



Portsmouth Water Future Customer Panel

Final Report
December 2022



A co-creative approach to engaging with Future Customers

- A 6-week process across 2 workshop days; attended by 20 x 6th formers from schools and colleges from across the region
- Immersive sessions about the company and sector; plus group discussions on specific issues
- Organised into 4 teams to work on a real business issue. Teams compete with a winning pitch presentation
- Supplementary evidence from a survey distributed to all participating schools



Future Customer Panel at Portsmouth Water

Day 1 (14th Oct 2022)

- 'Speed immersion' with Portsmouth Water experts & task
- Group discussion: the long term vision
- Task briefing: water resources challenge

Day 2 (11th Nov 2022)

- Task presentations plus Q&A with senior members of Portsmouth Water
- Group discussion - WRMP

Portsmouth Water Future Customer Panel: School survey

* Required

Introduction

1. Which of these applies to you? *

☐ In school year 12

☐ In school year 13

☐ Other

2. What is your gender? *

☐ Male

☐ Female

Schools survey

- Sent to sixth forms/colleges of students participating in the Future Customer Panel
- 227 students from years 12 & 13 took part
- Included questions about behaviours and attitudes towards:
 - Future plans / prospects
 - The environment
 - Portsmouth Water
- Fieldwork took place between 1-15th November 2022



Inside the lives of Future Customers: attitudes and water behaviour

Future customer response to the Vision statement

Future customer response to the WRMP 2025-2075

Summary of Future Customer response to long term ambitions (core task)

Conclusions

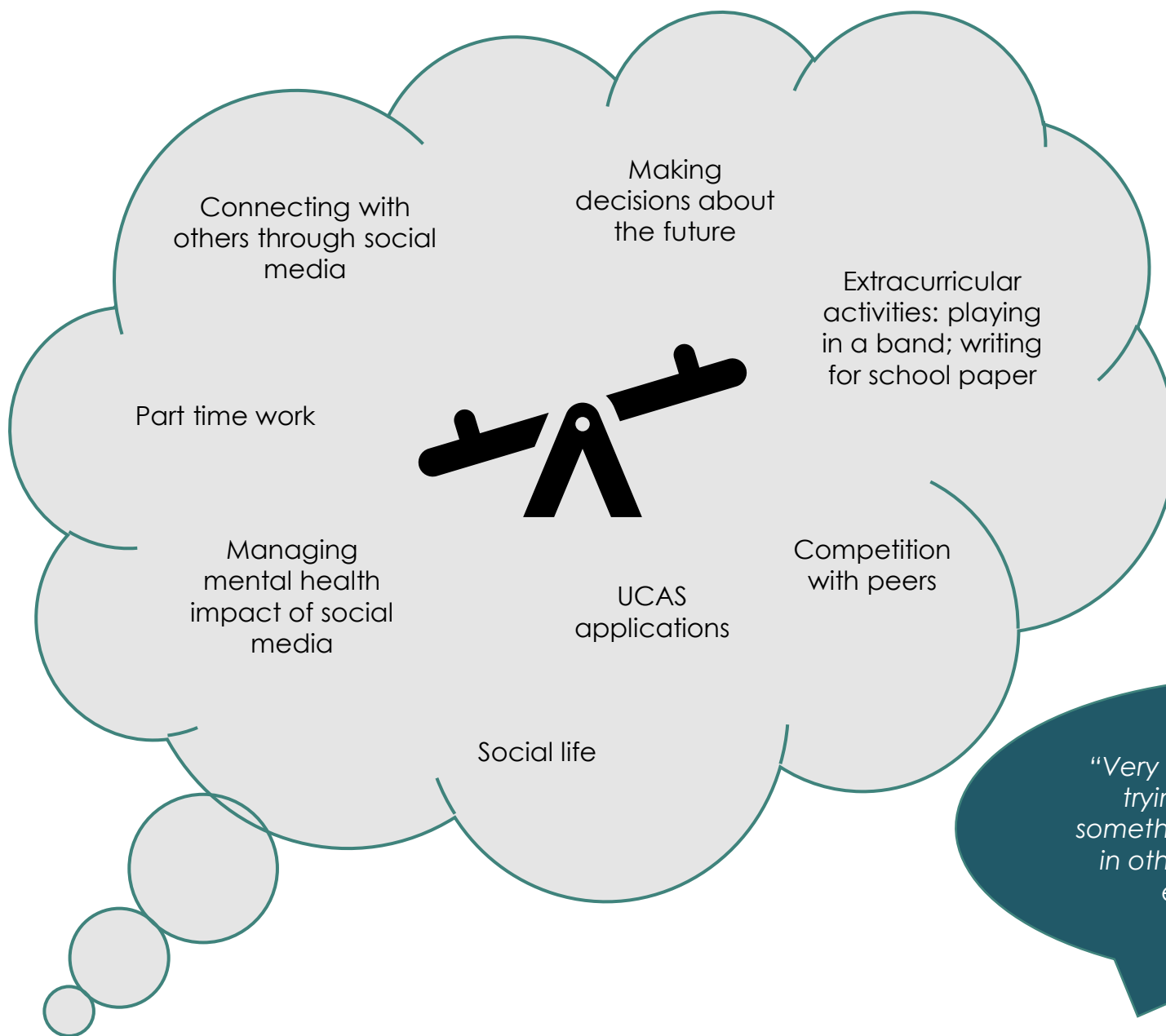




Inside the lives of Future Customers: attitudes and water behaviour



BLUE MARBLE



"Everything is dependent on how you do in these exams."

"I think I like having the internet...even if you don't go to the same sixth form as other people, you will still have connection...but it is a disadvantage as well because you can't escape."

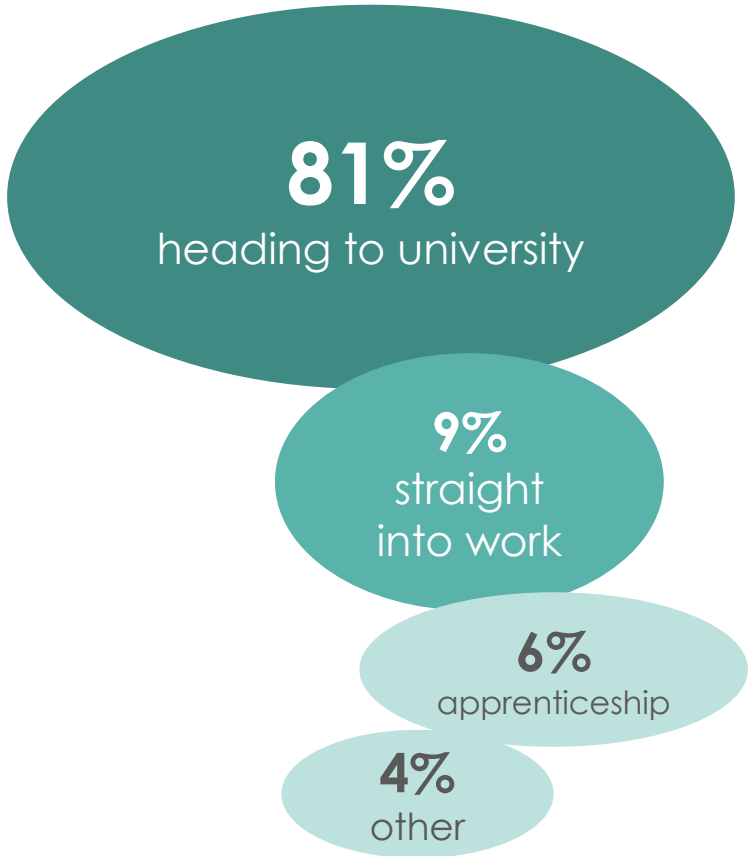
"Very competitive, you're all trying to be the best at something: academically and in other aspects like sports, extracurriculars."

