

Consumer Panel Barometer – Wave 4 Report

Water Resources Management Plan

February 2023





Method

- **Wave 4** of the consumer panel took place between **13th and 30th January 2023**
- A total of **434** Water Talk panellists took part
- All were Portsmouth Water **bill payers**
- Average time for completion was **11 minutes**

Please note:

- In wave 4, participants were signposted to the full consultation survey for Portsmouth Water's WRMP
- It is likely that some Water Talk members chose to complete the full survey (instead of the Barometer survey)

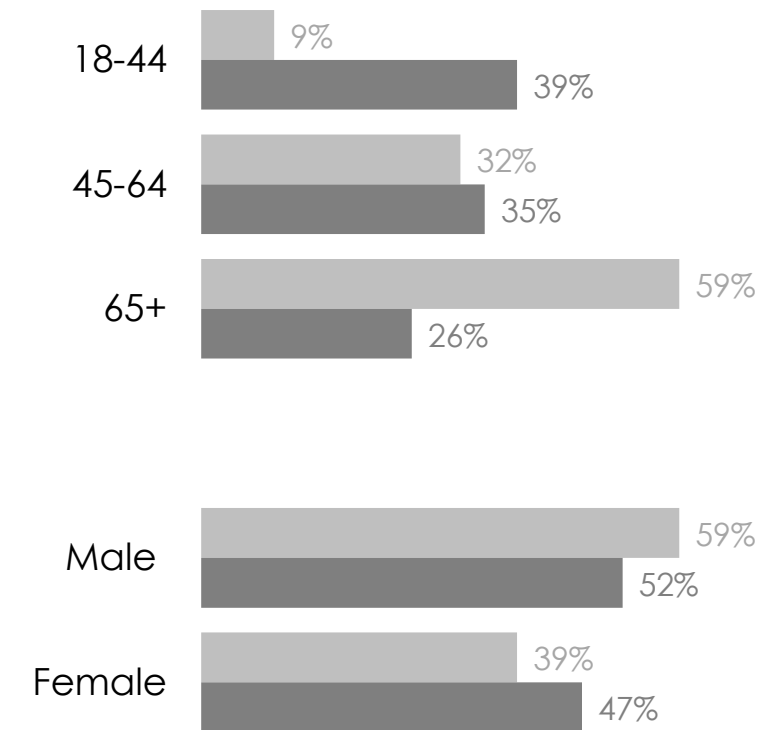
Topic coverage

- Water bill affordability
- Support for different parts of the WRMP
 - Reducing leaks
 - Helping customers save water
 - Installing & using smart water meters
 - Securing more water sources
- Support for overall WRMP
- Support for approach to balancing the different elements of the WRMP (leak reduction vs efficiency vs sources)



- The data contained in this report is from customers who have joined Water Talk, the Portsmouth Water Customer Panel
- The total number of interviews (434) 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.

- Unweighted
- Weighted to match bill payers in PW region*



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



63. Portsmouth Water_Barometer Wave 4_Report_V2.0

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	434	434
Gender	Male	259	224
	Female	171	206
Age band	18-44	37	169
	45-64	141	152
	65+	256	113
Social grade	AB	228	205
	C1	81	95
	C2	43	51
	DE	44	34
	Not stated	38	49
Indicators of vulnerability?	Any vulnerability	132	130
	No vulnerability	302	304
Total water and sewerage charges affordable?	Agree	321	332
	Neutral / don't know	71	56
	Disagree	42	46
Household size (number of people)	1	131	107
	2	221	172
	3+	81	154



SAFE, RELIABLE DRINKING WATER FOR THE NEXT 50 YEARS

HAVE YOUR SAY ON OUR DRAFT WATER RESOURCES
MANAGEMENT PLAN 2025-2075

CONSULTATION: NOVEMBER 15, 2022 TO FEBRUARY 20, 2023



Support for WRMP
and separate
elements



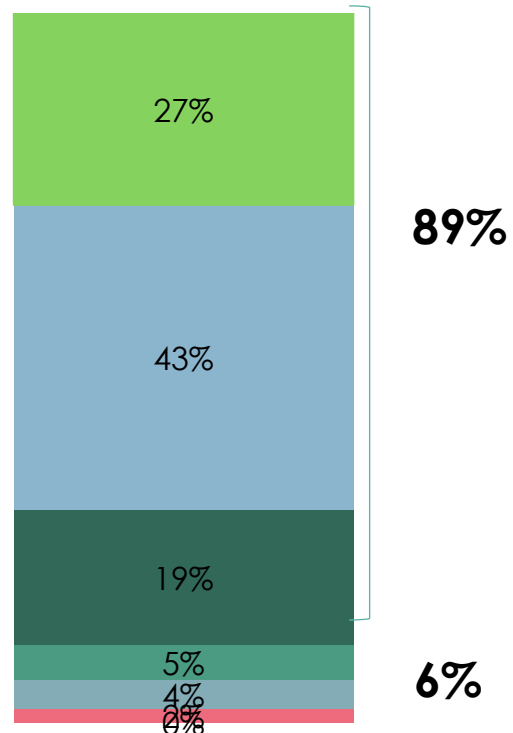
BLUE MARBLE

Overall, customers show a high level of support to the WRMP plan

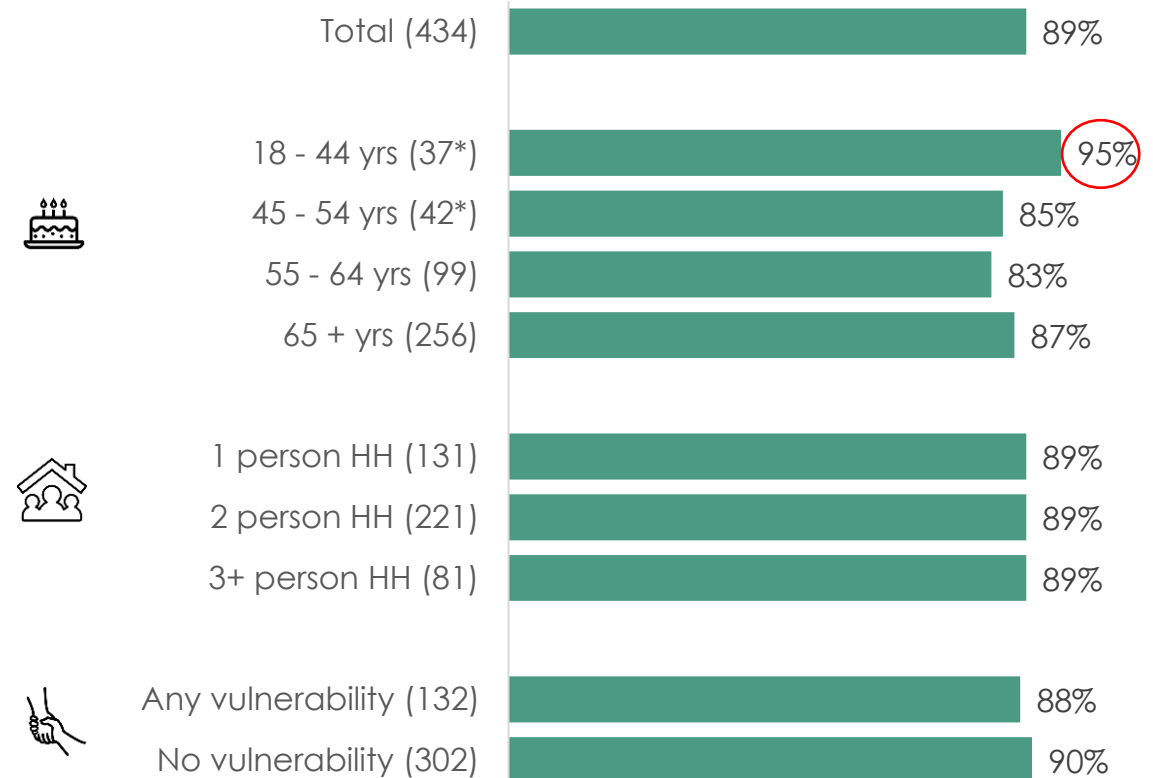
Support is consistently strong across different customer groups. It is highest among those aged 18 – 44, but support is also strong in other age groups.

Overall support of plan

- Strongly support
- Support
- Somewhat support
- Neither support nor don't support
- Somewhat don't support
- Don't support
- Strongly don't support
- Don't know



% of different customer groups who show support for the overall plan



*Caution – low base sizes

Q9a Overall, how much do you support this plan?
Base: All respondents (434)

Those that do not agree their water and sewerage charges are affordable show considerably less support than others.

