Synthesis and Triangulation workstream

Report 2: May 2022

About the synthesis

Initial synthesis of research reports

Audience profiling

Ongoing synthesis of research reports

Quarterly reporting

Q4 | Q1 | Q2 | Q3 | Q4 | Q1 | Q1

Design Evidence Register

Add to Evidence Register
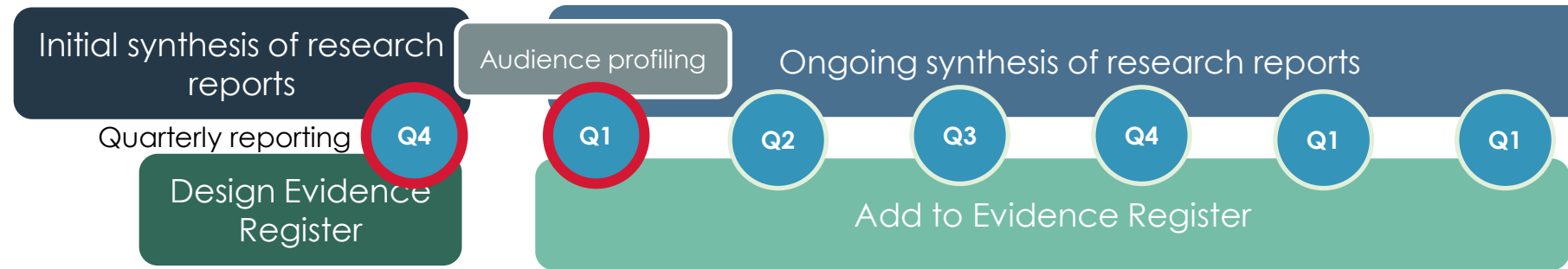
This is the second report for the Triangulation workstream and builds on the work completed in Q4 2021

- The purpose of this workstream is four-fold:

  1. To capture, systematically, all consumer data and insight relating to the 'Big Conversations' (including research commissioned by PW, WRSE puts and other published sources)
  2. To identify where there are gaps in PW's evidence base. Gaps can then be reviewed on a regular basis to inform planned and additional research briefs
  3. To start the process of triangulation early, applying a weighting to every evidence source at the outset
  4. To provide a clear framework to pinpoint where customers and consumers have shaped the business plan

- This is an ongoing process. A snapshot of the Evidence Register is available to view at anytime though it is a dynamic and changing document so Blue Marble will hold the 'Master'. We will issue quarterly summaries throughout the planning period.

Audience profiling

To be completed in early 2022

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Initial synthesis of research reports

Design Evidence Register

Methodology:
1. We participated in workshops and meetings with the PW team to understand the strategic objectives. These are reframed in language reflecting the 'Big Conversations' to have with consumers
2. The 'Big Conversations' are the starting point for a structured codeframe to log evidence systematically
3. We reviewed 10+ reports against the draft codeframe, finetuning the sub-themes under each Big Conversation. We now have a fixed set of codes.
4. The design captures details around the method and coverage of each report; and is structured to capture differences by customer segment (NHH, HH, Vulnerable, Future, Stakeholder)
5. Each report is assessed for its role in the Golden Thread, highlighting how insight/data is influencing the business plan

METHOD AND COVERAGE

METHOD	METHOD NOTES	AUDIENCE(S)	GEOGRAPHIC COVERAGE	TOPIC FOCUS	INFORMED?	OVERALL SAMPLE SIZE	PW REGION SAMPLE
1. RESEARCH – Qual		1. Households	area)	3. Solely PW focus	1. Uninformed	WRITE IN	WRITE IN
2. RESEARCH – Quant		2. NHH	2. PW – all	2. Primary PW focus	2. Informed during exercise		
3. ENGAGEMENT – Qual		3. Future	3. South East (incl PW)	1. Seconday PW focus	3. Previously informed		
4. ENGAGEMENT – Quant		4. Vulnerable	4. National (incl PW)	0. No specific PW focus	4. Not specified		
5. SECONDARY		5. Stakeholders	5. Other (write in)		5. NA		
6. OTHER (Write in)		6. Retailers	6. NA				
7. NONE		7. NAVs					
		8. NA					

GOLDEN THREAD	TOPICS (BIG CONVERSATIONS). USE LETTER CODES AND WRITE IN ANY ADDITIONAL SUB THEMES					
STAGE	1. Needs, concerns and priorities?	2. Long term water supply	3. (Smart) metering	4. Infrastructure investment now	5. Interactions with PW	6. Options for economically vulnerable
1. CONTEXT (Already know)	(a) Core services	(a) Chalk streams / abstractions from sensit	(a) Universal metering	(a) Impact of climate change / net zero	(a) Channel preference	(a) Social tariff
2. VALIDATION (Confirming previc	(b) Support	(b) Water recycling	(b) Smart meters	(b) Inter-generational fairness	(b) CRM Innovation	(b) New support structures
3. SHAPING (Developing previous	(c) Community	(c) (Havant Thicket) Reservoir	(c) Per capita consumption / c	(c) Level of investment	(c) Billing platform	(c) Water poverty
4. INCLUSION (Checking consiste	(d) Environment	(d) Water sharing (transfer)	(d)	(d) Lead pipes	(d) New service model	(d) Watersure
5. ACCEPTABILITY (Plan testing)	(e) Efficiency	(e) Desalinisation	(e)	(e) Affordability in general	(e)	(e)
	(f) Water quality	(f) customer behaviour change	(f)		(f)	(f)
	(g) Wider concerns (state of the nation)	(g) supply vs demand generally	(g)		(g)	(g)
		(h) Leakage				
		(i) Drought risk				
		(j) Use of green energy to power initiatives				
		(k) Catchment management measures				

