d • A clearer view of which other reductions will be required by 2050

Relative priority of enhancement area: **6th/10**

Key Sources:
CX24 Brand Surveys (Q1-Q3 21/22)
PR24-7 (Deep Dive: Sustainable Abstraction)
SP15 (Thames Water Customer Voices Public Value Research)
S18 Research Summary Form – Local Government
S20 Research Summary Form – Communities impacted by Capital Delivery
PR24-14 Acceptability and Affordability Testing (Qualitative findings)

Engagement supporting the need

- Customers do not support taking more water from the rivers and groundwater in normal circumstances (PR24-1)and they want us to limit the amount of water taken from vulnerable rivers and streams, allowing groundwater to be replenished when it rains. Protecting water sources is seen as key to future sustainability and efficiency. (SP15)
- Customers broadly support Thames Water's proposals to improve the environmental impact of water abstraction beyond current statutory requirements, however some customers are concerned about costs. (PR24-7)
- Stakeholders from Local Government and community groups want Thames Water to go further and 'remove' rather than 'reduce' the strain on rivers and want Thames Water to work collaboratively where it helps to achieve this. (S18, S20)
- Stakeholders also encourage and support measures (e.g. reservoirs, reducing consumption etc.) to reduce abstraction of water from rivers, particularly those supporting rare or sensitive habitats and ecosystems, despite increasing demand caused by population growth and climate change. (CX24)
- When customers are informed about abstraction, they support the work that Thames Water has already done to reduce abstraction from vulnerable waterways. They also appreciate the difficulty and cost of further reducing abstraction from vulnerable waterways. Customers want us to have a high degree of certainty regarding the environmental benefits of reducing abstraction before investing in alternative abstraction resources. (PR24-7)
- When compared with other areas for improvement, reducing river abstraction is seen as a lower priority versus other areas. (PR24-7)

Engagement supporting the solutions

- Support for this enhancement is high given the negligible bill impact and that customers recognise that 'protecting the environment' is a good thing and that chalk streams are rare. (PR24-14)
- Most customers were impressed by the commitment to reduce water taken from sensitive sources by 80Ml/d, however, some put less importance on protecting sensitive sources and questioned where the additional 80Ml/d would come from. (PR24-14)
- Some customers also highlighted the environmental impact of installing new trunk mains (PR24-14)

- When presented with different Options of solutions for abstraction reduction, customers prefer a medium reduction scenario (230 million litres reduction per day, ~10% compared to current abstraction) as they believe the bill impact of high reduction (535 million litres per day) may be too costly. They believe this is the best option because it represents significant progress while being affordable. (PR24-7)

Options tested:

- Low reduction- 110 million litres per day, on 8 sources in Kent, London & Herts and 9 sources in Thames Valley, with bill increases of £5 in 2030-2035, £11 in 2036-2040, £17 by 2060
- Medium reduction- 230 millions litres per day, on 11 sources in Kent, London & Herts and 14 sources in Thames Valley, with bill increases of £10 in 2030-2035, £14 in 2036-2040, £24 by 2060
- High reduction- 535 million litres per day, on 18 sources in Kent, London & Herts and 31 sources in Thames Valley, with bill increases of £12 in 2030-2035, £20 in 2036-2040, and £50 by 2060

Enhancement Case: Sustainable Abstraction

Customers support our proposals to reduce abstraction from vulnerable areas but view it as a lower priority compared with other initiatives

Customers broadly support Thames Water's proposals to improve the environmental impact of water abstraction beyond current statutory requirements, however some customers are concerned about costs.

When customers are informed about abstraction, they support the work that Thames Water has already done to reduce abstraction from vulnerable waterways. They also appreciate the difficulty and cost of further reducing abstraction from vulnerable waterways.

Customers want us to have a high degree of certainty regarding the environmental benefits of reducing abstraction before investing in alternative abstraction resources.

Though customers feel that sustainable abstraction was important, when presented with a range of Thames Water priorities they prioritise core delivery issues such as replacing aging mains and pipes and upgrading the sewer network over sustainable abstraction. Sustainable abstraction was ranked second last by customers.

Findings	Insights
51% of customers support Thames Water's plans to reduce abstraction from designated areas by 2025-2030.	These customers felt that £5 a year was a reasonable cost for these proposals
39% of customers prefer a slower pace of reductions and support plans that reduced abstractions from designated areas by 2030-2035	These customers saw sustainable abstraction as a lower priority than other initiatives.
10% of customers feel that Thames should go even further and reduce abstraction from more vulnerable areas.	These customers favoured more action on sustainable abstraction due to the perceived environmental importance of chalk streams and rivers.
No customers oppose reducing abstraction.	

Topics

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

Insight synthesis

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 24% 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.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Leakage	Middle	Core mandate of water companies but rarely impact customers on a day-to-day basis

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Key evidence sources*

PR24 foundational research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 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.

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

Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Leakage levels	Customers feel that current levels of leakage are too high. Customers are shocked when told that 24% of treated water is lost through leakage (PR19-12, PR24-12). They call for a reduction in the current leakage level to a level that is comparable to the rest of the industry and are prepared to accept some impacts on their bill and disruption from roadworks to achieve this. They expect future leakage levels to be around 14% or 15%. (PR19-12) Customers see reducing leakage as a top priority amongst core water service improvements and asking customers to cut back on their use seems unfair. There is a sense that resolving leakage issues is important (particularly where customers perceive burst pipes or leaks go unaddressed) and could have a positive knock-on effect on other areas (e.g. reliability of supply and less of a need for customers to cut down). (PR24-12) This concern is based on the leaks that they see so the situation is made worse when learning that a high proportion of leaks (70%) are in fact hidden. Customers do understand when it is explained to them that there is a point after which it becomes too expensive to fix more leaks but they say cost is not the only consideration. They call for a balance between reducing leakage and acceptable bill impacts and levels of disruption. (PR19-12) Customers recognise that traffic disruption and cost may limit what is possible in the short term. (CX37, CX45) Customers think leaks are evidence of poor maintenance and call for network improvements. To manage the issue of leakage, customers believe that replacing old pipes is crucial, that the water pipe infrastructure is out of date and vulnerable to leakage. Customers believe a systematic programme of renewal/replacements rather than ad-hoc repair is required. Prioritisation of fixing pipes in locations where leaks cause significant traffic disruption. Customers question Thames Water's targets for leakage improvements and the timeline for replacing old pipes, which is not necessarily felt to be ambitious enough. (CX45, PR24-10) Customers feel impressed about the prospect of using smart meters to combat leakage, and this makes customers feel more positive towards Thames Water. (CX45) Customers feel that reducing leaks on people's properties is seen as a productive way to save a significant amount of water. Around a quarter of customers would like Thames Water to reduce leaks that are on its network and feel the targets (halving leakage by 2050) are not ambitious enough to make an impact. Those who feel the targets are fair recognise that London in particular is a challenging place to make improvements to and that minimising disruption is a realistic consideration to the overall plan. (SP21)	Insight Sources v18: SP21 Thames Water WRMP Consultation Insight Source v17: PR24-12 PR24 Enhancement Package Options research , September 2022 Insight Sources pre-v17: CX37 Leakage Website Report Testing, January 2022 CX45 Thames Water Board and Customer Engagement Session on Leakage, July 2020 PR24-10 Deep Dive: Trunk Mains and Replumb London, February 2022 Pre-2020 Insight Sources: PR19-12 CR29c Leakage research, BritainThinks, April 2017

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

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

Stakeholder views

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Prioritisation of leakage reduction over new sources of supply	In WRSE research, customers see leakage as a top priority in improving the efficiency of the water supply system. (SP19) When considering a range of water resource options, customers put leakage reduction second in their order of priority only behind water efficiency campaigns. (PR19-58) 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. (PR19-58) Stakeholders from Local Government want Thames Water to operate the kit they have effectively and efficiently rather than investing in new technology. (S18) Customers are prepared to give Thames Water the benefit of the doubt for the cause of leakage. However, they are demotivated to reduce their consumption considering the volume of water that is leaked through the Thames Water network. All respondents agree that that Thames Water needs to quickly solve this issue and demonstrate that their investment is making a difference. (CX104)	Insight Sources v18: CX104 Thames Water perception & behaviour research, May 2023 Insight Sources v17: SP19 WRSE Best Value Criteria Customer Research, May 2021 Insight Sources pre-v17: S18 Research Summary Form – Local Government SP12 Vision 2050 Research. May 2022 Pre-2020 Insight Sources: PR19-58 CR29a WRMP Stage 1, BritainThinks, Oct 16
Vision 2050: *Reduce leakage to below 10% (Ranked 4th by customers)*	Many feel they are directly impacted by leakage through higher bills which could otherwise be avoided. This is the main driver of why they feel this is important. Some are frustrated that leakage has got to these levels, believing Thames Water has sat on the issue for too long. In contrast, many respondents acknowledged the logistical complexity involved in reducing leakage. Overall, customers view this as an urgent core responsibility to tackle as soon as possible. (SP12) The majority of customers support this goal but struggle to understand how it will take 28 years to replace pipes. Some said that they would be more accepting of the timeframe if they knew the context behind it, however, at a glance, Thames Water should prioritise making these improvements much faster if this is possible. (SP12) 91% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. (SP12) Additionally, although many people support the use of smart meters, they wonder why Thames Water's plan assumes it takes 28 years to have these installed en-masse. (SP12)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Low
Regional differences	Low

Performance Commitment - Leakage

Customers' views on proposed performance commitments were gathered through recent qualitative Acceptability and Affordability Testing (PR24-14)

Actions and benefits	Continue to find and fix leaks Use smart meters Better manage pumps, valves and water pressure to reduce strain across network
Importance	High
Current performance	Unacceptable
Headline message	Leakage is wastage
Response to Target	More ambition wanted
Keen to understand / see	Long-term pipework replacement Smart networks More innovation
Divergence across segments	None

Overall response

- Spontaneous concern about current leakage performance – it's visible 'and aggravating'
- Important area to address given old infrastructure and pipework
- Leakage is wastage – cost impact, environmental impact, water security impact
- Disingenuous to ask customers to preserve water usage
- Not everyone understands the leakage on network/customer boundary Leakage linked to supply interruptions/water security

Performance against target / other companies

- Company performance is disappointing
- Leakage is high compared to other companies
- 'How is it possible they are performing within target' – targets weak
- Some allowances for unique infrastructure, Victorian pipes but majority are less forgiving

Response to 2025-2030 target

- Target is positive and feels challenging but realistic
- Acknowledge that this is a 20% reduction
- 100 litres per property per day is still too much
- However, maj want to see more ambitious target

Business plan and quantitative considerations

- Review target
- Mention pipework replacement, how will smart meters be used, talk about smart network with sensors, proactive vs reactive strategy
- Would like to know % reduction and last 10 year performance

Topics

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

Insight synthesis

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 to ensure healthy rivers that support a wide variety of activities including wildlife, fishing and recreation including swimming.

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)

Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Pollution incidents	Middle	Managing pollution incidents very important as perceived to relate to malpractice, however, low awareness/ knowledge impacts importance
River water quality	Middle	Quality of river water central to environment and connected to supply.
Bathing water quality	Lower	Avoidable and not felt to be a real problem – views differ at a local/regional level, where people are actually affected.

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

Key evidence sources*

PR24 foundational research	PR24 enhancement deep dives
Ofwat PR24 collaborative research	PR19 insights
Vision 2050 research	Public Value research
CX surveys	BAU customer research
DWMP	PR24 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.

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

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Pollution incidents (1/3)	The duration, frequency and severity of poor river quality incidents are the most important factors for customers when thinking about river quality. Untreated sewage has overtaken litter, fly tipping and business waste (chemicals) as the biggest cause of river pollution in the eyes of the public. (PR19-8, R29) Negative press regarding river pollution has a strong impact on customers. (PR24-2, CX23) Customers are invested in hearing more about river health, pollution and biodiversity initiatives. (CX22, CX23) Customers are prepared to tolerate short term river quality problems but if it has always been a problem they are less forgiving. Slow flowing, unclear and slightly stagnant rivers cause concern for customers, as do poor quality in waters used for fishing and where waterways are used for water sports. Customers believe that water companies should never plan to take actions that damage the environment. (PR19-8) River quality starts to be seen as problematic if it happens once every few years. Happening once a year or more is seen as intolerable. When responding to DWMP, 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 area compared to London for household respondents, and slightly stronger for household respondents compared to non-households. (PR19-8, SP16) The majority of customers recall recent controversies and media coverage surrounding sewage spills into rivers and water quality, and although they generally have a low understanding of the issue, they are angry continues to take place. Some customers want more transparency from Thames Water around how / why it happens and how it is being rectified. (SP10) Almost unequivocally, customers want Thames Water to act sustainably and protect the environment. Avoiding the pollution of waterways is mentioned often. Some expand upon this, highlighting they should do more to avoid polluting waterways. (PR24-2, CX29, PR24-3) Customer reactions to Thames Water service commitments on reducing river pollution are largely positive, though there are calls for further detail and proof in some cases. Customers in the community largely accept these promises at face value, there were fewer requests for details compared with the water and waste service commitments. (PR24-2) Awareness and concern around river health has grown enormously over the last few years amongst stakeholders in all regions, but focussed especially in North Thames Valley. (S38) Customers support Thames Water's commitment to eliminate river spills completely by 2030. (PR24-6)	Insight Sources v18: S38 Elected representative issues tracker. May 2023 Insight Sources v17: SP16 DWMP Customer Consultation, September 2022 Insight Sources pre-v17: R29 CCW Awareness and perceptions of river water quality, April 2022 SP10 Thames Water Customer Voices: Non-Compliance in Sewage Treatment Works, December 2021 CX29 Thames Water Customer Voices Key Insights 2021-2022 (January 2022) PR24-2 PR24 Foundational Research - Customer Voices, November 2021 PR24-3 PR24 Foundational Research – Social Media, November 2021 PR24-6 Deep Dive: River Spills, February 2022 Pre-2020 Insight Sources: PR19-8 CR26c Deep Dives, River Quality, BritainThinks September 2016

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Stakeholder views | Detailed Insights | Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Pollution incidents (2/3)	Stakeholders see sustainability and environmental protection as a key long-term challenge. Attitudes towards water companies are either neutral or negative. Pollution incidents undermine initiatives and progress made by the sector. Water pollution is a main concern and there are doubts that water companies take their responsibility to protect the natural environment seriously enough (S14) Avoiding pollution incidents is a top priority for household customers, consistent with potential severity of impact on rivers and wildlife. The ranking is slightly lower for non-household customers. Negative press regarding river pollution has a strong impact on customers. (PR19-8, SP9) Customers do not like that in some circumstances river spills are legal and that Thames Water has paid fines for river spills, but when they are informed on the topic they agree that protecting homes and property from sewerage flooding should be prioritised over preventing river spills. (PR24-6) River contamination incidents have become a predominant, mainstream concern following sustained, high-profile media coverage. Stakeholders point out that the public is now hyper aware of the issue and tracking progress more closely. Related negative stories are consistently and spontaneously mentioned by stakeholders. (S39) While Thames Water's near-live map of storm overflow spills highlights the extent of pollution issues, stakeholders are impressed at the level of detail even in low performing areas and access Thames Water is allowing to their operations. (S39) Along with communicating on broader strategy, proof-points such as the real-time map provide an opportunity for stakeholders to measure progress, and engenders trust. Thames Water should sustain this transparency around data-sharing to demonstrate where performance has improved and action has been taken. (S39) Regulators provided feedback regarding the storm overflow targets defined in the DWMP plan and indicated that the DWMP would be improved by including a constrained profile which shows milestones and prioritisation, to provide evidence on the cost for these storm overflow schemes. (SP20) Regulators also said a new scenario is required in the programme appraisal to show the impact of undertaking water quality monitoring of sewer overflows. (SP20) Stakeholders indicated that a 2050 target of 10 spills per storm overflow per annum is not ambitious enough, and both stakeholders and regulators indicated that storm overflows which impact the most sensitive catchments and/or overflows that discharge greatest volumes and caused the most pollution, should be identified, prioritised and targeted early in the programme. (SP20) The regulators requested for detail around how improved monitoring, including EDM and continuous water quality of outfalls, will inform adaptive pathways. (SP20)	Insight Sources v18: S39 Stakeholder Reputation Research Report. March 2023 SP20 DWMP Consultation response – You Said We Did. May 2023 Insight Sources pre-v17: PR24-6 Deep Dive: River Spills, February 2022 SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3, November 2021 S14 Stakeholder Reputational Research. March 2022 Pre-2020 Insight Sources: PR19-8 CR26c Deep Dives, River Quality, BritainThinks September 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Stakeholder views | Detailed Insights | Vision 2050

Sub-topic	Detailed Insights	Key Sources
Pollution incidents (3/3)	Stakeholders provided feedback towards the solutions and delivery plan proposed in the dDWMP, and indicated that there should be more references to Agriculture and farming benefits e.g., to store and slow flows across agricultural land (SP20)	Insight Sources v18: SP20 DWMP Consultation response – You Said We Did. May 2023 Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022
Vision 2050: *Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers (Ranked 7th / 19 Vision 2050 goals tested with customers)*	The majority of customers see preventing sewage spills into rivers as an important issue due to potential health risks. Those who live near rivers and with personal experiences feel particularly frustrated with this area. However, customers recognise that other issues as more of a priority if not directly impacted. (SP12) This goal is largely supported by customers that welcome the 2027 target of no incident, however, some believe Thames Water should be more proactive when it comes to this issue and implement more preventative measures. (SP12) 94% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most feel it is Thames Water's responsibility to be involved, but also the wider community could help with this goal. Many people are very receptive for the completion of the Thames Tideway super sewer and optimistic it will help achieve this goal. (SP12)	

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

Stakeholder views | Detailed Insights

Sub-topic	Detailed Insights	Key Sources
Improving water quality	Customers have a very strong preference for water companies to go beyond minimum requirements for protecting the environment. (PR24-2, CX24) In unprompted customer feedback, a number of customers mentioned that Thames Water should do more to ensure waterways are clean and to ensure the wellbeing of wildlife. Some customers said they wanted to see cleaner waterways and for Thames Water to work in the least environmentally damaging way possible. (SP9) Some customers want Thames Water to do more to improve visual amenity (i.e. the views and surroundings that create the backdrop to an area) at waterways at its sites. (PR24-2, SP9, SP11) Most customers support the establishment of a dedicated section of the River Thames for swimming. (PR24-5) NGOs particularly respect and admire the continued commitment Thames Water has to the water courses and local natural environment of which it is the custodian (S14) and those with interest in environmental matters see areas of improvement in Thames Water's record on pollution incidents and wider concerns around the health of English rivers (S39) While learning that no UK river is officially safe to swim in is shocking and concerning, this is felt to be of lower importance in comparison to others where customers felt there were health risks (i.e. sewage flooding) and severe environmental risks (i.e. river pollution). Some also felt this would naturally be achieved through other improvements, such as reducing sewage spills (PR24-12) Most had not heard of phosphorus or weren't aware it's in rivers. Although this was clarified by moderators, it can make individuals both more fearful about the risk, and / or less engaged about the enhancement. Despite this, some feel removing 75% of phosphorus as a standard improvement is enough. However, a few are passionate about the need to improve river health further and recognise the importance of clean rivers in terms of the entire water cycle. (PR24-12) Most customers believe the council, water companies and environmental bodies should be responsible for investing in the quality and upkeep of rivers and waterways, with only a small proportion of customers believing that bill payers should bear these costs. (SP11) Just over half of customers were satisfied in 2022 with Thames Water's cleaning of wastewater before releasing it back into the environment, a 10% increase over the previous year (CX110). Analysis of posts on Twitter show that at the highest level, customers believe Thames Water have a responsibility to protect local waterways and rivers. This is reinforced by words such as 'natural' and 'green'. 'Improve' is also widely mentioned, implying customers want Thames Water to do even better in this area. (PR24-3) Whilst most customers view rivers and streams as safe for recreation nearby or on the water (though less so for activities which involve entering the water) the majority (65%) want planned improvements to ensure that the river is a healthy habitat for wildlife. 10% think that ensuring that rivers are safe to swim in is most important. (R29)	Insight Sources v18: S39 Thames Water Stakeholder Research. May 2023 CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 Insight Sources v17: PR24-12 PR24 Enhancement Package Options research , September 2022 Insight Sources pre-v17: R29 CCW Awareness and perceptions of river water quality, April 2022 S14 Stakeholder Reputation Research, March 2022 CX24 Brand Survey (Q3 2021/22), December 2021 PR24-2 PR24 Foundational Research - Customer Voices, November 2021 PR24-3 PR24 Foundational Research – Social Media, November 2021 PR24-5 Deep Dive: Bathing Water, February 2022 SP9 DWMP - Customer Research: Part 3 Quantitative Research - Final Report (Nov 21), November 2021 SP11 Smarter Water Catchment Survey, November 2021

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

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

River health

Detailed Insights

Vision 2050

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Lead the improvement of rivers in the region so they become among the healthiest in the UK (Ranked 9th / 19 Vision 2050 goals tested with customers)*	Enjoying rivers for recreational purposes is what makes this initiative important for some, as they are surprised at how few rivers have a 'good' environmental status. For other customers, the environmental element is more important, to ensure future generations can enjoy rivers. However, others feel that this issue is more exclusive to people who frequent rivers regularly and thus not a priority to themselves personally. (SP12) The goal is largely supported by customers who believe it will have a positive impact on communities and wildlife. Yet, a few feel improving 75% of rivers didn't go far enough before 2050 and more can be done sooner. (SP12) 94% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most feel that Thames Water should be involved and welcome the collaboration with other groups like the Environment Agency and some are unsure of Thames Water's motivations to take on a leadership role in this issue. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	Med
Regional differences	Med

WS2. I want you to stop polluting rivers and to improve their quality
Enhancement case / Reducing spills into rivers

Enhancement Insights

I want you to stop polluting rivers and to improve their quality	
Key activities	• Improved sewage treatment processes for nutrients, sanitary parameters and chemicals. Reducing spills by addressing misconnections (from surface into foul sewers), providing more storage / capacity in the system. Chemical investigations, invasive species, eels and fish passage, bathing water, biodiversity, habitat, flow monitoring, river monitoring, nutrient neutrality
What customers get by 2030	• 50% reduction in duration of spills entering the environment by 2030 on our way towards elimination by 2050. • By 2035, we will remove 90% of the phosphate in treated water entering rivers (an improvement from ~75% phosphate removed today) • Rivers protected from deterioration and compliance with new environmental regulations – environmental improvements

Relative priority of enhancement area: 3rd/13

Key Sources:
PR24-6 (Deep Dive: River Spills)
PR24-12 PR24 Enhancement Package Research
SP12 Vision 2050 (Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers)
PR24-15 PR24 Enhancement Case Deep Dive Research
PR24-14 Acceptability and Affordability Research

Engagement supporting the need

- All customer groups are concerned about raw sewage entering rivers as a result of storm overflows, due to the potential harm to health from low quality water. Many are also concerned about harm to wildlife and the environment. Customer concern around this issue increases further when informed about future risks to the system, such as climate change and population growth – many are aware of negative media coverage. (PR24-15)
- Reducing pollution of rivers feels important to vast majority of customers, who view this practice as unacceptable and that it needs to be stopped, therefore, more ambition is desired from Thames Water. Customers perceive Thames Water's performance in this area as poor but not as bad as other water companies. There is a sense that quality of rivers is a shared responsibility – not just an issue for Thames Water and their customers. (PR24-14)
- Customers do not like that in some circumstances river spills are legal and felt they occur too frequently and want faster progress on reducing incidents. Most customers use and enjoy their local waterways and are emotionally invested in their environmental wellbeing. Even those customers that do not regularly visit their local waterways care about their environmental condition and reducing pollution. However, when customers are educated on the relatively low environmental damage caused by river spills and the occasional necessity of allowing river spills in order to protect homes and property, they become much more accepting of river spills. (PR24-6)
- From the PR24 Options research, customer informed that while less personally damaging compared with sewage flooding, there is general agreement that Thames should be reducing pollution in rivers sooner rather than later. For some, this comes from seeing news stories about sewage being 'dumped' in rivers while for others, it is about a wider negative impact on wildlife and the surrounding environment. (PR24-12).
- Most recall recent controversies and media coverage surrounding sewage spills into rivers and water quality, and although they generally have a low understanding of the issue, they are angry it continues to take place. (SP10)
- The majority see preventing sewage spills into rivers as an important issue due to potential health risks. Those who live near rivers and with personal experiences feel particularly frustrated with this area. However, customers recognise that other issues as more of a priority if not directly impacted. (SP12)

Engagement supporting the solutions

- **Almost all customers support Thames Water's plan** to upgrade 13 sewage treatment works as they believe this approach is cost-effective and will mitigate storm overflows. Some call for more transparency on the impacts of this approach, with a small minority calling for Thames Water funding the improvements themselves without increasing bills. Customers are of the opinion that upgrading sewage treatment works is an essential activity as part of Thames Water's core responsibilities to mitigate current and future pressures on the system. However, some are concerned about the level of disruption associated with upgrading sewer treatment works and want to know what this will mean for them and local communities. There was also some concern around delays and costs relating to planning permission. Some wanted to know whether this would be funded exclusively from increases in customer bills, especially future bill payers. (PR24-15)
- Despite the high cost, support for this enhancement (NEP Waste) is high, driven in particular media coverage of sewerage spills. (PR24-14)
- When testing options for number type and scale of solutions to reduce spills (PR24-6), customer preferred the highest of four options. 100% less sewage spill into rivers (reduced to NO spills) by finding and correcting 1000 misconnected drain pipes in properties, reducing groundwater infiltration by improving 400 sewer pipes, and creating more capacity in sewer, treatment works and storm tanks at 270 locations for £10.90 additional cost per household bill but some felt this might be unfair on the financially vulnerable. (PR24-6)
- The second most favoured option was 50% less sewage spills into rivers (reduced by a half) by finding and correcting 500 misconnected drain pipes in properties, reducing groundwater infiltration by improving 200 sewer pipes, and creating more capacity in sewer, treatment works and storm tanks at 130 locations for £4.50 additional annual cost per household bill (PR24-6)
- 64% of customers support a total elimination of storm overflows by 2030, and are willing to pay £10.90 a year for this option. 27% of customers support the 50% reduction by 2030, and are willing to pay £4.50 a year for this option*. (PR24-6)

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

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

Enhancement Case / Reducing sewage spills into rivers (2/4)

PR24 Deep Dives

Enhancement Insights

Customers believe river spills occur too frequently and want faster progress on reducing river spill incidents

Most customers use and enjoy their local waterways and are emotionally invested in their environmental wellbeing. Even those customers that do not regularly visit their local waterways care about their environmental condition and reducing pollution.

Customers believe river spills occur too frequently and want faster progress on reducing river spill incidents.

However, when customers were asked to prioritise a range of topics, customers chose to prioritise protecting properties from sewer flooding over avoiding river spills.

Option	% of customers supporting	Willingness to pay*
Support total elimination of river spills by 2030	64%	Customers are willing to pay £10.90 a year for this option. These customers had strong environmental leanings.
Support 50% reduction in river spills by 2030	27%	Customers are willing to pay £4.50 a year for this option. These customers believe this is the fairest option in terms of cost burden for customers.
Support 75% reduction in river spills by 2030	5%	Customers are willing to pay £7.30 a year for this option.
Support 25% reduction in river spills by 2030	4%	Customers are willing to pay £1.80 for this option. These customers felt that money could be better spent elsewhere given the relatively low environmental impact of river spills in comparison to other forms of pollution.

*When assessing willingness to pay, customers were made aware of current average annual household bills and were reminded that Thames Water has a range of competing priorities for funding.

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

PR24-6 Deep Dive: River Spills, February 2022

Enhancement Insights

Customer Prioritisation

WS2. I want you to stop polluting rivers and to improve their quality
Enhancement Case / Reducing sewage spills into rivers (3/4)
PR24 Deep Dives

Customers believe river spills occur too frequently and want faster progress on reducing river spill incidents

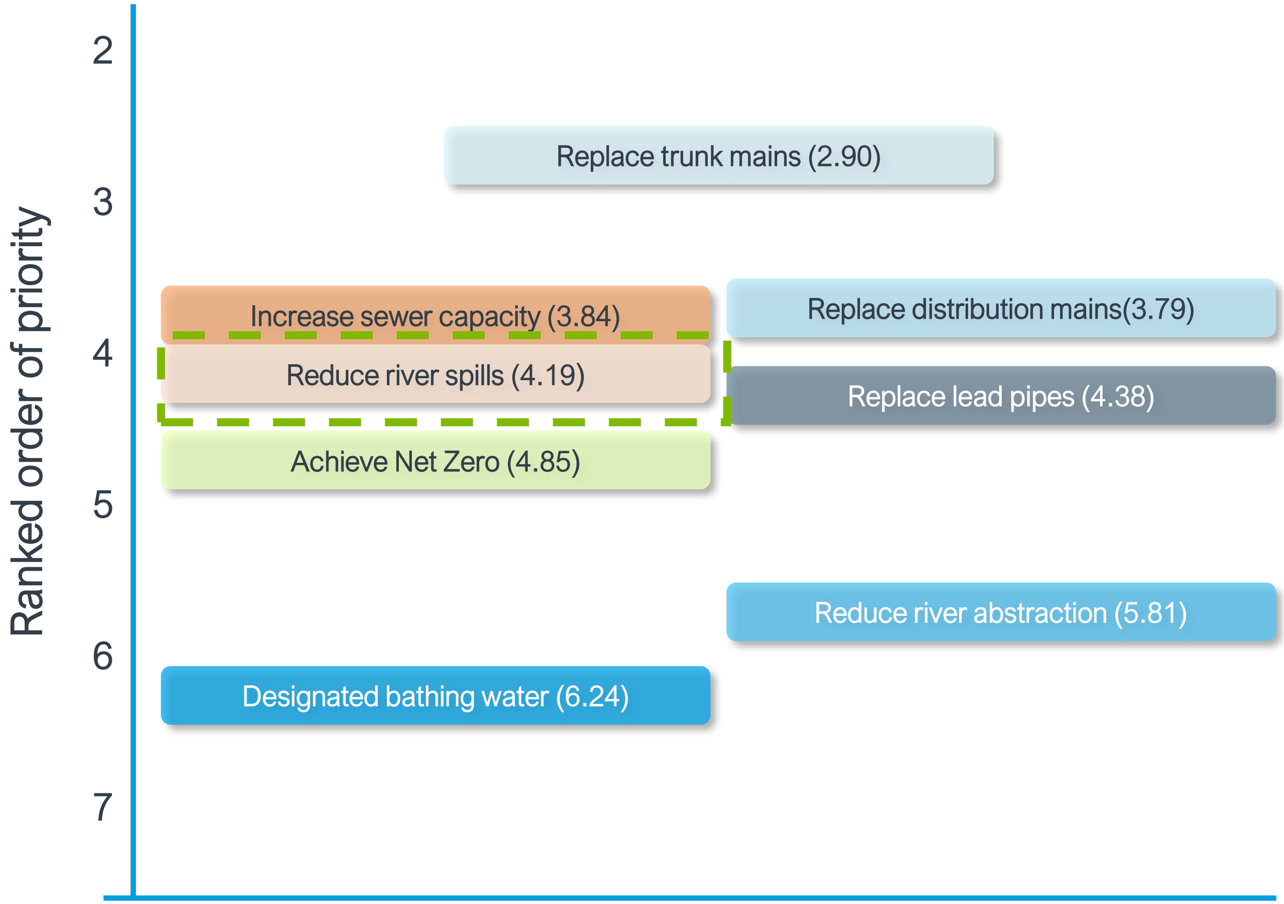
Customers do not like that in some circumstances river spills are legal and that Thames Water has paid fines for river spills. When customers are educated on the relatively low environmental damage caused by river spills and the occasional necessity of allowing river spills in order to protect homes and property, they become much more accepting of river spills.