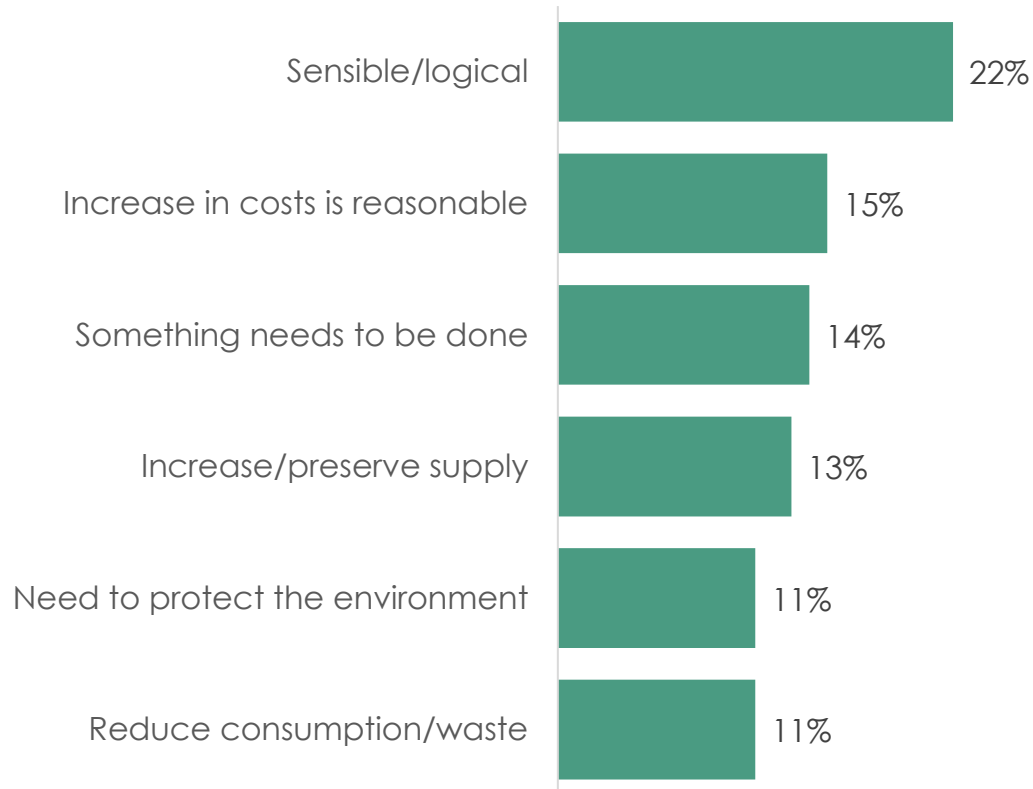


BLUE MARBLE

There is a range of reasons for supporting the plan – but an acknowledgement that ‘something’ needs to be done underpins it, alongside a perception that cost increases are reasonable 7

There are some subtle differences between sub groups – but few clear patterns

Top 5 reasons to support the plan



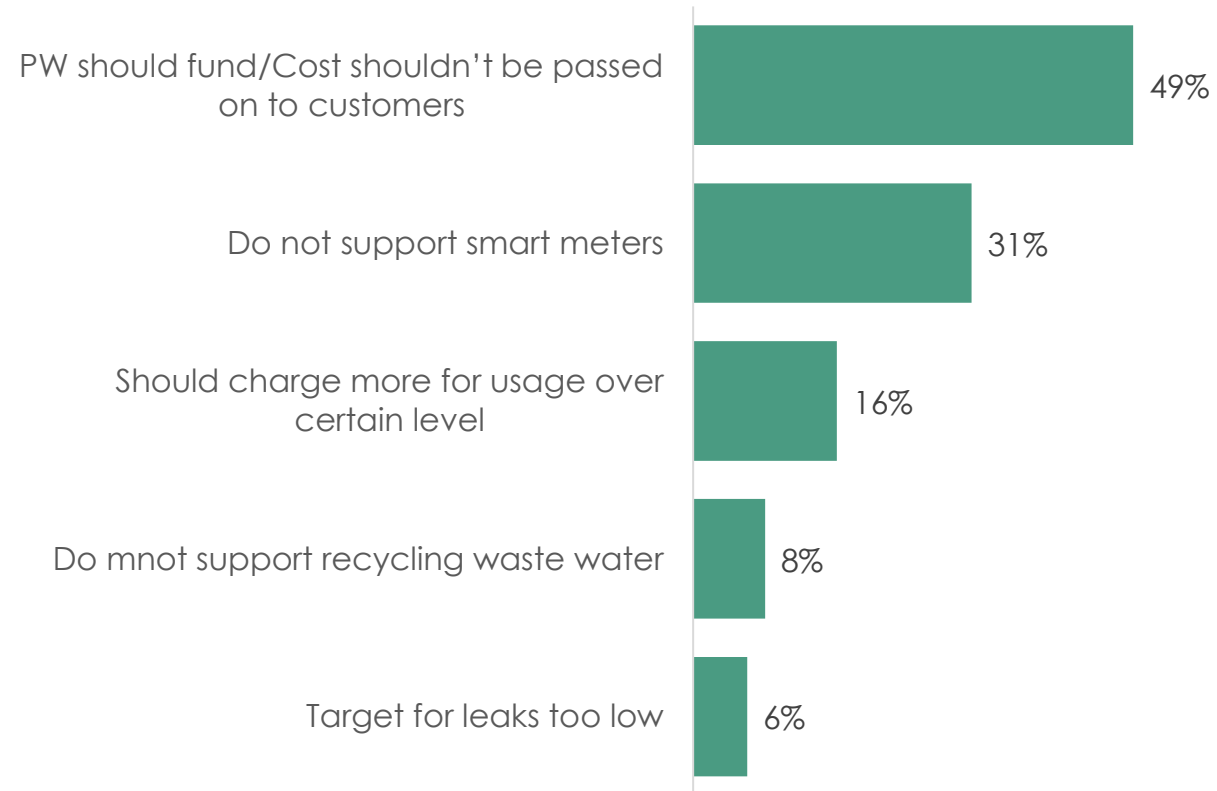
Younger customers are more likely to focus on generic reasons (sensible, increase in costs in reasonable), while older customers place more focus on practicalities such as preserving water and reducing consumption

Customers with a water meter are more likely to mention ‘increase/preserving the supply’ than those without a meter (17% vs 9%). The latter, meanwhile, are more likely to focus on leak reduction as a reason to support the plan (13% vs 5%)

Cost and (apprehension towards) smart meters drive those that do not support the plan, although some also find it is not ambitious enough when it comes to reducing leaks

There are few customers who do not support the plan. As such, the data on this slide is based on a small base size and should be treated with caution. The base size is too small for analysis of sub groups.

Top 5 reasons **NOT** to support the plan



Q9a Overall, how much do you support this plan?

