

Portsmouth Water Plan Choices – Triangulation

3rd May 2023

Photo by Piotr Gzik on Unsplash



7 evidence sources feed into this overarching view of consumer choices

Here we assign an evidence score* to each workstream, based on evidence robustness and coverage.

*Details of the scoring are in the Appendix.

Description	Report Date	Audiences covered	Author	Method	Geographic Focus	How informed are participants?	Sample size	Robustness score (1=Low to 5=High)	PW coverage score (1=Low to 5=High)	Total evidence score (Max 10)	Notes on assessment
Barometer 5 – Plan Choices	Apr 23	General (HH)	BM	Quant Research (online)	PW – all	Mix of previously informed and uninformed	690	4	5	9	Large sample but this over-represents older customers. Weighting applied to match broad demographic profile
Portsmouth Water Choices Consultation	Apr 23	General (HH); Stakeholders	BM	Quant Engagement (online)	PW - all	Previously uninformed	402	3	5	8	Good overall sample size but entirely self-selecting sample and not weighted to correct for any biases
In Community Plan Choices	Apr 23	Vulnerable	BM	Quant Research (F2F)	PW – partial (Chichester and Gosport)	Previously uninformed	180	4	4	8	Quota controlled sampling & 2 different locations provides a representative mix of customers
Uni Barometer 1 – Plan Choices	Apr 23	Future (Portsmouth University students)	BM	Quant Research (online)	PW – partial (Portsmouth University)	Previously uninformed	64	3	3	6	Fairly small quant sample; only partially representing all future customers in the region (only University students)
University Deliberative Research	Apr 23	Future (Portsmouth University students)	BM	Qual Research (4 groups)	PW – partial (Portsmouth University)	Informed during exercise	29	4	3	7	Good size qual sample; only partially representing all future customers in the region (only University students)
NHH Plan Choices Qual	May 23	NHH (plus one NAV & 1 stakeholder)	BM	Qual Research (Depths)	PW - all	Informed during exercise	17	3	5	8	Did not achieve desired numbers of larger NHH, or developers – bias to SMEs
CAP 2 – Response to early plan choices	Dec 22	HH, Future, Vulnerable, NHH	BM	Qual Research (online groups & depths)	PW –all	Previously informed	21	4	5	9	Provides a qual view - all groups covered but smaller samples



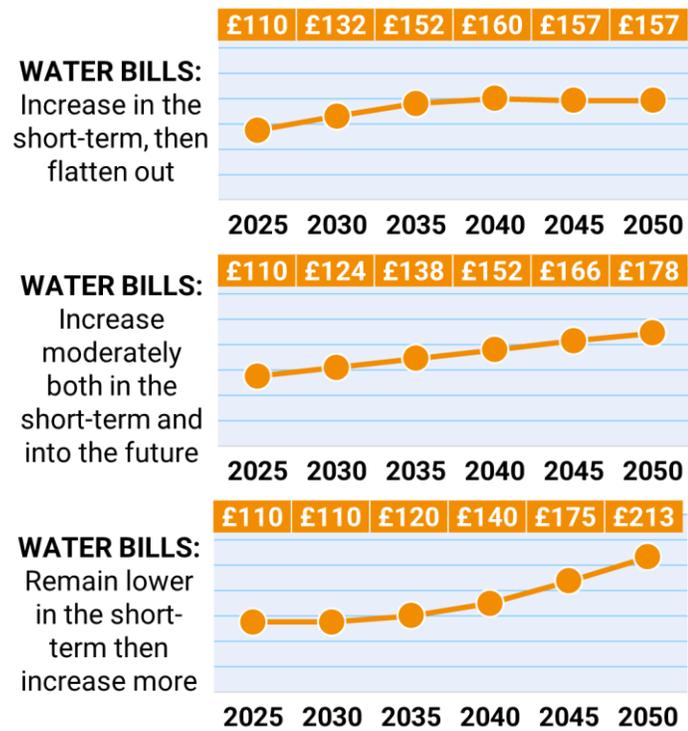
Results summary for each area



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Summary of results for all evidence sources : Long term bill profile 2025-50

The larger-scale evidence sources with the widest representation show a clear preference towards the ‘balanced’ bill profile option. However, future customers and those with vulnerabilities over-index on the bill profile that increases in the short-term, then flattens out – the option with the lowest increase in bills in the longer run.



