



# Customer Understanding of the Thames Tideway Tunnel

Consolidated Reporting: Household and Non-household

April 2019

## Household Waves:

Benchmark, AMP6 Year 1, AMP6 Year 2, AMP6 Year 3, AMP6 Year 4

## Non-Household Waves:

AMP6 Year 1, AMP6 Year 2, AMP6 Year 3, AMP 6 Year 4





# Summary of Household Customer Views



# Key Performance Measures

Household awareness and understanding of the TTT has remained stable since AMP6 Year 3

|  | Benchmark<br>(2014/15) | AMP6 Year 1<br>(2015/16) | AMP6 Year 2<br>(2016/17) | AMP6 Year 3<br>(2017/18) | AMP6 Year 4<br>(2018/19) |
|--|------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Household Awareness</b>                   | 42%                    | 43%                      | 36%                      | 40%                      | 41%                      |
| <b>Household Composite Understanding</b>     | 35%                    | 35%                      | 31%                      | 36%                      | 35%                      |
| <i>Non-Household Awareness</i>               | -                      | 36%                      | 36%                      | 37%                      | 37%                      |
| <i>Non-Household Composite Understanding</i> | -                      | 28%                      | 27%                      | 26%                      | 29%                      |

\*statements within composite understanding of the project

A) Millions of tonnes of untreated sewage enters the River Thames each year

D) The Thames Tideway Tunnel will prevent almost all untreated sewage entering the tidal River Thames

E) The Thames Tideway Tunnel will be paid for through the sewerage bills of all customers receiving a sewerage service from Thames Water

F) The Thames Tideway Tunnel will run for 15 miles from west to east London, mainly following the route of the Thames

No significant differences to AMP6 Year 3 (2017/18) at 95%



# Summary of key findings – AMP6 Year 4

1

Overall household awareness of the TTT has remained in line with last year

While there has been a significant increase in people seeing and hearing about the TTT via radio or TV programmes, less have seen about the TTT in online articles

2

Similarly, composite understanding has also remained in line with last year

This is despite the fact there has been a decline in customers recognising that the TTT will be paid for via the sewerage bills of all sewerage customers

3

Unprompted support is at its highest level (36%), although the majority are still ambivalent (62%)

Support is consistent versus last year across all demographic groupings, however, opposition has increased among social grade AB. Reasons for why people support the TTT are also in line versus last year, with the exception of a reduction in pollution / being good for the environment, which has significantly increased

4

Once further information about the TTT is provided, support for the project almost doubles

Knowing more about the project and the TTT reducing pollution in the River Thames are the key drivers for switching to support

5

The proportion finding the bill increase acceptable has remained in line, at its joint highest level

Levels of acceptability are relatively consistent across demographic groupings, except for customers in social grade C2, where acceptability has decreased significantly

6

The bill increase is seen as affordable by around 6 in 10, consistent with last year

Perceptions of affordability have remained stable across most key demographic groups. Young females are now significantly more likely to find the bill increase affordable.





# Full Report



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# Background and Approach





# Background to the Research

## Background

Thames Water have set up a long-term research programme to monitor customer opinion about the Thames Tideway Tunnel (TTT).

Key measures tracked include:





- Awareness and knowledge of the TTT
- Overall opinion and level of support for the TTT
- Acceptability and affordability of the bill impact

## Research Approach

The methodology has remained consistent across all 3 waves with a representative sample of Thames Water customers sampled, based on c2000 interviews conducted online and an additional c200 telephone interviews amongst those who aren't online.

- The initial benchmark wave was conducted from 30<sup>th</sup> Jan – 11<sup>th</sup> Feb 2015
- The second wave (AMP6 Year 1) was conducted between 18<sup>th</sup> Jan – 1<sup>st</sup> Feb 2016
- The third wave (AMP6 Year 2) was conducted from 16<sup>th</sup> Jan – 6<sup>th</sup> Feb 2017
- The fourth wave (AMP6 Year 3) was conducted from 16<sup>th</sup> – 29<sup>th</sup> January 2018
- The most recent wave (AMP6 Year 4) was conducted from 28<sup>th</sup> Jan – 13<sup>th</sup> Feb 2019

## Sample Size






|  | Benchmark<br>(2014/15) | AMP6<br>Year 1<br>(2015/16) | AMP6<br>Year 2<br>(2016/17) | AMP6<br>Year 3<br>(2017/18) | AMP6<br>Year 4<br>(2018/19) |
|--|------------------------|-----------------------------|-----------------------------|-----------------------------|-----------------------------|
| All Customers  | 2,269                  | 2,242                       | 2,223                       | 2,223                       | 2,248                       |
| Clean & Waste (64%)  | 1,473                  | 1,453                       | 1,356                       | 1,461                       | 1,464                       |
| Waste Water Only (36%)   | 796                    | 789                         | 867                         | 762                         | 784                         |
|  Affinity Water                            | 447*                   | 412*                        | 487*                        | 416*                        | 407*                        |
|  ESSEX & SUFFOLK WATER <i>living water</i> | 109*                   | 111*                        | 117*                        | 103*                        | 125*                        |
|  south east water                          | 129*                   | 142*                        | 146*                        | 130*                        | 127*                        |
|  Sutton and East Surrey Water             | 111*                   | 124*                        | 117*                        | 113*                        | 125*                        |

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**\*Caution:** Base sizes for other WOCs range from n=125-407 and are not designed to be representative of the customer base

# Profile of water company customers (AMP6 Year 4)

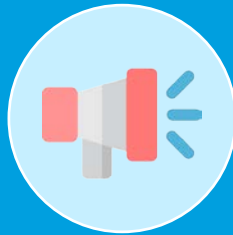
|                       |                                | Total       |  |  |  |  |  |
|-----------------------|--------------------------------|-------------|---|---|---|---|---|
| <b>Sample size</b>    | <b>Unweighted base</b>         | <b>2248</b> | <b>1464</b>   | <b>407</b>  | <b>125</b>  | <b>127</b>  | <b>125</b>  |
| <b>Gender</b>         | Men                            | 49%         | 52%   | 46%   | 48%   | 39%   | 40%   |
|                       | Women                          | 51%         | 48%   | 54%   | 52%   | 61%   | 60%   |
| <b>Age</b>            | Average age                    | 45.1        | 43.9  | 46.3  | 47.7  | 49.9  | 46.3  |
| <b>Social grade</b>   | AB                             | 29%         | 30%   | 28%   | 24%   | 26%   | 34%   |
|                       | C1                             | 33%         | 33%   | 30%   | 35%   | 34%   | 33%   |
|                       | C2                             | 17%         | 16%   | 17%   | 19%   | 18%   | 16%   |
|                       | DE                             | 21%         | 20%   | 24%   | 19%   | 21%   | 17%   |
| <b>Postcode area</b>  | Inside London                  | 59%         | 69%   | 38%   | 89%   | 4%  | 62%   |
|                       | Outside London                 | 41%         | 31%   | 61%   | 10%   | 96%   | 38%   |
| <b>Property type</b>  | Detached/semi-detached house   | 41%         | 36%   | 46%   | 52%   | 59%   | 48%   |
|                       | Terraced house                 | 24%         | 23%   | 28%   | 24%   | 21%   | 18%   |
|                       | Flat                           | 34%         | 40%   | 24%   | 21%   | 20%   | 33%   |
| <b>Housing tenure</b> | Own                            | 57%         | 54%   | 62%   | 67%   | 67%   | 65%   |
|                       | Rent                           | 41%         | 45%   | 37%   | 33%   | 32%   | 34%   |
| <b>Water meter</b>    | Yes - have a water meter       | 42%         | 41%   | 40%   | 40%   | 67%   | 45%   |
|                       | No - do not have a water meter | 52%         | 53%   | 54%   | 51%   | 28%   | 52%   |

Q2. Gender, Q3. Age, Q4. Social grade, Q5. Main water provider, Q6. Postcode, Q26. Property type, Q27. Housing tenure, Q20. Water meter. Caution: Base size for other WOCs range from n=125-407 and are not designed to be representative of the customer base



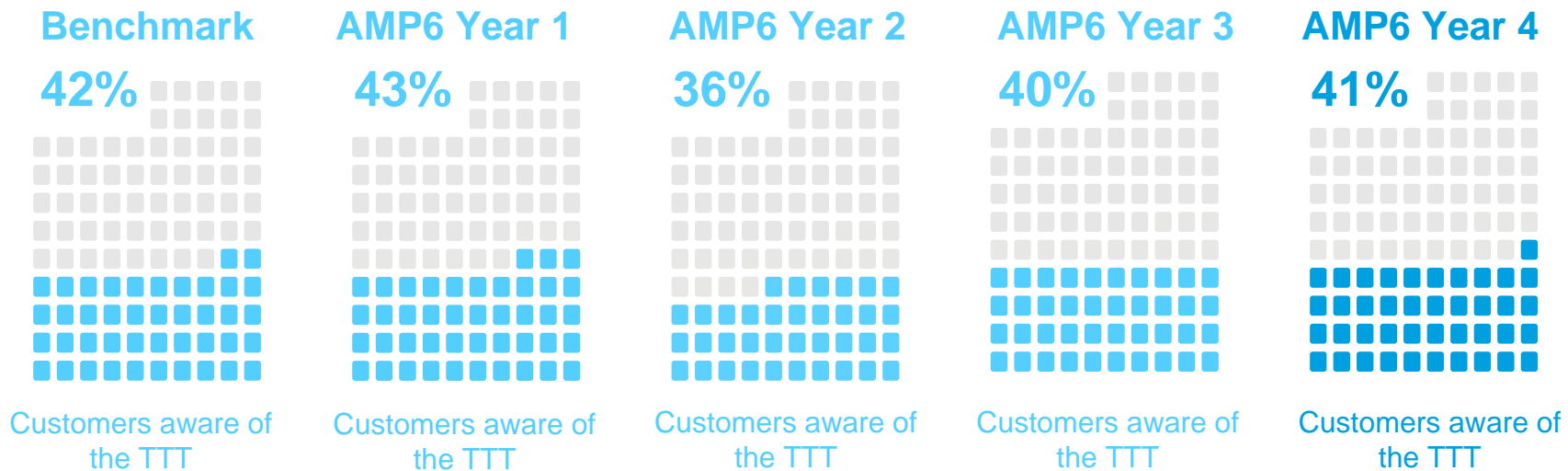


# Awareness and Familiarity



# Awareness of the TTT

Four in ten are aware of the TTT - in line with both last year and the benchmark figure



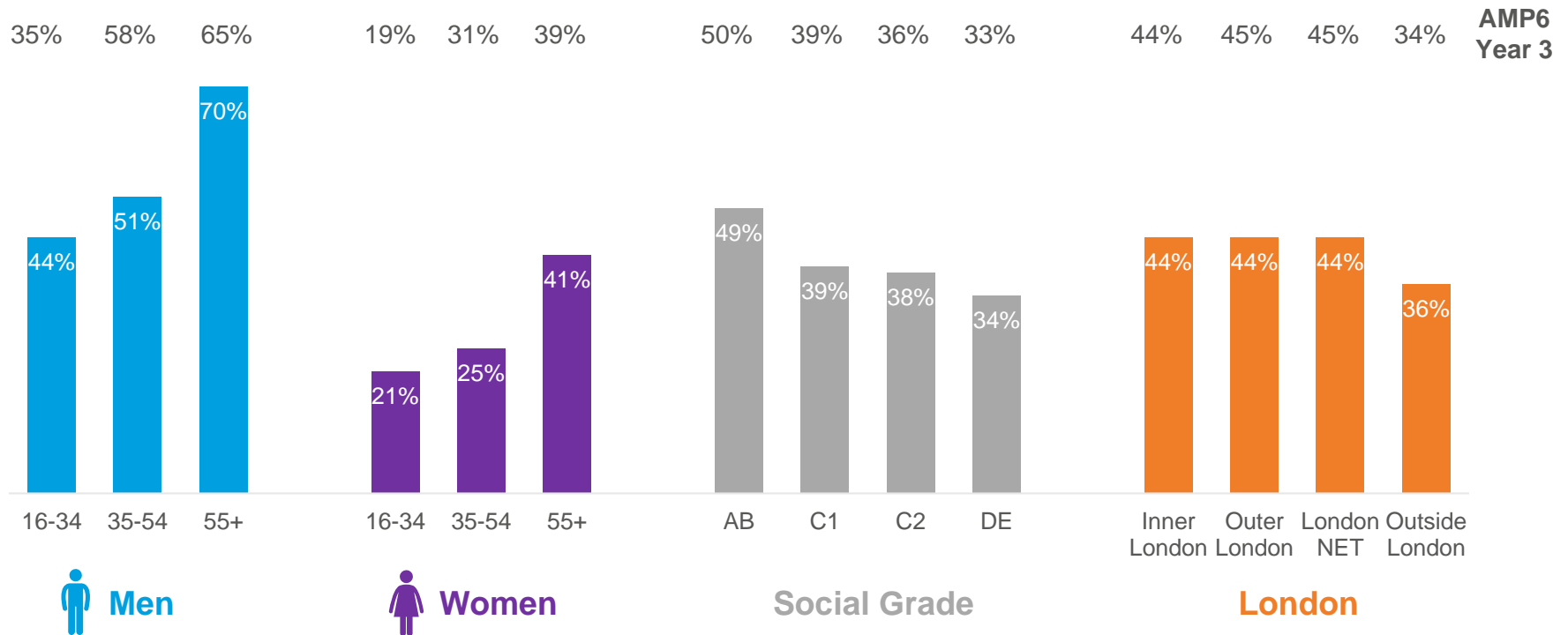
No significant differences to AMP6 Year 3 (2017/18) at 95%

Q8. The Thames Tideway Tunnel or 'super sewer' is a major new sewer in London. Before today had you heard of the Thames Tideway Tunnel or 'super sewer'? Base AMP6 Year 4: All Thames Water Customers n=2248



# Awareness of the TTT by key demographics

There have been no significant changes in awareness across all of the key demographic groupings or regions



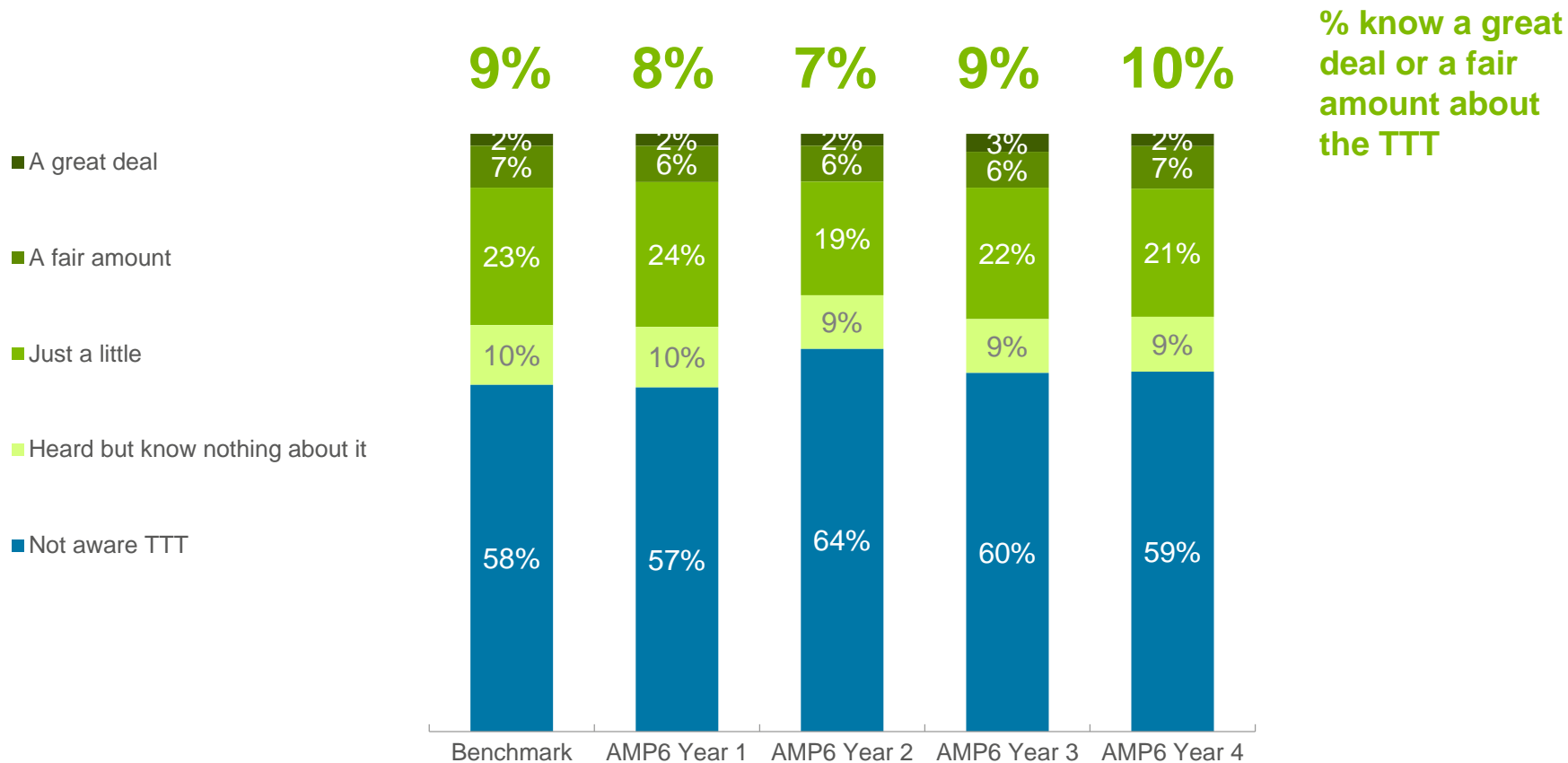
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Q8. The Thames Tideway Tunnel or 'super sewer' is a major new sewer in London. Before today had you heard of the Thames Tideway Tunnel or 'super sewer'? Base AMP6 Year 4: All Thames Water Customers n=2248