Base: All respondents who do not support the plan (28) – caution: low base size

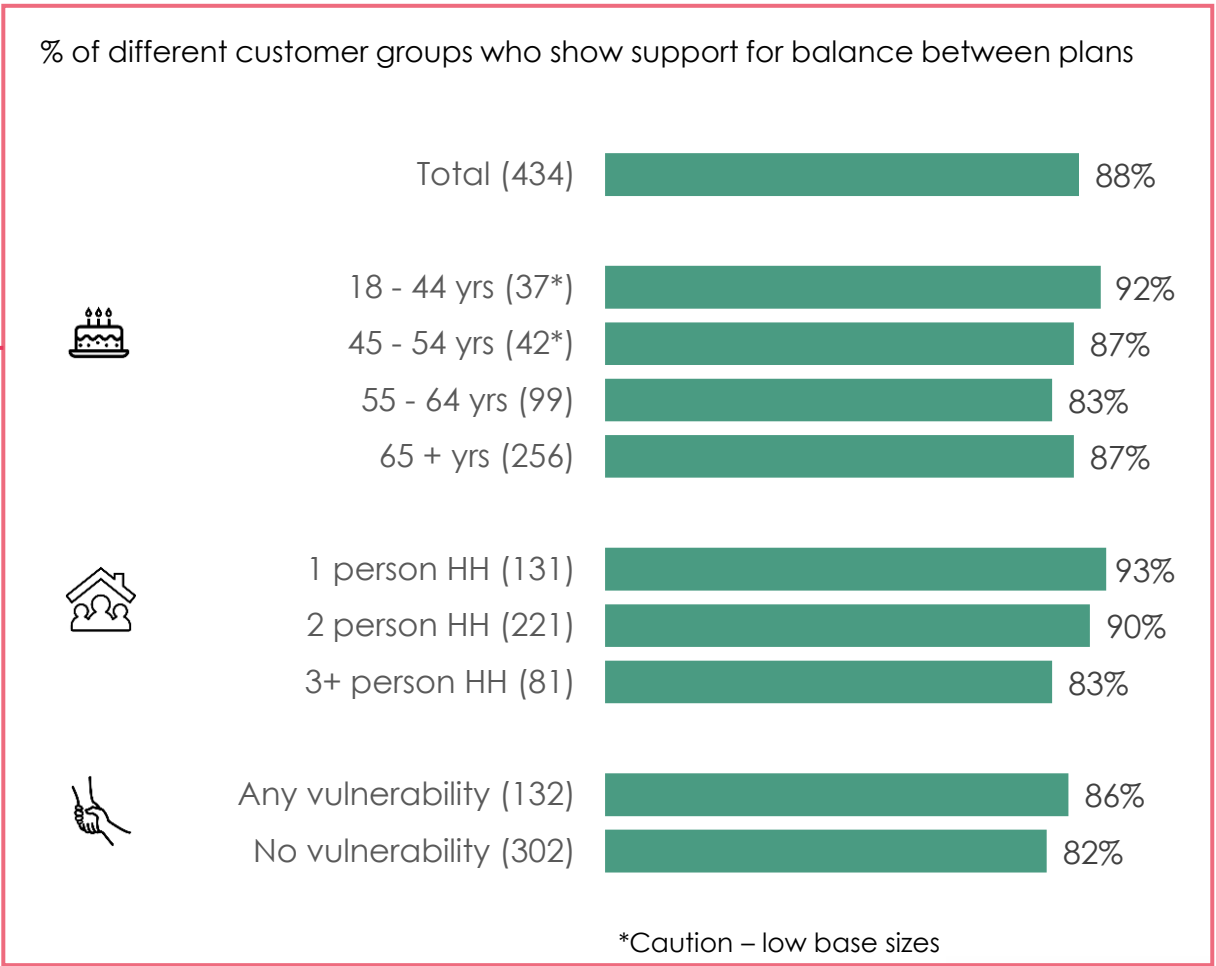
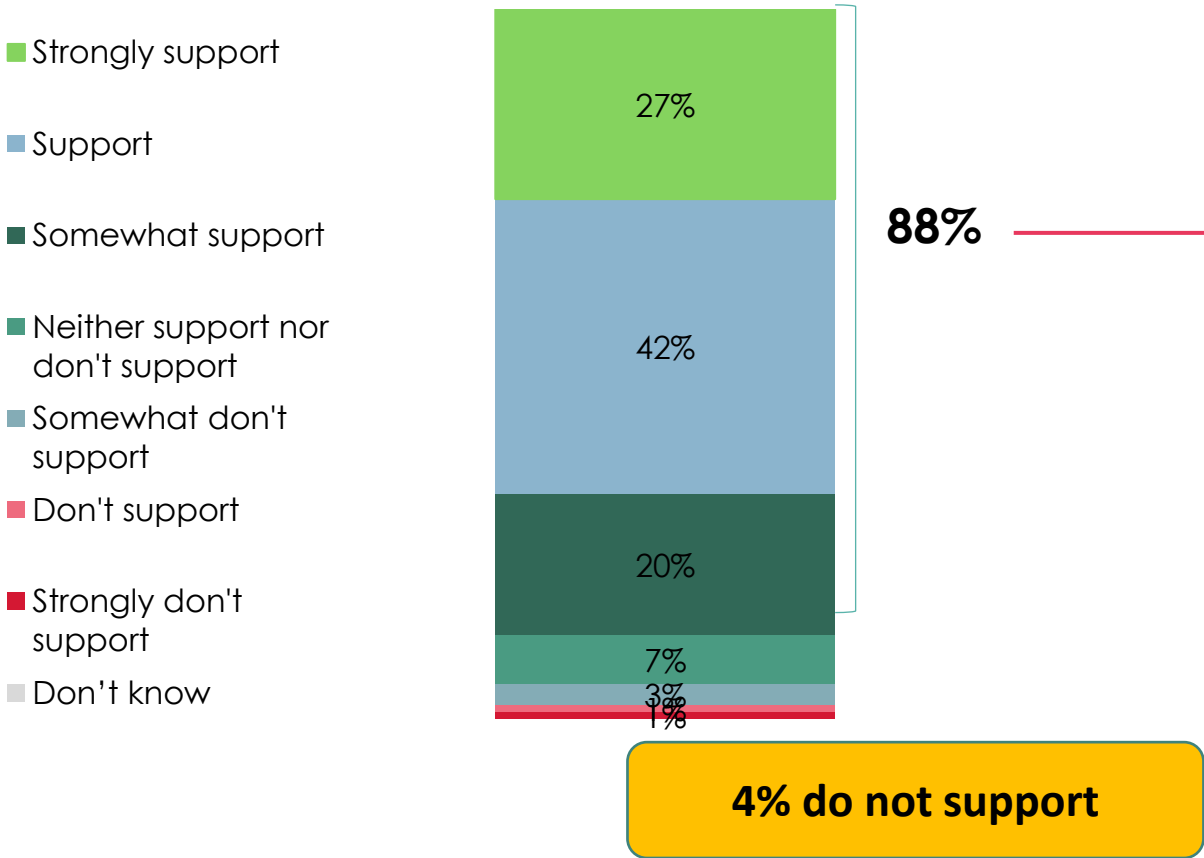


BLUE MARBLE

Most customers support the balance between focus on leak reduction, metering & efficiency and new sources

People in larger households show less support than those in small households but generally there are few differences.

Support for the balance between saving water from leaks, metering and water efficiency, and water being supplied from new sources

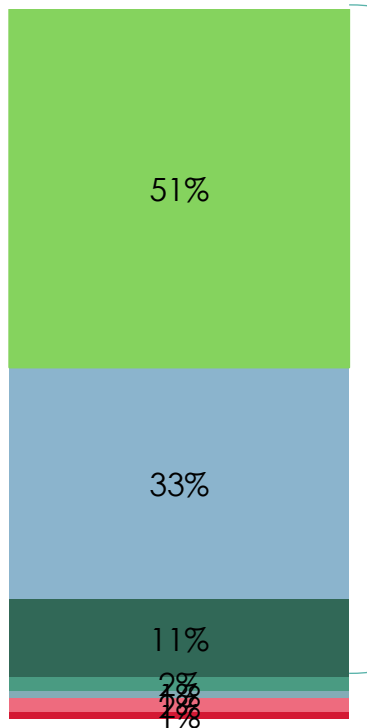


Q10a. Thinking of the plan we have described, how much do you support the balance between saving water from leaks, metering and water efficiency, and water being supplied from new sources?
Base: All respondents (434)

Support is strong across the board, but especially so among younger customers.

Support for plans to reduce leaks by half by 2050

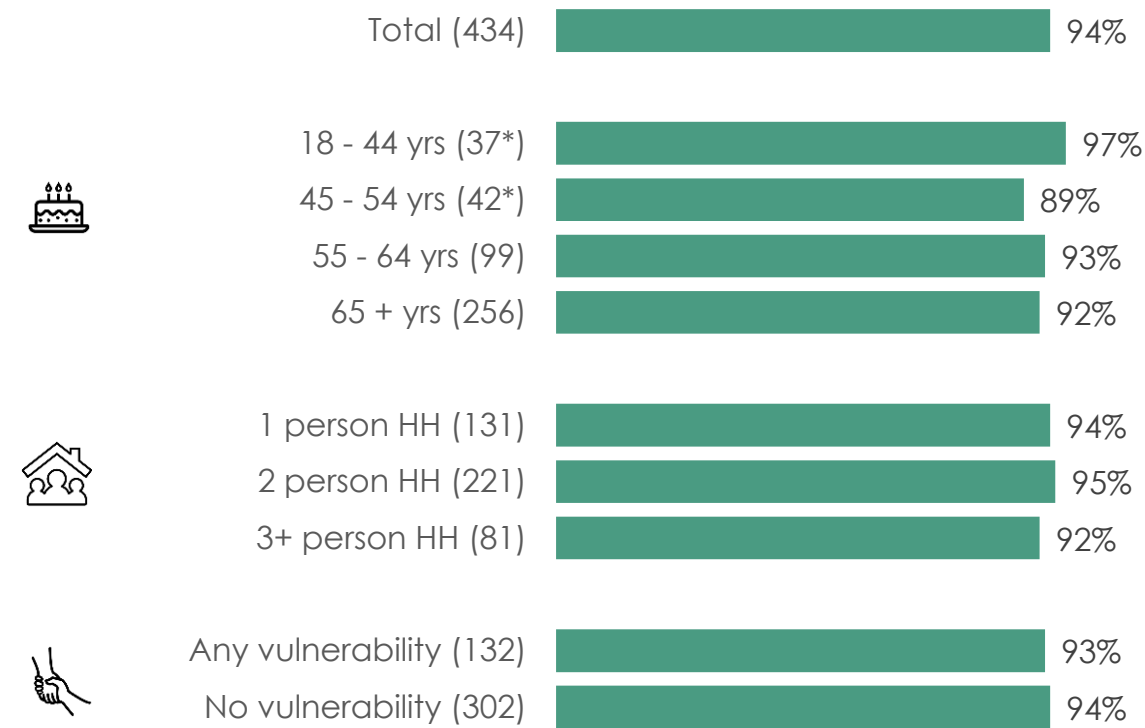
- Strongly support
- Support
- Somewhat support
- Neither support nor don't support
- Somewhat don't support
- Don't support
- Strongly don't support
- Don't know