"Thinking about what's happening next in life is stressful."



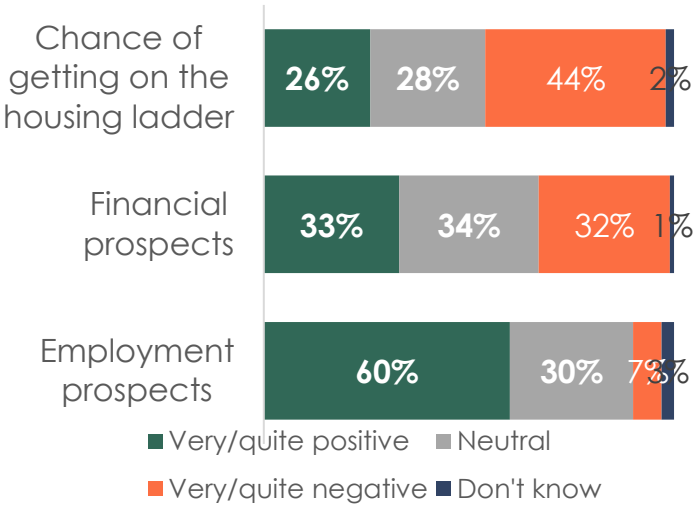
Most are looking forward to changes in their own lives with university on the horizon. However this is a worrying time too with lots at stake with exams, and some concerns about broader societal issues. Much higher confidence about employment prospects than financial outlook more generally – with home ownership a long way off.

Future plans (after year 13 or a gap year)



Q: What are you most likely to do after year 13 or a gap year? Base 227

Future prospects



Q: How are you currently feeling about the following issues in relation to life after education? Base 227

"There's so much pressure to become independent but it's becoming even more difficult as a young person."

Most mentioned societal concerns

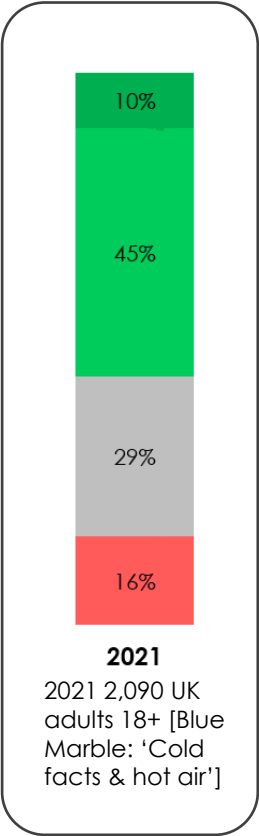
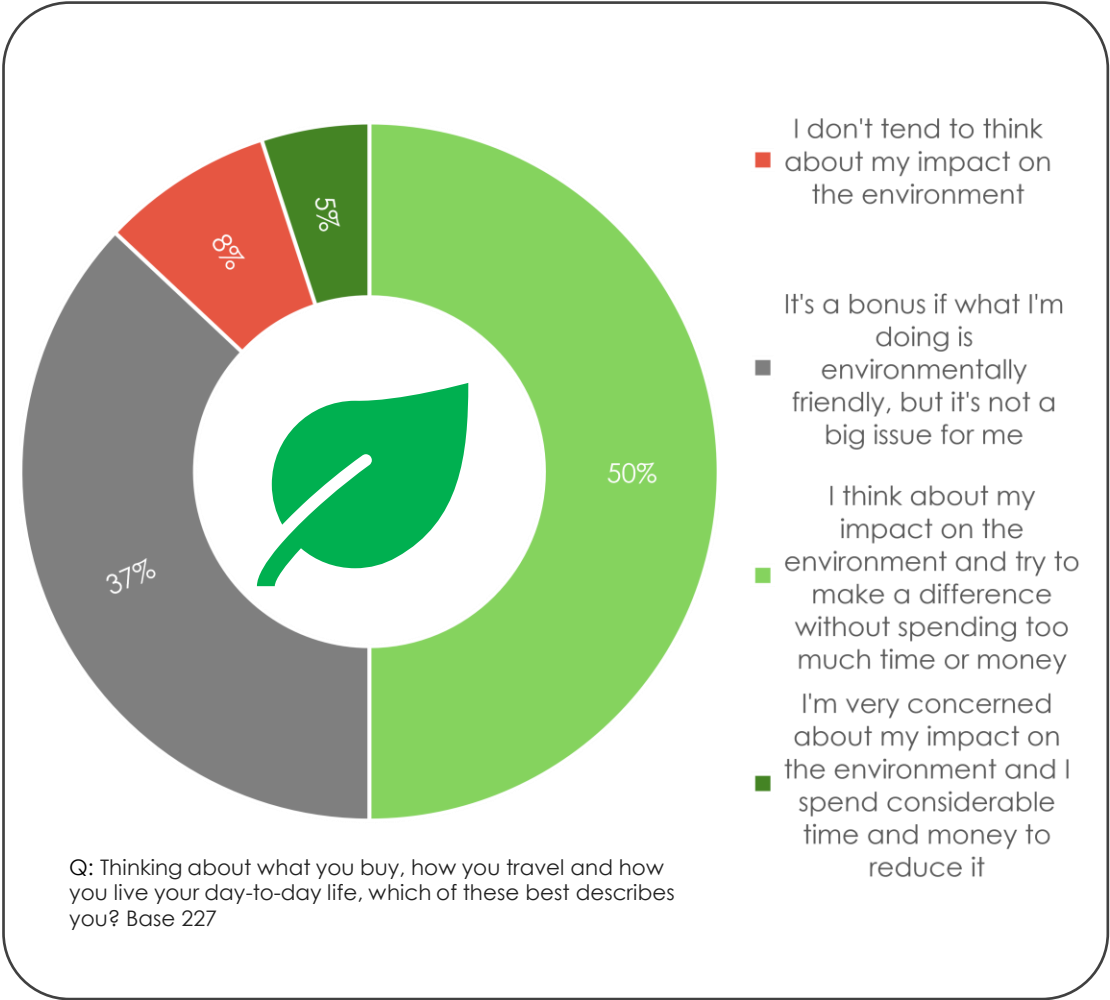
- Climate change
- The cost of living crisis and other economic change
- The impact of the pandemic (on mental health, the economy etc.)
- Survival/state of NHS
- Behaviour of corporations and the UK government (NB: research took place in the tumultuous days of PM Liz Truss)

"We do fear for the future."

"We need to get the Tories out."



