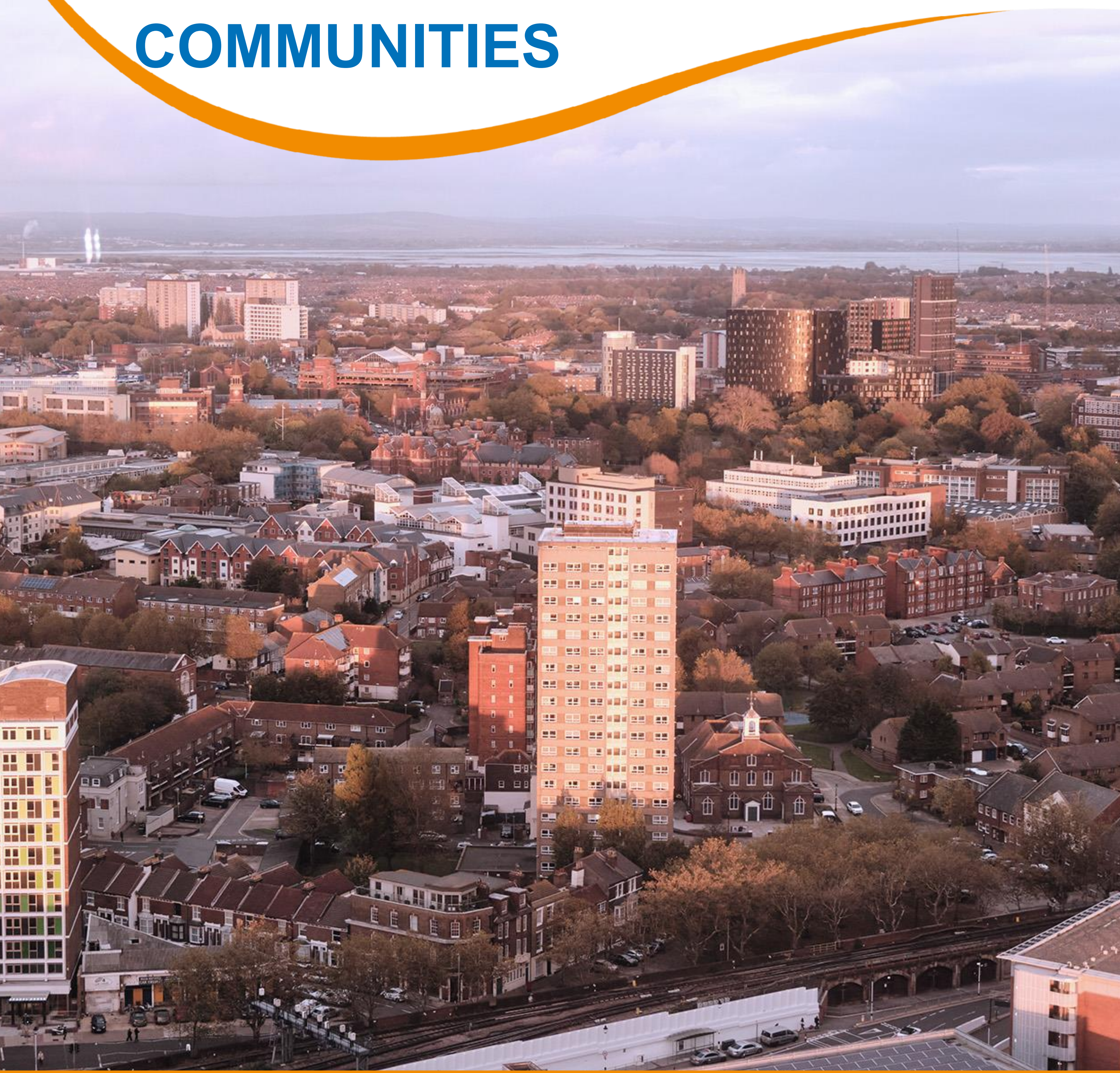
BUSINESS PLAN 2025 TO 2030

PRT03 ENGAGING AND UNDERSTANDING OUR CUSTOMERS AND COMMUNITIES



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1. AT A GLANCE

Engaging with our Customers and Communities

This document draws together the key engagement that has helped to inform and shape our business plan resulting in a plan that is acceptable and affordable to our customers.

Following on from PR19 engagement we adapted and evolved to take account of the feedback we received to ensure that we not only improved but also met Ofwat's PR24 methodology fully.

It explains how we have used our embedded Engagement Strategy introduced in 2021 to ensure that we have a strong body of evidence to inform the business plan.

Our new strategy is linked together with our BIG conversations which help us to focus on five key themes of:

Core Service | Affordability | Resilience | Environment | Social Purpose

With this new approach to engagement collecting a broader and richer set of insight we show how we have implemented our new triangulation process that helps us to utilise insights and understand when they are conflicting whilst also ensuring that the correct weight is applied to the insight.

These processes will continue and will help us to prepare for our future business plans whilst also informing our service delivery plans.

We have also linked together an assurance programme that has helped us to ensure that we are delivering on our processes as well as ensuring a clear line of sight between our insight and decision making through to the final business plan including:

- Our 25-Year Vision
- Our Long-Term Delivery Strategy
- Our AMP8 Business Plan

This new approach addresses feedback from regulators and our Customer Scrutiny Panel and ensures alignment with the PR24 methodology.

We have 3 key phases of engagement which feed into the business plan and there has been multiple inputs of insight into each phase to ensure that we make the right decisions for our customers and communities.

- Phase 1 – Focuses on ensuring that customers priorities and preferences are understood and develop our company vision alongside starting to develop our long-term delivery strategy. It additionally tested our long-term ambitions as an organisation.
- Phase 2 – Establishes the potential plan activities and customer choices. This phase didn't just focus on some high-level activities but always ensured that we presented customers with real activities, costs, and outcome impacts. Customers where always presented with high, medium, and low options so that they could more easily compare options as choices.
- Phase 3 – Acceptability and Affordability of our plan. We have long recognised the importance of affordability, and this remains at the heart of our vision maintaining the lowest cost bill for water supply services in England and Wales. This is particularly critical in the context of the current environment, and we know it's a careful balance to meet our customer expectations alongside still being able to afford the bill.

Our plan has focused on four key areas in terms of areas which were based on our phase 1 outputs. The four areas are:

- Improving the environment
- Lead pipe replacement
- Smart metering
- Leakage

Whilst we weighed up the bill impacts from our ‘must do’ activities, we used our phase 2 engagement to help us design a plan that would deliver our longer-term ambitions, would meet our customer expectations yet be affordable. As customers did not choose the must do activities, we challenged our own efficiency of what we will deliver in our base funding and balanced out additional investments ensuring that it was necessary to undertake that investment to meet our chosen pathway.

We throughout this period also tested our bill impact and profile along with a specific research topic relating to Small Company Premiums.

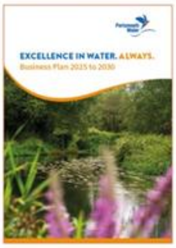
During phase 2 we had strong support from customers on our chosen plans which provided a stronger and robust business plan to move into our phase 3 engagement of acceptability and affordability.

Despite the current external financial environment, we achieved an extremely positive result for both elements of the plan. 76% of customers found our proposed plan for water supply services acceptable. Only 29% of customers said our proposed plan would be difficult to afford.

Our engagement approach is highly robust, and we have summarised how our approach has met the high quality standards set out by Ofwat in its methodology.

2. DOCUMENT MAP

Business Plan to 2030



PRT01
EXCELLENCE IN WATER. ALWAYS.
Business Plan 2025 to 2030

For the full navigation plan and documents visit:

portsmouthwater.co.uk/business-plan-2025-2030

Supporting Documents

PRT02
Delivering Havant Thicket Reservoir for Our Customers and the Region

PRT03
Engaging and Understanding Our Customers and Communities

PRT04
Delivering for Our Customers and Communities

PRT05
Delivering Outcomes for Our Customers

PRT06
Managing Our Resilience in the Long Term

PRT07
Our Investment Plan

PRT08
Delivering Our Investment Plan

PRT09
Securing Value for Money

PRT10
Innovation to Enhance Our Service Delivery

PRT11
Addressing Affordability and Vulnerability

PRT12
Accounting for Past Performance

PRT13
Aligning Risk and Return

PRT14
Our People

PRT15
Board Assurance

Vision and Our Long-Term Plans

PRT16
Our 25-Year Vision (consultation version)

PRT17
Water Resource Management Plan (revised)

PRT18
Long-Term Delivery Strategy 2025-2050

3. OUR ENGAGEMENT STRATEGY

A. Our Approach to Engagement

As an essential service provider, providing water as a regulated monopoly we recognise the need for good engagement of our customers, stakeholders, and communities to help us understand our region's needs but also gain insight from others to shape how we both plan and deliver our future ambitions.

Engagement enables us to not only identify insight to support what we aim for and want to achieve but it also provides an opportunity to identify opportunities and co-create solutions with our partners and customers, which in turn provides an increased chance of successful delivery.

In this document we will show how we have adapted and evolved from our PR19 approach and how the insight that we have obtained from our embedded strategy has shaped our business plans.

Our approach has adapted throughout AMP7 to meet best practice approaches and to learn from the comments made by Ofwat in its review of our PR19 engagement.

We wanted to ensure that we adapted in a meaningful way with a focus on more ongoing insight testing that allows us to see understand the most up-to-date views of customers in what is a very fast-moving external environment for our customers.

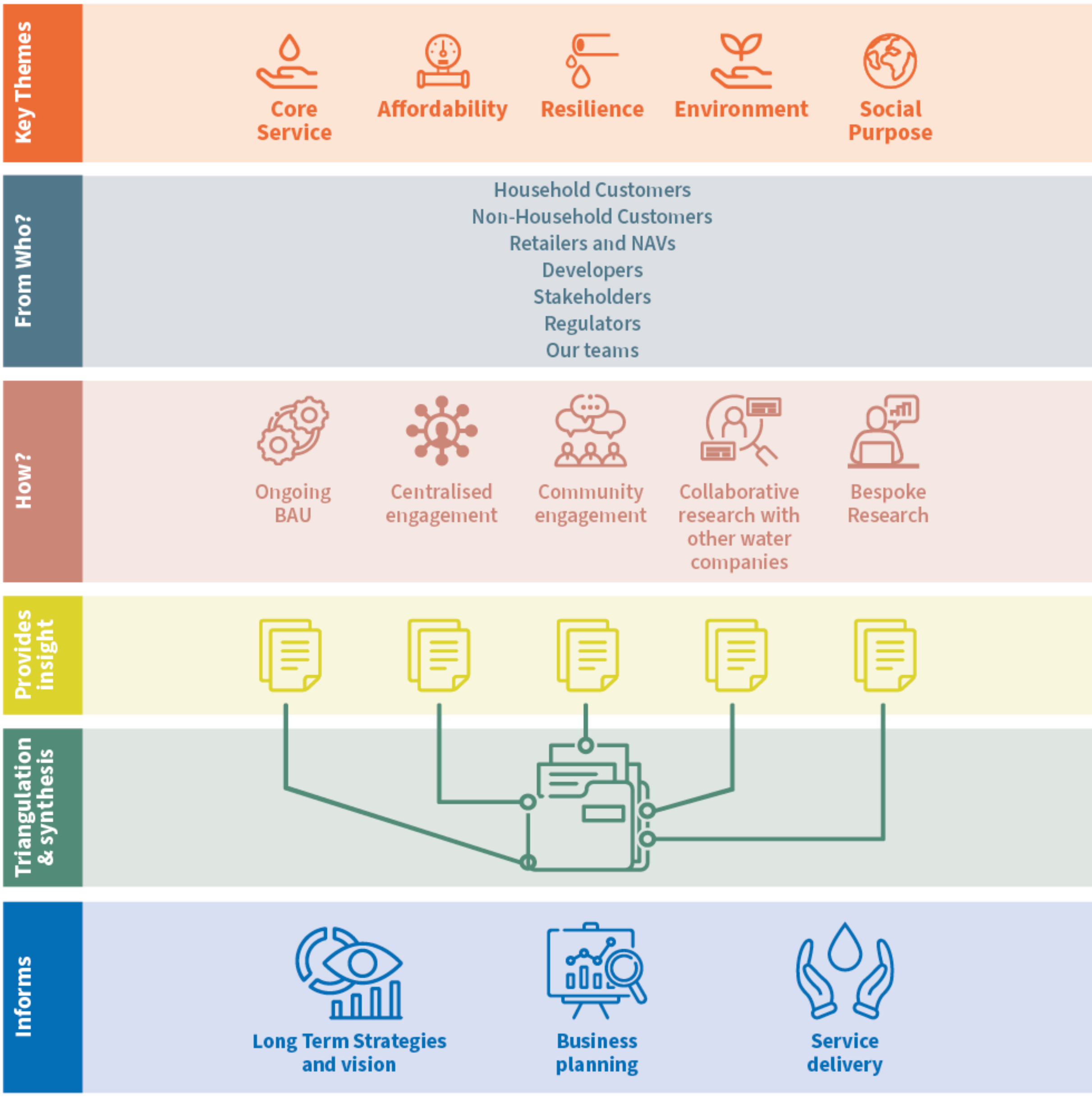
To develop our engagement strategy, we have integrated all our learning and sought expert input from specialist research companies which enabled us to draw on their experience of other water company programmes, cross sector research approaches and a wealth of expertise in developing strategies.