94%

4% do not support the plans

% of different customer groups who support plans to reduce leaks by half by 2050

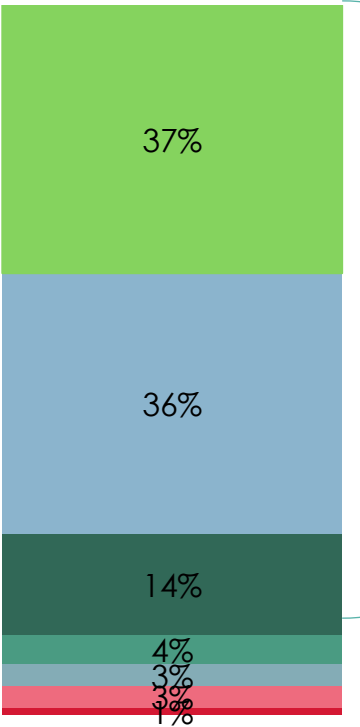


*Caution – low base sizes

There is a consistent level of support despite fluctuations between different age groups

Support for plans to help homeowners and businesses to save water

- Strongly support
- Support
- Somewhat support
- Neither support nor don't support
- Somewhat don't support
- Don't support
- Strongly don't support
- Don't know



87%

8% do not support the plans

% of different customer groups who show support for the plan



*Caution – low base sizes

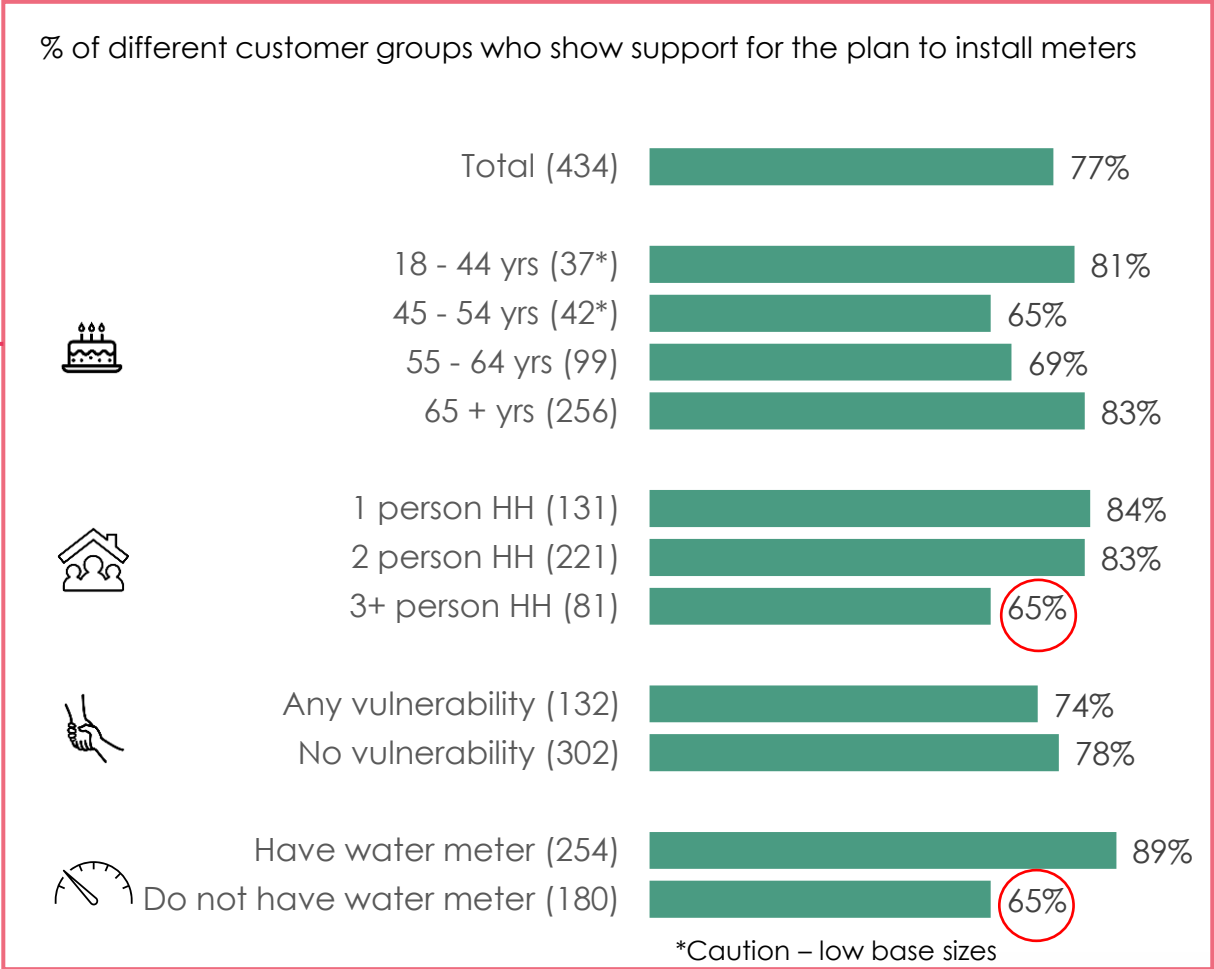
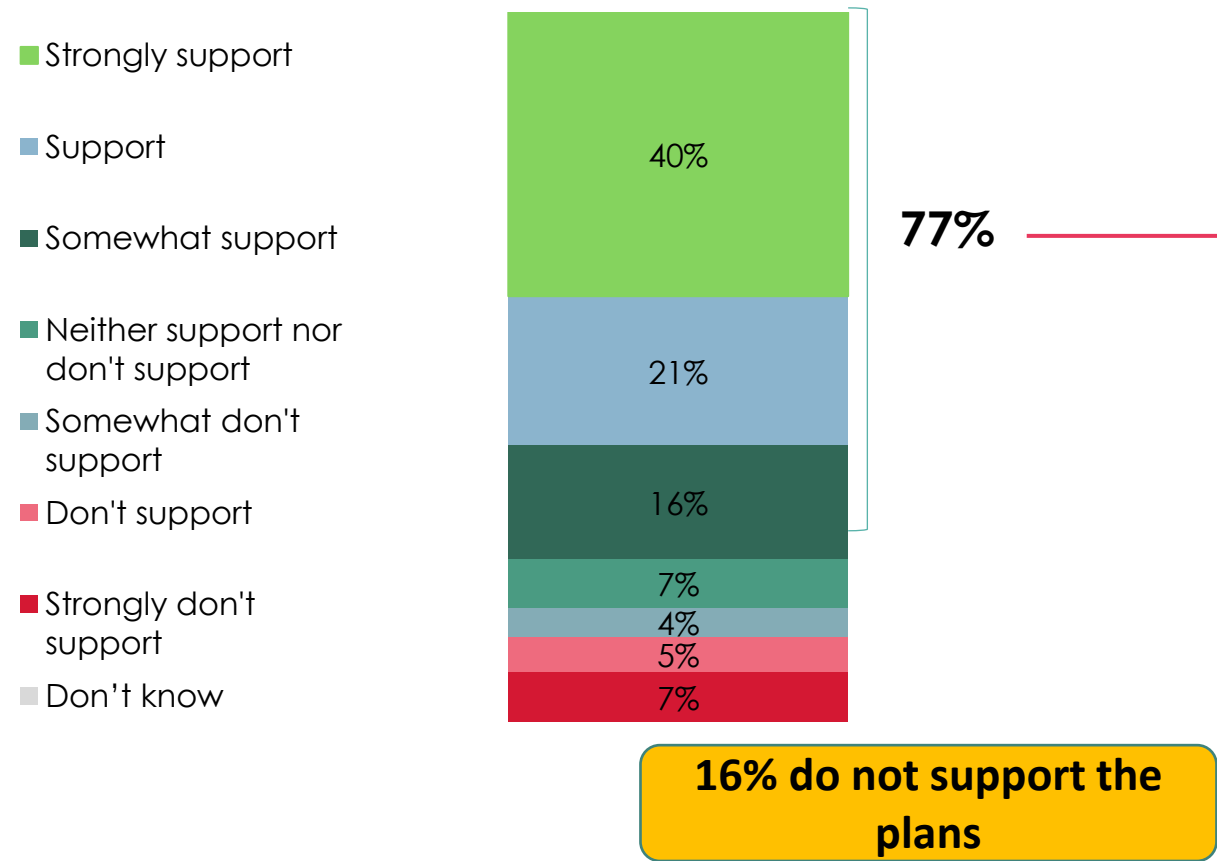
Differences between other sub groups in the sample