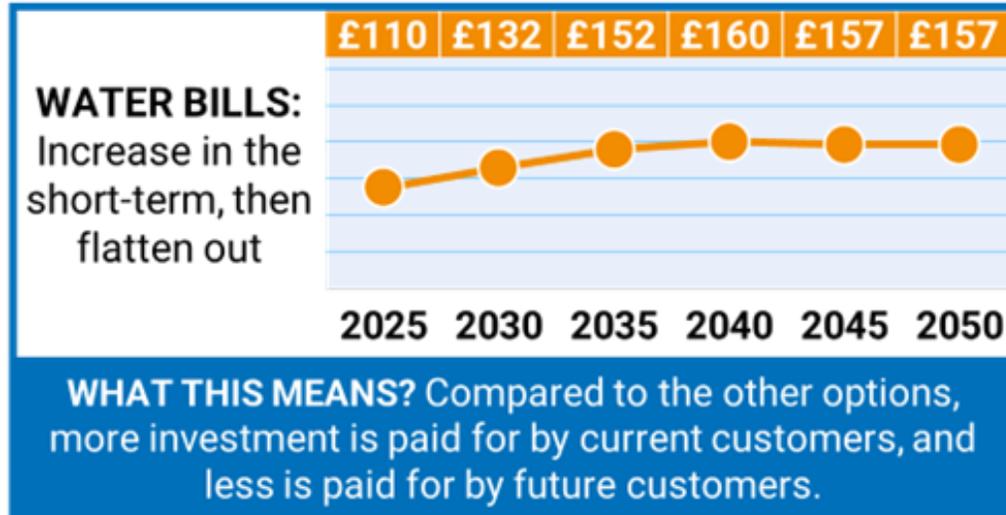
	Barometer 4 – (General HH bill payers) % choosing	Portsmouth Water Consultation (General) % choosing	In Community (Vulnerable households) % choosing	Uni Barometer 1 (Future customers) % choosing	University Deliberative (Future customers) No. choosing	NHH Plan Choices Qual (NHH) No. choosing	CAP 2 – Early plan choices (HH, Future, Vuln, NHH) Supporting evidence
Increase in the short-term, then flatten out	24%	21%	44%	48%	15	2	<p>During November / December 2022, when this research was conducted, customers are feeling strongly impacted by the rising cost of living, and therefore less tolerant of bill increases.</p> <p>Customers bring up sharp price and bill increases across a range of products and services they consume, and feel strongly impacted by these changes.</p>
Increase moderately both in the short-term and into the future	68%	68%	43%	42%	12	10	
Remain lower in the short-term then increase more	9%	11%	13%	9%	0	3	

■ Half or more ■ A third to a half ■ A fifth to a third ■ Under a fifth

Highest share of the vote is in **bold**

Long term bill profile 2025-50 – understanding the Future customer view

Based on the deliberative research amongst students we see that many future customers felt it fairest that current customers pay the largest amount towards initiatives:



Positives

- Don't want to pay more than existing customers, as not a problem Gen Z created
- Students use less water and have less money than older people
- Awareness of cost-of-living crisis, but sacrifices must be made to carry out plans, especially when it ends with cheapest bill out of the 3 options in 2050

Negatives

- Current customers paying most of the investment is unfair when they won't benefit as much as younger customers
- This makes plan less appealing to older groups and hard to garner as much support

Option preferred by most



Summary of results for all evidence sources : Leakage Choice

Across the board, the evidence shows a widespread view that leakage should receive the high investment option. Reducing leakage is seen as an important goal to achieve, and the scale of leaks can be an emotive issue.

Reducing leakage

		Barometer 4 – (General HH bill payers) % choosing	Portsmouth Water Consultation (General) % choosing	In Community (Vulnerable households) % choosing	Uni Barometer 1 (Future customers) % choosing	University Deliberative (Future customers) Supporting evidence	NHH Plan Choices Qual (NHH) No. choosing	CAP 2 – Early plan choices (HH, Future, Vuln, NHH) Supporting evidence
Low: Reduce leakage by 50% by 2050. This meets minimum government expectations	£0.00	11%	13%	13%	14%	Almost all chose the high investment option because it is the quickest and a reasonable price. Widespread view that leakage will only worsen over time, becoming more costly, so it makes sense to address the issue as soon as possible	1	Opted for High option (note this was even more ambitious than the final plan choices option presented).
Medium: Reduce leakage by 50% by 2045.	£0.40 (£1.82*)	15%	13%	25%	22%		2	Acknowledged as important to ensure water is not wasted – an emotive issue that evokes strong reactions from customers. A sense that it would be great if PW could achieve its target even sooner (although they acknowledge the scale of the issue).
High: Reduce leakage by 50% by 2040. This is what Portsmouth Water would like to do	£0.55 (£2.50*)	74%	74%	62%	64%		11	