# Knowledge of the TTT

Familiarity with the TTT is at its highest ever level, with one in ten knowing a great deal or fair amount about it



No significant differences to AMP6 Year 3 (2017/18) at 95%

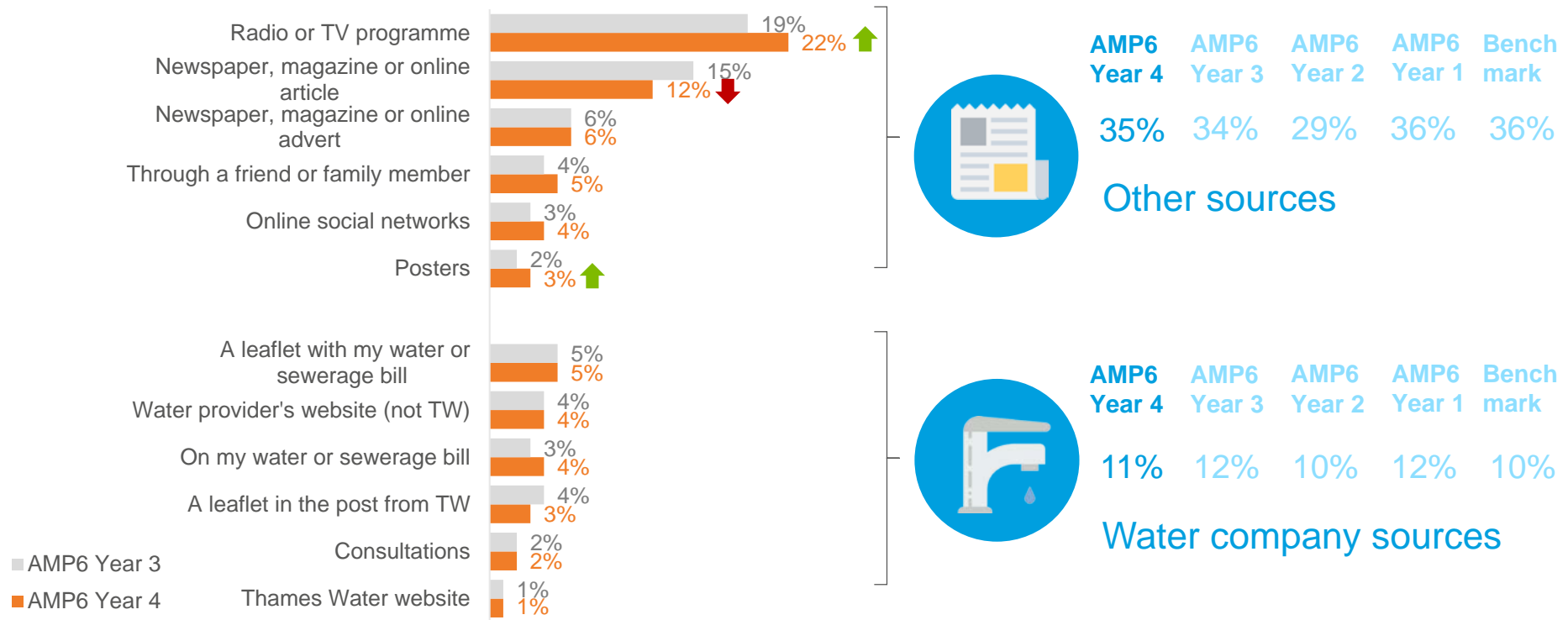
Q.10 How much, if anything, would you say you know about the Thames Tideway Tunnel?

Base AMP6 Year 4: All Thames Water Customers n=2248



# Where read, seen or heard about TTT

Significantly more people are seeing and hearing about the TTT on TV and radio compared to last year. However, less are seeing about it via articles, which means overall awareness remains stable



**Not aware: 59%**

↑ ↓ Significantly different to AMP6 Year 3 at 95%

Q9. In which of the following ways, if any, have you read, seen or heard about the Thames Tideway Tunnel?  
Base AMP6 Year 4: All Thames Water Customers n=2223





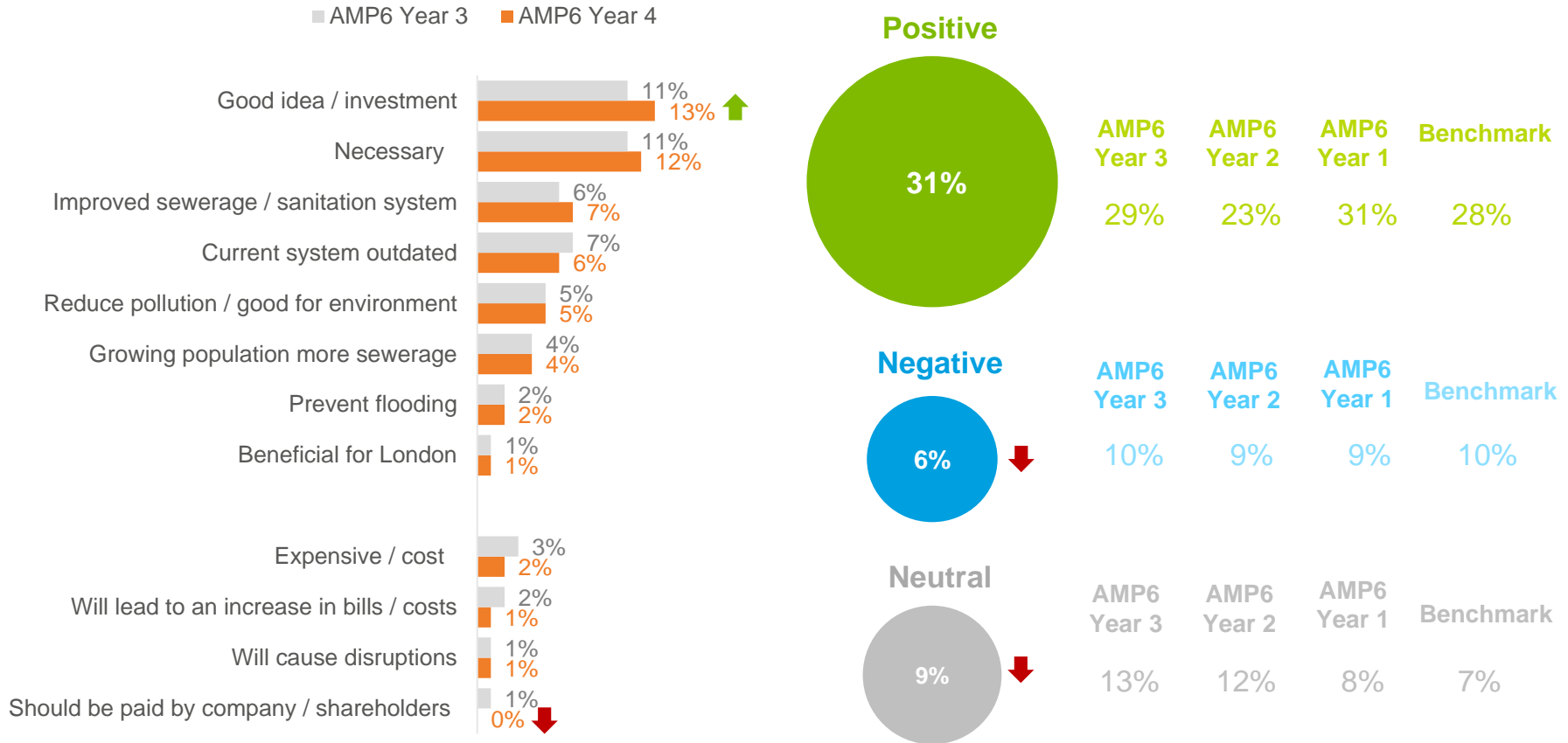
# Support and Opposition





# Overall opinion of TTT

Positive sentiment towards the TTT is at its joint highest level, with significantly more people thinking that the TTT is a good idea / investment, while negativity has declined to its lowest level



↑↓ Significantly different to AMP6 Year 3 at 95%

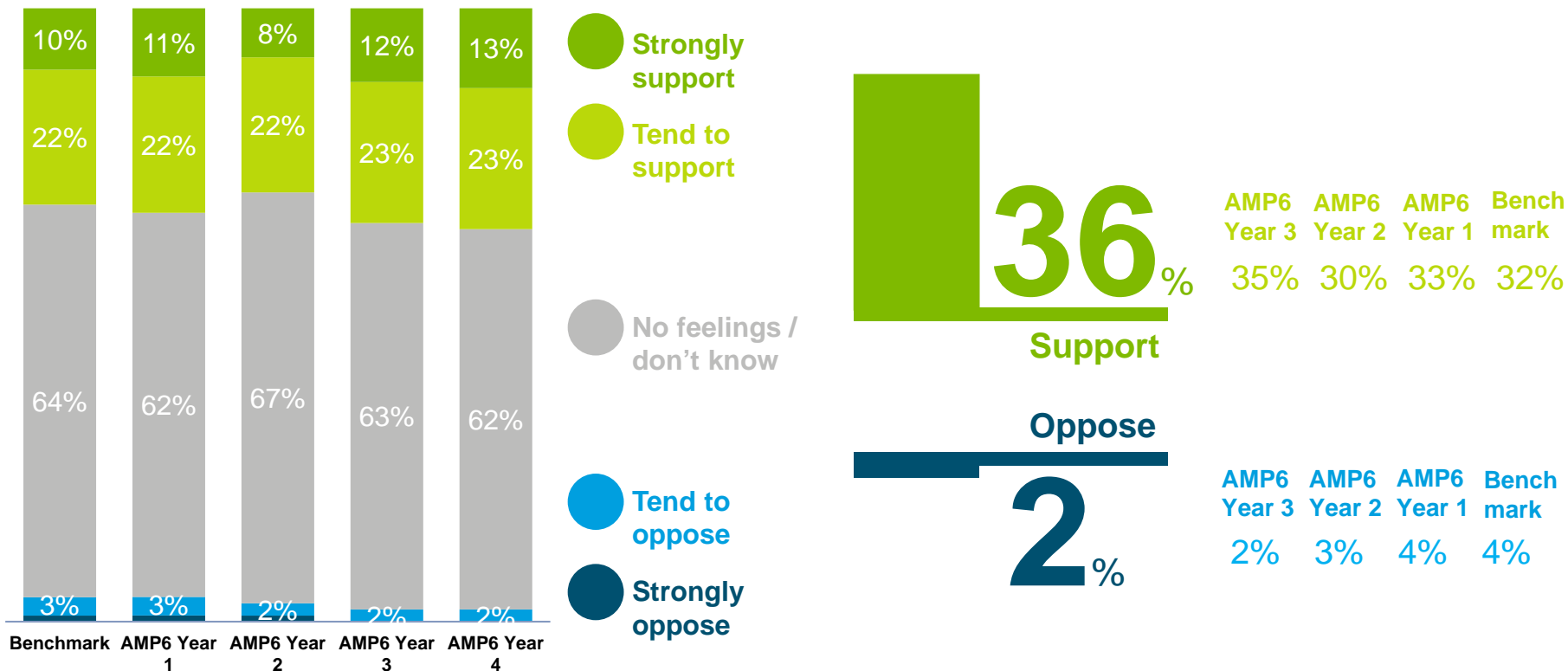
Q.11 What is your opinion of the Thames Tideway Tunnel?  
Base AMP6 Year 4: All Thames Water Customers n=2248



**Not aware: 59%**

# Unprompted support of the TTT

Support for the TTT is at its highest level recorded, while the proportion opposing remains extremely low



No significant differences to AMP6 Year 3 (2017/18) at 95%

Q.12 To what extent do you support or oppose the Thames Tideway Tunnel, or do you have no feeling either way?

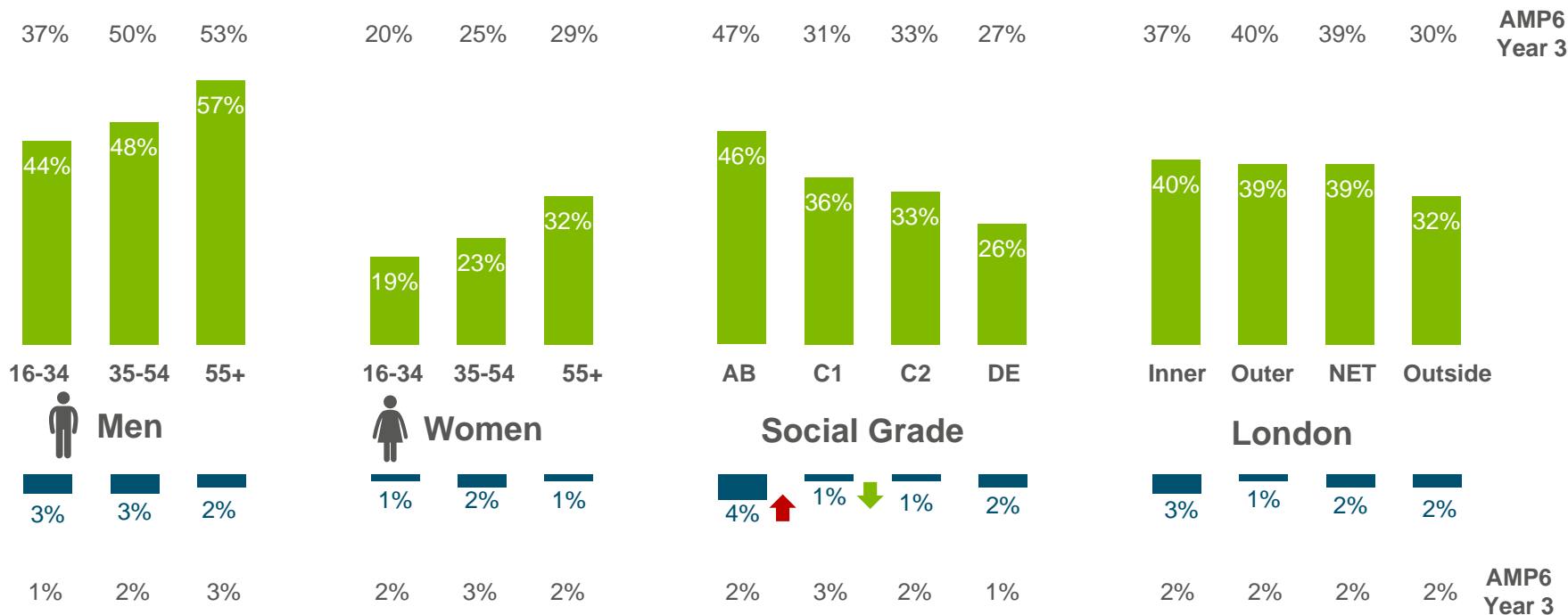
Base AMP6 Year 4: All Thames Water Customers n=2248



# Unprompted support of the TTT

There has been an increase in opposition among social grade AB, albeit it is still low at 4%, while opposition has declined among social grade C1

## Support



## Oppose

↑↓ Significantly different to AMP6 Year 3 at 95%

Q.12 To what extent do you support or oppose the Thames Tideway Tunnel, or do you have no feeling either way?  
Base AMP6 Year 4: All Thames Water Customers n=2248



# Reasons for supporting the TTT

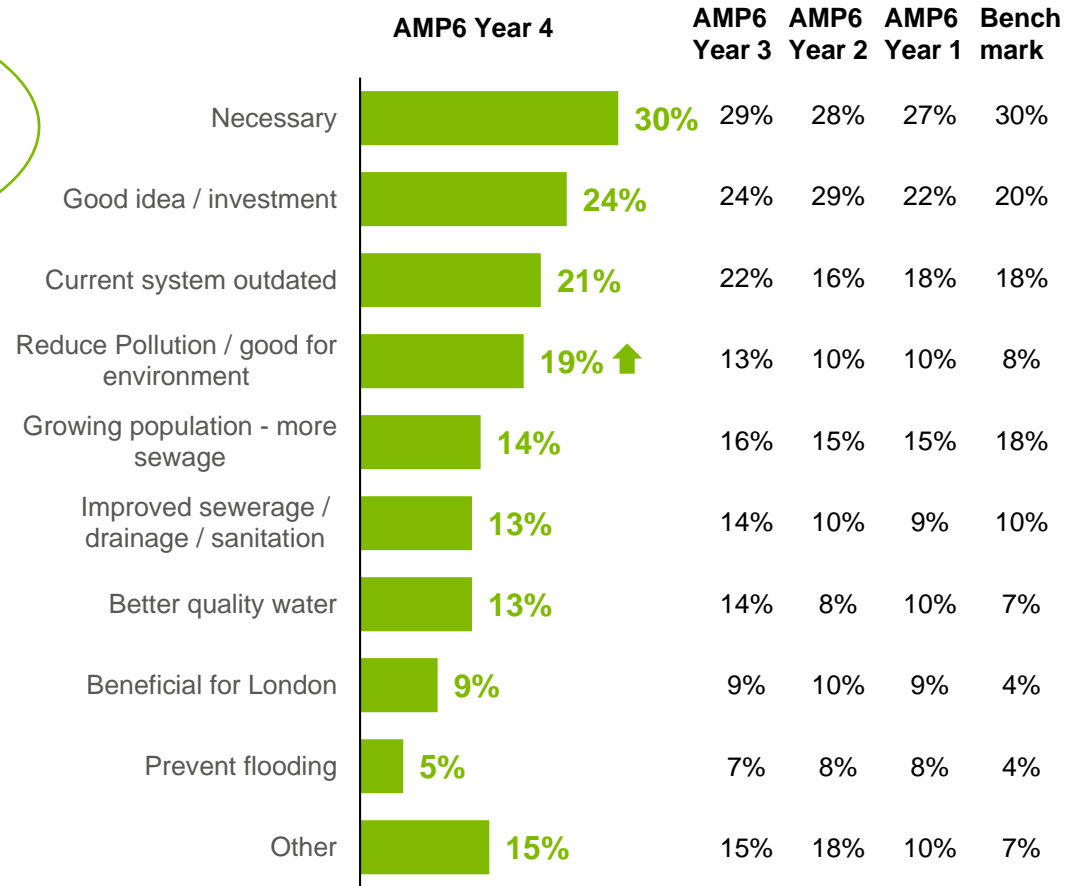
Perceptions of the benefits of the TTT have largely remained in line since last year, although significantly more people now cite that it will help reduce pollution / is good for the environment