- It is one of the few elements of the WRMP where support is higher among customers who are not on water meters than those who are – the difference is, however, not statistically significant
- Customers who feel water and sewerage charges are not affordable for them show significantly less support



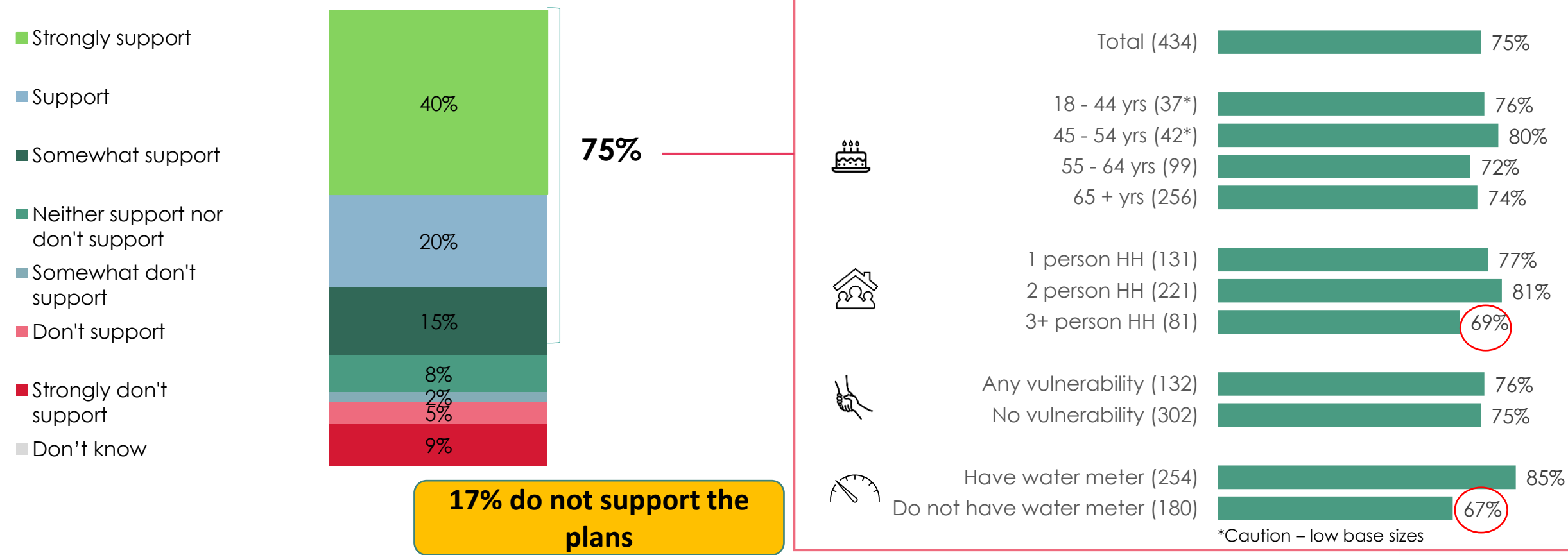
This element of the plan is not quite as widely supported as other elements of the WRMP. Support is clearly lower among unmetered customers, those who live in a bigger household, and those who are aged between 45-64. Support is also significantly lower among customers in social grades DE.

Support for plans to install meters at most homes PW supply



Support for smart meters is the lowest among all elements of the WRMP we tested with customers. But support is still relatively strong across the board. Hesitation is again evident among unmetered customers and those in 3+ person households.