However, even after learning about river spills and their environmental impact customers maintain a preference for further reducing river spills.

Customers agree that protecting properties from flooding should take priority over avoiding river spills, but they believe river spills occur too frequently and want faster progress on reducing river spill incidents.

Customers support Thames Water's commitment to eliminate river spills completely by 2030.

Customers want more transparency on how funding from bill increases will be spent to reduce river spills.

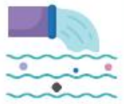


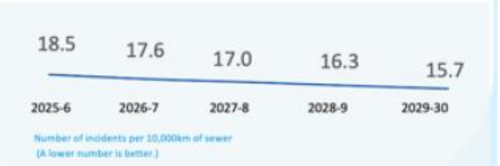
232 responses across all five deep dive research communities. Findings should be taken as indicative as customers based their answers on limited information, apart from the topic(s) that they would have just been focusing on. The scores shown are the mean rank out of 10 across all responses. *"Q. Please take a look at the main extra initiatives that Thames Water could undertake over 2025-2030, and rank them in order of priority you think Thames Water should give them, for instance where you think Thames Water need to make the most improvements. So, the most important initiative for Thames water to tackle should be no 1 and the least important initiative for them to tackle should be no 8."*

PR24-6 Deep Dive: River Spills, February 2022
PR24-13 Enhancement Case deep dive summary

Performance Commitment – Pollution incidents

Customers' views on proposed performance commitments were gathered through recent qualitative Acceptability and Affordability Testing





Actions and benefits	Providing more storage on our sewer network Repair, reline or replace old and damaged sewers Add monitors/alarms to our sewers so we get early warning of potential pollution incidents. Clean sewers and educate customers
Importance	High
Current performance	Unacceptable
Headline message	In the news all the time for this unjustifiable practice
Response to Target	More ambition wanted
Keen to understand / see	Long term strategy that will eradicate this Issue
Divergence across segments	Media driving this to be important for all Micro business customers more self focused

Overall response

- Pollution incidents were spontaneously mentioned
- Even if customer is not an angler/open water swimmer or wildlife hobbyist, this feels important
- Some make the distinction between accidental spills and discharge (latter more unacceptable)
- However, there is a sense that quality of rivers is a shared responsibility – not just Thames
- Water issue and shouldn't just fall to Thames customers

Performance against target / other companies

- Poor performance but not as bad as others/on the cusp of target
- Current performance is helpful to see improvements but still not enough
- More ambitious 5 year target required

Response to 2025-2030 target

- Reduction is good but 'km' of sewer measure feels a bit meaningless
- How much KM of sewers overall
- Often calculated in % terms e.g. 15% reduction over 5 years

Business plan and quantitative considerations

- Initiatives are good but similar to others
- Useful to see something specific that would address this particular issue
- More information about amount vs number of incidents/severity might be helpful

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

Enhancement case / Improving River Health

Enhancement Insights

I want you to stop polluting rivers and to improve their quality	
Key activities	• Improved sewage treatment processes for nutrients, sanitary parameters and chemicals. Reducing spills by addressing misconnections (from surface into foul sewers), providing more storage / capacity in the system. Chemical investigations, invasive species, eels and fish passage, bathing water, biodiversity, habitat, flow monitoring, river monitoring, nutrient neutrality
What customers get by 2030	• 50% reduction in duration of spills entering the environment by 2030 on our way towards elimination by 2050. • By 2035, we will remove 90% of the phosphate in treated water entering rivers (an improvement from ~75% phosphate removed today) • Rivers protected from deterioration and compliance with new environmental regulations – environmental improvements

Relative priority of enhancement area: 11th/13

Key Sources:
PR24-2 PR24 Foundational Research - Customer Voices
PR24-6 (Deep Dive: River Spills)
PR24-12 PR24 Enhancement Package Research
SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report
SP12 Vision 2050 (Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers)
PR24-15 Enhancement Case Deep Dive Research
PR24-14 Acceptability and Affordability Testing (Qualitative findings)

Engagement supporting the need

- This is an emotive topic that conjures imagery of polluted water, and so all different customer groups' stance is generally: 'fix this as quickly as possible'. All different customer groups are surprised and concerned about river health in the Thames Water basin. The prevalent concern across all different customer groups is that if river health is not improved this could damage public health in the form of lower quality drinking water. There is also a concern that wildlife may be harmed. (PR24-15)
- Most customers use and enjoy their local waterways and are emotionally invested in their environmental wellbeing. Even those customers that do not regularly visit their local waterways care about their environmental condition and reducing pollution. (PR24-6)
- Whilst customers are concerned that no UK river is officially safe to swim in, this is felt to be a lower priority to issues where there are potential health (i.e. sewage flooding) or environmental risks (i.e. river pollution). However, a few are passionate about improving river health further and recognise the importance of clean rivers in terms of the entire water cycle. Some feel this could be achieved indirectly through efforts to reduce sewage spills, (PR24-12)
- Customers have a very strong preference for water companies to go beyond minimum requirements for protecting the environment. (PR24-2, CX24)
- In unprompted customer feedback, a number of customers mentioned that we should do more to ensure waterways are clean and to ensure the wellbeing of wildlife. Some customers said they wanted to see cleaner waterways and for us to work in the least environmentally damaging way possible. (SP9)
- Some customers want us to do more to improve visual amenity (i.e. the views and surroundings that create the backdrop to an area) at waterways at its sites. (PR24-2, SP9, SP11)
- NGOs particularly respect and admire the continued commitment Thames Water has to the water courses and local natural environment of which it is the custodian. (S14)
- Whilst most customers view rivers and streams as safe for recreation nearby or on the water (though less so for activities which involve entering the water) the majority (65%) want planned improvements to ensure that the river is a healthy habitat for wildlife. 10% think that ensuring that rivers are safe to swim in is most important. (R29)

Engagement supporting the solutions

- **Almost all customers support Thames Water's plan** to improve river health, with the majority accepting of the proposed timescales for achieving 'no river pollution' by 2050 given the current scale of the problem, as long as Thames Water are doing everything they can to expedite improving river health. (PR24-15)
- In addition, some wanted this to happen before then and for Thames Water to implement partnerships in all catchments, where possible, by 2035. (PR24-15)
- **'Working with partners'** to improve river water quality in their area is the preferred option by all customer groups, as customers recognise there is a potentially greater chance of yielding the greatest environmental benefit, which customers interpret as 'higher water quality'. Customers support the roll-out of partnerships in catchment areas (3 to 14 by 2030 and 27 by 2035) because of the extra funding, resources and expertise gained, and additionally because it does not impact their bills. However, as this is an untested approach in some areas of Thames Water's region, they feel this should be introduced gradually. Therefore, customers view Thames Water 'working alone' i.e. in areas it is responsible as a tried and tested approach, and a much-needed short term solution which could complement partnership working. (PR24-15)
- A concern for some about **Thames working alone** were the uncertainty around associated bill impacts. (PR24-15)
- Despite the high cost, support for this enhancement (NEP Waste) is high, driven by media coverage of sewerage spills. Customers perceive the goal to reduce phosphorous entering rivers by 90% to be impressive, however, some felt this figure lacked credibility. (PR24-14)
- In the enhancement package options research, customers informed Thames Water that the goal to remove 90% phosphorous was the most impressive of all waste goals, with the overall goal felt to have positive implications for drinking water quality and an investment in the entire cycle. (PR24-12)

*n.b. there is slight bias in the way the proposed options were presented to customers in PR24-15 in that the option of Thames Water working with partners listed more benefits than the option of Thames Water working alone

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

Enhancement case / Making rivers safer for swimming and bathing

Enhancement Insights

I want you to stop polluting rivers and to improve their quality	
Key activities	• Improved sewage treatment processes for nutrients, sanitary parameters and chemicals. Reducing spills by addressing misconnections (from surface into foul sewers), providing more storage / capacity in the system. Chemical investigations, invasive species, eels and fish passage, bathing water, biodiversity, habitat, flow monitoring, river monitoring, nutrient neutrality
What customers get by 2030	• 50% reduction in duration of spills entering the environment by 2030 on our way towards elimination by 2050. • By 2035, we will remove 90% of the phosphate in treated water entering rivers (an improvement from ~75% phosphate removed today) • Rivers protected from deterioration and compliance with new environmental regulations – environmental improvements

Relative priority of enhancement area: 13th/13

Key Sources:
PR24-5 (Deep Dives: Bathing Waters)
PR24-6 (Deep Dive: River Spills)
PR24-12 PR24 Enhancement Package Research
SP12 Vision 2050 (Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers)
PR24-15 PR24 Enhancement Case Deep Dive Research

Engagement supporting the need

- Many customers are aware that Thames Water has had some form of negative press coverage on the practice of sewer spills, which they see as the cause of the poor water quality in Wolvercote. They believe Thames Water has not invested enough in the wastewater network and are disappointed Wolvercote is in poor condition (PR24-15)
- Some are concerned about the impacts on wildlife and the environment if bathing waters are not maintained and/or improved (PR24-15)
- Most customers use and enjoy their local waterways and are emotionally invested in their environmental wellbeing. Even those customers that do not regularly visit their local waterways care about their environmental condition and reducing pollution. (PR24-6)
- While learning that no UK river is officially safe to swim in is shocking and concerning, this is felt to be of lower importance in comparison to others where customers felt there were health risks (i.e. sewage flooding) and severe environmental risks (i.e. river pollution). However, a few are passionate about the need to improve river health further and recognise the importance of clean rivers in terms of the entire water cycle. Some feel this improvement would be an indirect consequence of other improvements, such as reducing sewage spills, and therefore place this lower in importance than reducing spills. (PR24-12)
- Whilst most customers view rivers and streams as safe for recreation nearby or on the water (though less so for activities which involve entering the water) the majority (65%) want planned improvements to ensure that the river is a healthy habitat for wildlife. 10% think that ensuring that rivers are safe to swim in is most important. (R29)
- Many customers would like to see a designated stretch of the river Thames suitable for bathing; while many do not swim in rivers themselves, some are still supportive of this. The majority support the creation of one designated stretch of bathing water during 2025-2030. However, bathing waters are a lower priority for customers than other infrastructure upgrades including replacing aging mains and pipes and upgrading sewers. River swimming is seen by some customers as a luxury compared to delivery of core services. (PR24-5).
- Most customers support the establishment of a dedicated section of the River Thames for swimming. (PR24-5)
- Some customers highlight the physical and mental health benefits of swimming and the fact that it simply isn't good for the water to be unclean. (PR24-5)

Engagement supporting the solutions

- **The vast majority of customers support Thames Water's plan** to improve the number and quality of bathing waters because of the increased wellbeing of nature and residents. They perceive the bill impacts associated with protecting local wildlife and environment for communities to be negligible, however, some feel that this is a 'nice to have' and shouldn't be prioritised over other more pressing issues. (PR24-15)
- Some also questioned whether customers should have to pay for this, given it is perceived to be a result of historic underinvestment by Thames Water, and wondered realistically how many customers would actually benefit from this improvement. (PR24-15)
- The minority of those less supportive of this feel it simply isn't a priority for us to invest in (against a backdrop of other issues) and that some customers (including those on low incomes) may end up paying for a resource they don't use. (PR24-5)
- Views on funding additional bathing areas are mixed. Only a small number of customers supported bill payers funding additional bathing waters. (PR24-5)

WS2. I want you to stop polluting rivers and to improve their quality
Enhancement Case / Bathing Waters
PR24 Deep Dives

Most customers support designating an area for swimming on the River Thames, but it is a lower priority than replacing water pipes and sewers.

Bathing waters are a lower priority for customers than other infrastructure upgrades including replacing aging mains and pipes and upgrading sewers. River swimming is seen by some customers as a luxury compared to delivery of core services.

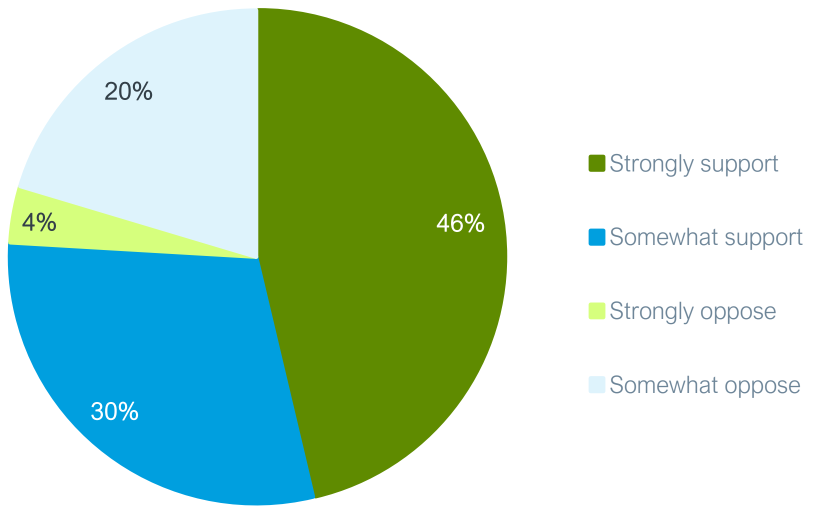
Many customers would like to see a designated stretch of the river Thames suitable for bathing; while many do not swim in rivers themselves, some are still supportive of this. The majority support the creation of one designated stretch of bathing water during 2025-2030

Having been provided information on the Oxford Rivers Project, and the cost per year of creating a designated stretch of bathing water in the river Thames, just over three quarters of customers strongly or somewhat support the creation of a designated stretch of river for bathing

- Some highlight the physical and mental health benefits of swimming and the fact that it simply isn't good for the water to be unclean
- The minority of those less supportive of this feel it simply isn't a priority for Thames Water to invest in (against a backdrop of other issues) and that some customers (including those on low incomes) may end up paying for a resource they don't use

Views on funding additional bathing areas are mixed. Only a small number of customers supported bill payers funding additional bathing waters.

To what extent do you support or oppose Thames Water investing in the creation of one designated bathing water (safe for swimming) stretch of river in the Thames Water region during 2025-2030, with a 15p impact on all customer annual bills?



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

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

Enhancement case / Infiltration

Enhancement Insights

	I want you to stop polluting rivers and to improve their quality
Key activities	• Investing to make our sewerage systems more resistant to groundwater infiltration to reduce the frequency or duration that sewers overflow to rivers. • Investment focus on either making sewers more water-tight (sealing our sewers and manholes) or treating and releasing the groundwater impacted flow (increasing capacity of treatment works and/ or adding nature-based solutions).
What customers get by 2030	• Counts towards almost half of our 50% reduction in duration of sewage overflow spills to the environment by 2030. • Mitigation to the impact posed by climate change as well a critical contribution to meeting our 2050 target of elimination of sewage overflows. • Creating opportunity for our rivers to improve and ensuring they are protected from further deterioration.

Relative priority of enhancement area: 8th/13

Key Sources:
PR24-6 (Deep Dive: River Spills)
SP12 Vision 2050 (Stop all sewerage flooding into homes, gardens and businesses
SP6 & SP9 DWMP value criteria customer preference Qual and Quant
SP16 DWMP Customer Consultation
SP20 DWMP Customer Research Technical Report
PR24-12 PR24 Enhancement Package Research
PR24-15 PR24 Enhancement Case Deep Dive Research

Engagement supporting the need

- The majority of customers are surprised by the number of sewer spills which occur due to groundwater sewer infiltration and are particularly concerned that contamination to water and surrounding areas will harm the environment and wildlife, as well as lowering the quality of life for customers i.e. causing foul odours in the streets. (PR24-15)
- Household and non-household customers in particular see this is issue as very important to address, compared with future bill payers. (PR24-15)
- Customers are also concerned that wastewater infrastructure will degrade over time and that external pressures such as climate change and population growth will exacerbate the issue in the future if it goes unaddressed. (PR24-15)
- A sizeable proportion of respondents found spills unacceptable in principle (around 1 in 3). This view was slightly stronger in the Thames Valley area compared to London for household respondents, and slightly stronger for household respondents compared to non-households. (SP16)
- From PR24 enhancement case deep dive research on reducing river spills, customers told us they felt river spills occur too frequently and want faster progress on reducing river spill incidents. However, when customers are educated on the relatively low environmental damage caused by river spills and the occasional necessity of allowing river spills in order to protect homes and property, they become much more accepting of river spills (PR24-6)
- From the PR24 Options research, customer informed that while less personally damaging compared with sewage flooding, there is general agreement that Thames should be reducing pollution in rivers sooner rather than later. For some, this comes from seeing news stories about sewage being 'dumped' in rivers while for others, it is about a wider negative impact on wildlife and the surrounding environment (PR24-12)
- Customers and stakeholders have made it clear that they expect 'Rapid Progress' on improving our storm overflow performance.
- Customers have told us that they want our wastewater systems to be improved to ensure they are resilient today and, in the future, (including future impacts from climate change) and have called for investment in long-term and cost-effective solutions that meet future challenges. (PR24-1)
- Keeping rivers clean is our customers' Public Value top priority; customers expect us to keep rivers clean by preventing unwanted flow from leading to the operation of sewage overflows and sewage spills into rivers; reducing the frequency, severity and duration of pollution incidents as well as improving the quality of rivers and waterways, going above and beyond what we are permitted to spill with our current EA permits. (SP15)

Engagement supporting the solutions

- **Almost all customers support Thames Water's plan** to prevent groundwater sewer infiltration. The majority support the approach and see the costs as negligible compared to the positive impacts, however, some wanted to see Thames Water achieve this as soon as possible. (PR24-15)
- **'Reduce sewer overflows by increasing the size of sewage treatment works'** was the preferred approach of both household and non-household customers, as this was seen as the most reliable approach to reducing sewer infiltration which also has negligible bill impact. (PR24-15)
- Future bill payers expressed a slight preference for **'reducing sewer overflows by lining sewer pipes'** as this was perceived as a more innovative solution with long lasting benefits. This option was thought to potentially result in less disruption to local communities than expanding sewage treatment works and would not likely need to be upgraded. It was also seen as cost-effective in the long-run, however, some questioned its reliability as a relatively untested approach. (PR24-15)
- Household and non-household customers also expressed moderate support for **'reduce sewer overflows by creating wetlands'** as it would also bring benefits to local wildlife and communities. However, this has not been tested at scale, would take time to establish, and is only applicable in certain areas of Thames Water's region (future bill payers were significantly less likely to support this approach). (PR24-15)

WS3. I want you to reduce emissions and reach net zero / Net zero carbon

Insight synthesis

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

Customer preferences from Ofwat / CCW PR24 Collaborative Research (across companies)		
Performance Commitment	Importance (Lower / Middle / High)	How do customers view this?
Carbon	Lower	Not as well understood and difficult to relate to what other companies are doing.

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

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

WS3. I want you to reduce emissions and reach net zero /

Net zero carbon

Stakeholder views

Detailed Insights

Segmented Insights

Sub-topic	Detailed Insights	Key Sources
Renewable energy generation and use	When considering new water resource options, customers tend to value those that use renewable energy more highly. (PR19-16) Customers trust us to be experts in our field, making the right long-term decisions for them, including the generation of our own power. (SP9) Customers generally have a low awareness of how water companies themselves may impact climate change in the future. Only a minority of customers appear to have a good understanding of the use of renewable energy as a way in which water companies can reduce their contribution to climate change. However, when informed on specific measures – including generating and buying renewable energy – the majority think these could help reduce carbon emissions. (R13) Customers have low levels of awareness of waste to energy schemes. When customers are informed of these projects, they are strongly supportive. Only 8% were aware that Thames generates its own energy. (CX22) Customer interest in Thames Water renewable energy orientated initiatives has decreased between Q3 and Q4 22-23, however, remained stable into Q1 23/34 (CX114, CX120). Climate change news, programming and discussion has continued to grow in prominence over the last few months too. 85% agree that they like to do their bit to help the environment, 79% are concerned by climate change and its effects on the environment, 78% believe technology can improve service from companies like Thames Water and 77% think it is important that companies are a force for good. (CX23) An analysis of posts on Twitter showed that Thames Water's use of green energy sources and Thames Water's commitment to carbon neutrality had particularly strong traction with the public. There were a few comments latching onto the ambiguity of how the business would achieve this, highlighting that keeping customers updated of the progress in this area is should not be overlooked. (PR24-3) Business customers want clearer communication on Thames Water's role and activities, investment into green energy and supporting customers to have lower bills. (PR24-11) Stakeholders support water companies' regional planning intention on the achievement of Net Zero as soon as possible. The regional plan builds on the water industry Routemap 2030, and they welcome the sector being a leader in this space (S7) Regulators wanted to see Thames Water position themselves as as a leader when it comes to innovation (i.e. green energy) and pushing the sector forward. (S39)	Insight Sources v18: S39 Stakeholder Reputation Research Report. March 2023 CX114 C-MeX CES and Brand Survey Q4 2022-2023, March 2023 CX120 C-MeX CES and Brand Survey Q1 2022-2023, August 2023 Insight Sources pre-v17: R13 CCW WaterVoice Window 4 Summary Report, June 2020 PR24-11 PR24 Foundational Research: What is important to Future Bill Payers and Business Customers, May 2022 CX22 Brand Survey (Q1 2021/22), June 2021 CX23 Brand Survey (Q2 2021/22), September 2021 PR24-3 PR24 Foundational Research – Social Media, November 2021 S7 Blueprint for Water Insights, July 2021 SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021 Pre-2020 Insight Sources: PR19-16 CR43b Stage 2 customer preferences research - water resource options, eftec/ICS, April 2017

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

Stakeholder views | Detailed Insights | Segmented Insights

WS3. I want you to reduce emissions and reach net zero /

Net zero carbon

Sub-topic	Detailed Insights	Key Sources
Approach to decarbonization	Future bill payers see reducing emissions and reaching net zero as more of a concern than other customers. (PR24-11) Customers are supportive of Thames Water's goal to achieve operational net zero by 2030 and believe that the costs of these plans represent good value for money. Customers are pleasantly surprised by the relatively low impact to bills needed to achieve operational net zero. When informed of the initiatives Thames Water intends to roll out to achieve net zero, customers strongly support most initiatives, with a few initiatives receiving moderate support. The initiative most strongly favoured by customers is capturing green gas from sewage. (PR24-4) 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, believing the issue is urgent and tackling it seems achievable in a ten-year period. However, less than half are confident that water companies will achieve net zero by 2030 (R13). Stakeholders provided feedback towards the solutions and delivery plan proposed in the DWMP, and indicated that there should be greater emphasis on carbon neutrality and nature recovery support. (SP20) Amongst majority of household customers, there has been a general shift in awareness, belief and support of environmental issues. However, it is evident that not all non-household customers support a bill increases aimed at addressing environmental issues. (SP20) There are three environmental customer perspectives: 1) Climate believers: these customers believe climate change is happening and have personal experience of its impacts/have heard of the impacts. 2) Climate engaged: these customers believe climate change is happening and they want action to be done. They support positive change to benefit the environment. 3) Climate active: these customers believe climate change is happening and they are doing something about it. (PR24-14) The issue of climate change seems to decrease in importance with age of younger/future customers. Older, more established/settled groups are more concerned about the ongoing cost of living crisis whereas younger groups are more passionate about climate change and the environment. (CX122)	Insight Sources v18: SP20 DWMP Consultation Response – You Said We Did. February 2023 PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023 CX122 Future Customers context research, August 2023 Insight Sources pre-v17: R13 CCW WaterVoice Window 4 Summary Report. June 2020 PR24-4 Deep Dive: Net Zero, February 2022 PR24-11 PR24 Foundational Research: What is important to Future Bill Payers and Business Customers, May 2022

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

Detailed Insights

Vision 2050

WS3. I want you to reduce emissions and reach net zero /
Net zero carbon

Sub-topic	Detailed Insights	Key Sources
Vision 2050: *Maximise the green energy produced for Thames Water and local communities (Ranked 13th / 19 Vision 2050 goals tested with customers)*	Most customers see being self-sufficient for energy as important and admirable, and think Thames Water can lead in this space. However, some are sceptical of the prioritisation of this goal over other more customer-facing issues. (SP12) The goal is applauded by most, with being self-sufficient for energy, reducing emissions and selling surplus to the National Grid being the key benefits. Some feel the urgency of this demands a shorter timeframe than currently planned. (SP12) 96% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Many are generally supportive but feel the details are too sparse to cast judgement and few question the return on investment. (SP12)	Insight Sources pre-v17: SP12 Vision 2050 Research, May 2022
Vision 2050: *Help tackle climate change by becoming 'net negative' (Ranked 14th / 19 Vision 2050 goals tested with customers)*	Most customers see becoming 'net negative' as an important issue, with climate change top of mind. However, some see this issue in isolation as when compared to other issues, they would rather see priorities go elsewhere. (SP12) The goal is largely supported by customers, mainly due to the perceived importance of sustainability and climate issues. A small minority are sceptical of the benefits for investing here, wanting the focus to be on service and quality issues. (SP12) 93% of customers either somewhat or strongly support Thames Water's plan to achieve this goal. Most feel this is sensible for Thames Water to be involved in, and are impressed at how energy is self-generated. For some, while the 2030 'net zero' plan is praised, this makes the 2050 vision feel slow and unambitious by comparison. (SP12)	

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	Med
Regional differences	Low

WS3. I want you to reduce emissions and reach net zero / Enhancement case / Industrial Emissions Directive

Enhancement Insights

I want you to reduce emissions and reach net zero

Key activities	• Providing physical containment interventions for catastrophic failures of Bioresources civil assets, provide cover and treat interventions for those Bioresources civil assets where emissions are detected and to provide appropriate documentation as identified for the permit.
What customers get by 2030	• Elimination of the risk of sludge pollution as a result of civil asset catastrophic failure • Reduction in Greenhouse Gas emissions to assist with NZC targets • Resilient sludge treatment processes in line with permit requirements • Compliance with the Industrial Emissions Directive

Relative priority of enhancement area: 10th/13

Key Sources:
PR24-4 Deep Dive: Net Zero
PR19-7 CR26c Deep Dives Odour, BritainThinks
PR19-13 CR32 Being a good neighbour, BritainThinks
R16 MACRO4 – Utility Customer Research

Engagement supporting the need

Net zero / carbon emissions

- Customers support our decarbonisation plan to achieve Net Zero and feel that it delivers compelling value. Customers ranked capturing and refining green gas from sewage as the highest priority. They felt this initiative provided the most impact on overall carbon emissions and was good value for money. (PR24-4)
- 70 per cent feel it is important that energy and water providers are helping to protect the environment and reducing their carbon footprint – and 37 per cent are willing to pay a little more to support these initiatives. (R16)

Emissions from Wastewater treatment works

- Customers living near sewage treatment works understand they are more likely to notice some impacts. Customers living near sludge sites generally view the impact on them as minimal; any odour, vehicle movement or noise issues were generally seen as infrequent and part of 'country life'. However, customers say they would find odour intolerable if it penetrates their home. An odour lasting for 8 hours starts to become problematic and a day or more is seen as intolerable. (PR19-7, PR19-13)
- Customers expect low levels of disruption as a minimum, such as hidden, well-maintained sites with respectful staff and contractors. They want Thames Water to take responsibility for any incidents that do happen. (PR19-7)

Engagement supporting the solutions

- No further testing has been undertaken on the proposed solutions to reduce emissions

Enhancement Insights

Customer Prioritisation

Enhancement Case: Reducing Carbon Emissions / Net Zero (1/2)

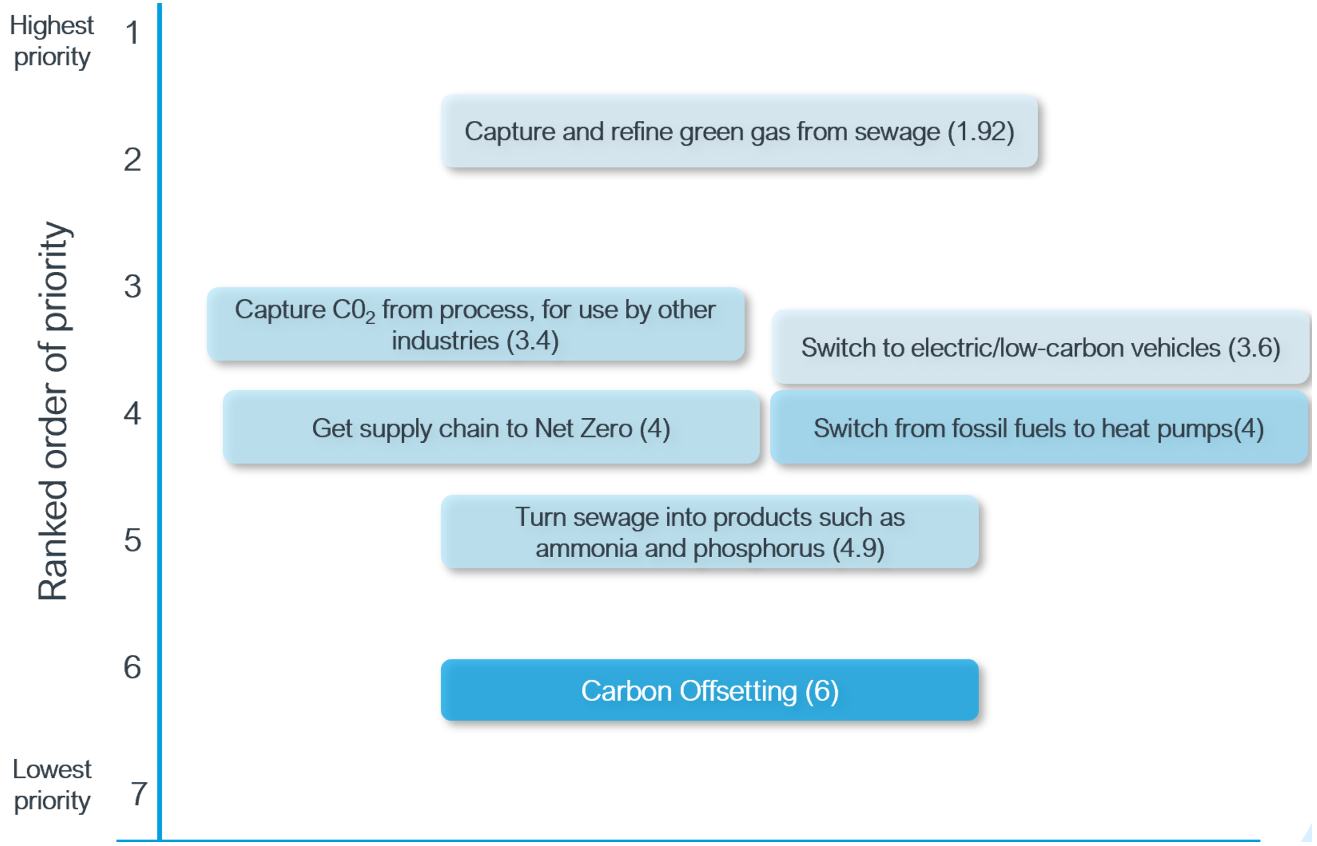
PR24 Deep Dives

Customers support our decarbonisation plan to achieve Net Zero by 2030 and feel that it delivers compelling value

Customers across all social, age and geographic categories supported most decarbonisation initiatives proposed by Thames Water.

When presented with our decarbonisation initiatives, 65% of customers strongly support Thames Water's decarbonisation plans. 33% of customers somewhat support the plan and only 2% somewhat reject the plan.

Customers ranked capturing and refining green gas from sewage as the highest priority. They felt this initiative provided the most impact on overall carbon emissions and was good value for money.



Q. Please rank the 7 aspects of the Thames Water Net Zero plan from the 1st - what you think is the most important thing for them to do - to the 7th the least important thing.