*“This tunnel is needed because currently when our sewage systems are in overflow in heavy rains, the sewage is leaking into the River Thames. As a crucial part of London tourism, we should preserve this river.”*

*“Anything that can be done to clean up the environment and reduce pollution is a good thing.”*

36%

*“The existing Victorian sewer system is inadequate for increased volume of effluent produced by growing city.”*



Q13. Why do you say you support the Thames Tideway Tunnel?  
Base: All who support the TTT n=855



↑↓ Significantly different to AMP6 Year 3 at 95%

# Reasons for opposing the TTT

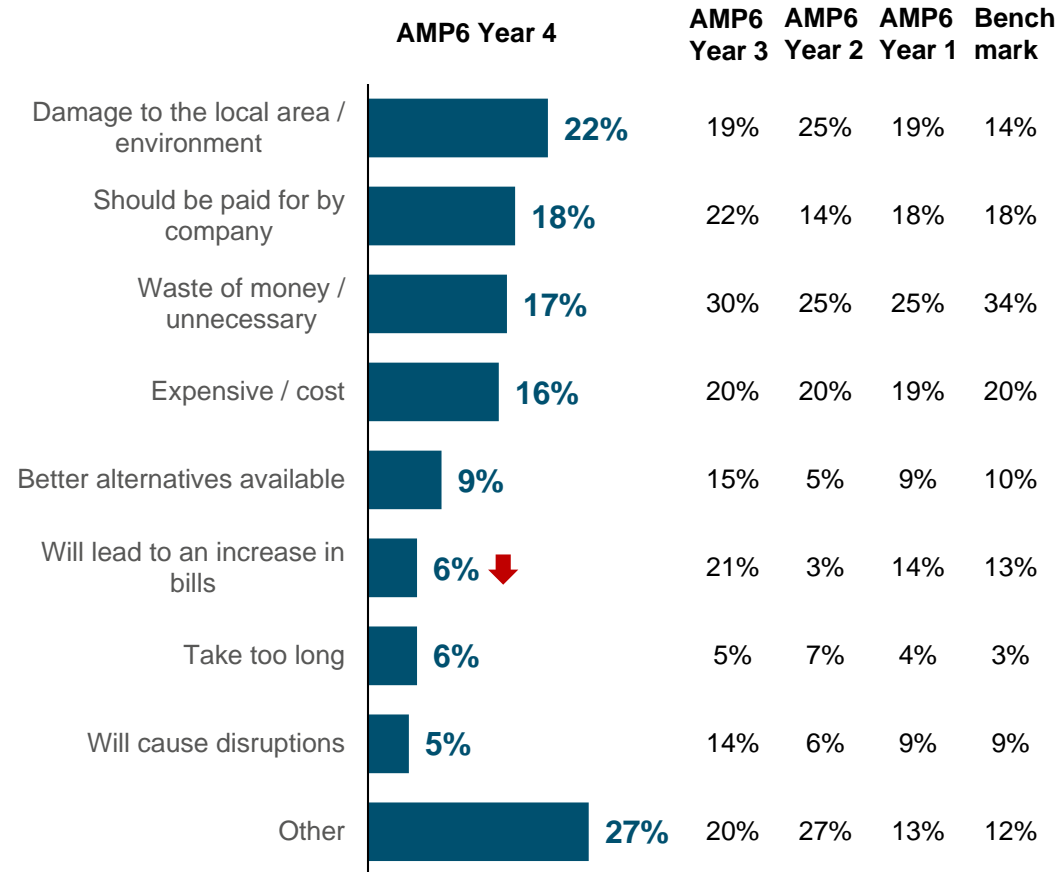
This year, less customers oppose the TTT as it will increase bills. However, damage to local areas, a perception that it should be paid for by the company and it being a waste of money remain the key reasons for opposition

*“Because we were not asked our opinion (for or against) by Thames Water, they are not only bullying us customers, they’re doing the same to our environment.”*

**2%**

*“The costs should be paid by Thames Water and not the paying customers.”*

*“I don’t see how the benefit justifies the cost.”*



Q13. Why do you say you oppose the Thames Tideway Tunnel?  
Base: All who oppose the TTT n=46



↑ ↓ Significantly different to AMP6 Year 3 at 95%



# Understanding



# Levels of awareness and understanding

Awareness of Thames issues are in line vs. last year, although less people are aware that it will be paid for through the sewerage bills of sewerage customers

| All respondents      |   | AMP6 Year 4 | AMP6 Year 3 | AMP6 Year 2 | AMP6 Year 1 | Bench mark |
|----------------------|---|-------------|-------------|-------------|-------------|------------|
| <b>Thames issues</b> | London's Victorian sewers now lack the capacity to deal with the sewage of today's population   | 74%         | 76%         | 72%         | 74%         | 74%        |
|                      | Millions of tonnes of untreated sewage enters the River Thames each year  | 62%         | 63%         | 57%         | 58%         | 55%        |
| <b>TTT specifics</b> | The Thames Tideway Tunnel will prevent almost all untreated sewage entering the tidal River Thames                                    | 30%         | 29%         | 24%         | 28%         | 31%        |
|                      | The Thames Tideway Tunnel will run for 15 miles from west to east London, mainly following the route of the Thames                    | 26%         | 25%         | 21%         | 25%         | 26%        |
|                      | The Thames Tideway Tunnel will be paid for through the sewerage bills of all customers receiving a sewerage service from Thames Water | 23% ↓       | 27%         | 21%         | 29%         | 28%        |
|                      | Construction of the Thames Tideway Tunnel will begin in 2016 and last until 2024  | 20%         | 19%         | 16%         | 17%         | 16%        |
|                      | The Thames Tideway Tunnel will last at least 100 years  | 17%         | 19%         | 15%         | 18%         | 15%        |

↑ ↓ Significantly different to AMP6 Year 3 at 95%

Q14 Which, if any, of the following were you aware of before today?  
Base AMP6 Year 4: All Thames Water Customers n=2248



# Key Performance Measures

Household awareness and understanding of the TTT has remained stable since AMP6 Year 3

|  | Benchmark<br>(2014/15) | AMP6 Year 1<br>(2015/16) | AMP6 Year 2<br>(2016/17) | AMP6 Year 3<br>(2017/18) | AMP6 Year 4<br>(2018/19) |
|--|------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Household Awareness</b>                   | 42%                    | 43%                      | 36%                      | 40%                      | 41%                      |
| <b>Household Composite Understanding</b>     | 35%                    | 35%                      | 31%                      | 36%                      | 35%                      |
| <i>Non-Household Awareness</i>               | -                      | 36%                      | 36%                      | 37%                      | 37%                      |
| <i>Non-Household Composite Understanding</i> | -                      | 28%                      | 27%                      | 26%                      | 29%                      |

\*statements within composite understanding of the project

A) Millions of tonnes of untreated sewage enters the River Thames each year

D) The Thames Tideway Tunnel will prevent almost all untreated sewage entering the tidal River Thames

E) The Thames Tideway Tunnel will be paid for through the sewerage bills of all customers receiving a sewerage service from Thames Water

F) The Thames Tideway Tunnel will run for 15 miles from west to east London, mainly following the route of the Thames

No significant differences to AMP6 Year 3 (2017/18) at 95%







# Billing



# Information provided on the TTT

## Information read out to customers as part of the telephone survey

### Information on TTT

#### Thames Tideway Tunnel

The Thames Tideway Tunnel (the 'super sewer') is a major new sewer in London that is being built from 2016 to 2024. It will prevent almost all untreated sewage entering the tidal River Thames.

Until the tunnel is built millions of tonnes of untreated sewage will continue to enter the River Thames in a typical year.

- This mostly happens during periods of heavy rain when sewers become overloaded with sewage and rainwater.
- The tunnel will help capture untreated sewage before it enters the River Thames.
- It will run for around 15 miles from west to east London, mostly following the route of the River Thames.

The tunnel will last for at least 100 years. It will improve the river environment both for wildlife (including fish) and people.

Parliament has decided that the tunnel is necessary and should be paid for through the wastewater bills of all customers receiving a wastewater service from Thames Water.

### Information on TTT payment

As with all the company's investments, the Thames Tideway Tunnel will be paid for through the wastewater bills of all customers receiving a wastewater service from Thames Water. This includes your household.

In **2019-20** the average wastewater household bill across all customers will be **£188** per year.

**£19** of the average bill for **2019-20** is associated with this project. That amount will need to increase gradually each year and is forecast to rise to no more than £25, plus an adjustment for inflation. ~~However, the costs of other aspects of Thames Water's work are expected to come down, which means the tunnel can be built while keeping customers' wastewater bills around their current price, before inflation, until at least 2020.~~

#### MORE INFORMATION ON INFLATION:

The forecast bill amounts do not include the effect of inflation. Inflation is the general rise in prices over time. In addition to any other changes, bills will also rise each year in line with inflation.

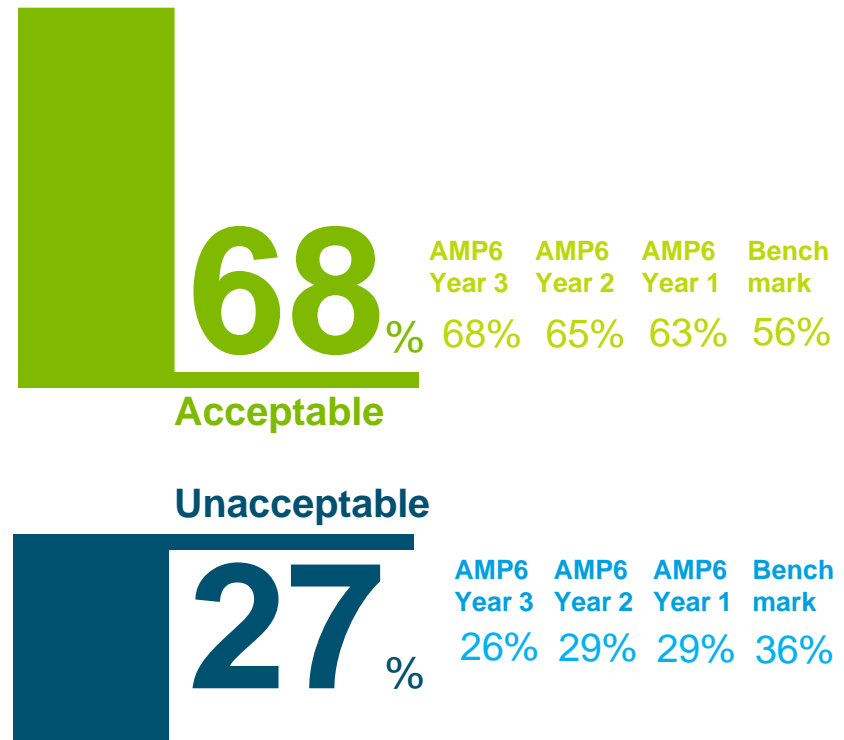
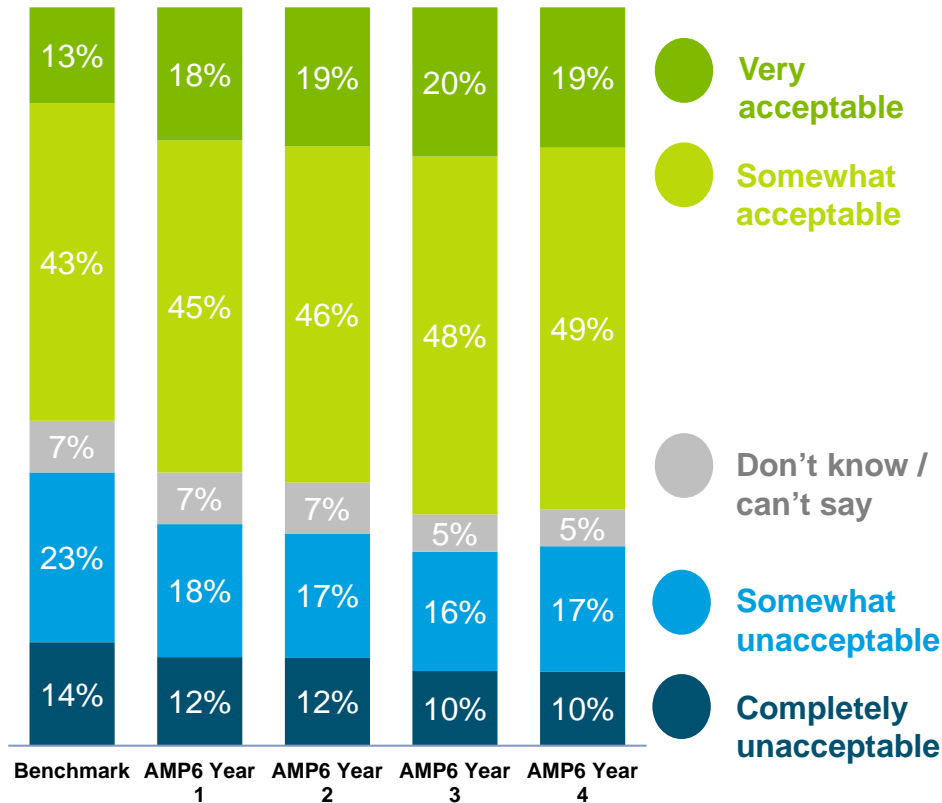
Please note, however, that inflation will also affect your household income (e.g. wages, benefits, state pensions, etc.) and all other items of household expenditure (e.g. shopping bills, other utility bills, fuel and travel costs, etc.).



*Amended wording between AMP6 Year 3 and AMP6 Year 4*

# Billing acceptability

Two thirds of customers continue to find the bill increase to pay for the TTT acceptable



No significant differences to AMP6 Year 3 (2017/18) at 95%

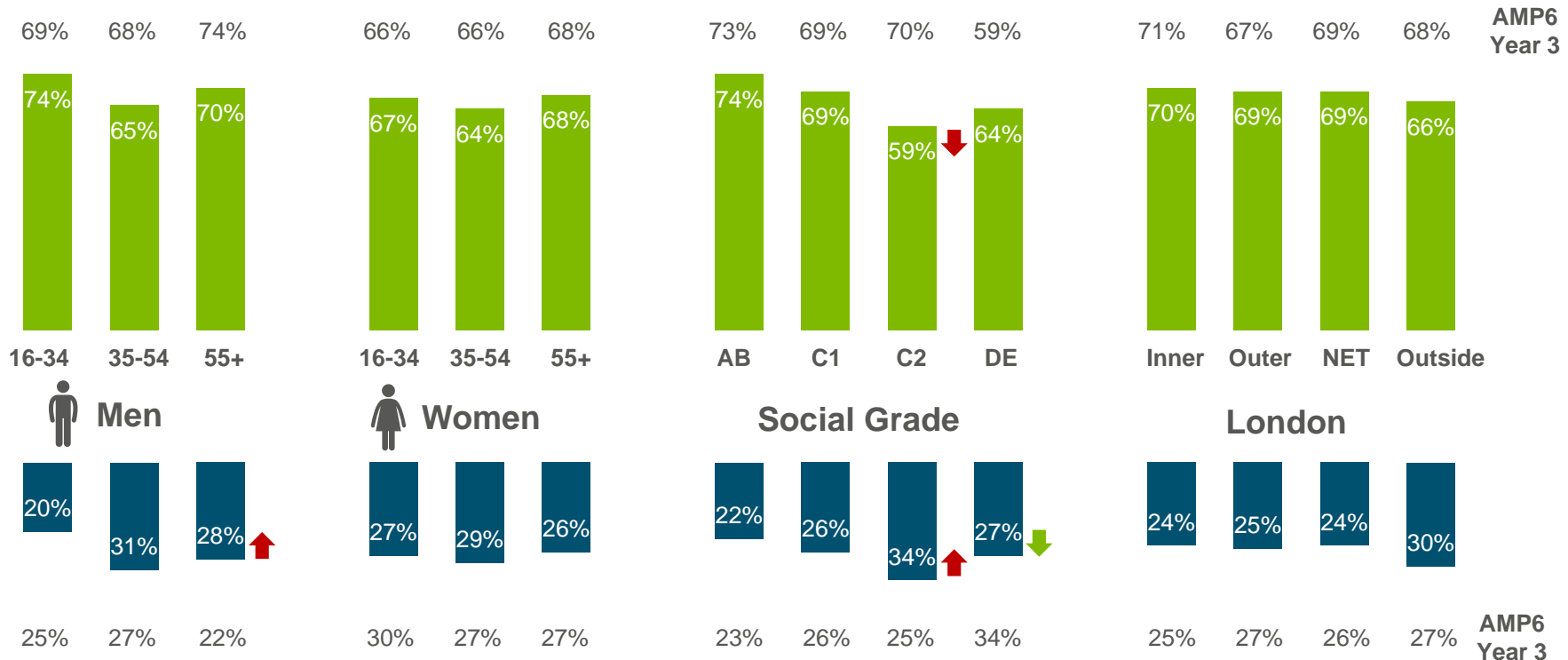
Q15. How acceptable or unacceptable do you consider this bill increase associated with the Thames Tideway Tunnel to be?  
Base AMP6 Year 4: All Thames Water Customers n=2248



# Billing acceptability by key demographics

Those in social grade C2 are less likely to find the bill increase acceptable, while men aged 55+ are also more likely to find it unacceptable compared to last year