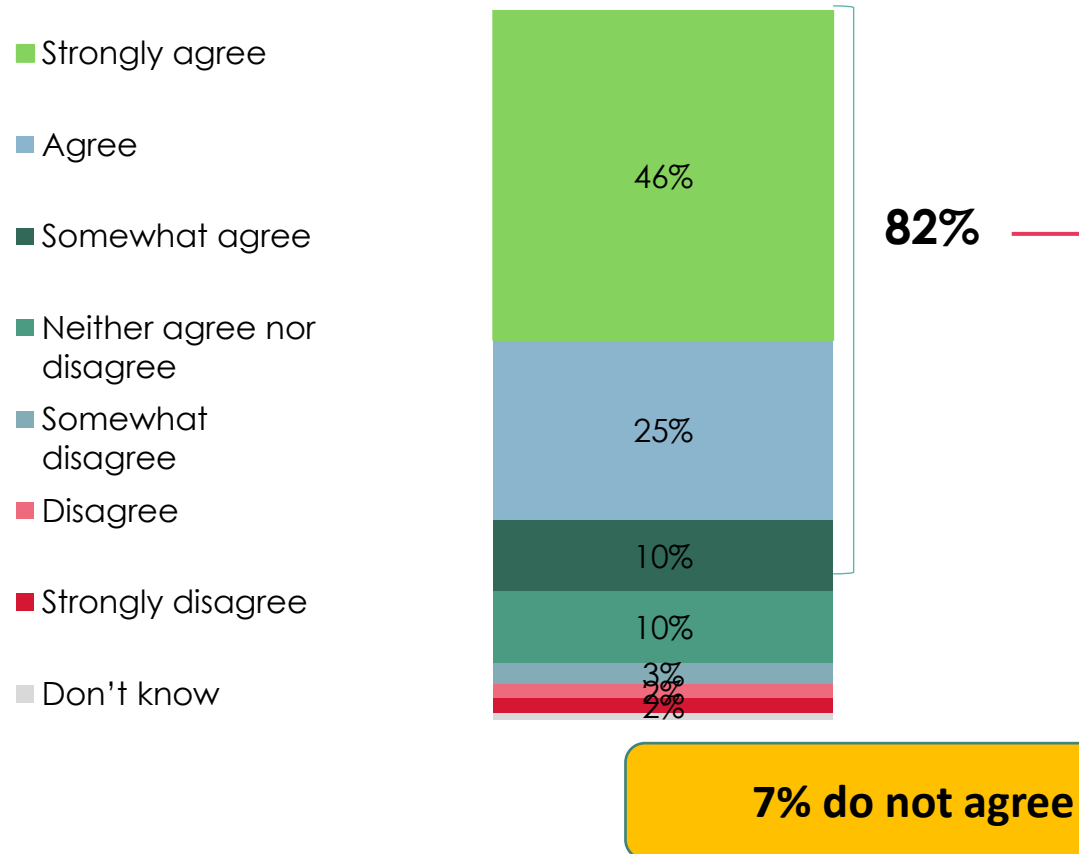
Support for smart water meters



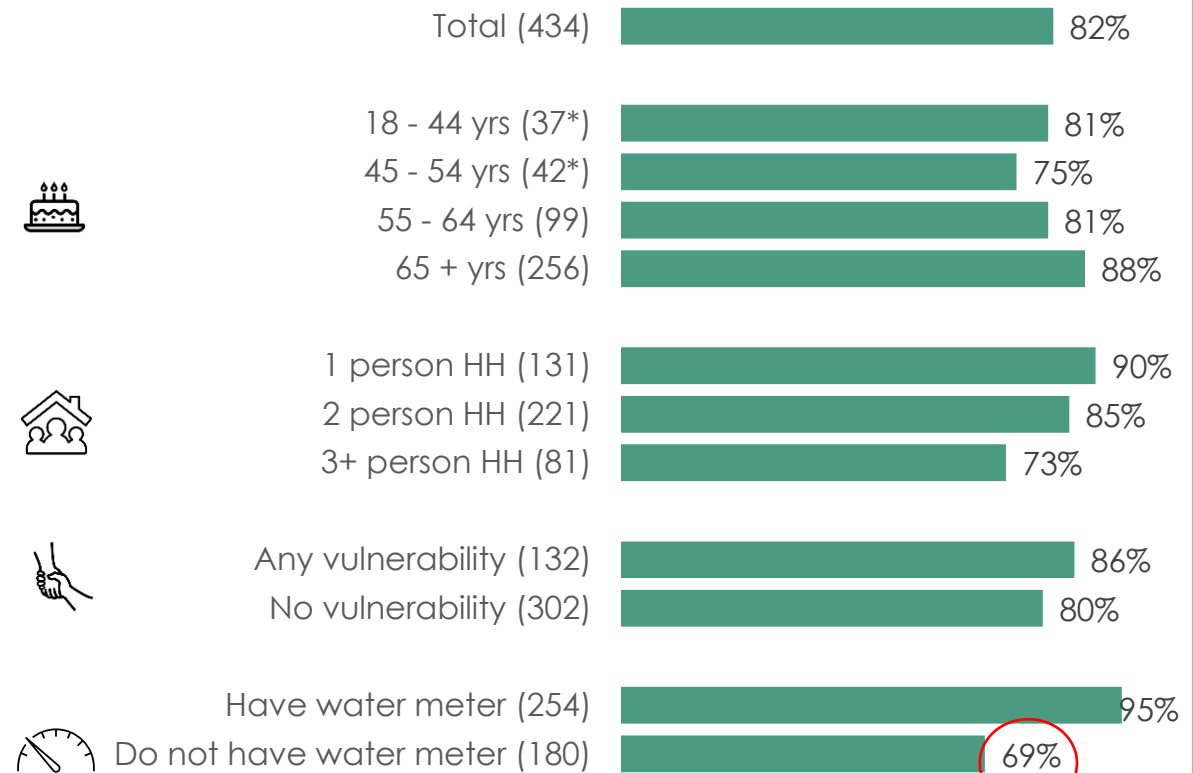
Most customers agree that it is fairer to have water bills based on water usage

There is a clear contrast between metered (95%) and unmetered (69%) customers. Those in larger households are also less in agreement.

Agreement for water bills based on the amount of water a household uses would be fairer than bills based on rateable value



% of different customer groups who agree water bills based on the amount of water a household uses would be fairer



*Caution – low base sizes

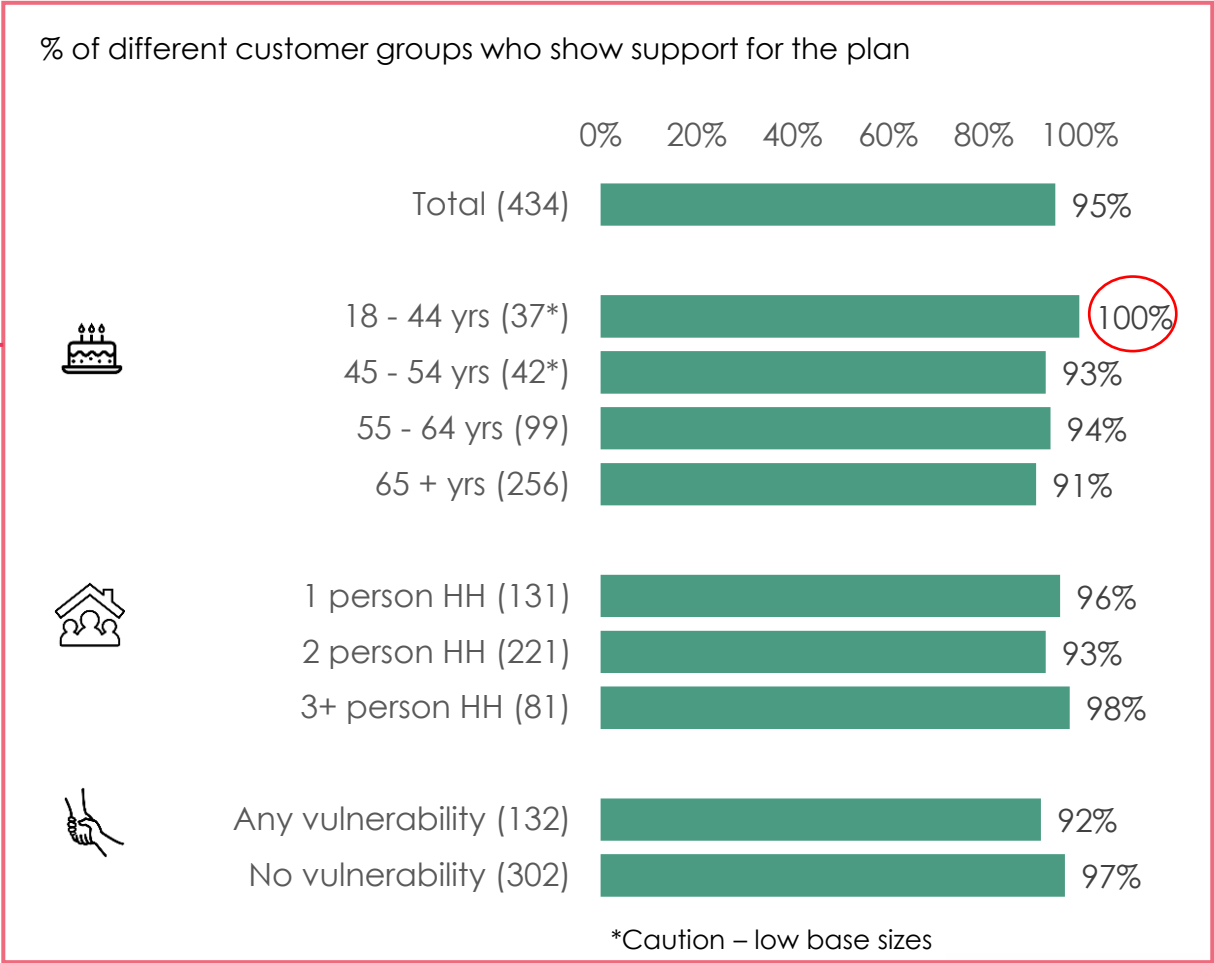
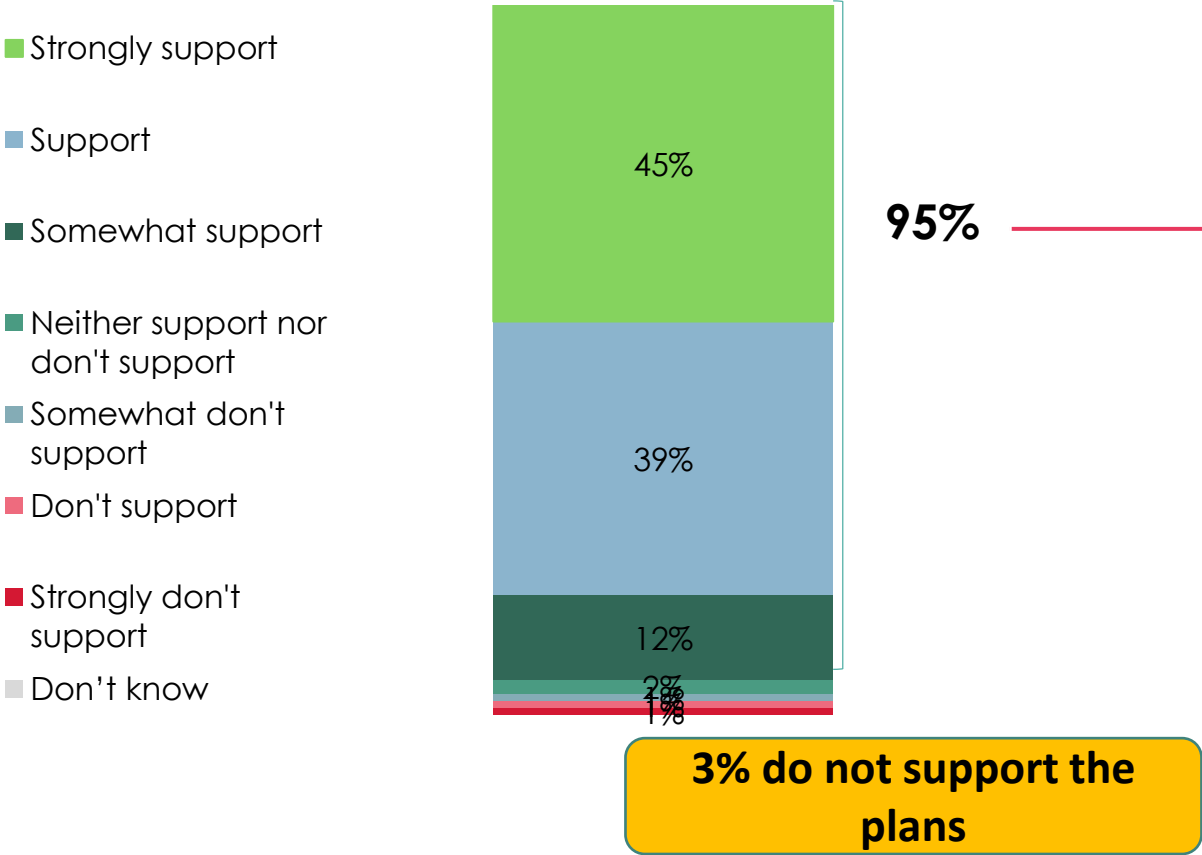
Q7 How much do you agree or disagree that water bills based on the amount of water a household uses would be fairer than bills based on rateable value (the estimated rent of a property)?

