PR24: Foundational Customer Research

Deliberative research with customers
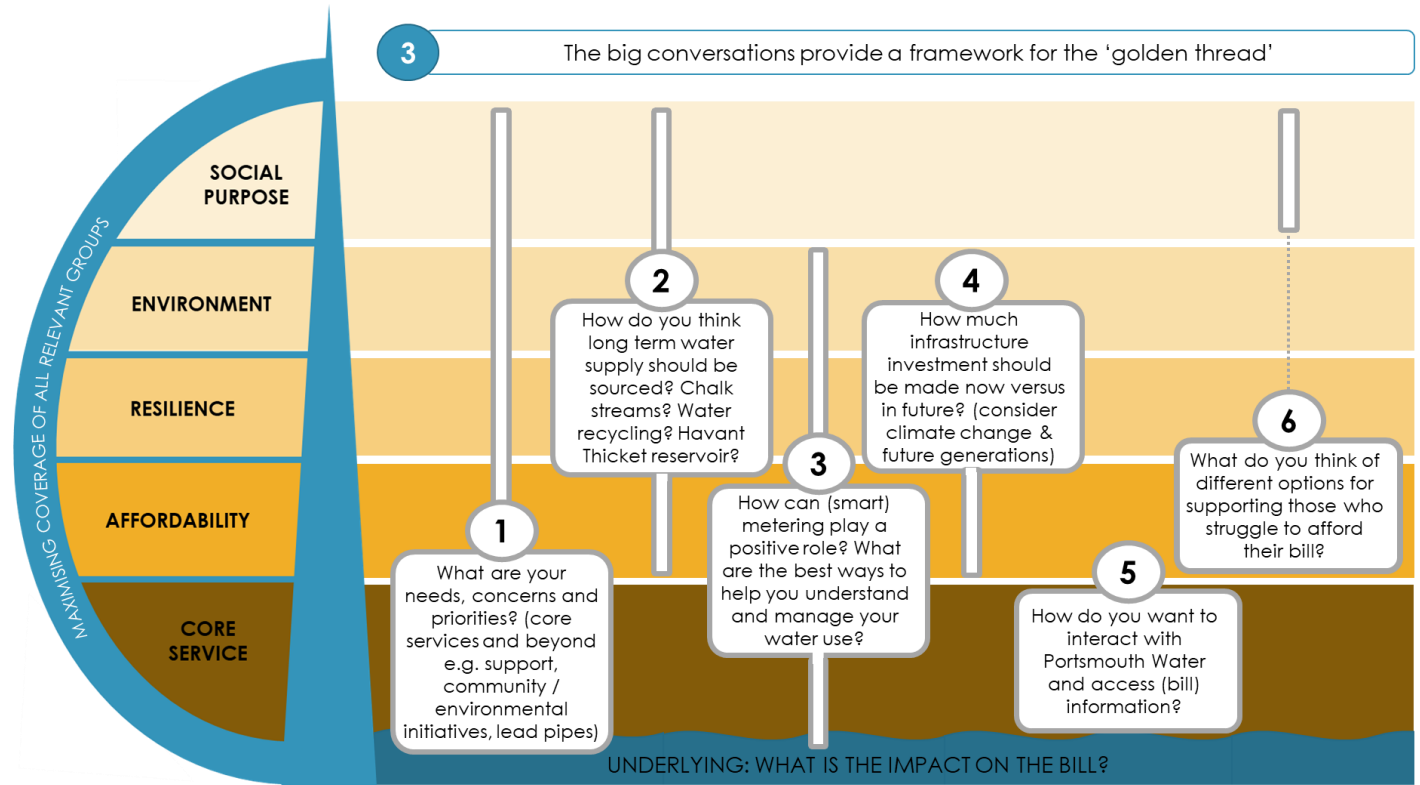
February 2021

Methodology

- **To develop a set of principles customers/ citizens wish PW to adopt throughout the plan and providing clear links to planning decisions**

- **To touch on all of the 'big conversations' to understand:**
  - Current awareness/resonance with the underlying issues pertaining to each theme e.g. environmental/Net Zero; long term resilience of the water system; reducing PCC, affordability, intergenerational investment etc.
  - Unprompted expectations of PW in addressing future challenges
  - Prompted response to specific issues and (uncosted) options facing PW
  - Bill sensitivity relating to (broadly costed) options facing PW

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

MAXIMISING COVERAGE OF ALL RELEVANT GROUPS

SOCIAL PURPOSE

ENVIRONMENT

RESILIENCE

AFFORDABILITY

CORE SERVICE

1 — What are your needs, concerns and priorities? (core services and beyond e.g. support, community / environmental initiatives, lead pipes)

2 — How do you think long term water supply should be sourced? Chalk streams? Water recycling? Havant Thicket reservoir?

3 — How can (smart) metering play a positive role? What are the best ways to help you understand and manage your water use?

4 — How much infrastructure investment should be made now versus in future? (consider climate change & future generations)

5 — How do you want to interact with Portsmouth Water and access (bill) information?

6 — What do you think of different options for supporting those who struggle to afford their bill?