## Acceptable



## Unacceptable

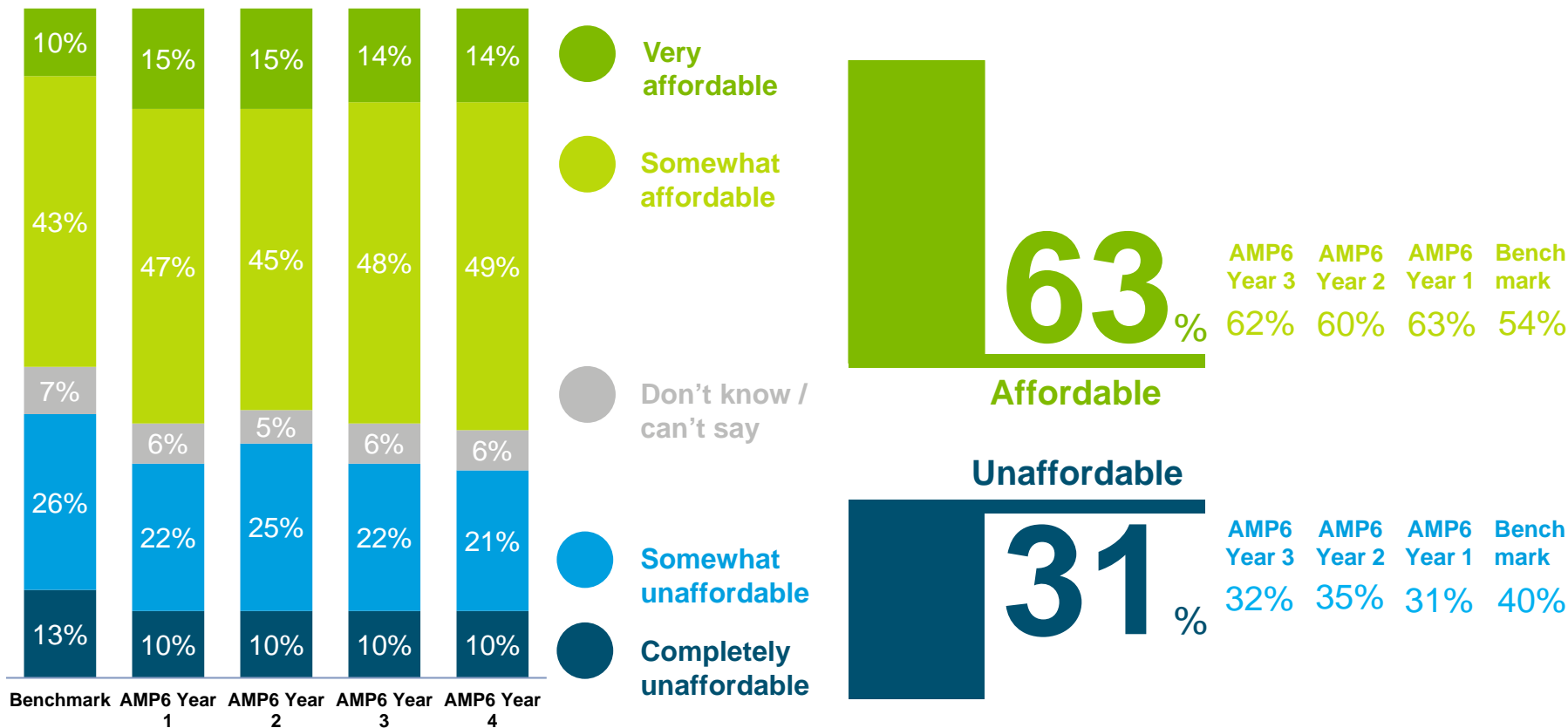
↑ ↓ Significantly different to AMP6 Year 3 at 95%

Q15. How acceptable or unacceptable do you consider this bill increase associated with the Thames Tideway Tunnel to be?  
Base AMP6 Year 4: All Thames Water Customers n=2248



# Billing affordability

The proposed bill increase is still seen as affordable by six in ten



↑↓ Significantly different to AMP6 Year 3 at 95%

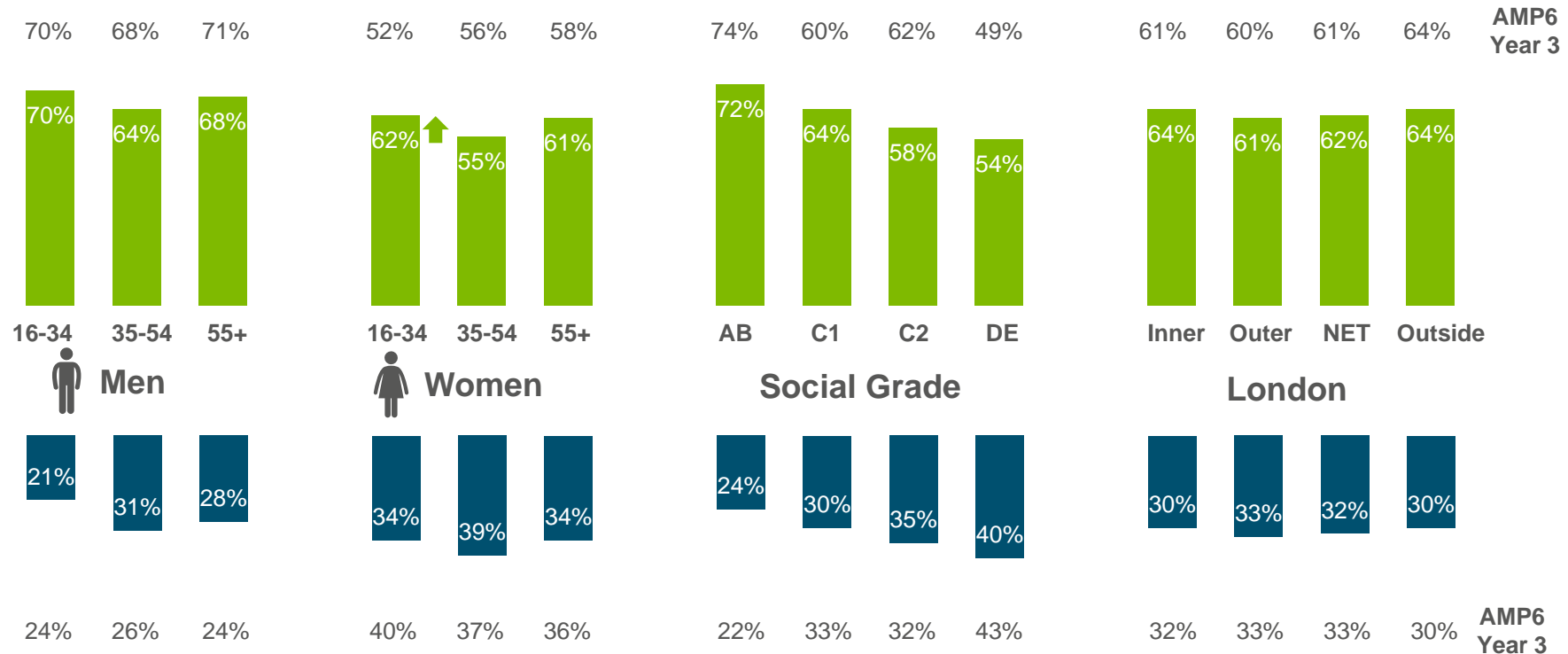
Q16. How affordable or unaffordable to you personally do you consider this bill increase to be?  
Base AMP6 Year 4: All Thames Water Customers n=2248



# Billing affordability by key demographics

Perceptions of affordability have increased significantly for women aged 16-34; while remaining stable across all other groups of interest

## Affordability



## Unaffordable

↑↓ Significantly different to AMP6 Year 3 at 95%

Q16. How affordable or unaffordable to you personally do you consider this bill increase to be?  
Base AMP6 Year 4: All Thames Water Customers n=2248



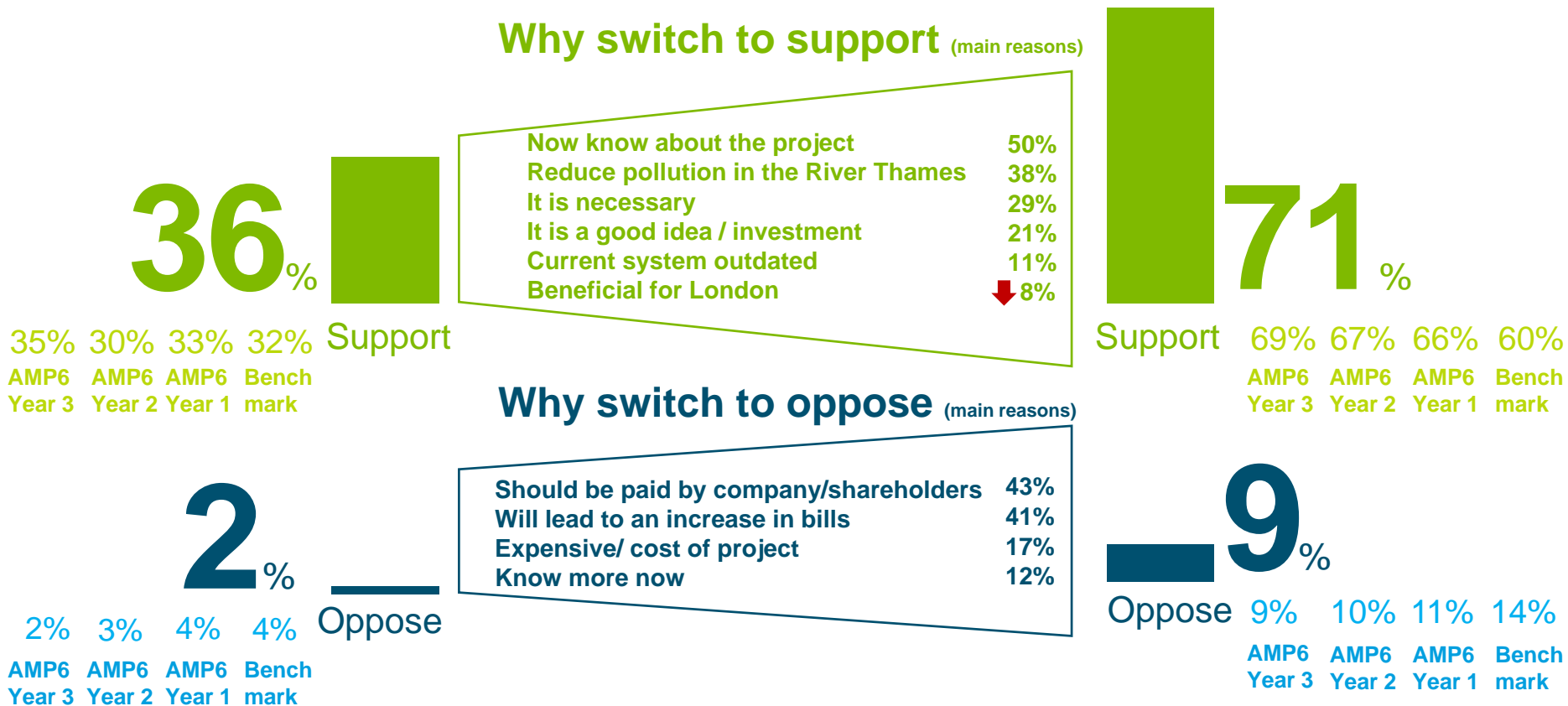


# Change in Support



# Reasons for switching support

After exposure to information about the TTT, support almost doubles as customers become more informed about the project, with support at its highest point yet



Support before additional information

Support following additional information

Q17. Now you have seen further information about the TTT, to what extent do you support or oppose? Q18. Why has your opinion changed? Base: n=2248, All those moving from neutral/ oppose to support n=821, All those moving from neutral/ support to oppose n=154



↑↓ Significantly different to AMP6 Year 3 at 95%





# Overall Findings



# Summary of key findings – Benchmark

1

Just over 4/10 customers are aware of the TTT, with large demographic differences

- Awareness is highest among males, people over 55, and those in social grade AB
- Knowledge of the TTT is poor – most awareness comes from news media

2

Support is positive: there are eight times more customers supporting the TTT than opposing it

- Support is stronger amongst those who know the most about it
- The main reasons for support is that it is necessary for the growing London population - the current system cannot meet current needs
- The main reason for opposition is that it is too expensive, leading to an increase in bills; and there are also doubts about the need for it

3

There is wide variance in perceived affordability of bill increases

- Those in the lowest social grade consider the bill increase less affordable than other groups - half of those in social grade DE say the increase is unaffordable for them

4

Further information on the TTT increased support but also hardened opposition

- Positive shifts in support come from finding out more about the sewerage problem, and why the TTT is necessary to address it
- The main reasons for becoming more negative are distress at the bill increase, or anger towards Thames Water for increasing customers' bills, not planning far enough ahead, and not funding the project out of their profits



# Summary of key findings – AMP6 Year 1

1

Overall levels of awareness of the TTT remain unchanged wave on wave at just over four in ten customers

- Men, especially older men, remain more aware of the TTT than females
- Awareness is higher for those of AB social grade and those living in London

2

Knowledge remains limited; with specific awareness that the TTT prevents untreated sewage entering the Thames falling wave on wave

- Knowledge remains low, with one in ten stating they know a great deal about the TTT – unchanged wave on wave
- Awareness that the TTT prevents untreated sewage entering the tidal river Thames has fallen to 28% (from 31%)

3

Support for the TTT remains significantly higher than opposition (33% vs 4%). Levels of support are unchanged from the Benchmark

- Support remains stronger amongst males, especially older males. Support within inner London has risen wave on wave now rising above the average levels of support
- The main reason to support the TTT is the recognition that it is necessary and a good investment for the growing London population

4

More than six in ten customers consider the bill impact to cover the cost of the TTT as acceptable

- Over six in ten customers consider the bill impact to be acceptable – significantly rising wave on wave from 56%
- Less than 3 in 10 consider the impact unacceptable, falling from 36%

5

Over twice as many customers consider the bill impact to be affordable than those who do not – affordability has risen on last wave

- 63% of customers consider the bill impact to be affordable compared to 31% who consider the increase to be unacceptable. Wave on wave the levels of perceived affordability have risen consistently across key customer groups
- Customers in lower social grades consider the bill increase less affordable

6

Further information on the TTT increased support but also hardened opposition. Support following information is higher than the Benchmark

- Additional information increased support for the TTT from 33% to 66%, although opposition hardened from 4% to 11%
- The positive shifts in support are driven by knowing more, understating benefits to the environment, and reconsidering the project as being necessary



# Summary of key findings – AMP6 Year 2

1

Overall awareness of the TTT has fallen from 43% to 36%, although 44% of inner London residents are aware of the TTT

This overall decline in awareness of the TTT is driven by a fall in the proportion of people seeing information about the TTT – particularly via the media

2

Mirroring the fall in awareness, composite understanding has also declined – from 35% to 31%

Less people know any of the specific details about the TTT versus last year; however most are still aware that the current sewer lacks capacity and as such, sewerage is entering the River Thames

3

Unprompted support for the TTT continues to significantly outweigh opposition, despite reducing from 33% to 30%

Men continue to demonstrate greater support than women, while those in London are more supportive than elsewhere in the Thames Water region

4

After information is provided about the details of the TTT, support more than doubles from 30% to 67%

This is consistent with the previous wave of the study, suggesting educating customers is essential in generating support

5

Two-thirds consider the proposed bill increase to help pay for the TTT as acceptable

Levels of acceptability are similar across men and women and those in and outside London; while acceptability is stronger among higher social grades

6

Perceived affordability of the proposed bill increase has softened from 63% to 60%

The lower social grades find it least affordable, however affordability has generally softened across all subgroups – possibly reflecting the greater financial uncertainty in the last 12 months



# Summary of key findings – AMP6 Year 3

- 1 Overall household awareness of the TTT has increased from 36% to 40%
- 2 Correspondingly, composite understanding has recovered after falling to 31%, and is now 36%
- 3 Unprompted support has reached its highest level (35%), but nearly two-thirds (63%) of the population remain ambivalent
- 4 Levels of support double once further information about the TTT is provided
- 5 More people than ever now consider the bill increase to be acceptable, with an increase from 65% to 68%
- 6 Around six in ten continue to find the proposed bill increase affordable, remaining above the benchmark wave

This increase in awareness is driven by more people reading, seeing or hearing about the TTT on radio or TV and in newspapers, magazines or online articles. One in ten continue to become aware via water companies

Whilst there is greater awareness of TTT specific details versus last year, composite understanding is at its highest level due to a greater awareness that millions of tonnes of sewerage enters the Thames each year

Support has increased across most key demographic groupings; men are considerably more supportive than women, as are those living in London and social grade AB

This is the highest level of support seen; being informed and reducing pollution in the Thames are key drivers of the increase in support

Levels of acceptability are relatively consistent across demographic groupings, with customers in London significantly more likely to find it acceptable versus last year

Perceptions of affordability have remained stable across all key demographic groups, with significant improvements for young men and social grade C2



# Summary of key findings – AMP6 Year 4

1

Overall household awareness of the TTT has remained in line

While there has been a significant increase in people hearing and seeing about the TTT via radio or TV programmes, less have seen about the TTT in online articles

2

Similarly, composite understanding has also remained in line with last year

This is despite the fact there has been a decline in customers recognising that the TTT will be paid for via the sewerage bills of all sewerage customers

3

Unprompted support is at its highest level (36%), although the majority are still ambivalent (62%)

Support is consistent versus last year across all demographic groupings, however, opposition has increased among social grade AB. Reasons for why people support the TTT are also in line versus last year, with the exception of a reduction in pollution / being good for the environment, which has significantly increased

4

Once further information about the TTT is provided, support for the project almost doubles

Knowing more about the project and the TTT reducing pollution in the river Thames are the key drivers for switching to support

5

The proportion finding the bill increase acceptable has remained in line, at its joint highest level

Levels of acceptability are relatively consistent across demographic groupings, except for customers in social grade C2, where acceptability has decreased significantly

6

The bill increase is seen as affordable by around 6 in 10, consistent with last year

Perceptions of affordability have remained stable across most key demographic groups. Young females are now significantly more likely to find the bill increase affordable.