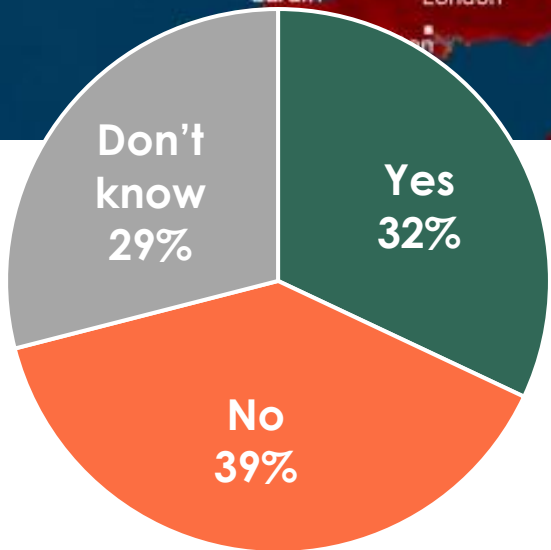
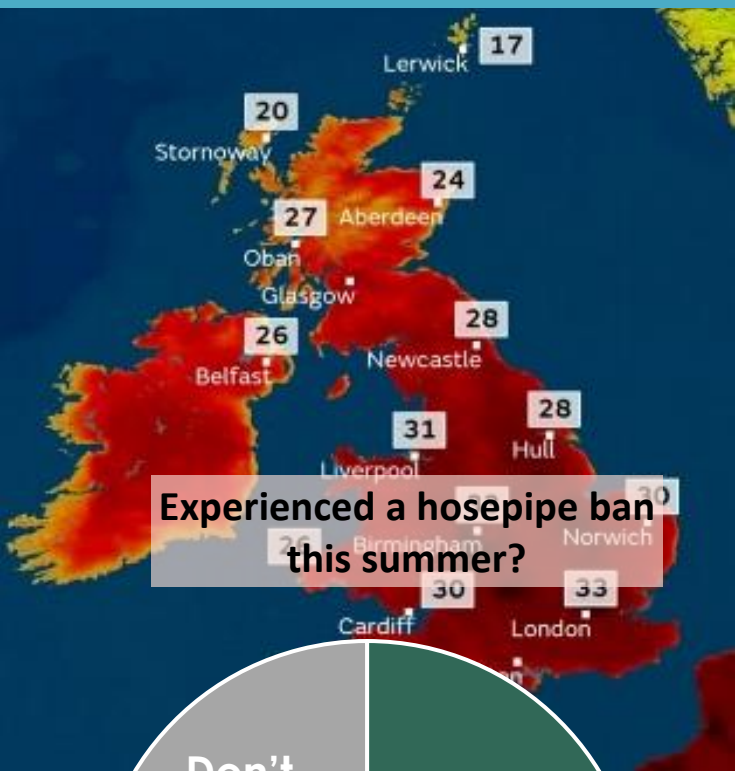
The majority of future customers care about their impact on the environment, and act accordingly, but only as long as it doesn't cost too much time or money. Comparing future customers with the adult population, they are less likely to hold 'dark green' views (the most concerned who minimise their impact on the environment); but also less likely than their adult counterparts to be ambivalent about their environmental impact.



In the qualitative group discussions, future customers placed the burden of responsibility for acting on climate change primarily with governments and corporations, rather than individuals.

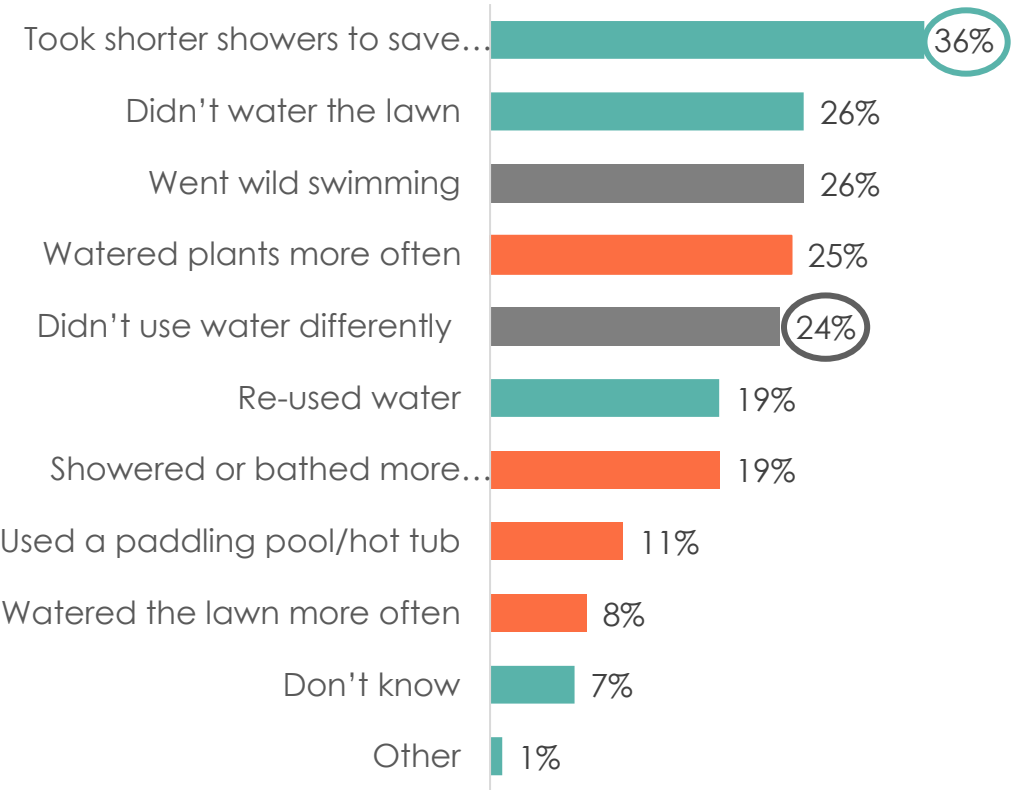
"The environment is in a really bad position...we're at our worst than we have ever been, carbon emissions skyrocketing."

"Corporations screwing over the environment and trying to cover it up."



A third were confident they had experienced a hosepipe ban this summer, with lack of awareness about this issue relatively high (29%)

Used water differently this summer?

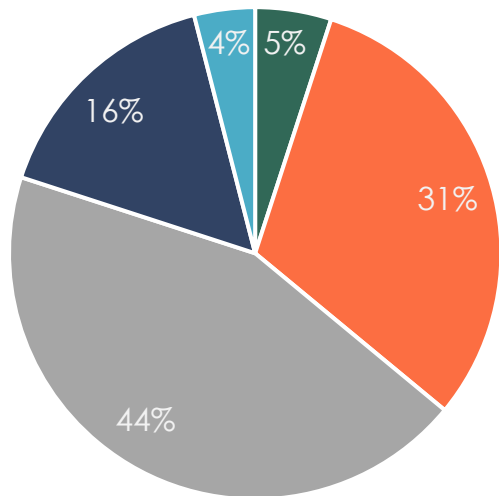


Over a third claim to have taken shorter showers during the hot summer period, and a quarter said they didn't water the lawn.

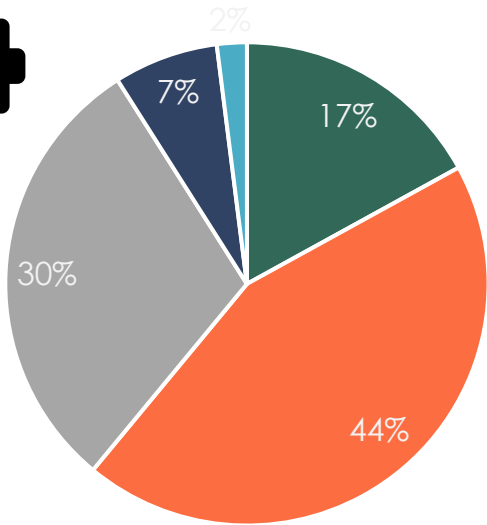
24% of future customers didn't change their behaviour at all during the hot weather period, reflecting a lack of knowledge about water scarcity issues as reflected in the qualitative group discussions.