Implementing our new strategy for AMP7

In 2020 we implemented our new strategy which incorporated all of that learning and best practice whilst ensuring that it met the current and future needs for us and the changing relationships that we want to create with our customers and communities.

This new strategy focused on expanding our insight gathering and providing an embedded approach to drive not just our business planning processes, strategies and processes but also our day-to-day service delivery putting customer and community views at the heart of our plans and approaches.

Figure 1: Our Engagement Strategy



Key themes – By undertaking a mapping exercise we start by grouping together the key themes for us as a company and for our customers. We know from our work with customers and others that everything we do can fit into one of these key themes, whilst ensuring that we have 'fit for future' model and approach.

Who – We have a broad range of customers and stakeholders and not everything is relevant to all groups. By mapping our activities to key groups, we can engage with the right groups on the right topics.

How – We gain our insight from five key workstreams, which are:

- **Ongoing BAU** – we undertake ongoing engagement through many of our day-to-day activities which covers a broad range of our business including complaints, debt analysis, our Customer Scrutiny Panel, cross sector work and direct ongoing surveys of our customer base relating to the services they have received.

- **Centralised Engagement** – Working with regulators and across the water sector in England and Wales we have centralised some key research elements for consistency and efficiency.
- **Community Engagement** – We undertake work with many community groups on a day-to-day basis which provides a perfect opportunity to gather insight about current and future aspects of our work. For example, working with the farming community with our catchment management programme or our vulnerability stakeholders. In addition, we work with stakeholders such as Housing Associations and local councils.
- **Collaborative Research** – We have shared research findings across the South East water companies to enable us to synthesise this research in addition to working at national level to understand approaches to insight activity.
- **Bespoke Research** – Where specific insight inputs are required and not already known by the company (or the known data is no longer relevant then we have commissioned research with our partners.

What we learnt from AMP6 and PR19

We have taken the learnings from PR19 and adapted our approach to enhance and embed our engagement within the organisation.

Our learnings came from three primary sources:

- Ofwat
- CCW
- Our Customer Scrutiny Panel (as then it was called Customer Challenge Group)
- External reviewers

Ofwat's feedback from PR19

Following the PR19 assessment, Ofwat provided each company with a view on their customer engagement and key aspects were identified to enable companies to improve their approaches, which is set out in Table 1.

Table 1: Ofwat PR19 feedback

Identified challenge from Ofwat	How we have adapted our approach
More evidence on customers being engaged on longer term issues and views being incorporated in Business Plan.	Our engagement strategy has focused on the six key strategic areas for our customers, and this is the backbone to our engagement strategy, engaging over time and deeper than we ever have before through our ongoing Customer Advisory Panel (CAP) research. We have built into every part of our plan how decisions have been informed by insight.
More evidence on comparative information used to inform customer choices during PC research.	Materials have been adapted to meet the high quality standards defined by Ofwat for research.
More evidence on use of tracker surveys and ongoing complaints analysis outside of PR process to understand customer priorities and relevance of outcomes.	Our embedded Customer Advisory Panel has focused on both 'big conversations' and also barometer analysis on topics such as wellbeing, affordability and cost of living.
Small number of customers engaged with.	Our approach remains proportionate for our customer base, has been adapted to take account of more on-going engagement and has been independently assured to give us confidence we are meeting Ofwat's expectations of high quality.
Company's approach to triangulation – lack of independent assurance and unclear how ODI rates reflect customer views.	Independent assurance from Sia Partners has been designed across the workstream activities and outputs and ODI rates are driven from a clear process set by Ofwat from centralised research.
Lack of segmented research techniques.	We have implemented a customer segmentation strategy which is used across all relevant research.
Lack of direct engagement with vulnerable customers.	We have engaged directly with customers in vulnerable circumstances.
Insufficient evidence that company understands how customer behaviour may and should influence its approaches to resilience.	This is a key theme of our strategy.

Ofwat also fed back the following feedback to our research that was used in PR19:

Table 2: Ofwat PR19 assessment on research and methods

Ofwat's assessment feedback specifically for PR19 research
Small number of customers engage with.
Lack of variety in engagement methods and how used.
No segmentation applied to engage including vulnerable customers.
Uncertainty whether full breadth of customer base is represented.
Lack of evidence that company is adopting the theme of customer participation.

Consumer Council for Water ('CCW') feedback from PR19

CCW published key recommendations from PR19, though these were industry wide comments.

Table 3: CCW PR19 assessment on companies

CCW Industry Recommendation	Embedding into AMP7
Be clear how engagement informs Business Plan and be transparent on extent of consumer influence – if it's not possible to act on the outputs be clear how company has learnt from it and share across industry.	We have implemented embedded engagement through our strategy including the development of a triangulation process.
More focus on BAU engagement – a wider programme of meaningful engagement to improve services.	Our strategy focuses on ongoing research and customer engagement as well as our capturing our own team's feedback into how we deliver our services.
More collaborative research on shared challenges to support innovation, reduce research gap between small and large companies and introduce consistency into research outputs.	We have collaborated on research, both actual research and sharing research methods and findings with both South East regional companies and through national sharing of information.
Companies should publish research materials and findings to make accessible to all.	The South East region shares research data on a SharePoint site making it accessible and available to all.

Approach (1) that CCW would like to see – reduce non-response bias – more consideration of how to involve seldom-heard customers who need more flexibility of approach.	Our research includes specific deep dives with customers who are harder to reach (vulnerable circumstances and affordability).
Approach (2) that CCW would like to see – reduce recall bias – more observational research on how people and household actually use water, disposal behaviours, how they engage with water environment and to use these to inform customer communications.	Whilst we have not undertaken specific insight in this area but our horizon scanning identifies the observational research undertaken by others and shared (such as the CCW Blue Marble water use in the garden research).
Approach (3) that CCW would like to see – close gap between highly informed consumers and average bill payer to ensure they support direction of travel – more sense checking of Business Plans with consumers not previously involved.	Our Engagement Strategy has ensured a broader reach that includes those customers that were traditionally hard to reach.
Approach (4) that CCW would like to see – create highly engaged research participants – more immersive exercises.	Our Customer Advisory Panel (CAP) is an ongoing panel of 1,000 customers who are involved with ongoing engagement and research.
Approach (5) that CCW would like to see – co-creation used more creatively to think outside the box.	Our BAU team works with stakeholders around key areas of the business including: • Farming and landowners • Vulnerability and Affordability Stakeholders • Educational institutions
Reduce research complexity to get meaningful views which can be used with confidence.	We have ensured that our research is aligned, utilising similar methods and approaches to support our approach to triangulation.

Customer Scrutiny Panel (was Customer Challenge Group ('CCG') feedback from PR19

Feedback from our CSP was predominantly relating to PR19 activities in response to which adaptations to that bespoke engagement programme were made.

We took the challenge that the group made relating to vulnerable customers through creating an annual Vulnerability Stakeholder survey.

Triangulation challenges

Several assessments were undertaken following PR19 which focused on triangulation. These were undertaken by industry experts commissioned by regulators such as Ofwat and CCW. It identified the following key triangulation shortfalls across areas of research. We have reviewed this and ensured that we have adapted our approach through our new engagement strategy design.

Table 4: Triangulation reviews

Identified challenge	How we have embedded into our AMP7 strategy
Selection of PCs and initial target setting relied on multiple sources of information.	Our new triangulation process ensures that there are multiple sources of insight but that these are synthesised and triangulated through a robust framework and process.
Ongoing challenge about Portsmouth Water's choice of approach to metering – even after PR19 adaptations the findings on metering were conflicting and not sure the results where robust enough to provide clear conclusions.	Metering is a particular issue that has been researched with customers and stakeholders robustly during AMP7 and the findings triangulated.
Following PCs and Targets research remainder of research relied on single sources of info.	Our new engagement approach has focused on utilising a broader range of insight and triangulation of the evidence base.
WRMP consultation was not statistically representative – therefore questioned weightings given to that research.	Our approach to triangulation ensures representative weighting on views.
Customer Panel (CAP) was not demographically representative.	In AMP7 we have recruited our new Customer Advisory Panel that reflects our customer base and weighting.
No formal triangulation process (scoring / weighting) – but felt transparency was sufficient to understand reasons for decisions.	Robust triangulation methods are embedded in our process.

In 2020 we developed our ongoing strategy for AMP7. This focused on embedding engagement into everything we do with the ambition of making our insight sources more wide ranging with a clear emphasis on:

- Considering the importance of engagement objectives, a clear reason for engagement and how we intended to engage effectively.
- Focusing on making our engagement embedded through both our day-to-day activities as well as our research approaches, enabling us to better understand a moving environment.
- Dealing with Ofwat's comments on where they believe that our research could be improved.

Our approach to gathering insight is no longer purely for creating our Business Plan but now supports all our strategic planning as well as our day-to-day service delivery.

We have embedded our engagement strategy for AMP7 into everything we do, capturing insight and customer views along the way and have implemented methods that enable us to continually test our customer and community views.

To support our engagement strategy, we have implemented our new research groups which include:

Customer Advisory Panel (CAP)

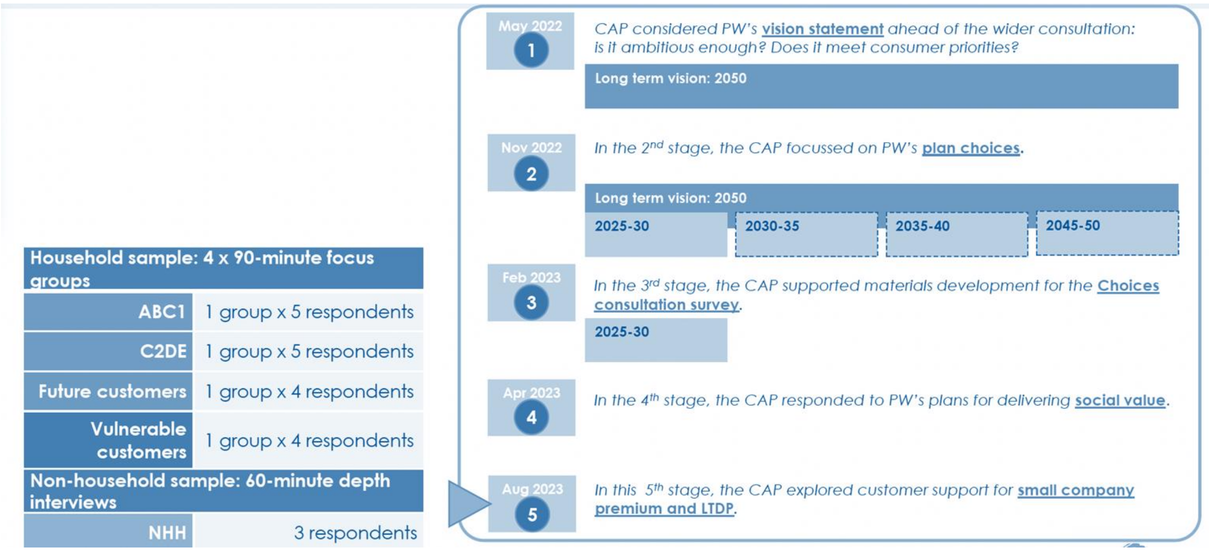
In 2021-22 we set up our CAP which is made up of business, household, and future customers.