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1	Customer Engagement and Triangulation PR19 summary
2	Customer Preferences to Inform Longterm Water Resource Planning Synthesis of Findings –
3	Customer Preferences to Inform Longterm Water Resource Planning Part A Evidence Review
4	Customer Preferences to Inform Long-term Water Resource Planning Part B Deliberative
5	Customer Preferences to Inform Long-term Water Resource Planning Part C Customer Survey
6	Semiotics Brand Exploration
7	Yonder Clockface Initial analysis August 2021
8	Water Futures 2050 future customer insights Sept 2021
9	Water for Life Hampshire: 3 research documents 'Introductory email; Water options survey and
10	WaterVoice Views of current customers on water resources. Summary report
11	Public views on the water environment
12	Household customer complaints about water companies ccwater.org.uk
13	Water Matters: highlights report 2020
14	ICS Business Benchmarking Portsmouth Water July 2020
15	2021 Service mark – Assessor Report 2021
16	ICS Who do you trust April 2021

REPORT 1 (Nov 21): We reviewed 16 reports commissioned or written by Portsmouth Water, Southern Water, CCW, ICS, Ofwat or WRSE.

17	Water Futures 2030 – November 2021 – Metrics for priorities
18	Water UK Omnibus Research Report Dec 2021
19	Water Recycling engagement strategy Nov_30_2021
20	Water Futures 2030 – Feedback on Regional Plan Feb '22
21	Public Attitudes Towards Smart Water Meters
22	**Portsmouth Water Foundational Qualitative Research**
23	Southern Water	Water Futures 2050 Panel	Wave 6 Feedback on WRSE plans
24	Southern Water	Water Futures Business Panel	Pilot wave Feedback on WRSE plans
25	**Portsmouth Water Stakeholder research: Business plan priorities**
26	**Portsmouth Water Barometer Wave 1 Report**
27	Southern Water Expert Insight Panel Report; SUSSEX, KENT, HAMPSHIRE AND ISLE OF WIGHT
28	Southern Water Reputation Deep Dive
29	Southern Water Image & Reputation Research Report
30	Southern Water Youth Panel
31	Southern Water Early Priorities Research
32	Understanding customers' preferences for Performance Commitments at PR24

REPORT 2 (May 22): synthesis now comprises 32 reports with important additions of Portsmouth Water's own research (bold).

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The **Synthesis and ongoing triangulation** includes a wide range of reports drawing on a variety of research and engagement methods across different audiences. These are both larger and smaller scale, and may have varying degrees of rigour in terms of design, analysis and reporting.

We use a two part report evaluation framework to assess: a) the validity / quality of each source overall and b) the relevance of the higher quality reports to the specific Big Conversations.

a) Assess validity / quality of each source

The **evidence score** indicates the overall quality of each source. It is based on the Blue Marble Executive team's appraisal of report **Robustness** and **Coverage.** A maximum score of 10 signifies a highly robust and credible report that has comprehensive coverage of consumers in the Portsmouth Water area. Lower scores indicate reservations in terms of design, sample size or interpretation within the report, or where the report has lesser (or no) coverage of Portsmouth Water consumers.

Further detail of the rating scales are in the appendix.

10 = Highly robust and credible for PW area

b) Assess relevance to each Big Conversation

As part of ongoing **Triangulation**, we also evaluate, for each higher quality report, how **strongly relevant** it is to informing the customer view on each Big Conversation. This is based on the Blue Marble Executive team reviewing objectives and findings in each report

Those which are explicitly designed with a strong focus are designated as '**Primary**' sources for each Big Conversation and thus will have highest weighting in Triangulation. Those where there is a lighter focus are designated **secondary** and are likely to be used as supporting evidence in Triangulation (e.g. helping develop a narrative to further understand Primary evidence).

PRIMARY: High quality report which is strongly focused on answering specific Big Conversation

SECONDARY: High quality report which is only partially focused on specific Big Conversation