Enhancement Case: Reducing Carbon Emissions / Net Zero (2/2)

PR24 Deep Dives

Customers support our decarbonisation plan to achieve Net Zero by 2030 and feel that it delivers compelling value

Customers care about the environment, are broadly aware of climate change and try to live a lifestyle to minimise their impact on the environment. They support Thames Water's Net Zero commitments, with some customers favouring faster action.

Findings	Willingness to pay	Insights
Customers support Thames Water's decarbonisation plan and feel that it delivers compelling value.	Customers feel that £1.50 per year (£7.50 over 5 years) to support the decarbonisation initiatives needed to achieve operational Net Zero by 2030 is a worthwhile cost	Customers feel these costs are significantly less than expected. Some customers, particularly older customers, want more information about how the net zero initiatives will be delivered, but support is strong overall.
Customers most strongly supported capturing and refining green gas from sewerage, which would achieve 39% of the carbon saving required for Thames Water to reach net zero	Customers believed that the 90p added to bills for this each year would be very good value for money	Some customers supported increasing funding to see benefits sooner.

5. Demographic insights

Demographic insights relating to customer service

Different demographic groups prioritise different aspects of service areas

Customer	CS.1 I want an easy customer experience and tailored support
Age	Younger customers are more likely to engage with Thames Water than older customers. Older customers see fixing service issues the same day as both more important and urgent than younger customers. Older customers also see providing an inclusive and affordable service as a more urgent issue. (SP15, SP12) Future bill payers are generally less satisfied with a range of core service elements and are less likely to agree with brand values related to direct customer interactions: e.g. being friendly, helpful and easy to deal with (CX105)
Gender	There was no significant divergence in views observed on Customer Service between male and female customers.
Ethnicity	There was no significant divergence in views observed on Customer Service between customers of different ethnic backgrounds.
Disability within household	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. (CX27, CX32, SP15, PR24-2)
Region	Londoners view Thames Water providing a personalised service using the latest technology as significantly more urgent compared to Thames Valley customers. (SP15)

See Appendix A for list of sources

Demographic insights relating to affordability

Different demographic groups prioritise different aspects of service areas

Customer	AF1. I want fair and affordable bills
Age	Older customers see Thames Water providing value for money as both more important and urgent than younger customers. Older customers also see providing an inclusive and affordable service as a more urgent issue. (SP15, SP12) Younger customers are more likely to say they struggle to pay their bills, however, are less likely to qualify for a social tariff. (CX128)
Gender	Female customers generally tend to prioritise helping those who need it most, higher than male customers. 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. (SP15) Women are more likely to struggle to pay their water bill at least sometimes (PR24-17) and they are less likely to be aware of available financial support. (CX128) More generally, women are significantly more likely to be struggling to manage financially compared to men and, as such, are less likely to feel that future proposed bill increases will be affordable. (PR24-17)
Ethnicity	BAME customers see providing value for money as less important and less urgent as a priority compared to white customers. (SP15) BAME customers are more likely to say they struggle to pay their bills. (PR24-17)
Disability within household	Customers who are themselves disabled, or who live with someone who is disabled place a higher urgency on providing value for money. (CX27, CX32, SP15, PR24-2) They are also more likely to report struggling to pay their water bill and are more likely to qualify for a social tariff. They are more aware of available support for financially vulnerable customers. (CX128)
Region	Customers living in the Thames Valley are less likely to be aware of available support for vulnerable customers, less likely to report struggling to pay their water bill and less likely to qualify for a social tariff than customers living in London. (CX128)

See Appendix A for list of sources

Demographic insight relating to our water service

Different demographic groups prioritise different aspects of service areas

Customer	WT1. I want safe, high quality drinking water WT2. I want a reliable supply with minimal disruption
Environment	WT3. I want you to fix leaks and ensure there is enough water now and in the future
Age	Younger customers aged between 18 and 24 are more likely to take their water service for granted and less likely to take part in every day activities that contribute to reducing their consumption (CX87). Older customers hold a greater weight on delivering essential services and tend to be more critical in tone towards Thames Water's service. They also put a greater emphasis on motivating customers to adopt efficient appliances and digital tools to save water and reduce waste. Customers over the age of 35 placed significantly higher importance and urgency on all water service areas compared to customers under the age of 35, with the exception of supporting customers to reduce their consumption, for which scores were similar across both groups. Future bill payers generally express a preference for rapid increase investment in solutions which will go further and quicker to address issues, such as investment in infrastructure to reduce risks to supply or mains replacement to reduce risk of basements flooding. Future bill payers also place a higher priority on Thames Water making improvements to providing alternative supplies of water in an emergency. (SP15, PR24-11, SP12, SP14, PR24-15)
Gender	Women tend to be less tolerant to supply interruptions and place significantly more importance and urgency than men on guaranteeing high quality drinking water. Women place higher importance on supporting customers to reduce their consumption and securing sufficient supply in the future without damaging the environment. Men place a lower emphasis on protecting services against climate change than women. Men are significantly more likely to deem security and emergency measures directions presented by Thames Water as very important. (SP15, SP12, PR24-15)
Ethnicity	White customers place a greater emphasis on delivering essential services, placing a higher importance and urgency on a number of water service areas than BAME customers, specifically securing sufficient supply into the future without damaging the environment. Customers from BAME backgrounds place less urgency on replacing lead pipes and reducing leakage than white customers. (SP15, SP12, SP14)
Disability within household	Customers who are themselves disabled, or who live with someone who is disabled, have a lower tolerance to supply interruptions than customers from households where nobody is disabled. The duration of supply interruptions is also more of an important issue to this group, who want Thames Water to more urgently guarantee an uninterrupted service, as well as high quality drinking water. (SP6, SP12)
Region	Customers living in the Thames Valley & Home Counties place a higher importance on guaranteeing high quality drinking water compared to those living in London. Customers in London want Thames Water to support customers to reduce their consumption more urgently than customers from the Thames Valley & Home Counties. Customers in Thames Valley & Home Counties place greater weight on environmental factors such as sustainable supply. (SP12) There were increased concerns around the quality of water in larger cities e.g. London and Reading. (CX113) Thames Valley & Home Counties customers gave significantly higher priority scores for looking after every drop of water. (SP15)

See Appendix A for list of sources

Demographic insight relating to our wastewater service

Different demographic groups prioritise different aspects of service areas

Customer	WS1. I want you to prevent sewer flooding and take waste away safely
Environment	WS2. I want you to stop polluting rivers and to improve their quality WS3. I want you to reduce emissions and reach net zero

Age	Older customers place a greater weight on delivering essential services and tend to be more critical in tone towards Thames Water's service. Customers over the age of 35 placed significantly higher importance and urgency on all wastewater service areas compared to customers under the age of 35. (SP15, PR24-11, SP12) Older customers tend to place a greater emphasis on the importance of keeping rivers clean. Customers of all ages provided similar scores for the importance and urgency of Thames Water producing its own green energy. (SP15, SP12) Older customers (65+) are significantly more likely to see the issues of groundwater sewer infiltration and sewer flooding as very important and urgent to address than younger customers and future bill payers. (PR24-15)
Gender	Men place a lower emphasis on protecting services against climate change than women (SP15). Men tend to place less emphasis on getting more energy from renewable sources and tend to see the improvement of the environment and clean-up of rivers as less urgent than women. Women saw Thames Water becoming a major producer of green energy using multiple technologies as both significantly more important and urgent compared to men. Women place significantly higher importance and urgency achieving net zero compared to men. (SP15, SP12) Men are more likely to place a high urgency eliminating sewer flooding by 2040. (PR24-15)
Ethnicity	White customers place a greater emphasis on delivering essential services, placing a higher importance and urgency on a number of wastewater service areas than BAME customers, specifically eradicating sewer flooding into properties. Customers from BAME backgrounds place less urgency on preventing disruptive rainwater flooding than white customers. (SP15, SP12, SP14) White customers place a greater emphasis on delivering essential wastewater services without harming the environment, placing a higher importance and urgency on discharge of untreated sewage into rivers and place a greater emphasis on keeping rivers clean than customers from BAME groups. (SP12, SP15)
Disability within household	There was no significant divergence in views observed on Wastewater between customers with or without disabilities
Region	Customers living in the Thames Valley & Home Counties place a higher importance on eradicating sewer flooding into property and discharges of untreated sewage into rivers, compared to those living in London. (SP12) Customers in Thames Valley & Home Counties place greater weight on environmental factors such as keeping rivers clean and healthy. Customers living in the Thames Valley & Home Counties place a higher importance on eradicating discharges of untreated sewage into rivers, compared to those living in London. (SP12, SP15) Awareness and concern around river health has grown enormously over the last few years amongst stakeholders in all regions, but focussed especially in North Thames Valley. Stakeholders highlighted that flooding issues becoming more prominent across whole of western region (Thames Valley) in same areas as previous wet winters (S38)

See Appendix A for list of sources

Demographic insight relating to being part of the community

Different demographic groups prioritise different aspects of service areas

Communities	CI1. I want you to have a positive impact on the community
Age	Brand advocacy tends to be higher amongst younger customers. Older customers place a significantly greater weight on helping those who need it most as well as keeping our people safe and well, compared to younger customers. Younger customers see the delivery of property-related projects as less important than older customers. (CX22-24, CX62, CX89, SP15, SP12) Future bill payers are significantly less likely to think that Thames Water only care about profits. (CX113)
Gender	Men appear to be less responsive to Thames Water communications. Women place significantly higher importance on creating local employment opportunities and providing sites for recreation. (CX22-24, CX89, CX62, SP12)
Ethnicity	BAME customers prioritise bringing communities together and helping local economies thrive more so than white customers. White customers see the delivery of property-related projects as less urgent compared to BAME customers. (SP15)
Disability within household	Brand advocacy tends to be lower amongst customers who are themselves disabled, or live with someone who is disabled. (CX22-24, CX62, CX89)
Region	Londoners appear to place greater weight on bringing communities together, and also issues around noise and transport. Londoners also place a higher urgency on creating attractive and diverse employment opportunities and providing access to sites for recreation. They also place both higher importance and urgency on delivery of property-related projects. (SP15, SP12)

See Appendix A for list of sources

6. Segments - Detailed insights

Key segmented customer insights

Different groups within our customer base have different service relationships with us and different needs & expectations. High-level differences between four smaller segments and the larger overall household segment are summarised below:

Household

Vulnerable customers:

- Have different perspectives on our service or require greater levels of support and more personalised communication (see detailed insights for vulnerable customers)

Future bill payers:

- Generally less engaged with us and our operations, but concerned about issues relating to the environment (see detailed insights for future bill payers)

Non-household

Businesses:

- Particularly concerned about service failures as these potentially cost them loss of trade and customers (see detailed insights for business customers)

Retailers:

- Concerned with any aspect that impacts billing of their non-household end-consumers (see detailed insights for retailers)

Developers

- Would like a consistent one-to-one relationship with us, to overcome problems and delays that occur for the different processes (see detailed insights for developers)

There is a high level of consistency in views across the region. There are some variations between different areas but no clear pattern emerges. Differences may be explained by a combination of social, economic and demographic factors. We highlight any differences in view across key demographics in Section 5.

Stakeholder views

Stakeholders and communities

What Stakeholders and Communities Want

For Customers	
CS1. I want an easy customer experience and tailored support	Stakeholders want sufficient notice for planned work and information on length/severity of disruption. They want engaging and reliable communication for impactful unplanned incidents.
AF1. I want fair and affordable bills	Stakeholders expect Thames Water to raise awareness of social tariffs and priority services with eligible customers. They believe the needs of elderly people are becoming more acute; future Priority Services Register sign up targets and services will become even more important
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	Stakeholders are particularly concerned around ensuring the water and wastewater network can cope with increasing pressure from population growth and climate change, both now and in the long-term. They want to see Thames Water do this through continued, proactive investment in infrastructure and new sustainable strategic water supply arrangements and wastewater solutions (rather than having to fix issues after they have occurred), whilst improving the core service, operating the kit they currently have effectively and efficiently. Stakeholders are supportive of a proactive mains replacement programme but want to see Thames Water ensure minimised disruption and improved collaboration efforts. There is greater concern across stakeholder groups on the frequency of damaging water events (mainly sewage spills & flooding) and as a result, increased worry that reactive actions are simply not enough.

For Communities	
CI1. I want you to have a positive impact on the community	Stakeholders expect stable leadership that engages effectively with stakeholders and communities, and want Thames Water to do more to benefit society for the long term. They want proactive communication from us on community initiatives and educational programmes on water saving.

For 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	Stakeholders want Thames Water to go further and 'remove' rather than 'reduce' the strain on rivers and want Thames Water to work collaboratively where it helps to achieve this. Stakeholders support the sector's 2030 net zero ambitions, but see potential to go beyond this.

Stakeholder views

Stakeholders and communities – detailed insights (1/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights
Maintaining infrastructure	Stakeholders see Thames Water as reliable in providing the vital service of water and most stakeholders acknowledge that 99% of the time water provision and waste management works well and is out of sight and out of mind. They recognise that is a feat considering everything involved. Despite the consistently negative news coverage, stakeholders know that Thames Water is doing well most of the time and will only make the news when something goes wrong (S14)
Reducing leakage	Stakeholders from Local Government want Thames Water to operate the kit they have effectively and efficiently rather than investing in new technology. (S18)
Resilience of the network to future hazards	Stakeholders encourage Thames Water to ensure that their plans can cope with a range of conditions/scenarios, such as flooding and freeze-thaw. Stakeholders want to see Thames Water tackling climate change in our next business plan. (S8) Stakeholders want more clarity on how the water industry plans to address the impacts of climate change, population growth and rising costs of living and pointed out water is a precious resource which needs to be protected. (S14, S19) It is widely accepted by stakeholders that climate change will have serious implications for the long-term sustainability of the water and sewerage sectors. There is concern that there is no unified industry plan to mitigate these effects. (S39) Stakeholders largely agree that communications around the hosepipe ban and water scarcity were handled poorly, and they were often obligated to rectify the lack of explanation or support provided to affected customers. (S39)
Water efficiency and reducing consumption	Household water use is a primary cause for concern for a large range of industry stakeholders; water companies & retailers, regulators/government, consumer representatives, business trade bodies, and NGOs. 98.2% of participants in the Waterwise Water Efficiency Strategy Consultation thought that increased water efficiency is a legitimate response to the threat of water scarcity and 96.3% of participants thought that Thames Water is not doing enough at the moment to mitigate the threat of water scarcity (S3) Smart Metering programme now being rolled out. Stakeholders understand reasoning but concerns during cost of living crisis (S8)

Key Sources

Insight Sources v18:
S39 Thames Water Stakeholder Research Report, March 2023

Insight Sources pre-v17:
S14 Stakeholder Reputation Research, March 2022
S18 Research Summary Form – Local Government
S19 Research Summary Form – Insurance stakeholders, May 2022
S3 Water efficiency strategy research, July 21

Pre-2020 Insight Sources:
S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholders and communities – detailed insights (2/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Ensuring a resilient supply of water	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 (S8) Both the Greater London Authority (GLA) and London First (a non-profit organisation campaigning to tackle current challenges and secure the future of the city) were supportive of a proactive mains replacement programme and believe this aligns with their objectives, but want to see more on how Thames Water is mitigating traffic disruption. (S11, S12) While acknowledging disruption is unavoidable, the GLA wants to see Thames Water better show what it is doing to minimise disruption and explore the potential role of innovation within this. (S9, S11) The GLA and London First also highlighted the opportunity for collaborative opportunities to minimise disruption, for example the electrification of London roads. (S11, S12) Recent trunk mains bursts in London has triggered a huge amount of stakeholder interest, especially in the vicinity of the burst. They were kept updated throughout the incident but now want details on investment in the area. (S38) Stakeholders deem the country's water infrastructure not fit-for-purpose for a growing population, especially in London, and there is demand that the system is proactively invested in rather than applying patchwork fixes retroactively. (S39) Stakeholders have expressed concerns around water scarcity after the hosepipe ban in summer 2022 have grown, exacerbated by reports of water lost from leakage incidents. There are now questions about whether the water supply is being managed in a responsible, sustainable way. Related negative stories are consistently and spontaneously mentioned by stakeholders. (S39) With demand for new housing and increasing bouts of extreme weather, stakeholders want proactive solutions to these issues before it's cataclysmic. (S39)	Insight Sources v18: S38 Elected representative Issues Tracker Q1 2023, 2023 S39 Thames Water Stakeholder Research Report, March 2023 Insight Sources pre-v17: S9 Research Summary Form – PR24 GLA Sessions, March 2022 S11 GLA PR24 Feedback Form (Water), March 2022 S12 Research Summary Form – PR24 London First Sessions, March 2022 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (3/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Reducing abstraction from rivers and groundwater	Stakeholders also encourage and support measures (e.g. reservoirs, reducing consumption etc.) to reduce abstraction of water from rivers, particularly those supporting rare or sensitive habitats and ecosystems, despite increasing demand caused by population growth and climate change. (S8) Stakeholders from Local Government and community groups want Thames Water to go further and 'remove' rather than 'reduce' the strain on rivers and want Thames Water to work collaboratively where it helps to achieve this. (S18, S20) Environmental NGOs welcome targets to reduce pollution incidents but want constructed wetlands progressed also. Environmental NGOs are pleased if Thames Water can deliver the Water Industry National Environment Programme (WINEP) improvements for less than plan costs. (S8)	Insight Sources pre-v17: S18 Research Summary Form – Local Government S20 Research Summary Form – Communities impacted by Capital Delivery, June 2022 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (4/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Maintaining infrastructure and preventing blockages	Stakeholders acknowledge that 99% of the time waste management works well and is out of sight and out of mind. They recognise that is a feat considering everything involved. Despite the consistently negative news coverage, stakeholders know that Thames Water is doing well most of the time and will only make the news when something goes wrong. However, the prime concern across stakeholder groups is frequency of damaging water events, mainly sewage spills and flooding. Although many recognise the industry responds quickly to fix immediate problems there is worry that these reactive actions are simply not enough (S14) Stakeholders also highlight the importance of working with children to convey messages about issues such as water efficiency and sewer abuse and embed behaviour change. Stakeholders suggest that we do more to work with partners to support us in conveying messages on issues of genuine common cause. (S8)	Insight Sources pre-v17: S14 Stakeholder Reputation Research, March 2022 S18 Research Summary Form - Local Government, June 2022 S1 Stakeholder Asks, February 2022 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019
Resilient wastewater infrastructure	Stakeholders see Thames Water working hard to progress but see development of infrastructure as a key long-term challenge. When pollution or flooding incidents occur, they are likely to gain greater traction in the media impacting Thames Water's stakeholder reputation and the level of understanding from customers. Some stakeholders, especially MPs, are aware of the challenging context of addressing ageing Victorian infrastructure and the high costs of investment and are therefore less critical of the sector, however, most are unsympathetic to the perceived lack of progress Thames Water has made on this in recent years. (S14) Regulators think the whole industry needs to take on greater responsibility for their investments and key assets. (S14) Local authorities want Thames Water to ensure a constant and safe supply of water and wastewater services today and in the future by operating the assets you have effectively and efficiently, ensuring assets work as they are intended, and where required investing in new assets and processes to ensure services can continue to be delivered (S18) Stakeholders consider that the risk of flooding from rainfall will likely increase and is seen as unpredictable and out of Thames Water's control. Nonetheless it is considered a high priority to plan for due to the distressing nature of sewer flooding. (S1) Stakeholders encourage us to be ambitious in our investment in infrastructure to ensure resilience against more extreme weather, and want to continue engaging with us to identify opportunities which developments will have on our wastewater resilience plan. (S1, S8)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (5/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights
Sewer flooding	Flood prevention remains a high-priority for many stakeholders in London. Most now understand this is the responsibility of many organisations but there is still a focus on what Thames Water is doing to protect customers. (S38) Stakeholders highlighting that flooding issues becoming more prominent across whole of western region (Thames Valley) in same areas as previous wet winters. (S38) Stakeholders provided feedback towards the sewer flooding targets in the DWMP. They are concerned that the defined property protection up to a 1 in 50-year storm is not ambitious enough. (SP20) Stakeholders expressed that with more frequent and intense storms, Thames Water should be considering higher return period events, however stakeholders highlighted that adjusting the targets to higher return periods would increase the cost of the plan, which would be a concern. (SP20)
Increasing use and generation of renewables and reducing emissions	Stakeholders support water companies' regional planning intention on the achievement of Net Zero as soon as possible. The regional plan builds on the water industry Routemap 2030, and they welcome the sector being a leader in this space (S7) Regulators wanted to see Thames Water position themselves as as a leader when it comes to innovation (i.e. green energy) and pushing the sector forward. (S39) Stakeholders provided feedback towards the solutions and delivery plan proposed in the dDWMP, and indicated that there should be greater emphasis on carbon neutrality and nature recovery support. (SP20)
Improve the quality of rivers and waterways	NGOs particularly respect and admire the continued commitment Thames Water has to the water courses and local natural environment of which it is the custodian (S14) NGO stakeholders with interest in environmental matters see areas of improvement in Thames Water's record on pollution incidents and wider concerns around the health of English rivers (S39)

Key Sources

Insight Sources v18:
S38 Elected representative Issues Tracker Q1 2023, 2023
SP20 DWMP Consultation Response – You said we did. February 2023
S39 Thames Water Stakeholder Research Report, March 2023

Insight Sources v16:
S14 Stakeholder Reputation Research, March 2022

Insight Sources v15:
S7 Blueprint for Water Insights, July 2021

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (6/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Pollution incidents	Stakeholders see sustainability and environmental protection as a key long-term challenge. Attitudes towards water companies are either neutral or negative. Pollution incidents undermine initiatives and progress made by the sector. Water pollution is a main concern and there are doubts that water companies take their responsibility to protect the natural environment seriously enough (S14) Awareness and concern around river health has grown enormously over the last few years amongst stakeholders in all regions, but focussed especially in North Thames Valley. (S38) River contamination incidents have become a predominant, mainstream concern following sustained, high-profile media coverage. Stakeholders point out that the public is now hyper aware of the issue and tracking progress more closely. Related negative stories are consistently and spontaneously mentioned by stakeholders. (S39) While Thames Water's near-live map of storm overflow spills highlights the extent of pollution issues, stakeholders are impressed at the level of detail even in low performing areas and access Thames Water is allowing to their operations. (S39) Along with communicating on broader strategy, proof-points such as the real-time map provide an opportunity for stakeholders to measure progress, and engenders trust. Thames Water should sustain this transparency around data-sharing to demonstrate where performance has improved and action has been taken. (S39) Regulators provided feedback regarding the storm overflow targets defined in the DWMP plan and indicated that the DWMP would be improved by including a constrained profile which shows milestones and prioritisation, to provide evidence on the cost for these storm overflow schemes. (SP20) Regulators also said a new scenario is required in the programme appraisal to show the impact of undertaking water quality monitoring of sewer overflows. (SP20) Stakeholders indicated that a 2050 target of 10 spills per storm overflow per annum is not ambitious enough, and both stakeholders and regulators indicated that storm overflows which impact the most sensitive catchments and/or overflows that discharge greatest volumes and caused the most pollution, should be identified, prioritised and targeted early in the programme. (SP20) The regulators requested for detail around how improved monitoring, including EDM and continuous water quality of outfalls, will inform adaptive pathways. (SP20) Stakeholders provided feedback towards the solutions and delivery plan proposed in the dDWMP, and indicated that there should be more references to Agriculture and farming benefits e.g., to store and slow flows across agricultural land (SP20)	Insight Sources v18: S38 Elected representative Issues Tracker Q1 2023, 2023 SP20 DWMP Consultation Response – You said we did. February 2023 S39 Thames Water Stakeholder Research Report, March 2023 Insight Sources v16: S14 Stakeholder Reputation Research, March 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (7/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Sustainable wastewater solutions and future infrastructure projects (1/2)	Stakeholders also support the extension of investment in green infrastructure and sustainable drainage to reduce flooding and provide biodiversity, recreation and water quality benefits. (S8) Stakeholders in community groups impacted by capital delivery and major projects want Thames Water to ensure a constant and safe supply of water and wastewater services today and in the future by firstly operating the existing assets effectively and efficiently, ensuring assets work as they are intended, and then where required investing in new assets and processes to ensure services can continue to be delivered. (S20) Majority (>60%) of customers and stakeholders agree with preferred Drainage & Waste Management Plan, which includes nature based solutions and use of latest technology to increase sewer system capacity. Stakeholders that were not supportive of the plan, felt that Thames Water should review the balance between the different plans put forward, and that more immediate action is required with regards to when solutions are delivered. (SP20) Regulators wanted greater clarity around how Sustainable Drainage Systems (SuDS) are being valued, to better demonstrate what is best value. The Environment Agency said, "the plan should contain more detail within options appraisal regarding the assumptions employed that underpin the justification for the scale of the SuDS options." (SP20) Stakeholders and regulators provided feedback as to how the options appraisal process could be adapted: • Prioritising catchment wide and nature-based solutions over traditional engineering approaches. • Prioritisation should include sensitive areas of groundwater alongside rivers and wetlands. (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You said we did. February 2023 Insight Sources pre-v17: S20 Research Summary Form – Communities impacted by Capital Delivery, June 2022 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (8/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Sustainable wastewater solutions and future infrastructure projects (1/2)	**Stakeholders and regulator comment on the SuDS plan (SP20):** The DWMP includes a marked step change in the delivery of SuDS compared to our previous level of SuDS delivery. The plan could include more detail on how this change will be achieved and how the number of opportunities required to meet the DWMP targets will be identified. There is insufficient information to give confidence that the scale of roll out adopted within the preferred plan approach will be achievable and the impact it may have on the delivery of the DWMP goals if it is not. Some stakeholders suggested loading the plan more evenly to achieve more SuDS in earlier years of the plan. There is concern around land availability in London where SuDS have been prioritised as a strategy for mitigating pressure on the sewers. Challenges regarding the ownership and maintenance of SuDS were flagged by many as a potential issue for future management of a network which includes more SuDS. The Environment Agency said “It is important that the right blend is set out within the plan to ensure that at future Price Review / AMP / WINEP cycles funding is best aligned to the right programmes. Our experience with PR19 is that the shift of funding from direct property alleviation to generic SuDS roll out has had a detrimental impact on our ability to collaborate with you. The proposed ‘go steady’ delivery approach risks an environment where, should it not be achievable at the scale anticipated, a significant shift in approach could be required at a late stage within the DWMP, putting the goals at risk. Thames Water should increase funding beyond £5m to develop SuDS schemes that achieve the delivery aspirations in the plan.	**Insight Sources v18:** SP20 DWMP Consultation Response – You said we did. February 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (9/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Planning the future wastewater system	Regulators asked Thames Water to provide more granularity in how targets have been applied in the plan for areas inside and outside of London. They also wanted groundwater to be included as a risk/planning objective to provide focus. (SP20) Stakeholders expressed that the targets set in the plan should be SMART, i.e., specific, measurable, achievable, relevant, and time-bound; and, in particular, that they should be broken down into interim targets, against which progress could be monitored. Regulators indicated that there was a lack of clarity around activities and milestone targets within the short, medium, and long term timelines. (SP20) Regulators expressed that the adaptive planning approach should be applied to all areas of the plan or use Ofwat's common reference scenarios as defined in the Long-Term Strategy Document Guidance. They also indicated testing should be completed to evidence how the plan will adapt to future influencing factors like climate change. (SP20) The regulators also expect Thames Water to include asset resilience (now and in the future) to fluvial and coastal flooding, as well as power failure. (SP20) Regulators raised concerns that the dDWMP had insufficient and unconvincing evidence for Thames Water's PR24 investment cases. They also highlighted that Thames Water's goals will require significant changes to the way flood risk is managed and the mechanisms behind how projects are funded today. (SP20) Regulators would like to see a high-level road map for how to ensure future Price Reviews / AMP / WINEP cycles create the right funding environment to ensure the right projects receive funding. (SP20) Regulators felt that there was no evidence of joint thinking with Thames Water's clean-water business in respect to the groundwater environment or WINEP investigations and catchment schemes. (SP20) Regulators indicated that more evidence should be provided around the costs and benefits of solutions, in particular with schemes delivering multiple benefits. Regulators also wanted evidence explaining why alternative options were discounted. (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You said we did. February 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (10/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Quick resolution of service issues	Stakeholders indicated that they are particularly quick to address the situation and support communities when an incident occurred. Whilst the general increased speed and tone of responses is noted the occasionally slow response time or lack of any response from Thames continues to be a frustration for stakeholders, especially for those with a lower profile such as Councillors or small-scale NGOs. (S14) Stakeholders are reliant on Thames Water maintaining good customer service levels and investing to improve the network. MPs and LGAs who continually deal with complaints from their constituents/wards are much less sympathetic to missteps. (S39) There are still concerns over an emerging two-tier communication system wherein issues are only dealt with once escalated to the relevant stakeholders. However less so than in the 2021 research. (S39)	Insight Sources v18: S38 Elected representative Issues Tracker Q1 2023, 2023 S39 Thames Water Stakeholder Research Report, March 2023 Insight Sources pre-v17: S14 Stakeholder Reputation Research. March 2022
Response to interruptions	Local authorities / MPs prefer when queries and issues are resolved quickly and efficiently upon reporting so they don't have to chase for information or action, or having the issue dealt with only once escalated to the MP contacting Thames Water directly. (S14) Stakeholders and customers in London and Thames Valley both report dissatisfaction with the level of communication for both planned and emergency work. Strong request for more info and details on upcoming and ongoing works. More info at our sites and on our boards, eg – we are aware of this and are working on it. Timeline info would be very helpful. Customers have also reported a lack of available info during incidents when contacting the call centre. (S38) The biggest concern is from political representatives on the lack of responsiveness and proactive engagement around more localised and often repeat incidents (i.e. a burst water pipe causing damage). MPs and local councilors would appreciate more direct contacts and regular dialogue around progress being made to the network, and to their constituency/ward. (S39)	

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (11/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Priority services register	Stakeholders have raised that the needs of elderly people are becoming more acute; future Priority Services Register sign up targets and services will become even more important. (S8) NGOs in customer protection see areas for improvement Ensure there are channels for NGO stakeholders to escalate issues as and when they are helping a vulnerable customer. (S39) NGO stakeholders continue to score Thames Water the most favourably among the different audiences. For NGOs who specialised in customer protection, this was due to a greater focus being afforded to targeting customers in vulnerable circumstances and collaborations with third parties such as citizen advisory organisations and NGOs. This was also spontaneously brought up by regulator/decision maker and LGA stakeholders. (S39) NGO stakeholders continue to score Thames Water the most favourably among the different audiences. For NGOs who specialised in customer protection, this was due to steps taken by Thames Water to establish a shared priority register list with other organisations. (S39) Stakeholders speak positively of Thames Water's increased focus and collaborations to target customers in vulnerable circumstances. (S39)	**Insight Sources v18:** S39 Thames Water Stakeholder Research Report, March 2023 Pre-2020 Insight Sources: S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholders and communities – detailed insights (12/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Awareness of social tariffs	Stakeholders representing vulnerable customers expect us to raise awareness of our social tariff and the Priority Services Register for those who could be eligible. (S8) NGOs in customer protection highlight that, against a backdrop of increasing household costs, Thames Water has a great opportunity to better communicate their financial support schemes. (S39)	Insight Sources v18: S39 Thames Water Stakeholder Research Report, March 2023 Pre-2020 Insight Sources S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key	
Robustness of evidence	Low
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholders and communities – detailed insights (13/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights
Corporate social responsibility	NGOs think that Thames Water could and should do more to promote their contributions to local initiatives. Although financial support is naturally important to these organisations, many point to their consistent commitment and presence as a reason for Thames Water being a notable partner. (S14)
Investing in communities	NGOs view Thames Water's local initiatives and outreach programmes as a highlight because it directly recognises local communities, especially in more rural areas. However, others feel expectations are high due to the size of Thames Water (i.e. their capacity and ability to make substantial changes above all water companies) with varying tangible success. Progress made on a local level through initiatives, outreach and incident response may be undervalued due to the overarching feeling that there is a lack of investment in certain areas compared to others. (S14) Stakeholders expect Thames Water to do more to inform customers about the importance of water and its scarcity to help motivate greater public focus on the need to use water wisely now and in the future. Customers support moving from treating customers as passive recipients of the service to active participants in the water cycle. (S8, S7, S14) NGO stakeholders with interest in environmental matters praise Thames Water specifically for Repurposing Thames Water's land to be of benefit to local communities and the environment. (S39)
Biodiversity	NGO stakeholders with interest in environmental matters praise Thames Water specifically for the specialist knowledge of Thames Water's ecological teams. (S39)
Ownership and profits	Stakeholders are concerned with the regular turn over of leadership, particularly strong among NGOs. Some point to difficultly in creating lasting relationships with Thames Water's leadership team (S8, S7) Stakeholders highlighted how renumeration and profit-making in the utilities sector have garnered more attention amidst the cost-of-living crisis. The water industry in particular has faced increased criticism around executive pay considering the uptick in sewage incidents and leakages. Related negative stories are consistently and spontaneously mentioned by stakeholders. (S39) MPs highlighted concerns around profiteering considering the recent coverage around executive pay amidst continued local and network wide incidents and failures. (S39)