* Example bill amount shown to NHH customers

■ Half or more
 ■ A third to a half
 ■ Under a fifth

Highest share of the vote is in **bold**

Summary of results for all evidence sources : Reliable Supply Choice

There is not a clear majority on which is the right choice for reliability for most of the evidence sources, although all except Future customers tend towards the **medium** option.

Reliable supply

		Barometer 4 – (General HH bill payers) % choosing	Portsmouth Water Consultation (General) % choosing	In Community (Vulnerable households) % choosing	Uni Barometer 1 (Future customers) % choosing	University Deliberative (Future customers) Supporting evidence	NHH Plan Choices Qual (NHH) No. choosing	CAP 2 – Early plan choices (HH, Future, Vuln, NHH) Supporting evidence
Low: The number of households without water for 3 hours in any year goes up from 1 in 100 to 1 in 20 (as reliable as the industry average)	£0.00	21%	26%	17%	20%	Future customers have a strong sense of social justice and fairness; we suggest that this may inspire more belief that no one should be without water, - but this requires further validation	2	Opted for medium option. Wanting to maintain best interruption in the industry sounds like a sensible and ambitious long term vision to most. Ensuring that customers don't experience severe interruption to their supply is seen as important, particularly for customers with families or vulnerabilities who might rely on a steady water supply.
Medium: The number of households without water for 3 hours in any year stays at 1 in 100 (the most reliable in the country)	£0.67 (£3.05*)	46%	47%	45%	36%		9	They haven't had any interruption experiences themselves, which makes them think that PW is already doing well and does not need to do more in this area.
High: No-one would be without water for 3 hours in any year. This is what Portsmouth Water would like to do.	£1.35 (£6.14*)	33%	27%	38%	44%		3	A few question why customers need to pay more if PW already has industry leading performance.

* Example bill amount shown to NHH customers

■ Half or more
 ■ A third to a half
 ■ A fifth to a third
 ■ Under a fifth

Highest share of the vote is in **bold**

Within the depth interviews amongst NHH customers there is a stronger orientation to the medium option (status quo) than we see for other groups.

KEEPING YOUR WATER SUPPLY RELIABLE ▲	
 Low: The number of premises without water for 3 hours in any year goes up from 1 in 100 to 1 in 20 (as reliable as the industry average)	£0.00
 Medium: The number of premises without water for 3 hours in any year stays at 1 in 100 (the most reliable in the country)	£3.05
 High: No-one would be without water for 3 hours in any year. This is what Portsmouth Water would like to do.	£6.14

Drivers for choosing the status quo (medium option)

- Portsmouth Water already doing well with 1 in 100 supply interruptions considered a good score: most customers want to see PW ‘maintain the service’ with middle option.
- Customers are not aware of any interruptions to their water supply and so expect level to be maintained
 - Lack of direct experience engenders a lack of immediacy: no strong desire for this to be a high investment option
- Costs double for the high option and medium is seen as better value for money
- ‘Reliability’ can be less realisable/interesting topic as benefits are less immediately appreciated
 - Contextualised in terms of the problem (supply interruptions) rather than a more positive measure (reliability of critical resource)
 - Potentially a need to add in more memorable details to help communication e.g. referencing Havant Thicket Reservoir.



Summary of results for all evidence sources : Lead Pipes Choice

The highest share of respondents in all evidence sources choose the 'high investment' option, however, it is notably more polarised for those completing the Portsmouth Water consultation. Qualitative evidence suggest that knowledge about lead pipes influences views; those taking part in the consultation may have different knowledge levels.