This is a qualitative research group made up of:

- 10 household customers split equally between ABC1 and C2DE demographics.
- 5 future customers, being a group of customers who live with parents or are at university.
- 5 customers in vulnerable circumstances – with either financial or health vulnerabilities, including mental health.
- 5 non-household customers.

We utilised this panel through our specific business plan themes using the method set out in Figure 2.

Figure 2: Our method of CAP research



Barometer Group

A representative group of 1,000 customers that have signed up to take part in regular quarterly research surveys across AMP7.

Stakeholder Groups

Over the AMP we have continued to explore ways that we can better engage with our stakeholders particularly through our community partnerships. We have worked alongside stakeholder groups in areas such as:

- Catchment management
- Vulnerability and affordability
- Community engagement sessions such as those for Havant Thicket Reservoir

A key aspect of our embedded approach to engagement includes adopting insight from our **business-as-usual** activities. This includes:

- **Complaints analysis** – Increasing our understanding of what customers are unhappy about with our service or our strategy, review at an Executive level and a feed into our continuous improvement programme.
- **C-MeX** – increasing our understanding of customer scores and processes as a feed into improving service delivery and supporting our ongoing improvement plans.
- **UKCSI Benchmark survey** – Reviewing customer sentiments and scores across our service delivery.

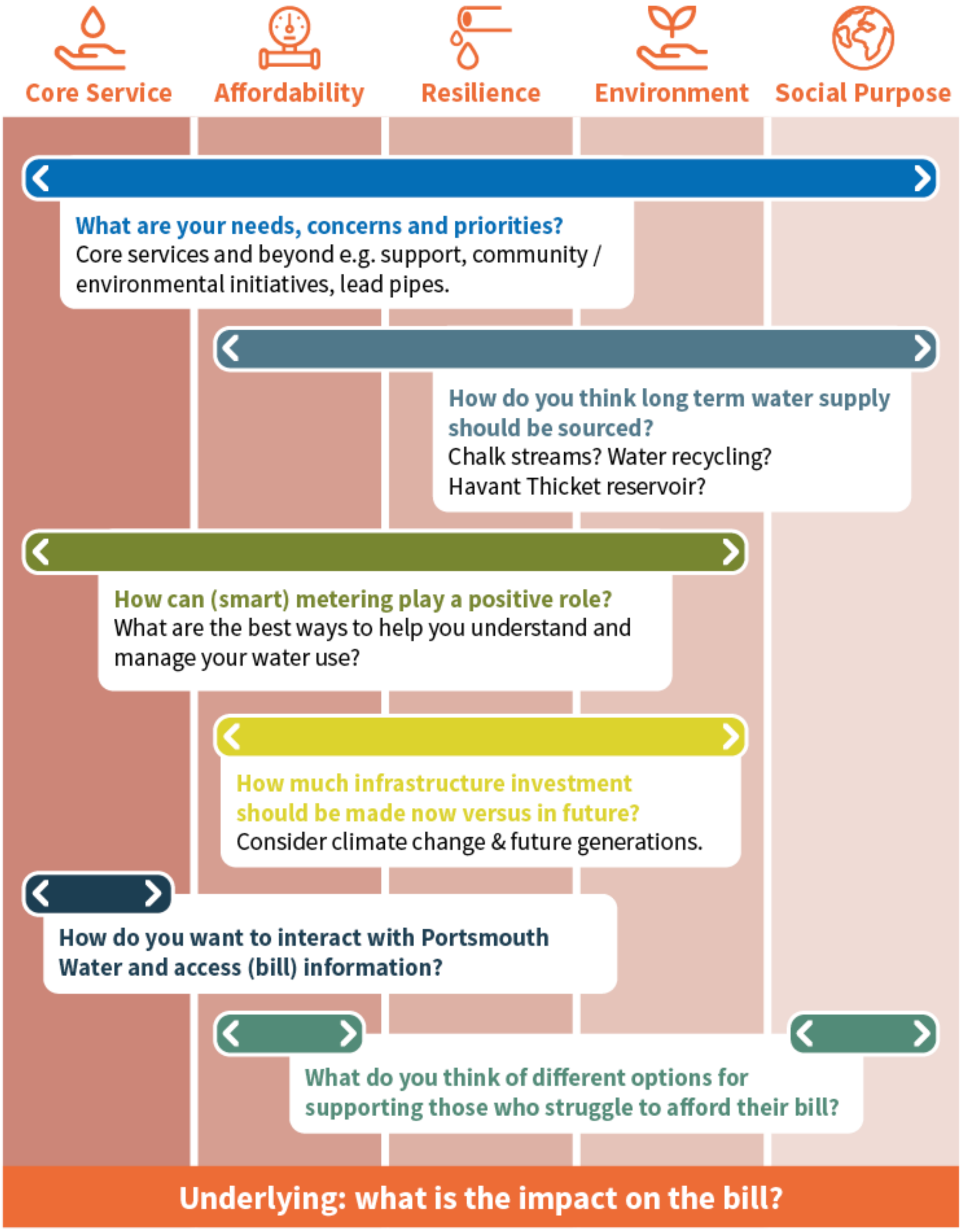
Creating key themes and linking to research

To ensure that we had a strong and robust continuous approach to obtaining insight we created a set of Big Conversations that specifically dealt with many of our ongoing requirements for future business planning. This insight is critical to enabling us to:

- Ensure that we are delivering what we need for delivering insight for our business plans and service delivery, it also supports our understanding of:
  - Regional variations in needs and priorities.
  - What they support and what they don't support.
  - What they can afford to pay towards the future services.
  - How they feel about fairness of charging between generations.
  - The solution types they prefer to see us using.
- Ensure that customer support for our plans will be achieved and to give customers a voice around:
  - The pace of activities.
  - What we do.
  - How we deliver through our adaptive plans.

These requirements are reviewed regularly through the AMP as well as annually to consider if additional elements may need to be added.

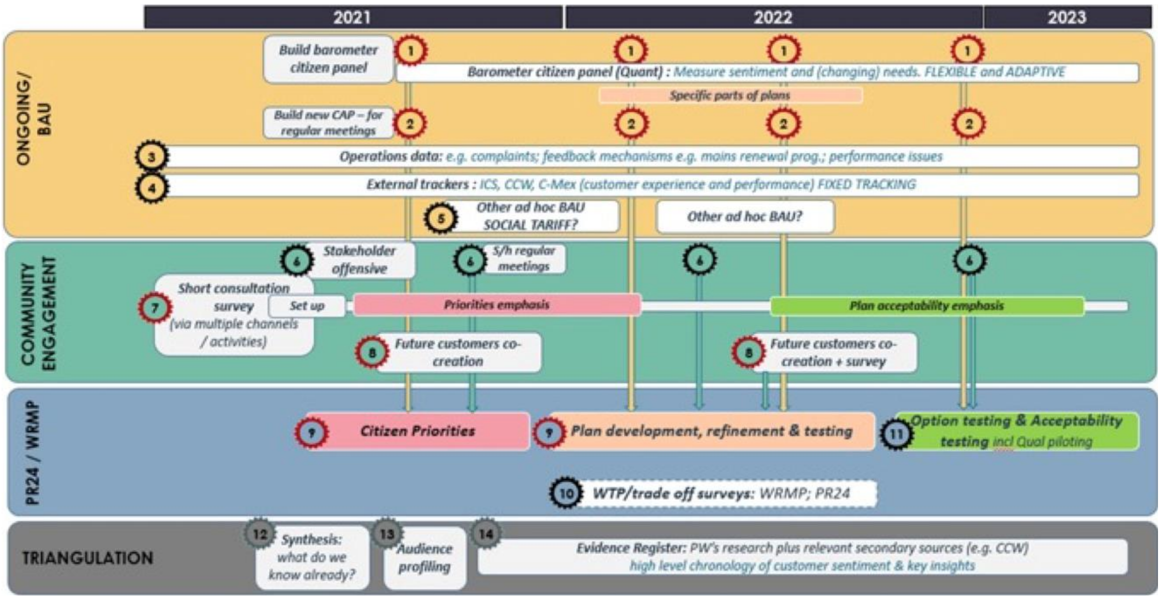
Figure 3: Big conversation framework



We have developed our research programme for AMP7 to ensure that we have a broad range of insight available to us to help ensure that we take account of all our customers' and stakeholders' views.

A significant level of insight has been created across a broad range of activities including specific ongoing engagement that was necessary for informing our business plans. These research elements are shown below.

Figure 4: How we have linked our Big Conversations together

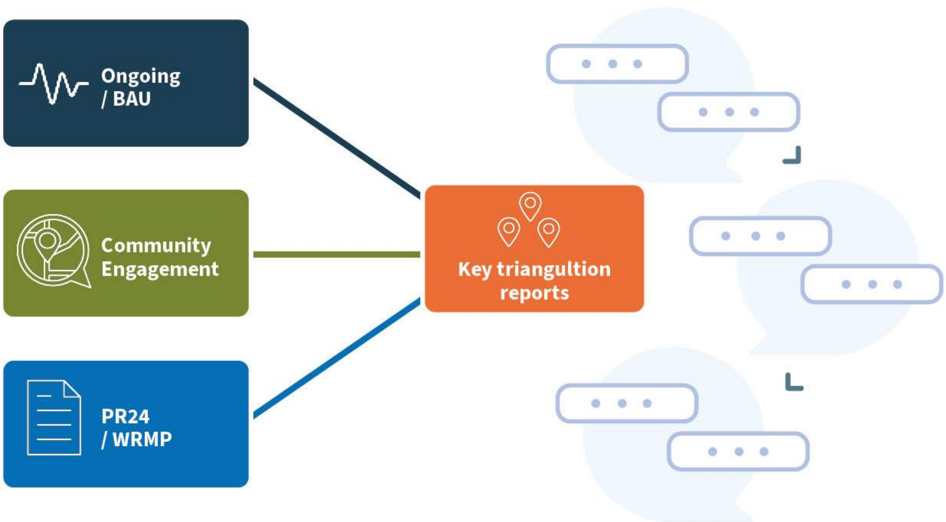


Our programme over the AMP was designed to help us understand customer and stakeholder viewpoints around critical areas of the programme as well as understanding trends and changes resulting from changes in the external environment.

Triangulation

A key area of improvement related to how we take account of a broader range of insight results; ensuring that we take account of insight established from differing participants, with different levels of understanding using different methods by synthesising results together.

Figure 5: Triangulation in the strategy



This approach has been developed in partnership with our research company to support our approach to synthesis and triangulation. The process that we have developed through the AMP ensures that we are able to consider all elements of research from multiple sources enabling us to determine customer and community views.

Figure 6: Triangulation in practice

Sharing our insight approaches and findings

A key aspect of Ofwat's high quality research standard (which is discussed in more detail in the assurance section) aims for research findings to be published and shared in full. As a company we have been fully engaged across the sector, and beyond, with sharing our research strategy, methods, and insight findings. This approach has enabled best practice and collaboration to be identified as part of that process.

We have achieved sharing through a number of routes:

- We played a key part in the South East companies' collaborative group, where we used a dedicated SharePoint site to enable other companies to see our research methods and outputs since 2021.
- We participated in the sector-wide collaborative research group where others shared their challenges and best practice through that group.
- We collaborated extensively with Southern Water as the wastewater provider for our customers.
- We have published all research, methods, and summaries on our website so that they can be used by others (both water companies and beyond) in their continual engagement approach.

We particularly collaborated with Southern Water in delivering our Acceptability and Affordability Testing due to the shared relationship that our customers have with them and ourselves.