Key Sources

Insight Sources v18:
S39 Thames Water Stakeholder Research Report, March 2023

Insight Sources pre-v17:
S14 Stakeholder Reputation Research. March 2022
S7 Blueprint for Water Insights, July 2021

Pre-2020 Insight Sources:
S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholders and communities – detailed insights (14/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Transparency	Stakeholders express a desire to hear even more proactive communication around future planning, including acknowledging these existential threats and offering potential solutions. They have expressed concerns around a lack of clear future planning, and some suspect that due to privatised nature, Thames Water are less transparent about investments or priorities. As a result, stakeholders want Thames Water to be more forthcoming with information and planning. (S14) Going forward, MPs are particularly interested in Thames Water improving on these areas: Proactively sharing data and concrete proof points that showcase Thames Water's progress in local areas and across the network as a whole. (S39) Regulators again give the lowest reputational score among audiences but highlight some positive moves Taking the initiative to increase transparency by sharing data sets that allow real-time and in-depth access to operations. (S39) Stakeholders spontaneously note that Thames Water has been more transparent in terms of sharing data, openly acknowledging performance issues and discussing challenges within the sector in the past year. (S39) These stakeholders also report higher respect for Thames Water due to the challenging environment it operates within, and its transparency and openness in addressing legacy issues compared to other companies. (S39) Stakeholders and regulators indicated that the plan's impact on bills is important to understand, and regulators asked for Thames Water to demonstrate how the preferred plan is the best value for money, in the long term compared to other plans. Regulators also asked Thames Water to provide information about how future risk will be addressed through business-as-usual activities (base funding) or through enhancement funding. (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You said we did. February 2023 S39 Thames Water Stakeholder Research Report, March 2023 Insight Sources pre-v17: S14 Stakeholder Reputation Research. March 2022

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (15/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Trust and perception of Thames Water and the wider sector	Numerous scandals including the discharge of sewage into water sources and the awarding of bonuses are perceived to have shaken wider trust in the sector. (S39) Stakeholders rarely differentiate between the different water companies and scrutiny is – often but not always – applied more to the sector rather than individual actors. However, as the largest and one of the most recognisable water companies, Thames Water is often perceived to be the embodiment of the sector's ills. (S39) Stakeholders do not simply parrot back media headlines in their assessment of the water industry. They tend to know more details than the general public about complex issues such as storm overflows and the realistic capabilities of water companies to make change. (S39) There is a recognition that water companies will struggle with negative media attention, whether fairly or unfairly. For this reason, stakeholders tend to hold a more nuanced perspective about the industry's performance. (S39) stakeholders remain highly concerned about the issues facing the water industry and still have expectations for companies to progress. This is especially heightened due to a perceived lack of dialogue between water companies and the public. (S39) Most stakeholders are neutral towards Thames Water when it comes to both reputation and respect which is consistent with previous years. Negative media attention has had less impact on stakeholder's reputational assessment of Thames Water than the general public and respect generally relates to the personal respect stakeholders hold for Thames Water due to their operational challenge and the quality of their personnel. (S39) Stakeholders are positive towards Thames Water insofar as it delivers its day-to-day core service of providing clean water and managing wastewater to a high standard. It also plays an active role in communities through engagement and is seen to have increased its focus on targeting vulnerable customers. However, stakeholders struggle to award Thames Water with scores over 3 given the prolific failures to address water pollution, increasing leakage issues and a perceived negativity from the general public. Stakeholders are losing the benefit of the doubt they had in previous waves that Thames Water is investing in these areas, and are asking for tangible evidence. (S39)	Insight Sources v18: S39 Thames Water Stakeholder Research Report, March 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (16/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Trust and perceptions of Thames Water and the water sector (2/2)	Going forward, MPs want Thames Water to prevent large scale flooding or sewage spill incidents that cause immense damage in local areas. (S39) There are clear areas where these stakeholders would like to see improvement Empirically, Thames Water is one of the lowest performers on many measures compared to other water companies and that has to change to improve its reputation. Thames Water should Shout about the good initiatives, even if they are hyper-localised, to help balance the overwhelmingly negative press coverage. (S39) Stakeholders across all groups are quick to recognise that Thames Water operates in uniquely challenging context with ageing Victorian infrastructure. However, stakeholders who represent customers are becoming increasingly unsympathetic as they continually contend with reoccurring leakage and flooding issues in local areas. (S39) Environmental concerns are top of mind for stakeholders with increased data and media coverage demonstrating it is a chronic issue for the industry - while not a unique challenge to Thames Water, there is a perception among most that the company is a relatively bad offender. (S39) Regulators/ Decision makers and NGOs attribute much of their positivity and trust in Thames Water to the quality and expertise of its staff. (S39) Most stakeholders agree that Thames Water is headed in the right direction, however, across the audiences are critical of the pace of change. While many acknowledge regulatory and budget constraints, overall sympathy is waning. The reality of the size and age of the infrastructure is an immense challenge, but some stakeholders think Thames Water should have been tackling this years ago, and so are reticent to accept that as a reason for not acting effectively. Also, public scrutiny towards water companies is growing which increases the pressure on political and regulatory representatives. (S39) Stakeholders prioritise Thames Water getting the basics right first i.e. service areas; followed by helping those who need it, and improving experience and engagement with customers. Bringing social value to communities is important, but behind core service provision and finally, although an exciting prospect to stakeholders, green energy took lesser priority than immediate environmental concerns around water. (S39)	Insight Sources v18: S39 Thames Water Stakeholder Research Report, March 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholder views

Stakeholders and communities – detailed insights (17/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Relationship with stakeholders	NGO stakeholders continue to score Thames Water the most favourably among the different audiences. For NGOs who specialised in customer protection, this was due to the commitment and expertise of their counterparts at Thames Water, and willingness to collaborate and listen. (S39) NGOs in customer protection see areas for improvements in Close partnership and engagement is not felt across the board, and some NGOs want a better relationship with Thames Water. (S39) Environmental NGOs praise Thames Water specifically for Continued collaboration and commitment to supporting NGOs. However, they would like to see the following improvements: • Gain a better understanding how, as a large corporation, to partner with the charitable sector more effectively. Some report feeling that their communications and requests are too burdensome • Many would appreciate greater responsiveness, and clarity around timescales when it comes to nature projects • Often describe Thames Water as a “black box” where requests disappear and are not responded too. (S39) There has been a slight increase in Local Government Authorities' reputational assessment of Thames Water, which is predicated on Improved engagement and collaboration with councils, including more regular meetings; a better understanding of Thames Water’s strategic thinking and plans for future development; and reliable service provision, where access to water and removal of wastewater is usually not a concern. (S39) LGAs want to see improvements in responsiveness to queries, the one contact assigned for all councils is perceived to be overstretched; leakages and flooding are frustrating when they occur, and councillors want to see investment in the network to prevent repeat incidents; and improving dialogue with the general public, especially around water scarcity and drought warnings. (S39) The negative trend around MP’s reputational assessment of Thames Water has continued, mainly fueled by the increased number of severe pollution and leakage incidents negatively impacting their constituents and local areas; Sporadic levels of engagement from Thames Water both in terms of frequency and whether it is proactive or reactive; and A sense that larger issue areas that MPs champion and constituents focus on are not being factored well enough into Thames Water’s long-term strategies. (S39) Regulators think Thames Water should improve prioritisation processes when it comes to investment then clearly support those decisions with data. (S39)	**Insight Sources v18:** S39 Thames Water Stakeholder Research Report, March 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Stakeholders and communities – detailed insights (18/18)

What Stakeholders and Communities Want

Sub-topic	Detailed Insights	Key Sources
Trust and perceptions of Thames Water and the water sector	Regulators indicated that Thames Water should provide clarity on the likelihood of delivering partnership schemes in the future and the potential scale of co-funded delivery. (SP20) Going forward, MPs are particularly interested in Thames Water improving on these areas: Building direct, two-way communication channels with the public that help to ease any concerns around water supply. (S39) Regulators again give the lowest reputational score among audiences but highlight some positive moves day-to-day relations with Thames Water: staff are broadly lauded for the professionalism and openness, there is recognition that staff and leadership are working hard; and providing clarity with regulators around strategy and areas of focus, particularly when it comes to short term versus long term. (S39) Among all audiences there is growing concern about the lack of dialogue and understanding between Thames Water and the wider public. Thames Water has a sense of passivity regarding customer engagement, and could be doing more in terms of outreach i.e. educating on saving water and cutting costs. (S39) Among all audiences, having regular and timely catch-ups made a huge difference in positive perceptions. They suggest not limiting communications to just incident response or emails. (S39) Stakeholders provided feedback towards the solutions and delivery plan proposed in the dDWMP, and indicated that there should be more references to citizen science as a wider societal benefit in the Plan. The Outfall Safari programme has proven that local communities are willing to engage with their river environment and this will be key for large scale monitoring. (SP20) Stakeholders provided feedback regarding partnership working: - Improve integration across all Risk Management Authorities (RMAs) so opportunities for partnership working could be identified with greater ease. - Provision of a greater number of mutual objectives to make working in partnership easier. - Thames Water could approach stakeholders as a partnership lead, rather than stakeholders approaching Thames Water for funding. Stakeholders also expressed interest in a 2-stage funding process, where stakeholders received financial support in developing their initial proposal to put forward to Thames Water. - Stakeholders indicated that they have limited capacity and resources to support a significant amount of partnership schemes (i.e., SuDS) alongside statutory responsibilities. (SP20)	Insight Sources v18: SP20 DWMP Consultation Response – You said we did. February 2023 S39 Thames Water Stakeholder Research Report, March 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers

What Vulnerable Customers Want

For Customers	
CS1. I want an easy customer experience and tailored support	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.
AF1. I want fair and affordable bills	Vulnerable customers and those struggling to pay their water bills want us to better promote and raise awareness of the support available to them.
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	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.

For Communities	
CI1. I want you to give back to the community	Stakeholders expect stable leadership that engages effectively with stakeholders and communities and want Thames Water to do more to benefit society for the long term. They want proactive communication from us on community initiatives and educational programmes on water saving.

For 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	Consistent with all audiences

Segmented Insights

Vulnerable customers – detailed insights (1/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Customer experience for those in vulnerable circumstances	Some support organisations said that they had had to advocate on behalf of their service users to resolve billing issues. In one example, a customer had a dramatically increased bill, and tried to resolve it on their own with Thames Water. Initially, they were told they would have to pay it. However, when the support organisation got involved, there was found to be a leak and the payment was cancelled. However, it took a lot of phone calls and time. (CX113) Some described an inconsistent response when they contacted Thames Water a number of times and got different answers depending on who they spoke to. Furthermore, some call handlers were felt to be more supportive and empathetic than others. (CX113) Participants also identified practical barriers to applying for affordability support. Some described difficulties getting through on the phone and having to make numerous phone calls. (CX113) Others described specific logistical issues, such as a lack of phone credit making it difficult to make long phone calls; limited time in libraries for free internet access and the requirement to print, complete, scan and send WaterHelp application forms. (CX113) Some [vulnerable customers] in long term debt welcomed the fact that Thames Water did not aggressively chase them for payment but there was some feeling that the lack of proactive contact meant that it was easy for them to avoid actively engaging and to ignore their water bill debt. This exacerbated the problem and resulted in more issues in the long term. (CX113) A lack of joined up action was flagged by an intermediary organisation [vulnerable customers]. They had contacted Thames Water in relation to a customer who had a large bill because of a water leak and did not have capacity or confidence to speak to the company themselves. The intermediary arranged for payments to be made in instalments and also flagged the customer's medical needs. They were then directed to a separate department rather than everything being dealt with in one go. (CX113) Time available to deal with problems came up frequently in interviews. Many participants talked about the long wait times on phonelines to companies, and that this put them off making a call. Participants also talked about the persistence needed – many issues require multiple calls to organisations, and follow-ups when things do not happen. (CX113) Some had felt that call centre staff discriminated against them due to their accent. In contrast, a family member with a British accent had received a more compliant and helpful response. This was also mentioned by a Somali intermediary organisation who the company on behalf of a customer who had spent two months trying to get a leak addressed but felt that they were not taken seriously until the intermediary stepped in. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Vulnerable customers – detailed insights (2/16)

Segmented Insights

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Understanding the drivers of vulnerability (1/2)	*London is the most ethnically diverse part of the UK, with 46% of households identifying with Asian, black, mixed or 'other' ethnic groups. 37% of Londoners identifying as 'white British' is less than half of every other region in the UK*.* For vulnerable customers, the use of water and management of wastewater to meet their needs can be affected by i) Faith, culture, past experiences can affect usage and attitudes; ii) Medical conditions, family size and lifestage can affect needs; and iii) Income (CX90, CX113) For vulnerable customers, being able to afford and manage their payments can be affected by i) income and costs of living (NB poverty premium and disability price tag); ii) Life experiences (job loss; new baby; retirement; divorce; bereavement); iii) Access to public funds; and iV) Health & wellbeing: Cognitive or developmental conditions; poor mental health; 'headspace'/ cognitive load/ energy; memory issues (CX90) For vulnerable customers, being able to understand and represent their own interests can be affected by i) Inexperience and confidence; adverse life experiences; ii) Ability to read and communicate in English; iii) Renting/ bundled bills; abusive/coercive controlling relationships; iv) health & wellbeing: Cognitive or developmental conditions; poor mental health; 'headspace'/ cognitive load/ energy; memory issues; v) Digital confidence and access; and vii) Time (CX90) Particularly for those who had recently arrived in the UK, and even for some customers who had been living in the UK for some time, many found it difficult to get to grips with the systems and processes in the UK, made more difficult by other factors such as language barriers, the challenges of settling themselves and their families into a new country or trauma experienced from fleeing a war-torn country. (CX113) Non-native English speakers with limited English-speaking abilities, or indeed native accents, can lack confidence in seeking support due to often not being understood or fear of facing hostility resulting from negative stereotypes. (CX113) Thames Water's diverse customer base have needs varying in specificity, depending on a number of factors, including i) length of time in UK; ii) language; iii) experience of paying household bills; iv) confidence managing bills and suppliers; and v) support network in the UK (CX90, CX113) It should also be noted that there is lots of overlap in vulnerabilities e.g. those with physical health issues sometimes had underlying mental health needs and these tended to cause financial pressure (not being able to work, etc). It's important to note that not all customers in vulnerable situations are financially struggling - some older customers retried early and are in good financial state, others have young children and are financially secure and some have sought help with their bills. (PR24-14)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 PR24-14 Acceptability and Qualitative Testing Qualitative Presentation, May 2023 Insight Sources v17: CX90 Vulnerability Desk research slides, November 2022

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

*UK Census, ONS, 2021

Segmented Insights

Vulnerable customers – detailed insights (3/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Understanding the drivers of vulnerability (2/2)	Language also played a role in people's experiences, and was a key vulnerability risk factor. Within the scope of customers who do not have English as their first language, there is a spectrum of English language competence and confidence, from almost no English at all (reliant on family, friends and community members to translate and interpret in their day-to-day interactions) to confident in conversing in English, but could not (easily) read or write in English. (CX113) Those who lack English language skills often also lack digital skills. These customers relied more on their children (and for some – friends) to translate, advise, and make phone calls on their behalf. This was also apparent amongst a minority of White British participants, for example, one woman who 'hates computers' relied on her daughter to manage accounts and bills online. (CX113) Many customers who were new to the UK did not know what support was available to them, and particularly minority ethnic participants, especially those not brought up in the UK, and faced a further language barrier, and lack of digital skills to research online. Information on support is often only available in English and therefore fails to get the message across to minority ethnic groups. (CX113) Communication barriers were not limited to language: several participants said they experienced social anxiety and lacked confidence speaking to people. Having to pick up the phone caused a lot of stress for some of them, and some with limited English/strong accents reported experiences of dismissal or even hostility whilst contacting companies for help. (CX113) Participants with limited English said these calls took even longer for them due to the language barrier, and because they often had to draft in family members to translate, meaning a three-way conversation. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – detailed insights (4/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Supporting older and digitally excluded customers	Older socially isolated people can be particularly concerned about leakage and the impact on bills. (PR19-65) They tend to have limited interest in planning for the future and feel their water use is limited. (PR19-65) Older customers (75+) have a stronger preference for maintaining current service levels. (PR19-65) Digital exclusion goes beyond just not using the internet; the complexity of many tasks can cause exclusion and mean some people pay a premium for goods and services. (CX90) Digital skills and confidence is often linked to education and literacy. Other countries have less of an 'online culture' which can be difficult to adjust to when moving to the UK. Often the preference is to deal with issues over the phone (CX113) Lack of digital skills can also impact peoples' ability to find employment and improve their financial situations, as well as research what support is available to them and make applications (CX113) Some who lacked digital skills relied on their children to find information for them, email organisations, make payments, and set up online accounts. However, this reliance placed a burden on their children, and also meant they had less agency over their affairs and their problems. (CX113) Some participants did not have digital access because they could not afford broadband or data on their phones. As a result, they relied on using public spaces (free Wi-Fi; computers in libraries) to use email or online resources to deal with issues, meaning they could only do it at specific times, and for limited periods. (CX113) Digital exclusion was more common amongst some ethnic groups, for a number of reasons, including being linked to lower levels of education/literacy, inexperience in using digital devices, and some nationalities e.g. Eastern European and South Asian not being used to an 'online culture' i.e. dealing with things in person or over the phone. (CX113) Age alone does not necessarily create vulnerability, but increases likelihood of other risk factors, including i) younger age/inexperience; ii) disabilities/long-term conditions; iii) caring responsibilities; iv) bereavement; v) memory and cognitive decline; vi) lower digital access/confidence; vii) lower income (CX90)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 Insight Sources v17: CX90 Vulnerability Desk research slides, November 2022 Pre-2020 Insight Sources: PR19-65 CR29b WRMP Stage 2, BritainThinks, December 2016 **Insight Triangulation Key** Robustness of evidence: High Divergence of view (by group): n/a Regional differences: Low

Segmented Insights

Vulnerable customers – detailed insights (5/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Priority services register (1/2)	The vast majority of customers on the Priority Services Register (PSR) are satisfied with the services we provide. Very unsatisfied customers want us to improve our response to resolving issues both in terms of communication and long wait times. They are also concerned about bills being too expensive or being overcharged. (CX84, CX126) Though there is a low level of awareness and understanding of our Priority Services Register, customers are supportive of the idea and would like to be told more about it. (PR24-1) Overall awareness of any vulnerability support remained at 49% at Q1 2023/24, but still lower than 20/21 (52%). Awareness is lower for ALL features of the PSR compared to last year, apart from the Priority Services Register itself. Disabled customers and those 65+ are marginally more aware of PSR features. (CX84, CX126) Latest figures show less than half of vulnerable customers are aware of any vulnerability support available for them. Awareness of features is either the same or lower for almost all features of the PSR than the previous year and it was revealed that several elements of the PSR are more well known than the term Priority Services Register itself (CX126) (Q4 22/23 in brackets (CX119)): • Priority Services Register 18% (14%) • Support when water supply cut off (bottled water) 21% (24%) • Alternative formats such as braille or large print 23% (24%) • Help for deaf/hard of hearing 18% (17%) • Doorstep password scheme 10% (10%) • Ability to add carer/family member to accounts 9% (9%) • Language translation service 8% (11%) Stakeholders have raised that the needs of elderly people are becoming more acute; future Priority Services Register sign up targets and services will become even more important. (S14) 96% of customers over 80 were happy to be automatically enrolled onto our Priority Services Register. PSR auto-enrolment does not damage their impression of us and in some cases it enhances it. Some customers say they trust us more as a result of the registration and found the autoenrollment very considerate and thoughtful. (CX38) However, a sizable minority say they'd have preferred to be consulted first. Customers that remember receiving our letter/email informing them about the auto-enrolment are less concerned. (CX38)	**Insight Sources v18:** CX119 Vulnerability insight report 2022-23 Q4, May 2023 CX126 Vulnerability insight report 2023-24 Q1, August 2023 **Insight Sources v17:** CX84 Vulnerability insight report 2022-23 Q1, August 2022 **Insight Sources pre-v17:** CX38 Over 80s Priority Services Register auto-enrolment Follow up customer research, April 2021 PR24-1 PR24 Foundational Research - An analysis of customer views and expectation of Thames Water, November 2021

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – detailed insights (6/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Priority services register (2/2)	A number of issues were identified relation to the effectiveness of the PSR scheme by participants who were on the register. Examples include not receiving notifications about supply disruptions; not receiving bottled water; and Thames Water not reading meters. (CX113) Vulnerable customers would like Thames Water to promote the PSR more widely in support groups and through community centres. There were a number of ways participants suggested Thames Water should circulate information, such as through churches/mosques, credit unions, local councils/councillors, universities, landlords/housing associations etc, community events and social media. (PR24-14) There was no recall of any communications about the extra help propositions from Thames Water (either affordability or PSR). In contrast, many referenced communications from energy companies promoting the message, 'Don't suffer, we can help'. Several participants questioned why the company isn't publicising the schemes. (CX113) Some participants who were on the PSR felt that it needs to be easy to access services when needed and it is important for the service to work as advertised to demonstrate a real commitment to supporting people (rather than paying lip service). (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 PR24-14 Acceptability and Qualitative Testing Qualitative Presentation, May 2023 Insight Sources pre-v17: CX27 Customer experience - Affordability and Billing Research (Aug 20, Oct 21), October 21 CX32 Customer Voices (Strapline testing), August 21 PR24-1 PR24 Foundational Research - An analysis of customer views and expectation of Thames Water, November 2021 PR24-2 PR24 Foundational Research - Customer Voices, November 21 CX38 Over 80s Priority Services Register auto-enrolment Follow up customer research, April 2021
Providing channels for all (1/2)	We should offer multiple methods of communication for elderly customers, including postal options. (CX32) Vulnerable customers expect us to provide accessible contact methods to ensure disabled customers and those for whom English is not their first language aren't excluded. (CX27, PR24-2) Vulnerable customers want to feel like they are being listened to and our customer service staff treat them with empathy and understanding. Customers also want us to ensure the best possible service is given especially to the elderly and disabled. (CX27, PR24-1, PR24-2) For some of these groups, vulnerability may be temporary rather than permanent. Individual circumstances inform customers' specific needs. Customers with hearing disabilities following up on discounts on their bills find it difficult to communicate with our agents over the phone. They would prefer to communicate via email (CX27) Some who had who had had direct experience of contacting Thames Water had found the company really supportive and helpful (especially during the pandemic) (CX113)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – detailed insights (7/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Providing channels for all (2/2)	Via phone In terms of the type of problem, many said they would choose to phone an organisation if it was urgent, complex or if it involved affordability options. There was a sense that problems were more likely to be resolved more quickly by talking to someone directly (even if it meant being on-hold for a long time on phonelines). There was also a hope that there would be a more empathetic and understanding response if people could explain their situation over the phone (compared with email or online chat, for example). (CX113) Several participants talked about the importance of them having a record of what was discussed and agreed. In part, this was because they could not always remember, but also because there was some lack of trust that companies would stay true to their word (reinforced by experiences of inconsistency and broken promises. As a result, some made notes or wanted an email follow-up listing out what had been agreed. (CX113) The time taken to deal with problems by phone was a real burden for some. Some talked about call times lasting several hours. Participants in acute poverty faced an added issue of needing to cover the costs of a long call – even if it was a freephone number, they had to charge their phone, using precious electricity. (CX113) Online/email Some preferred accessing support and dealing with problems online or via email. They liked that they could do this in their own time, and that they had a ready-made audit trail. this option was not open to participants who were digitally excluded. Some lacked digital skills (and – in some cases – English literacy), and many of these participants relied on their children to find information for them, email organisations, make payments, and set up online accounts. However, this reliance placed a burden on their children, and also meant they had less agency over their affairs and their problems. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Vulnerable customers – detailed insights (8/16)

Segmented Insights

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Supporting customers with specific needs	Water quality, pressure, interruptions to supply and restricted toilet use can be of particular concern to customers with specific medical conditions or disabilities. (PR19-63) In particular, those with high water use due to a medical condition may rely on an uninterrupted supply for their treatment and there is some concern that we may not appreciate the potential risk to their health caused by any outage. (PR19-63) They may also be more concerned about metering and the impact on their bill when they are water reliant. (PR19-63) These customers can require additional support and understanding when experiencing different customer journeys, due to anxiety and other conditions which may be impacted by any disruption to their normal routine. (PR19-63) Customers with learning difficulties can require additional support and understanding when experiencing different journeys. (PR19-63) 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. (CX100) Poor mental health can impact customers' ability to choose (i.e. getting the right deal and taking out unaffordable credit) and pay (i.e. controlling finances, dealing with income shortfalls and unexpected changes) for services, as well as dealing with problems with the service received (i.e. return goods and deal with debt). (CX90) Beyond those who declared mental health issues, it was clear that a number of vulnerable customers were experiencing high levels of stress, and many talked about anxiety. Some were also dealing with the aftermath of domestic abuse and coercive and controlling behaviour. (CX113) There is lots of evidence of the way in which poor mental health can make people vulnerable to detriment in the utilities markets e.g. • Lack of headspace, confidence and energy to face and deal with bills, arrears, and problems; • Financial impacts, including the consequences of ignoring bills and arrears, which could create a vicious cycle of stress and avoidance, and spending compulsions and forgetfulness • Anxiety about contacting organisations, particularly to sort out problems (with evidence that some participants catastrophised their situation and the likely response). • Anxiety being triggered by the arrival of bills, payment reminders, and arrears letters (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 Insight Sources v17: CX90 Vulnerability desk based research slide deck, November 2022 CX100 UX - Affordability persona insight discovery 2021 (part 2), October 2021 Pre-2020 Insight Sources: PR19-63 CR08a/b Deliberative overlays, BritainThinks, March 2016

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Vulnerable customers – detailed insights (9/16)

Segmented Insights

What Vulnerable Customers Want

<table>
<tr><th>Sub-topic</th><th>Detailed Insights</th><th colspan="2">Key Sources</th></tr>
<tr><td rowspan="4">Billing and metering</td><td rowspan="4">There were mixed levels of understanding relating to bills: white customers and minority ethnic customers brought up and raised in the UK talked confidently about their bills and what they were being charged for. Many showed little interest and paid little attention beyond the headline figure of what was owed. (CX113)

Many found their water bill confusing, in particular the water/wastewater split, how costs were calculated and why they had received significant increases in their bills or changes to their payments. Changes to bills added to a sense that water bills were opaque and unpredictable. (CX113)

Some felt there was a lack of transparency over how the water bill is calculated (as outlined in the section on water billing) sometimes led to disbelief about how much money is owed. Some felt that their water bill keeps increasing but without any justification. (CX113)

Many had difficulties with mobility and dexterity, which affected their ability to read meters, and made them more susceptible to falls in the home. (CX113)

Participants said it was hard to control usage (and therefore costs), for several reasons:
• Some felt they had stripped back their usage to a bare minimum, but as water is a necessity, they were unable to reduce or change usage beyond their existing water-saving measures (in contrast to electricity or gas, where there was felt to be more scope to reduce and find some alternatives);
• (Metered) hard to know how much water being used daily or how much this costs because water meters are not easy to read (in contrast to smart meters for electricity and gas) and because bills came infrequently, it was hard to track how usage affects cost;
• (Unmetered) participants in smaller households said they were charged the same as friends with big families. (CX113)

• Support organisations also encouraged Thames Water to work with them, for example, running workshops and providing information and resources (e.g. videos in key languages). The kinds of messages they thought would be helpful include how water is charged for – that it is separate to rent; support available if struggling financially; the need to report meter readings when move house (so you're not charged for water you haven't used); and how bills are calculated. (CX113)

Some customers were also unaware of the range of payment options available to them. (CX113)

For some, receiving a water bill was a relatively new experience, as their water had previously been bundled in with their rent. The switch to direct billing had been difficult for several participants: it was perceived to be more expensive and it was another thing to think about. For some – particularly those from minority ethnic backgrounds and those with limited English – the switch to direct billing came as a shock, and they struggled to understand it. Some of the support organisations reported that they had needed to support their service users by explaining the change and what it meant for them. (CX113)

The majority of participants either did not have a meter or were unaware whether they had one. Of those who had meters, almost none had taken a reading, and many did not know where their meter was. Most assumed Thames Water would take the reading (though some complained that this did not happen, and that they still received estimated bills). Some said that they could not read their meter due to visual impairment or limited mobility, and they felt more reliant on support from Thames Water to read their meter (or install a smart meter). (CX113)</td><td colspan="2">**Insight Sources v18:**
CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key</td></tr>
<tr><td>Robustness of evidence</td><td>High</td></tr>
<tr><td>Divergence of view (by group)</td><td>n/a</td></tr>
<tr><td>Regional differences</td><td>Low</td></tr>
</table>

Segmented Insights

Vulnerable customers – detailed insights (10/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Affordability for those struggling to pay (1/3)	Cost of living is front of mind for most, particularly for less affluent customers. Significantly more households have become financially vulnerable as a result of the crisis. (R36, CX113) Customers accept paying some extra on their bill to support a discounted tariff for low-income customers. They welcome our other forms of financial assistance and urge us to better promote all our schemes to eligible customers. (PR19-21) Customers believe no one should be without water and that Thames Water has a responsibility to support vulnerability customers who cannot afford bills, as water should be available to all. (SP15) Most feel that customers on a social tariff should be metered and encouraged to use water efficiency measures and that the social tariff should be used to help customers on a low income or with a disability. (PR19-21, PR24-2) More broadly, the vast majority of consumers are very concerned about how higher energy bills announced in the new price cap will impact their household finances this year – nine in ten consumers think energy and water companies should be supporting people who have difficulties paying their bills. (R16) 23% customers qualify for a social tariff (up from 11% in 2018) - this number is higher amongst customers over the age of 55, lower socio-economic groups, BME communities, customers living in London, customers with disabilities, and those with low/no internet use. (CX82) 30% of households reporting they struggle to pay their water/wastewater bill in London and 20% in the South East (R53). Female customers, under 55s, lower socio-economic groups, those with a disability and unmetered customers are more likely to struggle. 42% customers who qualify for a social tariff are struggling to pay their bills vs 27% for those who don't qualify. (CX82) More people are struggling to pay their bills at least sometimes since October 2022 and fewer said they never struggle to pay. Younger people are most likely to struggle to pay their bills (78%) (R53) 50% of bill payers believed it is likely they will struggle to pay a utility bill over the next year and 86% of bill payers who reported struggling to pay a water bill over the past year expect to struggle with a utility bill in the coming year (R36) To help end water poverty, companies need to continue to evolve their engagement with those customers most at risk of financial vulnerability as a result of the changing economic situation, and learn from the affordability pilots that have explored this issue. As part of this, they may want to examine their company specific Water Matters data more closely, to see if it has any insights into knowledge gaps in their areas. (CX110)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023 R53 Cost of Living Survey, Ofwat. May 2023 CX110 CCW Water Matters 2022 (Thames Water Results and full data report), April 2023 Insight Sources v17: CX82 Social Tariff Research, September 2022 R36 Cost of living diaries, BritainThinks, November 2022. November 2022 **Insight Sources pre-v17:** R16 Giving UK Utility Customers a Voice, February 2022 SP15 Thames Water Customer Voices Public Value Research, May 2022 PR24-2 PR24 Foundational Research - Customer Voices, November 21 **Pre-2020 Insight Sources:** PR19-21 CR58c Social Tariffs, Populus, March 2018