UNDERLYING: WHAT IS THE IMPACT ON THE BILL?

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Methodology and sample

- We used a **qualitative methodology** as a foundational conversation with a broad cross-section of customers and non customers
- At the core of this project was a set of customer-friendly stimulus material setting out the challenges and decisions facing Portsmouth Water. Blue Marble developed these in collaboration with Portsmouth Water and reflected various options and considerations for Portsmouth Water.

1 Online panel

- Online community lasting 1 week, taking place via online platform. Customers were asked to log in for 15 mins per day, to complete specific activities.
- We spoke to 36 individuals broken down into different demographic groups
- 4 groups with household bill payers
- 2 groups with non bill payers (one of future customers, one older non bill payers)
- 1 group with non-household customers

2 Reconvened to a follow-up deliberative group of 90 minutes

- 7x groups of 5 respondents
- Discussion guide covered in-depth questions about the 'big conversations'
- Responding to prepared stimulus about options facing PW
- Moderation and probing to stimulate debate and consensus building
- We also individually interviewed 3 additional NHH customers to fully hear their perspective

Household sample	Younger customers (<45)	Older customers (>45)	Non/future customers
ABC1	1 group (5 people)	1 group (5 people)	1 group (5 people)
C2DE	1 group (5 people)	1 group (5 people)	1 group (5 people)
Non-household sample	1 group (5 people)		

Homework exercise

7 x follow up deliberative groups
Reconvening the 36 participants from the earlier group discussions (3 additional depth interviews)

NOTE: we have drawn out differing responses based on demographics, but found there were few differences to report

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Executive summary

1   ***Portsmouth Water has a strong reputation with its customers***
Customers consider Portsmouth Water to provide a good service and have affordable bills

2   ***However, there is some evidence of confusion between Portsmouth Water and Southern Water***
This is primarily around billing but also potentially in response to the sewage spill controversy

3   ***Water scarcity and challenges faced by water companies such as Portsmouth Water are not well understood***

4   ***While there's widespread support for investing in new ways to supply water, this is coupled with an expectation that Portsmouth Water also need to focus on managing demand***

5   ***In terms of supply options, this research has reflected research from WRSE from the wider region***
Portsmouth Water customers also want approaches that are:

Kind to the environment	Cost efficient	Long-term fixes	Offering a reliable solution

6   ***With these principles in mind, customers are looking to prioritise: Fixing leaks, Reducing Carbon and Encouraging customers to use less water***

7   ***Bill sensitivity is evident; customers say they want long term investment to be paid for gradually***
This indicates that customers expect to pay for future investments, even if they may not personally benefit from them. Most do not see the need for large bill increases as they're currently satisfied with the service (and they are not party to the long-term challenges facing Portsmouth Water)

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Customer context

Generally, impressions of Portsmouth Water are positive

Knowledge of Portsmouth Water is limited; customers and future customers know they supply their water but **aren't aware of much** beyond this

Interactions with Portsmouth Water are **minimal**; rarely need to get in touch beyond circumstances related to bills

As customers don't have a choice, Portsmouth Water **falls under less scrutiny** than companies in other industries where you can 'shop' for better service

Key strengths for Portsmouth Water include:

✓ **Doing the basics well:** providing clean, good quality water at a reasonable price

✓ **Good customer service:** specific mention of twitter account interacting with customers

✓ **Affordable bills:** awareness that their bills are comparably cheaper than other water supplies

✓ **(For some) a nice website:** easy enough to use

Where there's room for improvement:

• A few mentions of long wait times on the phone lines

• Suggestion of a mobile app as an easy way to manage bills

Service expectations are **higher for NHH customers**: want to see better communication e.g. keeping customers better informed about switching to metered charging

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A number of customers still struggle to understand the difference between what Portsmouth Water is offering and what Southern Water is offering.

A few assumed they were being charged twice for their water when they saw two bills come through

!

WATCHOUT: customers are alert to negative media coverage around Southern Water and issues with sewage water flowing into natural water sources.

"Southern Water is a very bad case in point. Dumping of raw sewerage in our rivers and coastal waters. In my view, this because of under investment …they were content to pay out huge management bonuses and high return on shares. It's only in recent years that they have stopped these profligate pay outs"
(HH customer, Older ABC1)

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Understanding of the issue and fast resolution are at the heart of <u>good service</u>

Customer expectations for excellent service:

Quick

- **Solve the problem** as quickly as possible, and preferably during **first contact** if the problem is small
- **Quick response times** for emails or returning calls (less than 24hrs is great, less than 48hrs is expected)
- If the issue is urgent, expect someone to **deal with the problem on the day** e.g. in scenarios where service is cut off
- × Don't want to be **left on hold** for a long time

Effective and efficient

- Deal with someone who can **quickly understand** the problem and **knows how to solve it**
- Show you care and **take the time to talk to customers** and let them explain their problem and have their say
- **Rectify mistakes** with minimal disruption to the customer and ensure that issues are dealt with appropriately
- Where possible, **websites or online services** should be designed to cater for straightforward issues

