



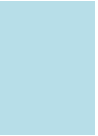




Consumer Panel Barometer – Wave 6 Report

Small Company Premium and Long-Term Delivery Plan

September 2023



Photo by Nick Fewings on Unsplash

-  The majority of customers believe there are benefits of having a small, locally based water company reflected in better customer service and response to problems. However, customers are less likely to associate social value, innovation, or local benefits with smaller company size.
-  There is widespread support for 2025-30 bills to carry a small company premium. 76% accept £1.61 with 88% accepting £1.08p. Customers see this as a small price to pay for a company offering good service – and in the context of the planned improvements costed in the PR24 business plan.
-  The alternative, merging with a larger company to negate the need for a SCP, is very unpopular and customers think will result in a poorer experience.
-  Around 20% of customers are finding water and sewerage bills unaffordable, with 12% saying this about water charges specifically. Affordability is at its lowest point since the barometer started signalling the continued pressure on household finances.
-  While the majority of customers accept smart meters in the Long Term Delivery Plan, there are concerns that the emphasis on leakage reduction is being down weighted in favour of smart meters – and question the speed of leakage reduction even when smart meters are in the plan. A significant minority prefer the plan without smart meters despite the impact on using e.g. drought permits and water transfers.



Sample & Methodology: overview

Combined report including wave 6 of the customer barometer, wave 2 of the student barometer and wave 5 of the Customer Advisory Panel

Student Barometer (quantitative)



- **Wave 2** of the student barometer took place between **8th and 21st August 2023**.
- A total of **45** Student panellists took part.

Customer Barometer (quantitative)



- **Wave 6** of the customer barometer took place between **8th and 21st August 2023**.
- A total of **557** Water Talk panellists took part.
- All were Portsmouth Water **bill payers**.
- Average time for completion was **6 minutes**.

Customer Advisory panel (Qualitative)



- **Wave 5** of the Customer Advisory Panel took place between **2nd and 11th August 2023**.
- A total of **21** panellists took part.
- All have participated in 4 previous rounds of research and can therefore be considered 'informed' respondents.
 - This was particularly useful in discussing a high-level description of the Long Term Delivery Plan which would otherwise have required a more deliberative-style research approach



The qualitative and quantitative approaches shared the same objectives concerning the Company Specific Premium on Borrowing Cost – with an additional objective about the LTDP in the qualitative work

Barometer (quantitative)



- To monitor water bill affordability.
- Small company premium:
 - To establish the perceived advantages and disadvantages of being served by a small (water) company.
 - To establish level of support for small company premium at different levels.
 - To measure views on small company premium ending.

Customer Advisory panel (Qualitative)



- To understand customers' perceptions of PW and views on PW's small/local company status.
- To establish level of support for Company Specific Premium on Borrowing Cost.
- To explore customer views on Long Term Delivery Strategy .

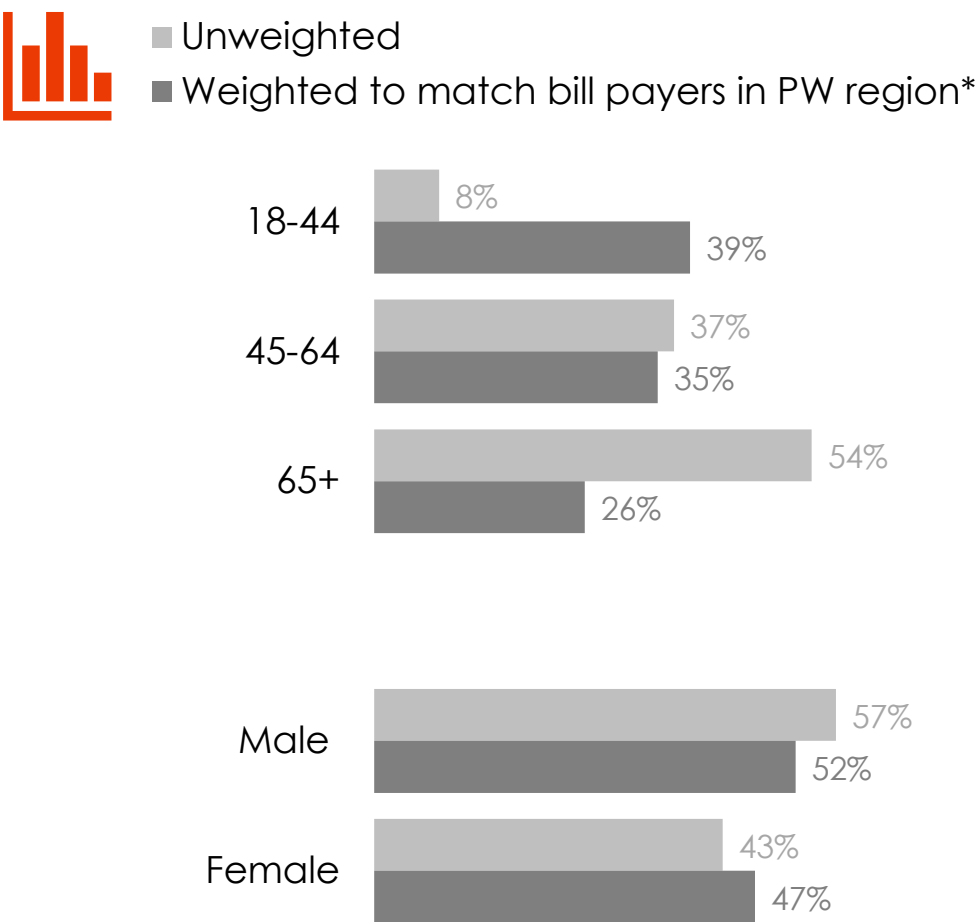
Throughout this report:

- insights from the quantitative research are signposted by
- insights from the qualitative research are signposted by
- specific insights from the student panel are signposted by



The data contained in this report is from customers who have joined Water Talk, the Portsmouth Water Customer Panel.

- The total number of responses (557) is robust for quantitative analysis (i.e. using percentages and comparing sub-groups).
- The data in this report is **weighted** to match the known demographic profile of Portsmouth Water customers (age & gender).
 - This is to compensate for the over-representation of older and male customers on the panel.
- It is important to note that the panel is self-selecting, rather than purposively sampled to be representative.
 - This means panellists may be more engaged with the water sector & knowledgeable about Portsmouth Water than customers in general.
 - Interpretation of the data must bear this in mind. It should be used in conjunction with other data sources to understand different viewpoints and the wider picture.



* Based on 2011 Census data for the 18+ population of the Portsmouth Water region and nationwide omnibus data on water bill payers

Full breakdown of sample

77. Portsmouth Water_Barometer Wave 6_Report_V1.0 incorporating Customer Advisory Panel - report 5

The sample is made up of **household** customers who are **bill payers** and includes customers from a **full range of demographic groups** and those displaying **financial and non-financial indicators of vulnerability**. Sample sizes of key customer groups are detailed below:

		Unweighted total (actual number)	Weighted total
TOTAL (Household bill payers)	Total	557	557
Gender	Male	321	286
	Female	230	265
Age band	18-44	46	217
	45-64	207	195
	65+	304	145
Social grade	AB	298	291
	C1	122	143
	C2	44	48
	DE	53	38
	Not stated	40	37
Indicators of vulnerability?	Any vulnerability	152	140
	No vulnerability	405	417
Total water and sewerage charges affordable?	Agree	349	332
	Neutral / don't know	106	109
	Disagree	101	111
Household size (number of people)	<i>This question was not asked in Wave 6</i>		

Full breakdown of sample

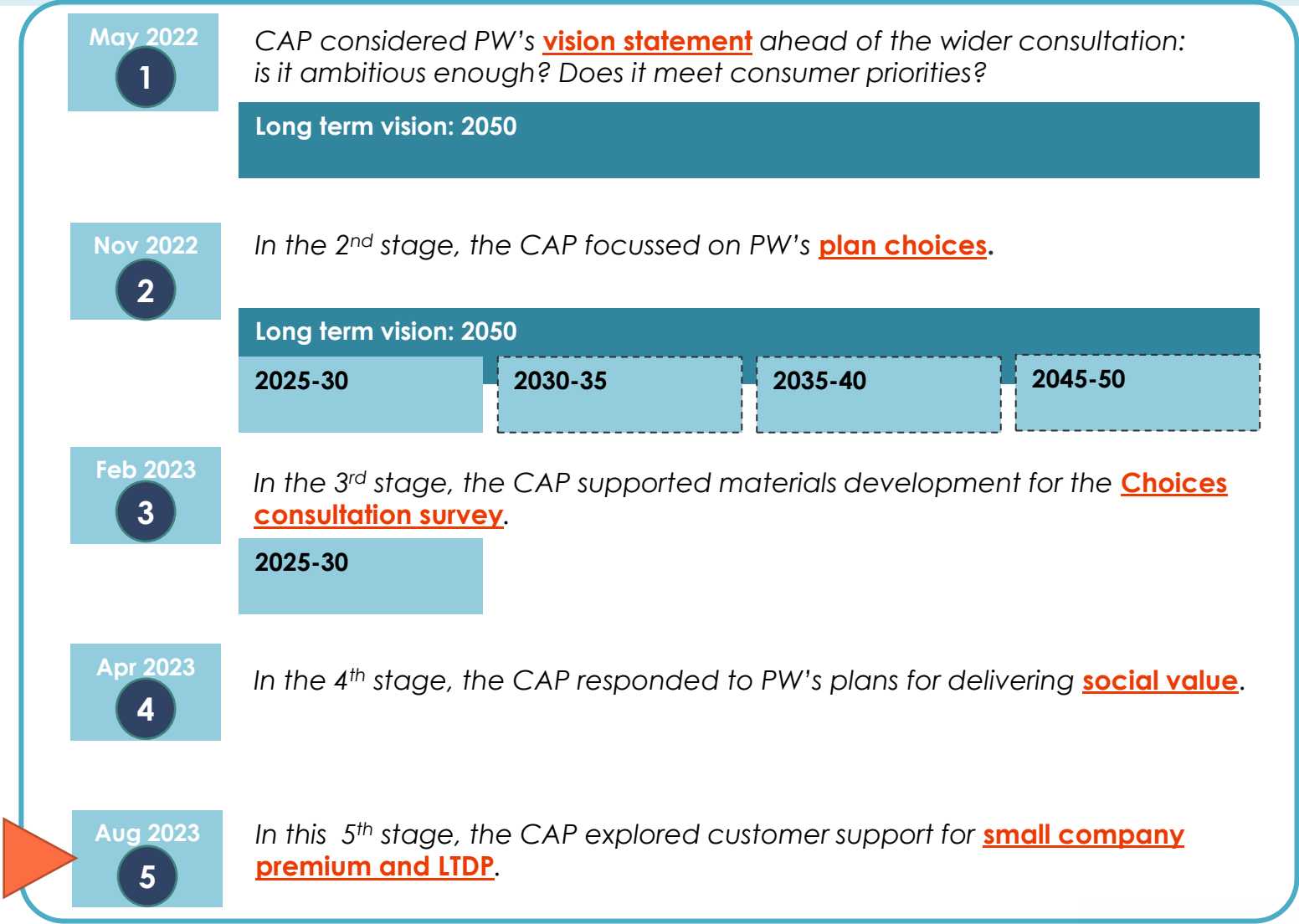
77. Portsmouth Water_Barometer Wave 6_Report_V1.0 incorporating Customer Advisory Panel - report 5


The sample is made up of **students**, most of whom had some responsibility for their water bill. The data was not weighted. Sample sizes of key customer groups are detailed below:

		Unweighted total (actual number)
TOTAL (Students)	Total	45
Gender	Male	24
	Female	19
Age band	18-21	17
	22+	28
Social grade	<i>Students were not asked this question</i>	
Indicators of vulnerability?	<i>Students were not asking this question</i>	
Total water and sewerage charges affordable?	Agree	14
	Neutral / don't know	4
	Disagree	1
Household size (number of people)	<i>Students were not asked this question</i>	

The Customer Advisory Panel (CAP) is designed to be an (increasingly) ‘expert’ citizen sample of Portsmouth Water’s (PW’s) customers and future customers.