## Household Waves:

Benchmark, AMP6 Year 1, AMP6 Year 2, AMP6 Year 3, AMP6 Year 4

## Non-Household Waves:

AMP6 Year 1, AMP6 Year 2, AMP6 Year 3, AMP 6 Year 4





# Summary of Non-Household Customer Views





# Key Performance Measures

Non-household awareness and composite understanding have remained stable year-on-year and remain in line with AMP6 Year 1 (2015/16)

|  | Benchmark<br>(2014/15) | AMP6 Year 1<br>(2015/16) | AMP6 Year 2<br>(2016/17) | AMP6 Year 3<br>(2017/18) | AMP6 Year 4<br>(2018/19) |
|--|------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Non-Household Awareness</b>                 | -                      | 36%                      | 36%                      | 37%                      | 37%                      |
| <b>Non-Household Composite Understanding**</b> | -                      | 28%                      | 27%                      | 26%                      | 29%                      |
| <i>Household Awareness</i>                     | 42%                    | 43%                      | 36%                      | 40%                      | -                        |
| <i>Household Composite Understanding**</i>     | 35%                    | 35%                      | 31%                      | 36%                      | -                        |

\*\*statements within composite understanding of the project

A) Millions of tonnes of untreated sewage enters the River Thames each year

D) The Thames Tideway Tunnel will prevent almost all untreated sewage entering the tidal River Thames

E) The Thames Tideway Tunnel will be paid for through the sewerage bills of all customers receiving a wholesale sewerage service from Thames Water\*

F) The Thames Tideway Tunnel will run for 15 miles from west to east London, mainly following the route of the Thames

\*The word 'wholesale' added to code E in AMP6 Year 3



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Summary of key findings – AMP6 Year 4

1 Nearly two in five non household customers remain aware of the TTT

Awareness has remained consistent since AMP6 Year 1, with a third continuing to become aware via media sources and one in ten through water companies.

2 Composite understanding of the TTT has also remained broadly stable versus last year (26% vs 29%)

Awareness of River Thames issues have continued to directionally increase, and have returned to their levels from AMP6 Year 1. Moreover, awareness that the TTT will last 100 years and will be paid for through the sewerage bills of all wholesale customers has significantly increased.

3 Unprompted support outweighs opposition (16% vs 1%) and is at its highest recorded level

Non-household customers in Outer London are significantly more supportive since AMP6 Year 3 (20% vs. 4%), and are now more supportive than Inner London for the first time. Wholesale retail customers are least supportive (7%) across all industries.

4 Once information about the TTT is provided, support increases from 16% to 44%

However, the level of support after information is provided has continued to decline, since reaching a high of 55% in AMP6 Year 2. Informing customers is crucial, whilst reducing pollution in the River Thames is a key factor for driving support of the TTT.

5 The proposed bill increase is deemed acceptable by 70%

This is a marginal decline since last year and has been driven by a significant increase in combined customers finding it unacceptable (29% vs. 22%).

6 70% continue to find the proposed bill increase affordable

There has been a significant increase in the number of non-household customers outside London finding the bill increase affordable versus last year (78% vs. 66%); but there has also been a significant increase in the proportion of non household customers in London finding it unaffordable (27% vs 20%).





# Full Report



# Contents



Background and approach



Awareness and familiarity



Support and opposition



Understanding



Billing



Change in support



Overall findings



Appendix





# Background and Approach



# Background to the non-household research

## Background

Thames Water have set up a long-term research programme to monitor customer opinion about the TTT amongst non-household customers and household customers (reported separately). Key measures tracked include:

- Awareness and knowledge of the TTT.
- Overall opinion and level of support for the TTT.
- Acceptability and affordability of the bill impact.

## Research approach

- Quantitative CATI survey amongst a sample of 500 Thames Water non-household customers, with an interview length of 15 minutes.
- Quotas are set to ensure wave on wave comparability, and that the sample remains representative of Thames Water non-household customers in terms of industry type, company size, customer type, and area. All respondents were responsible for decision making relating to water and sewerage.
- The first wave of fieldwork was conducted between 14<sup>th</sup> – 30<sup>th</sup> July 2015 (AMP6 Year 1)
- The second wave of fieldwork was conducted between 11<sup>th</sup> July – 1<sup>st</sup> August 2016 (AMP6 Year 2)
- The third wave of fieldwork was conducted between 6<sup>th</sup> July – 31<sup>st</sup> July 2017 (AMP6 Year 3)
- The fourth wave of fieldwork was conducted between 2<sup>nd</sup> July – 7<sup>th</sup> August 2018
- Full questionnaire is provided from page 61

Populus is one of the UK's leading independent research and strategy consultancies. Populus fully complies with the MRS Code of Conduct and is registered under the Data Protection Act, and is a founding member of the British Polling Council.



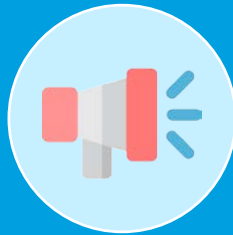
## Sample profile

|                      | AMP6 Year 4                 | Unweighted | Weighted |
|----------------------|-----------------------------|------------|----------|
|                      | Sample size                 | 504        | 504      |
| <b>Industry type</b> | Construction, mining etc.   | 15%        | 16%      |
|                      | Wholesale, retail           | 19%        | 14%      |
|                      | Accommodation/ food service | 11%        | 7%       |
|                      | Services                    | 28%        | 48%      |
|                      | Public orgs                 | 13%        | 9%       |
|                      | Other services              | 14%        | 7%       |
| <b>Company size</b>  | 0-9 employees               | 54%        | 90%      |
|                      | 10+ employees               | 45%        | 10%      |
| <b>Customer type</b> | Clean & Waste               | 77%        | 60%      |
|                      | Waste Water Only            | 23%        | 40%      |
| <b>Area</b>          | Inner London                | 41%        | 51%      |
|                      | Outer London                | 26%        | 18%      |
|                      | London (NET)                | 67%        | 69%      |
|                      | Outside London              | 34%        | 31%      |

*We are unable to provide findings by individual water company due to the low number of responses in each group*



# Awareness and Familiarity

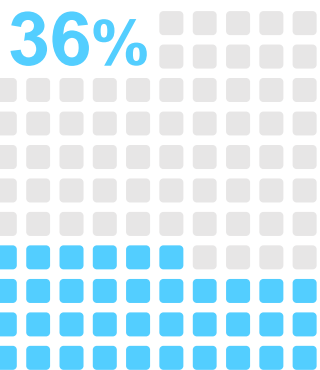


# Overall awareness of the TTT

Awareness of the TTT has remained stable, with nearly two in five of non-household Thames Water customers aware of the project

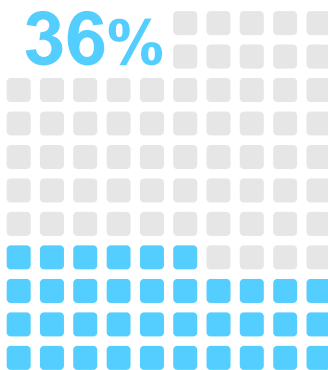
The Thames Tideway Tunnel or 'super sewer' is a major new sewer in London. Before today had you heard of the Thames Tideway Tunnel or 'super sewer'?

AMP6 Year 1



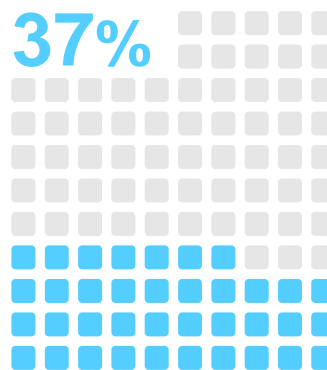
Customers aware of the TTT

AMP6 Year 2



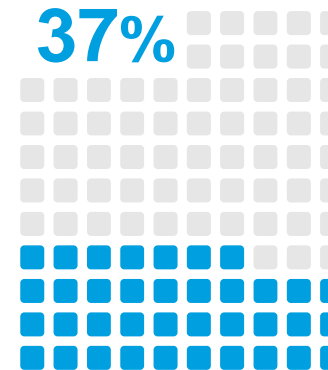
Customers aware of the TTT

AMP6 Year 3



Customers aware of the TTT

AMP6 Year 4



Customers aware of the TTT

Q13. The Thames Tideway Tunnel or 'super sewer' is a major new sewer in London. Before today had you heard of the Thames Tideway Tunnel or 'super sewer'?  
Base: All Thames Water non-household customers n=504

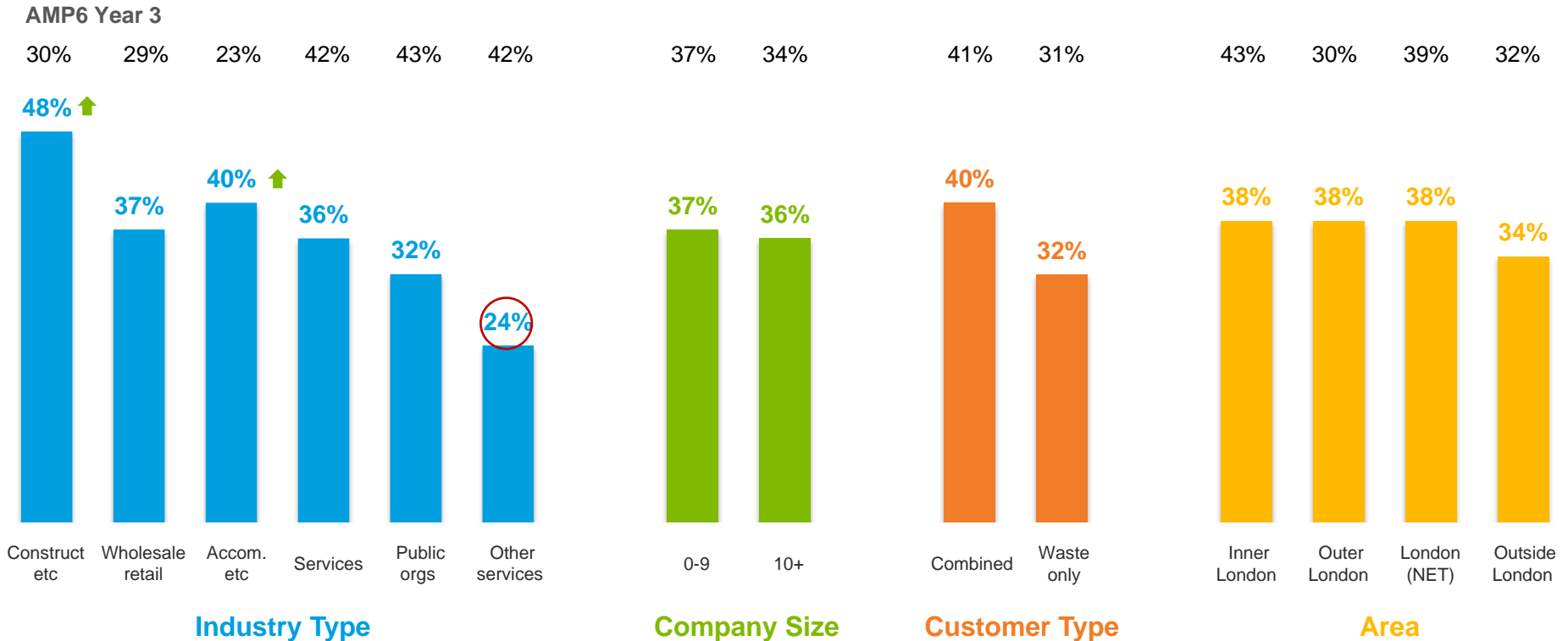


▲ ▼ Shows statistically significant difference to AMP6 Year 3 at 95%



# Awareness of the TTT by key firmographic

Awareness in Outer London is now on par with Inner London, while awareness has increased significantly amongst those in the construction and accommodation industries



Q13. The Thames Tideway Tunnel or 'super sewer' is a major new sewer in London. Before today had you heard of the Thames Tideway Tunnel or 'super sewer'?  
Base: All Thames Water non-household customers n=504

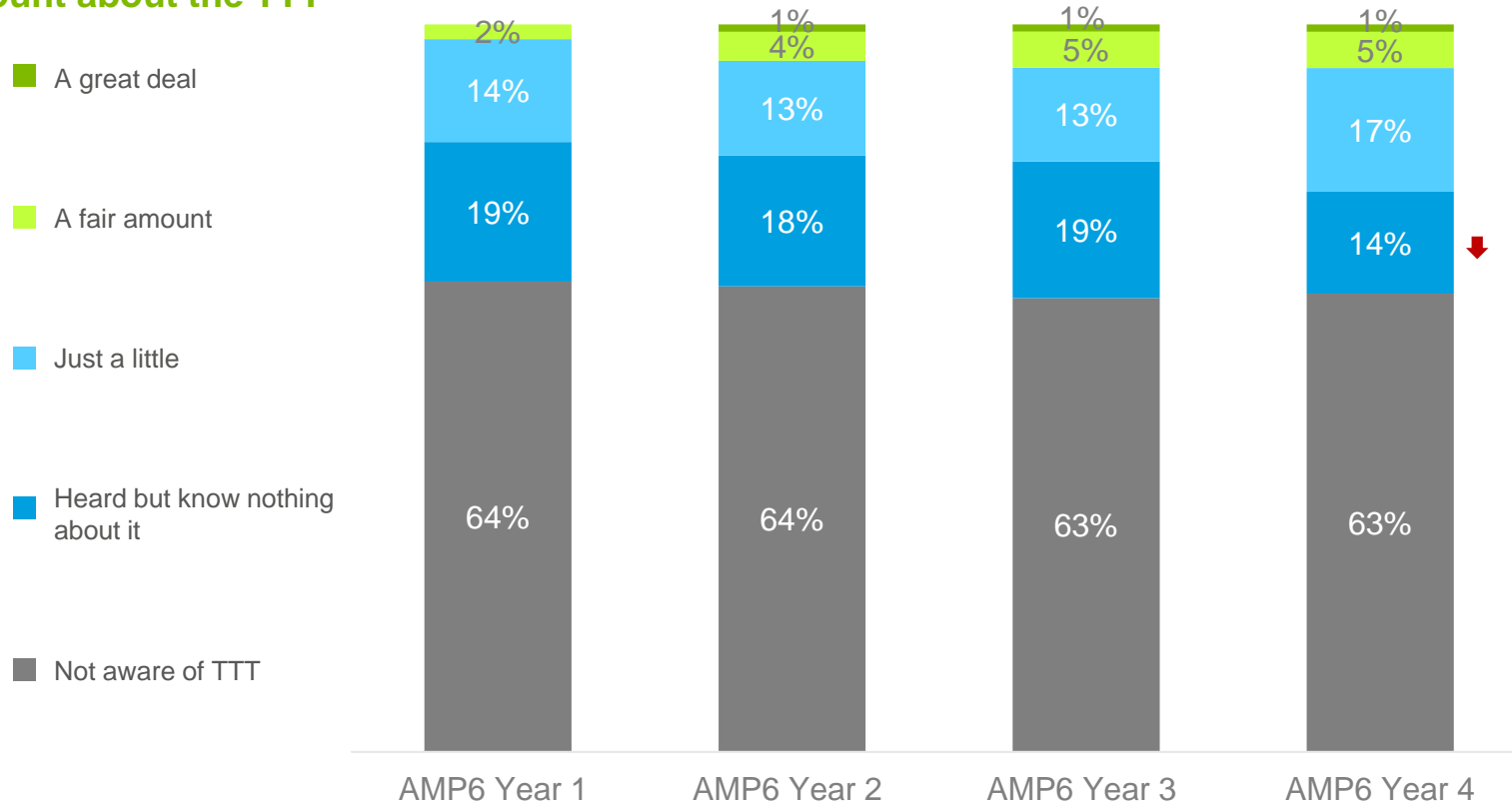


○ ○ Shows statistically significant difference to Total at 95%  
 ▲ ▼ Shows statistically significant difference to AMP6 Year 3 at 95%

# Knowledge of the TTT

Familiarity of the TTT has remained consistently low, with just six percent knowing a great or fair amount about it

Know a great deal/a fair amount about the TTT



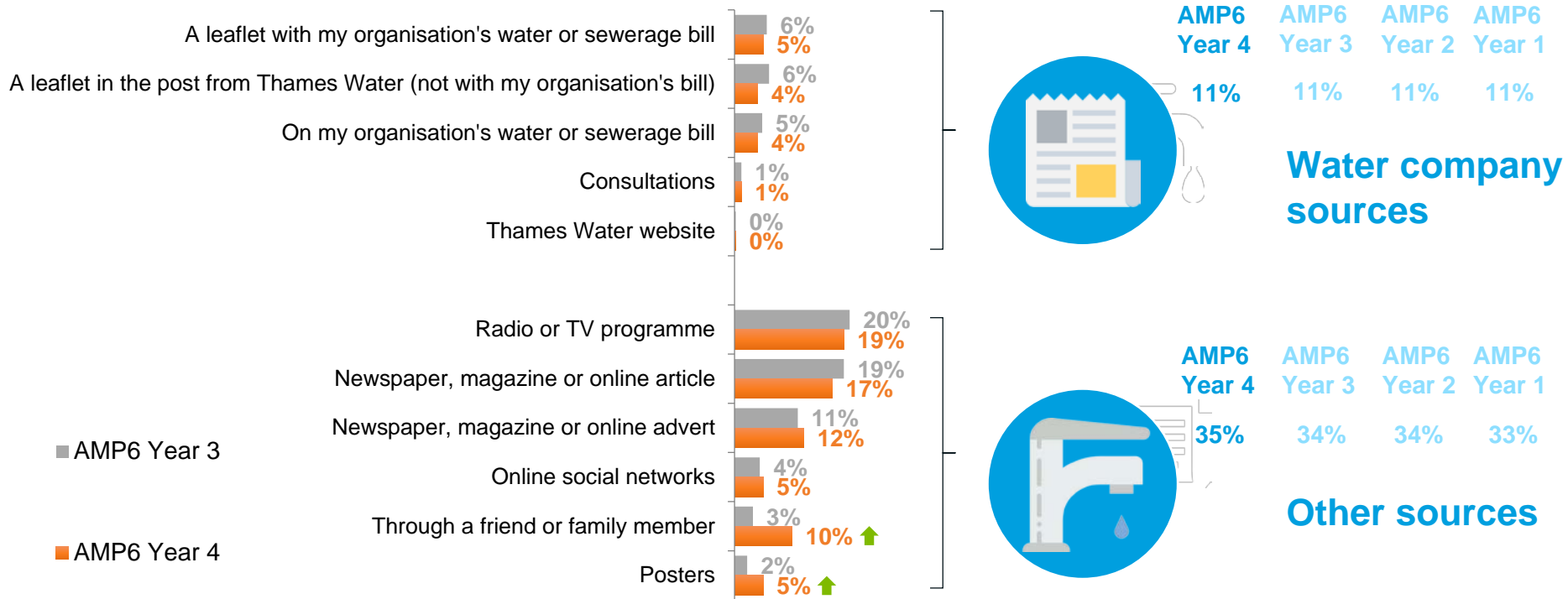
Q.15 How much, if anything, would you say your organisation knows about the Thames Tideway Tunnel?  
Base: All Thames Water non-household customers n=504