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – detailed insights (11/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Affordability for those struggling to pay (2/3)	The vast majority of vulnerable customers are worried about rising costs - many are on fixed incomes, with little opportunity to bring in extra income. Some participants were particularly concerned about how they would cope when their energy costs returned to 'normal' after the end of the Government's Energy Bills Support Scheme. Support organisations also described the anxiety and pressure created by the Cost of Living crisis. (CX113) Many participants described changes in behaviour to manage with higher costs of living: shopping in low-cost supermarkets; reducing their use of gas and electricity; changing their diet (less meat; no fruit); entertaining, traveling and eating out less. Some were also borrowing more (and more frequently) to cover essential costs and bills, either from friends or using credit cards. (CX113) Some participants said that it was hugely time-consuming to manage on tighter budgets: travelling further and to more shops to get the best deal; researching money-saving tips; and spending time on the phone negotiating with providers. (CX113) Several participants said or implied that their income did not cover essential costs (i.e. they were in negative budgets). These participants talked of using foodbanks; selling a car to pay an energy debt; and relying on donations, vouchers or gifts to cover essential costs (e.g. one Bengali woman would ask her children for money (instead of gifts) for birthdays, Eid and Mother's Day, and then use this to cover her food and energy costs). Support organisations also reported some severe impacts of the Cost of Living crisis on their highly vulnerable clients, with some significant impacts on their lives and lifestyles. (CX113) Some had been just about coping before the cost of living crisis and haven't needed to ask for help before. These are new pressures and they find it hard accepting they cannot cope, and they do not know where to turn. Financial pressures mean people need short term loans more frequently, but friends and family they may have relied on previously are now also squeezed and cannot help. (CX113) Support organisations are overloaded and/or have reduced capacity. Citizens Advice was cited several times as an organisation that is hard to access now, as support has gone online/ via phone lines and appointments are very hard to come by. However, participants mentioned similar issues with other organisations too. (CX113) There was some presumption that everyone is suffering, and therefore you just have to put up with it, or you assume others are more deserving. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – detailed insights (12/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Affordability for those struggling to pay (3/3)	Vulnerable customers would like Thames Water to provide more support to customers struggling to pay their bills. (PR24-14) A minority of customers feel they struggle to pay their bills but only a few get financial support with their water bill. A consistent 4~6% of Thames Water customers always/frequently struggle to pay their water/waste bill, and around 17% always, frequently or sometimes struggle to pay their bill. (CX119, PR19-63) Financial assistance is appreciated by those who receive it, but they suggest we could be more proactive at an earlier stage. (PR19-63) Customers on low incomes and/or receiving financial support are more likely to be concerned about the affordability of bills. They are more likely to try and use less water to save money, more likely to be concerned about metering in case it increases their bill and are concerned about leakage and its potential impact on their bills. (PR19-63) Low-income customers 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. (PR19-63) Customers think each generation benefits from past investment and so current customers should expect to do the same for future generations. (PR19-4) More broadly, around a third of consumers are struggling to pay bills at least some of the time and around one in eight claimed to struggle all the time. Nearly half of those struggling 'all of the time' have borrowed money from friends and family and a third of whom have received financial help from water companies. (R14, R53) Some customers feel that our polices are like a 'straight jacket'; Thames Water's people are not empowered to flex the policy when needed to ensure the right outcome for the customer is achieved. (CX100) We are not giving our people the skills to 'read between the lines' when customers are having uncomfortable conversations about their circumstances, meaning they don't spot financial vulnerability. Nor are we equipping them with the coping skills to deal with these conversations. (CX100) The application process can be high effort and complexed for some customers to navigate through. Customers can be left feeling like their application has gone into a 'blackhole' when the process takes longer than they'd expect. (CX100)	**Insight Sources v18:** PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023 R53 Ofwat - Cost of living: Wave three - water customers' experiences, May 2023 CX119 Vulnerability insight report 2022-23 Q4, May 2023 **Insight Sources v17:** CX100 UX - Affordability persona insight discovery 2021 (part 2), October 2021 **Insight Sources pre-v17:** R14 Ofwat Customer Spotlight Report - Peoples' views and experiences of water, April 2022 **Pre-2020 Insight Sources:** PR19-4 CR19 Intergenerational fairness, BritainThinks, October 2016 PR19-63 CR08a/b Deliberative overlays, BritainThinks, March 2016

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – detailed insights (13/16)

What Vulnerable Customers Want

Sub-topic	Detailed Insights	Key Sources
Dealing with debt	Culture and religion play an important role in peoples' perceptions towards debt; some communities were proud and self-reliant when it came to debt and finances (e.g. African and Caribbean communities), whereas borrowing from friends and families was more commonplace amongst others (e.g. South Asian). Some religions (e.g. Islam) urge the avoidance of debt and accrual of interest (CX113) Support organisations raised the fact that some migrants can be more susceptible to accruing large debts, particularly when their immigration status is uncertain, or takes time to resolve. They talked about services users who had accrued large medical bills (including from giving birth in NHS hospitals) due to not having access to public funds. (CX113) Support organisations also suggested that – amongst people who grew up in the other countries – there is a greater fear not an understanding of how debts are managed by creditors in this country. As a result, there was a large degree of fear around the threat of debt collection. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023 **Insight Sources v17:** CX82 Social Tariff Research, September 2022 R36 Cost of living diaries, BritainThinks, November 2022 CX84 Vulnerability Insight Report 2022-23 Q1, August 2022
Awareness of financial support	Awareness of Thames Water giving support to financially vulnerable customers is generally quite low. (CX82, R36) 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. (CX84) Some vulnerable customers were aware that they were on affordability schemes (mostly WaterSure and WaterHelp) and are grateful for these. (CX113) A significant minority of vulnerable customers are unsure if they receive any form of discount. These participants tended to be those who do not speak English and who have been supported in their communications with the company by family or friends. For example, one Eritrean participant initially indicated that they did not receive WaterHelp only to be corrected by her interpreter who acted as her advocate and had previously helped her to apply. (CX113) Other participants knew that they were on a scheme but were confused by the detail and often the name – referring to it as 'the discount', 'WaterStart', 'SureStart' etc. Nearly all of these had found out about the schemes only when they got into difficulties with bills, or because a friend/ family member had mentioned them. A handful had heard about the support through Money Savings Expert. (CX113)	

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Vulnerable customers – detailed insights (14/16)

Segmented Insights

What Vulnerable Customers want.

Sub-topic	Detailed Insights	Key Sources
Perceptions of water quality and safety (1/2)	Many vulnerable customers said their water was hard or 'scaly' and in London and Reading, a notable number expressed concerns over the quality or safety of the tap water. Many said they did not like the way their water tasted, looked or smelt ('chemically'; 'cloudy'; 'gritty'; 'heavy'), and this made them doubt the cleanliness of the water or the chemicals that had been added to it to clean it. (CX113) Some customers believed that water was drawn from the Thames, which they perceived as dirty; others talked about the fact that the water is recycled multiple times; some thought it was recycled sewage water. Although they knew it was treated, they worried about residual contamination from dirt, bacteria and chemicals. Some also worried about microplastics. (CX113) Some were influenced by opinions from others that the water was not good for you (e.g. by an 'expert' who fitted water tanks). (CX113) Comparisons with water from elsewhere: those with experience of water from other parts of the country said it was better there. Notably, several of the participants from Ghana, Eritrea, and Somalia said that water they drank there was pure, clean, and 'natural'. (CX113) A couple of participants felt that water was poorer quality in the more densely populated (and poorer) areas of London. For one participant, this was due to beliefs about social inequality; for others it was a sense that the dirt and waste created by so many people would affect the water quality. (CX113) Many participants avoided drinking water straight from the tap. Instead, they chose to filter their water (all communities); drink bottled water (common across all communities, but particularly amongst Black African participants); or boil their water before drinking it (a minority, mostly Pakistani and Bangladeshi participants). (CX113) There were various reasons for drinking filtered, boiled or bottled water, including: • Disliking the taste of tap water; • Presumed better quality: this was a key driver for sticking with bottled water or filtering it – a feeling that it was 'purer', less contaminated, and better for you; • Health and wellbeing: some had switched to bottled water because they believed their health and skin conditions were caused (or at least not helped) by tap water; • Habits growing up or acquired from living abroad (which were considered hard to shake); • Expectations from family and/ or visitors (for example, when entertaining, bottled water would be provided instead of tap); • The impact of hard water on kettles. (CX113)	**Insight Sources v18:** CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Vulnerable customers – detailed insights (15/16)

Segmented Insights

What Vulnerable Customers want.

Sub-topic	Detailed Insights	Key Sources
Perceptions of water quality and safety (2/2)	Notably, even some of the participants who were under extreme financial stress were buying bottled water. They talked about buying the cheapest bottled water (20-30p; from Lidl and Aldi), and/or buying it in bulk (e.g. from CostCo). For them, it was a necessity and it was a habit that was hard to change. (CX113) Some participants drank water straight from the tap, but they were in the minority in this sample (albeit a large minority). For them, the water was 'fine', and/or they had grown up with tap water. However, some participants talked about switching to tap water from bottled, either to reduce plastic waste, or to save money on bottled water (CX113) There was also evidence that time spent living outside of the UK influenced people's perceptions of drinking water: many of those who had lived abroad drank bottled water, as they had when abroad and the quality of tap water was not dependable (CX113) Perceptions of the water system There is a mixed understanding amongst vulnerable customers of how water reaches us, how wastewater is taken away, where it goes and how it is processed and treated. Understanding was slightly higher amongst people born in the UK and amongst older people. Some of them could name reservoirs and treatment plants, and had an understanding of the water treatment cycle. (CX113) Most did not think about how water reached them, or where it comes from. This was particularly the case with participants with African and South Asian heritage, and more so with those who were born outside of the UK. (CX113) there were also some myths and rumours about the water supplied via taps, such as that it is (treated) sewage water; that it comes direct from the Thames; and about levels of chemicals, toxins and bacteria. Concerns about safety and cleanliness were more prevalent amongst participants of African and South Asian heritage. (CX113) For the most part, however, people had limited interest in what happens to get water to them or to manage wastewater. In addition, only a small number of participants mentioned concerns regarding environmental issues; sewage release into waterways; or water company profits; all of which had been news stories around the time of the research. Slightly more people talked of hosepipe bans, and several talked about burst pipes and leaks; both of which had perhaps had more of a direct impact on them. (CX113)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023

Insight Triangulation Key	
Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Vulnerable customers – detailed insights (16/16)

Segmented Insights

What Vulnerable Customers want.

Sub-topic	Detailed Insights	Key Sources
Experience of vulnerable customers with supply interruptions	Experiences of issues with water supply were fairly common in this research. Several participants had experienced outages in the last few years, some talked of problems with water pressure, and a minority had had problems with the quality of their water (e.g. 'muddy' water). (CX113) A few customers felt that these issues hadn't caused much of an issue (although it had been stressful at the time). For most, the issues were short-lived and they had found ways around them. However, some participants found it more difficult and stressful, particularly disabled people, and those with large families and young children. (CX113) Where participants had experienced disruption to their water supply, most had checked if neighbours had similar issues, went to their local supermarket to stock up on bottled water, and waited for the supply to come back on. (CX113) A minority of participants recalled having received notifications of planned works (either by letter or text), but most said disruptions were unexpected. (CX113) Some (especially younger and digitally confident participants) had checked their neighbourhood social media feeds or Thames Water's website directly. Few had called Thames Water directly, as they had assumed the disruption would not last long. (CX113) Customers with disabilities and health conditions say it would be more difficult for them to adapt in the event of a water shortage and want Thames Water to prioritise them in an emergency. Hosepipe bans would not have a significant impact but an Emergency Drought Order (a limit on water supply for up to three months) would and is something they would be open to paying more for to reduce this risk. (PR19-65) Those with mental health conditions note that severe water restrictions could significantly impact their mental wellbeing. (PR19-65) Customers with mental health conditions can have very loose support networks and may not have anyone that they can count on to help them in an emergency. More frail customers would find it difficult to cope themselves in an emergency. (PR19-65) Severe water restrictions such as rota cuts (water supply limit imposed on different areas by rotation) is something vulnerable customers can cope with; however, it is important to note that these customers tend to be reluctant to admit they require support. (PR19-65) Customers with mental health problems across all regions consider it relatively easy to deal with water companies, compared with other utilities, as they do not have to think about choosing a supplier, or do not worry about the risk of the service being cut off. (PR19-65)	Insight Sources v18: CX113 Vulnerability Deep Dive Research, April 2023 Pre 2020 Insight Sources PR19-65 CR29b WRMP Stage 2, BritainThinks, December 2016

Insight Triangulation Key

Robustness of evidence	High
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Vulnerable customers – Digitally excluded customers

Specific insight from digitally excluded customers

Sub-topic	Detailed Insights	Key Sources
Digitally excluded customers	Digitally excluded customers generally revealed a higher sentiment towards Thames Water than other customer groups, particularly agreeing that Thames Water take providing an essential service seriously and trusting Thames Water to provide water and wastewater services. They are also significantly more likely to recommend Thames Water to a friend than other customer groups*. (PR24-15) Digitally excluded customers placed a significantly higher importance on Thames Water prioritising upgrading sewage treatment works to prevent sewer overflows. (PR24-15) The digitally excluded sample were significantly more likely to deem all the proposed enhancement cases as important than all the other sample types, and generally more likely to support each of the proposed investment options* (PR24-15) Customers who participated in the offline survey for the social tariff research were more likely to oppose paying extra (all proposed amounts) towards the cross subsidy. (CX82) Customers who participated in the offline study are generally more tolerable to a number of scenarios, compared with the online sample. Example scenarios include pollution of water supply sources, drought and water treatment works failure, and flooding. (SP6)	**Insight Sources v18:** PR24-15 Enhancement Case Deep Dive Research, May 2023 **Insight Sources v17:** CX82 Social Tariff Research, September 2022 **Insight Sources pre-v17:** SP6 Water Supply System Resilience Programme – Customer Research (Quantitative findings), January 2021

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	n/a

**it was noted that this group were taken through the survey by a phone interviewer and perhaps more likely to provide positive answers - what they thought the interviewer wanted to hear*

Segmented Insights

Business customers

What Non-household Customers Want

For Customers	
CS1. I want an easy customer experience and tailored support	Expect proactive contact, an explanation, an apology and higher levels of compensation during service failures. Would like communication ahead of interruptions for planning and mitigation purposes. They want us to identify vulnerable businesses and put in place enhanced communications and emergency provision.
AF1. I want fair and affordable bills	Particularly concerned with any aspect that impacts billing of their non-household end-consumers. Businesses are particularly concerned with accuracy of billing to inform their budgeting and forecasting.
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	Particularly concerned about service failures as these potentially cost them loss of trade and customers. They want us to provide a resilient and reliable water supply and are willing to pay more to improve resilience and reduce the risk of water use restrictions.

For Communities	
CI1. I want you to give back to the community	Business customers tend to place less importance on community initiatives, but would like clearer communication from Thames Water on these topics.

For 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	Prioritise water resource options which would provide large amounts of water, offer a long-term solution and are not energy intensive. Businesses encourage the roll-out of smart-metering; they welcome 'smarter data' as they are increasingly interested in more accurate and more granular consumption data.
WS3. I want you to reduce emissions and reach net zero	Business customers tend to place less importance on environmental and energy transition initiatives

Business customers – detailed insights (1/4)

Segmented Insights

What Non-household Customers Want

Sub-topic	Detailed Insights
Water service and interruptions	Businesses are mostly clear that Thames Water delivers a reliable and consistent supply of water but want to see improvements in its customer service e.g. more frequent and timely communications, and minimised disruption. (PR24-11) Future bill payers and business customers both appreciate a constant supply of consistently clean water as a fundamental service and expect this to continue without interruption or contamination. (PR24-11) Business customers and household customers largely react the same way towards interruptions, but business customers have higher expectations of Thames Water as they are considering the impact on their business running, as well as the facilities needed for staff (CX42). Businesses place high priority on communication ahead of interruptions for planning and mitigation purposes. They also expect a degree of assistance and compensation (e.g. water tankers to provide greater quantities of water for business use not just drinking water). For some business customers, the supplying of bottled water is considered essential whereas others see this as a nice gesture (not the basic expectation). (SP6) Duration of interruptions is important across all customer types, but it is the main driver for businesses for whom water is integral, as well as those who have experienced supply issues in the past. (SP6, PR24-12, PR24-15, PR24-14)
Lead pipe replacement	Some business customers have a poor understanding over responsibilities for pipes in homes vs business premises and would like clarification on this topic. (PR24-8) Non-household customers felt that replacing lead pipes was a higher priority amongst water service improvement areas compared to household customers. (PR24-12) Due to the potential health risks, this was a top priority to address for customers who thought it could be a win-win on an individual and societal level – protecting customer health and replacing the ageing infrastructure (which could reduce leakage), despite some non-household customers being concerned around associated disruptions to supply. (PR24-12)

Key Sources

Insight Sources v18
PR24-15 Enhancement cases deep dive research, May 23
PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023.

Insight Sources v17
PR24-12 PR24 Enhancement Package Options research , September 2022

Insight Sources pre-v17:
PR24-11 PR24 Foundational Research: What is important to Future Bill Payers and Business Customers, May 2022
SP6 Water Supply System Resilience Programme – Customer Research (Quantitative findings), January 2021
PR24-8 Deep Dive: Lead Pipes, February 2022
CX42 non-household smart meters and data research, July 2021

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Business customers – detailed insights (2/4)

What Non-household Customers Want

Sub-topic	Detailed Insights	Key Sources
Smart metering and data	For the majority of non-household customers, water is generally a problem-free utility; engagement with their water meter is only necessary if a malfunction occurs in the system or they identify a discrepancy on their bill. (CX42) Most non-household customers feel they receive the appropriate data services necessary for activities related to their water usage; non-household customers may use water usage data and its associated costs for completing bill payments or creating financial forecasts and budgeting. For example, most non-household customers use water consumption data to check their bill matches their expectations, to draw comparisons between time periods. Some common use cases of water consumption data include: • To ensure tenants on site are being accurately billed • To check for any cost inconsistencies and potential issues (e.g. leaks) (CX42) Generally, non-household customers are content with the format, frequency and detail of the water data they currently receive. However, those without data loggers or data delivery services (DDS) more frequently referenced the need for more accurate and detailed information on their bills (e.g. usage by premises/building). While those with data loggers or DDS were generally content with the level of detail, they felt it could be clearer, using graphs or coming with explanations of what the data means in 'layman terms' (e.g. how many "swimming pools worth" of water has been consumed). (CX42) Non-household customers are increasingly interested in more accurate, more granular consumption data due to short-term post-covid planning, medium term focuses on cost reduction and the longer-term necessity of focusing on sustainability. The degree of engagement with metering/consumption data mainly depends on the size or type of business; large national corporates are more likely to have higher engagement with the data than smaller, local single-site businesses. (CX42) Businesses have varied understanding of smart metering and the potential data services Thames Water could provide. At the same time as offering any additional data services to businesses directly or indirectly, we need to educate business customers about the limitations and benefits of smart meters and the additional services which could potentially help support wider business needs. Education and trial periods may make businesses more willing to accept upfront costs. (CX42)	Insight Sources pre-v17: CX42 non-household Smart Meters and Data Research, July 2021

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Business customers – detailed insights (3/4)

What Non-household Customers Want

Sub-topic	Detailed Insights	Key Sources
Wastewater service	Most non-household customers agree that customers have a role to play in helping avoid problems with the wastewater system, and that this should come alongside more information about what not to put down sinks and flush down toilets. (SP9) 82% of non-household customers also agree that it is better to repair and replace sewers when they show earlier signs of wear and tear, even if it costs more money, in order to avoid storing up problems. (SP9) Non-household customers are more divided in establishing whether the long-term plan for the wastewater system should focus on improvements to the sewers Thames Water is responsible for or putting forward schemes that benefit other parts of the drainage system. These customers are also split on whether responding quickly to wastewater flooding and helping customers recover from the flooding is more important than preventing the flooding from happening in the first place. (SP9) Contrary to household customers, non-household customers expressed higher levels of support for more stringent storm overflow targets, even if it resulted in higher bills / came at expense of efforts to reduce flooding. (SP20) Amongst majority of household customers, there has been a general shift in awareness, belief and support of environmental issues. However, it is evident that not all non-household customers support a bill increases aimed at addressing environmental issues. (SP20)	Insight Sources v18 SP20 DWMP Consultation – You Said We Did, February 2023 Insight Sources pre-v17: SP9 Drainage and Wastewater Management Plan - Customer Research: Part 3 Quantitative Research - Final Report, November 2021

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Business customers – detailed insights (4/4)

What Non-household Customers Want

Sub-topic	Detailed Insights
Billing and costs	The majority of non-household customers (88%) believe it is important that their water and sewerage bills are based on meter reads rather than 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 (CX35). 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 (CX35). 80% of sole traders believe bills based on meter reads rather than estimates is important, stating this is because they want to be charged for what they use (CX35). Having invested in technology they feel could improve water efficiency (e.g. coffee machines), non-household customers compare their water consumption data with other organisations of their size and set benchmarks for employees to work towards. Metering helps non-household customers with their water efficiency, but also in their efforts towards sustainability and predictability of bills. (CX42) Cost of water is an overriding concern, especially for small businesses, which leads to some customers being reluctant for bill increases. Although customers feel that water is cheaper than gas/electric, they express a desire for Thames Water to be more proactive and incentivise customers to save water, and money. (PR24-14) Close to half of (46%) businesses say they never struggle to pay their bills, but almost a quarter do have some difficulty paying their bills (24%). 2 in 5 (40%) of businesses are operating with financial difficulty. Only 18% saying they are operating comfortably. Over half the businesses (51%) of businesses expect their financial situation to improve in the years to come and only 16% expect it to worsen. (PR24-17)
Value for money of data services	For non-household customers, proven, long-term benefits (e.g. avoiding the unexpected costs of future leaks) is central to their willingness to pay upfront for further data services. (CX42) When asked about value for money of potential data services Thames Water could offer non-household customers (such as data analytics, water efficiency and leakage monitoring), the majority feel that £10-20 per month on top of their current bill is acceptable, whilst for others, 3-10% more per year feels more reasonable. (CX42)
Keeping business customers informed	Business customers want to be kept informed by Thames Water about new initiatives and only hear negative things through word of mouth of through the media. (PR24-11) Business customers want clearer comms on Thames Water's role and activities, investment into green energy and supporting customers to have lower bills. (PR24-11)

Key Sources

Insight Sources v18
PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023
PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Insight Sources pre-v17:
PR24-11 PR24 Foundational Research: What is important to Future Bill Payers and Business Customers, May 2022
CX35 CCW research on SME customers' preferences for meter reading frequencies, August 2021
CX42 non-household Smart Meters and Data Research, July 2021

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Retailers

What Retailers Want

For Customers	
CS1. I want an easy customer experience and tailored support	Want data accuracy to be improved by ensuring they can access customer meters, consumption data and take readings without disruption.
AF1. I want fair and affordable bills	Particularly concerned with any aspect that impacts billing of their non-household end-consumers.
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	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.

For Communities	
CI1. I want you to give back to the community	Consistent with all audiences

For the Environment	
WT3. I want you to fix leaks and ensure there is enough water now and in the future	Retailers 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.
WS2. I want you to stop polluting rivers and to improve their quality WS3. I want you to reduce emissions and reach net zero	Retailers see accuracy and data quality improvements as integral to wider national sustainability goals, such as Net Zero

Retailers – detailed insights (1/3)

Segmented Insights

What Retailers Want

Sub-topic	Detailed Insights
Overall Service	Since August 2022, where Thames Water ranked second last amongst water companies in '*Overall service*', and suffered from considerable reductions in R-MeX scores from previous reports, Thames Water has seen in improvements in scores across the board (with the exception of 'Effectiveness of financial policies' which has remained the same). They have climbed one position to 13th in February 2023. (CX112) In past reports, retailers have stated they are generally pleased with account management and the support they receive. In February 2022, retailers were most satisfied with the 'Effectiveness of systems and notifications' and the 'Level of engagement and support' (CX52-54, CX99, CX112) Although speed of service/timeliness has consistently remained an issue for numerous retailers. (CX52-54, CX99, CX112)
Communication	In previous R-MeX reports, most retailers' perception of Thames Water's communication is generally positive, with a few exceptions. (CX52-54, CX99, CX112) However, in most recent reports, Thames Water performs poorly compared to other water companies in '*Level of communication during incidences*', 'Quality of data maintenance and improvement' and '*Effectiveness of financial policies*'. (CX112) Those with a negative perception do not believe they receive notification emails for each and every incident, and wish to see the timeliness of these emails improve, as well as update emails throughout the duration of the incident. (CX52-54)
Responsiveness	Thames Water ranked third last amongst other water companies in '*speed and quality of response to service requests*'. (CX112). Follow up and escalation processes are frequently cited as issues amongst retailers. (CX52-54) Retailers have generally very positive perceptions of account managers, but several find issues with responsiveness when account managers must rely on other teams for the required information/update. (CX52-54)

Key Sources

Insight Sources v18:
CX112 R-MeX report, February 2023

Insight Sources v17:
CX99 Retailer Measure of Experience Outputs Survey, September 2022

Insight Sources pre-v17:
CX52 R-MeX Report, December 2020
CX53 R-MeX Report, August 2021
CX54 R-MeX Report, February 2022

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Retailers – detailed insights (2/3)

What Retailers Want

Sub-topic	Detailed Insights	Key Sources
Systems and notifications	Retailers generally have a positive outlook on Thames Water systems; they find the portal user-friendly. (CX54) Some mention their desire for all notifications that are currently received via email to be provided on the portal. (CX54)	Insight Sources pre-v17: CX42 non-household smart meters and data research, July 2021 CX54 R-MeX Report, February 2022
Data Quality	Data inconsistencies are a key area that is frequently mentioned by retailers as a top issue. (CX54) For retailers and third parties, accuracy and data quality is a top priority and they see it as an area requiring improvement going forward. (CX42, CX54) To help retailers produce accurate bills, many feel data accuracy needs to be improved by ensuring they are able to access customer meters, consumption data and take readings without disruption. For third parties supplying additional data services, improving data quality is important, to ensure they can accurately interpret and analyse data. (CX42) Some retailers see accuracy and data quality improvements as integral to wider, national sustainability goals such as Net Zero, with the perception that current services (analogue, digital or smart) are not sufficient for uninterrupted, accurate data usage monitoring. (CX42) Many retailers and third parties also anticipate that the ability to attach a data logger will become less important as water meters become 'smarter', so long as they are able to access the water consumption data that is collected. (CX42)	

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Retailers – detailed insights (3/3)

What Retailers Want

Sub-topic	Detailed Insights	Key Sources
Smart meters	Retailers and third parties are positive about smart meters in theory, but some have concerns about their current delivery. All retailers and third parties saw smart water meters as a natural progression for water metering moving forward. A belief that smart meters would mean improved accuracy and reliability of data collection was central to positive perceptions. (CX42) For several retailers, smart meters are also regarded as an important step to achieving better water efficiency across the UK by allowing for more accurate meter reading and monitoring. (CX42) However, there are some reservations around current smart meters, primarily focused on disruptions to meter readings and an inability to access the data on new smart meters. (CX42) Third parties and retailers feel smart meters are not currently operating to their full potential as they are unable to access data, and therefore unable to provide customers with consistent and accurate data services that they are billed for. (CX42)	Insight Sources pre-v17: CX42 non-household smart meters and data research, July 2021
Data services	When asked about value for money of potential data services Thames Water could offer non-household customers (data analytics, water efficiency and leakage monitoring), retailers' main requirement is that any additional costs are fair and justifiable, to ensure they can be passed onto customers with clear benefits. (CX42) Retailers and some third parties are agnostic on competition issues associated with new meters, provided they/their customers have access to data and/or can pass on any additional costs/add value. (CX42)	

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Developers

What Developers Want

For Customers	
CS1. I want an easy customer experience and tailored support	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.
AF1. I want fair and affordable bills	Developers want value for money and for Thames Water to improve billing accuracy
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	Developers would like dependable delivery and effortless services with schedules that can be flexible to meet developer needs. They want Thames Water to facilitate greater co-ordination with our engineers and other utilities, including better information sharing to collaborate on future plans.