This collaboration enabled us to particularly learn from research that had already been undertaken by other companies prior to our research. Likewise, they were able to learn from us, particularly as a result of our Barometer Survey which was a constant 'dip-test' for many common themes such as affordability. We were also able to learn from reviewing Thames Water early customer priority work and South East Water's published State of the Nation report.

To support our approach the South East collaborative group met at least bi-monthly to share the work that each company was doing. This worked particularly well due to the common themes that where prevalent in the South East, such as being a water stressed region. It additionally supported the work that had been jointly undertaken on water resources through Water Resources South East.

How we used insight to shape our plan

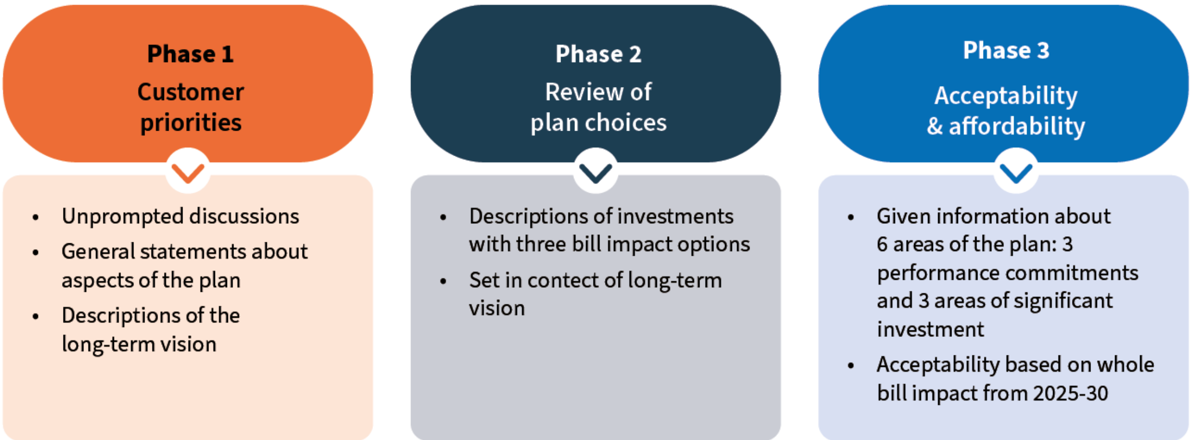
Our plan is built on ensuring that we have listened to our customers, stakeholders, and the wider community's expectations. The insight gained has been incorporated into our decision making both in challenging our thinking, or in constraining our plans which are not always supported.

Independent assurance of the research and approach that we have undertaken give us confident that it is high quality and utilises all of the principles and methods required by the PR24 methodology.

Our insight has enabled us to reflect the many priorities for a broad range of our customers and stakeholders, as well as the regulatory and legislative requirements of our plan.

We describe below how it has informed our plan, which is also summarised below.

Figure 7: Three key phases of Business Plan



Phase 1 – Understanding priorities

Our initial engagement relating to customer priorities was obtained from a range of customers, stakeholders, and regulators we identified the key priorities for us to deliver.

This fed our Vision along with activities which were 'must do' activities for regulators, legislative compliance or the WRMP (including WRSE) plan. These 'must do activities', although explored later with customers, were fast-tracked into the plan.

We assessed our must do business plan activities alongside all of our additional business plan activities and considered these costs through the lens of affordability (based on our early research in bill profiles). This approach helped us to align activities in our Long Term Delivery Strategy and enabled us to move into a further phase to work with our customers and stakeholders to help us determine our draft plan choices.

Phase 2 – Plan choices

We presented customers with a number of plan options, costs, and timelines to consider across a number of forums. This also included us considering and testing our bill profiles with our customers based on delivery plans of those choices.

This identified the following key priorities and choices for our plan, which where:

- **Reducing leakage** – which had high support
- **Local environment** – Which had high support (with reservations on costs)
- **Reliable supply** – Support to maintain good performance
- **Lead pipe replacement** – mixed views of customers

This insight led to our draft plan which enabled us to move into our final stage of research and insight gathering that would help shape our plan.

Phase 3 – Acceptability and Affordability

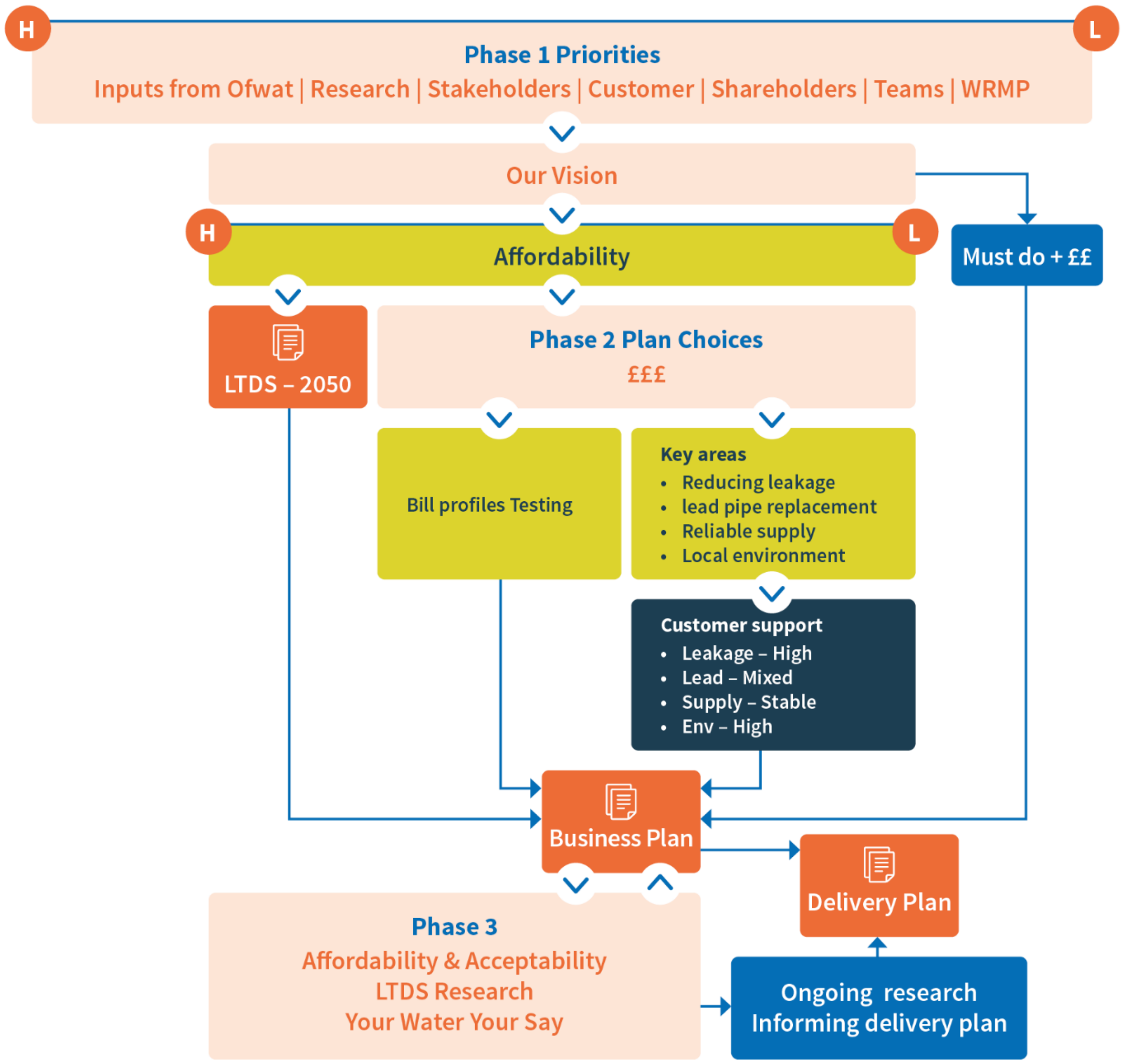
In this stage we used three key elements to support the final test of our draft plan. These focused on:

- **Acceptability and Affordability testing** - Ensuring that our business plan met our customers' views in terms of the outcomes we intend to deliver, the costs associated with those outcomes and how that will be reflected in their bills.
- **Your Water, Your Say session** - An opportunity for customers and stakeholders to hear about our company plan directly from the Executive team, and directly raise questions and concerns with them about our plan.
- **Long Term Delivery Strategy Research** - A final check (for now) on our Long Term Delivery Strategy through to 2050 and whether it meets customer and stakeholder expectations.

Any changes or adaptations have fed into our final plan

Ongoing engagement, which is embedded through our engagement strategy will continue to feed into our delivery plans. A great example of this relates to our engagement on metering, which has shown that our customers are cautious about metering. However, through further discussions this cautiousness is linked to concerns about increased bills and no current awareness of the support opportunities that will be available to them as a customer. All of these provide insight into how we need to engage with customers on metering and will help shape our delivery plan in the future.

Figure 8: How insight shaped our plan.



What insight has informed our plan

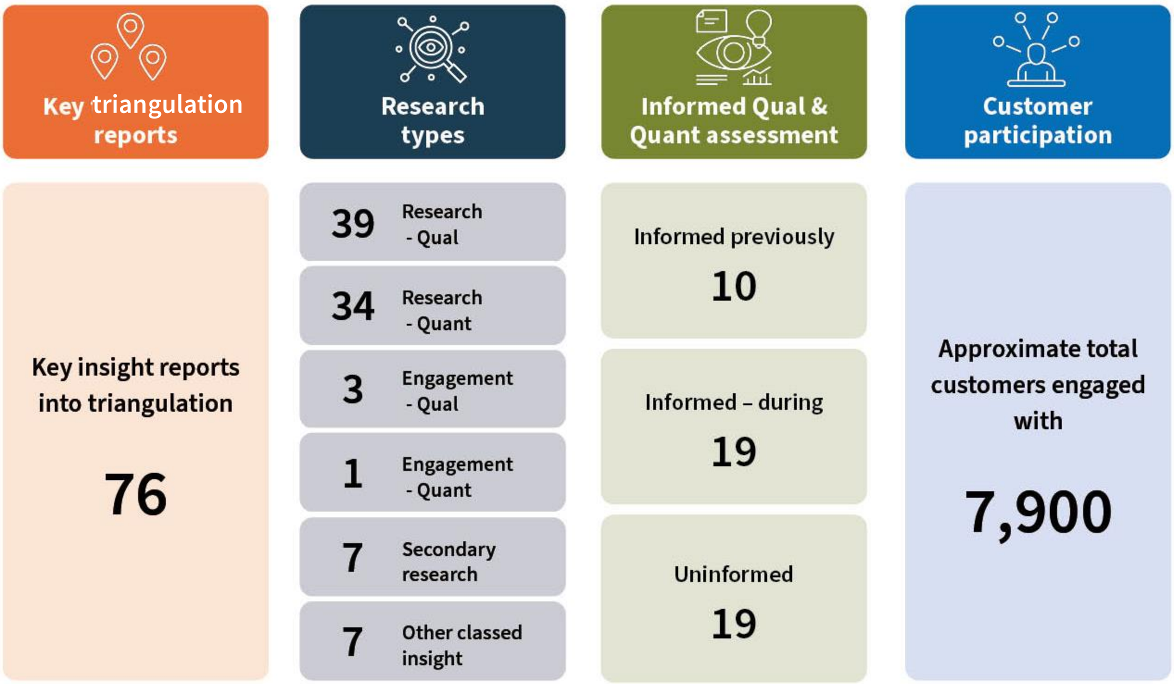
We have three key phases of our business plan that have been led by our customer engagement which inform our plan.

To inform our plan we have taken 76 key insight reports undertaken directly by ourselves, delivered by our research partner Blue Marble or third-party research that has been included as part of our synthesis and triangulation approach.

This research has been gathered across a broad range of methods, but we have strived to avoid single research points for key elements to enable us to ensure that we have a better understanding of customers into key areas that inform this plan.

We have summarised below the key research volumes and types along with our approximate customer numbers that have been engaged to help inform our plan.

Figure 9: Insight gathering methods.