▲ ▼ Shows statistically significant difference to AMP6 Year 3 at 95%

# Where read, seen or heard about the TTT

One in ten continue to become aware of the TTT through water company sources, while a third still become aware of the TTT through media sources. More non-household customers are now being told about the TTT through a friend or family member



**Not aware: 63%**

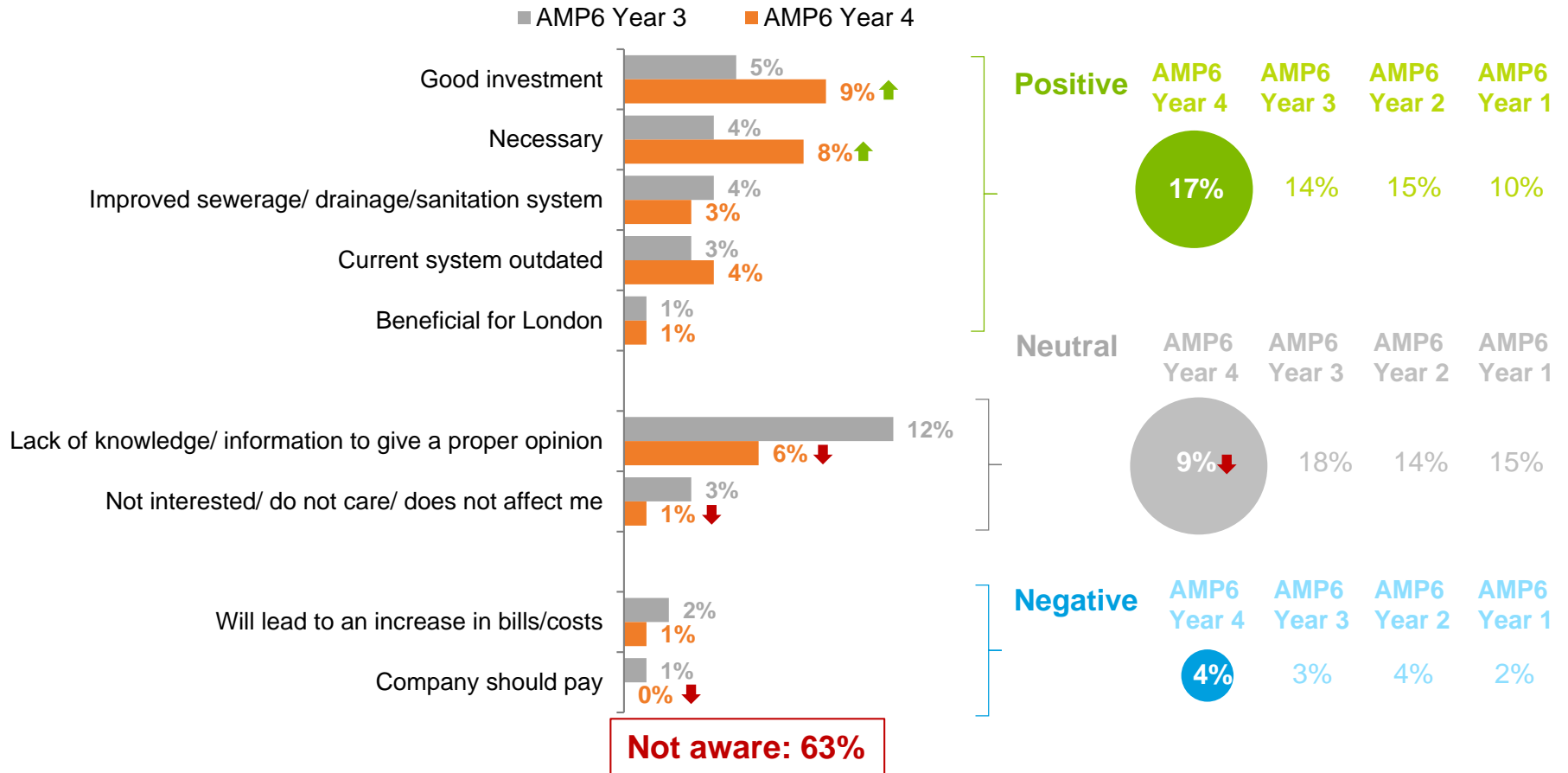
Q14. In which of the following ways, if any, have you read, seen or heard about the Thames Tideway Tunnel?  
Base: All Thames Water non-household customers n=504



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Overall opinion of the TTT

Ambivalence towards the TTT has declined, as non-household customers are less likely to feel uninformed. As such, there has been a significant increase in those thinking the TTT is necessary and a good investment



Q.16 What is your organisation's opinion of the Thames Tideway Tunnel?  
Please tell us in as much detail as possible.  
Base: All Thames Water non-household customers n=504



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Overall opinions of the TTT

Positive opinions relate to the TTT being necessary due to London's ageing sewer system and growing population, while negative comments relate to its cost and who is paying for it

## Positive comments

*"It's a necessary requirement because its and old system that needs to be changed to cope."*

Construction, 1-9 employees

*"it needs to be done because there is a current demand for it and we need the extra facilities to keep up with todays population."*

Services, 500+ employees

*"I think it's a good thing because the sewage system around London is really old so it does need some updating because we have had a couple floods when there's been thunderstorms and it's backed up."*

Wholesale, 1-9 employees

## Negative comments

*"Its expensive, its going to cost everybody in the area, we all have to pay our share."*

Construction, 1-9 employees

*"I suppose the main issue is we are irritated we will be paying for it... it is mostly for the Londoners, we have little to no benefit of it."*

Services, 250-499 employees

*"It is necessary but it should be a cost to London. It is nonsense that it is being charged to Thames Water customers. If my company was 8 miles up the road, we would not have to pay. It should be London and to the East."*

Services, 10-49 employees

Q.16 What is your organisation's opinion of the Thames Tideway Tunnel? Please tell us in as much detail as possible. Base: All non-household customers aware of the TTT (192)



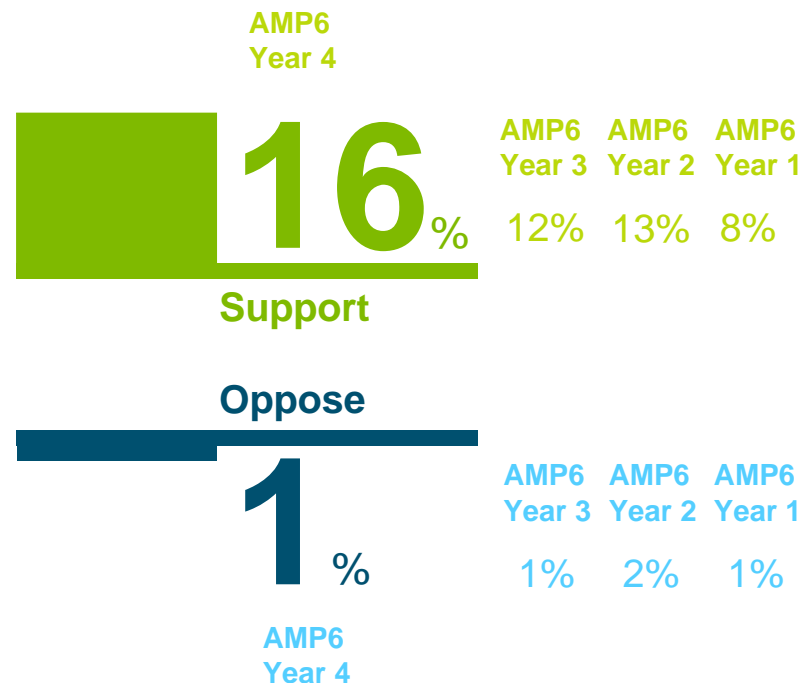
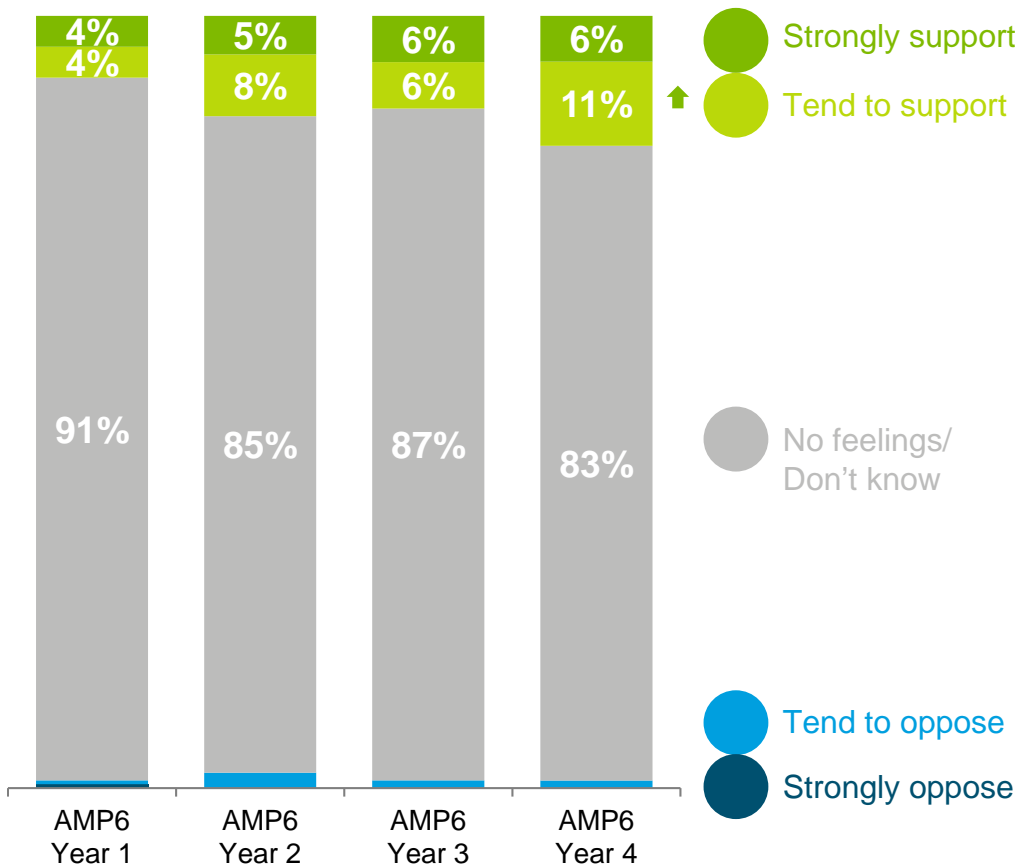


# Support and Opposition



# Unprompted support for the TTT

Unprompted support for the TTT is at its highest level recorded due to some of those who were ambivalent becoming supporters



Q.17 To what extent does your organisation support or oppose the Thames Tideway Tunnel, or is there no feeling either way?  
Base: All Thames Water non-household customers n=504

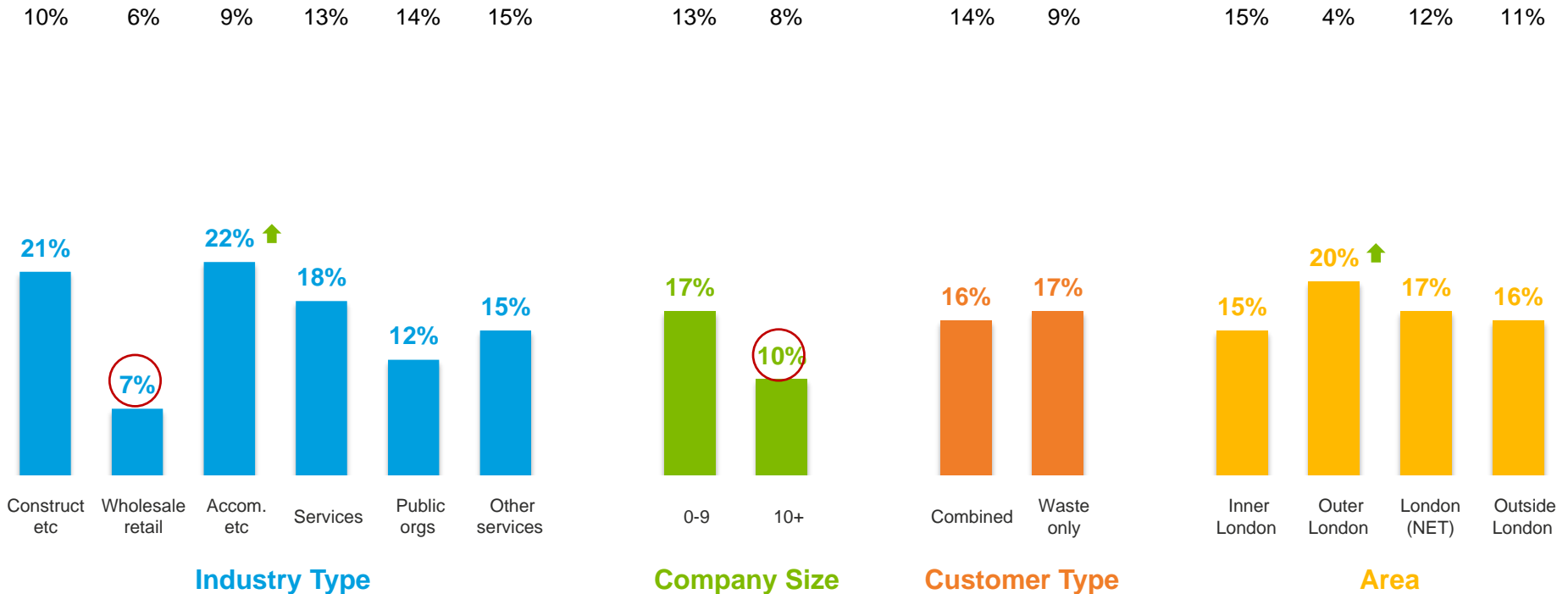


▲ ▼ Shows statistically significant difference to AMP6 Year 3 at 95%

# Unprompted support for the TTT by key firmographic

Support has increased significantly in Outer London, which is now more supportive than Inner London. Support has also increased amongst the construction and accommodation industries, now making them the most supportive industries

AMP6 Year 3



Q.17 To what extent does your organisation support or oppose the Thames Tideway Tunnel, or is there no feeling either way?  
Base: All Thames Water non-household customers n=504

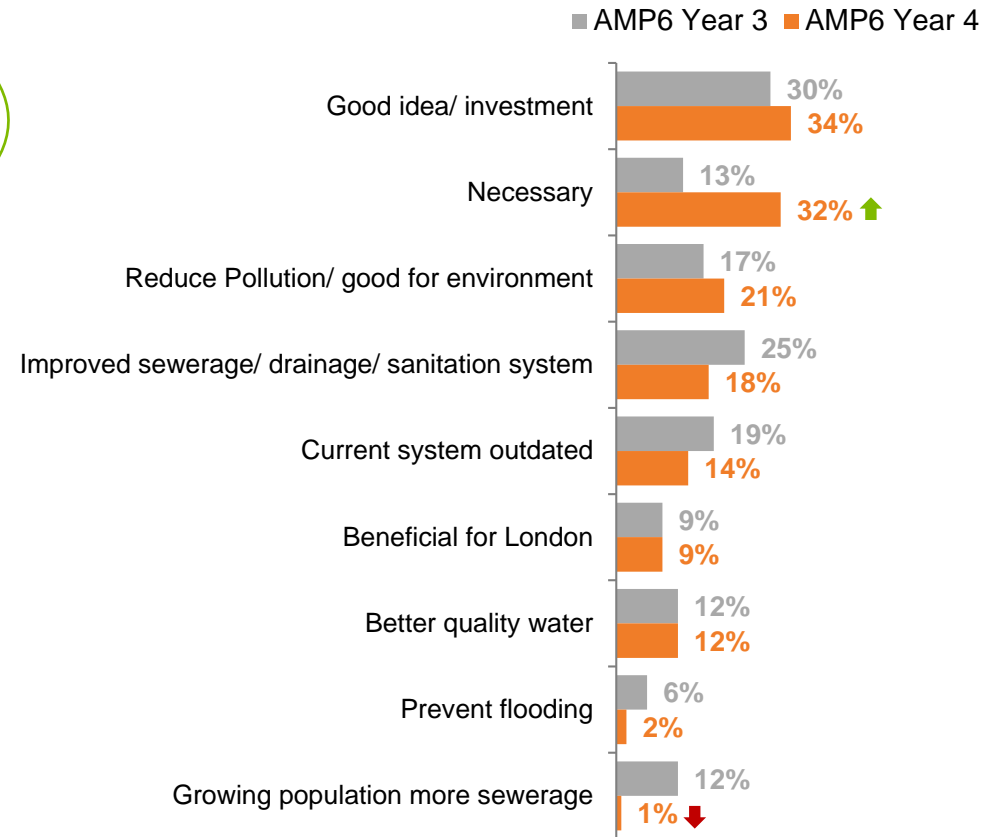


○ ○ Shows statistically significant difference to Total at 95%  
 ▲ ▼ Shows statistically significant difference to AMP6 Year 3 at 95%



# Reasons for supporting the TTT

The main reasons for supporting the TTT are that it is seen as a good idea and is necessary