Over the summer, several areas of the country experienced a hosepipe ban. Was there a hosepipe ban in the area where you live? Base 227

And please tell us in what ways, if any, your household used water differently over the hot weather this summer compared to a usual summer? Base 227



Thinking specifically about water: how much effort do you make at home to save water? Base 227



Thinking specifically about energy: how much effort do you make at home to save energy? Base 227

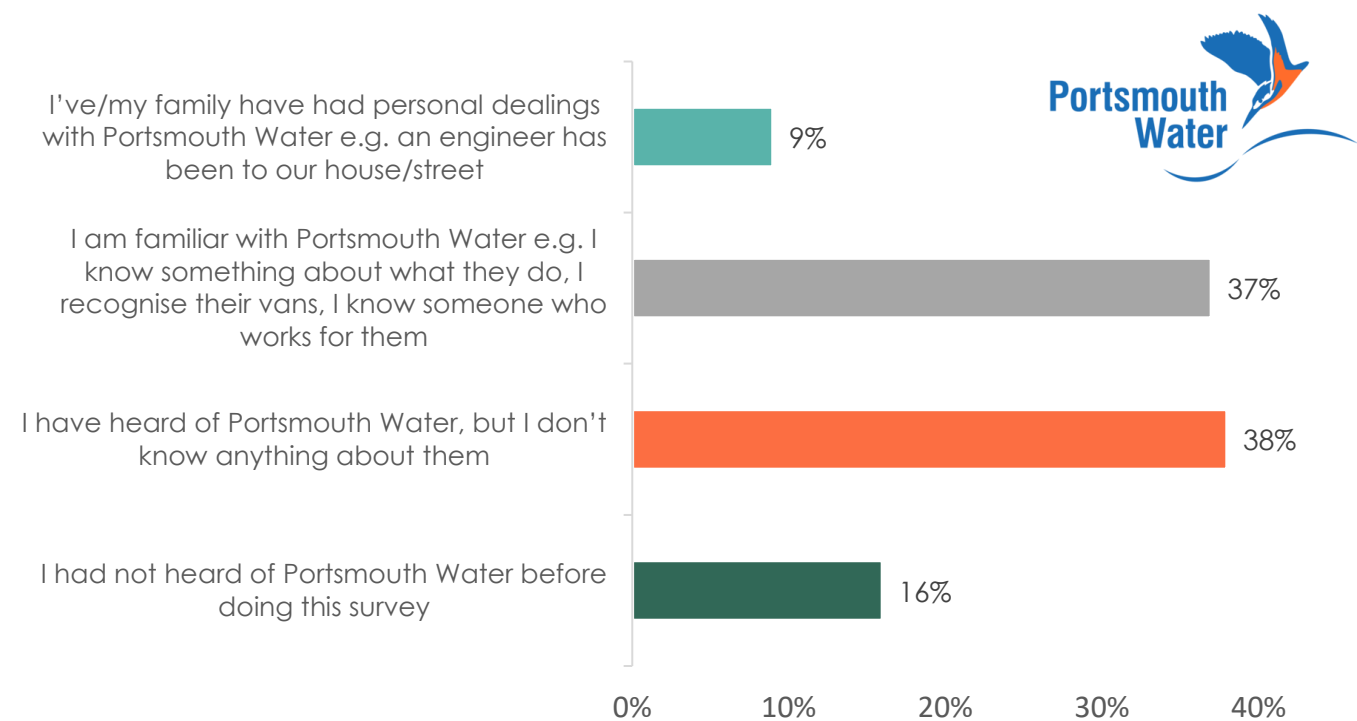
More of our survey respondents made effort to save energy at home than they did with water.

Energy was also top of mind for future customers, both as a societal issue (the “cost of living crisis”) and personally. Some described looking at energy smart meters and being mindful of the cost of their usage.

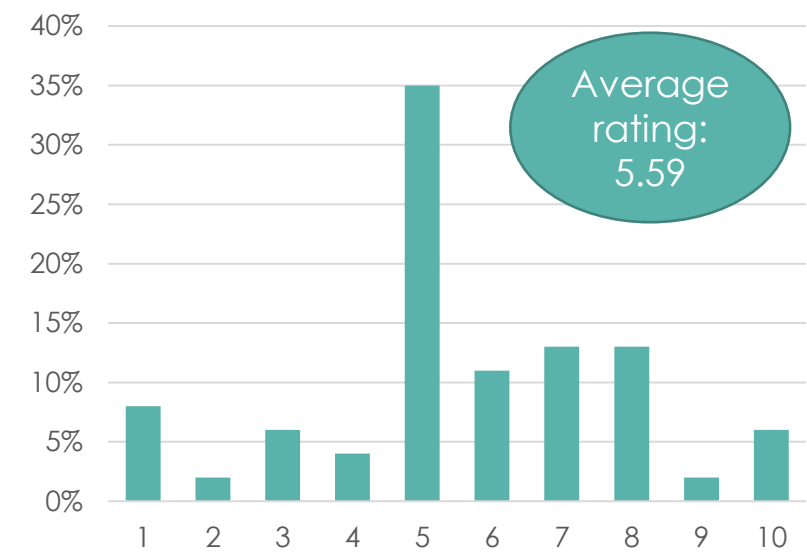
“All the prices going up and everything.”

“People are massively struggling with energy”

Survey respondents generally had low awareness of Portsmouth Water, and were moderately likely to recommend them to others as a good company



Which of the following reflect your awareness of Portsmouth Water? Base 227



How likely are you to describe Portsmouth Water as a good company to someone you know? Rate this from 1 (not at all likely) to 10 (extremely likely Base 227

One of our Future Customer Panel teams ran their own research that confirmed this low brand awareness, highlighting the small number of Google reviews that the company has, and noting that few of their peers recognised Portsmouth Water when asked who they were.





EXCELLENCE IN WATER. ALWAYS.

OUR 25-YEAR VISION PRÉCIS*

To achieve our 25-year vision, we must be ambitious and stretch ourselves. We need to embrace innovation and push the boundaries of our performance.



Future customer response to the Vision statement



BLUE MARBLE

Future customers could cite a handful of examples of companies who they admired – and could summarise the values they hold.



"It's good to see big companies like that actually putting millions of pounds into the issue itself."



"It's kind of cool because it's good for the environment, but it's also helping you."



"Leading the way with the future in mind."

Desirable company values



Keeping the customer front of mind



Adaptable to changing circumstances



Innovative and pioneering



Gives back to community e.g. charity work



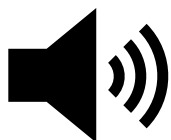
Environmentally friendly



Cares for employees



Customer communications, support for vulnerable people, and the environment were key concerns



Customers need to be made aware of and consulted on:

What their water contains inc. lead/chemicals

Portsmouth Water's future plans

Water scarcity issues and behaviour changes required to combat them

"It's important that people have access to safe water essentially."

"I know water isn't nearly as much as other costs but you still have people who are on their last legs."

Water was viewed by future customers as an essential right for all. Consequently they want Portsmouth Water to prioritise the following:



Clean and safe water



Supporting vulnerable customers struggling to pay their bills to ensure they have continued access to water



Innovating infrastructure used to treat/transport water (viewed as moving at a slower pace than technology such as phones and laptops)



Sustainability (ensuring biodiversity around Havant Thicket reservoir, encouraging recycling of water)



Secure sustainable water supplies for our customers, which protect and enhance our environment in a changing world



Reflecting
desired values:



What did our future customers think?

- ✓ **Universal smart metering:** an easy way to reduce usage, by making wastage more tangible.
- ✓ **Pinpointing leaks with AI:** sounds innovative, leak reduction is important.
- ? **Havant Thicket reservoir:** is biodiversity being protected on the site?
- ✓ **Investing in nature:** a worthwhile goal, with positive impacts on customers' health .