We have created a golden thread of insight that has informed and flows through all of our plan, and which supports our chosen business plan activities.

B. Engaging on Phase 1: Customer Priorities.

Understanding our customer and stakeholder priorities and preferences is key for us to deliver an acceptable and supported plan. We utilised the following research to gain insight into customer priorities:

Table 5: Key evidence sources for priorities.

Description	Report Date	Audiences covered	Method	Geographic Focus	How informed are participants?	Sample size	Robustness score (1=Low to 5=High)	PW coverage score (1=Low to 5=High)	Total evidence score (Max 10)
Barometer 1 – Uninformed priorities	Apr 22	General (HH)	QT (online)	PW – all	Uninformed	700	4	5	**9**
Portsmouth Water Foundational Qualitative Research	Feb 22	General (HH)	QL (deliberative groups)	PW – all	Uninformed	36	4	5	**9**
Portsmouth Water Stakeholder research: Business plan priorities	Feb 22	Stakeholders	QL (online depths)	PW – all	Informed	7	3	4	**7**
Consumer Panel Barometer - Wave 2	Jul 22	General (HH)	QT (online)	PW – all	Mix informed and uninformed	574	4	5	**9**
Customer Advisory Panel - Report 1	Jun 22	General (HH)	QL (4 groups)	PW – all	Unformed	25	4	4	**8**
Portsmouth Water Vulnerable customers	Aug 22	Vulnerable customers	QL (online & f2f depths)	PW – all	Uninformed	18	4	5	**9**
Results from Vision Consultation	Oct 22	General (HH)	QT (online)	PW – all	Uninformed	87	2	4	**6**
PW Future Customer Panel 2022 Report FINAL	Dec 22	Future customers	QL & Qt (2-day event + online)	PW – all	Uninformed	20 + 247	4	5	**9**
Ofwat Collaborative ODI Research SP Results	Jan 23	General (HH)		National	Uninformed	?	4	5	**9**
Barometer 3 – affordability & smart meters	Oct 22	General (HH)	QT (online)	PW – all	Mix informed and uninformed	601	4	5	**9**
Barometer 4 – WRMP	Feb 23	General (HH)	QT Research (online)	PW – all	Mix informed and uninformed	434	4	5	**9**

Our Customer Priorities work was triangulated across a broad range of sources and is detailed in the *Blue Marble Synthesis Report 3 – August* 2022.

Some examples of the research that has been used as part of the triangulation and the insight we have established are summarised below:

PR24: Foundational Customer Research

This research was undertaken prior to February 2021.

Research objectives:

To develop a set of principles that customers and citizens want Portsmouth Water to adopt throughout the plan and providing clear links to planning decisions.

To touch on all of the ‘Big conversations’ to understand:

- Current awareness and 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.
- Unprompted expectations of Portsmouth Water in addressing future challenges.
- Prompted response to specific issues facing Portsmouth Water and (uncosted) options.
- Bill sensitivity relating to (broadly costed) options available to Portsmouth Water.

Research Method:

- Qualitative methodology with cross section of customers (household, non-household, future customers and older non bill payer).
- Online panel.
- Follow up deliberative group of 35 participants.

Key insight obtained:

Insight we gained

We have a strong reputation with customers for providing a good service with affordable bills.

There is confusion between us and Southern Water around billing and some confusion over sewage spills.

Customers don't understand well water scarcity issues being faced.

There is support for investing in ‘new water’; there is also an expectation that we focus on managing demand as well.

Supply options reflected what companies saw in the Water Resources South East research about the wider South East region. Our customers specifically wanted approaches that are:

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

Based on the above principles, customers are looking for us to fix leaks, reduce carbon, and encourage customers to use less water.

Bill sensitivity is clear, but customers are aware they need to pay for some future investment now, even if they don't benefit from that investment now. Most of them don't see the need for large bill increases though.

There was little response differential between demographics.

Stakeholder Research: Business Plan Priorities

This research was undertaken prior to February 2022.

Research objectives:

To better understand the relationship with between us and stakeholders.

Understand stakeholders' views on our responsibility towards local issues including the local economy and addressing the impacts of Covid-19.

Establish what areas of investment should be prioritised in the next 5 years.

Research Method:

- **45-minute telephone or Teams interviews with seven stakeholders.**
- **Local stakeholders consisting of**:
  - Local government
  - Consumer representative
  - Business representative body
  - Trade association

Key insight obtained:

Insight we gained	Prompted priorities from this group were: High Priority: • **Do more to help those struggling to pay** – publicise schemes more and offer more flexible payment. • **Fix leaks** – mentioned spontaneously by many prior to seeing priority areas. Avoiding wastage and presenting us as environmentally friendly. It was recognised that fixes need to be economically efficient but want to ensure that its calculated fairly. • **Help customers find ways to use less water**. Seen as a way of avoiding jumping straight to investment in new sources and solutions. Medium Priority: • **Keep bills as low as possible.** Many recognised we already have the lowest bills in country but there is some concern that low bills may also mean customers place lower value on water and encourage higher usage. • **Charge all customers based on usage.** Principle of paying for what is used is important. Recognised metering as a compulsory measure, but emphasised need for good communications. • **Support local communities and improve environment.** Both are considered important but in different ways. We are seen as considerate and proactive with regard to environmental issues and already support communities through CSR initiatives. Concerned too much focused on Havant Thicket area. Low Priority: • **Invest in improving water quality.** It is felt that we should maintain rather than improve, as quality already considered good. There wasn't much concern about taste and smell occasionally as felt to be a trade-off for clean and healthy water. • **Invest in new ways to supply water.** There is some concern over population growth, but this is a lower priority than improving demand. Some stakeholders supported Havant Thicket as a great opportunity to supply water to others beyond our own customers.

Consumer Panel Barometer Wave 1 report

This research was undertaken in March 2022.

Research objectives:

- Awareness of what we do.
- Satisfaction with us.
- Consumer priorities of what we should focus on in the future.
- Understand how aware customers are of the water resource situation in our region.
- Gain views on future water resourcing options.

Research Method:

- 700 consumer panellists.
- All were our billpayers.

Key insight obtained:

Insight we gained

Participants were well aware of our core role, but our non-core functions like billing and community activities could be communicated more widely.

Strong satisfaction (supported by our strong C-MeX scores); water quality seems to be the issue for the least satisfied customers.

4 out of 10 customers didn't know if there was any pressure on water resources in the area.

Most participants claim to make efforts to save water with the biggest motivation being to avoid waste and preserve resources.

The two biggest stated priorities for consumers were:

- Ensuring reliable supply
- Fixing leaks

After being told about water resources in the area and when considering the longer term picture the majority wanted to avoid damage to local environments whilst ensuring a long-term supply.

Nearly everyone wanted to see further investment in reducing leaks, with strong support for demand management and Havant Thicket Reservoir. Universal metering was broadly supported over and above desalination, water recycling or transfer solutions.

In support of local schemes:

- 7 out of 10 customers supported universal smart metering.
- The remaining customers had concerns over bill affordability and concerns linked to energy smart metering.

Customer Advisory Panel Research: Business Plan Priorities

This research was undertaken in May 2022.

Research objectives:

To consider our vision statement ahead of wider consultation to provide feedback on whether it is ambitious enough and whether it meets consumer priorities.

Research Method:

- Household sample of 20 participants spread over four segments:
  - ABC1
  - C2DE
  - Future customers
  - Vulnerable customers (financial and health)

- Non-household sample of five participants, made up of:

Farmer (using water for animal welfare)

  - Diversified Farmer (arable, holiday lets and renting land)
  - Engineering business owner
  - Community interest company (working with vulnerable customers)
  - Pub landlord

Key insight obtained:

Insight we gained

Most household customers don't think about their water supply, interact with us, or know that much about us.

Non-household customers (farming participants particularly) had a stronger awareness of us and our activities especially around work with nitrates, maintaining wildlife and water resources.

When customers saw some of our comparative performance data:

- Those with higher awareness and already positive view felt it supported that view.
- Those with lower understanding or awareness said they felt reassured.
- Those initially more critical of us appeared to be more positive.

Customers felt reassured that we were already putting plans in place for the future, and they want us to communicate the challenges we face more widely.

The draft vision was reviewed:

- Customer reaction was positive.
- Customers felt the initial draft may be too vague.
- They wanted shorter term goals to be set.
- Was potentially too ambitious – as was perceived it may be hard to achieve.

Consumer Panel Barometer Wave 4 report

This research was undertaken in January 2023.

Research objectives:

- To consider overall water bill affordability.
- Understand customers support for the different elements of our Water Resources Management Plan. These elements were:
- Leak reduction.
- Helping customers save water.
- Installing and using smart water meters.
- Securing more water sources.
- Understanding support from customers for the WRMP as a whole.

- Understanding customer support for how we have balanced different elements within the WRMP (leak reduction vs water efficiency).

Research Method:

- 434 household customers
- Quantitative surveys
- Weighted to age and gender to represent our region

Key insight obtained:

Insight we gained	89% of participants supported the WRMP and 88% of customers liked the balance of it. Customers finding it difficult to afford to pay their water and sewerage bills were less likely to support the plan. There are a range of reasons for supporting our plan but a sense of something has to be done is an underpinning factor and that costs seem reasonable. Younger groups focus on more generic reasons (e.g. the plan seems sensible) compared to older customers who focus on practical elements like saving water and reducing consumption. The top reason for not supporting the plan is that they feel that we should pay for the plan. 95% support for leak reduction by 2050. Only 8% of customers don’t support the plan to help households and businesses to become more efficient. 16% of customers do not support metering for all. 75% support the use of smart metering, with 82% of customers agreeing that charging for usage is fairer. 95% of customers support the reduction in abstraction from rivers, streams and aquifers.

Ofwat and CCW Preferences Research

This research was undertaken in January 2023.

Research objectives:

Understand what matters most to water consumers.

Explore water consumers’ views of Ofwat’s draft common Performance Commitment areas and to identify any new areas.

Test descriptions and measurement of Performance Commitments.

Understand any difference in views between customer segments.

Research Method:

- 12 x 90-minute online focus groups.
- 16 x 60-minute online depth interviews.

Key insight obtained:

Insight we gained

Service impacts that have immediate impact are higher priority than those with future impacts.

People are highly engaged where health was seemingly at risk.

Anything with perceived provider failure i.e. leakage, was particularly 'irksome'.

Just because some of the priorities were lower for consumers didn't mean they aren't important to them still.

Public regard for the environment is high but it needs to be specific i.e. biodiversity was vague, but industrial discharge into rivers more meaningful for customers,

Location influenced views, but not regionally i.e. people relate to what they see around them,

Vulnerability and affordability support emerged unanimously.

Businesses had few different views from household consumers.

Specifically for our plan:

- **Leakage**. Lower to mid-level concerns - strong links to asking customers to save water. Importance was likely to increase slightly if fixing leaks encompassed consumer properties.
- **Affordability.** Important to all customers but large families and older customers particularly raised issue of fairness.
- **Resilience.** Not a well understood area with customers but was of medium importance. It appears that the ability to deal with short term problems does appear to be critical for consumers
- **Biodiversity.** Was medium importance but this should be linked to a view of understanding what this is and the vagueness of the term, other than by being 'greener'.
- **Lead pipes.** Not perceived as a top priority by consumers; impact on health was concerning but reduced because of no immediate impact. Highly emotive subject due to risk to pregnant users and children.
- **Hosepipe ban**. Considered to be of low importance due to rarity of the occurrence and considered unlikely by consumers.
- **Severe drought measures.** Considered unlikely and therefore a low priority for customers.
- **Carbon**. Considered low priority by consumers, but they felt it was an important responsibility for every large company.
- **Reducing demand**. Considered by customers to be of low importance but people couldn't imagine small gains as making a large difference.

Continued from previous table.