For Communities	
CI1. I want you to give back to the community	Developers want to work with Thames Water to be 'good neighbours' to communities in close proximity to their developments and ensure minimal disruption to them

For 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	Consistent with all audiences

Segmented Insights

Developers – detailed insights (1/3)

What Developers Want

Sub-topic	Detailed Insights
Water supply	Developers feel that water resilience is a problem in London and highlighted data centres as an emerging issue. Questions were raised as to why the emergence of a few data centres could cause such a serious supply issue/constraint. Stakeholders noted the implications from a water demand perspective as well as energy. (CX86) Developers want to see as many properties being metered as possible so people pay for what they use. (CX86) Developers were positive about the new water device labelling scheme for water efficiency being introduced in 2025. Focus has been on energy rather than water use recently. But the incoming water label process will enhance understanding of water efficiency. (S40, S41)
Disruption to communities	Developers want to work with Thames Water to be 'good neighbours' to communities in close proximity to their developments and ensure minimal disruption to them. (S8)
Quality of service and communication (1/2)	Developers want Thames Water to improve their knowledge of sites and understanding of customers' requirements. (CX33, CX47-51) They also want value for money and for Thames Water to improve billing accuracy. (CX33, CX47-51) Time taken to resolve issues and time spent chasing up issues is also frequently reported as an issue by developers. Issues not being resolved quickly was also a frequent factor mentioned in negative Trustpilot reviews. (CX1-CX14, CX76-81, CX96-97). Performance has however improved in developer satisfaction with speed of response and provision of single point of contact through 22-23. (CX111) A failure to keep promises around follow-up communication and updates is an area of concern for developers. Also taking too long to provide quotes and the quality of the information provided. Developers want us to improve communications with them, simplify our processes and respond quickly to their queries. (CX111) Satisfaction with DS water is significantly lower than it is with DS waste, driven by long wait periods to begin work and tackle issues, unfulfilled promises to contact customers back, and a lack of high-quality updates all have contributed to dissatisfaction. Customers also perceive the service to be quite expensive. (CX121) They feel there is a lack of proactive communication from Thames Water and these customers feel disappointed by a lack of promised updates and call-backs. Developers feel Thames Water could improve through having a single point of contact and providing better updates with clear information. Having personal relationships helps developers to manage the complexity of their work. (CX33, CX47-51, PR19-72, CX76-81) Performance has improved in developer satisfaction with speed of response and provision of single point of contact. (CX121)

Key Sources

Insight Sources v18:
CX111 D-MeX 2022-23 Q4 year 3 review, June 2023
CX121 Heartbeat of Customer Insight, August 2023
S40 Research Summary Form - Home Builders Federation
S41 Research Summary Form - Berkeley Group

Insight Source v17:
CX86 Research Summary Form - Developer Scrutiny Panel, September 2022

Insight Sources pre-v17:
CX33 Thames Water D-MeX (Developer Services) 2021-22 Q2 Summary (Dec 21), December 2021
CX47 D-MeX Year 1 Review, June 2021
CX48 Developer Services Heartbeat Insight, August 2020
CX49 D-MeX 2020-21 Q2 Qual Results, December 2020
CX50-51 D-MeX 2021-22 Q1, Q3 Qual Results, March 2021

Pre-2020 Insight Sources:
S8 PR19 Summary of Stakeholder Engagement, April 2019

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Developers – detailed insights (2/3)

What Developers Want

Sub-topic	Detailed Insights	Key Sources
Quality of service and communication (2/2)	Developers want Thames Water to speak to them in plain language that they understand. (PR19-69, PR19-70) Developer customers notice when Thames Water communicates well, but it is consistently the main area where they would like to see improvement. (CX33, PR19-70, CX47, CX51, CX95-97) The majority of developers indicated that communication is the most important factor when dealing with Thames Water. (CX109) Customers scored Thames Water's quality of communication lower in Q3 2023, indicating they want Thames Water to be more proactive with communications and updates. Customers also indicated that processes need simplifying, improved timescales with faster response times and reductions in delays. These are consistently the main areas of improvement listed by customers as well as wanting better value for money. (CX111) Developers feel that responding quicker to queries is something Thames Water must do better. (CX33, CX47-51, PR19-70, PR19-71) Developers have expressed dissatisfaction with Thames Water's failure to keep promises, lack off follow-up communication and updates, delays in providing quotes, and dissatisfaction in the quality of information provided. (CX121) Time spent chasing up issues as well as being given incorrect information is also frequently reported as an issue by developers (CX33, CX47-51, CX67) Developers want Thames Water to be more proactive in communicating and updating them, providing a single point of contact and improve understanding of their requirements. They want simplification of quotation and application processes, better co-ordination between teams and improvements to the website. They also encourage Thames Water to improve response times for customer queries, improve delivery timescales and reduce delays. (CX33, CX76-CX81, CX111, CX121) Some developers also reported negative experiences in having to chase up issues and lack of proactive communication from Thames Water. Customers scored Thames Water's quality of communication lower in Q3 2023, indicating they want Thames Water to be more proactive with communications and updates. Customers also indicated that processes need simplifying, improved timescales with faster response times and reductions in delays. These are consistently the main areas of improvement listed by customers as well as wanting better value for money. (CX111)	Insight Sources v18: CX121 Heartbeat of Customer Insight, August 2023 CX111 D-MeX 2022-23 Q4 year 3 review, June 2023 CX109 Thames Water Developers day 2023 Poll Results (27 Feb - 03 Mar 2023), March 2023 Insight Sources v17: CX76-81 Heartbeat of Customer Insight July, August and December 2022 CX95 D-MeX 2021-22 year 2 review, June 2022 CX96 D-MeX 2022-23 Q1 year 3 review, September 2022 CX97 D-MeX 2022-23 Q2 year 3 review, December 2022 Insight Sources pre-v17: CX67 Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints, May 2022 CX33 Thames Water D-MeX (Developer Services) 2021-22 Q2 Summary (Dec 21), December 2021 CX47 D-MeX Year 1 Review, June 2021 CX48 Developer Services Heartbeat Insight, August 2020 CX49 D-MeX 2020-21 Q2 Qual Results, December 2020 CX50-51 D-MeX 2021-22 Q1, Q3 Qual Results, March 2021 Pre 2020 Insight Sources PR19-69 CR56a Developer Day feedback, Populus, November 2016 PR19-70 CR56b Developer Services Deep Dive, Verve, May 2017 PR19-71 CR56c Developer Day pre-survey, Thames Water, January 2018 PR19-72 Delivering outcomes for developers, 2019

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Developers – detailed insights (3/3)

What Developers Want

Sub-topic	Detailed Insights
Small scale developers	Small builders and homeowners with lower complexity projects want a flexible service and proactive communication. (PR19-70) Small developers can be more price sensitive and value transparency and ease of communication. They want a simple process that is published and reliable. They also want online applications, job tracking and account management. (PR19-72)
Large scale developers	Large scale-developers value an ongoing relationship and face-to face interaction with us, especially given the complex and repeat nature of their business. Generally, they want a good understanding of Thames Water processes and to be able to speak to the appropriate, relevant person within Thames Water to get answers quickly. (PR19-72, PR19-73) Customers with highly complex projects (strategic developments, major construction, land developers, qualifying authorities) would like an effortless services with schedules that can be flexible to meet developer needs. They want dependable delivery and cost certainty and transparency over service, process, and policy. Large scale developers want one-to-one relationships that offer continuity. They also want to be able to collaboratively work with Thames Water to find solutions where there are blockers. (PR19-72, PR19-73) Large scale developers want greater co-ordination with Thames Water engineers and other utilities. (PR19-71) Customers with mid-level complexity projects (major home builders and engineering consultants) tend to experience the most frustrations as they can lack a single point of contact. (PR19-70)
Self-lay providers	Self-lay providers (SLPs) have similar needs to large developers, and value personal, ongoing interaction and relationships. (PR19-72). SLPs want dependable delivery without delays from Thames Water that could damage the SLP's relationship with its clients. SLPs also want Thames Water to be transparent, provide them with the tools they need, and to work to promote competition. (PR19-72, PR19-73)
NAVs	Some examples of specific wants from NAVs generally comprise better, more proactive communications from Thames Water, easier/smoother processes (e.g. billing and applications), improved collaboration and data sharing, and fairer pricing. (S43) A number of developers thought there was room for improvement for Thames Water relating to improved communication, simplified processes and better provision of necessary information to NAVs. (CX124)

Key Sources

Insight Sources v18:
S43 Research Summary Form – Developer Services – NAVs. June 2023
CX124 Southern Region PR24 Developer Engagement, August 2023

Pre-2020 Insight Sources:
PR19-70 CR56b Developer Services Deep Dive, Verve, May 2017
PR19-71 CR56c Developer Day pre-survey, Thames Water, January 2018
PR19-72 Delivering outcomes for developers, 2019
PR19-73 Customer Segments, 2019

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Future Bill Payers

Segmented Insights

What Future Bill Payers Want

For Customers	
CS1. I want an easy customer experience and tailored support	Future bill payers are generally less aware of and engaged with Thames Water's wider activities and initiatives. Compared with domestic customers, they also appear to be less satisfied more generally with a number of aspects of Thames Water's core service areas.
AF1. I want fair and affordable bills	Consistent with all audiences.
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	Future bill payers see it as particularly important that emergency measures are in place to secure access to water resources if supplies are interrupted. Future bill payers are generally more supportive of an increased pace of investment in infrastructure and resilience (of both the water and wastewater systems) in the near-term and prefer solutions which are most likely to deliver long-term benefits, as they are acutely aware they will otherwise inherit these issues.

For Communities	
CI1. I want you to give back to the community	Consistent with all audiences.

For 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	Future bill payers place particular importance on reducing emissions and reaching net zero. Future bill payers are particularly keen to be assured that Thames Water are working to reduce pollution and improve river health as quickly as possible.

Segmented Insights

Future Bill Payers – detailed insights (1/2)

What Future Bill Payers Want

Sub-topic	Detailed Insights
Net zero	Future bill payers see reducing emissions and reaching net zero as more of a concern than other customers. (PR24-11) The issue of climate change seems to decrease in importance with age of younger/future customers. Older, more established/settled groups are more concerned about the ongoing cost of living crisis whereas younger groups are more passionate about climate change and the environment. (CX122)
Communication and brand perceptions	Future bill payers less likely to agree with brand values related to direct customer interactions: such as Thames Water being friendly, helpful and easy to deal with, and that they inform of the good they are doing. (CX105) Future bill payers are significantly more likely, compared with Dual + Wastewater customers, to have heard about none of the example Thames Water initiatives. (CX105) Appetite to hear more about Thames Water tends to be lower among future bill payers, with the exception of receiving information on what Thames Water is doing with regards to net zero carbon emissions and protecting/improving plant biodiversity. (CX105) Future bill payers are significantly more likely to claim they have not and would not use a water refill station. (CX105) There are a range of future bill payers who were service users not bill payers:(students; young working adults; living at home; sharing flats/houses; contributing to bills). There are various challenges with future bill payers, mainly that they are distant from Thames Water and are unconscious of how much water they use. Engaging these customers to understand their future needs is considered to be difficult. (PR24-14) Future bill payers want a role in influencing what their bills will look like and expressed a desire to pay more for things like improving the environment and being more sustainable. (S26) Findings correlate with AAT research (CX122): - Future customers are distant from Thames Water - No relationship or bill communication - Growing up with technology has fuelled and enabled hyper present tense mindset and behaviours - Engage at the last minute - Life is about being in the moment - Struggle to engage with the immediate future - Impossible to project to 2030-50

Key Sources

Insight Sources v18:
PR24-14 Acceptability and Affordability Testing (Qualitative findings), May 2023
CX105 Brand survey 2022/23 Future customer analysis, 2022/2023
CX122 Future customers context research, August 2023

Insight Source v17:
S26 Research Summary Form: PR24 Youth Sessions, July 2022

Insight Sources pre-v17:
PR24-11 PR24 Foundational Research: What is important to Future Bill Payers and Business Customers, May 2022

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Future Bill Payers – detailed insights (2/2)

Segmented Insights

What Future Bill Payers Want

Sub-topic	Detailed Insights
Resilience and future investment	Whilst they generally view reducing risk of basements flooding from burst trunk mains as less important than household and non-household customers, future bill payers of have a strong preference for replacing trunk mains as they believe they will inevitably inherit this issue, and so, are motivated to directly address the underlying cause. (PR24-15) Future bill payers have the strongest preference to quicker improvements to 2030 [to reduce supply risk]. As with basement flooding, they are acutely aware it is they who will it is inherit this problem. (PR24-15) Many customers support Thames Water's commitment to have no river pollution by 2050 and to form partnerships in 27 river catchment areas by 2035. The partnership commitment is also supported as it does not impact customer bills. Many want clarity if this represents the earliest achievable date as ideally they'd like to see this work completed as fast as possible (especially true of future bill payers). (PR24-15) Future bill payers especially want to know if [upgrading sewage treatment works] would be funded solely by increases in customer bills. (PR24-15)
Affordability and financial outlook	Cost of living/inflation was by far the most commonly chosen issue of top concern for future customers. This was followed by climate change for younger cohorts and Buying/ renting a home preoccupied the two older cohorts. (CX122) Participants in the three cohorts are aware of and spontaneously raised a range of current affairs when prompted. For most participants this includes the cost of groceries; renting or buying property; gas and electric bills; petrol for driving a car; and tickets for train travel. (CX122) The price of their water bill is not a key concern for participants, even in the context of the cost-of-living crisis. (CX122)

Key Sources

Insight Sources v18:
PR24-15 PR24 Enhancement Case Deep Dive Research, May 2023
CX122 Future customers context research, August 2023

Insight Sources pre-v17:
PR24-11 PR24 Foundational Research: What is important to Future Bill Payers and Business Customers, May 2022

Insight Triangulation Key

Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Segmented Insights

Future Bill Payers – detailed insights (2/2)

What Future Bill Payers Want

Sub-topic	Detailed Insights	Key Sources
Views on water and wastewater service	Future bill payers are generally less satisfied compared with Dual + Wastewater customers more generally with a range of service elements related to the network and water quality, including reliability of supply and sewerage system, quality of water, impact of roadworks, and dealing with leaks. (CX105) Future bill payers and business customers both appreciate a constant supply of consistently clean water as a fundamental service and expect this to continue without interruption or contamination. (PR24-11) Of the water-related issues, river and sea pollution was the most salient; however, only for the 'Young and established cohort' Water pipe leakage and concerns about droughts and drinking water supply were often overlooked by all groups, though less so with increasing age Future customers were reluctant to discuss water-related issues organically. When prompted, there was either vague awareness of the topic or confusion and misinterpretation of events or facts Water as an issue was rarely raised by any participant organically during the discussions, whereas the cost of living crisis dominated the pre-task responses, and the group discussions for all groups Future bill payers feel quite uninformed about how the water network works, leading to the following questions - Future bill payers express greater apathy than other customer groups; they'd like greater engagement from Thames Water	Insight Sources v18: CX105 Brand survey 2022/23 Future customer analysis, 2022/2023 CX122 Future customers context research, August 2023

Insight Triangulation Key	
Robustness of evidence	Med
Divergence of view (by group)	n/a
Regional differences	Low

Appendix A – Insight Sources

Evidence reviewed

These customer, community and stakeholder insights were reviewed for WCCSW v18

PR19

What Customers Want v13 March 19

PR19 Summary of Stakeholder Engagement April 19

PR24

Customer and stakeholder insights

- Foundation – research Oct 21
- PR24 Enhancement areas research Mar 22
- Ofwat / CCW PR24 Collab Research Apr 22
- PR24 Enhancement package options research Sep 22
- PR24 Enhancement case research May 23
- Acceptability and Affordability Testing (Qual) May 23
- 'Your Water, Your Say' May 23
- Future bill payer context research Aug 23
- Acceptability and Affordability Testing (Quant) Sep 23

Ongoing insights

Customer experience insights

- Service Survey Jan 21 to Aug 23
- Social Media Dec 21 to Aug 23
- C-MeX Satisfaction 20/21 – Q1 23/24
- Brand Surveys Q1 20/21 – Q1 23/24
- D-Mex Satisfaction 20/21 – 22/23
- Vulnerability insights Q3 20/21 – Q1 23/24
- BIBDI evaluation Jul 21 – Apr 22
- Leakage immersion May 21 – Jul 23
- Ad hoc customer research (various topics) Jan 21 – Aug 23
- Vulnerability Deep Dive Research Apr 23
- Social / Innovative Tariffs research Sep 22/23

Customer insights for strategic planning

- Water Club Strategic Resource Options Jul – Nov 22
- DWMP research & consultations Sep 21 – Feb 23
- Water Supply Resilience Insights Jan 21
- WRSE (WRMP) research & consultations Mar 21 – May 23
- V2050 and Public Value Research May 22
- LTDS Research Sep 23

Stakeholder and community insights

- Stakeholder Reputation Research Apr-21 – May 23
- Community / stakeholder bilaterals Mar 22-May 23
- Communities and Local Govt Insights Feb 22
- Blueprint for Water Insights Jul 21
- MOSL response Aug 22
- Catchment area partnerships Jan 22
- Stakeholder intelligence tracking Feb – Nov 22

External research

- Ofwat / CCW water customer research (various) May 21 – May 23
- Ofwat / CCW Cost of Living Research (various) May 22 – May 23
- UKCSI – Utilities Sector research Jul 21 – Jan 23
- Net Zero Diaries Sep – Nov 21

Customers | Communities and stakeholders

Approach to weighting evidence sources

Each insight source has been assessed using a scoring system based on HM Treasury Magenta Book Guidance.

- 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 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.

Insights gathered from engagement sources with higher scores are given more weight in the evidence synthesis process.

The overall robustness rating (high, med, low) for each key insight is then based on the average strength of all evidence sources used to derive it.

This approach ensures the most robust engagement sources are used to derive key insights, while also identifying where evidence is relatively weak and could be improve through additional engagement.

Insight Sources

Recent insight sources (2020 onwards)

Customer experience insights (1/2)

Ref	Source name	Date
CX1	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Nov 21)	Dec-21
CX2	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 21)	Jan-22
CX3	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Dec 20)	Jan-21
CX4	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 21)	Feb-21
CX5	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Feb 21)	Mar-21
CX6	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Mar 21)	Apr-21
CX7	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (April 21)	May-21
CX8	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 21)	Jun-21
CX9	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints(Jun 21)	Jul-21
CX10	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jul 21)	Aug-21
CX11	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Aug 21)	Sep-21
CX12	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Sep 21)	Oct-21
CX13	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Oct 21)	Nov-21
CX14	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jan 22)	Feb-22
CX15	Social Media health check (Jan 22)	Jan-22
CX16	Social Media health check (Feb 22)	Feb-22
CX17	Social Media health check (Dec 21)	Dec-21
CX18	C-MeX Year 1 Review: Customer Research & Insight (May 21)	May-21
CX19	C-MeX Q1 Year 2 (2021-22) headlines: Customer Research & Insight (Jul 21)	Jul-21
CX20	C-Mex Q2 Year 2 (2021-22) headlines: Customer Research & Insight (Oct 21)	Oct-21
CX21	C-MeX Q3 Year 2 (2021-22) Headlines (Feb 22)	Feb-22
CX22	Brand Survey (Q1 2021/22)	Jun-21
CX23	Brand Survey (Q2 2021/22)	Sep-21
CX24	Brand Survey (Q3 2021/22)	Dec-21
CX25	Brand Campaign Testing - Research Report (Feb 22)	Feb-22
CX26	Household - Written complaint details (Jan 22)	Jan-22
CX27	Affordability Re-imagined Journey Design Workshop Playback from 21/10/21	Oct-21
CX28	Insight & Discovery Pack Query Bill (metered and unmeasured) Re-imagined Journey	Oct-21
CX29	Thames Water Customer Voices Polls and Forums Key Insights 2021-2022	Jan-22
CX30	Thames Water Customer Voices: Strapline Research (Aug 21)	Jun-21

Ref	Source Name	Date
CX31	Thames Water Customer Voices: Strapline Research Round 2 (Aug 21)	Aug-21
CX32	Thames Water Customer Voices: Welcome Letter Evaluation (Aug 21)	Aug-21
CX33	Thames Water D-MeX (Developer Services) 2021-22 Q2 Summary (Dec 21)	Dec-21
CX34	CCW Water Matters Annual Survey (Jun 21)	Jun-21
CX35	CCW research on SME customers' preferences for meter reading frequencies (Aug 21)	Aug-21
CX36	Thames Water Board and Customer Engagement Session on Leakage (May 21)	May-21
CX37	Leakage Website Report Testing (Jan 22)	Jan-22
CX38	Over 80s Priority Services Register auto-enrolment Follow up customer research (Apr 21)	Apr-21
CX39	Priority Services Register auto-enrolment via London Fire Brigade visits (Sep 21)	Sep-21
CX40	Vulnerability customer insight 2022 (BSi Audit) (Jan 22)	Jan-22
CX41	Utility Week Insight Report: Levelling up debt journeys for vulnerable customers	Feb-22
CX42	non-household smart meters and data research (Jul 21)	Jul-21
CX43	Bin it, don't block it' Behaviour Research (Jul 21)	Jul-21
CX44	Bin it, Don't Block It' Radio Advert Research (Jan 22)	Jan-22
CX45	Thames Water Board and Customer Engagement Session on Leakage (Jul 20)	Jul-20
CX46	Bill Redesign Research: Qualitative Debrief	Aug-21
CX47	D-MeX Year 1 Review	Jun-21
CX48	Developer Services Heartbeat Insight	Aug-20
CX49	D-MeX 2020-21 Q2 Qual Results	Dec-20
CX50	D-MeX 2021-22 Q1 Qual Results	Sep-21
CX51	D-MeX 2021-22 Q3 Summary	Mar-22
CX52	R-MeX Report, December 2020	Dec-20
CX53	R-MeX Report, August 2021	Aug-21
CX54	R-MeX Report, February 2022	Feb-22
CX55	Billing Content: Testing Insights	Dec-21
CX56	Submit Meter Reading	Sep-21
CX57	Affordability Personas Insight Discovery	Aug-21
CX58	Vulnerability Customer Insight BSI Audit	Mar-22
CX59	Developer Services Segments Results 21-22	Feb-22
CX60	Sewer Flooding Journey Insight – Opportunity platforms for workshop	Sep-21

Insight Sources

New for WCCSW v18

Recent insight sources (2020 onwards)

Customer experience insights (2/2)

Ref	Source name	Date
CX61	Service Survey Phase 1 Deep Dive Keywords	Feb-22
CX62	Brand Survey (Q4 2021/22)	Mar-22
CX63	Customer Voices Polls & Forums 22-23 Summary	May-22
CX64	CCW Research Report Water Matters 2021-2022 - Summary of research findings for Thames Water	Jul-22
CX65	Water Community Insights Summary - Topic: Sewage	May-22
CX66	C-MeX Q4 Year 2 (2021-22) Headlines (May 22)	May-22
CX67	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (May 22)	May-22
CX68	Water Recycling Communications: Qualitative findings	Jun-22
CX69	Customers in vulnerable circumstances - quarterly research and insight report (Q4 21-22)	May-22
CX70	'Bin it, Don't Block it' Campaign evaluation (post-wave)	Apr-22
CX71	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Apr 22)	Apr-22
CX72	Brand Regional Analysis Q3 2021-22	Mar-22
CX73	Heartbeat of Customer Insight: Improving Satisfaction, Reducing Complaints (Jun 22)	Jun-22
CX74	Thames Water Water Saving Survey	May-22
CX75	Written Complaints Report	Jun-22
CX76	Heartbeat of Customer Insight July 2022	Jul-22
CX77	Heartbeat of Customer Insight August 2022	Aug-22
CX78	Heartbeat of Customer Insight September 2022	Sep-22
CX79	Heartbeat of Customer Insight October 2022	Oct-22
CX80	Heartbeat of Customer Insight November 2022	Nov-22
CX81	Heartbeat of Customer Insight December 2022	Dec-22
CX82	Social Tariff Research Sep 22	Sep-22
CX83	Leakage customer immersion 2022	Aug-22
CX84	Vulnerability Insight Report 2022-23 Q1	Aug-22
CX86	Research Summary Form - Developer Scrutiny Panel	Sep-22
CX87	Water efficiency campaign evaluation	Aug-22
CX88	Brand Survey Q1 2022-23	Jun-22
CX89	C-MeX CES and Brand Survey Insights Q2 2022-2023	Sep-22
CX90	Vulnerability desk based research slide deck	Nov-22
CX91	Vulnerability insight report 2022-23 Q2	Nov-22
CX92	C-MeX Q1 2022-23 Overview	Jul-22
CX93	C-MeX Q2 2022-23 Overview	Nov-22
CX94	Advertising Messages Testing Final Results	Jan-23

Ref	Source Name	Date
CX95	D-MeX 2021-22 year 2 review	Jun-22
CX96	D-MeX 2022-23 Q1 year 3 review	Sep-22
CX97	D-MeX 2022-23 Q2 year 3 review	Dec-22
CX98	Flexible Payment Plan Customer Research	Dec-20
CX99	Retailer Measure of Experience Outputs Survey	Sep-22
CX100	UX - Affordability persona insight discovery 2021 (part 2)	Oct-21
CX101	Heartbeat of Customer Insight May 2023	May-23
CX102	C-MeX CES and Brand Survey Insights Q3 2022-2023	Dec-23
CX103	Heartbeat of Customer Insight June 2023	Jun-23
CX104	Thames Water perception & behaviour research	May-23
CX105	Brand survey 2022/23 Future customer analysis	2022/2023
CX106	Thames Water Customer Voices Polls - Key Insights 2021-2022	May-23
CX107	D-MeX 2022-23 Q3 year 3 review	Mar-23
CX108	Thames Water Developers day 2023	2023
CX109	Thames Water Developers day 2023 Poll Results (27 Feb - 03 Mar 2023)	Feb to Mar-23
CX110	CCW Water Matters 2022 (Thames Water results and full data report)	Apr-23
CX111	D-MeX 2022-23 Q4 year 3 review	June-23
CX112	R-MeX report February 2023	Feb-23
CX113	Vulnerability Deep Dive research	Apr-23
CX114	C-MeX CES and Brand Survey Insights Q4 2022-2023	Mar-23
CX115	Heartbeat of Customer Insight February 2023	Feb-23
CX116	Heartbeat of Customer Insight March 2023	Mar-23
CX117	Heartbeat of Customer Insight July 2023	Jul-23
CX118	Vulnerability insight report 2022-2023 Q3	Feb-23
CX119	Vulnerability insight report 2022-2023 Q4	May-23
CX120	C-MeX CES and Brand Survey Insights Q1 2023-2024	Aug-23
CX121	Heartbeat of Customer Insight August 2023	Aug-23
CX122	Future Customers context	Aug-23
CX123	Leakage customers immersion 2023	Jul-23
CX124	Southern Region PR24 Developer Engagement	Jul-23
CX125	UKCSI report July 2023	Jul-23
CX126	Vulnerability insight report 2023-2024 Q1	Aug-23
CX127	Otis (Brand platform) 2023 Campaign Evaluation (Post-wave)	Aug-23
CX128	Innovative tariffs research	Sep-23

Insight Sources

Recent insight sources (2020 onwards)

Customer insights for strategic planning

Ref	Source name	Date
SP1	WRSE - Drought Communication Research - Quant (Jun 21)	Jun-21
SP2	WRSE - Drought Communication Research - Qual (June 21)	Jun-21
SP3	WRSE Workshop 1 - Data review (Annex from full workshop document)	Jan-22
SP4	WSRE - Customer Preferences to Inform Long-term Water Resource Planning (Mar 21)	Mar-21
SP5	Water Supply System Resilience Programme - Customer Research (Qualitative Findings) (Dec 20)	Dec-20
SP6	Water Supply System Resilience Programme - Customer Research (Quantitative Findings) (Jan 2021)	Jan-21
SP8	DWMP - Customer Research: Part 2 Qualitative Research: Final Report (Oct 21)	Oct-21
SP9	DWMP Customer Research (Quantitative)	Nov-21
SP10	Non-compliance in Sewage Treatment Works: Findings from qualitative research with customers (Dec 21)	Dec-21
SP11	Smarter Water Catchment Survey (Nov 21)	Nov-21
SP12	Vision 2050 Research	May-22
SP13	WRSE Emerging Regional Plan Consultation Response Document - May 2022	May-22
SP14	WRSE Water resources Quant Research	Jun-22
SP15	Thames Water Customer Voices Public Value Research	May-22
SP16	DWMP Consultation Customer Research Summary Report	Sep-22
SP18	Water Club - Strategic Resource Options - Added value research	Nov-22
SP19	WRSE Best Value Criteria Customer Research	May-21
SP20	DWMP consultation, You said we did	Feb-23
SP21	Thames Water WRMP Customer Consultation	May-23
SP22	WRSE Customer Research Regional Plan Preferences Thames Water Summary Report	Jun-23
SP23	WRMP24 Customer Summary	Aug-23
SP24	Long-Term Delivery Strategy Research	Sep-23

PR24 customer and stakeholder insights

Ref	Source name	Date
PR24-1	PR24 Foundational Research - An analysis of customer views and expectation of Thames Water (Nov 21)	Nov-21
PR24-2	PR24 Foundational Research - Customer Voices (Nov 21)	Nov-21
PR24-3	PR24 Foundational Research – Social Media (Nov 21)	Nov-21
PR24-4	Deep Dive: Net Zero (Feb 22)	Feb-22
PR24-5	Deep Dive: Bathing Water (Feb 22)	Feb-22
PR24-6	Deep Dive: River Spills (Feb 22)	Feb-22
PR24-7	Deep Dive: Sustainable Abstraction (Feb 22)	Feb-22
PR24-8	Deep Dive: Lead Pipes (Feb 22)	Feb-22
PR24-9	Deep Dive: Waste System Headroom	Feb-22
PR24-10	Deep Dive: Trunk Mains and Replumb London (Feb 22)	Feb-22
PR24-11	PR24 Foundational Research: What is important to Future Bill Payers and Business Customers	May-22
PR24-12	PR24 Enhancement Package Options research	Sep-22
PR24-13	Enhancement cases deep dive summary	Feb-22
PR24-14	Acceptability and Affordability Testing (Qualitative findings)	May-23
PR24-15	Enhancement cases deep dive research	May-23
PR24-16	Your Water, Your Say Open Challenge session	May-23
PR24-17	Acceptability and Affordability Testing (Quantitative findings)	Sep-23

New for WCCSW v18

Insight Sources

Recent insight sources (2020 onwards)

Stakeholder and community insights

Ref	Source name	Date
S1	Stakeholder Asks (Feb 22)	Feb-22
S2	Vision 2050 stakeholder feedback summary (Jul 21)	Jul-21
S3	Water Efficiency Strategy 2.0 - 1st Consultation Responses (Jul 21)	Jul-21
S4	Catchment Area Partnerships - Covid-19 Comms Survey Responses 2021 (Jan 22)	Jan-22
S5	Stakeholder Reputation Research (Apr 21)	Apr-21
S6	Communities and Local Govt Insights (Jun 21)	Jun-21
S7	Blueprint for Water Insights (Jul 21)	Jul-21
S8	PR19 Summary of Stakeholder Engagement	Apr-19
S9	Research Summary Form – PR24 GLA Sessions	Mar-22
S10	GLA PR24 Feedback Form (Waste)	Mar-22
S11	GLA PR24 Feedback Form (Water)	Mar-22
S12	Research Summary Form – PR24 London First Sessions	Mar-22
S13	CCW Sewer Flooding Misery Workshop	Sep-21
S14	Stakeholder Reputation Research (Mar 22)	Mar-22
S15	Alva Stakeholder Intelligence Feb 2022	Feb-22
S16	Alva Stakeholder Intelligence Mar 2022	Mar-22
S17	Alva Stakeholder Intelligence Apr 2022	Apr-22
S18	Research Summary Form - Local Government	Jun-22
S19	Research Summary Form - Insurance Stakeholders	May-22
S20	Research Summary Form – Communities impacted by Capital Delivery	Jun-22
S21	Alva Stakeholder Intelligence May 2022	May-22
S22	Research Summary Form - Capital Delivery Non-infrastructure partners	Aug-22
S23	Research Summary Form - Capital Delivery Partner - Galliford Try	Sep-22
S24	Research Summary Form - Capital Delivery Partner - MWH	Sep-22
S25	Research Summary Form - Environment Agency	Sep-22
S26	Research Summary Form - PR24 Youth session	Jul-22
S27	Research Summary Form - Retailer engagement	Jul-22
S28	Research Summary Form - Capital Delivery Partner - Tilbury Douglas	Sep-22
S29	Alva Stakeholder Intelligence Jun 2022	Jun-22
S30	Alva Stakeholder Intelligence Jul 2022	Jul-22

Ref	Source name	Date
S31	Alva Stakeholder Intelligence Aug 2022	Aug-22
S32	Alva Stakeholder Intelligence Sep 2022	Sep-22
S33	Alva Stakeholder Intelligence Oct 2022	Oct-22
S34	Alva Stakeholder Intelligence Nov 2022	Nov-22
S35	Ofwat Letter to CEOs - DWMP Consultation Response	Oct-22
S36	MOSL PR24 non-household Market Trading Party Workshops Summary	Aug-22
S37	Research Summary Form - Stakeholder meeting on reimagining tariffs and charges	Nov-22
S38	Elected representative issues tracker	Mar-23
S39	Stakeholder Reputation Research	Mar-23
S40	Research Summary Form - Home Builders Federation	May-23
S41	Research Summary Form - Berkeley Group	May-23
S42	Research Summary Form - GLA and Utility Week	May-23
S43	Research Summary Form – Developer Services – NAVs	Jun-23

New for WCCSW v18

Insight Sources

Recent insight sources (2020 onwards)