Response to time frames

- **Universal smart metering** and **pinpointing leaks with AI** seem like more quantifiable goals than those relating to the environment. Could they be achieved sooner?

"It's all positive, these are steps that need to be taken to improve everybody's lives and the ecosystem in general."

"When we're short of water...[smart metering is] a very, not easy, but easier way to reduce lack of water."

"It seems like some of it could be done now."



Be at the frontier of delivering high-quality, resilient, net zero services – for our customers, environment and region.



Reflecting
desired values:



What did our future customers think?



Improving resilience: positive if it reduces impact on vulnerable customers. Reassuring to know that water supply secured for the future. How does this differ from theme 1?



Generating more energy than required: how exactly will this work? Will the excess be sold or given away? Could the company utilise hydroelectric power?



Lead pipe replacement and **minimising chemical use:** important goals for customer health, but alerting people of the problem will alarm them: comms are important here. How safe is the water to drink right now?



Artificial intelligence to ensure proactive, preventative maintenance: how does this differ from theme 1?



Response to time frames



General questioning surrounding ambition of vision: could goals be achieved sooner? What's being done right now to work towards them?

"The lead one
could shock a few
customers."







Co-create solutions which deliver our customers', communities', and stakeholders' priorities.



Reflecting
desired values:



What did our future customers think?

-  **Water saving:** agree it's important to raise awareness of water resource issues.
-  **Smart metering:** need to financially incentivise people to accept devices, whilst also pushing environmental messaging. Care needs to be taken that vulnerable customers aren't negatively impacted.
-  **Markets for non potable water:** good to work with other organisations to make sure water isn't wasted.
-  **Customer support access and supply interruption promise to vulnerable customers:** morally desirable goals but "why weren't they making it happen before?". How will the customer service access work in practice?



Response to time frames

-  **Universal smart metering target:** too ambitious as some homes won't want the devices,

"Repetition can be positive because it emphasises the point, but at the same time it can be seen as filling out."

"Protecting future generations is good and something not many companies take into account."

"I would definitely pay an extra 2p for my 10 minute shower."








Affordable water for all. Always.



Reflecting
desired values:



What did our future customers think?

-  **Vulnerable customer support hub:** good idea but how will work? Is it online? How will the company know which customers are vulnerable?
-  **Social tariffs:** good to help economically vulnerable. What happens when people can't pay at all?
-  **Reinvest our rewards:** good if this benefits customers, but where exactly will the money go?
-  **Right investments at the right time:** too vague.
-  **Closer connection with customers:** "that's what we're doing here" (at FCP): will benefit business to educate more customers on key issues and allow them to give feedback on plans.

"Are they just saying this to make themselves sound better or are they actually going to do it?."

"If you're hearing from the consumer you're going to have the best kind of business because it's based on what consumers want."



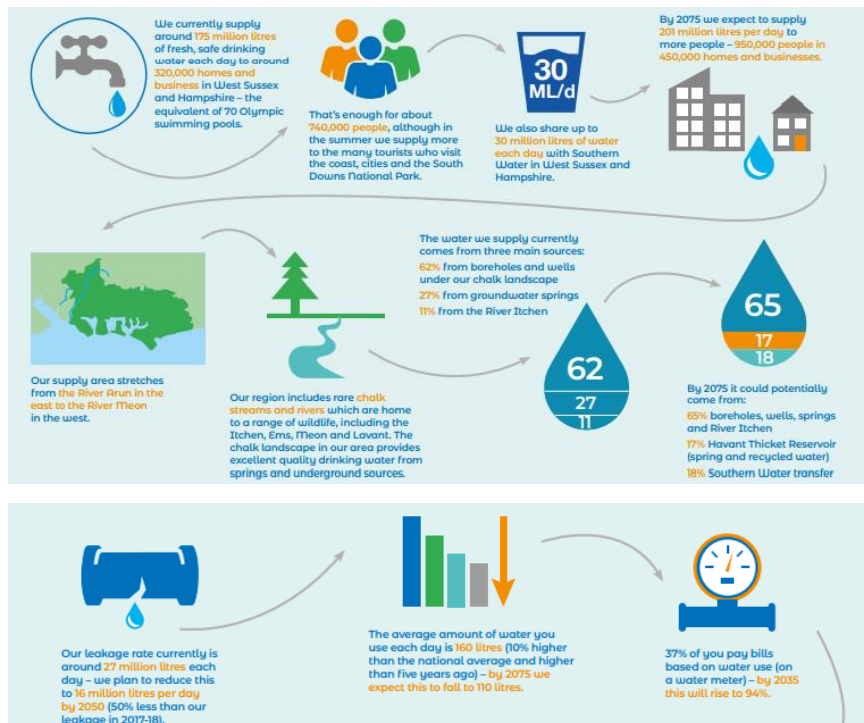


Future customer response to the WRMP 2025-2075



BLUE MARBLE

The Future Customer panel had already been briefed on aspects relating to the WRMP. This analysis relates specifically to their response to the (draft) consultation document.



- Fixing leaks and installing meters largely uncontroversial
- Reducing water consumption to 110 litres per day sounds hard: especially as people are unaware of the water scarcity problem
- Most questions concern the supply options:
 - recycled water: how does it work? Is water already recycled?
 - Some concern about water transfer
- At this point, unclear how PW will achieve all of this


"When it comes to having enough water it's concerning to rely on another company."

"For everyone to change it's going to be very difficult."

"Campaigning about the risks of continuing to use as much as we are - being direct about the issues we will face."



High level of support for this objective, though the 2075 timeframe seems too far out (with the 2050 ambition getting lost).




HALVING LEAKS

Finding and fixing more leaks on pipes is a priority for everyone. We're making significant reductions already and last year we had the second lowest leakage rate of water companies in England and Wales. We plan to reduce leaks by half* by 2050 and by another two per cent every five years until 2075.

We'll do this by:

- harnessing innovative ways to find the smaller, background leaks which are currently hard to trace with existing technology
- finding more leaks in customers' homes, particularly through our metering programme
- working with the industry to make sure new water mains are laid without leaks.



Do you support our plans to reduce leaks by half by 2050?

**SAVING
9.8 MILLION
LITRES PER
DAY BY 2075**

*The starting figure for our 50 per cent reduction in leaks is 32.38 million litres of water per day (2017-18 as set by Ofwat), so our target for 2050 is 16.19 million litres of water per day. We've already reduced leaks to 27 million litres.

Positive aspects



- Widespread support for reducing leaks
- States how this goal will be achieved
- Working with large businesses a good idea
- Good to see investment in new technology

Questions or concerns



- 2075 is a long way off – is it ambitious enough?
- Could be more specific about innovative ways to find small background leaks
- How disruptive is this plan (digging up roads)?

"I think saving water's always going to be important to our generation with the climate crisis."

*[Providing more detail]
"I think that would make it feel like more trustworthy."*

"2075 is a long way away, new priorities could arise by then displacing leakage."



Strong support for smart metering among Future Customers who are happy with the near term date of 2035



METERING FOR EVERYONE

We plan to install more than 200,000 smart meters at the homes of our customers between 2025 and 2035.

Homes which already have meters will have theirs replaced with smart ones by 2040 and overall we expect to fit a smart meter in 94 per cent of the homes we supply.

Water meters are considered fairer because bills are paid based on how much water is used, rather than on the rateable value of homes. Currently, only a third of the homes we supply have a water meter, the lowest percentage in the South East.