Insight we gained	The research established three key areas of:	
	Service Aspect Area	**Importance**
	Water supply interruptions	High
	Appearance, taste, and smell of tap water	High
	Do not drink notice	High
	Boil water notice	Medium
	Leakage	Medium
	Pollution incidents	Medium
	River water quality	Medium
	Biodiversity	Medium
	Carbon	Low
	Customer satisfaction	Low
	Hose pipe ban	Low
	Severe drought	Low
	Non-essential use ban	Low

Synthesis and Triangulation of all the evidence and insight on priorities

To feed into our business plan in August 2022 we produced our third Synthesis and Triangulation report which specifically looked at our ‘Big conversation (1): Needs, concerns, and priorities’. We utilised the skills of research partners to support the delivery of our synthesis and triangulation along the engagement journey.

This initial insight helped us focus our vision and Long-Term Delivery Strategy as well as ensuring we could focus our future investment on the areas supported by customers. Our embedded engagement continued however, and we have consistently drawn in customer views all the way to August 2023 to ensure that our plan truly represented the views of our customers and stakeholders.

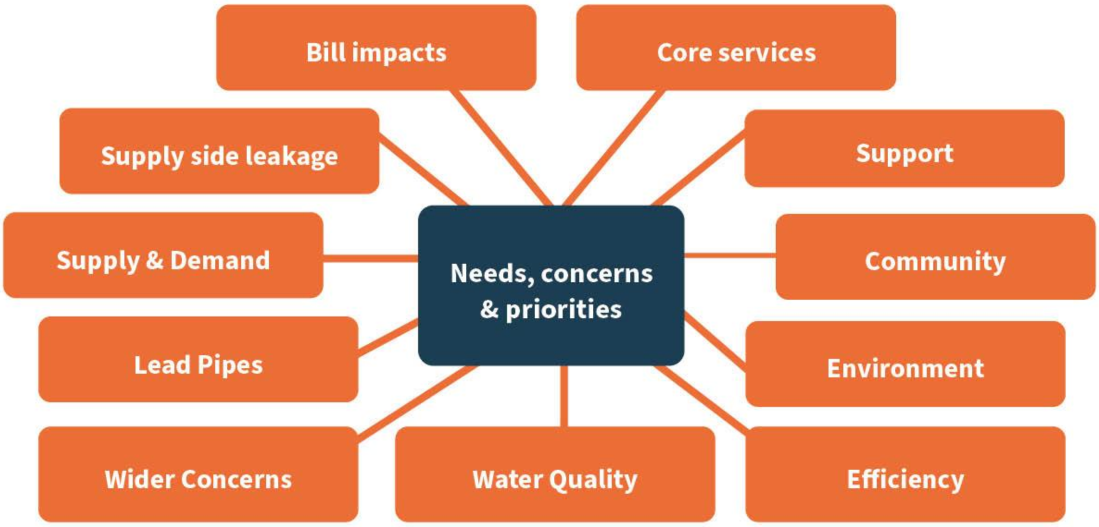
In March 2023 our focus was on utilising the insight gathered at that point to triangulate to our business plan. In reviewing our high quality evidence base in relation to these areas we identified 48 inputs into the insight review out of 65 key reports. This was segmented into:

Table 6: Reports at March 2023 relating to priorities

Quality Assessment of Report	No of reports
Primary high quality reports (score 8-10)	5
Secondary high quality reports (score 8-10)	12
Mid quality reports (score 5-7)	27
Lower or unrated quality reports (score 2-4)	4

A broad range of subject over multiple waves of research were gathered and included which are summarised below.

Figure 10: Themes included in insight gathering up to August 2022



The key insight that we gained from the synthesis were:

Environment

Generally

Household customers are aware of environmental issues but don't always connect water saving with being good for the planet.

Our non-household customers didn't link their business with water scarcity and climate change.

Our customers saw the environment as a bigger priority than they had done in PR19, and their preference was to go beyond the minimum and to pay a small amount more for improvements.

Long term plans should not be at the expense of the environment and future customers prioritised nature based solutions over engineering solutions.

Trust in the water sector is lacking due to sewage releases.

Portsmouth Water Customers

The environment was a medium level priority (and is backed up by Ofwat's Willingness to Pay research).

As customers become more informed about local resources and chalk streams, they do rate environmental preservation as more important.

Even our Future Customers who care about environmental impact say it should be done in a way that doesn't cost too much.

Secure and reliable service

Generally

High importance was placed on water company efficiency and ensuring minimal leakage.

Long term security of supply is a 'hygiene factor' for customers.

6 in 10 customers trust water companies to provide a reliable service.

Portsmouth Water Customers

Ofwat Willingness to Pay research showed that our customers wanted to avoid long term interruptions to their supply, and this was valued over anything else.

Water quality came in second to maintaining supplies.

Future customers particularly felt leaks needed urgent attention.

We have a 95% satisfaction rating from our customers (C-MeX) and in 2023-24 quarter 1 we are top of the C-MeX league table.

Lead pipes remain an emotive and priority issue for our customers.

Our future customers wanted better communications from us.

Customer service

Generally

Customers want more visibility from water companies.

A greater focus on education.

Increased Social Value (going beyond the basics).

Diverse cultures would like a greater emphasis on supporting customers.

Non-household customers have higher service expectations and would like better communications.

Non-households want companies to prioritise both price and customer service.

Portsmouth Water Customers

Customer service appears a higher priority for our customers.

There is strong satisfaction, and the 'local feel' is appreciated.

Service touchpoints need updating.

Vulnerability stakeholder satisfaction has declined.

Vulnerable customers value an easy customer journey and good communications to minimise stress.

Affordability

Generally

This theme is in flux. Pre-cost of living crisis, lowest cost was not the most important for most.

Cost of living is now top of mind.

Customers want a stable bill with support for the vulnerable.

Portsmouth Water Customers

27% of our customers think they will struggle either a lot or quite a lot over the next 12 months.

Lower income customers worried about struggling is as high as 49%, which matches those with vulnerable circumstances.

Vulnerable customers place a greater emphasis on bill support and making it easier to deal with us.

Stakeholders emphasise our responsibility for helping vulnerable customers.

Vulnerable customers are more concerned over issues with lead pipes than the typical customer.

Future customers are highly considerate of the needs of vulnerable customers, and they want us to be cost conscious and support cost sensitive customers.

This triangulation enabled us to better understand what our priorities should be. Alongside this we also focused on some following key topics that we knew needed to be considered as part of our plan with a particular emphasis on plan choices in Phase 2.

Taking our high level themes (as shown in figure 7) our engagement continued to gain relevant insight on priorities, always refreshing, updating and where necessary adapting to the new insight obtained.

To help us better understand what was important and supported by our customers our insight focus moved to the remainder of our six Big Conversations around which our research was based. These were:

- Long-Term water supply (options).
- Managing demand.
- How to invest.
- Interactions between customers and us.
- Affordability.

Framing our Big Conversations in this way provided us with a real focus. When combined with our 'dip test' approach to synthesis and triangulation this enabled us to continually monitor and identify gaps or sub questions that we were then able to grow and include within ongoing research in that conversation.

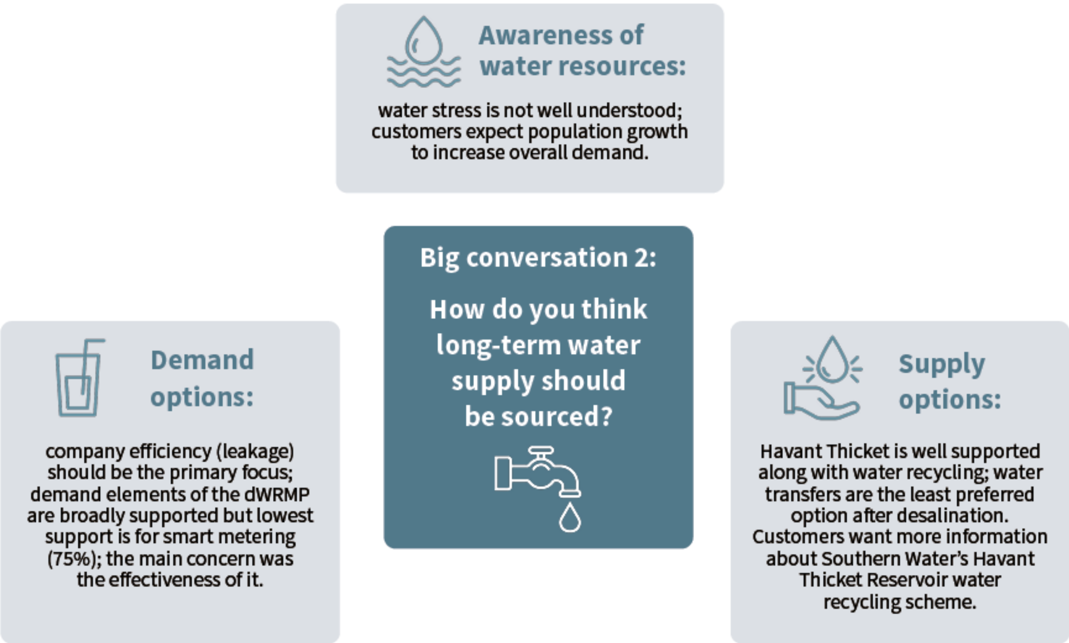
Weighing up the evidence

Whilst not all gained in Phase 1 (because of our ongoing approach) we have identified the key insight from our engagement strategy that relates to these big conversation themes.

Big conversation 2: Long term water supply (options)

This has been broken down into three areas of:

Figure 11: BIG conversation 2: Long term water supply (options)



Research elements that have informed this synthesis

We have provided a sample of research sources that have fed our insight:

- Research from Water Resources South East rWRMP.
- Research by Southern Water on water recycling.
- Our Stakeholder research on priorities.
- Insight from Southern Water's Expert Insight Panel (four workshops).
- Our supporting vulnerable customers report.
- Ofwat Cost of Living report.
- Our Vision consultation.
- DWI Public perception of water recycling for drinking water use report.
- Our smart meter and hyper care research.
- Our long term delivery strategy research.

What did the research tell us about water resources awareness?

Generally

There is low awareness of water resources, drought risk or company's strategic plans.

The issue of water stress is not well understood by customers; water is considered to be abundant.

Customer perception is that the quality of river and sea water has declined in recent years and customers are more concerned with ecology and wildlife than bathing.

Diverse cultures have a differing perspective and consider water on tap to be a luxury not to be taken for granted.

Companies need to talk about drought all the time not just in summer months.

Portsmouth Water Customers

We should expect population growth, and this coupled with climate change will lead to greater demand for water.

Our future customers have limited awareness of water restrictions with one third believing they experienced a hosepipe ban in 2022 (we did not impose a hosepipe ban in 2022).

Many of our future customers are making more of an effort to save energy compared to water.

What did the research tell us about Demand Options?

Generally

Customers believe that the primary focus should be on reducing leaks and helping customers to use less.

The proposals to abstract less water and use catchment management are not well understood but the principle of protecting the environment is supported (so long as it is effective).

Future customers are positive about reduced abstraction.

Companies need to get better at leaks through meters, and education and support.

Portsmouth Water Customers

Our customers do have different priorities compared to other company customers in the South East region – they are slightly less averse to abstraction.

Our long term leakage ambitions are not always considered to be ambitious enough (although customers recognise, they often don't fully understand the reasoning).

Household customers broadly support the demand elements of the WRMP. But, the Smart metering element received the lowest support at 75% with a strong corelation between support concerns.

What did the research tell us about Supply Options?

Generally

Supply options are considered secondary to demand and should be based on a preference for reliability of producing large amounts of water at lower cost.

There is broad support for reservoirs driven by leisure and environmental benefits but concern over localised disruption.

There is support water transfers as long as there are environmental benefits, but customers don't wish to depend upon them due to risks of droughts.

Water recycling gains mixed review with concerns over water quality. Over 7 in 10 are happy to drink recycled water.

Aquifer storage and recovery was welcomed as seen as innovative and good environmentally.

Desalination was the least preferred option with stakeholders particularly negative.

Tankering also has little support.

Portsmouth Water Customers

Highest support for Havant Thicket Reservoir as a preferred new source with a majority supporting water recycling.