Offer easy communication

- **Keep customers in the loop** by providing regular updates on progress for ongoing issues
- **Provide a choice of channels** – email, phone and live chat are expected
- **Long opening hours** for phone lines to suit all work patterns
- Offer **social media communications** as a bonus e.g. responsive Twitter or Facebook page

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In general, struggling to get in touch and poor resolution make for <u>bad service</u>

Key bugbears that constitute bad service:

- × **Incompetence:** when a company appears not to know what they're doing, understand the issue or resolve it

- × **Too much contact:** having to go back and forth with a company on the same issue can get frustrating and time consuming

- × **Difficult to contact:** limited channels to get in touch, but also when existing channels don't work well e.g. long wait times on the phone, limited opening hours, long wait times for email responses etc.
  - • Frustration from busy phone lines can be eased with call back option, choice of hold music and queue countdown

- × **Uninformed staff:** often linked to phone lines or call centres, staff lacking sufficient understanding of the industry and therefore can't understand or diagnose the issue

- × **Automated services:** generally considered not intelligent enough to deal with many issues

!

NOTE: people no longer think it's acceptable to use COVID as an excuse for reduced service as they feel companies have had sufficient time to adapt

"I think utility companies are still playing the 'due to COVID our staff are WFH, please be patient' card and it's not really fair anymore. We have had almost 2 years of WFH and time to build an infrastructure that can work alongside it"
(HH customer, Younger C2DE)

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Awareness of water resource challenges

The **environmental issues of key concern** are those with a large negative impact that are widely spoken about in mainstream media:

- **Climate change**
- **Rising sea levels**
- **Overpopulation**
- **Ecosystems and water environment (specifically sewage)**
- **Pollution (both plastic pollution and air pollution)**
- **Deforestation**
- **Threats to marine life**
- **Littering**

Actions do not always correlate with what they care about. Instead, there is a focus on easy/manageable lifestyle changes:

Tackling waste:
- Recycling
- Reducing consumption and reusing things
- Avoiding single use plastic

Pollution/emissions:
- Using public transport where possible
- Buying local/reducing air miles of products

Energy crisis:
- Saving energy by switching off lights
- Solar panels

General:
- Buying sustainable or eco-friendly products
- Altering diet to eat less meat

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Water resource issues take a back seat relative to other environment concerns

When we asked customers for their unprompted environmental concerns, very few mentioned water scarcity amongst their list of environmental concerns

Once we provided information about the long-term water resource challenges facing the UK, almost all in our sample were unaware of water scarcity in the UK and were shocked upon hearing about it:

? *It rains all the time*

? *We're surrounded by water*

? *We have rivers/canals everywhere*

? *Why isn't it bigger news?*

"Do we genuinely need more water supply here where it rains so much and we have rivers?"
(HH customer, Younger C2DE)

"[Water resources] don't feel as important because we have plenty of water to go around. We are a water-rich country"
(HH non-customer/future billpayer)

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Customers believe utility companies play a huge role in protecting the environment

It's generally felt that **companies have more of a responsibility than individuals** to ensure that they are doing what they can to minimise damage to the environment

There is an **expectation** that utility companies should address environmental issues as part of their wider priorities within the business

Important that companies prioritise **investment into environment-based solutions** over shareholders or large profits

For water companies in particular…
- For customers, being environmentally friendly as a water company is about ensuring water is clean and safe to drink and that sources remain unpolluted
- A few also mention responsibility in terms of ensuring they're using sustainable water sources for their supply
- Many mention the media around Southern Water sewage and water (specifically river) pollution – it has hugely impacted impressions of the company

"[Southern Water] should have a higher level of ambition for our precious water environment. They should be named and shamed. If they don't pollution charges should be much, much higher and the courts should be prosecuting companies"
(HH non-customer/future billpayer)

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Portsmouth Water's challenges

Does it damage the environment?

Does it require a lot of energy? If so, is renewable an option?

How expensive is it and how much will it affect our bills?

Is it only a short term solution or will it work in the long term?

How reliable is it as a supply option?

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Water recycling

The water that companies provide for their customers is taken from the environment. After customers use it, it can be treated and returned to the environment once more. The cycle then repeats.

Water recycling essentially speeds up the natural process of water treatment. Instead of returning treated water to the environment, companies can recycle it. This means it can be kept within water company networks – reducing the amount they need to take from the environment.

Havant Thicket Reservoir

Desalination

Desalination is the process of taking salt water and treating it to remove the salt so that it can be used for drinking water.

It is a reliable source due to the abundance of seawater providing large volumes of additional water, and can be built in a modular fashion so that extra capacity can be added as needed over time.

However, there are some drawbacks including high cost, high energy requirement and large quantities of salt (brine) being produced which needs to be safely disposed of.
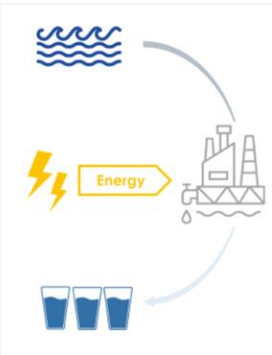
Transferring water

Transferring water revolves around sharing water with other water companies.