Household sample: 4 x 90-minute focus groups	
ABC1	1 group x 5 respondents
C2DE	1 group x 5 respondents
Future customers	1 group x 4 respondents
Vulnerable customers	1 group x 4 respondents
Non-household sample: 60-minute depth interviews	
NHH	3 respondents



An aerial photograph of a wide, pebbly beach meeting the ocean. The beach is composed of reddish-brown pebbles. Three people are walking on the beach near the water's edge. The ocean has greenish-blue water with white foam from the waves washing onto the shore.

Perceived advantages and disadvantages of being served by a small company



BLUE MARBLE

The CAP see Portsmouth Water very positively and think it is a good company, particularly compared to other water companies and the negative publicity they've recently received.

However, their views of the company are influenced by their time on the panel and informed by exposure to information on e.g. Portsmouth Water's social purpose.



- **Most report positive experiences from being on the CAP, having seen that Portsmouth Water do want to do good.**

- Aware of Portsmouth Water being one of the lowest charging water companies and recognise its local focus.
- Recognise Portsmouth Water's efforts in striving to go above and beyond government requirements (from the plan options research).
- Seen as not 'just a water provider' – its work also has environmental and social benefits.
- Many comment that the CAP has allowed them to understand the wider picture of what Portsmouth Water does, and to learn about the innovations they want to put in place.
- Some vulnerable customers expressed conflicting feelings over the last few sessions because some plans have been concerning (e.g. bill increases and smart meters).

*"You turn the tap on and water comes out. We don't have any issues with leaks here. We don't have any issues with billing. So yeah, I would say that it just works never had any real issues."
(NHH customer)*

*"I'm surprised that they're taking notice of what we've said, and as the panel has progressed the things we have talked about are based on the previous session, so they do seem to listen to what we say."
(HH customer, C2D)*





2



	Water only	Water and sewerage	Water only	Water and sewerage
Number of customers	740,000	2.6 million	2.2 million	15 million
Number of staff	262	2,092	950	7,086
Revenue	£45.4m	£823m	£250m	£2.1bn



Portsmouth Water is the smallest of the 20 water companies operating in England.
It serves the region around Portsmouth including Portsmouth, Gosport, Fareham, Havant, Chichester and Bognor Regis – as well as rural parts of south east Hampshire and West Sussex.

"I'm guessing what we have here is cheaper or better value than South East water, only in the sense that all the other numbers factor up, but the revenue is a lot smaller for Portsmouth relative to South East." (HH customer, economically vulnerable)

- The CAP note Portsmouth Water's different staff-to-customer ratio relative to Southern Water and Thames water, who are serving larger populations.
- Interpretation of the information tends to reflect positively on Portsmouth Water:
 - Portsmouth Water manage with a much lower revenue, "punching well above its weight"
 - It's smaller in size, number of staff, and revenue associated with positive experiences, quick and personal customer service and good value for money from the company.

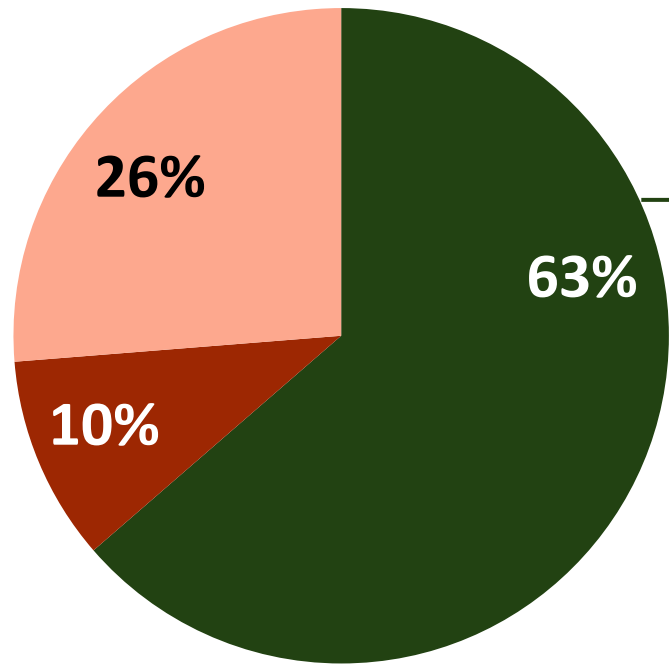


This is also reflected in the survey where almost two thirds of panelists agree there are advantages to being served by a smaller company.

Younger people appear less convinced by the advantages of a smaller company, perhaps having less of a connection with local businesses. The C2 social grade are notable in seeing the advantages (despite small base size it is a significant difference with other social grades).

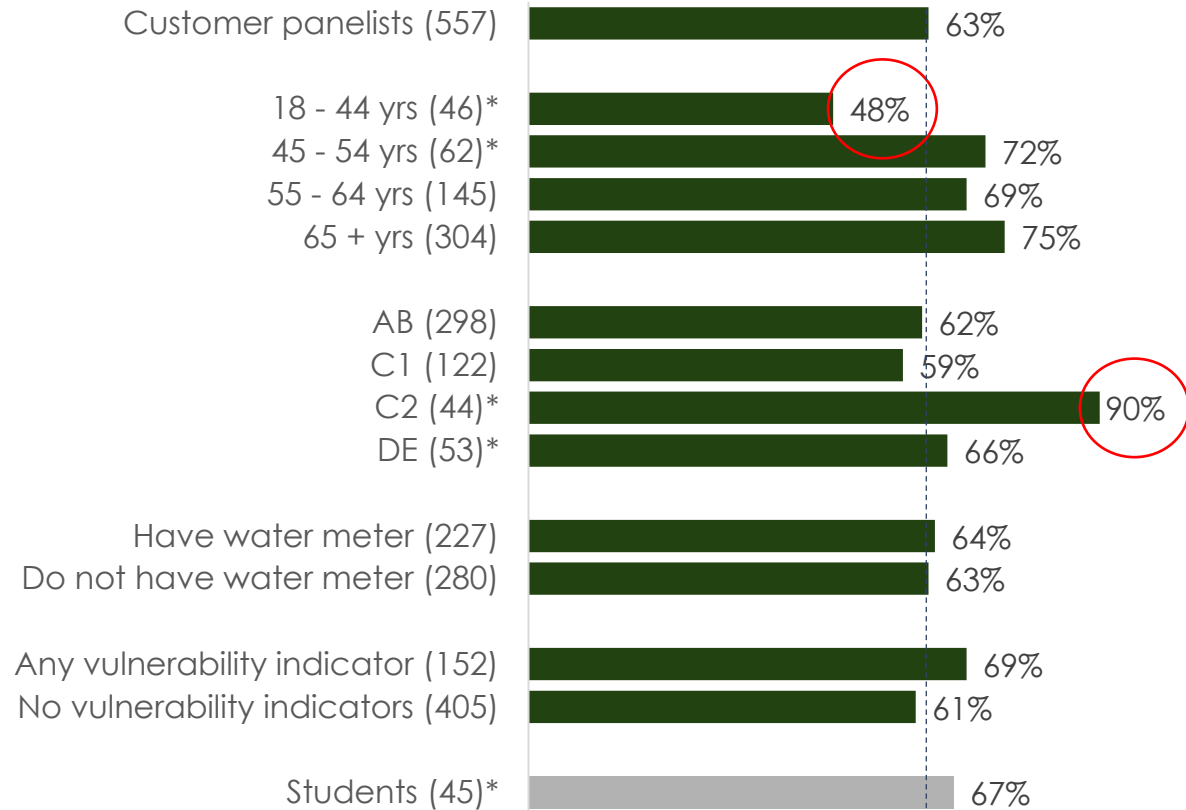


Perceived advantages to being served by smaller company



■ Yes ■ No ■ Not sure

% of different customer groups who agree there are advantages to being served by a smaller company



Note: truncated axis



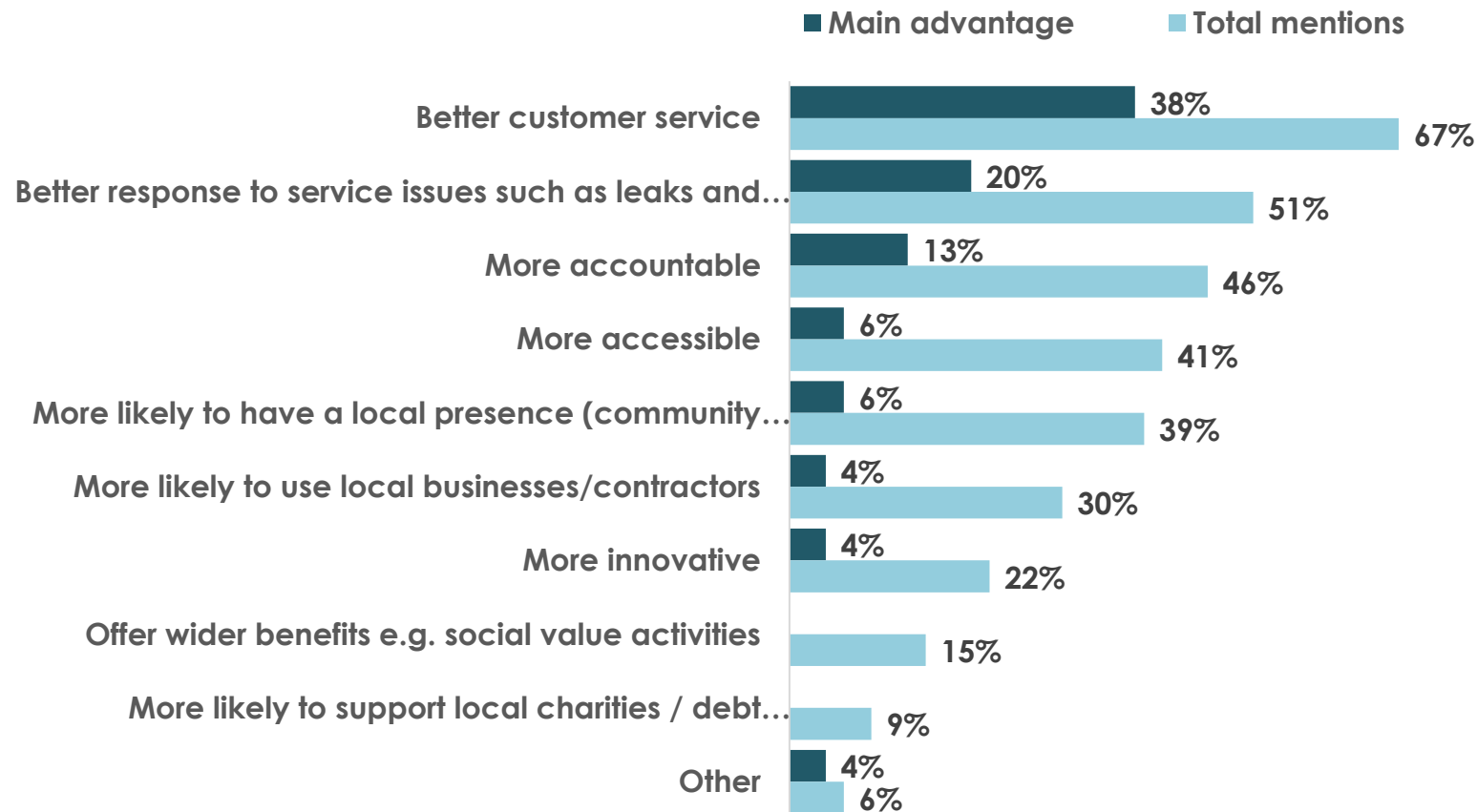
BLUE MARBLE

Better customer service and better response to leaks and bursts are the main advantages.

- Though smaller companies are associated with better service, responsiveness, and accountability, customers are less likely to associate social value, innovation, or local benefits with smaller company size.
- Students specifically are less likely to think smaller companies provide better service.