Base: All respondents (434)

Customers show universal support for Portsmouth Water's plans to reduce environment water use¹⁶

This plan has the highest level of support among all PW initiatives, and is well-received across all customer groups

Support for plans to secure more water



Q8 How much do you support these plans to secure more water so we can reduce the amount that needs to be taken from rivers, streams and aquifers in our chalk-rich area? Base: All respondents (434)



Affordability

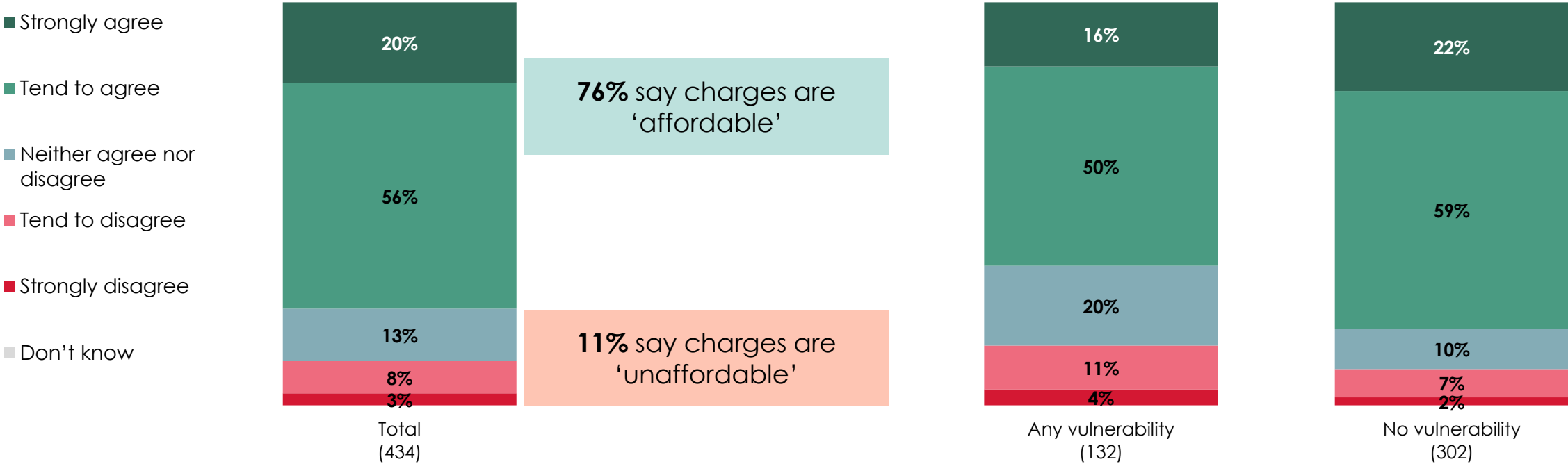


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Most panellists say that the charges are affordable to them – only 10% say it is unaffordable

Those without vulnerabilities, however, are statistically significantly more likely to agree than customers with a vulnerability. The perceived affordability among the latter is, however, still high at 66% (and only 15% disagree).

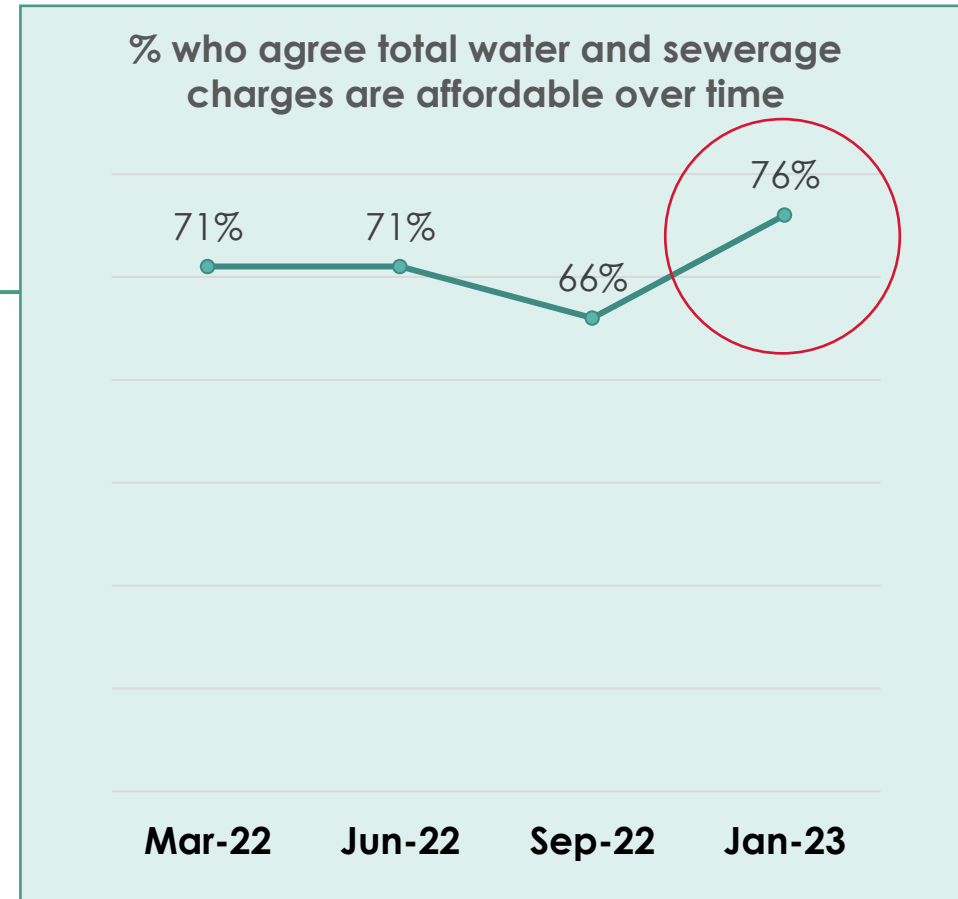
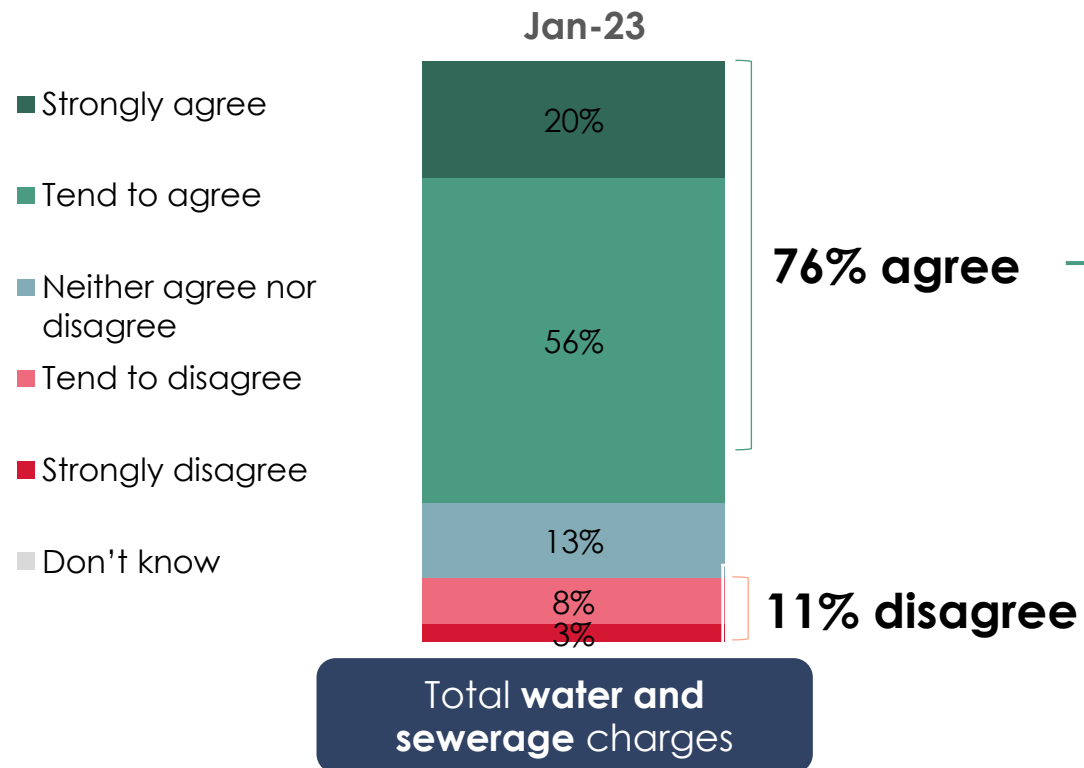
Affordability of total water and sewerage charges



Despite the cost-of-living crisis, 3 in 4 find total water and sewerage charges affordable.