Water may be transferred:
- Within a company
- Between companies
- Between regions

Water may be transferred via dedicated pipelines, or using rivers or canals.

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Water recycling: sounds like a sensible and sustainable idea

The water that companies provide for their customers is taken from the environment. After customers use it, it can be treated and returned to the environment once more. The cycle then repeats.

Water recycling essentially speeds up the natural process of water treatment. Instead of returning treated water to the environment, companies can recycle it. This means it can be kept within water company networks – reducing the amount they need to take from the environment.

✓ **Clean**, **positive**, **sustainable**

✓ The **term 'Water recycling'** automatically makes people feel positively about it

✓ The **concept of 'reusing' water** can only be seen as a good thing

✓ Sounds like it requires **less energy/harm** to the environment than other options

? Need **more information** to understand if the treatment is sufficient to get it back up to high standard/quality

? Some **worries about chemicals** going into the environment and water supply

"Anything that can reduce impact on the environment is a good thing"

"Well, recycling anything has to be a good step towards saving the planet!"

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Transferring water: seems like a logical way to evenly distribute supplies

Transferring water revolves around sharing water with other water companies.

Water may be transferred:
- Within a company
- Between companies
- Between regions

Water may be transferred via dedicated pipelines, or using rivers or canals.

"Sharing is caring, it makes sense if there is excess water that can be shared"

"Cost came straight to my mind – how do they work it out?"

✓ **Makes sense** to send water elsewhere if there are other companies in need and you have an excess

✓ Concept of 'owning' water is difficult to wrap your head around – **everyone has right to it**

❓ Some concerns that it is only a sticking plaster – **not a long term solution**

❓ Want to know **more about costs and how it works**; important that it's not a profiteering move

❓ Concerns about water lost through **pipe leaks**

❓ Want to understand **how it works logistically** – is the infrastructure in place or will it be disruptive or expensive?

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Desalination: a logical solution but raises concerns about cost

Desalination is the process of taking salt water and treating it to remove the salt so that it can be used for drinking water.

It is a reliable source due to the abundance of seawater providing large volumes of additional water, and can be built in a modular fashion so that extra capacity can be added as needed over time.

However, there are some drawbacks including high cost, high energy requirement and large quantities of salt (brine) being produced which needs to be safely disposed of.

Energy
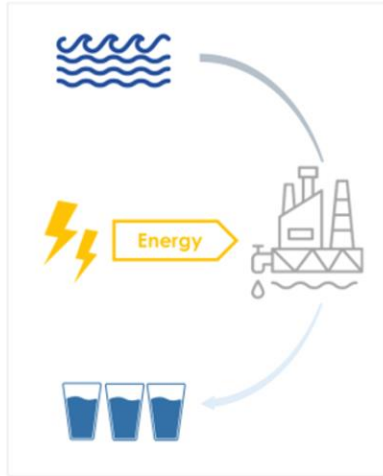
"Feels like a good option in the long term. It seems like a quite long-winded way of supplying water but a good last resort as the sea isn't going anywhere"

"Seems at odds with everything else companies are looking at in regards to carbon footprint"

✓ In principle, **makes sense** as we are surrounded by water

✓ Good **long term solution** – there will always be enough water

• Some assume this will help to **combat rising sea levels**

? Concerns about **building in Portsmouth** or on the coast – would it be disruptive and/or an eyesore?

? Would prefer to see **brine** by-product used and **not wasted**

? Would want to **ensure water quality remains** as high as it is currently

? High energy usage seems **bad for the environment**

? Wouldn't want to see **high costs affect bills** drastically

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✓ **Overall concept** of using a reservoir to collect and supply water is well received

✓ Feels like a **sustainable** idea

✓ Idea of **positively impacting the community** has appeal

✓ Additional benefit of a **nice place to go** makes it even more worthwhile

✓ NB: video does a good job to raise excitement and 'sell' the idea

? Questions about the specific location and what would need to be **destroyed or removed** to make room

? If reservoir is being built not just for Portsmouth Water customers but to supply water elsewhere, the **cost should be shared**

"It's the only one that creates something for the local community as opposed to a commercial planet"

"Love the idea but why are they doing all this provision to transfer it to some other company? Are Southern Water trying to put plans in place to preserve their water?"

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We presented customers with two scenarios about how to pay for long-term investments, designed to capture trade-offs around intergenerational fairness.

Scenario 1

Customers' bills (£)

Bills stay relatively stable over time

Time (years)

Before reservoir complete | Once reservoir complete | Once investment is paid off

Customers strongly preferred Scenario 1, where customers pay for long-term investments gradually, over the long term. This was because:

- **Lower financial impact on any individual customer** at any point
- **Water is seen as a public good** – meaning that we all have a duty to contribute towards its future, even if we will not personally benefit from it
- **The overall cost to customers is lower**

Scenario 2

Customers' bills (£)

Bills very high when reservoir is complete

Time (years)

Before reservoir complete | Once reservoir complete | Once investment is paid off

No customers preferred Scenario 2. Concerns included:

- **Risk of unmanageable financial burden on less affluent customers** at the point where the bill impact is greatest
    - This feels particularly important amidst current economic challenges
- For older customers in particular, this feels unfair for the next generation

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Customers are willing to accept a small increase in bills to keep service levels the same

We provided customers with initial information about how customer bills would affect levels of service.