External and collaborative research

Ref	Source name	Date
R1	Net Zero Diaries Wave 1 (Sep 21)	Sep-21
R2	Net Zero Diaries Wave 2: What do citizens want from government? (Oct 21)	Oct-21
R3	Net Zero Diaries Wave 3: What do citizens want from businesses? (Nov 21)	Nov-21
R9	MOSL response to Ofwat's PR24 and beyond: Performance commitments for future price reviews discussion paper and consultation	Jan-22
R10	UKSCI January 2022 Results - Utilities Sector Resource Pack	Jan-22
R11	UKSCI (UK Customer Satisfaction Index) Utilities Sector Report (Jul 21)	Jul-21
R12	Water UK - UK Omnibus Research 2021 Report (Dec 21)	Dec-21
R13	CCW WaterVoice Window 4 Summary Report	Jun-20
R14	Ofwat Customer Spotlight Report - Peoples' views and experiences of water	Apr-22
R15	Ofwat + CCW Customer Preferences Research, April 2022	Apr-22
R16	MACRO4 - Giving UK Utility Customers a Voice	Feb-22
R17	Ofwat - Cost of Living: Water Customers' Experiences final report	May-22
R18	Red Wall Omnibus - Topical polling	Apr-22
R19	StepChange Statistics Yearbook 2021	Dec-21
R24	CCW Water Awareness Report	May-22
R25	Institute of Customer Service Trends 2022	Dec-21
R26	UKSCI January 2022 Utilities Sector Results	Jan-22
R28	CCW Current and future customers	Feb-21
R29	CCW Awareness and perceptions of river water quality	Apr-22

Ref	Source name	Date
R36	Cost of living diaries, BritainThinks	Nov-22
R37	CCW Sink Sense: Kitchen sink habits caught on camera	Jun-21
R38	Ofwat - Cost of living: Wave two - water customers' experiences	Dec-22
R39	CCW - Household complaints report	Mar-22
R40	CCW Water Matters Highlights Report 2021	Jul-22
R41	CCW - Bridging the gap: Awareness and Understanding of Water Issues	Nov-22
R42	CCW + Ofwat Business Customer Survey 2022	Oct-22
R43	Roundtable: Understanding to impact of the Cost of Living on the Water Sector	Sep-22
R44	Hosepipe ban research	Sep-22
R45	Testing the Water 2022: Highlights report	Jan-23
R46	CCW 5 Years of the water retail open market	Jul-22
R47	CCW Synthesis of the business retail market	Jan-23
R48	CCW Lifting the Lid research	Jan-23
R49	Smart thinking: metering for business customers	Mar-23
R50	CAP Taking on UK poverty	May-23
R51	CCW Perceptions and trust in water companies	Feb-23
R52	Customer licence condition research	Mar-23
R53	Ofwat - Cost of living: Wave three - water customers' experiences	May-23
R54	CCW Guaranteed Standards Scheme research	Jul-23
R55	CCW Citizens Forum: Customers' views on water campaigns	Mar-23
R56	Trust and perceptions: Peoples' views on the water sector	Feb-23
R57	Non-Household SME Customer Insight Report	Jun-20
R58	Savanta - Water privatisation vs nationalisation	Jun-23

New for WCCSW v18

Insight Sources

Key PR19 Insight Sources

Ref	Source name	Date	Reference in WCW v13
PR19-1	CR06 Thames Water Foundation Review, Accent (2015)	2015	WCW13 pg49
PR19-2	CR07 PR19 Deliberative Research, BritainThinks (Mar 2016)	Mar-16	WCW13 pg66
PR19-3	CR12d Biodiversity online community task	Jan-18	WCW13 pg82
PR19-4	CR19 Intergenerational fairness, BritainThinks (Oct 2016)	Oct-16	WCW13 pg60, pg71
PR19-5	CR20 Future Trends Outputs for planning , Forestry Factory (Dec 2017)	Dec-17	WCW13 pg24, 61, 64, 81, 88
PR19-6	CR26a Deep dives, interruptions to supply, BritainThinks (Sep 2016)	Sep-16	WCW13 pg40
PR19-7	CR26c Deep Dives, Odour BritainThinks (Sep 2016)	Sep-16	WCW13 pg86, pg87
PR19-8	CR26c Deep Dives, River Quality, BritainThinks (Sep 2016)	Sep-16	WCW13 pg77
PR19-9	CR26d Deep Dives, sewer flooding and blockages, BritainThinks (Oct 2016)	Oct-16	WCW pg53
PR19-11	CR26e Deep dives, water hardness, BritainThinks (Sep 2016)	Sep-16	WCW13 pg49
PR19-12	CR29c Leakage research, BritainThinks (Apr 2017)	Apr-17	WCW13 pg45
PR19-13	CR32 Being a good neighbour, BritainThinks (Mar 2017)	Mar-17	WCW13 pg82, pg83, pg84, pg85
PR19-14	CR41 Stage 1 Customer preferences research, effect/ICS (Apr 2017)	Apr-17	WCW13 pg36, 37, 57
PR19-15	CR43a/b Stage 2 customer preferences research - water resources level of service and options, effect/ICS (May 2017)	May-17	WCW13 pg61, 62
PR19-16	CR43b Stage 2 customer preferences research - water resource options, effect/ICS (Apr 2017)	Apr-17	WCW13 pg43
PR19-17	CR43d Stage 2 customer preferences research - sewer flooding. effect/ICS (Jun 2017)	Jun-17	WCW pg52, 55
PR19-18	CR43e Stage 2 customer preferences research - water services. effect/ICS (May 2017)	May-17	WCW13 pg47
PR19-19	CR52 Resilience Deep Dive, BritainThinks (Feb 2017)	Feb-17	WCW pg60, 66, 68, 81
PR19-20	CR58b Vulnerability Customer Insight (Mar 2018)	Mar-18	WCW13 pg74, 76
PR19-21	CR58c Social Tariffs, Populus (Mar 2018)	Mar-18	WCW13 pg70
PR19-22	CR61c PR14 Reconciliation online community task, BritainThinks (Aug 2018)	Aug-18	WCW13 pg73
PR19-23	CR61b Reduced bill profile online community task, BritainThinks (May 2018)	May-18	WCW13 pg73
PR19-24	CR63 Customer valuation testing, effect/ICS (Feb 2018)	Feb-18	WCW13 pg80
PR19-25	CR65 Water Trading, Verve (Jun 2018)	Jul-18	WCW13 pg64
PR19-26	CR66 Corporate and Financial Responsibility, BritainThinks (Jul 2018)	Jul-18	WCW13 pg88
PR19-29	CX04 NPS Brand Tracker, Populus (2015-2019)	2015-2019	WCW13 pg70
PR19-30	CX06 Brand interactions (2015)	2015	WCW13 pg. 19
PR19-31	CX25 Customer Expectations, Populus (May 2016)	May-16	WCW pg54, WCW13 pg57
PR19-33	CX26 Customer Journey Mapping (2015-2017)	2015-2017	WCW13 pg30
PR19-34	CX26a Customer Journey Mapping – no water, Thames Water (2015-2017)	2015-2017	WCW13 pg41
PR19-35	CX26b Customer Journey Mapping – visible leaks, Thames Water (2015-2017)	2015-2017	WCW13 pg42,44
PR19-36	CX26c Customer Journey Mapping – customer side leakage, Thames Water (2015-2017)	2015-2017	WCW pg46
PR19-37	CX26d Customer Journey Mapping – sewer blockage and smells and floods, Thames Water (2015-2017)	2015-2017	WCW pg56

Insight Sources

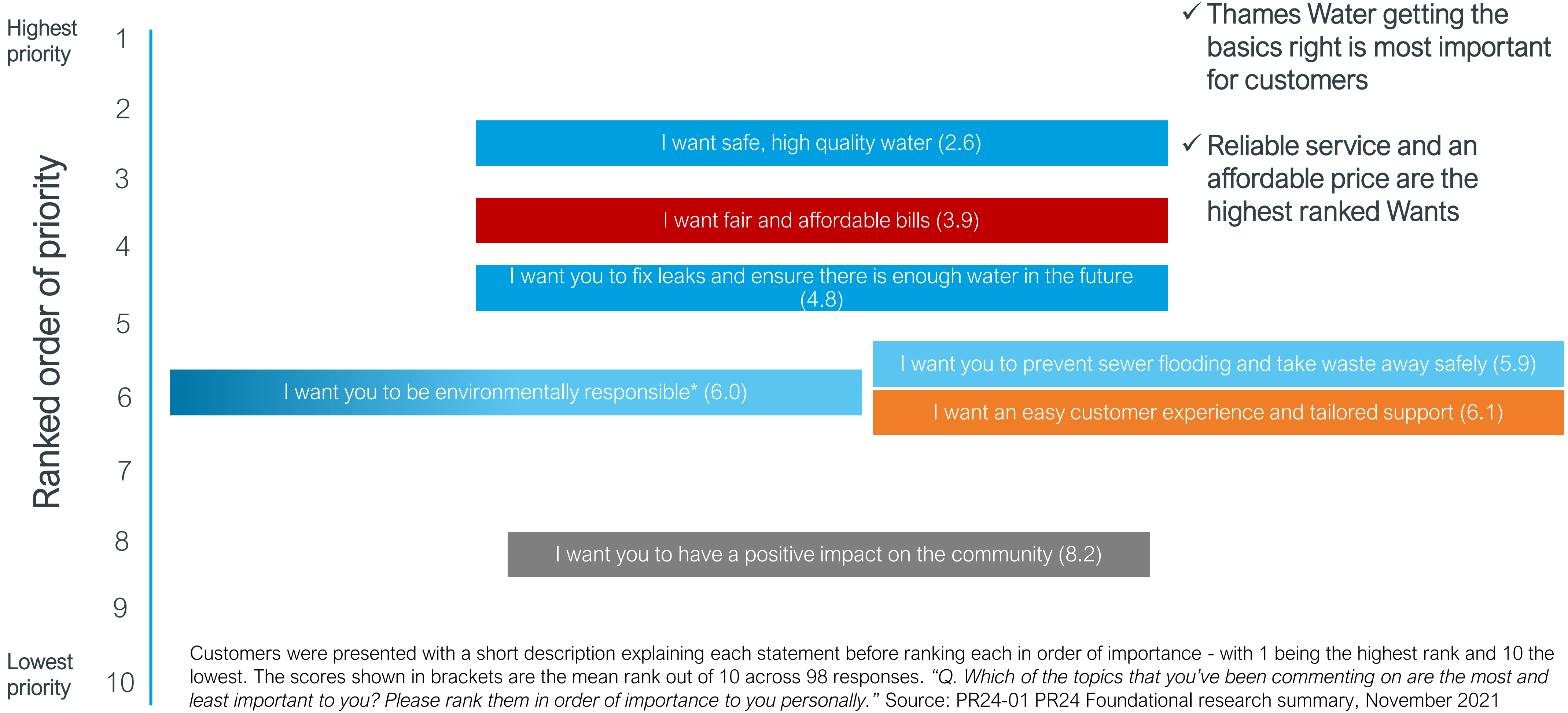
Key PR19 Insight Sources

Ref	Source name	Date	Reference in WCW v13
PR19-38	CX36 Rant & Rave Customer Insight Pack, Thames Water (Jan 2017)	Jan-17	WCW13 pg39, 35, 51
PR19-39	CX42a/b Water efficiency campaigns, Populus (May 2018)	2017-2018	WCW13 pg65
PR19-40	CX43 Customer Promises workshop, Thames Water (2017)	2017	WCW13 pg39
PR19-41	CX45b Performance data PSR numbers, Thames Water, May 2018/)	May-18	WCW13 pg75
PR19-42	CX51 Water bottle refills, Verbalisation (Feb 2018)	Feb-18	WCW13 pg38
PR19-43	EX03 Consumer attitudes to tap water, CCW (2016)	2016	WCW13 pg38
PR19-44	EX04 Attitudes to Infrastructure in Great Britain, Copper Consultancy, PBA (2015)	2015	WCW13 pg66
PR19-45	EX13 Water saving, CCW (Oct 2017)	Oct-17	WCW13 pg61, 62, 65
PR19-46	EX18 Essential services and people with mental health problems, BritainThinks (May 2018)	May-18	WCW13 pg75
PR19-47	EX20 National Infrastructure Commission public research (May 2018)	May-18	WCW13 pg61
PR19-48	EX21 Getting a good deal on a low income, BritainThinks (Dec 2018)	Dec-18	WCW13 pg73
PR19-49	EX22 UKCSI, Institute of Customer Service (2019)	2019	WCW13 pg23
PR19-50	EX14 ICS service trends (Dec 2017)	Dec-17	WCW13 pg. 21 & 61
PR19-51	EX01 Tap water avertive study (2013)	2013	WCW13 pg. 38 & 49
PR19-52	CR61a Lead pipes online community task (May 2018)	May-18	WCW13 pg. 38
PR19-53	CR26f Deep Dives, Water Pressure (Sep 2016)	Sep-16	WCW13 pg. 47 & 48
PR19-54	EX02 Water Matters (2017)	2017	WCW13 pg. 49. 51 & 70
PR19-55	PV01 Water Resources Follow up (2013)	2013	WCW13 pg. 43, 45, 64 & 65
PR19-56	CX44a Journey Data Calls and Complaints (2016)	2016	WCW13 pg. 43
PR19-57	CX29 Hatton Garden Streetworks, Populus (May 2016)	May-16	WCW13 pg. 84
PR19-58	CR29a WRMP Stage 1, (BritainThinks, Oct 16)	Oct-16	WCW13 pg. 60, 64, 65 & 95
PR19-59	CR03 TTT customer understanding, Populus, (Mar 2018)	Mar-18	WCW13 pg. 60, 66 & 68
PR19-60	CX34 Enfield Metering, Populus, July 2016	Jul-16	-
PR19-61	CR69 Drought Resilience & Chalk Streams, BritainThinks, Mar 19	Mar-19	WCW13 pg. 64 & 78
PR19-62	CR67 NE London Resilience, eftec/ICS, Jan 19	Jan-19	WCW13 pg. 60 & 75
PR19-63	CR08a/b Deliberative overlays, BritainThinks, March 2016	Mar-16	WCW13 pg. 70, 75 & 93
PR19-64	CR22 Social Tariffs, Populus, December 2016	Dec-16	WCW13 pg. 70 & 74
PR19-65	CR29b WRMP Stage 2, BritainThinks, December 2016	Dec-16	WCW13 pg. 75 & 98
PR19-66	PV07a/b/c Revenue allocation research, Populus, September 2014	Sep-14	WCW13 pg. 73
PR19-67	CX60 Priority Services Register NPS, Populus, March 2019	Mar-19	WCW13 pg. 75
PR19-68	CX45c Performance data to CCW, Thames Water, 2017/18	2017-18	WCW13 pg. 74, 75 & 92
PR19-69	CR56a Developer Day feedback, Populus, November 2016	Nov-16	WCW13 pg. 96
PR19-70	CR56b Developer Services Deep Dive, Verve, May 2017	May-17	WCW13 pg. 96
PR19-71	CR56c Developer Day pre-survey, Thames Water, January 2018	Jan-18	WCW13 pg. 96
PR19-72	Delivering outcomes for developers	2019	-
PR19-73	Developer services customer segments	2019	-

Appendix B – Prioritisation insights

Customers' relative priority of key Wants

A clear hierarchy of priorities was evident when household customers ranked Wants in our PR24 Foundation research



- ✓ Thames Water getting the basics right is most important for customers
- ✓ Reliable service and an affordable price are the highest ranked Wants

Customers were presented with a short description explaining each statement before ranking each in order of importance - with 1 being the highest rank and 10 the lowest. The scores shown in brackets are the mean rank out of 10 across 98 responses. *"Q. Which of the topics that you've been commenting on are the most and least important to you? Please rank them in order of importance to you personally."* Source: PR24-01 PR24 Foundational research summary, November 2021

***** *'Environmentally Responsible' was tested at the Outcome level in the PR24 Foundation Research. Cleaner Rivers (River Health), Green Energy (Net Zero) and Always enough water (Sustainable Abstraction) were tested originally as part of this outcome*

Customer Prioritisation

Customer preferences on draft common PC's

17 draft common performance commitments were tested across all water companies in Ofwat's collaborative research. An initial view of customer priorities on the relative importance (High, Mid, Low) of specific PR24 performance commitments emerged.

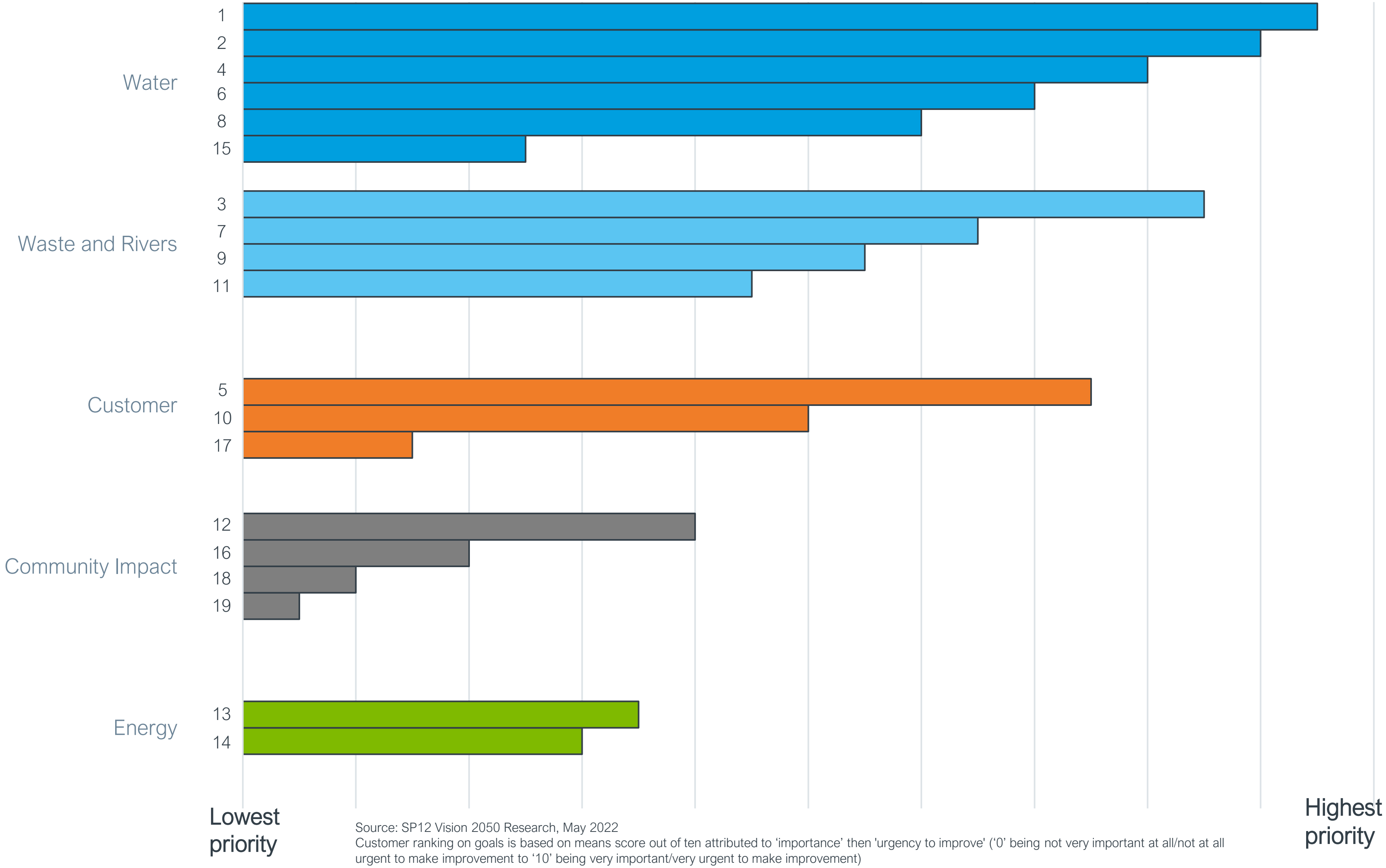
	Water PCs	Wastewater PCs	Environment PCs*	Customer PCs
High importance	Water supply interruption Appearance, taste and smell of tap water Do not drink notice	Internal sewer flooding External sewer flooding		
Middle importance	Boil water notice Leakage		Pollution incidents River water quality Biodiversity	
Lower importance	Severe drought Hose pipe ban Non-essential use ban for businesses	Storm overflows	Carbon Bathing water quality	Customer satisfaction

*Environmental PCs cut across Water, Wastewater and Community

Source: R15 Ofwat + CCW Customer Preferences Research, April 2022.
Base: 86 household and non-household customers from across all water companies in England and Wales

Customers' relative priority of Vision 2050 Goals

Priorities in V2050 research were broadly aligned with PR24 Foundation research, with customers placing high priority on us ensuring sufficient, high quality drinking water now and into the future, and eliminating incidents of sewer flooding

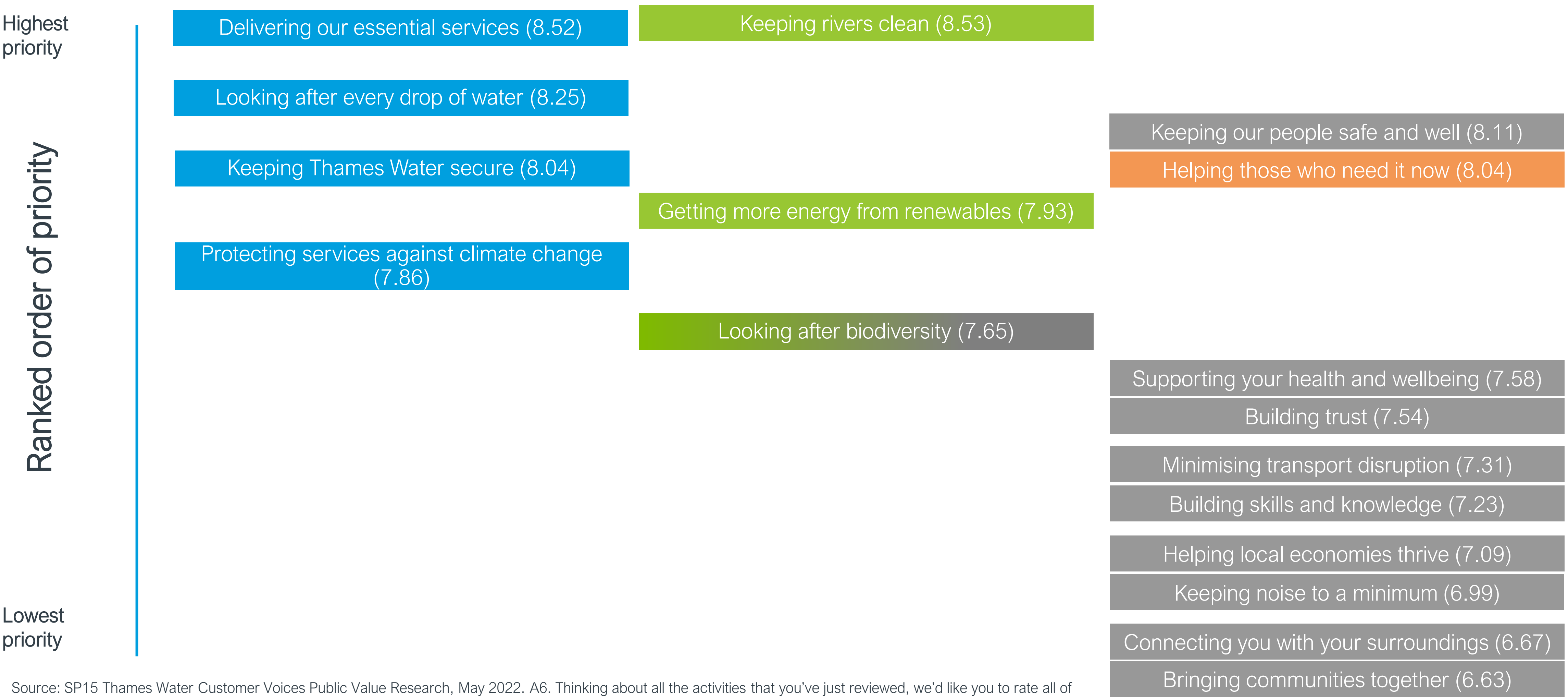


Source: SP12 Vision 2050 Research, May 2022
Customer ranking on goals is based on means score out of ten attributed to 'importance' then 'urgency to improve' ('0' being not very important at all/not at all urgent to make improvement to '10' being very important/very urgent to make improvement)

Ranking	Vision 2050 Goal
1	Guarantee high quality drinking water
2	Ensure there is enough water for customers without taking too much from rivers and harming the environment
3	Stop all sewerage flooding into homes, gardens and businesses
4	Reduce leakage to below 10%
5	Keep bills affordable
6	Provide a reliable supply of water
7	Prevent heavy rainfall from causing sewage overflows and sewage spills into rivers
8	Replace all lead pipes
9	Lead the improvement of rivers in our region to become among the healthiest in the UK
10	Fix service issues on the same day
11	Help reduce disruptive rainwater flooding
12	Provide an inclusive service that works for everybody and that everyone can afford
13	Maximise the green energy produced for Thames Water and local communities
14	Help tackle climate change by becoming 'net negative'
15	Help customers use much less water at home
16	Use the land Thames Water owns to benefit wildlife and create natural space for people to visit
17	Provide an easy and personalised customer service for everyone, using the latest technology
18	Create attractive jobs for people in our communities and help develop skills
19	Use the land Thames Water owns to create jobs and housing

Customers' relative priority of Public Value activities

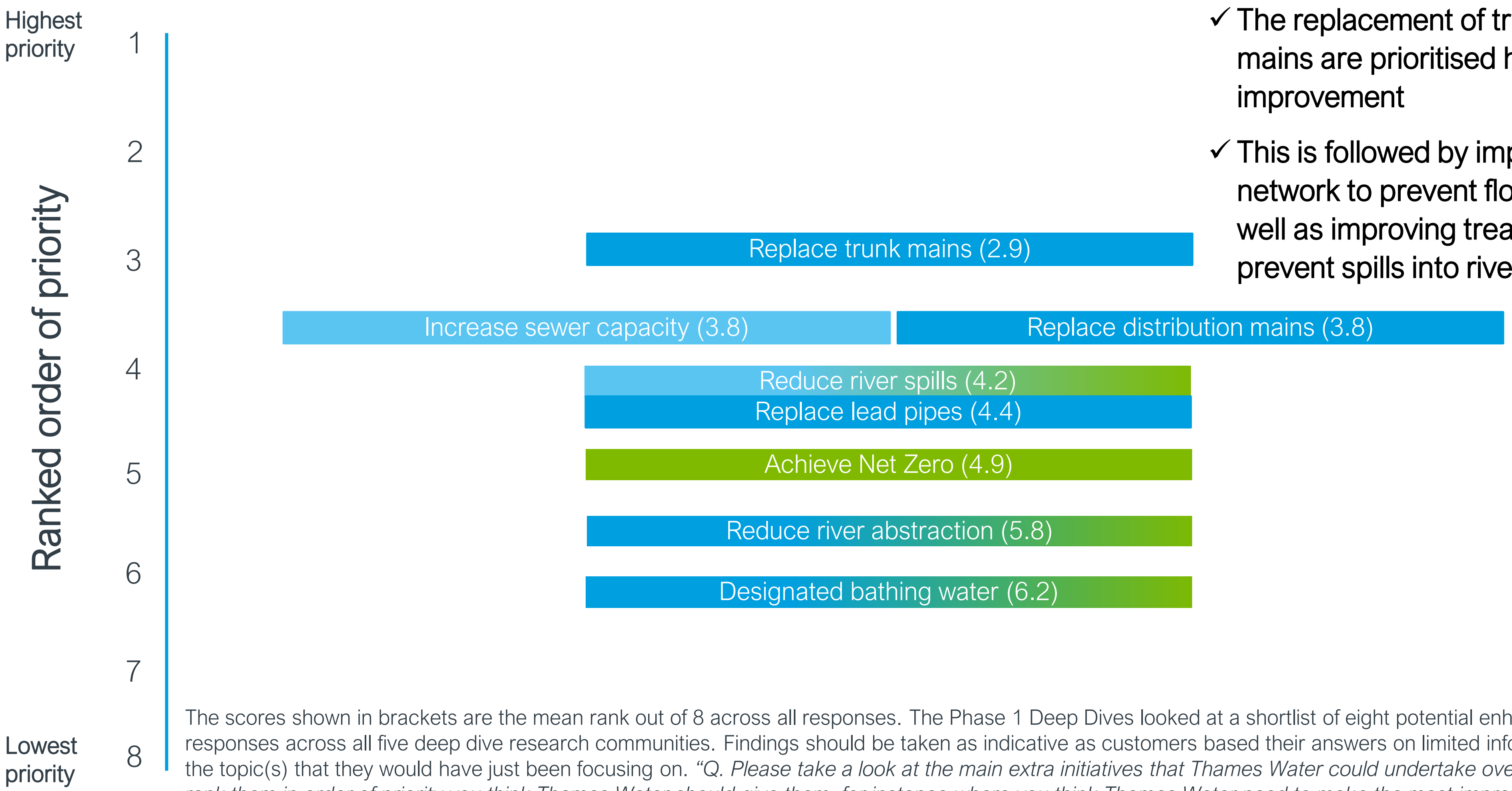
Customers prioritise river cleanliness and the delivery of essential services as key Public Value activities



Source: SP15 Thames Water Customer Voices Public Value Research, May 2022. A6. Thinking about all the activities that you've just reviewed, we'd like you to rate all of them in terms of how much priority you want Thames Water to allocate to each in the coming years, on a scale of 0-10, where 0 is 'no priority at all' and 10 is 'very high priority'? Base: All respondents (698)

Customers' relative priority of enhancement areas

A hierarchy of priorities is evident when customers rank eight potential enhancement areas (and corresponding service improvements)



- ✓ The replacement of trunk and distribution mains are prioritised highest for improvement
- ✓ This is followed by improving the sewer network to prevent flooding into homes as well as improving treatment works to prevent spills into rivers

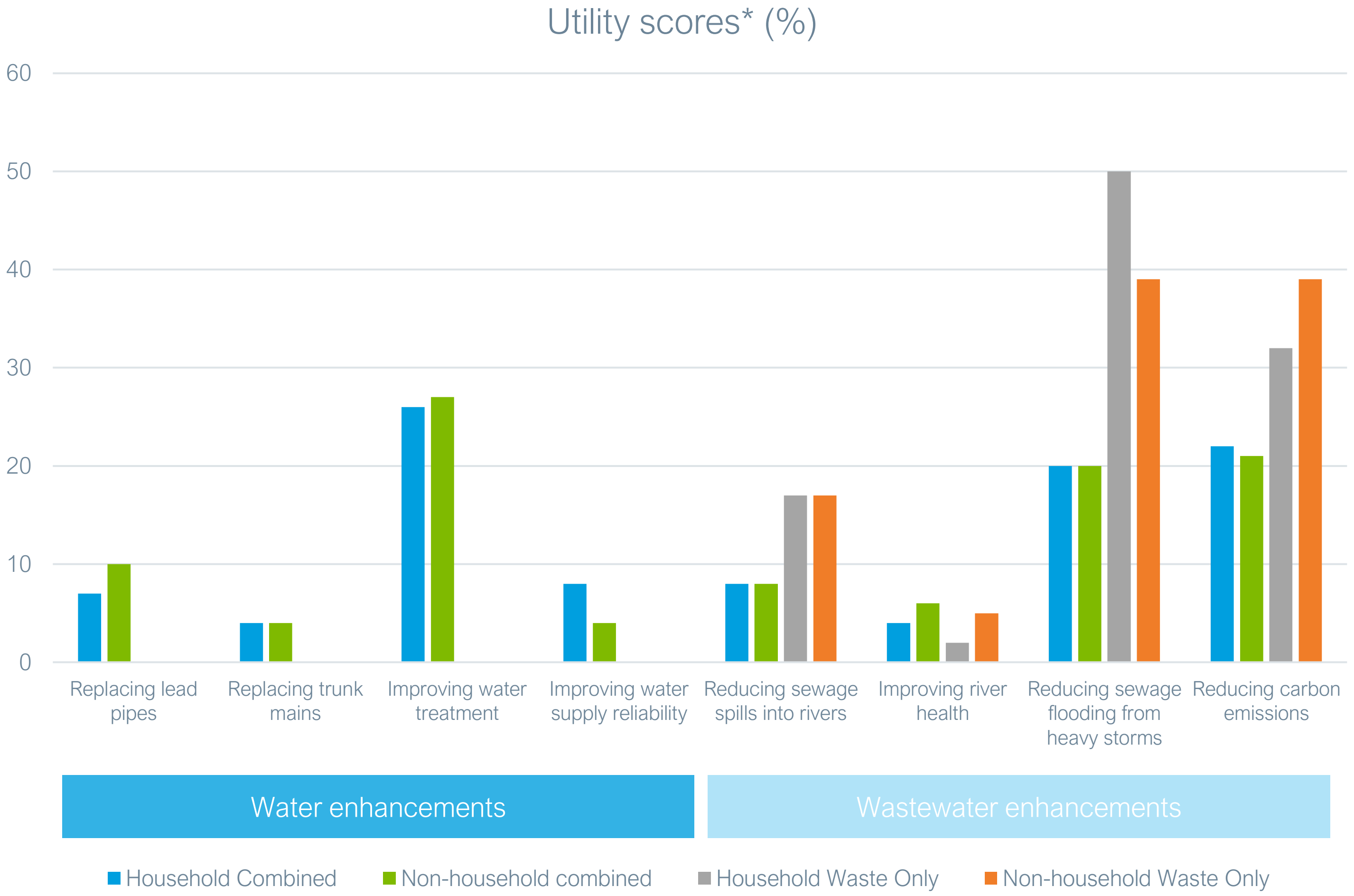
The scores shown in brackets are the mean rank out of 8 across all responses. The Phase 1 Deep Dives looked at a shortlist of eight potential enhancement areas. 232 responses across all five deep dive research communities. Findings should be taken as indicative as customers based their answers on limited information, apart from the topic(s) that they would have just been focusing on. *"Q. Please take a look at the main extra initiatives that Thames Water could undertake over 2025-2030, and rank them in order of priority you think Thames Water should give them, for instance where you think Thames Water need to make the most improvements. So, the most important initiative for Thames water to tackle should be no 1 and the least important initiative for them to tackle should be no 8."*
Source: PR24-13 Enhancement Case deep dive summary (PR24-04 to PR24-10), February 2022.