Advantages to being served by smaller company



"I think you feel that you can actually get in contact with them should you ever need to."
(Future customer)

"I think the smaller companies, they're potentially able to manage change more quickly... with fewer customers then, theoretically, if you're going to change all the lead pipes, they'd be able to do it much quicker and more efficiently than a company that's got 2.6 million customers. So theoretically they could lead the field in any innovation or changes."
(HH customer, BC1)





There is a sense that Portsmouth Water is more accessible and personable in its interactions with customers, while being more likely to prioritise local areas for its plans compared to a bigger company. It should also be able to be more flexible and move quicker.

SMALL

Most customers express a clear preference for being served by a small water company, noting several benefits:

- ✓ Associated with better quality service.
- ✓ Consensus that smaller companies lead to quicker response times and faster issue resolution.
- ✓ Linked to more personal customer service – less risk of getting routed to call centres and fewer people waiting to get through.
- ✓ Portsmouth Water is seen as more accountable and involved in local environmental and socio-economic issues, simply due to its size covering a smaller service area.

However, the size of the company does not matter to everyone, as long as the service standard is good (clean water, good pressure, good customer service) and bills are kept low.

LOCAL

Similarly, customers express a preference for being served by a local water company – size is not the only issue.

- ✓ Being local fosters a stronger connection between company and customers.
- ✓ Local employees believed to have more local knowledge: their response to issues will be faster and they are better placed to understand local problems.
- ✓ Customers anticipate personalised customer service due to the employees' familiarity with local residents and the area.
- ✓ A local company is seen as more likely to put stronger focus on the local community and the environment, while supporting local businesses and charities.

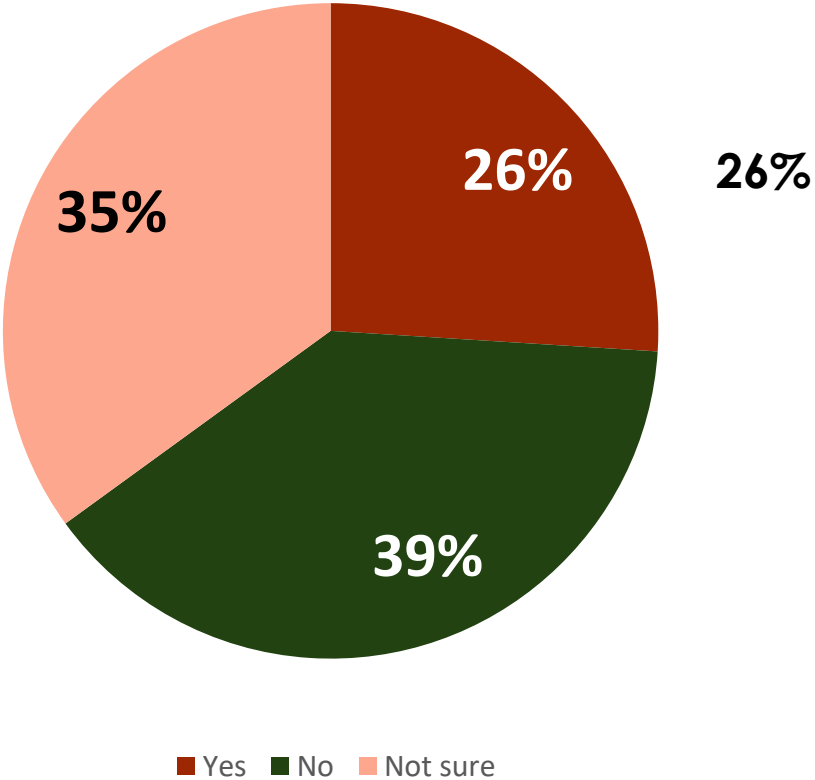


Only a quarter feel there are disadvantages to being served by a smaller company, but this is more pronounced with younger/student segments.

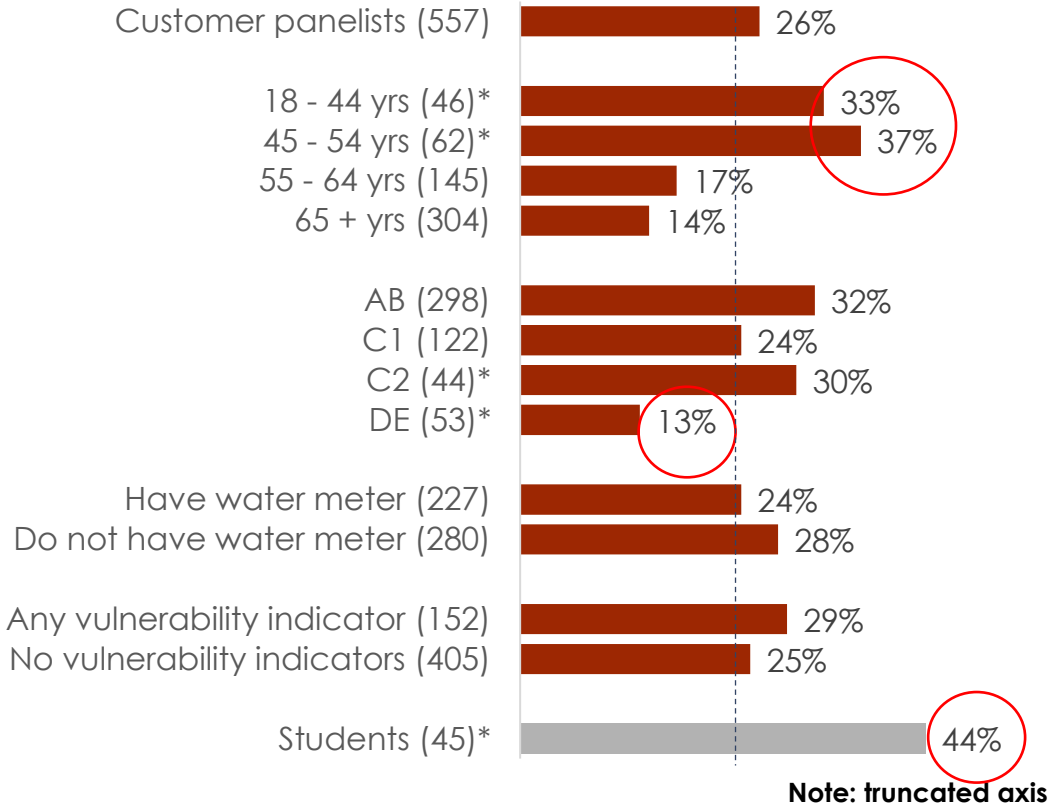
Under 55s were more likely to think that being served by a smaller company comes with disadvantages than those aged 55+. Those in the DE social grade are less likely to say there are disadvantages than other social grades.



Perceived disadvantages of being served by smaller company



% of different customer groups who agree there are disadvantages to being served by a smaller company



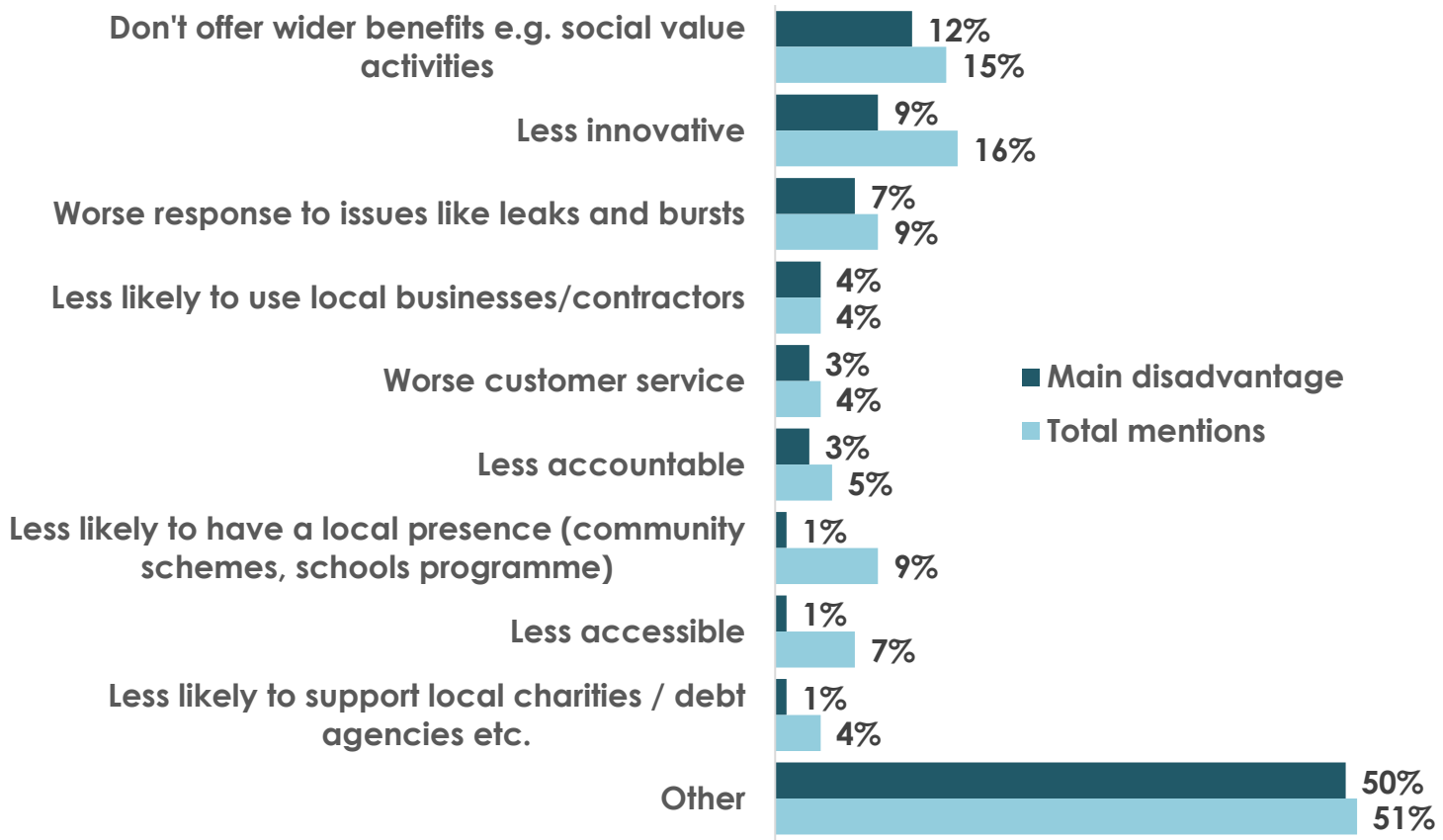
Q5a. Do you think there are any disadvantages to being served by a smaller company? Base: All customer panellists (557), all students (45). * denotes CAUTION low base size



Qualitatively, panellists also speculate that Portsmouth Water might have less purchasing power than bigger companies - and might be less resilient to crises.



Disadvantages of being served by smaller company



Students are less likely to think smaller companies are socially responsible:



30% say a lack of wider benefits and social value activities is the main disadvantage of smaller companies.

A minority felt the size of the company did not matter - big or small - as long as service standards were good (clean water, good pressure, good customer service) and bills were kept low.



Other answers include a range of comments around finances: lack of funds coming in, fewer economies of scale, less purchasing power. Also: less manpower to deal with issues.