	Lower bills than now*	Same bills as now*	Small increase in bills*	Large increase in bills*
Level of service NOW	Lower	Same	Same	Better
Level of service IN THE FUTURE	Lower	Lower	Same	Better

Unwilling to make decision without further information

- Customers pushed back on their ability to make a fully informed decision.
- They wanted more information about the financial sums involved and about relative levels of service offered.

Instinctive preference for stability

- On balance customers preferred either stable bills or a small increase – but told us that they needed more detail before making a final decision.

Happy with current service levels

- Some also questioned the need for better service in the future – saying that the service they receive from their water company at the moment is good enough for their needs.

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Metering and billing

Metering is generally considered a fair way of structuring bills

We provided customers with information about the pros and cons of metering.

Customers strongly supported more widespread metering in principle and individually

- **Metering was seen as a fair basis for bills** – paying for what you use is commonplace in many other areas of life (e.g. energy, city centre parking)

- **The long-term environmental challenges facing the water sector** mean charging based on usage feels particularly valid
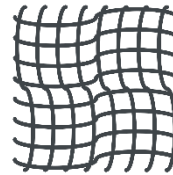
Customers wanted safeguards for those who might be adversely affected

- **Specifically, for households who might be financially vulnerable in the context of metering**

    - e.g. people on low incomes, esp. where in a large household

   - or people with certain health conditions which necessitate high water use (e.g. for dialysis)

A minority worried that metering would be used as an excuse to increase bills

- Often driven by cynicism about motivations of private sector in general, rather than specific concerns about Portsmouth Water

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They key benefit for rolling out smart meters concerns the ability to detect and fix leaks

We provided customers with information about smart metering.
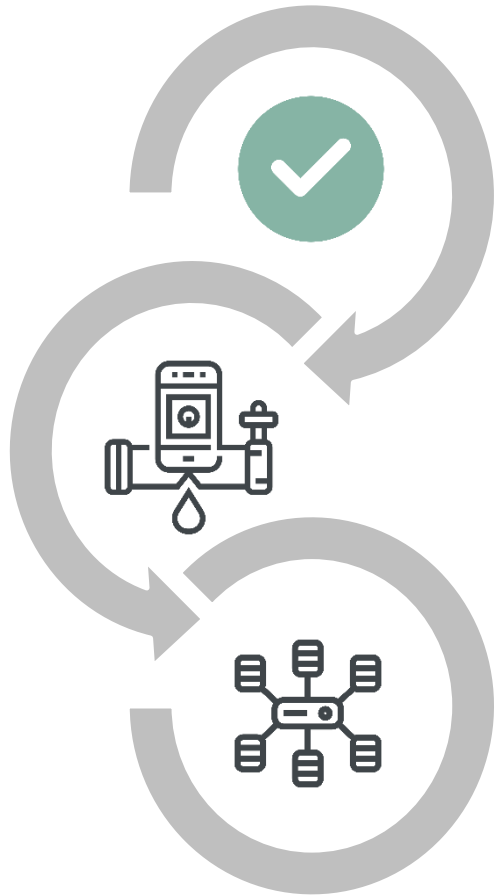
Once informed about its potential benefits, customers supported a more widespread rollout of water smart meters across Portsmouth

- Support was rarely very enthusiastic – but there were also few strong objections
- The consensus was that smart metering was the logical next step for metering – given the widespread digitisation of other areas of life

Support was primarily driven by the perceived benefits for the water network – particularly for fixing leaks, which is considered an important priority

- Support was often framed specifically in the context of the long-term water supply challenges which had been highlighted earlier in the deliberative research

Access to personalised smart meter data on individual water usage generally held limited appeal – only a minority said that they would value being able to review their own water use in detail

- A small minority mentioned other concerns about smart metering – incl. perceived health risks

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In principle, customers are happy to pay an additional amount on their bills to support those who struggle to pay

We provided customers with information about various support schemes that Portsmouth Water offers.

Support in principle

In principle, customers are very happy to pay to cover the cost of support schemes for those in less fortunate positions

- All the customers we spoke to considered this fair in principle

- Moreover, most said that they wanted to pay extra so that other customers would have access to such schemes

Strength of support

When they found out that 83p of their annual bill goes towards the Helping Hand social tariff, all the customers that we spoke to were happy pay this

- Some even suggested that they would be happy to pay more than this to ensure that others were given the support they needed.