Testing customers' priority of enhancement areas

PR24 Options Research

Across the quantitative and qualitative research, there are differences in the preferred enhancements, however clear themes do emerge.

- *The safety of **water** is a key priority for customers:* 'Improving water treatment' enhancements are most likely to drive combined customers to select a package.
- *Sorting out the 'broken' **wastewater** system is also a key priority for customers:* 'Reducing sewage flooding from heavy storms' are most likely to drive waste only customers to choose an enhancement package for wastewater, and second most likely for combined customers.
- *'Reducing carbon emissions'* enhancements were an additional driver for non-household waste only customers to choose a package. Whilst reducing carbon emissions is seen to be important, some felt this should be a core part of Thames Water's operations rather than an enhancement.



*% scores show how important each enhancement area was in driving a customer to choose a package in the online survey trade-off exercise, **not** the % of customers who would choose each area.

Appendix C – Detailed PR24 Acceptability and Affordability testing findings

Detailed qualitative AAT findings (1/4)

We have provided a summary of the qualitative testing; quantitative findings will be available in September

Proposed plan - Acceptability	3 in 4 customers found the overall plan acceptable

• The main reasons for finding the plan **acceptable** were:
  • Environmentally friendly
  • Good future generations
  • Focuses on the right things
  • Affordable
  • Good value for money and significant action being taken
	• The main reasons for finding the plan **unacceptable** were:
	  • Costs should be covered by profits
	  • Not good value for money
	  • Unaffordable / too expensive
	  • Lack of trust (in Thames Water)
	  • Plan won't go far enough to improve things

Overall comment: begins to address some of the environmental concerns, includes targets going in the right direction, tackles leakage and future water security/infrastructure issues which are a key concern due to population growth and climate change. Some concerns that the information/targets were a bit vague (e.g. what specific difference is reducing pollution incidents from 18.5 to 15.7 going to make) but customers worked with what was provided

Proposed plan - Affordability	Just under half of customers found the proposed plan affordable, with 1 in 3 finding it difficult to afford

• The main reasons for finding the plan **acceptable** were:
  • Water bills are already lower (relative to other utilities), and the extra amount isn't significant
  • Investment will be crucial and there isn't really much choice
  • Transparency and justification for investment
  • Water is vital
  • Issues and challenges being addressed are important and real
	• The main reasons for finding the plan **unacceptable or neither/nor** were:
	  • Cost of living/inflation squeezing household finances, many customers already financially vulnerable
	  • Difficulties in predicting future income or outgoings
	  • Some customers have high water usage
	  • Disagree with customers paying for investment – should come from profits or cost efficiencies
	  • Some want more information to inform decision
	  • Some don't feel impacted by the issues addressed

Overall comment: more find this Proposed Bill fairly/very difficult to afford and want to know whether there will be bill caps or exclusions to protect those who need support

Source: PR24-14 Acceptability and Affordability Testing Qualitative Findings, August 2023

Detailed qualitative AAT findings (2/4)

We have provided a summary of the qualitative testing; quantitative findings will be available in September

Must Do Plan - Acceptability

Just over half found the Must Do Plan acceptable (70% of non-household customers found the plan acceptable)

- The main reasons for finding the plan **acceptable** were:
  - Focusses on the right things
  - Will make some improvements
  - Not too expensive
  - Environmentally friendly
  - Good for future generations

- The main reasons for finding the plan **unacceptable** were:
  - Not good enough for future generations
  - Plan won't improve things enough
  - Water companies should pay out of profits
  - Doesn't focus on the right things
  - Isn't environmentally friendly enough

Overall comment: Lower acceptability driven by perceived lack of proactivity with Thames Water focusing only what is mandatory which feels shortsighted for some – minimal cost reduction does not justify losing investment in three discretionary areas. Customers were also split on their views towards certain aspects of the plan e.g. benefit for future generations

Must Do - Affordability

Half found the Must Do Plan affordable, with 2 in 10 finding it difficult to afford

- The main reasons for finding the plan **acceptable** were:
  - Water bills are already lower (relative to other utilities), and the extra amount isn't significant
  - Investment will be crucial and there isn't really much choice
  - Transparency and justification for investment
  - Water is vital
  - Issues and challenges being addressed are important and real

- The main reasons for finding the plan **unacceptable or neither/nor** were:
  - Cost of living/inflation squeezing household finances, many customers already financially vulnerable
  - Difficulties in predicting future income or outgoings
  - Some customers have high water usage
  - Disagree with customers paying for investment – should come from profits or cost efficiencies
  - Some want more information to inform decision
  - Some don't feel impacted by the issues addressed

Overall comment: minimal difference in costs between Proposed and Must Do Plan. Proportion and distribution of affordability is not different for both plans.

Source: PR24-14 Acceptability and Affordability Testing Qualitative Findings, August 2023

Detailed qualitative AAT findings (3/4)

We have provided a summary of the qualitative testing; quantitative findings will be available in September

Alternative Plan - Acceptability

Almost 3 in 5 found the Alternative Plan acceptable

- The main reasons for finding the plan **acceptable** were:
  - Good value for money
  - Focusses on the right things
  - Environmentally friendly
  - Good for future generations
  - Plan will make good improvements

- The main reasons for finding the plan **unacceptable** were:
  - Not environmentally friendly enough
  - Plan won't make sufficient improvements
  - Poor value for money
  - Not good for future generations
  - Lack of trust/not focussing on the right things

Overall comment: Acceptability was slightly higher than the Must Do Plan, but significantly lower than the Proposed Plan. It was observed that customers who preferred this plan tended to be less environmentally focussed. The Alternative Plan focussed on a slower reduction in phosphorous under NEP – Waste enhancement; customers who accepted this plan were comfortable with the slower reduction and the slightly lower short-term cost.

Alternative Plan - Affordability

Around half found the Alternative Plan affordable, with just over a quarter finding it difficult to afford

- The main reasons for finding the plan **acceptable** were:
  - Water bills are already lower (relative to other utilities), and the extra amount isn't significant
  - Investment will be crucial and there isn't really much choice
  - Transparency and justification for investment
  - Water is vital
  - Issues and challenges being addressed are important and real

- The main reasons for finding the plan **unacceptable or neither/nor** were:
  - Cost of living/inflation squeezing household finances, many customers already financially vulnerable
  - Difficulties in predicting future income or outgoings
  - Some customers have high water usage
  - Disagree with customers paying for investment – should come from profits or cost efficiencies
  - Some want more information to inform decision
  - Some don't feel impacted by the issues addressed

Overall comment: Customers were focussed on the reduced short-term bill impact, despite the higher longer-term bill impact. The proportion and distribution of affordability is similar across Proposed, Must do and Alternative plans indicating that customers did not find the price differences vs. service enhancements different enough.

Source: PR24-14 Acceptability and Affordability Testing Qualitative Findings, August 2023

Detailed qualitative AAT findings (4/4)

We have provided a summary of the results from the qualitative testing of our draft PR24 business plan (May 2023); quantitative findings will be available in September ahead of final plan submission to Ofwat.

Considerations for CIVS*

Vulnerable customers and customers struggling to pay were shown specific proposals to be put in place for them. They were also asked about their awareness of support available to them, either through the PSR or through reduced bills

For **vulnerable customers**, this included:

- Alternative water and communications during supply interruptions
- Inclusive communications e.g. Braille, BSL, translation
- Taking their situation into account with tailored behaviours from Thames Water's people

For **customers struggling to pay their bills**, this included:

- Switching to metered tariff and water efficiency support
- Payment plans, matching payments and grants and Hardship Fund
- Income and expenditure reviews to establish sustainable payments
- Discount tariffs for customers with low incomes, medical dependency on water or those with a high ratio of water to bill to income
- Income maximisation advice and debt advice referrals

Response to proposals:

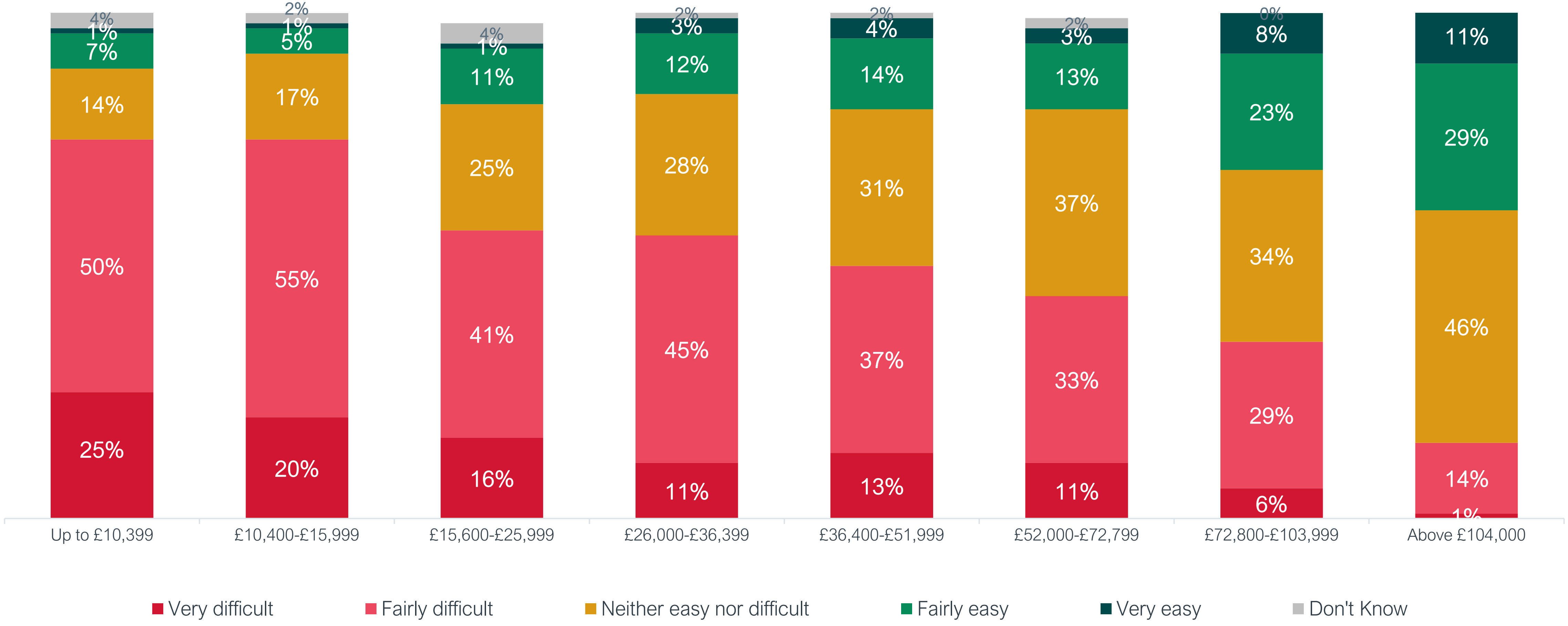
- Welcome all PSR and financial support services but strongly feel that Thames Water need to communicate these services in a more meaningful way to raise awareness
- Even those who are on the PSR, or who know about it, are unaware of what they are entitled to
- Key requirements are for Thames Water to treat customers as individual and respectful of customers' needs – BSL and braille recognised as an attempt to do this
- Looking for card or sticker with easy to access phone number, bottled water if supply is interrupted, readily available grants/bill support and wider water related support e.g. changing taps for customers with arthritis, etc

*Customers in vulnerable situations

Source: PR24-14 Acceptability and Affordability Testing Qualitative Findings, August 2023

Detailed quantitative AAT findings (1/5)

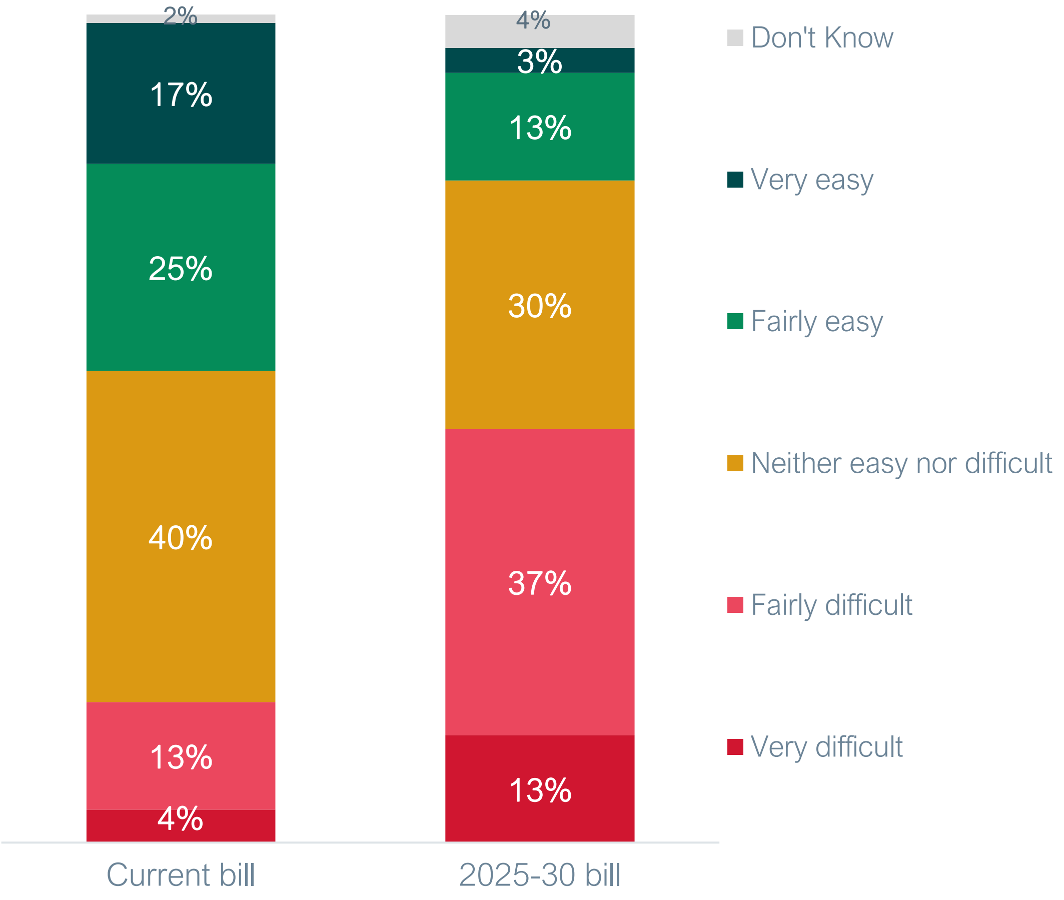
Affordability - household customers

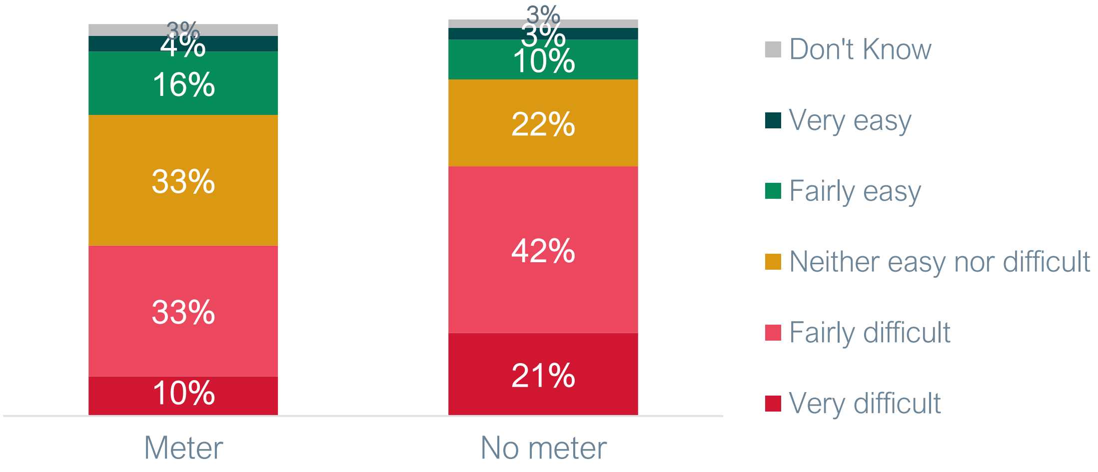


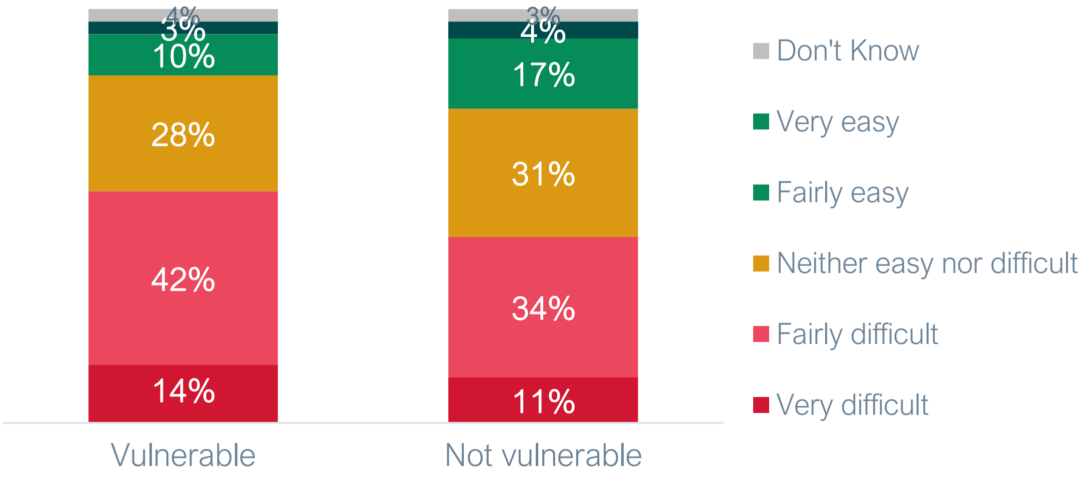
Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Detailed quantitative AAT findings (2/5)

Affordability - household customers



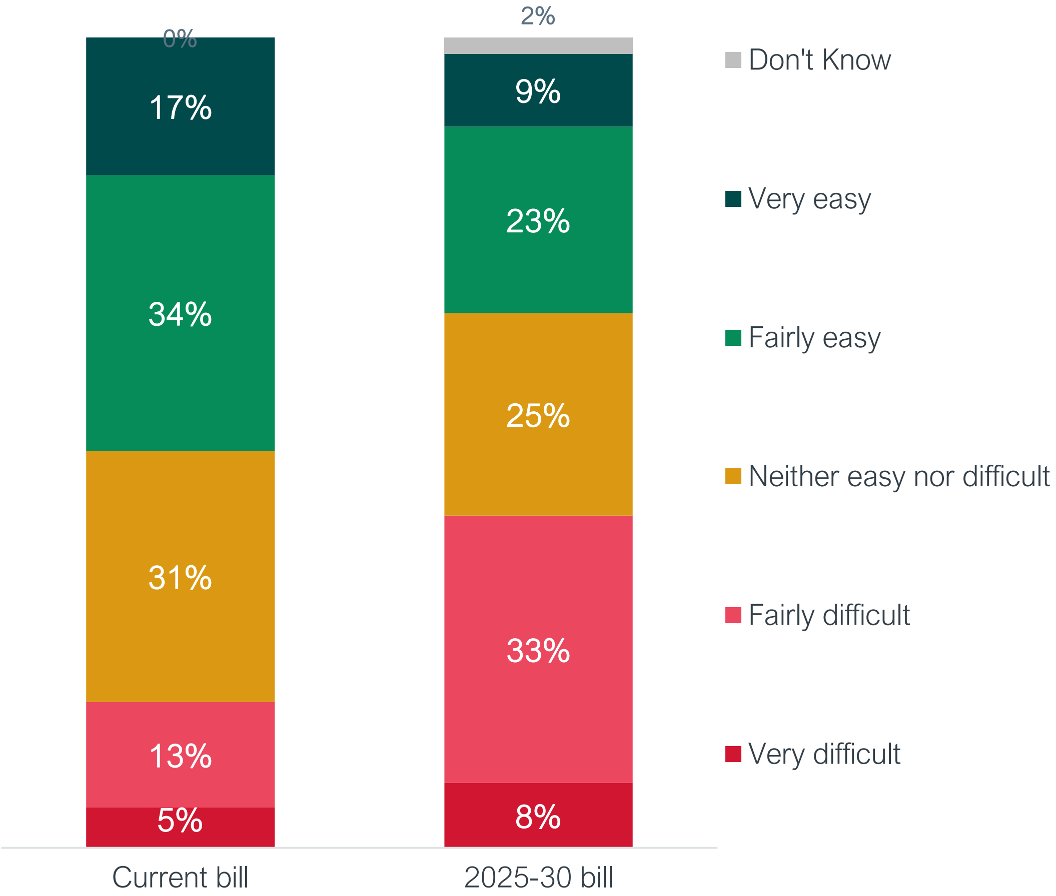


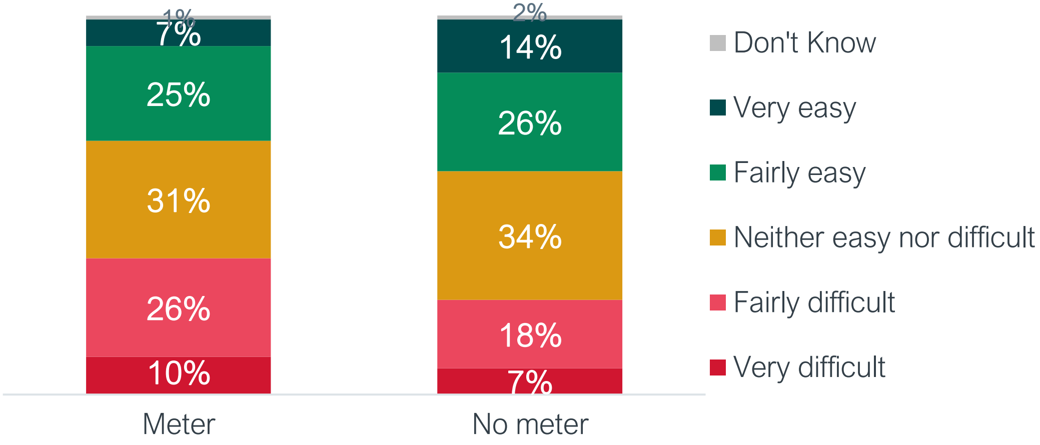


Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Detailed quantitative AAT findings (3/5)

Affordability - non-household customers

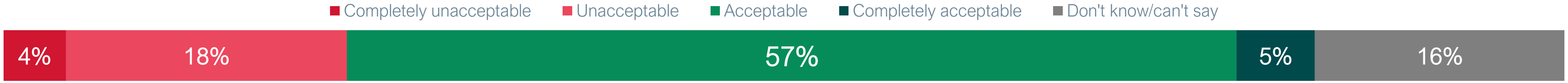




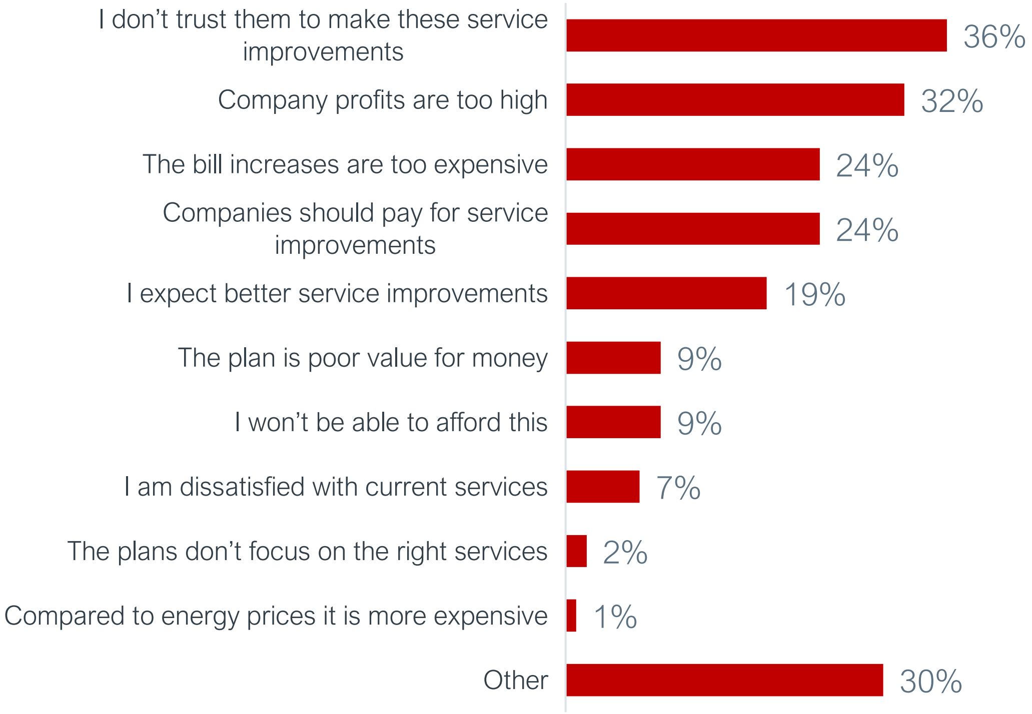
Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Detailed quantitative AAT findings (4/5)

Acceptability - household customers



Reasons for unacceptability

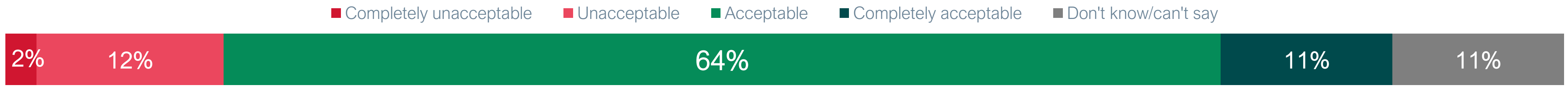


Reasons for acceptability

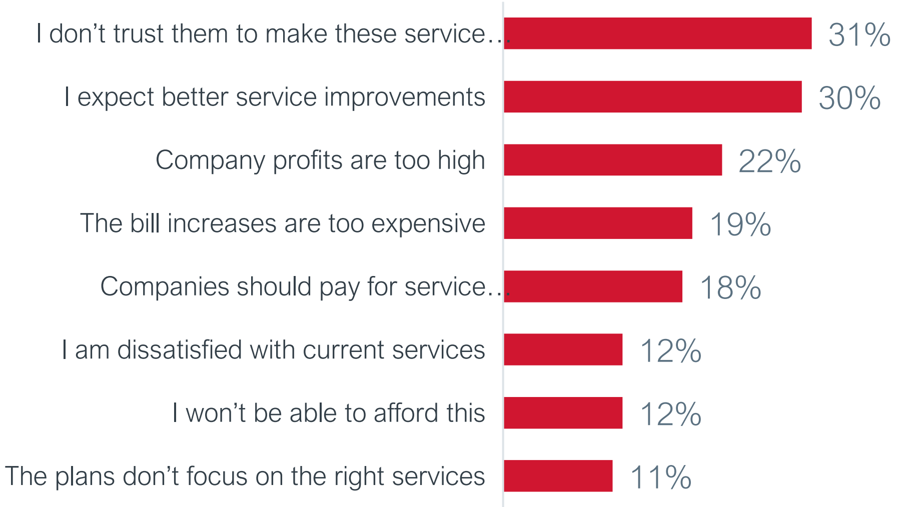
Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Detailed quantitative AAT findings (5/5)

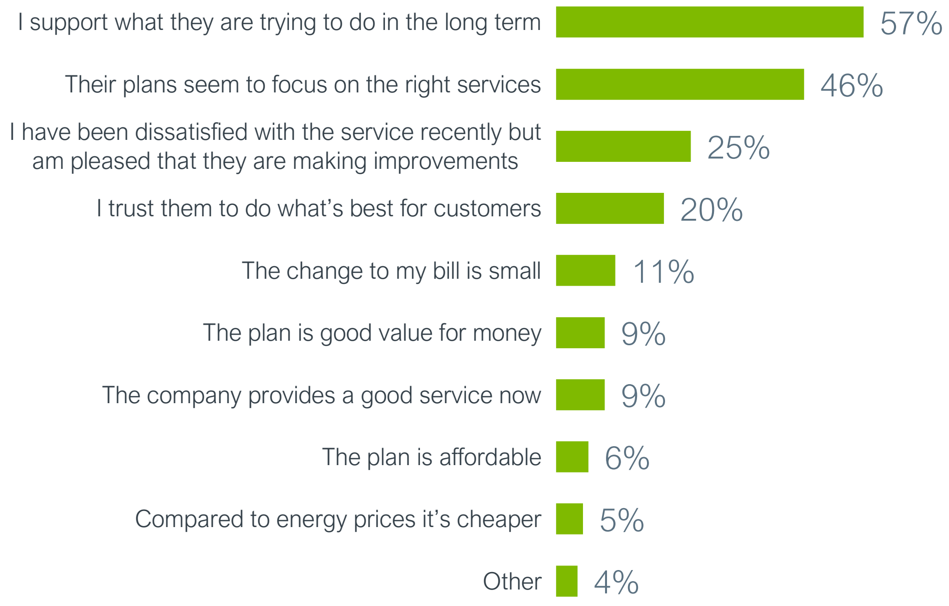
Acceptability - non-household customers



Reasons for unacceptability



Reasons for acceptability



Source: PR24-17 Acceptability and Affordability Testing Quantitative Findings, August 2023

Thank you