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Updated synthesis report

As of May 2022, Conversations 1,2 & 3 have dedicated high quality evidence.
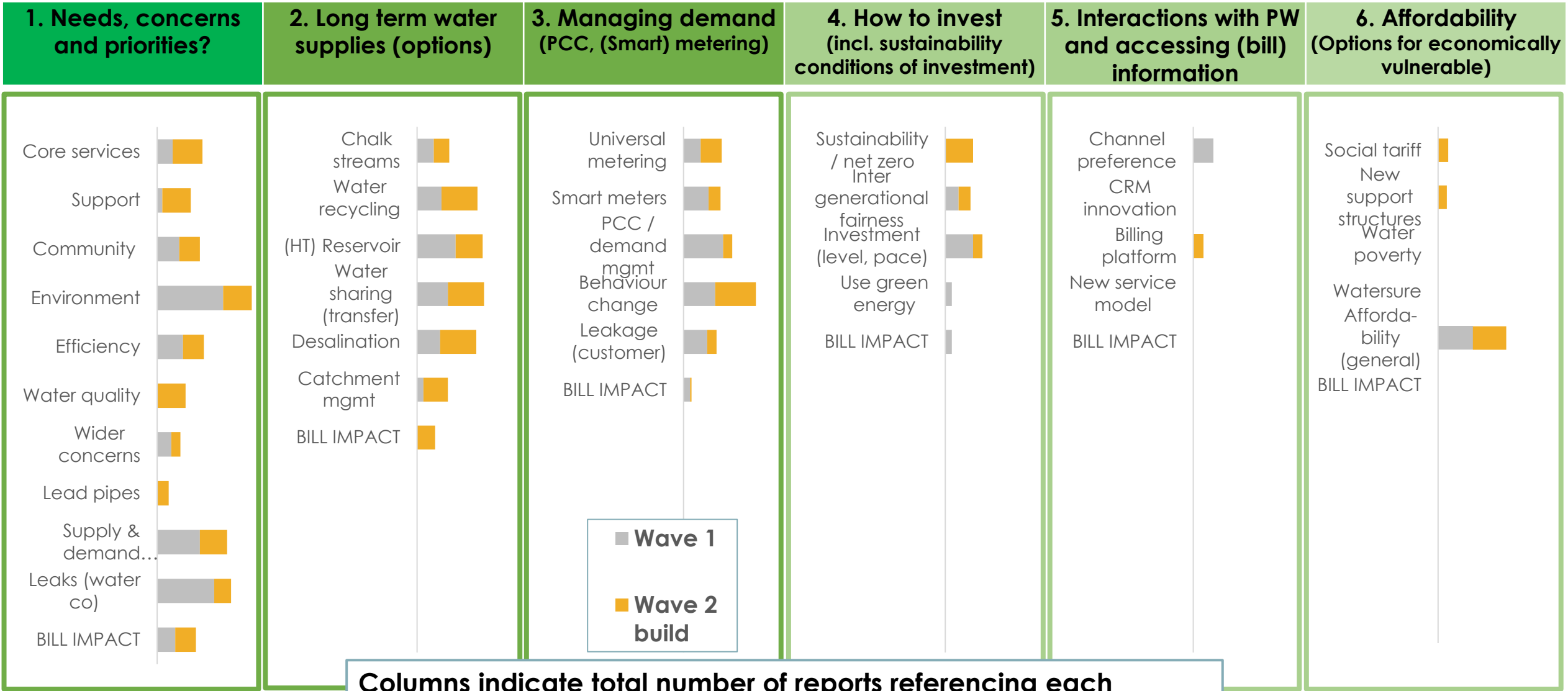
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The initial phase of Portsmouth Water's PR24 research provides strong evidence of Portsmouth Water customer views specifically on Big Conversations 1,2 and 3. There is also now more third-party evidence for Conversations 4,5 and 6, but dedicated work into these areas is yet to be carried out.
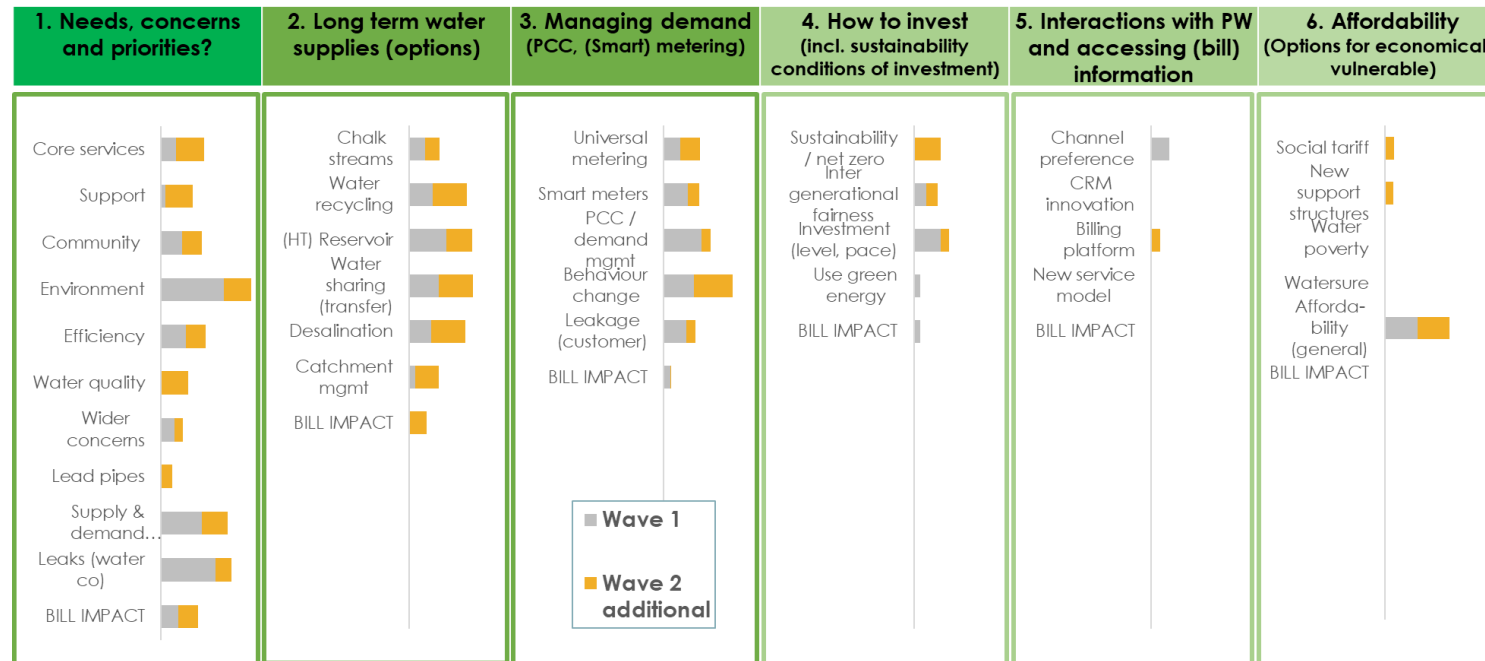
	Big conversations					
	1. Needs, concerns and priorities?	**2. Long term water supplies (options)**	**3. Managing demand (PCC, (Smart) metering)**	**4. How to invest (incl. sustainability conditions of investment)**	**5. Interactions with PW and accessing (bill) information**	**6. Affordability (Options for economically vulnerable)**
PRIMARY high quality reports (score 8-10)	2 (+2)	3 (+2)	2 (+2)	-	-	-
SECONDARY high quality reports (score 8-10)	2 (-)	-	3 (+1)	3 (+2)	3 (+2)	3 (+2)
Mid quality reports (score 5-7)	12 (+5)	8 (+4)	8 (+4)	6 (+3)	2 (+1)	5 (+2)
Lower quality / unrated reports (score 2-4 or unrated)	4 (+2)	2 (+2)	1 (+1)	2 (+2)	-	2 (+2)
Total	20 (+9)	13 (+8)	14 (+8)	11 (+7)	5 (+3)	10 (+5)