**SAVING
9.5 MILLION
LITRES
PER DAY
BY 2075**

Installing meters both at homes and across our network of pipes will give us more insight into where water is being used and make it much easier to find leaks and faults. Every drop of water we save means we need to take less out of our environment, treat it and pump it around – saving on bills, carbon emissions and protecting the environment.

We'll support our customers with leak repairs, water use audits and water-saving devices so they can save money directly on their water bills and use less energy to heat their water.

We expect metering will help to reduce water use by around 12 per cent – nearly 20 litres per person per day.

We're able to introduce metering for everyone after our supply area was reclassified as being 'seriously water stressed for metering' by the Government in 2021.

Some customers will see their bills increase so our priority will be making sure water bills remain affordable for everyone. We'll work with our customers and consumer organisations to introduce transitional tariffs and support for vulnerable households.



Do you agree 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)?



Do you support our plans to install meters at most homes we supply to encourage water saving and find more leaks?



Do you support the use of smart meters? (With the ability for customers to see their own water use and identify leaks)

Positive aspects



- Ultimately a fairer system
- Gives control to customers to use and spend less...
- ... as long as people are well informed
- Strong support for smart meters specifically
- Goal appears realistic/reachable

Questions or concerns



- Need to communicate why meters are a good thing
- And don't disadvantage the digitally excluded
- Concerns about larger families being financially worse off: want to know more about transitional tariffs

"Basing bills on how much you use is definitely a better idea."


"...everything is going up and up and up and it's quite alarming at our age. I think any way that we can be eco friendly and save our money is good."

"I don't see a downside to people being more aware of what they're using."

"Focus on affordability is good - making sure everyone can afford to go on a water meter."



Future Customers see this as a difficult challenge and repeatedly talk about the importance of (good quality) education




SAVING WATER

Working together, we plan to support you to save by taking simple steps to become more water efficient, particularly as you're able to learn more about your water use with a smart meter.

Our plan includes:

- A community reward scheme for homes through the online GetWaterFit programme

SAVING 14.1 MILLION LITRES PER DAY BY 2075



- Home water audits as customers switch to a smart water meter
- Home audits for identified high water users
- Offering water-saving devices, such as showerheads and toilet fittings
- Audits and support for schools and colleges and leak detection for hundreds of high water-use businesses
- Online audits as part of the GetWaterFit programme for businesses.

Positive aspects



- The number of ideas/resources is good
- Financial incentives will motivate
- Education is key (none had experienced this themselves at school)

Questions or concerns



- 'Audit' unfamiliar... a home check?
- Audits involve strangers coming into the home – not good for some
- Audits more suited to businesses than homes
- Get Water Fit will need improvements (see next section)
- Don't panic people: need to communicate calmly


"I'm wondering what kind of person would say no to that: someone who doesn't care about the environment at all."

"We've learnt a lot over these past two meetings...education is really really important when it comes to these things."

"Say: 'we have a plan but we need your help'."



Positive response to water labelling – though they don't feel in the market (yet) for the types of goods this relates to



WATER LABELLING

Our plan assumes the Government will introduce compulsory water labels by 2024 for white goods, such as washing machines, dishwashers, toilets and taps.

The labels would show how water efficient the goods are – similar to energy efficiency ratings – and would help consumers make informed choices.

The Government estimates this could reduce water use by 1.2 billion litres a day in the UK in 10 years, as well as save households £125 million on water bills.

We also expect the Government to set a minimum standard for devices which use water and strengthen water regulations to improve water efficiency in new homes.

SAVING 22.3 MILLION LITRES PER DAY BY 2025

Positive aspects



- Strong appeal for this: a 'no brainer'
- 2024 target is good – promising change soon
- Some familiar with energy efficient labelling – easy to understand
- Would impact choice when buying goods

"It is appealing to be aware of how much water things use – it forces designers to think about it."

Questions or concerns

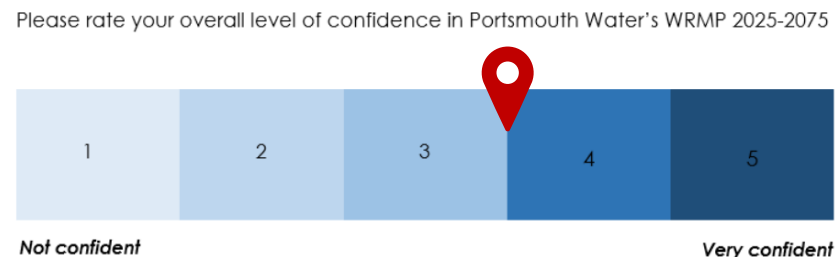


- Want a graded quality rating (not just efficient or inefficient)
- Rating needs to be accessible for all to understand
- Needs to relate to quality too: a low quality but efficient appliance will ultimately lead to wasted resources

"Water efficiency labelling would be an easy thing to implement and people could easily understand it."



Future Customers give the WRMP an overall confidence rating of 3.5 out of 5



- ✓ Good to be planning for the long term
- ✓ Reasonably ambitious
- ✓ Good general principles
- ✓ Good environmental impact
- ✓ Protecting customers from increased bills (meters)
- ✓ Good for reducing usage/demand

BUT

- Be more ambitious with leak reduction
- Need to watch the cost of bills
- Need to follow through (do it not just say it)
- Need to keep customers informed, update progress
- Give more detail on 'how'?
- Don't neglect the present in striving for long term goals








Summary of Future Customer response to long term ambitions (core task)



BLUE MARBLE

THE BRIEF: targets to achieve lower PCC

Teams were briefed on their core task which was to consider Portsmouth Water's strategy and targets to lower PCC. They were asked to look at each aspect using desk research of energy smart meters; taking water saving devices home to test in a real environment; and to think creatively about communications.

Strategy	Target	Assumption re water reduction: overall reduction of 8.5 megalitres per day
Smart meters 	<ul style="list-style-type: none"> Universal – every household to be metered by 2040 Provide monthly water use data Target households with increasing consumption 	<ul style="list-style-type: none"> 5ML (60% of reduction)
Devices to help & Get Water Fit 	<ul style="list-style-type: none"> Get Water Fit: an online tool offering free devices and advice to save water (and money if metered) https://www.getwaterfit.co.uk/#/ Achieve 25k registrations per year (Improve return traffic to the site) 	<ul style="list-style-type: none"> 0.4ML (5% of reduction)
Communications 	<ul style="list-style-type: none"> Broadcast communications seen by 25% of Portsmouth Water customer base (Portsmouth Water has 700k customers) 	<ul style="list-style-type: none"> 2.1 ML (25% of reduction)

TEST THE STRATEGY & ASSUMPTIONS

Desk research task



Will smart meters lead to behaviour change?

Experiential task



How effective will the devices be?

Creative task



What messages would you lead with?

Then provide your team's assessment on PWs assumptions

Which would you prioritise – why?

Are the ambitions too high / low / about right why?

Acknowledging some concerns about parts of society who may be unhappy about smart meters, Future Customers support their introduction tending to think the ambition is potentially too slow

Will smart meters lead to behaviour change?