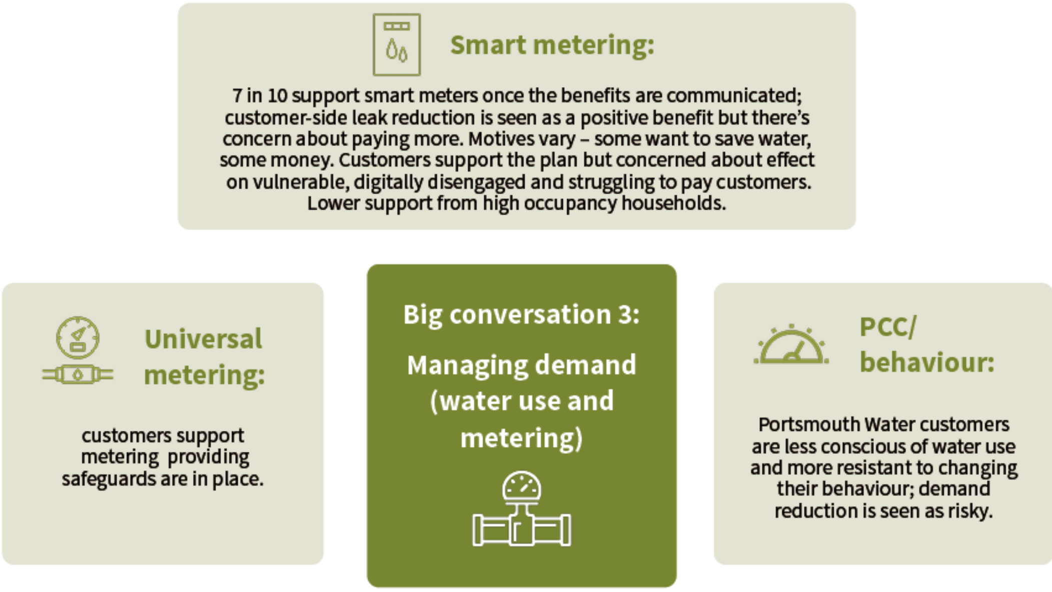
Future customers have concerns about whether biodiversity at Havant Thicket is being protected.

Our stakeholders are supportive of new sources provided environmental impact is managed.

BIG conversation 3: Managing demand (PCC and metering)

This covers three research areas:

Figure 12: BIG conversation 3: Managing demand (PCC and metering)



Research elements that have informed this synthesis

We have provided a sample of research sources that have fed our insight:

- Research from Water Resources South East rWRMP.
- Watervoice views of current customers on water resources.
- Public attitudes towards Smart water metering.
- Our foundational qualitative research.
- Our stakeholder research: Business Plan Priorities.
- Our Barometer wave 1 report.
- Relish: Reputation deep dive March 2022.
- CCW Water Awareness report 2022.
- Our Customer Advisory Panel – Report 1.
- Our Vulnerable Customer Research Summer 2022.
- Southern Water's Diverse Culture Research October 2022.
- Our Future Customer Panel Research 2022.

What did the research tell us about Universal Metering?

Generally

Metered customers are more likely to reduce water usage compared to unmetered.

Some resistance to metering was identified from larger households – they think bills will increase and wish to avoid thinking about usage.

Younger customers are more likely to trial a water meter.

Meters can be a cause of anxiety for vulnerable customers and particularly those who will make sacrifices to use less.

No awareness of how customers will be protected.

Portsmouth Water Customers

Metering is slightly less preferred in our region compared to other parts of the South East.

Customers became more supportive of meters when safeguards were provided for financially vulnerable.

Stakeholders were supportive of meters in regions where usage is above average but important to ensure that customer engagement is right.

In 2022 34% of household customers were metered with only incremental increases.

70% of unmetered customers in 2022 knew that they had an option for a free meter installation.

Universal smart metering was seen as too ambitious.

What did the research tell us about Smart Metering?

Generally

Broad support for smart meters with benefits being seen as financial savings, enabling informed choices, and helping to educate.

Stakeholders raise negative view of energy smart meters, increased bill anxiety, obsessive monitoring, and fear of disconnection.

Unmetered customers have concerns over paying increasing bills.

Roll our requires clear communications.

Portsmouth Water Customers

7 in 10 customer support smart meters once they understand the benefits of them. 14% of customers still reject the idea.

Our research is showing similar results to wider consumers with positive and negatives echoing concerns.

Better off customers seem to want to try and save water, whereas the less well-off want to save some money.

Older customers are more interested in trying to identify leaks.

Costs of smart metering led customers to prefer a mid-ambition plan with non-household customers being the most positive.

Future customers generally support smart meters as they make waste tangible, but the benefits need to be communicated and the vulnerable and digitally excluded shouldn't be left behind.

What did the research tell us about PCC / Behaviour?

Generally

Across the UK only 1 in 4 are aware of being asked by water company to use less water.

35% say they wish to hear more on how to save water.

If customers know that water resources are limited, then there is a higher willingness to reduce water usage.

6 in 10 have not taken any action to reduce water usage in the last six months, but 76% of customers claim to be open to changing their behaviour if they hear they need to because of climate change.

Customers taking up the slack of water reduction is seen as risky.

Portsmouth Water Customers

Our customers are:

- Less conscious than Southern Water customers on water use and struggle to think how to use less.
- More resistant to changing water behaviours compared to Southern Water and South East Water customers.

Our actual PCC average is 160 litres compared to average of 140 litres and household usage is up 8% from pre-Covid levels.

Future customers feel that the target for reducing consumption seems too ambitious as well as questioning use of 'Get Water Fit', as their experience of free water saving devices was poor.

BIG conversation 4: How to invest (including investment in sustainability)

This covers two research areas:

Figure 13: BIG conversation 4: How to invest (including sustainability investment)

Research elements that have informed this synthesis

We have provided a sample of research sources that have fed our insight:

- Water Resources South East – Long term water resources planning research.
- Water 2050 future customers insight 2021.
- Our Foundational qualitative research.
- Southern Water:
- Water Futures 2050 Panel (Wave 6 feedback on water resources planning).
- Water Futures business panel (Pilot wave feedback on water resources planning).
- Spontaneous Priorities (3522pre01) 2021.
- Our Stakeholder research: Business plan priorities.
- Our Consumer Panel Barometer Survey: Wave 1 and 2.
- Our Customer Advisory Panel: Report 1, 2 and 4.
- Our Vulnerable customer research Wave 1.
- Our Vulnerable customer depth interviews 2022.
- Our Future Customer panel: Plan Choices.
- Our Long Term Delivery Strategy research.

What did the research tell us about our investment?

Generally

Preparing fully for future challenges is a key consumer trend.

Long term investment should be best value and not just the cheapest or a short-term solution.

Majority want water companies to go beyond the basics of meeting minimum legal requirements – particularly around climate change and biodiversity.

When customers are informed, they are prepared to fund environmental solutions and most feel morally obliged to support future generations.

There is overall a willingness to pay now to safeguard water resources for future generations subject to affordability being considered.

Companies also need to be trusted to invest rather than profit.

Future customers believe in paying more to deliver environmental solutions subject to affordability.

Portsmouth Water Customers

Our customers would prioritise ensuring reliability and protecting the local environment over keeping bills low.

Customers demonstrate bill sensitivity; they want to pay for future investment gradually and avoid bill shocks.

Most do not want or anticipate large bill increases as they are currently satisfied with the service received and generally unaware of future challenges.

Our future customers feel that our targets for long term investment are too far away, and they feel some of it could be done now. They also question transparency on our progress towards long term targets.

Figure 14: BIG conversation 5: Interactions with Portsmouth Water and accessing bill information

Research elements that have informed this synthesis

We have provided a sample of research sources that have fed our insight:

- WaterVoice: Views of current customers on water resources.
- ICS Business Benchmarking for Portsmouth Water 2020.
- Our foundational qualitative research.
- Our Stakeholder research: Business Plan priorities.
- Relish – Reputational Deep Dive 2022.
- Our Supporting vulnerable customers research 2022.
- Ofwat Cost of Living Report.
- Our Customer Advisory Panel – Report 1.
- Our Consumer Panel Barometer Survey – Wave 3.
- CCW Trust and Perceptions: views on the water sector.
- Our Future Customer Panel 2022.
- Portsmouth City Council Residents Research November 2022.
- Our Minority Audience Research 2023.

What did the research tell us about our customer interactions and accessing bill information?

Generally

The best way to let customers know about something important is by email. However, younger (under 35-year-olds) are more likely to prefer digital channels than older age groups.

Awareness nationally of social media campaigns to save water is low with 1-in-10 recalling seeing water saving on social media tips last year.

Portsmouth Water Customers

39% of our customers prefer to contact us by phone, 19% by our webchat, 5% WhatsApp and only 2% by letter.

Future customers have low awareness of us and found our social media inactive and inconsistent.

Of customers that saw social media tips 60% claim to have taken action.

Awareness of information relating to river and sea pollution were:

- 43% television
- 22% newspaper
- 20% social media
- 13% radio
- 9% other online source

Ofwat research tells us that customers who are more frequently contacted and across multiple channels are more positive towards their water company.

Future customers find the ‘Get Water Fit’ platform lacking in good visual information and charts that are difficult to interpret.

Some customers believe our billing service us due for modernisation.

Customers expect quick, effective, efficient channel choice and expect our website to deal with many issues.

Stakeholders want a named person from our company although their satisfaction generally seems high.

Customers have mixed views of digitalisation – some are concerned it will exclude some customers. Non-Household consumers were positive, and services aligned to their priorities.

Figure 15: BIG conversation 6: Affordability including options for the economically vulnerable.

Research elements that have informed this synthesis

We have provided a sample of research sources that have fed our insight:

- CCW Water Matters: highlights report 2020.
- Southern Water:
  - Expert insight Panel Report.
  - Spontaneous Priorities Qualitative Report 2021.
- Ofwat Cost of Living Report.
- Our Vulnerable Customer research.
- WRMP24 customer insight summary.
- Our Social Tariff willingness to pay research 2022.
- Our Customer Advisory Panel 2022.

- Our Consumer Panel Barometer Survey – all waves.
- Our Plan Choices research: non-household customers.
- Portsmouth City Council Residents Research 2022.
- Our Affordability and acceptability testing.

What did the research tell us about affordability?

Generally

Pre-Cost of Living Crisis

Customers are open to modest bill increases.

Bill increases must consider the vulnerable and low income households.

Affordability needs to be considered when investing now for future generations.

18-29s are most likely to say that bills are unaffordable and that their financial position worsened between 2020 and 2022.

Customers from ethnic groups or with someone with a disability in the household are most likely to disagree that charges are affordable.

Customers who are struggling financially feel less resilient to new cost increases than they did during the pandemic.

During Cost-of-Living Crisis

The Covid-19 pandemic and cost of living crisis have increased the importance of supporting vulnerable customers.

Water feels more affordable due to high increases in energy costs.

For diverse cultures, affordability has become a much bigger issue and awareness of vulnerability and affordability support is low due to less engagement and literacy skills.

Portsmouth Water Customers

Pre-Cost of Living Crisis

There was a decrease in 2021 in the number of households thinking our bills are affordable.

There was low awareness of support schemes for those customers who are vulnerable.

Our customers are happy in principle to pay more to help others, provided the schemes support the right people.

There are mixed views from affordability customers about universal metering.

We have a low contact level with PSR customers.

Stakeholders want us to be more proactive at delivering schemes to our customers.

During Cost-of-Living Crisis

Affordability of the total water and sewerage bill is lower than in 2015.

14% of customers are aware of our affordability schemes.

Significant number of middle-income brackets are struggling to afford their bills.

70% of customers find an additional £3 on their bill for the Social Tariff to be acceptable.

In qualitative plan choices research our customers opted for medium rather than high Social Tariff options.

Future customers think it’s good to help but are concerned about what happens when customers cannot pay anything.

Vulnerable customers are most concerned about long term bill increases.

To ensure that we engaged with harder to reach customers we undertook specifically targeted research on the following customer segments:

Our harder to reach audiences

- We identified that we were struggling with engaging with minority audiences, so we focused on filling identified insight from these particular groups.

Key objectives:

Understand the specific needs and challenges faced by customers with alternative service and communication needs.

