Synthesis and Triangulation workstream

Report 1:
Existing evidence review and developing the register

December 2021

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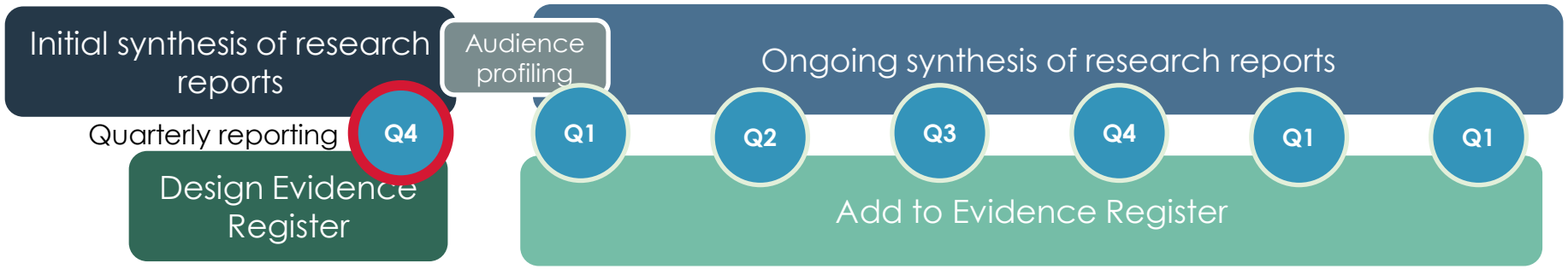
Introduction to PW's PR24 triangulation



This is the first report for the Triangulation workstream and sets out 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

How have we developed the Evidence Register?

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) 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				

Preliminary review of 16 reports

We reviewed 16 reports to date, commissioned or written by Portsmouth Water, Southern Water, CCW, ICS, Ofwat or WRSE.

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

Evidence scoring and appraisal of relevance to big conversations.

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

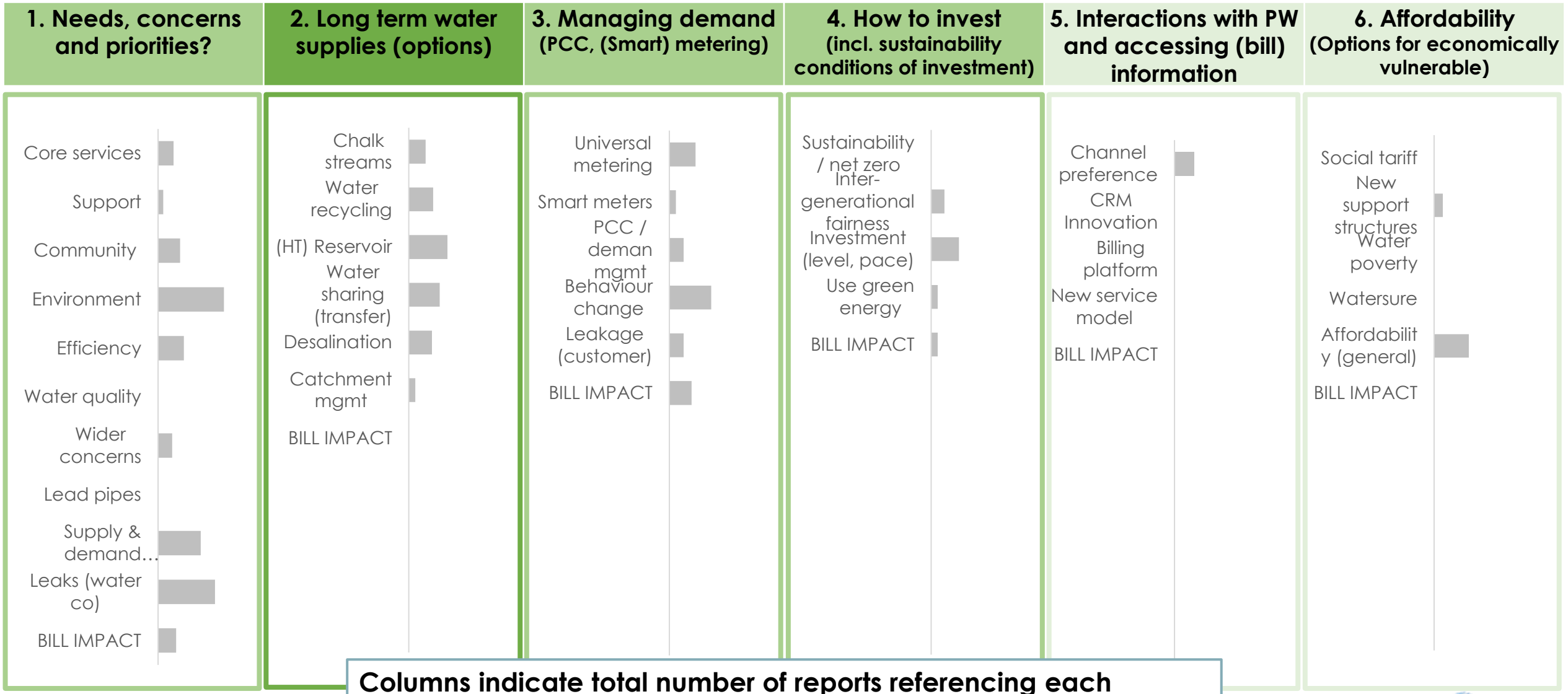
To date, only Big Conversation 2 has *dedicated* high quality evidence.