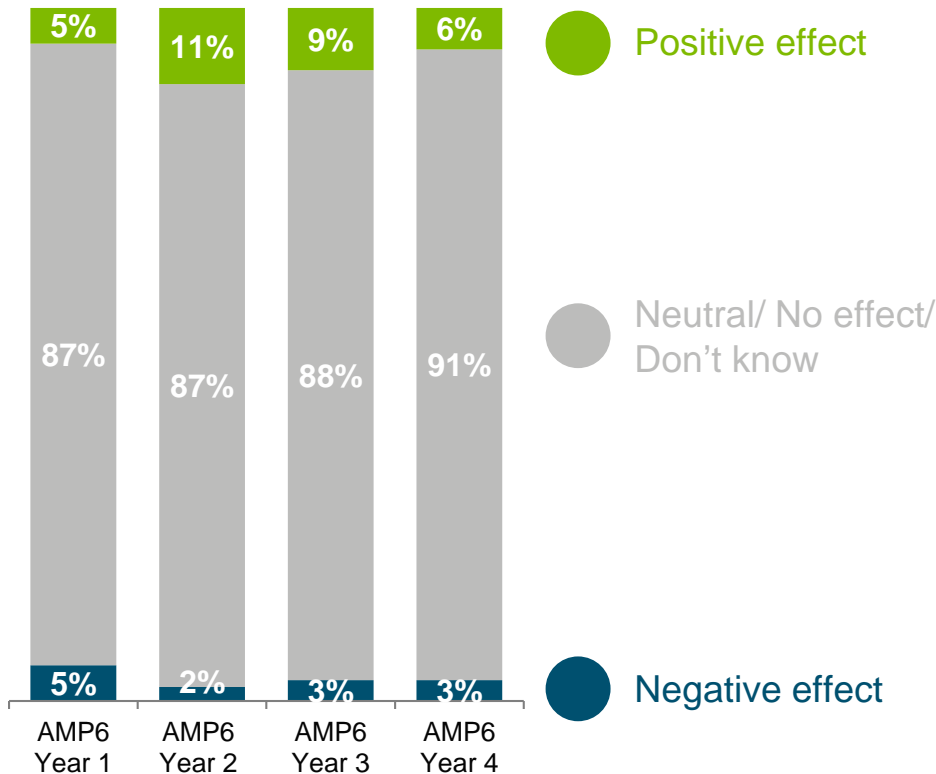
Q.18 Why do you say your organisation supports the Thames Tideway Tunnel?  
Base: All non-household customers who support the TTT n=73  
\*Reasons for opposing – Base too small to profile



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Effect of the TTT on the organisation

Nine in ten think the TTT will have no impact on their organisation, with the proportion who think it will have a positive impact among Outer London companies returning to its level from AMP6 Year 2



## Positive effect by sub group

|               |                           | AMP6 Year 1 | AMP6 Year 2 | AMP6 Year 3 | AMP6 Year 4 |
|---------------|---------------------------|-------------|-------------|-------------|-------------|
| Industry type | Construction, mining etc. | 10%         | 6%          | 9%          | 9%          |
|               | Wholesale, retail         | 6%          | 8%          | 6%          | 5%          |
|               | Accommodation             | 11%         | 11%         | 12%         | 10%         |
|               | Services                  | 9%          | 16%         | 9%          | 5%          |
|               | Public orgs               | 11%         | 9%          | 14%         | 7%          |
|               | Other services            | 4%          | 6%          | 4%          | 5%          |
| Aware of TTT  | Yes                       | 15%         | 13%         | 13%         | 11%         |
|               | No                        | 5%          | 10%         | 6%          | 3%          |
| Customer type | Clean & Waste             | 11%         | 12%         | 8%          | 7%          |
|               | Waste Water Only          | 2%          | 9%          | 9%          | 4%          |
| Area          | Inner London              | 11%         | 16%         | 9%          | 7%          |
|               | Outer London              | 8%          | 8%          | 15%         | 8% ↓        |
|               | London (NET)              | 10%         | 14%         | 10%         | 7%          |
|               | Outside London            | 4%          | 6%          | 5%          | 4%          |

Q.19 How do you think your organisation will be affected by the Thames Tideway Tunnel, if at all?  
Base: All Thames Water non-household customers n=504



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

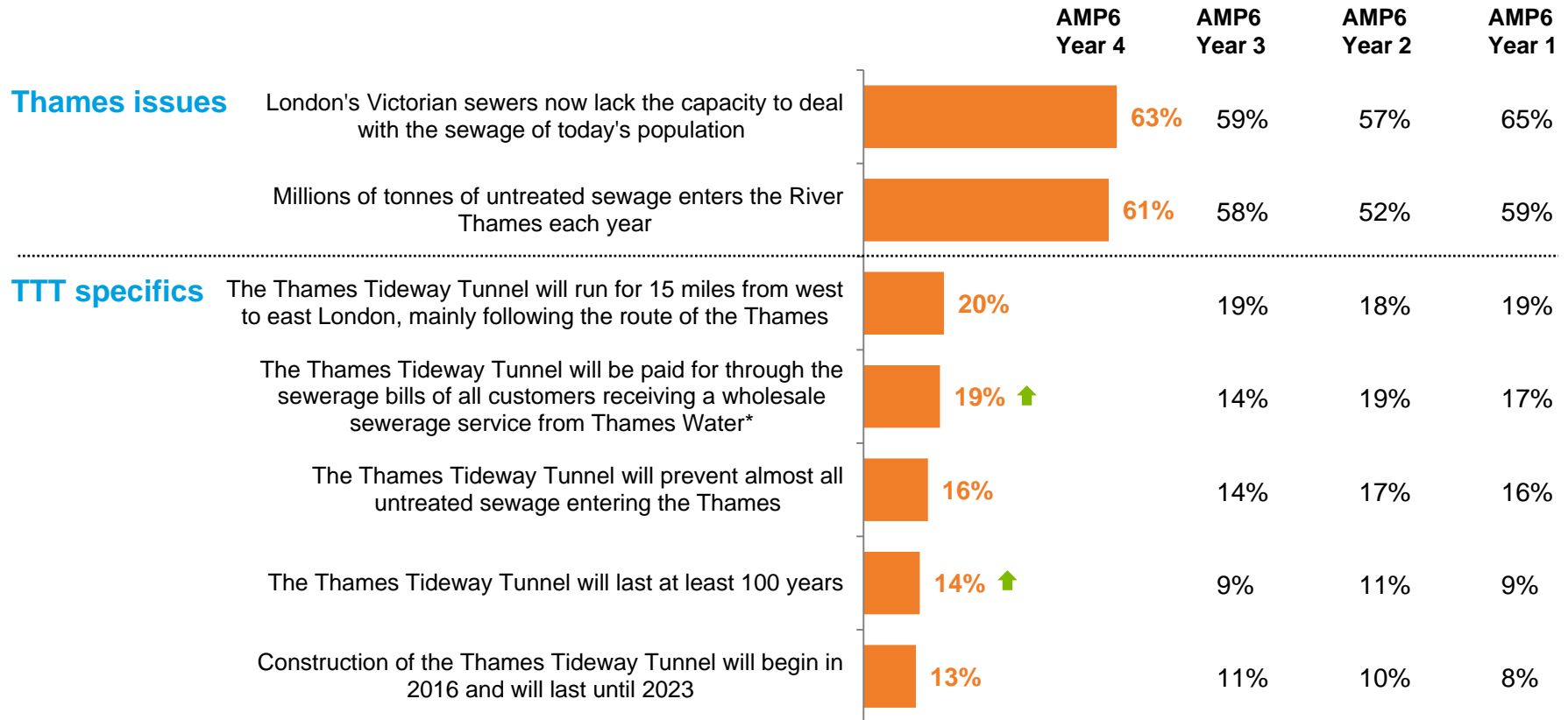


# Understanding



# Levels of awareness and understanding

Just over six in ten are aware of the Thames specific issues, a slight improvement on AMP6 Year 3. Awareness that the TTT will be paid for through customers' sewerage bills and that the TTT will last 100 years have increased significantly



\*The word '**wholesale**' added to code in AMP6 Year 3

Q.20a/b Which, if any, of the following was your organisation aware of before today?

Base: Thames issues: All Thames Water non-household customers n=504



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Key Performance Measures

Non-household awareness and composite understanding have remained stable year-on-year and remain in line with AMP6 Year 1

|  | Benchmark<br>(2014/15) | AMP6 Year 1<br>(2015/16) | AMP6 Year 2<br>(2016/17) | AMP6 Year 3<br>(2017/18) | AMP6 Year 4<br>(2018/19) |
|--|------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <b>Non-Household Awareness</b>                 | -                      | 36%                      | 36%                      | 37%                      | 37%                      |
| <b>Non-Household Composite Understanding**</b> | -                      | 28%                      | 27%                      | 26%                      | 29%                      |
| <i>Household Awareness</i>                     | 42%                    | 43%                      | 36%                      | 40%                      | -                        |
| <i>Household Composite Understanding**</i>     | 35%                    | 35%                      | 31%                      | 36%                      | -                        |

\*\*statements within composite understanding of the project

A) Millions of tonnes of untreated sewage enters the River Thames each year

D) The Thames Tideway Tunnel will prevent almost all untreated sewage entering the tidal River Thames

E) The Thames Tideway Tunnel will be paid for through the sewerage bills of all customers receiving a wholesale sewerage service from Thames Water\*

F) The Thames Tideway Tunnel will run for 15 miles from west to east London, mainly following the route of the Thames

\*The word 'wholesale' added to code E in AMP6 Year 3



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%



# Billing



# Information provided on the TTT – AMP6 Year 4

## Information read out to customers as part of the telephone survey

### Information on TTT

The Thames Tideway Tunnel (the ‘super sewer’) is a major new sewer in London that will be built from 2016 to **2024**. It will prevent almost all untreated sewage entering the tidal River Thames.

Until the tunnel is built millions of tonnes of untreated sewage will continue to enter the River Thames in a typical year.

This mostly happens during periods of heavy rain when sewers become overloaded with sewage and rainwater.

The tunnel will help capture untreated sewage before it enters the River Thames.

It will run for around 15 miles from west to east London, mostly following the route of the River Thames.

The tunnel will last for at least 100 years. It will improve the river environment both for wildlife (including fish) and people.

Parliament has decided that the tunnel is necessary and should be paid for through the **wastewater** bills of all customers receiving a wholesale **wastewater** service from Thames Water.

### Information on TTT payment

As with all the company’s investments, the Thames Tideway Tunnel will be paid for through the **wastewater** bills of all customers receiving a wholesale **wastewater** service from Thames Water. This includes your organisation.

**10%** of the average **wastewater** bill for **2018/19** is associated with this project. That amount will need to increase to around **11%** by 2020, **plus an adjustment for inflation**.

However, over this period the costs of other aspects of Thames Water’s work are expected to come down, which means the tunnel can be built while keeping customers’ wastewater bills around their current price, before inflation, until at least 2020.

The later stages of construction after 2020 will require some further increases.

#### MORE INFORMATION ON INFLATION:

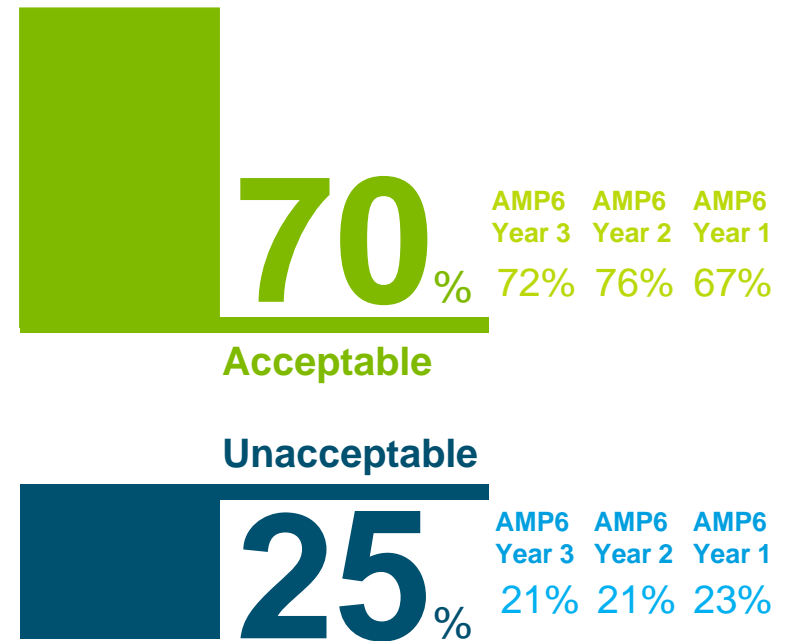
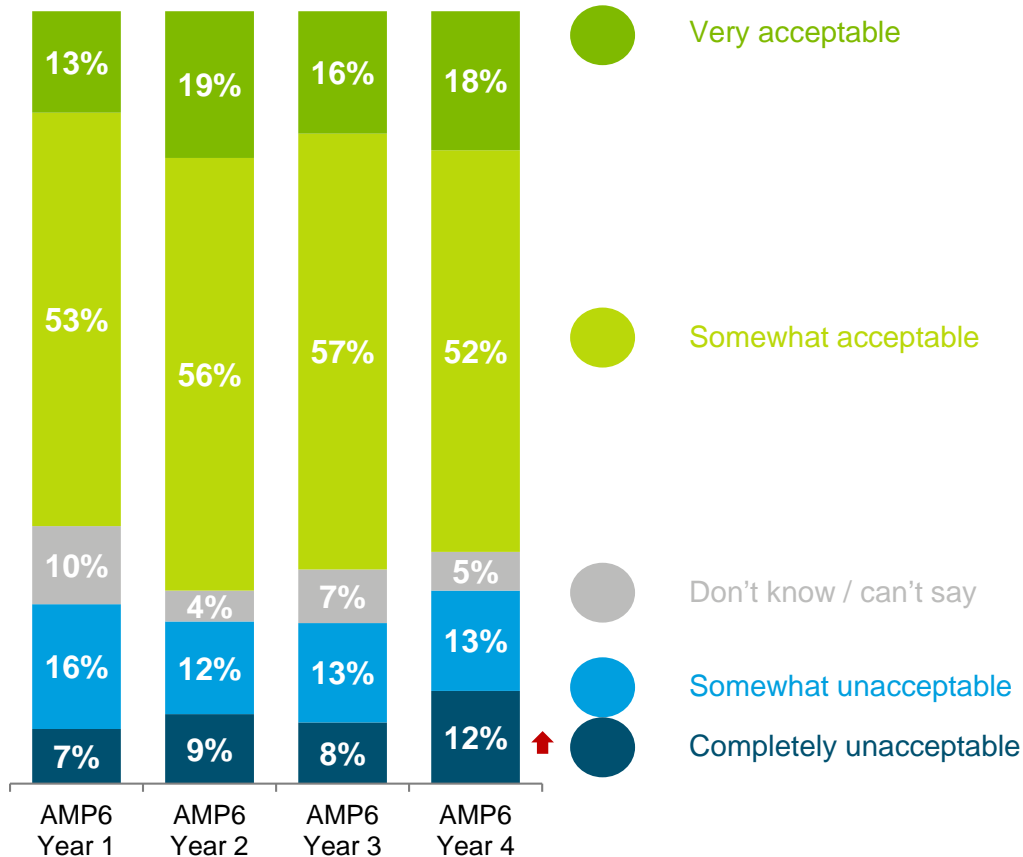
The forecast bill amounts do not include the effect of inflation. Inflation is the general rise in prices over time. In addition to any other changes, bills will also rise each year in line with inflation.

**Changes from AMP6 Year 3 and AMP6 Year 4 are highlighted in blue**



# Billing acceptability

Acceptability of the bill increase has continued to decline since AMP6 Year 2, with a significant increase in non-household customers feeling that the bill increase is completely unacceptable since last year



Q.22 How acceptable or unacceptable do you consider this bill increase associated with the Thames Tideway Tunnel to be to your organisation?  
Base: All Thames Water non-household customers n=504



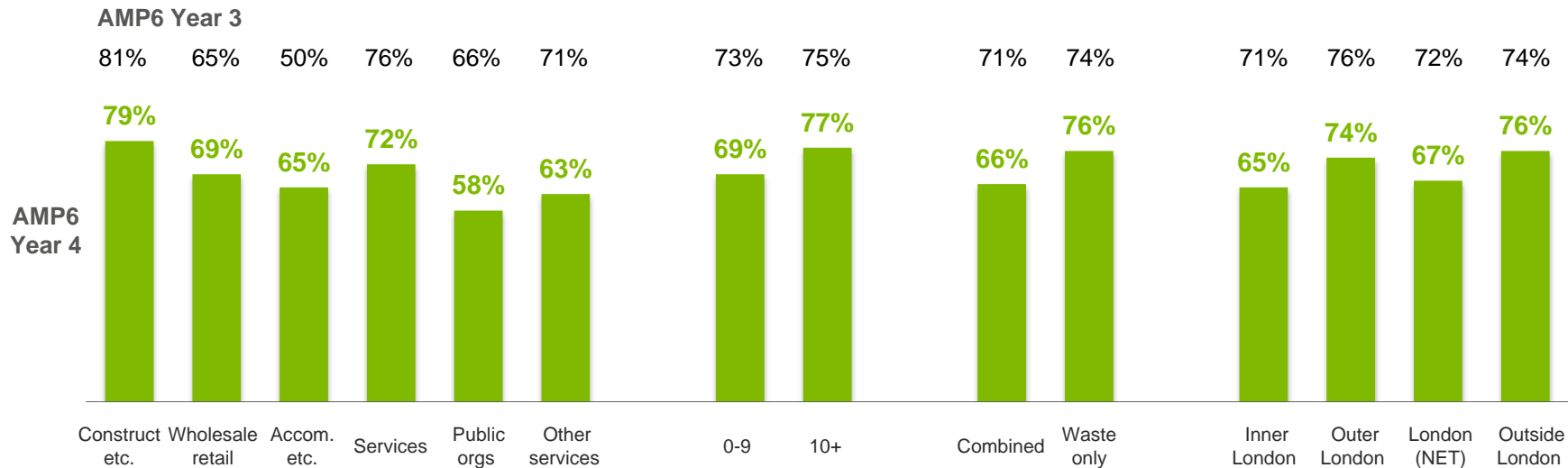
↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%