Concerns

Customers want checks and balances on the schemes, to ensure that support reached only those who needed it (esp. amongst older, higher income customers)

Others flagged the cumulative financial impact of paying to cover numerous support schemes and other infrastructure investments – so wanted to ensure that overall customer bills remained manageable.
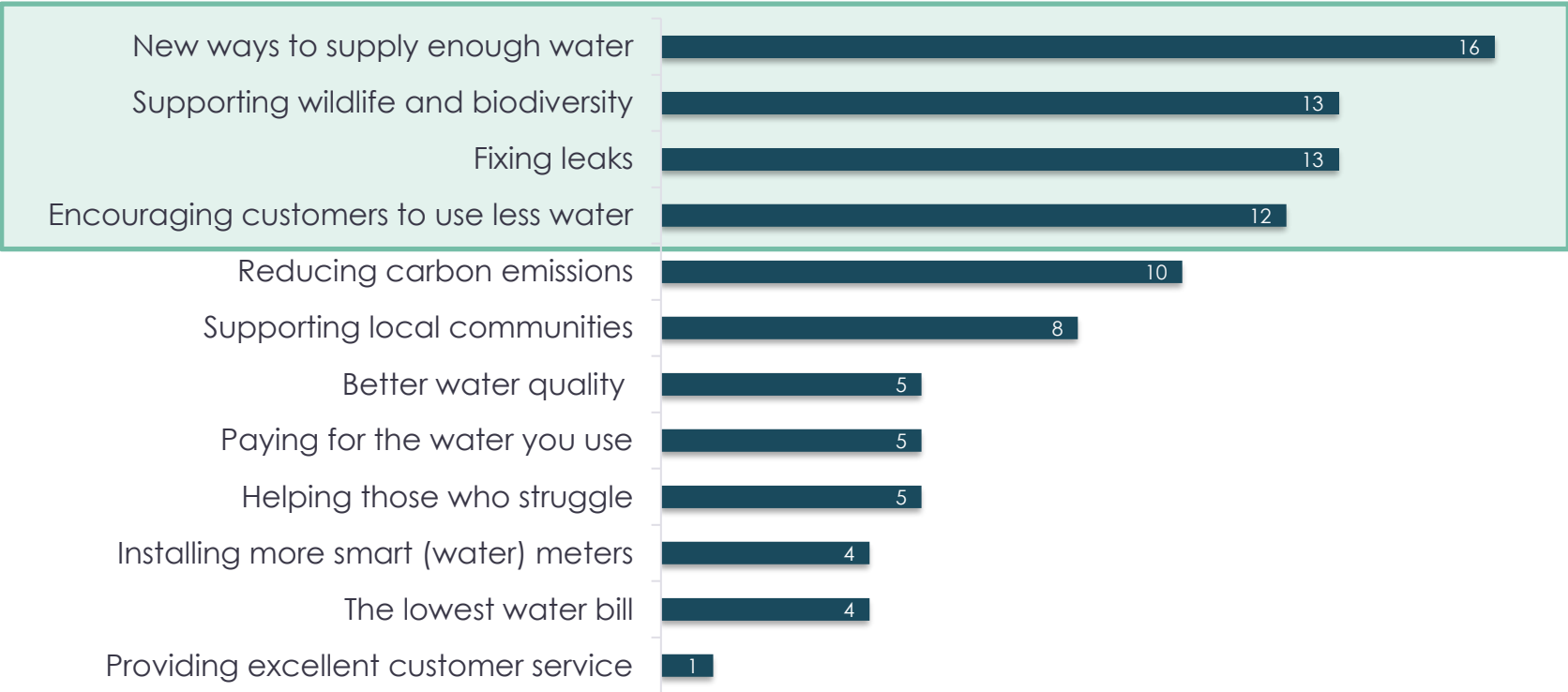
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Customer priorities for Portsmouth Water

During the online community we asked customers to prioritise these 12 options, without discussing in detail.

Online community priorities

Priority	Value
New ways to supply enough water	16
Supporting wildlife and biodiversity	13
Fixing leaks	13
Encouraging customers to use less water	12
Reducing carbon emissions	10
Supporting local communities	8
Better water quality	5
Paying for the water you use	5
Helping those who struggle	5
Installing more smart (water) meters	4
The lowest water bill	4
Providing excellent customer service	1

Task description: We've outlined below some further detail on potential priorities for Portsmouth Water over the next 5 years. There is further information on each in the attached photo. Please select your top 3 priorities for the company from this list. (n=32)

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When prompted, 'Fixing leaks' was felt to be the most important

Upon discussing further in the focus groups, customers were able to better weigh up the pros, cons and impact of the priorities

1 Fixing leaks — Upon reflection customers believed fixing leaks to be a key priority. This was seen as a useful short term solution, but also a sustainable long term fix

2 Reducing carbon emissions — Customers decided reducing carbon emissions throughout PW's operations was also important. This was related to efforts taken generally to save the planet and seen as the best way to achieve this.

3 Encouraging customers to use less water — Respondents realised some of the responsibility lies with the customer and this can be tackled through education programmes. This is seen as a long-term and accessible option.