Support for Small Company Premium

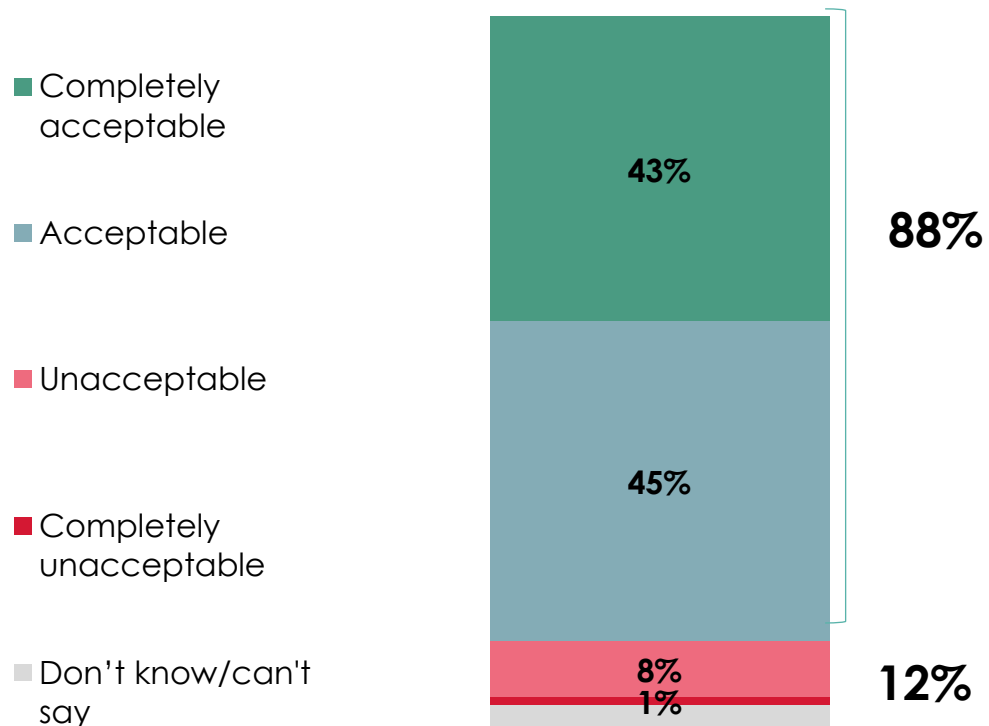


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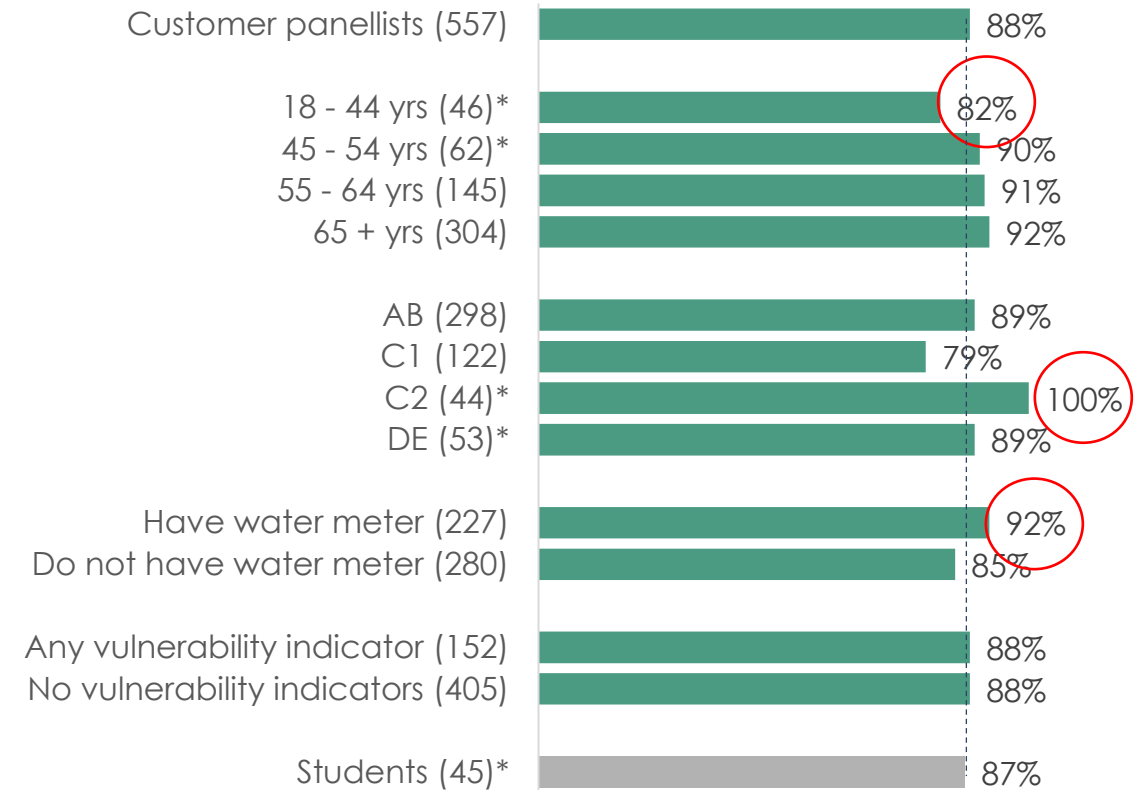
Those aged 45+ and metered customers are more likely to find the £1.08 premium acceptable than their counterparts.



Support small company premium at £1.08 per annum



% of different customer groups who show support for the £1.08 premium



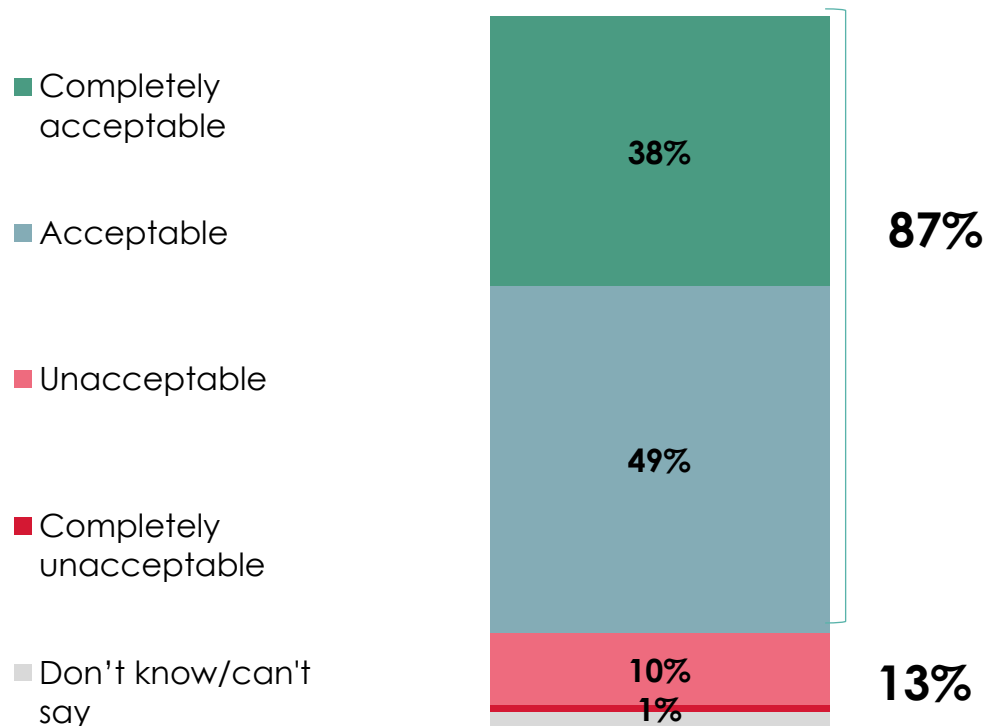
Note: truncated axis



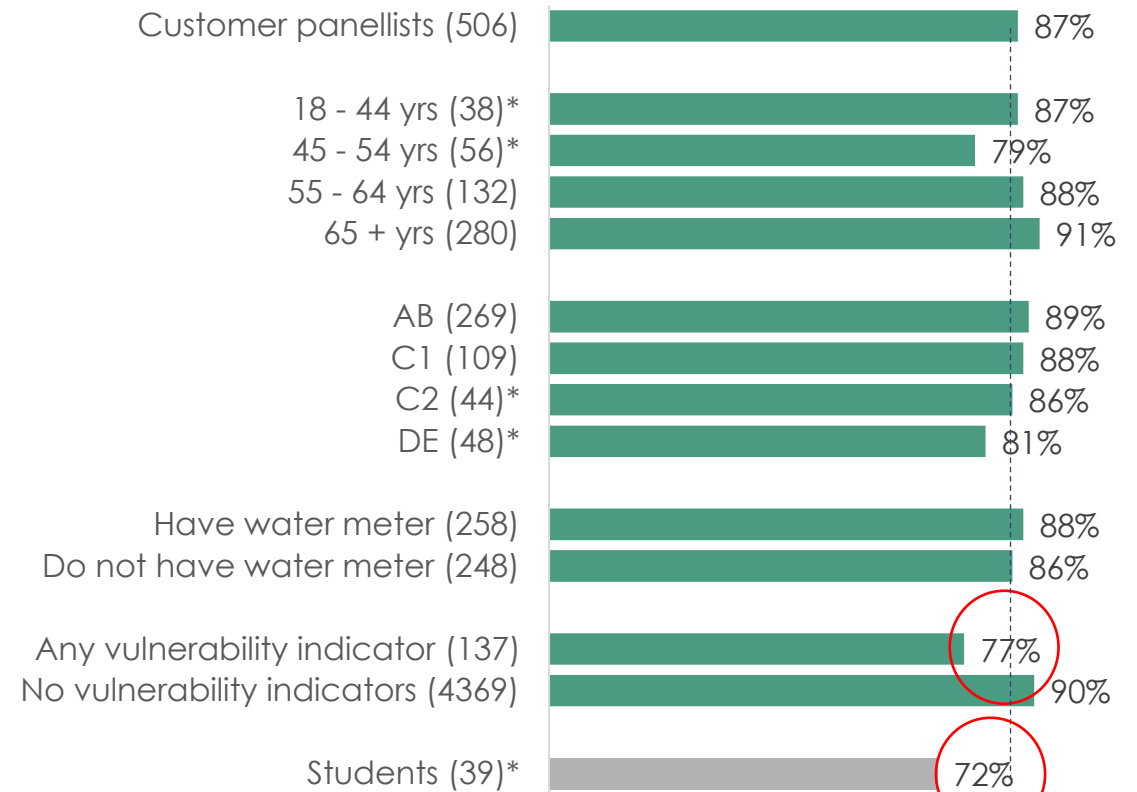
And support remains strong for the small company premium at £1.61 per annum – 87% (of those that were supportive at £1.08) remain supportive.

Students are less likely to support the slightly higher rate. Customers without any vulnerability indicators were more likely to find the £1.61 premium acceptable, compared to vulnerable respondents.

Support small company premium at £1.61 per annum



% of different customer groups who support the £1.61 premium (of those that support the £1.08 rate)



Note: truncated axis

Q6b And what if the small company premium would add £1.61 per year to an average water bill. How acceptable would that figure be?

Base: All customer panellists who support small company premium at £1.08 (506), all students who support small company premium at £1.08. * denotes

CAUTION low base size



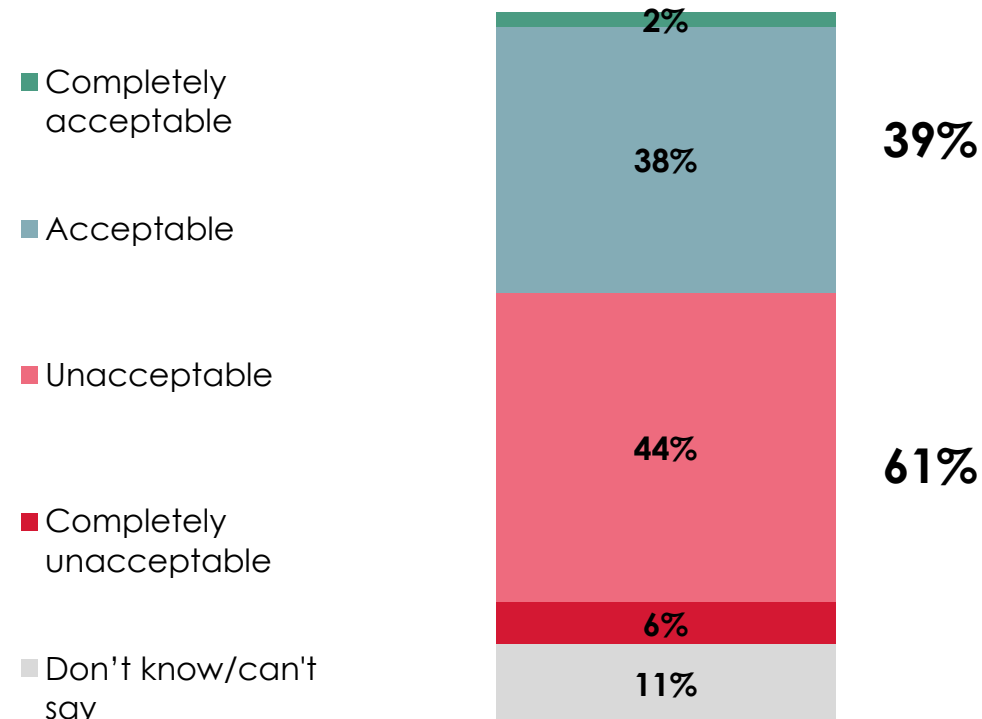
BLUE MARBLE

Among those who did not support the £1.08 uplift, support is also weak for a smaller uplift of £0.54 – a majority appear to reject the concept of a small company premium.