Number of reports at May '22

(Change from Dec '21)

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Most individual themes within Big Conversations 1, 2 and 3 now have evidence, but there are still significant evidence gaps in Conversations 4-6.


1. Needs, concerns and priorities?

- Core services
- Support
- Community
- Environment
- Efficiency
- Water quality
- Wider concerns
- Lead pipes
- Supply & demand…
- Leaks (water co)
- BILL IMPACT

2. Long term water supplies (options)

- Chalk streams
- Water recycling
- (HT) Reservoir
- Water sharing (transfer)
- Desalination
- Catchment mgmt
- BILL IMPACT

3. Managing demand (PCC, (Smart) metering)

- Universal metering
- Smart meters
- PCC / demand mgmt
- Behaviour change
- Leakage (customer)
- BILL IMPACT

4. How to invest (incl. sustainability conditions of investment)

- Sustainability / net zero
- Inter generational fairness
- Investment (level, pace)
- Use green energy
- BILL IMPACT

5. Interactions with PW and accessing (bill) information

- Channel preference
- CRM innovation
- Billing platform
- New service model
- BILL IMPACT

6. Affordability (Options for economically vulnerable)

- Social tariff
- New support structures
- Water poverty
- Watersure
- Afforda-bility (general)
- BILL IMPACT

Legend:
- **Wave 1** (grey)
- **Wave 2 build** (orange)

Columns indicate total number of reports referencing each individual theme, weighted to reflect report evidence scores

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Results from the first stages of PW's own research programme are now contributing to the evidence base…

- A substantial increase in evidence for big conversations 1, 2 and 3
- Additionally a number of secondary sources from Southern Water's insight programme
- As well as some new industry reports

Gap analysis
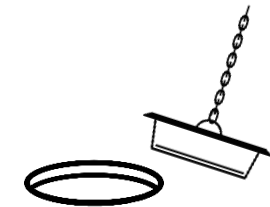
- Gaps identified in Stage 1 of the synthesis are beginning to be filled in Big Conversations 1,2 and 3
- Still significant gaps in Big Conversations 4,5 and 6, to be addressed in forthcoming work

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Big Conversation 1: Needs, concerns and priorities (1 of 2)

1

Previously…

A good baseline understanding, with evidence that environment is moving up the agenda
- Very high importance placed on water company efficiency to ensure minimal leakage
- Long term security of supply is also a critical (hygiene) factor
- Sensitivity about the environment is higher than in PR19
  - Very strong preference for companies to go beyond minimum requirement for protecting environment; generally accept paying (a small amount) more for environmental Improvements.
- Providing wider benefits also supported (local amenities and recreation)
- Lowest cost is NOT the most important thing for most

New evidence (overall)