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Summary slide

Higher importance	Medium importance	Lower importance
Fixing leaks	Helping those who struggle to pay	Keeping bills as low as possible
Reducing carbon emissions	Supporting biodiversity and wildlife	Better water quality
Encouraging customers to use less water	Paying for the water you use	Supporting local communities
New ways to supply water	Excellent customer service	Installing more smart (water) meters

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Fixing leaks

- **Waste averse** – customers were opposed to the idea of large amounts of clean water being wasted

- **Lose authority on water resources**– some claimed Portsmouth Water would lose authority as a leading force on water resources if they didn't first address their issues *"If we're talking about how much water we use they have to lead by example - they're just wasting water that's there" (HH customer, Younger ABC1)*

- **Large quantities of water** – acknowledgement that this would save a lot

Reducing carbon emissions

- **Big company** – perception that large companies like water companies must do their bit to help tackle climate change

- **Large impact** – customers thought reducing carbon emissions was vital for addressing climate change *"It's one of the biggest things companies can do for climate change" (HH non-customer/future billpayer)*

- **Government responsibility** – some feel it's foremost a governmental responsibility for regulating

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- **Low cost** – seen as an efficient way to help water resources
- **Sustainable and easy to pursue** – long term fix for future generations and clear education options to pursue
- **Concerns about fairness** – some concern that is unfair to expect certain people to reduce water due to mitigating circumstances (e.g. vulnerabilities)
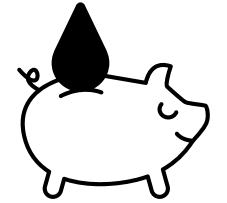
New ways to supply enough water

Higher importance

- **Circumstantial** – want to understand more about the urgency of the issue – this directly impacts its importance *"It depends on how much of a crisis we're in - if we're going to run out then it's really important isn't it"* (HH customer, Younger ABC1)
- **Unimportant for those unaware** – those unaware of wider context deem it less important *"For me personally, the tap runs every time I turn it on, I've never heard it on the news that we don't have enough"* (HH non-customer/future billpayer)

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Helping those who struggle to pay
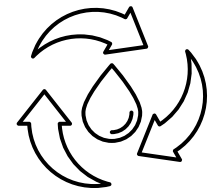
- **Important to help where you can** – after reflecting on various social schemes most agreed it was a good idea and important to continue
- **Shared responsibility with others** – some believe it should primarily be governmental responsibility; but until it is, Portsmouth Water should continue to take responsibility

Supporting biodiversity and wildlife

- **Mixed responses** though consensus was that the environment is important, customers viewed biodiversity and wildlife with different levels of significance
- **Part of green programme** – some see it as a vital part of a environmental agenda alongside reducing carbon emissions
- **'Sideline issue'** – some see it as not a main environmental focus

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Paying for the water you use
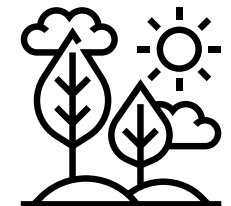
- **Fairness** – fundamentally feels like the fairest way to charge people, even if you'd prefer to continue on a fixed tariff
- **Complementary** – customers think this supplements some of the other priorities by reducing usage and cutting costs *"You're going to be killing multiple birds with one stone with that one" (HH non-customer/future billpayer)*
- **Not as urgent** – sense that this should be secondary to other priorities that feel more pressing and more impactful

Excellent customer service

Medium importance

- **People value customer service** – customers want service standards to remain high, but recognise that it is already good and should therefore not be a top priority *"No matter what company you are you've got to have good customer service, that's just standard" (HH non-customer/future billpayer)*
- **Only important occasionally** – interactions with Portsmouth Water are minimal, so not as important as it might be for other companies that you're in regular contact with **Minority mention of poor service** – a small number who have had bad experiences believe it's a high priority

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Keeping bills as low as possible

- **Already successful** - though this was seen as important generally many of our respondents commented on the already low price of Portsmouth Water bills and thus prioritised it lower
- **Important for vulnerable customers** – respondents hope vulnerable customers are helped already

Better water quality

- **Not urgent now –** most are happy with the water quality they get *"I'm pleased with the quality now" (HH customer, Older ABC1)*
- **A few mention poor quality water** – a small minority mention water being hard or having a stale taste; for them this should be higher on the priority list

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Supporting local communities

- **Nice bonus** – supporting local communities was seen as a desirable addition to Portsmouth Water's operations, though not a key component
- **Relatively less important** – compared with broader environmental/social issues this was lower on customers' agenda
- **Seen as charity work** – some believe it should first be governmental responsibility/ others' responsibility