A majority within this group is made up of 18–44 year-olds, and most of them reject the £0.54 uplift. Base sizes for sub-groups, however, are too small for robust analysis.



Support small company premium at £0.54 per annum



Note: truncated axis

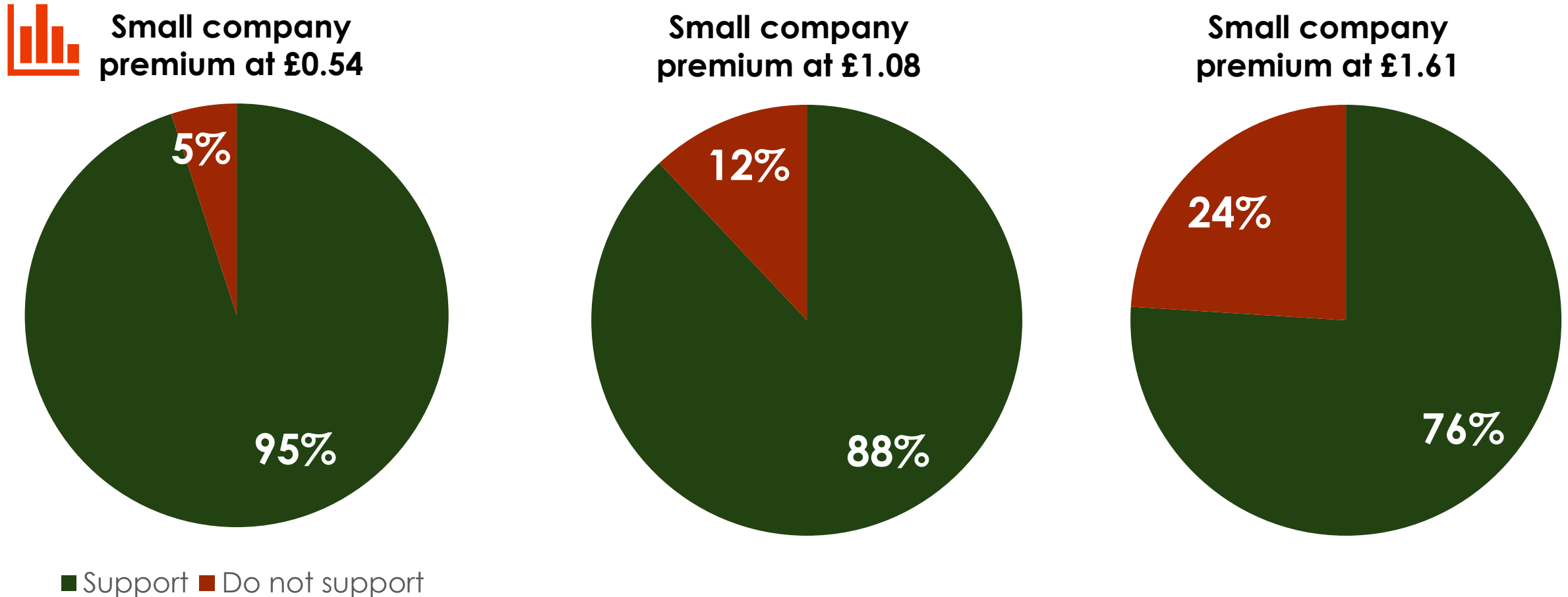
Q6c And what if the small company premium would add £0.54 per year to an average water bill. How acceptable would that figure be?
Base: All customer panellists who did not support small company premium at £1.08 (51) **Caution: low base size**



BLUE MARBLE

Support is strong across the board – 76% of panelists support the small company premium uplift ²¹ at £1.61 per annum.

Metered customers, and those without any vulnerability indicators, are more likely to find the £1.61 rate acceptable than unmetered and vulnerable customers.



Q6a-c Support for each level Base: All customer panellists (557)

In calculating support at each level we have assumed that all who support at £1.08 also support at £0.54 – and those who do not support at £1.08 are assumed to also not support at £1.61



Current premium seen as acceptable in light of positive perceptions of Portsmouth Water and service experience.



Having seen a summary of the 2025-30 business plan, a premium of £1.61 per annum doesn't feel particularly high to the majority.

- This cost is justified as Portsmouth Water's service has been good and their bills are still lower than other companies.
- This amount does not impact the value for money delivered by the company.



A minority of customers (mostly economically vulnerable) don't accept the premium at any level

- These are against smart meters in the plan and don't want to support any bill increase that includes smart meters.
- They are particularly 'horrified' with the cost of implementation (£70M), compared to lead pipes (£5M) or improving the environment (£2M).

Is the small company premium fair?

- Prevailing view that 'this is how the world works'
- Even clearer for NHH customers who are faced with similar issues as part of running their businesses.

"It's not fair, but it is what it is, there's no way round that for Portsmouth water to change that really so you know you just have to accept it."
(HH customer, vulnerable)

"I think it's a necessary evil, in order to maintain the system provide the service that they're obviously very good at, given the customer satisfaction service, I think that they have to maintain the system and keep improving, and to do that, if they have to borrow money, then that's a necessary evil of doing that."
(NHH customer)

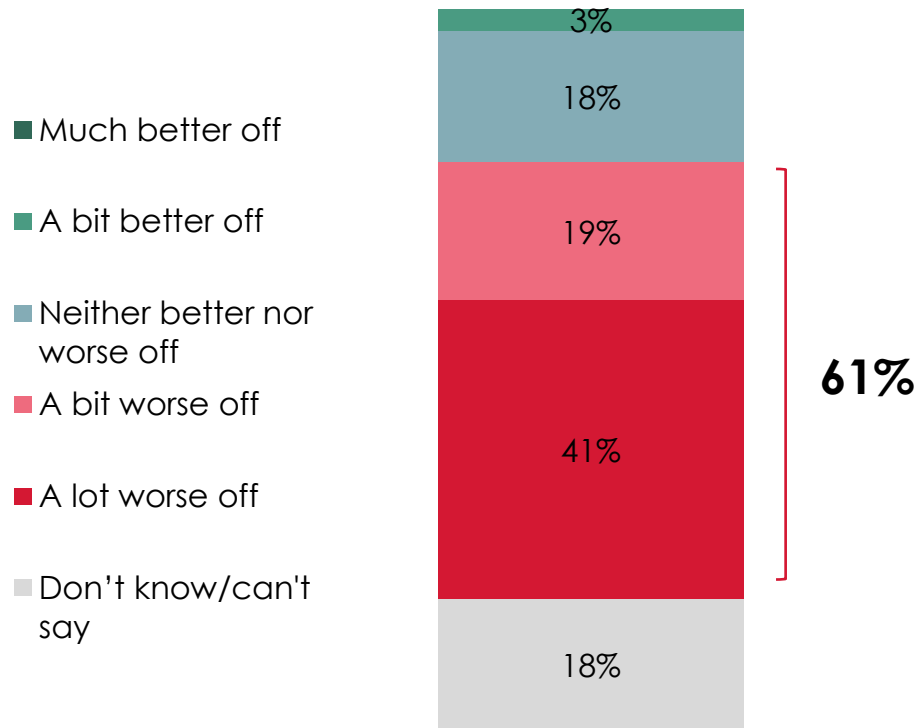


3 in 5 customers, but only a quarter of students, think they would be worse off if the small company premium was removed due to a merger or acquisition of Portsmouth Water.

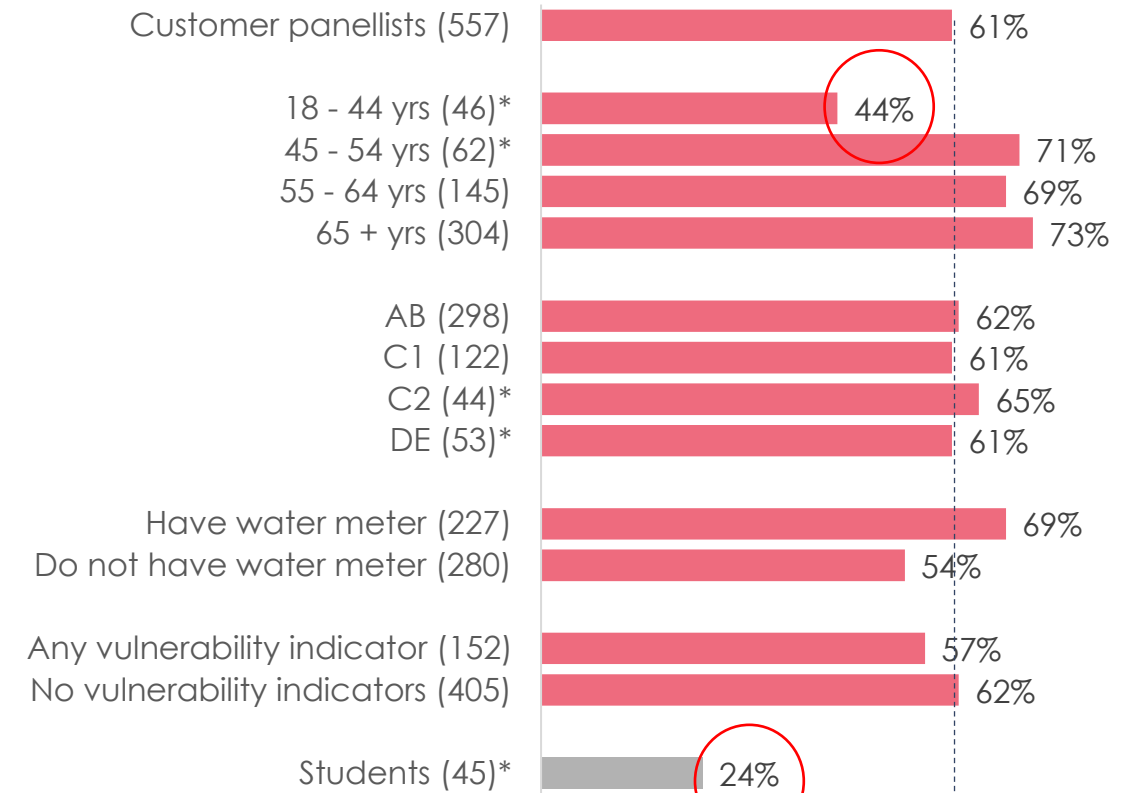
Only 3% of customers overall think they would be a bit better off. However, students and younger customers are much less likely to say they would be worse off under a larger company.



Better or worse off if Portsmouth Water merged with a larger company?