- Dedicated, up to date, evidence specific to Portsmouth Water now added
- The new evidence plugs previous gaps in evidence on water quality, lead pipes, support and core services
- Priorities broadly align with previous general insight, with some added Portsmouth Water-specific findings:
- While **environment** is topical, it is only a medium-level priority for PW (a water-only supplier)
  - Reducing leaks, ensuring long term supply, company transparency & excellent service are all seen as more important for Portsmouth Water than environmental considerations
  - Water resource issues and associated environmental impacts are not 'top of mind' or well understood
    - Upon learning more about local water resources and chalk streams, customers do rate preserving the local environment as being important for Portsmouth Water
  - Sewage release is the dominant environmental issue for the water industry in the South East although most customers identify Southern Water, not Portsmouth Water, as responsible for this
- **Customer service** appears a higher priority for Portsmouth Water customers than other water companies – while satisfaction is strong and the 'local feel' is appreciated, service touchpoints need updating
- *Page 13 provides a consolidated summary of priorities for Portsmouth Water*
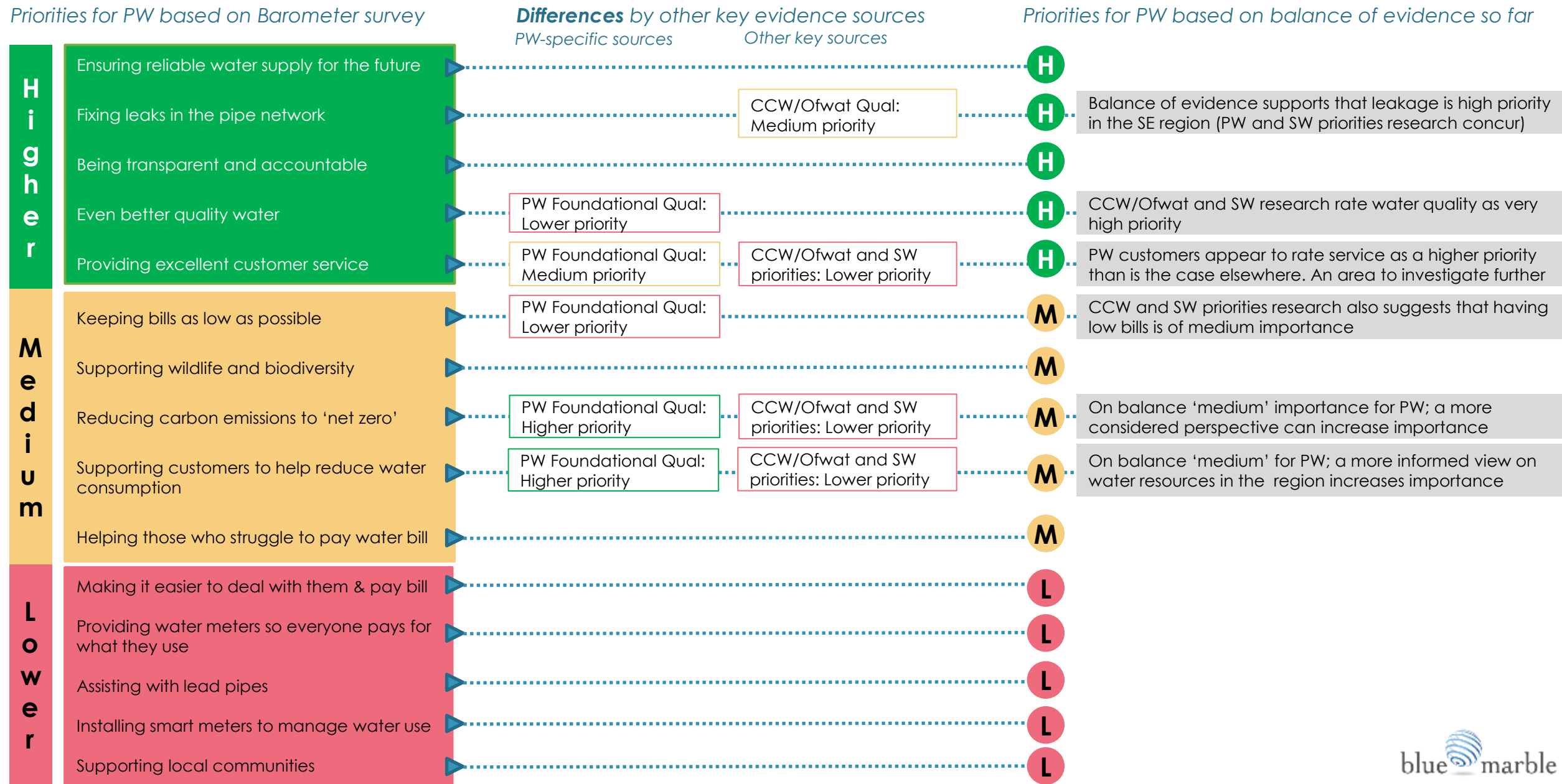
1 Big Conversation 1: Needs, concerns and priorities (2 of 2)

New evidence (specific customer groups)

- **Vulnerable customers** place greater emphasis on (bill) support and making it easier to deal with PW
  - Personally relevant issues (particularly health and finances) can be more pressing for them than societal and environmental challenges
  - Also indications that they may be more worried than others about lead pipes in their homes
- **Future customers** have environmental protection and sustainability front and centre of their concerns (based on Southern Water research)
- **Stakeholders** particularly emphasise the responsibility PW has for helping vulnerable customers
  - Many stakeholders conscious of the significant levels of deprivation in their local area (and impact of COVID), and aware of the broader need for payment support
- **NHH customers** have higher service expectations and want better communication

Remaining gaps

- Need a more definitive understanding of (larger) **NHH perspective**
- **Future customer** perspective needs to be validated by dedicated PW research
- Why is customer service more important for Portsmouth Water customers than is the case for other water companies?