- Universal – every household to be metered by 2040
- Provide monthly water use data
- Target households with increasing consumption

5ML (60% of reduction)

Where Future customers see the challenge

- Key statistic quoted is that 46% of UK households think they use 20 litres per day. Hence the strategy needs to reflect the starting point: very low appreciation of what we use and why we need to change our habits
- Smart meters can create anxiety and excessive monitoring with elderly or low-income households if they're constantly reminded of what they're spending
- There's no guarantee that customers save money – concerns about poorer families seeing increased bills
- Smart technology is inaccessible for some in society
- Without strong communication, people unable to see or reap benefits

What Future Customers think you need to do to achieve the goal

- Education on the need to save water – then the advantages of meters/smart meters
- Using real time data to keep customers informed about their water usage (via an app)
- Create positive motivations especially on cost (in a cost of living crisis).
 - Don't just link to environment: this doesn't motivate everyone
 - Provide tailored analysis e.g. savings over a day/year
 - Visualise amounts e.g. used in bath: if able to physically understand use, will use less.
 - Show water peaks/high usage; set targets to monitor (and reward) change.
 - Compare water usage to others in region.



Targets undermined by poor experience of both the products and GWF tool

Experiential task



What messages would you lead with?

- Get Water Fit: an online tool offering free devices and advice to save water (and money if metered)
<https://www.getwaterfit.co.uk/#/>
- Achieve 25k registrations per year
- (Improve return traffic to the site)

0.4ML (5% of reduction)

Where Future customers see the challenge

- Getting more traffic to Get Water Fit may not achieve that desired aim: task revealed problems with both the site and the free devices which will hamper return traffic
- Usability and the data provided were not intuitive
- Mixed experiences with the devices
 - Showerheads can be an improvement on what went before – though also reported to be noisy, incompatible with fitting, and for one household it broke
 - Tap inserts – mainly incompatible/only work with detachable heads
 - Buffaloo – not compatible with dual flush systems (or where cistern lid isn't removable); and for one, damaged and unusable
 - Leaky loo – did its job and found a leak!

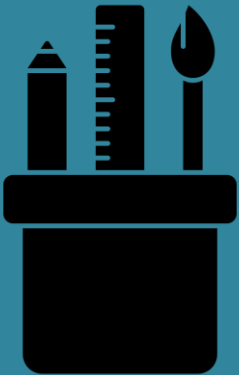
What Future Customers think you need to do to achieve the goal

- Improve GWF website navigation
- Give information about how that data is calculated from the information you put in as a customer
- Make variations of appliances to fit different types of taps/showers
- Use more durable materials e.g. for the save a flush bag: make it out of a firmer plastic
- Provide clearer instructions (or any instructions!)



The importance of clear and effective communication with customers was the strongest theme emerging from each presentation. Future customers highlighted various areas for improvement.

Creative task



What messages would you lead with?

<ul style="list-style-type: none">Broadcast communications seen by 25% of Portsmouth Water customer base(Portsmouth Water has 700k customers)	2.1 ML (25% of reduction)
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Where Future customers see the challenge

- Future Customers were critical of Portsmouth Water’s social media offering, which they highlighted as **inactive** and **inconsistent**.

What Future Customers think you need to do to achieve the goal

- Education: the FCP had learned a lot of new information from the experience, e.g. future supply risks
 - Need to educate younger generation to adopt good water usage habits to take into adulthood.
 - Visits to schools were seen as a key
- Social media another important educational tool that can broaden people’s awareness of various issues.
 - Social media platforms are generational: accounts on Instagram and TikTok are best placed to reach future customers (who get most of their information this way), Twitter is useful for daily updates and Facebook has a broad reach.

How should it be presented?

- Use reels and trends
- Post regularly
- Introduce a consistent and recognisable format in posts
- Use professional photos and stats
- Find current trends
- Staff share

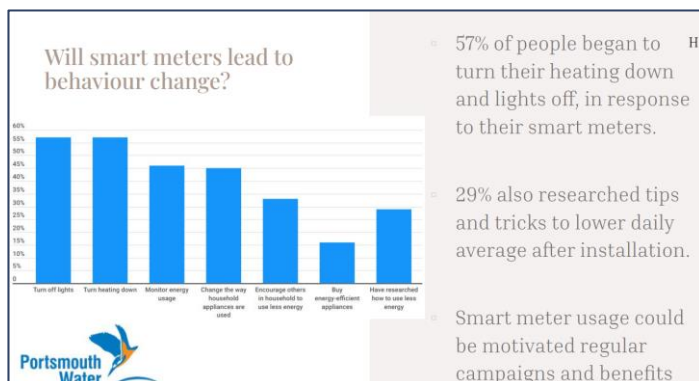
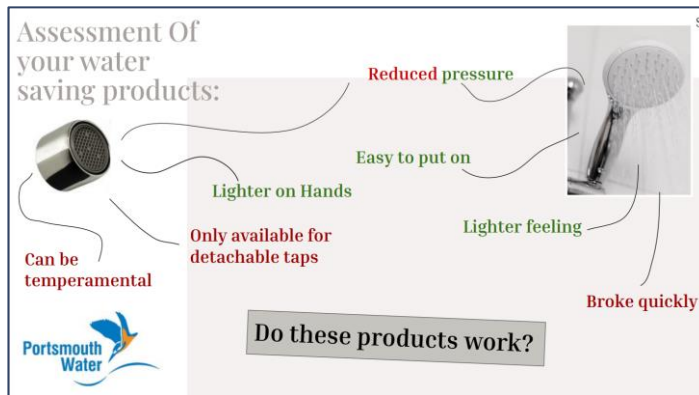
Topics they want to see:

- Construction updates
- Saving water tips (important during a financial and environmental crisis)
- Day to day running of company
- Engagement with influencers

“You wouldn’t think that teenagers want to learn but we do.”

“The [PW] insta is practically dead.”





- Team strongly supported smart meter roll out targets, citing evidence from energy smart meters that have reduced used significantly
- But they also feel the key issue for PW is how it communicates the roll out to customers
- Critical of the water saving products: both in terms of driving awareness and the customer experience – question the target
- Low number of Google reviews and response from survey conducted in one school reflect low online presence
- Criticism of ambitious communications target: 170k followers is unrealistic. They recommend doubling followers over in a couple of months and then review every 6 months or so
- Team reflected on vision statement: they see admirable goals and customer at forefront. But they challenge: if customers don't know/see PW, how can they be engaged?





How Portsmouth Waters can maximise effectiveness of Get Water Fit

1. Make the website easy to navigate.
2. Give full breakdowns of how water is being used and what the data means.
3. Give information about how that data is calculated from the information you put in as a customer.

GetWaterFit

- Support for smart meters – but raise need for education (citing 33% of energy smart meter households say they have not saved them money)
- Also raise need for inclusivity and accessibility of the technology – and that low income families are protected from price increases
- Water efficiency devices need improving for optimal effectiveness (more durable etc.)
- GWF site is lacking more motivating information e.g.
 - A good visual representation of where money is going
 - Free devices more prominent
 - Personal charts difficult to interpret
- Team advise investing in a mascot to personalise communications – or bring the kingfisher to life to represent PW
- Develop an effective social media campaign: Utilise hashtags and trends; use the most popular social media such as TikTok or Instagram; post regularly to increase chances of reaching people; post relevant and educational content helpful for all followers





Portsmouth Water Presentation

By Team Fratton Park

INTERVENTIONS AND ALERTS

- What messages can we send to people to keep them on track?