% of different customer groups who think they would be worse off



Note: truncated axis

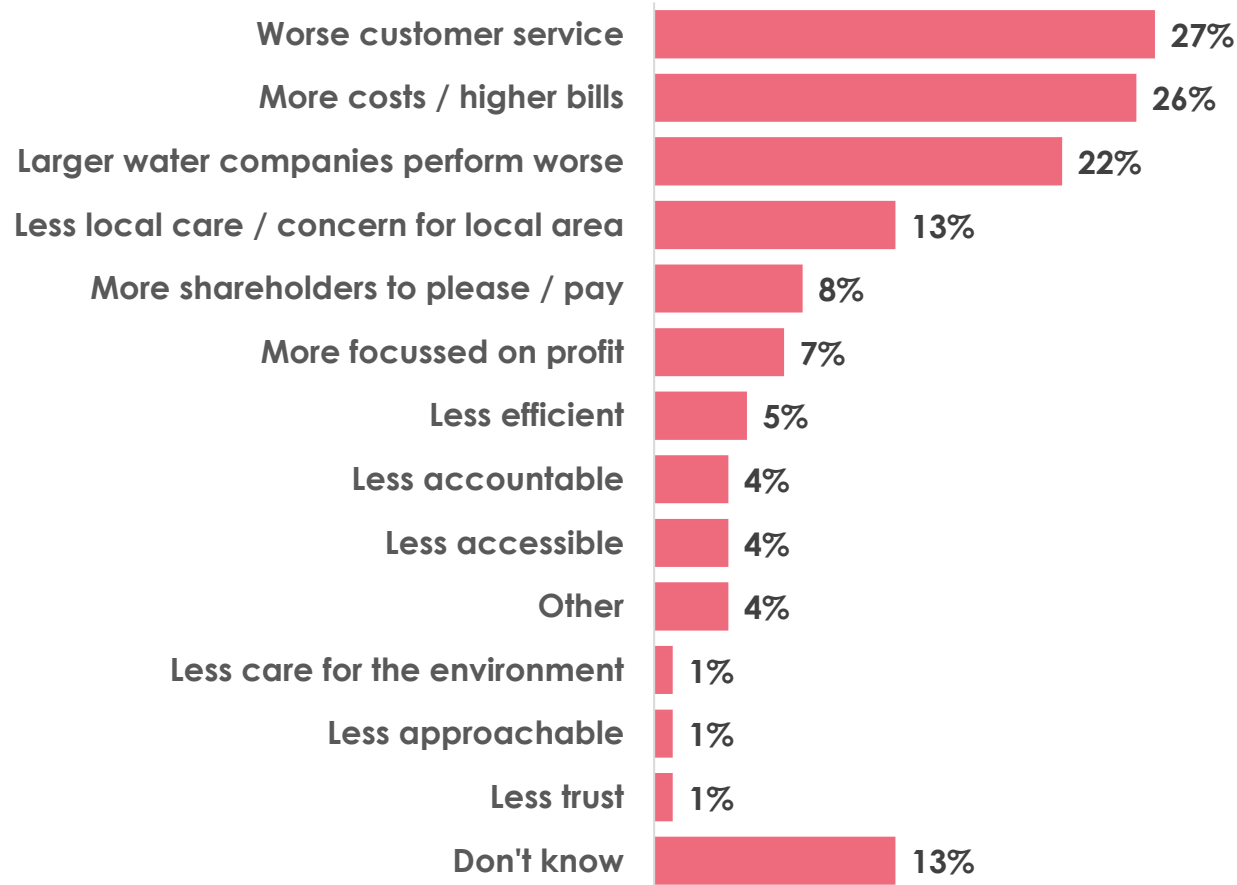
Q7a If this small company premium was removed from bills through, for example, Portsmouth Water being merged or taken over by a larger company do you think you would end up better off or worse off?. Base: All customer panellists (557), all students (45).




BLUE MARBLE



Why do you think you'd be worse off if Portsmouth Water merged with a larger company?



- 
- **The idea of merging with an international company received great levels of pushback.**
 - Merging or takeover is perceived as an extreme scenario, which feels concerning to some – they can't see why something like this would need to happen.
 - International companies are perceived as less empathetic and potentially lacking personality.
 - Concerns exist around accountability and dedication to UK-based customers.
 - **A couple also point out that Portsmouth Water should distance itself from Southern Water** and its negative reputation – they wouldn't be happy for Portsmouth Water to merge with Southern Water.

Q7c Why do you say you would be worse off? Base: Customer panellists who say they would be worse off if small company premium was removed from bills (387)





Affordability



BLUE MARBLE

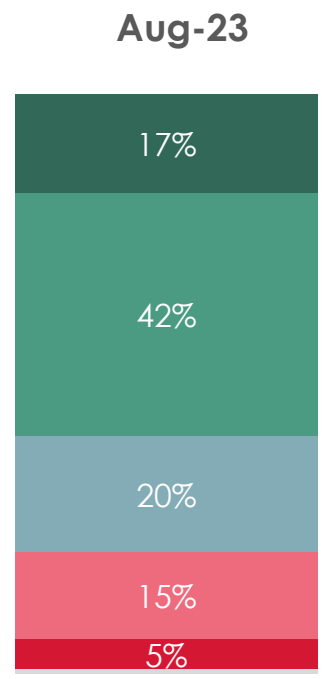
3 in 5 respondents agree that their total water and sewerage charges are affordable, while 1 in 5 disagree.

The percentage of those who find charges affordable has decreased by 16 points since January 2023, and is the lowest percentage since March 2022.



How much do you agree or disagree that your total water and sewerage charges are affordable?

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

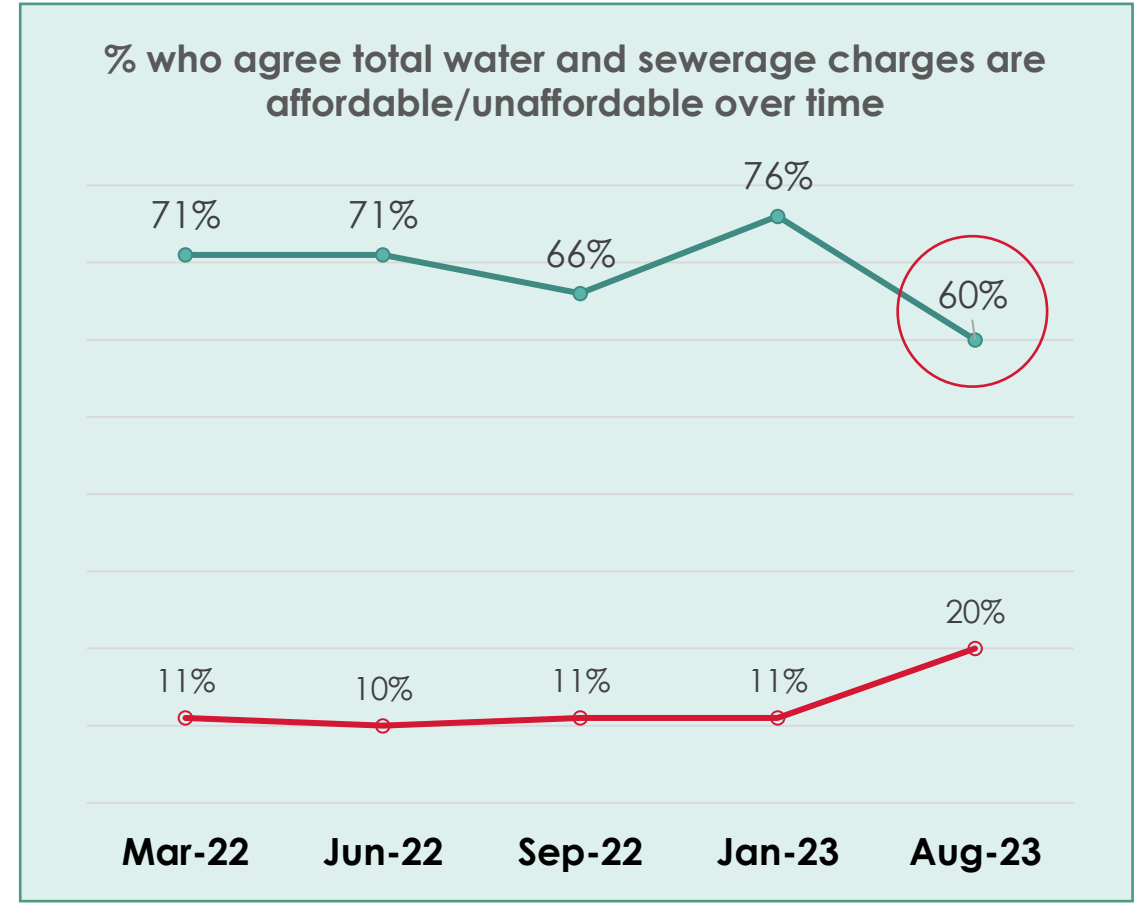


60% say charges are 'affordable'

20% say charges are 'unaffordable'

Total (557)

Total **water and sewerage** charges



Less than a third of students find their combined water and sewerage charges affordable – around half of the average percentage.

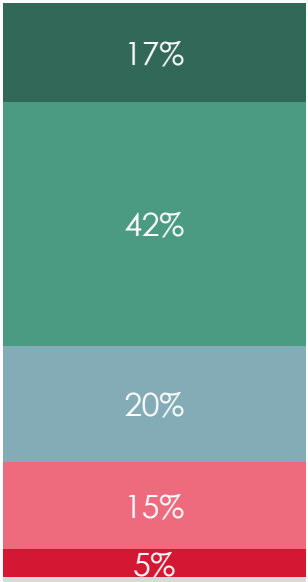
Metered customers and those in a higher social grade are more likely to say the charges are affordable.



Total water and sewerage charges affordable?

Aug-23

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know



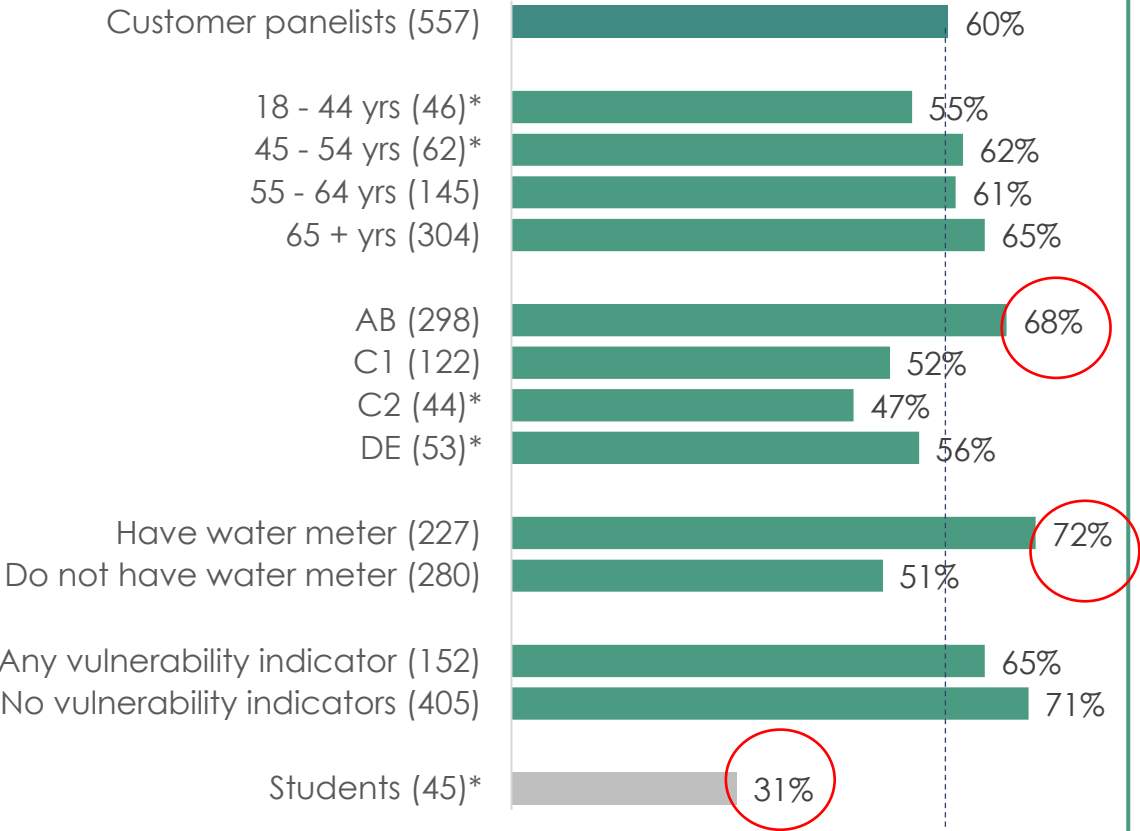
60% agree

20% disagree

Total (557)

Total water and sewerage charges

% of different customer groups who agree that charges are affordable to them



Q1 How much do you agree or disagree that the total water and sewerage charges that you pay are affordable to you?