Priorities for PW based on Barometer survey

Differences *by other key evidence sources*

PW-specific sources — *Other key sources*

Priorities for PW based on balance of evidence so far

Higher

Priority	PW-specific sources	Other key sources	Rating	Balance of evidence
Ensuring reliable water supply for the future			H	
Fixing leaks in the pipe network		CCW/Ofwat Qual: Medium priority	H	Balance of evidence supports that leakage is high priority in the SE region (PW and SW priorities research concur)
Being transparent and accountable			H	
Even better quality water	PW Foundational Qual: Lower priority		H	CCW/Ofwat and SW research rate water quality as very high priority
Providing excellent customer service	PW Foundational Qual: Medium priority	CCW/Ofwat and SW priorities: Lower priority	H	PW customers appear to rate service as a higher priority than is the case elsewhere. An area to investigate further

Medium

Priority	PW-specific sources	Other key sources	Rating	Balance of evidence
Keeping bills as low as possible	PW Foundational Qual: Lower priority		M	CCW and SW priorities research also suggests that having low bills is of medium importance
Supporting wildlife and biodiversity			M	
Reducing carbon emissions to 'net zero'	PW Foundational Qual: Higher priority	CCW/Ofwat and SW priorities: Lower priority	M	On balance 'medium' importance for PW; a more considered perspective can increase importance
Supporting customers to help reduce water consumption	PW Foundational Qual: Higher priority	CCW/Ofwat and SW priorities: Lower priority	M	On balance 'medium' for PW; a more informed view on water resources in the region increases importance
Helping those who struggle to pay water bill			M	

Lower

Priority	Rating
Making it easier to deal with them & pay bill	L
Providing water meters so everyone pays for what they use	L
Assisting with lead pipes	L
Installing smart meters to manage water use	L
Supporting local communities	L

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② Big Conversation 2: Long term water supply (options)

Previously…

- Low awareness of water resources / drought risk / strategic plans
- Consumers think primary focus should be on company efficiency (reducing leaks) and helping customers use less (which links with delivery of wider public value)
- New resource schemes and transfer options are next level down in terms of preference. In order:
  - There's broad support for **HTR**, driven by leisure and environmental benefits, but concern over localised disruption. **Catchment management** is a popular idea, but its role can be unclear. Broadly positive about **water transfer** (if environmentally sensitive / beneficial) but people don't want to be dependent on it. Mixed views on **water recycling** with concerns over water quality and safety - greater support when people know more. **Desalinisation** lower support – high energy, carbon and environmental impact, plus cost. **Tankering** has least support**.**
- Least preferred options are abstraction (environmental impact) & drought orders
- PW region some slight differences to overall SE region (e.g. slightly less averse to abstraction)

New evidence

- PW customer views added to the evidence, with clarity on preferences for new water sources (see next slide)
- Highest support for HTR as their preferred new source, with the majority supporting water recycling too. Then desalination. Water transfers least preferred option.
- PW stakeholders supportive of new sources provided environmental impact managed
- From wider (non PW) sources, proposals to abstract less and use catchment management are not well understood but the general principle to protect environments is supported (provided it is effective).

Remaining gaps

- Portsmouth Water customers now well represented in the evidence BUT the voices of NHH and Future customers limited

Long term water supply (options): What we know so far…

2

PW customer hierarchy of supply priorities

Highest preference

HTR
- Portsmouth Water customers support HTR as their preferred new source (4 in 10 aware of HT)
- Sustainable, positive community benefits
- But scepticism about topping up with recycled water (impact on quality and wildlife)

Other options harder to plot on the hierarchy for PW customers specifically

Chalk streams & abstraction
- Low awareness of chalk streams
- General appeal for reducing abstraction but suggestion that PW customers less adverse to abstraction than wider SE
- NHH question impact of reduction in abstraction on businesses & supply chains: communication essential

Water recycling
- Majority support water recycling: potential for reliability &
- Some (NHH) think already happens
- But some concerns about quality, safely & wholesomeness
- Minority conflate water recycling with CSOs

Desalination
- Long term, appropriate for a coastal location
- But disruptive, eyesore, potentially damaging to marine life
- Also high energy and perceived very expensive

Catchment management measures
- Beneficial for the environment
- But seen as experimental: success not guaranteed (and may be expensive)
- Insufficient alone – need to increase supplies too

Transfers
- Beneficial in theory but also concerns: expense, doesn't lead to self reliance; energy intensive; enlarging pipe network (with leaks and maintenance)
- Short term, with major logistics

Lowest preference

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3 Big Conversation 3: Managing demand (PCC and Metering)

Previously…

- Nationwide, only around 1 in 4 are aware of being asked by their water co to use less water
- PW customers are less conscious than SW customers of water use, and struggle to think how to use less (WFL)
- If customers know water resources are limited, there's high willingness to reduce water use (national)
- Consumers nationally think the top three actions water companies should take are: Fix more leaks, ask people to use less water and give water saving help and advice, and reward customers who reduce use
  - However, it's felt that it can be hard to implement & sustain measures to help save water
  - Some concern about reliability of relying on people to use less water
  - Future customers want everyone to pay an equal part in conserving water (with accountability)
- Metered customers are more likely to help to reduce their water use vs. unmetered
- Some resistance to metering identified (larger households; think bills will increase; don't want to worry about use) (WFL). Universal metering slightly less preferred in PW region vs. South East region overall (WRSE). Younger customers more likely to fit and trial a water meter.
- Good support for *smart* meters. Benefits are financial saving, enabling informed choices & helping educate