Number of reports

(Dec '21)

	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)	-	1	-	-	-	-
SECONDARY high quality reports (score 8-10)	2	-	2	1	1	1
Mid quality reports (score 5-7)	7	4	4	3	1	3
Lower quality reports (score 2-4)	2	-	-	-	-	1
Total	11	5	6	4	2	5

Within the Big Conversations, insight into some individual themes is more widely evidenced than others – general importance of environment and leaks are top.



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

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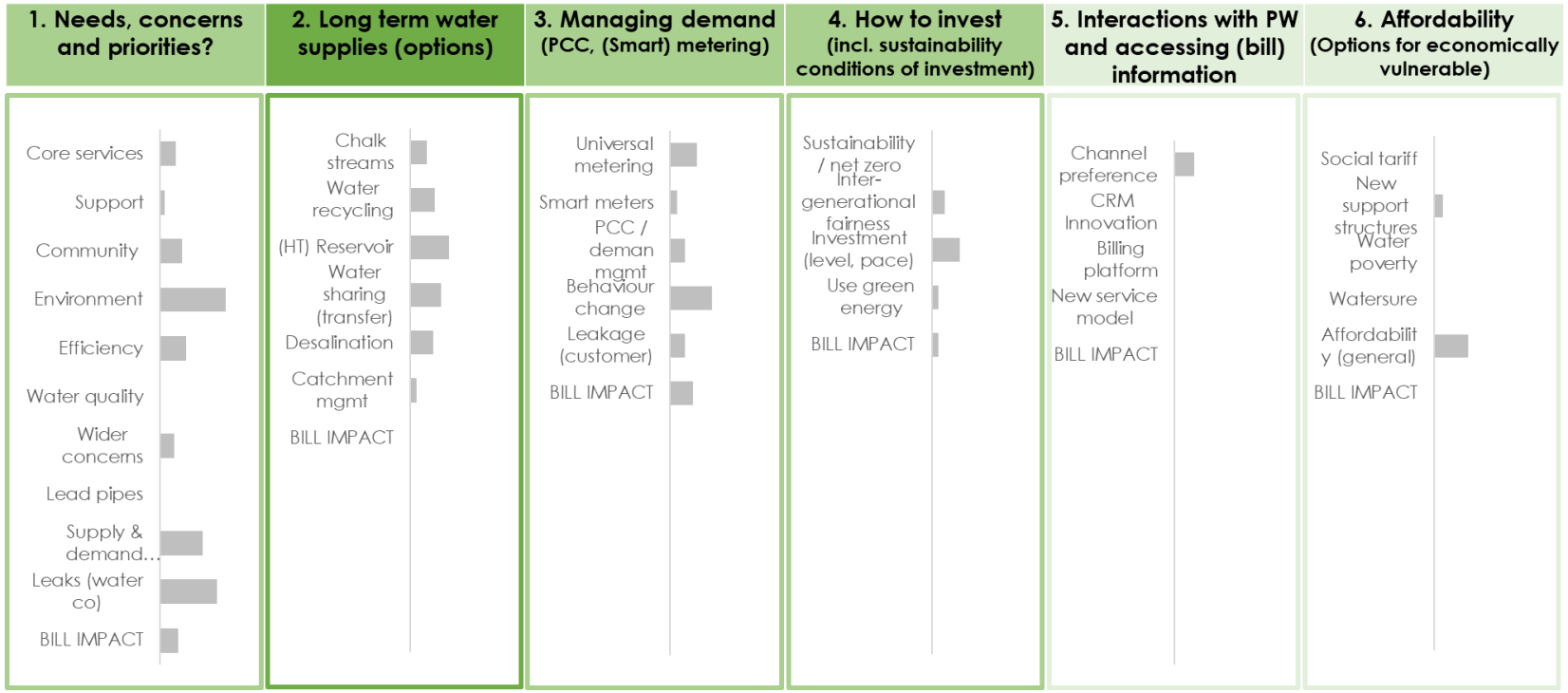
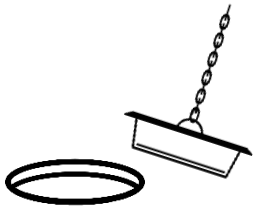
Overview of current status



This is just the beginning…

- Very modest number of sources reviewed so far
- PW's own research programme has now begun with customer and stakeholder research reporting during 2022 Q1
- As well as other industry reports expected



Gap analysis

- Most evidence from the WRSE work hence (environmental) needs & expectations and long term supply conversations better covered
- But overall more gaps than plugs!