Installing smart water meters
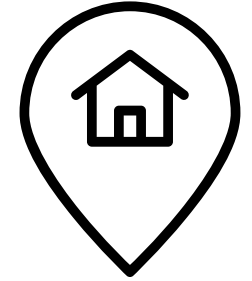
- **Low importance** – though a lot of customers were keen for smart water meters, the direct benefits to them are around interest
- **Minority very keen** – a minority of customers who were enthusiastic about data were very keen to have a smart meter installed to monitor their behaviour
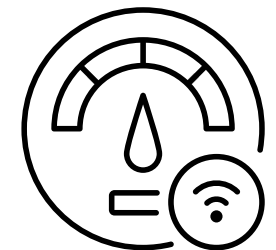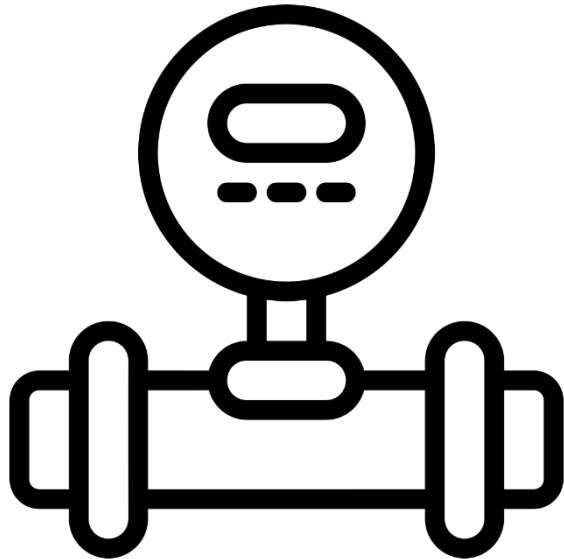
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Appendix: stimulus

Metering means that customers only pay for the water they use (as oppose to paying a flat rate). This should encourage customers to be more careful with water, therefore helping to reduce the pressure on water resource for the region as a whole.

Smart meters offer additional benefits in dealing with the water supply challenge. They provide information on how much water you're using in real time.

The key benefits to smart meters are:

- They help customers understand their usage in even more detail, helping them to be more careful with the water they use

- They help the water company see how water is being used across the network and can help identify leaks that may be difficult to find as they are not above ground

Smart metering typically reduces water usage by about 15-20%.

Arrears Assist: if you have arrears on your account of £300 or more and have not been making regular payments to your account it may be possible for you to apply for help under the Arrears Assist Scheme.

Helping Hand – Social Tariff: Helping hand is a tariff for customers who have a low income or are in receipt of certain benefits. If your application is successful, your water bill will be capped at the minimum charge for the year.

WaterSure: WaterSure is a capped tariff for customers who have a water meter and meet the requirements (receive certain benefits and either have 3 or more children at home or a member of the household requires use of significant amounts of water due to a medical condition).

Payment holiday: You can apply to have a three month payment holiday where no payments need to be made within that period.

- **Fixing leaks:** Portsmouth Water is one of the top performing UK water companies for low leakage rates. We are making big improvements in finding and stopping leaks, but despite this, millions of litres of water still leak from our 3,300 km network of pipes each day. A wholly leak-free network is impossible to achieve with today's technology, but how important is it for you that we invest even more to ensure leaks are minimised?

- **Helping those who struggle to pay:** For some people, times are tough and it can be a struggle to pay the water bill. We already help over 10,000 people in genuine need each year by reducing their bill. We could do more to help these people, but it would mean asking our other customers to pay a little more to help. How important is it for you that we do more to help those struggling to pay?

- **Supporting local communities and improving local environments:** We do more in our region than just providing water. For example we're raising money for local charities, establishing new woodland near our Havant Thicket reservoir site, and improving biodiversity at our sites. How important is it for you that we do more to support local communities and local environmental initiatives?

- **Helping you use less water:** On average, Portsmouth Water customers use up to 20% more water than people in other parts of the South East. Using less water can have lots of benefits like avoiding water shortages, reducing impact on the environment, and keeping bills lower by reducing the cost of investment to supply more water. How important is it for you that we help you find ways to save water in your everyday life?

- **New ways to supply enough water:** Our region is officially 'water stressed' - there's a risk of not having enough water to satisfy demand in a severe drought. Most of our drinking water currently comes from chalk under the South Downs, but taking more water from here to increase supply would harm the ecosystem and wildlife. How important is it for you that we invest in new ways to supply water?

- **Paying for the water you use:** At the moment some of our customers pay fixed rates for water no matter how much water they use, while others pay based on a meter reading of how much water they use. How important is it for you that all customers receive a bill based on the water they use? (Support would continue for customers who genuinely struggle to afford their bill)

- **The lowest water bill:** Portsmouth Water have the lowest bill for supplying water of any water company in England and Wales. Last year our average annual bill was £104, which is £90 less than the nationwide average. How important is it for you that we keep your bill as low as possible?

- **Better water quality:** The water we supply to your tap is high quality and more than 99.9% of the water samples we take meet strict water regulations. On very rare occasions the chlorine we use to make sure your water is safe to drink can affect the taste and smell. How important is it for you that we invest in improving water quality to reduce instances of unusual taste and smell?

- **Supporting wildlife and biodiversity:** ensuring that water sources that are home to wildlife and important habitats are well-managed.

- **Reducing carbon emissions:** investing in renewable energy and ensure that processes for supplying water and treating waste water are managed to minimise the energy required and impact on the environment.

- **Providing excellent customer service:** putting time and investment into our customer service offer and making sure that Portsmouth Water are providing the best service possible to customers.

- **Installing more smart (water) meters across the network:** so Portsmouth Water can understand water usage behaviours better and so that they can more quickly detect and stop leaks,