New evidence

- Overall, there is stronger support from PW customers to reduce demand ahead of investing in new resources
- PW customers support meters provided safeguards in place for financially vulnerable – while support for smart meters initially muted, 7 in 10 support once benefits communicated (14% reject smart meters)
- Stakeholders supportive of meters – in a region with higher usage than others – but customer engagement/comms important to get customer support
- PW customers more resistant to changing water behaviours (compared to SW and SEW customers)
- Mismatch between what young people say and do (desire to protect planet and water usage)

Remaining gaps

- Why are PW customers different re behaviour and attitudes to water saving? Drivers not fully explored
- Any differences in customer segments – esp. Future, NHH which are particularly relevant to this Big Conversation

4 Big Conversation 4: How to invest (incl. sustainability of investment)

The story so far…

Overall limited evidence:

- Majority want water companies (nationwide) to go 'beyond the basics' for meeting minimum legal requirements – particularly re: species extinction and climate change.
- Overall, there is a willingness to pay for investments now to safeguard water resources and the environment for future generations, although expect affordability to be taken into account
  - Future customers want affordability efforts to be faster and more radical
- Some evidence (from WRSE) that high energy use a common issue for new supply options; the goal of using green energy is reasonable to most consumers, provided this is at a reasonable cost
- Use of chemicals for water treatment is also a common issue with future options

New evidence

- PW customers demonstrate bill sensitivity
- PW customers want to pay for future investments gradually – no bill shocks
- Most do not want/anticipate large increases as currently satisfied with the service (and largely unaware of future challenges)
- In principle, and once informed about the challenges, most PW customers would prioritise ensuring reliability and protecting local environments over keeping bills low (and to a lesser extent, minimising energy use).
- NHH customers (in the SE more widely) sceptical of net zero targets (and the associated costs)

Remaining gaps

While some PW customer evidence is now present for this 'Big Conversation', gaps relate to:
- Intergenerational fairness (and what Future customers think)
- Pace of investment
- NHH (in PW region) perspective

The story so far…

- In general (nationally), if their water company wanted to let customers know about something important, the best way is by email; however younger customers under 35 are more likely to prefer flexible digital channels than older age groups
- ICS gives some evidence on broad touchpoint preferences for PW customers (social media is last!)
  - Phone was most widely used channel reported for interacting with PW at 41%. Email 27%; Website 23%; In writing (letter) 6%; webchat 2%; social media 1%
- Some secondary / incidental evidence around biggest / most preferred touchpoints
  - Nationally, awareness of social media campaigns to save water is low
  - Less then 1 in 10 nationally recall seeing water saving tips on social media in the last year with those on water meters more likely to recall them (although of these, 6 in 10 claim to have taken action).
  - claimed awareness of info sources about river / sea pollution were: 43% TV, 22% newspaper, 20% social media, 13% radio, 9% other online source

New evidence

- Some PW customers think billing service is due for modernisation
- PW expect: quick, effective, efficient, channel choice (including live chat and phone)
- PW customers expect website to cater for straightforward issues
- Automated services seen as unable to deal with many issues (importance of real people to help)

Remaining gaps

- No evidence collected so far on specific PW proposals e.g. CRM platform, billing platform, new service model (or impact on bill)

Big Conversation 6: Affordability (incl. options for economically vulnerable) [19]
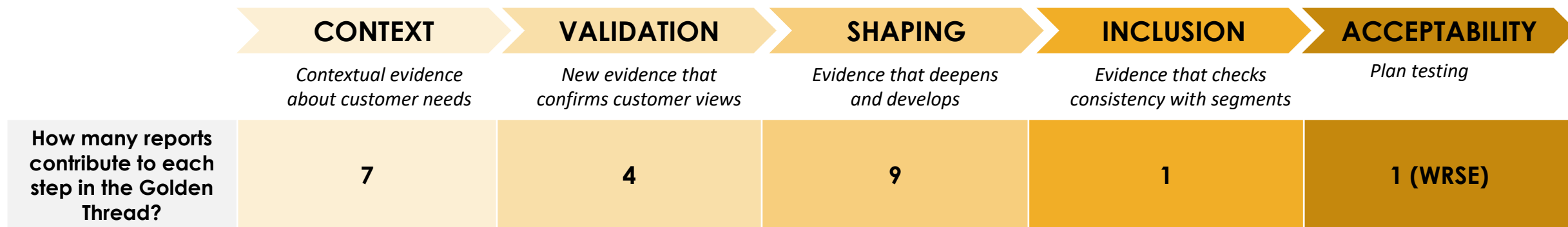
The story so far…