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1 Big Conversation 1: Needs, concerns and priorities

The story so far…

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; service levels are no longer seen as more important than environment; future customers see environment as top priority
- 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

Gaps in evidence

A general need for higher quality up-to-date evidence. Particular gaps noted for:

- No evidence so far on importance of **water quality; lead pipes; support**
- Very little evidence of importance of core services (although PW performs strongly in quality of service, reliability and ease in ICS report).
- Evidence for different audiences' priorities (HH, NHH, vulnerable) is not specific to PW

Emerging questions / tensions?

- CSOs / sewage release into environment are prominent at the moment and are damaging trust nationally (Southern Water in particular). A need to take account of this and explore misattribution to PW?
- Should we add corporate reputation / transparency to the list of themes?

Coming soon…
Steps in NEXT 3 MONTHS to fill gaps / explore / resolve

- Mini consultation survey to engage wider audience on broad issues and priorities (incl. water quality)
- Qualitative consumer & stakeholder research to explore priorities
- First round of 'WaterTalk' Barometer panel to include question(s) on CSOs / sewage release
- LONGER RUN: TABULATE WITH GAPS. INCL. 'TBC' plus is there anything historic we don't have?

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

The story so far…

- 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)

Gaps in evidence

- Portsmouth Water sample is only moderately robust within the high quality WRSE research
- WRSE acknowledges limits on how much customers can be engaged on water sharing and SROs at a broad regional level. E.g. More specific (HTR) information needed; desalination needs context set for people to form a considered view.

Emerging questions / tensions?

- HTR – regional vs local view. Broadly positive view but isolated scepticism on whether local view downplayed
- Water recycling: WRSE says views are mixed while SW strategy document says views are broadly positive. It's a complex area and needs careful exploration and sensitivity

Coming soon…
Steps in NEXT 3 MONTHS to fill gaps / explore / resolve

- WRSE are continuing work and further exploring emerging questions
- Qualitative consumer & stakeholder research to explore
- Mini consultation survey to engage wider audience on top level view of new supply sources, helping customers use less and intergenerational fairness

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

The story so far…

- 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

Gaps in evidence

A general need for higher quality up-to-date evidence specifically for PW customers

- Least volume of evidence so far for **smart meters** and **customer-side leakage**
- Need a better understanding of appetite for changing **how** water is used e.g. greywater, tariffs, incentives

Emerging questions / tensions?

- Universal meeting is met with some resistance and yet smart meters have strong support
- Customers feel company leakage contradicts encouragement for personal efficiency

Coming soon…
Steps in NEXT 3 MONTHS to fill gaps / explore / resolve

- Coverage of smart meters and universal meters in forthcoming Qual research
- Mini consultation survey to engage wider audience on top level view of universal metering; helping reduce PCC

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

Gaps in evidence

Evidence is mostly very generalised (nationwide) or a secondary objective in the reports so **all themes in this conversation need greater evidence for PW**

- No specific mentions at all of net zero (care needed in language for consumer facing research!)

Emerging questions / tensions?

- Some tension with future customers greater emphasis on making affordable in future (?)

Coming soon…
Steps in NEXT 3 MONTHS to fill gaps / explore / resolve

- Mini consultation survey to engage wider audience on top level view on intergenerational fairness
- Qualitative consumer & stakeholder research to explore importance of carbon neutral and timescale

5 Big Conversation 5: Interactions with PW and accessing (bill) information

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

Gaps in evidence

Substantial gaps

- No evidence collected so far on CRM platform, billing platform, new service model (or impact on bill)

Emerging questions / tensions?

- Importance and impact of social media seems to vary. Opportunity to understand how much this Is it topic-dependent and author-dependent

Coming soon…
Steps in NEXT 3 MONTHS to fill gaps / explore / resolve

- Nothing currently planned, potential for focus on WaterTalk barometer.

6 Big Conversation 6: Affordability (incl. options for economically vulnerable)

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

Gaps in evidence

Evidence is patchy and very generalised and multiple gaps need to be filled specifically for PW:

- Social tariff; New support structures; Water poverty

Emerging questions / tensions?

- Specific concepts (e.g. national social tariff) are yet to be explored

Coming soon…
Steps in NEXT 3 MONTHS to fill gaps / explore / resolve

- Nothing currently planned, potential for focus on WaterTalk barometer and ad hoc bespoke research

Additional past reports that may assist filling gaps

We would like to review the following reports which were covered in Portsmouth Water's PR19 Research and Triangulation. Where these are deemed relevant and of sufficient quality (and recency) we will incorporate into the main synthesis exercise:

- Customer Advisory Panel reports x 5 (marked as Appendix 2.4, 2.6, 2.7, 2.16 & 2.22)
- ICS PC & ODI Customer Survey results
- Havant Thicket stakeholders
- Community Research- Qualitative Research with Non-Household Customers
- ICS Quantitative Research-Performance commitments & stretched targets
- Water Resources Management Plan Consultation (WRMP)
- Bill Profiling & Company Specific premium
- Customer Affordability Survey
- Interruptions to Supply, survey 2
- ICS Acceptance Testing

Blue Marble Research Ltd
www.bluemarbleresearch.co.uk
01761 239329