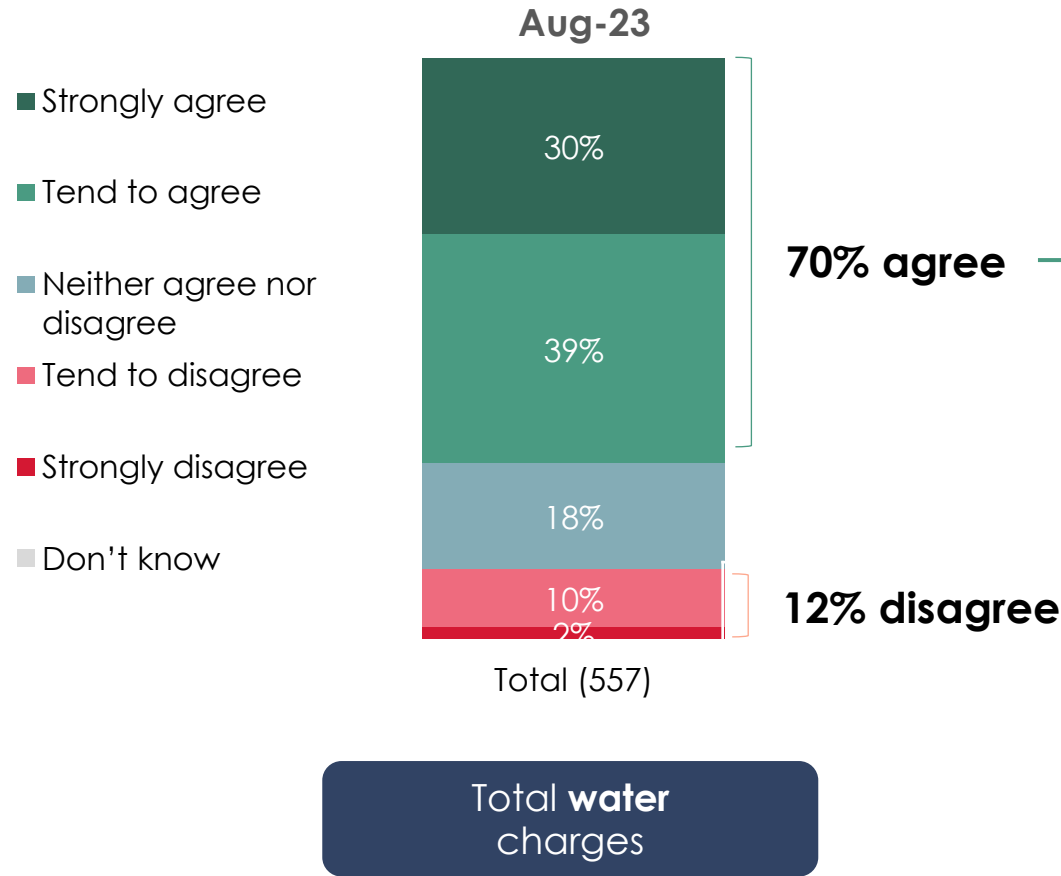
Base: All customer panellists (557), all students (45) * denotes CAUTION low base size

70% agree that their total water charges are affordable – 10 points higher than the proportion who say the same about their combined water and sewerage charges.

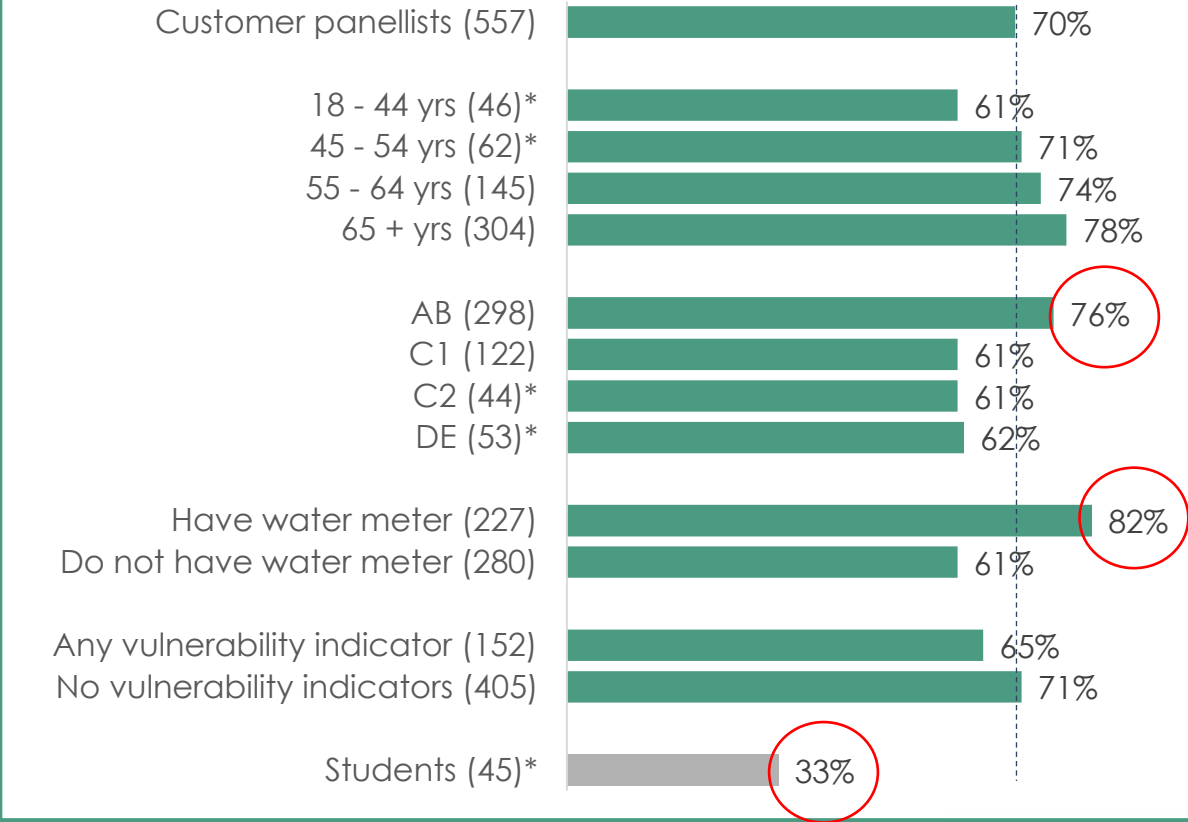
However, a third of students find their water charges affordable. Those in a higher social grade, and metered customers, are significantly more likely to find their water charges affordable.



How much do you agree or disagree that your total water charges are affordable?



% of different customer groups who agree that charges are affordable to them



Q1 How much do you agree or disagree that the total water and sewerage charges that you pay are affordable to you?

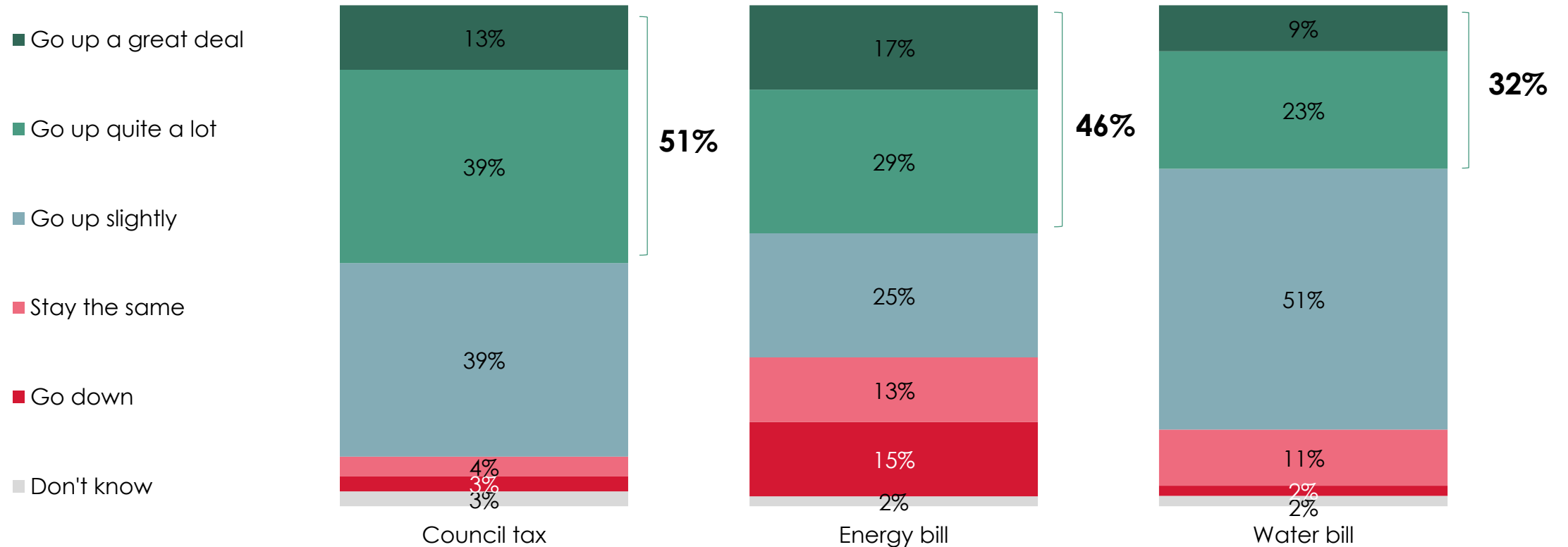
Base: All customer panellists (557), all student (45). * denotes CAUTION low base size

A third of customers are expecting water bills to rise by quite a lot or a great deal over the next year; a further 51% expect them to go up slightly.

Water bills are expected to rise the least compared to council tax and energy bills. Lower income groups are most pessimistic about bill rises.



How much do you expect each of the following bills will change over the next 6-12 months?





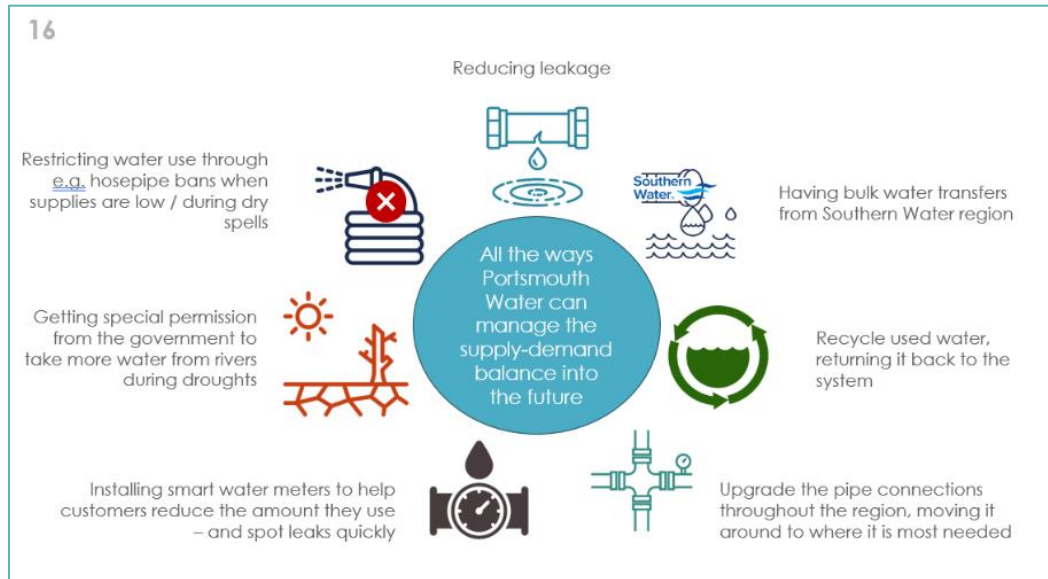
Long Term Delivery Strategy



BLUE MARBLE

Long Term Delivery Strategy

- The Customer Advisory panel were given a recap on the options Portsmouth Water can use to manage the supply-demand balance over the long term. They had discussed these in a previous round of research.
- There was a lot of consistency about the options customer prefer PW to use: a combination of upgrading pipes, reducing leakage and for many, recycling water seems the best combination.