Lead pipes

		Barometer 4 – (General HH bill payers) % choosing	Portsmouth Water Consultation (General) % choosing	In Community (Vulnerable households) % choosing	Uni Barometer 1 (Future customers) % choosing	University Deliberative (Future customers) Supporting evidence	NHH Plan Choices Qual (NHH) No. choosing	CAP 2 – Early plan choices (HH, Future, Vuln, NHH) Supporting evidence
Low: All homes have access to water with no exposure to lead by 2070.	£0.00	26%	38%	16%	17%		2	Opted for High option (note this was even more ambitious than the final plan choices presented).
Medium: All homes have access to water with no exposure to lead by 2060.	£1.05 (£4.77*)	24%	21%	29%	27%	n/a, not covered in detail	2	In the context of a group discussion, where people were informed about the impact of lead pipes, replacement is an emotive issue, and deemed as very important by most due to its potential health implications, especially for children.
High: All homes have access to water with no exposure to lead by 2050. This is what Portsmouth Water would like to do.	£1.47 (£6.68*)	50%	41%	54%	56%		10	Customers raise questions regarding the scale of the problem - i.e. how many houses in Portsmouth still have lead piping, and some push back on the plan of lead pipe replacement as they feel it's not PW's responsibility to resolve this issue.

* Example bill amount shown to NHH customers

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 ■ A third to a half
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 ■ Under a fifth

Highest share of the vote is in **bold**

Summary of results for all evidence sources : Local Environment Choice

Across the evidence sources, the majority choose the high investment option (a relatively low cost on the bill). Future customers are particularly likely to choose the high option here, having high levels of concern over environmental issues.

Local environment

	Barometer 4 – (General HH bill payers) % choosing	Portsmouth Water Consultation (General) % choosing	In Community (Vulnerable households) % choosing	Uni Barometer 1 (Future customers) % choosing	University Deliberative (Future customers) Supporting evidence	NHH Plan Choices Qual (NHH) No. choosing	CAP 2 – Early plan choices (HH, Future, Vuln, NHH) Supporting evidence
Low: Make sure biodiversity doesn't deteriorate at our key sites and no increase in our grants to enhance the environment £0.00	15%	19%	11%	11%	Higher than average understanding of environmental issues and concerns over what the future might hold. Frustration over lack of urgency from government and industry in addressing the issues	1	Opted for Medium option (NB this was equivalent to the 'High' final plan choices option presented). It is seen as important to enhance and protect the environment, in an effort to counter the negative impact that we have on the environment more broadly. However, they feel that this plan lacks specificity, and would like to see more information regarding what it would involve and how it would be measured
Medium: Improve biodiversity at our key sites by 2030 but no increase in our grants to enhance the environment £0.06 (£0.27*)	20%	21%	34%	16%		6	
High: Improve biodiversity at our key sites by 2030 and double our grants to enhance the environment £0.08 (£0.36*)	65%	60%	55%	73%		7	

* Example bill amount shown to NHH customers

■ Half or more
 ■ A third to a half
 ■ A fifth to a third
 ■ Under a fifth

Highest share of the vote is in **bold**



Triangulating and overall conclusion



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Identifying tensions and weighing the evidence

	What do the majority of sources suggest?	What do the most robust sources suggest?	Tensions / conflicts in evidence	Understanding reasons behind tensions / conflicts	Weighing up evidence for overall balanced view
Long term bill profile	Overall bill payers have a preference for the 'balanced' profile , but evidence for some key groups shows more favour for the 'short term rise then flat' profile .	The most robust and widely representative reports show an overall preference for the 'balanced' bill profile.	The tensions are between overall bill payers and other groups: Future customers prefer the 'short-term rise then flat' profile, and those with vulnerabilities (including financial vulnerabilities) also over-index on this option.	Future customers felt it fairest that current customers pay the largest amount towards initiatives – the problems faced are not problems that GenZ created; qualitative evidence implies more vulnerable customers are looking for the least 'sharp' bill increase / lowest absolute rise.	The wider customer base <i>strongly</i> prefer the balanced profile. Future customers may validly have a different view but their overall preference is <i>less clear-cut</i> than existing customers, and they represent a smaller (albeit still important) group. Weighing up, the balanced profile has the greatest backing. Yet this has a clear condition that those with vulnerabilities need to be shielded against large /steep bill increases over the long run; there is a role for special tariff(s) to keep the rate of bill increase manageable for these customers into the future.
Reducing leakage	In all evidence sources there is a widespread view that leakage should receive the high investment option .	Very strong majority choose high investment option .	No notable tensions.	n/a	Evidence consistently points to majority endorsement of the high investment option for reducing leakage. Qualitative insights suggest some are keen for even greater urgency / ambition in this area than the 'high' option offers.
Reliable supply	Consumers tend towards the medium option which maintains the status quo of industry-leading performance.	The most robust and widely representative reports show the 'medium' option is significantly more endorsed than others.	Future customers indicate a greater preference for the high investment option.	Future customers have a strong sense of social justice and fairness; we suggest this may foment belief that no one should be without water, (particularly vulnerable people reliant on a steady supply).	The medium option on balance strikes the best compromise. This is backed up by qualitative insight that most customers have not had any interruption experiences, and so believe PW is already doing well and does not need to do even more in this area.
Lead pipes	The majority of sources point to the high option above the others – but there is not complete consensus.	Some divergence – the Portsmouth Water consultation exhibits more polarised views .	The Portsmouth Water consultation exhibits more polarised views than other evidence sources – 'Low' option nearly as popular as 'High'.	Qual research also suggests some opposing views. Views may depend on knowledge about the issue. Those who did the PW consultation may have stronger ingoing opinions / differing knowledge vs. research participants	On balance the most widespread choice is for the high investment option but Portsmouth Water need to be aware that a substantial minority may actively object to this, as they do not feel lead pipes are a significant issue and / or that it is not PW's responsibility to fix (at a cost to bill payers). Communication of the reasons for the spend in this area may be particularly important.
Local environment	In all evidence sources a majority select the high investment option .	A consistent majority choose high investment option .	Vulnerable customers endorse the high option less widely; Future customers endorse it more.	Future customers have higher levels of concern over environmental issues, while for some with other day-to-day challenges this may be a slightly lower priority for spend.	The evidence consistently points to the high option although those with (financial) vulnerabilities have more pressing priorities and are less likely to want bill increases to fund environmental initiatives - even if relatively small.