# Billing acceptability by key firmographic

Combined customers are more likely to find the proposed bill increase unacceptable compared to last year; whilst larger companies are less likely to find it unacceptable

## Acceptable

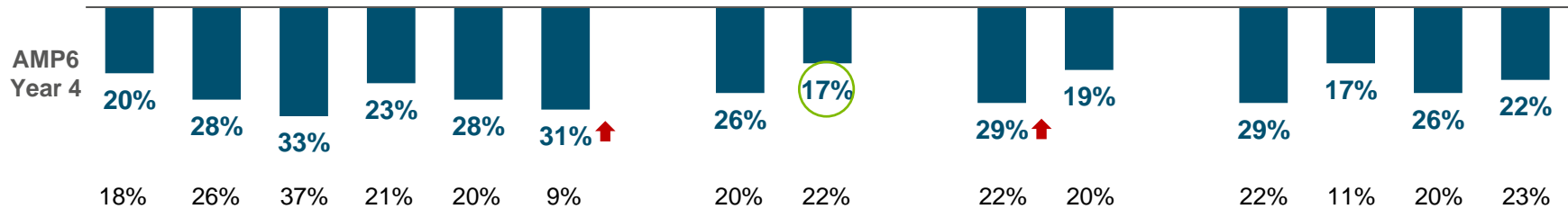


## Industry Type

## Company Size

## Customer Type

## Area



## Unacceptable

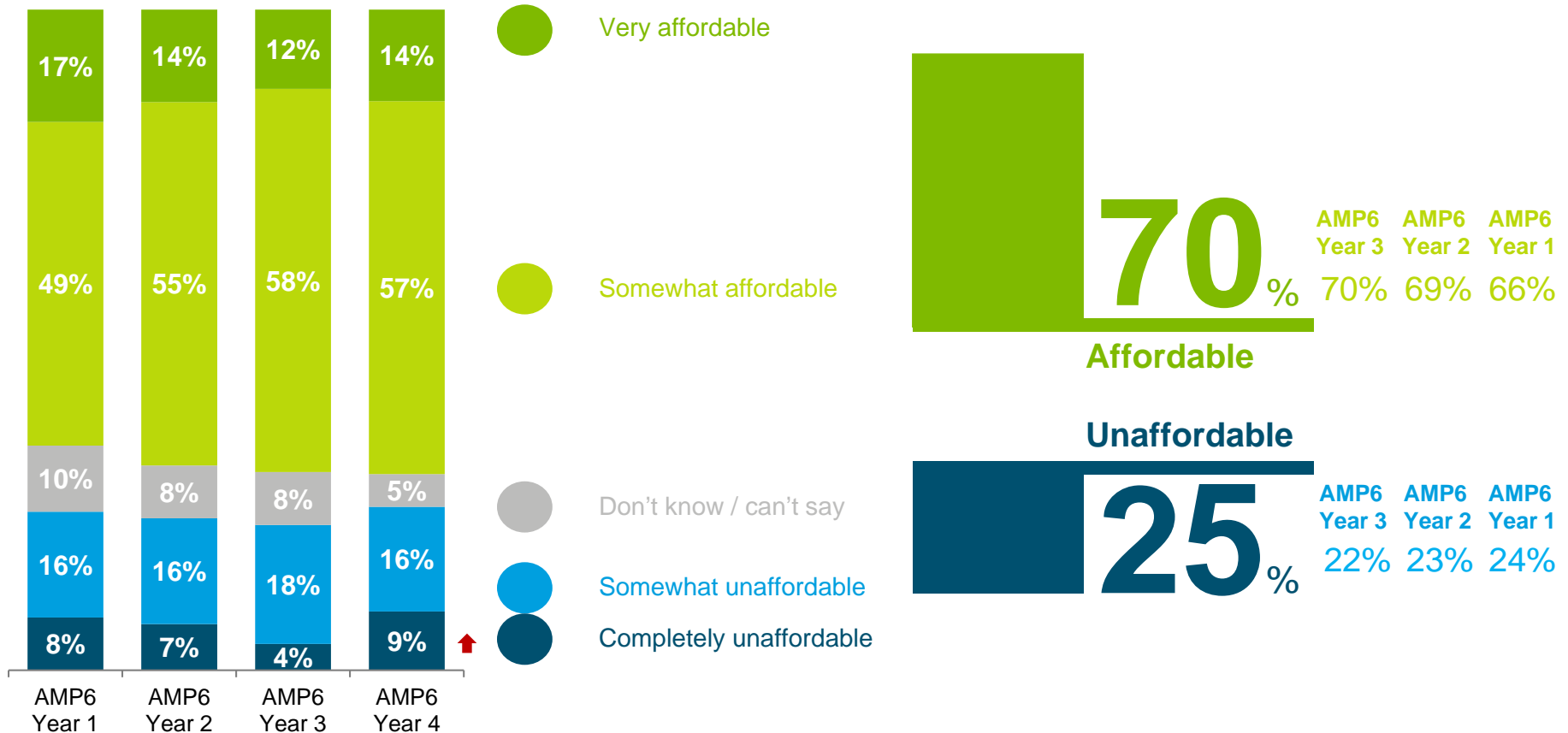
Q.22 How acceptable or unacceptable do you consider this bill increase associated with the Thames Tideway Tunnel to be to your organisation?  
Base: All Thames Water non-household customers n=504



○ ○ Shows statistically significant difference to Total at 95%  
↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Billing affordability

Seven in ten continue to find the proposed bill increase affordable, although a higher proportion now find it completely unaffordable



Q.23 How affordable or unaffordable to your organisation do you consider this bill increase to be?  
Base: All Thames Water non-household customers n=504

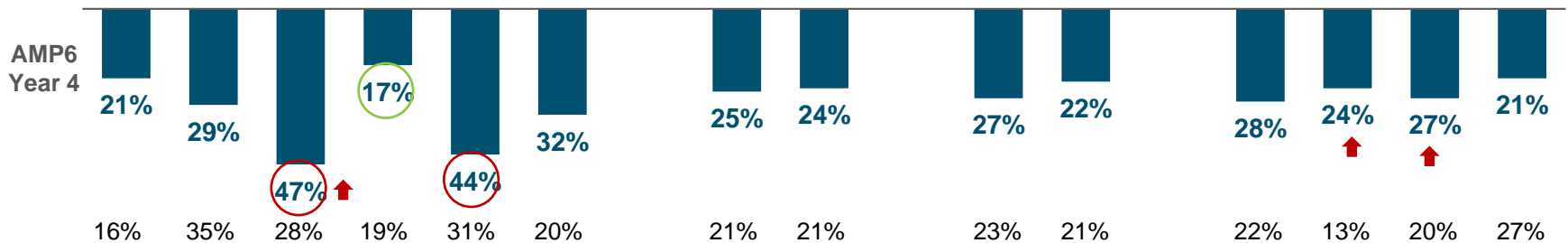
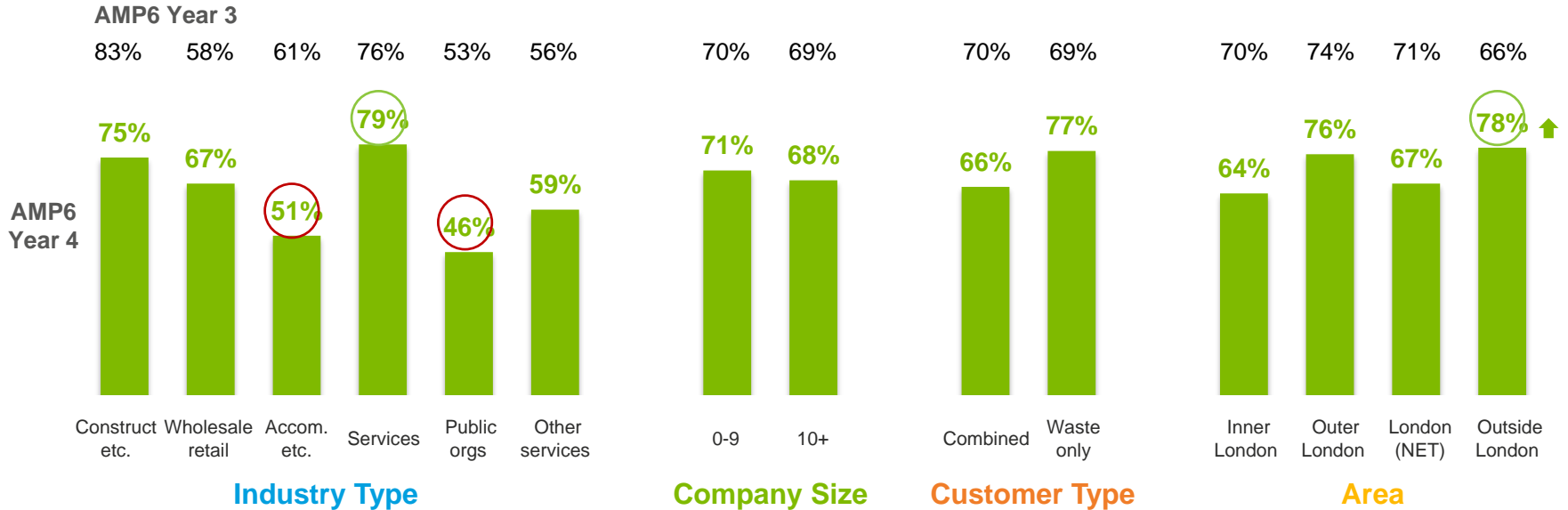


↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

# Billing affordability by key firmographic

The proposed bill increase is deemed least affordable by accommodation companies and public organisations, with those outside London finding it more affordable than those in Inner London

## Affordable



## Unaffordable

Q.22 How affordable or unaffordable to your organisation do you consider this bill increase to be?

Base: All Thames Water non-household customers n=504



○ ○ Shows statistically significant difference to Total at 95%  
 ↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%

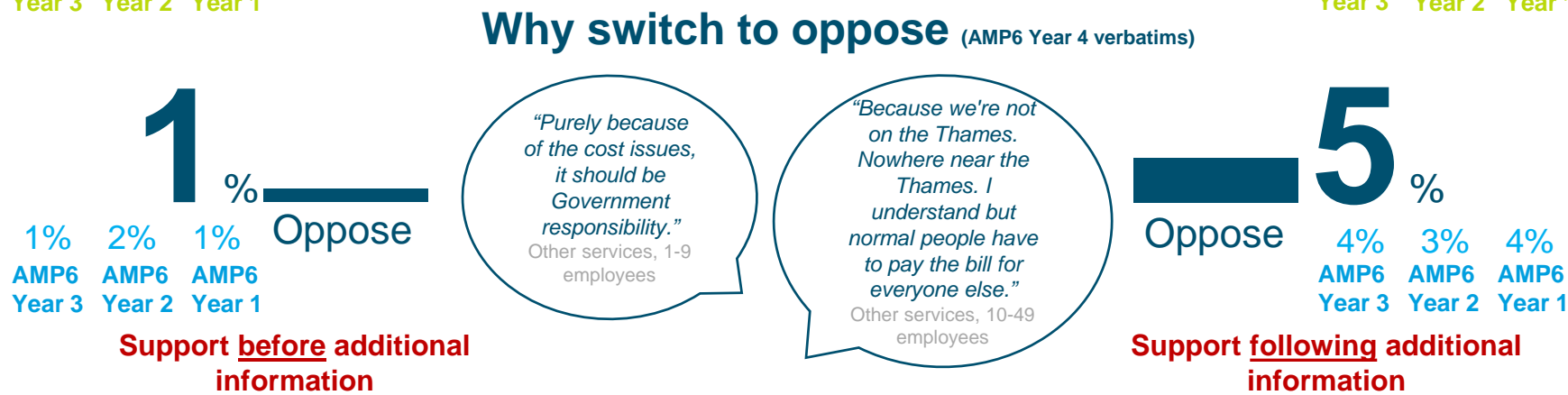


# Change in Support



# Reasons for switching support

After showing information about the TTT, the level of support is 44%, which is the lowest level to date. However, the level of opposition is only 5%, as most are ambivalent



Q.17/ Q.24 To what extent does your organisation support or oppose the Thames Tideway Tunnel, or is there no feeling either way? Base: All Thames Water non-household customers n=504. Q.25 Why has your opinion changed towards the Thames Tideway Tunnel? Base: All those moving from neutral/oppose to support n=162. \*Switch from to oppose – Base too small to profile



↑ ↓ Shows statistically significant difference to AMP6 Year 3 at 95%



# Overall Findings



# Summary of key findings – AMP6 Year 1

**1** Over one third of Thames Water non-household customers are aware of the TTT (lower than amongst households)

- Organisations in the public sector are less aware of the TTT than the private sector. Higher aware is more evident amongst organisations in inner London
- Levels of familiarity with the TTT are low amongst non-household customers with just 2% stating they know a fair amount (versus households at 9%)

**2** Support for the TTT is higher than opposition, but both are at extremely low levels – nine in ten companies have no feeling either way

- Support is stronger amongst construction companies, with little variance in levels of support by company size, area or type
- The main reason to support the TTT is recognition that it is necessary for the growing London city population as the current system cannot meet requirements

**3** Organisational bill increases related to the TTT are overwhelmingly seen as affordable

- Almost three times as many customers regard the bill increase as affordable as those who do not
- The services sector, those in Outer London, and larger companies are more positive about affordability. The accommodation/food service sector is least likely to say it's affordable

**4** Further information on the TTT dramatically increases non household customer support

- Further information on the TTT increased support for the project six-fold, to 49%. Although almost half still have no opinion after the additional information is shared
- Positive shifts in support come from finding out more about the sewerage problem, and why the TTT is necessary to address it



# Summary of key findings – AMP6 Year 2

1

Over one third (36%) of Thames Water Non Household customers are aware of the TTT.

- Awareness is unchanged since 2015; although there has been no campaign activity during this time period.
- Levels of familiarity with the TTT have risen but are still low amongst Non Household customers with just 5% stating they know a great deal or a fair amount (vs. 2% at AMP6 Year 1).

2

Support for the TTT has significantly increased, but is still low (13% vs. 8% in 2015) – three quarters are neutral.

- Support is stronger amongst accommodation/food service companies (23%), those in Inner London (18%), and combined water customers (14%)
- The main reason to support the TTT is still the recognition that it is necessary as the current system cannot meet requirements.

3

Perceived acceptability of the bill increase has increased to 76%

- Bill acceptability has increased significantly since 2015 (67%)
- The rise is driven by the wholesale and retail industry, as well as other services

4

TTT related bill increases are seen as affordable by 69% of customers, marginally increasing year on year.

- Three times as many customers regard the bill increase as affordable as those who do not.
- The other services sector (78%) and combined water service companies (71%) are more positive about affordability. The Accommodation/Food service sector is still the least likely to say it's affordable (50%).

5

Further information on the TTT dramatically increases Non Household customer support.

- Further information on the TTT increased support for the project by a factor of four, to 55% (a 6 % point increase from AMP6 Year 1). Opposition and ambivalence have decreased this wave.
- Positive shifts in support address the necessity and idea of a cleaner River Thames.





# Summary of key findings – AMP6 Year 3

1

Just over a third (37%) of non-household customers are aware of the TTT

Awareness has remained stable since the first wave of research in AMP6 Year 1. A third of non-household customers become aware of the TTT through media sources and one in ten through water company sources.

2

Composite understanding of the TTT has also remained stable at 26% (vs 27% last year)

Awareness of River Thames issues has directionally increased, however, significantly fewer non-household customers (14%) are aware that the TTT will be paid for through the sewerage bills of all wholesale sewerage customers versus last year (19%).

3

Unprompted support outweighs opposition (12% vs 1%). The vast majority are ambivalent

Non-household customers in Inner London are most supportive (15%), while those in Outer London are least supportive (4%). 11% of non-household customers outside London are supportive.

4

Once information about the TTT is provided, support increases from 12% to 48%

However, the level of support after information is provided is significantly lower than last year (48% vs 55%). Information drives support, with reducing pollution in the River Thames a key driver.

5

The proposed bill increase is deemed acceptable by 72%

This is a slight decline (4 percentage points) versus last year. There has been a significant decline in Inner London non-household customers finding the bill increase acceptable (71%) versus last year (80%).

6

70% continue to find the proposed bill increase affordable

There has been a significant increase in the number of construction businesses finding the bill increase affordable versus last year (83% vs 61%) and a significant decrease in the number of wholesale/retail businesses finding it affordable (58% vs 72%).



# Summary of key findings – AMP6 Year 4

1 Nearly two in five non household customers remain aware of the TTT

Awareness has remained consistent since AMP6 Year 1, with a third continuing to become aware via media sources and one in ten through water companies.

2 Composite understanding of the TTT has also remained broadly stable versus last year (26% vs 29%)

Awareness of River Thames issues have continued to directionally increase, and have returned to their levels from AMP6 Year 1. Moreover, awareness that the TTT will last 100 years and will be paid for through the sewerage bills of all wholesale customers has significantly increased.

3 Unprompted support outweighs opposition (16% vs 1%) and is at its highest recorded level

Non-household customers in Outer London are significantly more supportive since AMP6 Year 3 (20% vs. 4%), and are now more supportive than Inner London for the first time. Wholesale retail customers are least supportive (7%) across all industries.

4 Once information about the TTT is provided, support increases from 16% to 44%

However, the level of support after information is provided has continued to decline, since reaching a high of 55% in AMP6 Year 2. Informing customers is crucial, whilst reducing pollution in the River Thames is a key factor for driving support of the TTT.

5 The proposed bill increase is deemed acceptable by 70%

This is a marginal decline since last year and has been driven by a significant increase in combined customers finding it unacceptable (29% vs. 22%).

6 70% continue to find the proposed bill increase affordable

There has been a significant increase in the number of non-household customers outside London finding the bill increase affordable versus last year (78% vs. 66%); but there has also been a significant increase in the proportion of non household customers in London finding it unaffordable (27% vs 20%).





# Customer Understanding of the Thames Tideway Tunnel

Consolidated Reporting: Household and Non-household

April 2019