- Key expectation is that scale of any bill increase accounts for the needs of vulnerable and low-income households helping to ensure their bills are affordable. Customers open to modest bill increases
- Affordability needs to be taken into account when investing now for future generations
  - Future customers want affordability efforts to be faster and more radical
- Nationwide picture on bill affordability shows differences by groups:
  - Those aged between 18 – 29 years were most likely to say their bills were unaffordable and that their financial situation got worse last year (this is **higher than last year**)
  - Those customers with a disability or with a disabled person in their household are significantly more likely to disagree that their charges are affordable (same as last year)
  - Those of Asian, mixed or 'other' ethnicity are also more likely to disagree that their charges are affordable, which is also similar to last year
- So a priority is ensuring water bills remain affordable and helping those on lower incomes and more vulnerable
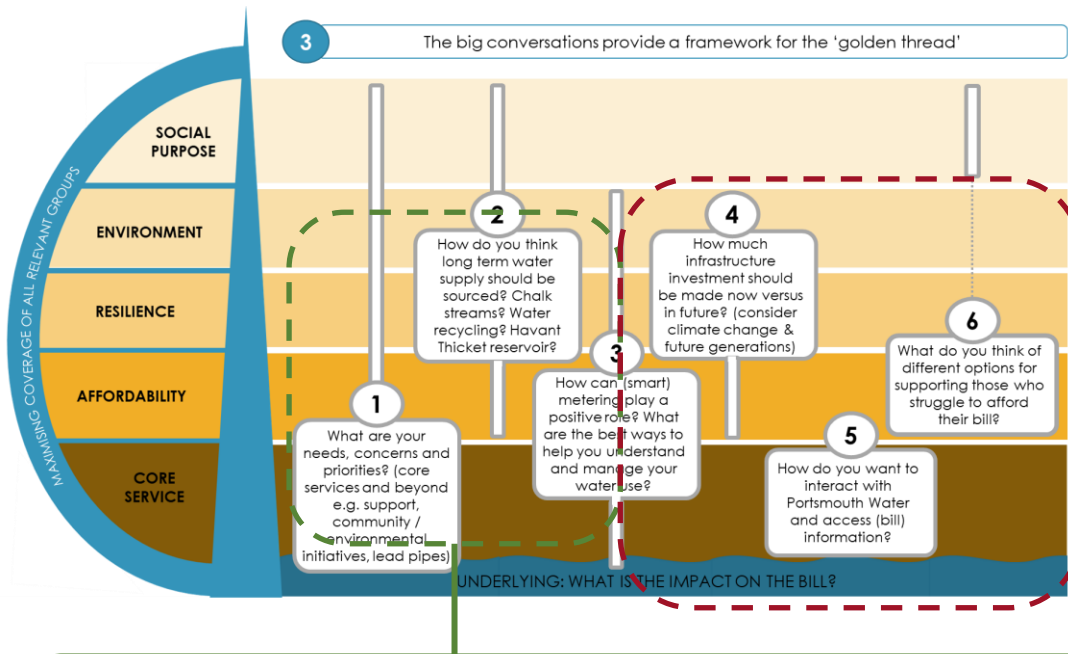
New evidence

- PW customers happy in principle to pay more to help others, provided the schemes reach the right people
- Some PW customers voice concern about bill increases generally (and that general proposals re investments can look costly)
- PW customers with affordability issues can have different views e.g. universal metering - and are less satisfied with PW

Remaining gaps

Evidence remains patchy and very generalised and multiple gaps need to be filled specifically for PW:
- Social tariff; New support structures; Water poverty

The Golden Thread

	CONTEXT	VALIDATION	SHAPING	INCLUSION	ACCEPTABILITY
	Contextual evidence about customer needs	*New evidence that confirms customer views*	*Evidence that deepens and develops*	*Evidence that checks consistency with segments*	*Plan testing*
How many reports contribute to each step in the Golden Thread?	7	4	9	1	1 (WRSE)

- We have been monitoring evidence sources and indicating where each has a clear role in 'the Golden Thread' under the high level codes, as shown above
- The key to the Golden Thread is showing where the research and insight has informed aspects of the plan ('you said, we did')
- We need to build this Golden Thread analysis with you, and in relation to:
  - Setting the vision
  - Developing the plan options
  - The draft plan
- Other thoughts:
  - So far, no operational data has fed into the synthesis (complaints data, social media analysis, other)
  - Cost of living squeeze is the common context: we will include any relevant publications in the next review to provide context in which to understand cost sensitivities

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The big conversations provide a framework for the 'golden thread'

Evidence much more limited relating to more detailed proposals and specifically the cost/bill implications:
- Indications that PW customers are 'price sensitive' but this is not fully understood yet
- Clues that customers do not expect significant bill increases which is testament to a) no collective understanding of the climate challenges facing water providers and b) current high levels of satisfaction
- Indications that customers are looking for water companies generally to make provision for low income/struggling households – but what will this look like?

Evidence provides PW with clear principles for developing plan options in line with customer expectations:
- Prioritise long term supply reliability, leak reduction, water quality, customer service
- Make long term supply-demand choices that:
  - Prioritise demand management over new supply options
  - Do not cause detriment to the environment
  - Put energy efficiency first (and are not carbon intensive)
  - Demonstrate cost efficiency
  - Are long term solutions, not sticking plasters
- In principle, reliability and pro-environmental choices trump lower bills

Majority of customers show support for key areas of investment:
- Havant Thicket Reservoir
- Increasing meter penetration and introduce smart meters

Some specific gaps to address in upcoming PW research:
- Exploring differences in PW customer attitudes/behaviours
  - Customer profiling underway (GIS etc.)
  - Deep dive drivers for higher PCC in PW region
  - Potentially other dimensions arising from new research
- Key segment voices under-represented:
  - NHH (small PW samples showing no notable differences to HH views – do they agree with the broad principles?)
  - Future: especially relevant for establishing robust answer to intergenerational fairness question – and pace
  - Vulnerable audiences: potential for a deep dive into needs
- Big Conversation framework developed before the 'Vision' requirement announced (being addressed in the first CAP)
- Specific plans relating to metering, lead replacement, new billing platform – and all plan aspects!

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Appendix

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

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