Overall conclusion

Broadly a consistent picture across evidence sources, but there are some important variations by specific groups that should be factored into Portsmouth Water's plans and communications.

Bill profile 2025-30



Weighing up the evidence, while it is not the preference for all groups, the **balanced profile** clearly has the greatest customer backing overall. Yet those with vulnerabilities need to be shielded against large bill increases: there is an essential role for special tariff(s) to keep the rate of bill increase manageable for these customers over the long term.

Reducing leakage



High: Reduce leakage by 50% by 2040. This is what Portsmouth Water would like to do

£0.55
(£2.50*)

Evidence consistently points to majority endorsement of the **high investment option** for reducing leakage. Qualitative insights suggest this is the most compelling investment area of all, and that **some are keen for even greater urgency / ambition** than the 'high' option offers.

Reliable supply



Medium: The number of households without water for 3 hours in any year stays at 1 in 100 (the most reliable in the country)

£0.67
(£3.05*)

The **medium investment option** on balance strikes the best compromise for reliability – maintaining best in industry performance at a reasonable cost. Qualitative insight tells us that most customers have not had any interruption experiences, and so believe PW is already doing well and does not need to do more in this area.

Lead pipes



High: All homes have access to water with no exposure to lead by 2050. This is what Portsmouth Water would like to do.

£1.47
(£6.68*)

On balance the most widespread choice is for the **high investment option** but Portsmouth Water need to be aware that a substantial minority may actively object to this, as they do not feel lead pipes are a significant issue and / or that it's not PW's responsibility to fix them (at a cost to bill payers). Communication of the reasons for the spend in this area may be particularly important, as many people are unaware of the issue / lacking knowledge.

Local environment



High: Improve biodiversity at our key sites by 2030 and double our grants to enhance the environment.

£0.08
(£0.36*)

The evidence consistently points to the **high investment option** although those with (financial) vulnerabilities have more pressing priorities and are less likely to want bill increases to fund environmental initiatives - even if the bill impact is relatively small.





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Appendix



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Evidence score detail.

The evidence score is the sum of the 'Robustness Rating' and the 'Coverage Rating'

Robustness	Points
High: Best practice method demonstrated AND sample size proportionate (if applicable) AND high quality analysis & interpretation in report	5
	4
Mid: Minor reservations* on method OR less proportionate sample size OR some reservations on quality of analysis & interpretation	3
	2
Low: Major reservations on method OR very small sample size OR major reservations on quality of analysis & interpretation (i.e. bias) OR not customer-based insight	1

+

Coverage	Points
High: Highly robust coverage of Portsmouth Water region.	5
	4
Mid: Moderately robust coverage of Portsmouth Water region (sample / report may cover multiple regions)	3
	2
Low: No coverage of Portsmouth Water region	1

*Includes where report does not provide adequate evidence of method