TYPES OF DATA

Immediate Data

- Daily cost of water usage
- Levels of water usage across the day
- Distance to a daily set target

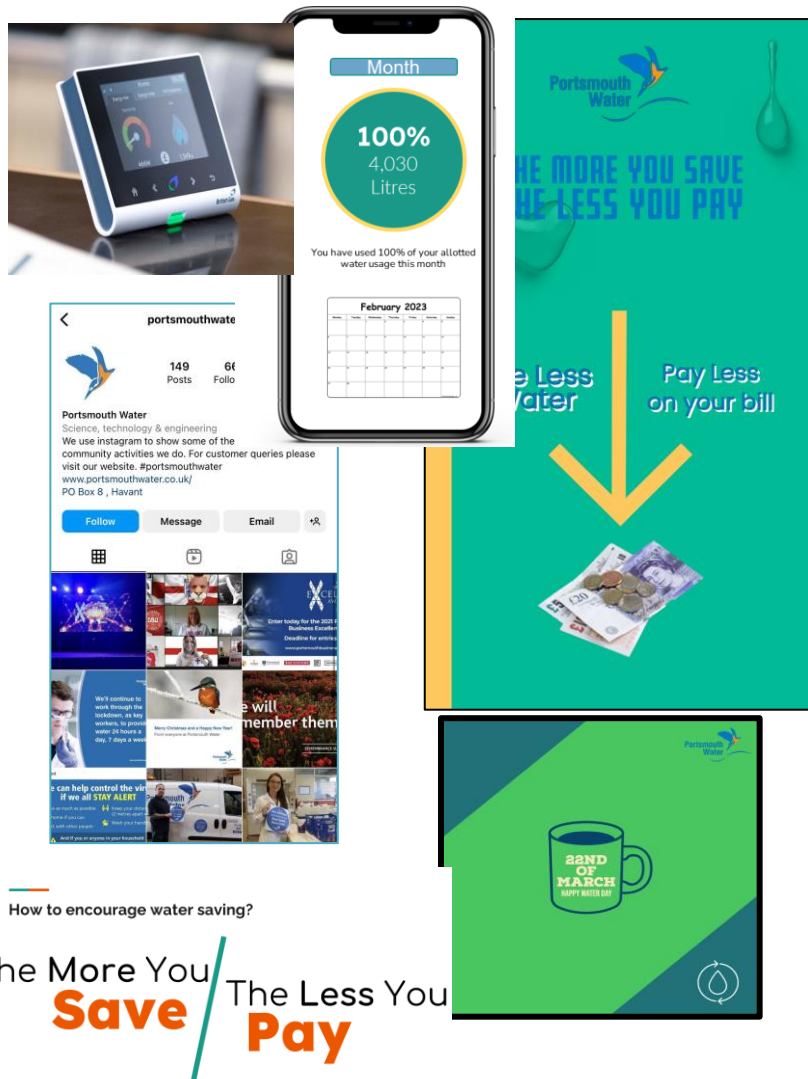
Long Term Data

- Comparisons between time periods of personal water usage
- Comparison against regional average water use
- Long term count of total savings since using the smart meter



- Metering target seems ambitious: achievable if customers understand the benefits and are more educated about metering
- Smart meter data needs to be immediate (real time) and over long term (trends) – via an App
- People will require positive nudges and 'negative' feedback – given via alerts
- Motivating data: daily cost of water usage; where water peaks; use against a set target; comparisons between time periods; comparing to others in region; total money saved
- Also offer financial incentives for behaviour change: vouchers rather than money off bills; add up over course of year and equivalised to other costs e.g. fuel.
- Mixed reviews of devices (similar to other teams)
- Support for more imaginative social media campaigning to attract younger audience: TikTok, Insta and FB (Meta)





- Metering research included issue of difficulty selling homes with meters (misperception?)
- Plus same statistic as previous team: 33% of energy smart meter customers claim it has not been cost saving
- Higher PCC than Germany suggested to this team that the issue is 'less about water meters and more about educating customers'
- They support an in home monitor – a 'mobile app!' with easy to read personalised information
- Also recommend a campaign based on money saving: households with a lower than average bill receive a discount
- The describe the social media presence of PW 'lacklustre' e.g. Twitter is 'very automated'
 - Remove the daily tweets about being available to help and post construction and leak notices
 - Insta inactive since July 2021: use for updated and promotional material – and use relevant hashtags
 - Celebrate occasions e.g. National Water Day



- Overall sentiment towards the **Vision Statement** was positive and the goals desirable. Future customers feel reassured that water companies plan so far into the future. Especially positive feelings surrounded the themes of: caring for customers and the environment, as well as the optimistic, comprehensive and forward-thinking nature of the plans.
- Future customers had concern surrounding feasibility: many questioned if the vision is too ambitious/how exactly its goals will be achieved, whilst some think it doesn't go far enough, and that the goals highlighted raise questions about why action has not been taken sooner.
- Future Customers are cautiously positive about the **WRMP**: the intent is good but the long term nature of these plans raises questions about whether aspects will ever be achieved – and specifically they want to see a more ambitious timeframe for leak reduction.
- Targets to reduce PCC** are challenged by Future Customers. Underpinning meter rollout and take up of devices is a strong communications strategy. They see no evidence to date that the company has these capabilities.
- Future Customers consider the needs of **vulnerable customers** as a matter of course: they want to see Portsmouth Water being cost conscious and supporting customers who might be disadvantaged by these plans.



A very positive experience for local students – even the fire alarm...

DAY 1 score: 8.3 / 10

- ✓ Informative/educational
- ✓ Engaging, fun
- ✓ Well facilitated
- ✓ Its purpose: views of future customers
- Some over-long activities
- More moving about/interactive/practical tasks
- More advance info on the day



DAY 2 score: 8.4 / 10

Overall benefits

- ✓ CV/UCAS
- ✓ Make great friends /new people
- ✓ Public speaking experience
- ✓ Teamwork experience
- ✓ Incentive payment
- ✓ Reflects well on PW
- ✓ Well structured, organised



Shows a sensitive company

Shows a forward thinking company

Shows they are passionate about the environment

Felt listened to, opinions taken into account

Treated like adults





BLUE MARBLE

www.bluemarbleresearch.co.uk



60. PW Future Customer Panel 2022 Report FINAL Dec 2022

Standards for high-quality research:	How addressed in this project:
Useful and contextualised	This project forms part of Portsmouth Water ongoing research with future customers (alternating this initiative between South Staffs and Cambridge Water regions). The 2-day event is designed with multiple purposes: to engage with local schools and colleges providing work experience opportunities for 6 th formers; to engage this cohort of future customers in the water sector and seek their views on a given brief (e.g. future investment plans); and to understand the perspective of young people more broadly in order to embed different generational perspectives into all aspects of its operation.
Fit for purpose	<ul style="list-style-type: none"> • Clear objectives that sat within the wider research and engagement programme agreed at the outset • This initiative samples future customers by promoting the FCP across the region's schools and colleges. It is usually oversubscribed so we ask a set of questions in order to select a broad range of students. • The 2-day programme includes a mix of activities some of which are very research-based e.g. group discussions; some more co-creative involving input from company executives. The project also involves circulating a survey to all participating schools/colleges to include the views of a much larger group of students on a number of key metrics. • The samples are self-selecting rather than purposefully samples against a set of quotas, which we acknowledged in the analysis. • We draw all these activities together into a report designed to supplement other future customer research.
Neutrally designed	Blue Marble designs the programme including the discussion guides, discovery activities, stimulus materials and survey. These are all designed with impartiality.
Inclusive	We ensure that we engage a wide range of schools across the region aiming to encompass areas of high deprivation and different ethnic and cultural profiles. In our selection process we ensure diversity in terms of gender, school/college and ethnicity (shown in the sample detail). All travel costs are paid and participants receive an incentive payment.
Continual	Part of the business-as-usual research programme
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