Interestingly, perceived affordability of total charges has increased, even compared to a year ago

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



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

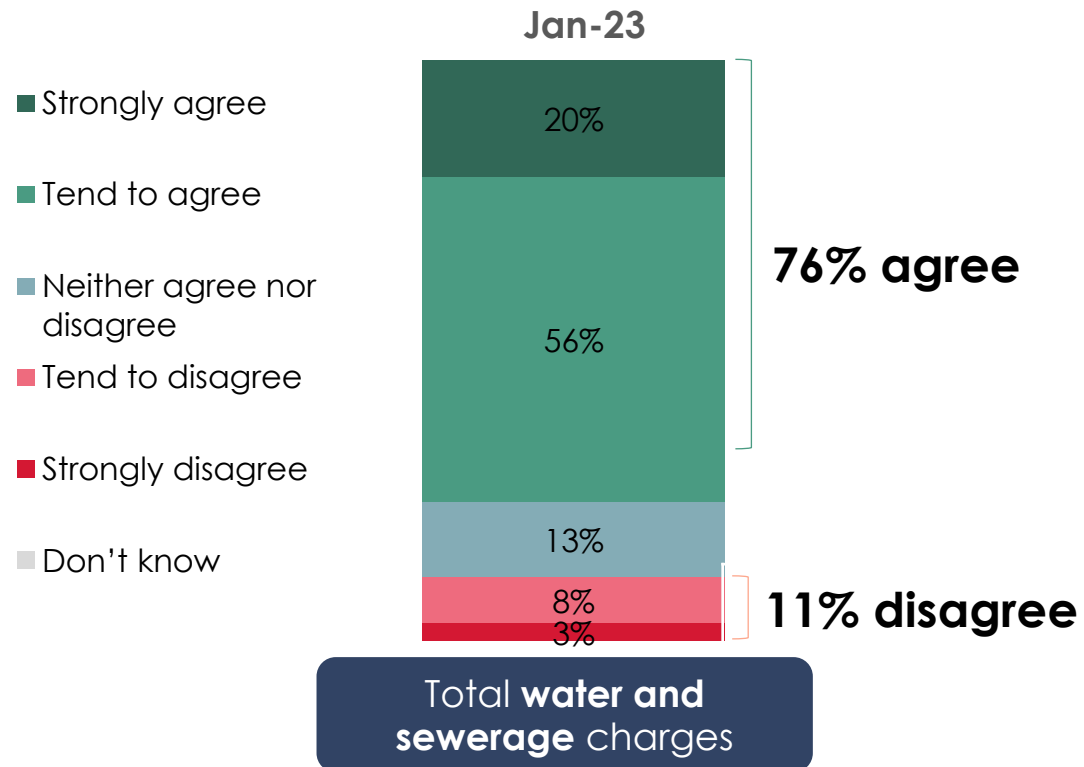
Base: All respondents (434) Wave 1: 11-22 Mar '22, Wave 2: 10-28 Jun '22, Wave 3: 6-20 Sep '22



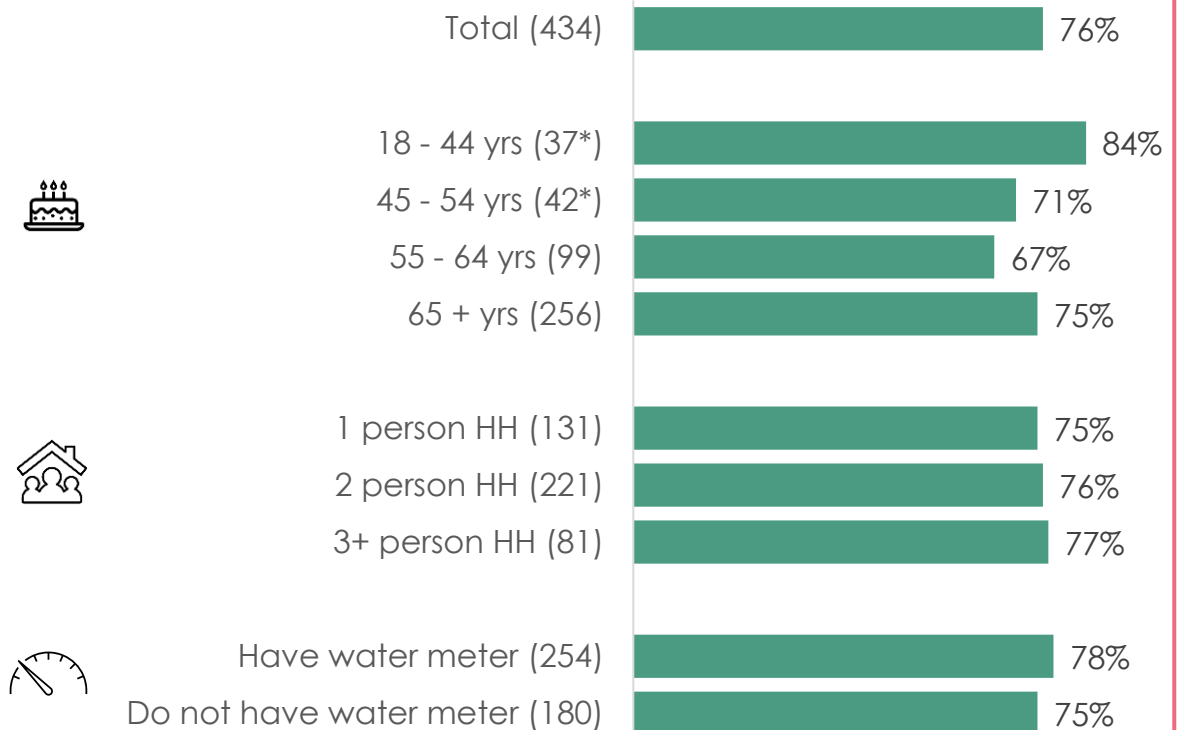
Despite the cost-of-living crisis, 3 in 4 find total water and sewerage charges affordable.

Interestingly, perceived affordability of total charges has increased, even compared to a year ago

Total water and sewerage charges affordable?



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



*Caution – low base sizes

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

Base: All respondents (434) Wave 1: 11-22 Mar '22, Wave 2: 10-28 Jun '22, Wave 3: 6-20 Sep '22



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Across the board, a majority of customers say they agree that charges are affordable to them

But there are some (notable) differences between sub groups – none, however, are unexpected

- Younger customers are (significantly) more likely to find the water and sewerage charges they pay affordable than those aged 45-64. Among those aged 65 and over perceived affordability is higher again.
- Those not in employment or retired are significantly less likely to find the charges affordable, as are those in social grades DE (compared to other social grades)
- Those supporting each element of the WRMP we showed them are consistently more likely to agree that charges are affordable to them than those that do not support elements of the plan
 - However: support for the plan is strong and as a result the base sizes for the latter group are consistently small





Summary



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Executive summary

1

Customers show a high level of support to the WRMP plan (89%)

Support is consistently strong across different customer groups. It is highest among those aged 18 – 44, but support is also strong in other age groups.

2

There is widespread support for the separate elements of the WRMP, including installing (smart) water meters

Across the board, those that find bills unaffordable are less supportive than those that find them affordable

3

Leak reduction and plans to secure more water are the most supported elements of the plan

94% support Portsmouth Water's plans around leak reduction, 95% support the plans to secure more water

4

While a majority is supportive of plans to install water meters (77%) and the use of smart water meters (75%) they are the least supported elements. Customers in larger households and those without a water meter are least likely to be supportive

5

3 in 4 panellists agree that the total water and sewerage charges that they pay are affordable to them, an increase on 2022 levels.

The cost-of-living crisis shows no signs of abating but with a huge focus on food and energy price inflation, there may be an acknowledgement that water bills are more affordable by comparison. This would benefit from some further investigation.



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63. Portsmouth Water_Barometer Wave 4_Report_V2.1

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 (434) 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