- ✓ Upgrading pipes: likely to be effective in improving efficiency – often linked to leakage reduction.
- ✓ Reducing leakage: righting a problem is often seen as the main priority.
- ✓ Recycling water: provided guarantees about the quality of recycled water.
- ✓ Minority also mention smart meters as a way to reduce leaks.



- Least popular option is drought permits: seen as damaging to the environment and counterproductive.
- Mixed views about bulk transfer of water, some of which relates to low trust in Southern Water.
- Most scepticism about the effectiveness of what are seen as behavioural customer interventions: hosepipe bans and smart meters.

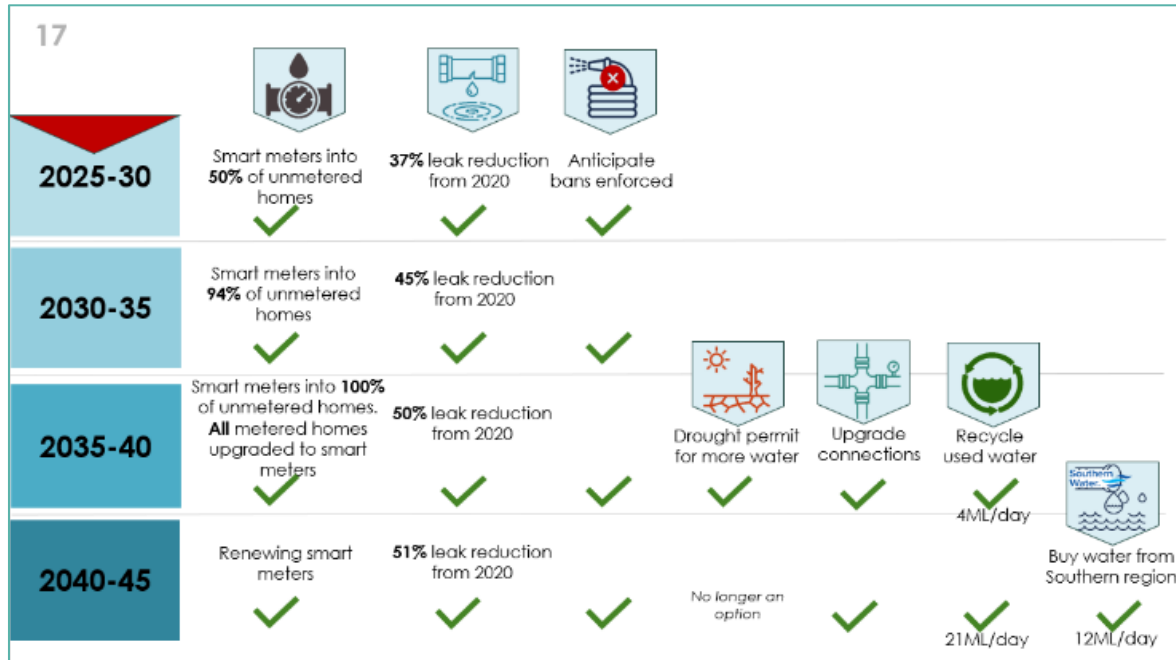
"[Smart meters] I just can't see how this helps customers reduce water." (Future)

"This [drought permits] just doesn't sound like a good idea from an environmental point of view." (NHH)



Long Term Delivery Strategy with smart meter investment

(Smart meter) plan suggests Portsmouth Water putting most focus on smart meters, while potentially under-investing in leakage.



- Customers often do not link smart meters and leak reduction but see as separate initiatives: not clear why smart meters are the main focus of investment while leakage targets look unambitious.
- Many favour water recycling and wonder why this is 15 years away (does it involve building infrastructure?)
- Pleased that drought permit use is limited to 5 years.
- Several question why upgrading connections won't start until 2035?
- The later leak target moving from 50-51% looks poor.
- While some think the targets generally look low – others see as an ambitious plan overall.

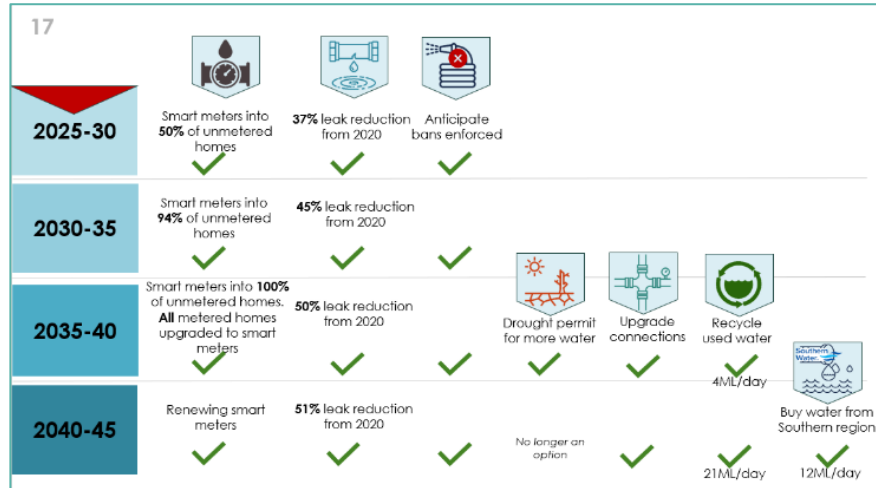
*"Leak reduction should take higher precedence than smart meters."
(HH Customer C2D)*

"Are we saying that 50% is around the best we are going to get? Concerned it's never going to get better than that."(NHH)

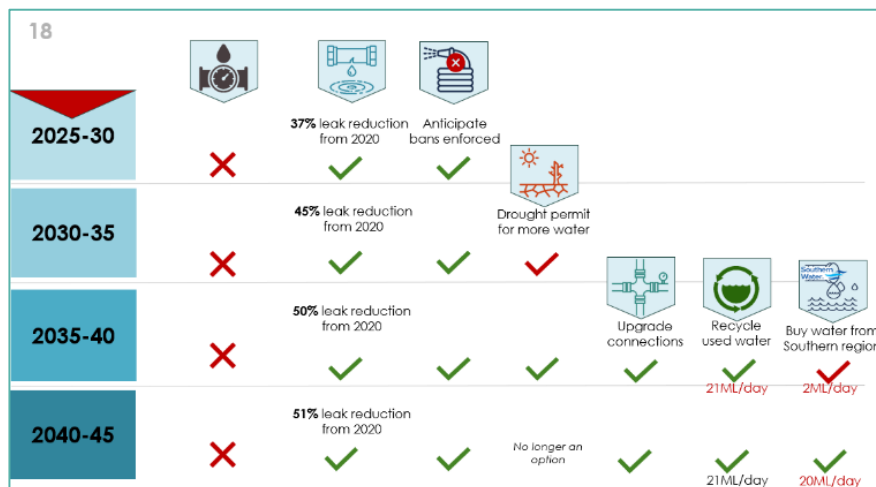


Long Term Delivery Strategy without smart meter investment

Some don't see the logic of smart meters and their advantage to customers – even questioning their potential to spot leaks when this is pointed out.



- Most scepticism about the role of meters comes from future customers and the economically vulnerable groups
 - Question the customer benefit – or rooted in concerns about the impact on their bills/lifestyles
- Other customer segments (BC1C2D) are more accepting of smart meters per se but they also raise issues:
 - Disappointment that without the smart meter investment, more isn't going to be achieved with reducing leakage.
 - Unhappy about the impact of using drought permits sooner.
 - Concerns about earlier bulk water purchases from Southern Water.
 - Feeling that emphasis on smart meters places blame on the public rather than infrastructure.



"What they're trying to do is make us say, oh, well, we must have smart meters, because other things are going to be seriously affected. But they haven't explained at all how smart meters improve it. What one does know is that smart meters will improve it for them." (Future customer)

"I don't understand how it works but they have experts they have done this, they know." (NHH)





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77. Portsmouth Water_Barometer Wave 6_Report_V1.0

Standards for high-quality research:	How addressed in this project:
Useful and contextualised	This customer panel forms part of Portsmouth Water's ongoing research. Panellists were originally recruited via a large invitation mailout to c.40,000 customers, selected at random. An initial registration process served to communicate about the purpose of the panel; explain that surveys would be issued regularly; and cover all permissions for recontact. The barometer surveys were used throughout the PR24 research programme to provide a quantitative read on a range of issues. All participants are sent a newsletter after each survey to highlight key findings and how the research is being used.
Fit for purpose	<ul style="list-style-type: none"> • The barometer surveys were all issued via emails to customers who had registered. • The total number of interviews (557 and 45 from the student barometer) is robust for quantitative analysis (i.e. using percentages and comparing sub-groups) • Survey data was then weighted to match the known demographic profile of Portsmouth Water customers (age & gender) • The panel is self-selecting, rather than purposively sampled to be representative. This means panellists may be more engaged with the water sector & knowledgeable about Portsmouth Water than customers in general. This is borne in mind in the interpretation and triangulation of the data.
Neutrally designed	Blue Marble designed the survey and materials with impartiality. The quantitative survey used balanced answer lists, randomised answer lists and gave options to say 'don't know'.
Inclusive	The barometer surveys reflect a wide range of perspectives by including the views of many hundreds of households and specifically households with vulnerabilities and those who are financially struggling. The invitation to become part of the panel was sent to a random sample of c.40,000 household customers, of which c. 2.5% elected to register. Robust subsamples of a wide range of household customer types and segments were achieved, including younger and older age groups, all social grades and customers with vulnerabilities.
Continual	The barometer panel has and continues to provide Portsmouth Water with an ongoing dialogue with a large sample of PW customers.
Shared in full	Portsmouth Water to publish this report and supporting appendices on its website.
Ethical	Blue Marble is a company partner of the MRS, senior team members are all Members of the MRS and/or SRA. All Blue Marble's employees abide by the MRS Code of Conduct and as such all our research is in line with their ethical standards.
Independently assured	This report assured by Sia Partners



77. Portsmouth Water_Barometer Wave 6_Report_V1.0 incorporating Customer Advisory Panel - report 5

Standards for high-quality research:	How addressed in this project:
Useful and contextualised	The Customer Advisory Panel (CAP) is designed to be an increasingly 'expert' citizen sample of Portsmouth Water's (PW's) customers and future customers. This was the 5 th project for the CAP and was used to consider the small company premium and the Long Term Delivery Plan. For respondents, they were provided with stimulus materials to help understand the question context and in some cases, to help them articulate their preferences.
Fit for purpose	<ul style="list-style-type: none"> • Clear objectives that sat within the wider research and engagement programme agreed at the outset • Purposefully recruited sample to reflect all types of Portsmouth Water customers: across all ages, gender, life stage, socio demographic groups • Sample size proportionate for a longitudinal project involving the same participants over time • Included the views of HH, NHH and Future customers – including customers with financial vulnerabilities (i.e. on low income, who have recently lost their job, living in temporary accommodation); and customers in households with health vulnerabilities (including mental health issues) • Method to reflect the nature of the objectives: reoccurring online groups and depths to allow for open-ended, personal reflections
Neutrally designed	Blue Marble designed research materials including the discussion guides, group activities, stimulus materials and homework tasks. These are all designed with impartiality.
Inclusive	<ul style="list-style-type: none"> • Stimulus produced in plain English – all mediated by a research moderator • Online community method allows people to move at their own speed, with homework exercises allowing for deeper reflection between the online community and deliberative events
Continual	A longitudinal approach with 25 customers that would span the 18-month period providing ongoing customer input to the draft plan.
Shared in full	Portsmouth Water to publish this report and supporting appendices on its website.
Ethical	Blue Marble is a company partner of the MRS, senior team members are all Members of the MRS and/or SRA. All Blue Marble's employees abide by the MRS Code of Conduct and as such all our research is in line with their ethical standards.
Independently assured	This report assured by Sia Partners