Understand response to key areas of the proposed plan including a high-level overview of the plan, specific service elements and the proposed bill impact by 2030.

Research was undertaken through:

Table 7: Harder to reach audiences, customer types

- 3 group discussions (in-person) ; 6 depth interviews ; 4 'friendship pair' interviews

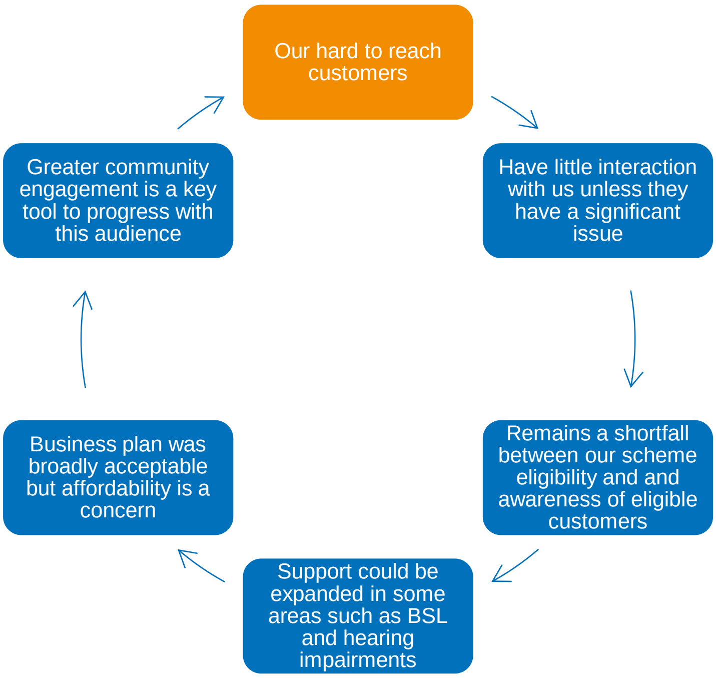
	Customers who are visually impaired	Customers who find it difficult to speak or hear	Customers unable to communicate in English	Households with a disability requiring high water use	Diverse religions & cultures
Stakeholder engagement	2-3 exploratory calls	2-3 exploratory calls	2-3 exploratory calls		2-3 exploratory calls
Stakeholder organised meeting (c.4 service users/members)	1 x 90-minute mini-group held at Portsmouth Library	1 x 90-minute mini-group held at Portsmouth Deaf Centre			1 x 90-minute mini-group held at Cosham Library (Muslim group)
PSR and WaterSure households (from PW supplied lists)	2 x 60-minute in-person depths (with carer/ friend/relative)		1 x 60-minute in-person friendship pair	2 x 60-minute in-person depths (with carer/ friend/relative)	
Non PSR / free find recruitment		1 x 60-minute in-person depths (with carer/ friend/relative)	1 x 60-minute in-person friendship pair		1 x 60-minute online friendship pairs (Hindu). 2 x 60-minute in-person depths (Hindu/Jewish)
Considerations	*Verbal stimulus*	*Require translator (BSL)*	*Require translator*		*GIS data to inform religious groups and location*
Total participants = c.26	**6 customers**	**6 customers**	**4 customers**	**2 customers**	**8 customers**

The learnings from this research have informed a number of our plans including:

- Development of our vulnerability and affordability plan including awareness and incident management.
- Our Social Tariff support plans.
- Our overall business plan.
- Investment.

At a high level this engagement gave us the following key insights:

Figure 16: Harder to reach customer insights



Vulnerable customer research

Key objectives:

- Better understand customers and their circumstances.
- Understand what vulnerable customers expect us to address in the next five to 25 years.
- Get their view on our priorities.
- Understand their reactions to bill support, metering (including smart metering and variable tariffs) and bill profiles.

To gain this insight we undertook:

- 18 in-depth interviews (online or by phone). Split between the following customer types:

Table 8: Harder to reach audiences, customer types

	Economic vulnerability	Ongoing health condition or disability	Recent circumstances
Criteria	Households in economic hardship	Households with one or more occupants living with conditions that could put them in harm	Individuals experiencing changed circumstances that puts them in potential harm
Sample	8 depth interviews	6 depth interviews	4 depth interviews
Recruitment	• The sample includes a subset of 3-4 digitally excluded (who will conduct the interview with a supporter on their technology) • The sample covers a breadth of age and socio demographics		

The insight from this research will particularly influence our service delivery around smart metering implementation and our work to develop our PSR.

The learnings from this research have informed our business plan including:

- Development of our vulnerability and affordability plan including awareness and incident management.
- Our Social Tariff support plans.
- Our overall business plan.
- Investment and bill profiles.

At a high level this engagement gave us the following key insights:

Research with our customers in vulnerable circumstances

- Customers dont generally see themselves as vulnerable and see many others as worse off than themselves. There is low awareness of support available; cost of living is top of mind as they feel it is for everyone.
- This customer segment's view of us does not really differ from other customers other than a demand for more thoughtful messaging and to make customer journeys easy with options for online services.
- Priorities were viewed positively and felt they addressed customer concerns but they did want more detail on how it would all be delivered.
- Customers were not aware of the range of bill support offered and thought this was good but wanted it more transparent. Many were open to paying more to support customers.
- Many agreed with the concept of metering but wanted larger households supported. Most were also open to variable tariffs and said they would adjust their routine to benefit.
- The preference is for bills to rise gradually.

C. Engaging on Phase 2: Plan Choices

In this section we summarise the clear link between our business plan choices and our business plan.

As described earlier, our research focused on the key activities which are in our business plan investment cases. A number of these group together in terms of insight findings and our plan is built on ensuring that we have customer support for both the choices we have made but also the associated costs.

There is a need to show a clear 'golden thread' between customer priorities, customer choices (outcomes considered with costs) which would then move forward into our Phase 3 Affordability and Acceptability stage.

Evidence Sources

We identified seven key sources of insight that are critical to our plan choices work and these are identified below:

Table 9: Critical research that has driven plan choices

Description	Report Date	Audiences covered	Method	Geographic Focus	How informed are participants?	Sample size	Robustness score (1=Low to 5=High)	PW coverage score (1=Low to 5=High)	Total evidence score (Max 10)
Barometer 4 – Plan Choices	Apr 23	General (HH)	Quant Research (online)	PW - all	Mix of previously informed and uninformed	690	4	5	**9**
Portsmouth Water Choices Consultation	Apr 23	General (HH); stakeholders	Quant engagement (online)	PW - all	Previously uninformed	402	3	5	**8**
In Community Plan Choices	Apr 23	Vulnerable	Quant research (F2F)	PW – partial (Chichester and Gosport)	Previously uninformed	180	4	4	8
Uni Barometer 1 – Plan Choices	Apr 23	Future Custs Portsmouth Uni students	Quant research (online)	PW – partial (Portsmouth University)	Previously uninformed	64	3	3	6
University Deliberative Research	Apr 23	Future Custs Portsmouth Uni students	Qual research (4 groups)	PW – partial (Portsmouth University)	Informed during exercise	29	4	3	7
NHH Plan Choices Qual	May 23	Business customers plus one NAV and one stakeholder	Qual research (Depths)	PW - all	Informed during exercise	17	3	5	8
CAP 2 – response to early plan choices	Dec 22	HH, Future, Vulnerable and NHH	Qual research (online groups and depths)	PW - all	Previously informed	21	4	5	9

The 'so what' of the insight

Our Plan Choices insight triangulation tells us about each of the key areas of enhancement or targets for us.

Leakage

Improving our leakage performance is from our perspective a critical component of helping to secure the 70 million litres of additional water that we will need every day by 2050.

It is linked with other key options within our plan including increasing our water supply sources and reducing customer side demand.

To increase our water supply sources we are upgrading the interconnectivity of our network (meaning that we can move water around even more than we can today) to the areas where demand may be greater in the future whilst also agreeing to reduce our supplies to Southern Water customers in the future.

This is a complex area and multiple solutions had to be considered together to ensure that we have the secure and reliable water supply that we know from our customer priorities insight is so important for our customers.

The options that we presented to our customers and stakeholders during this period of engagement showed a 'best value' selection, meaning that we did not choose on cost alone but with other considerations including overall benefits to our customers, the environment and wider society.

Our engagement and conversations have not focused on leakage alone and we have provided context for the engagement through discussions relating to other potential options around customer demand reduction initiatives, including metering of customers and more temporary restrictions on water use during drought periods.

Is it a priority for customers?

Finding: Overall, throughout our engagement in this AMP our customers and stakeholders have told us that finding and fixing leaks on our network should be a top priority.

In our earlier engagement (Phase 1 Priorities) with customers and stakeholders we undertook work to explore initial views of the right balance between expectations on us providing enough water through either new sources or reducing leakage, against the areas of customer participation through water efficiency and metering.

This early research told us that whilst both customers and stakeholders agreed that securing water supplies was important there were mixed views on how we should try and achieve this.

There was a clear difference initially between customer and stakeholder views:

Table 10: Customer and stakeholder differences

Customers	Stakeholders
Preference is to develop new sources of water.	Preference is to reduce customer side demand.
Both agreed reducing leakage was a high priority.	

Across the broader range of solutions in the early engagement stages customers prioritised solutions as follows.

Priorities	Reducing Leakage	New Sources	Water Efficiency	Metering for Everyone
Customer	High	High	Medium	Low
Stakeholder	High	Low	High	Medium

We provided more context to explore these differences and shared the costs and benefits of different schemes. This resulted in metering gaining higher customer support for everyone compared to some new water source options, such as desalination, water recycling and water transfers from other water companies.

Table 11: Research on plan choices as customers become informed

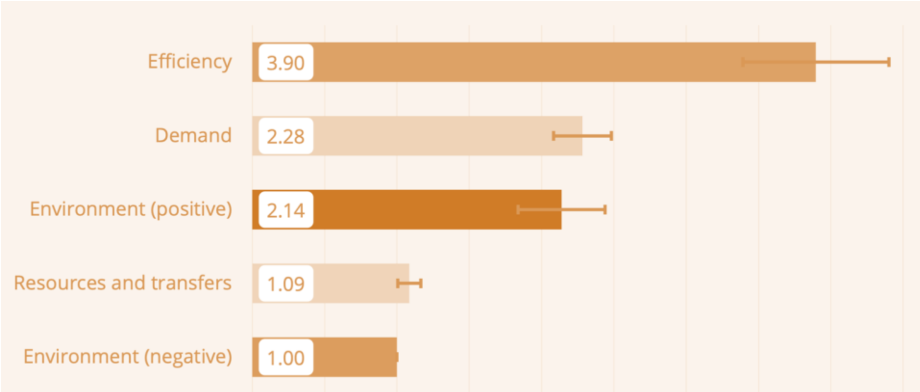
Option	Category	Strong customer support	Overall customer support
Reducing leaks	Reducing leakage	80%	96%
Everyone using a bit less water	Water efficiency	54%	89%
Construction of Havant Thicket reservoir	New sources	50%	84%
Use of grey water	Water efficiency	45%	80%
Metering for everyone	Metering for everyone	45%	73%
Desalination	New sources	36%	73%
Water recycling	New sources	32%	70%
Water transfers	New sources	27%	65%

Several pieces of early research supported the need for companies to reduce leakage as a key part of their plans. Some of the insight that has informed this approach includes:

Supporting insight: WRSE - Customer preferences to inform long term water resource planning

In a paired comparison choice test as part of a customer survey respondents indicated their preference for supply and demand options with the following results.

Figure 17: WRSE customer preferences



The efficiency choice in this survey was strongly linked to leakage delivery by companies.

We engaged with our customers over three main business plan options relating to leakage, a high, medium, and low option. The primary difference shown to customers in our plan research was the speed of achieving our target of 50% leakage reduction.

Figure 18: Plan options for leakage

The options presented were:

- Our evidence consistently points to the majority of customers endorsing the high investment option which is ahead of the general industry commitment to halve leakage by 2050.

Some of our qualitative insight suggested that some customers are keen for us showing greater urgency and ambition in this area than even the high options customers were presented with.

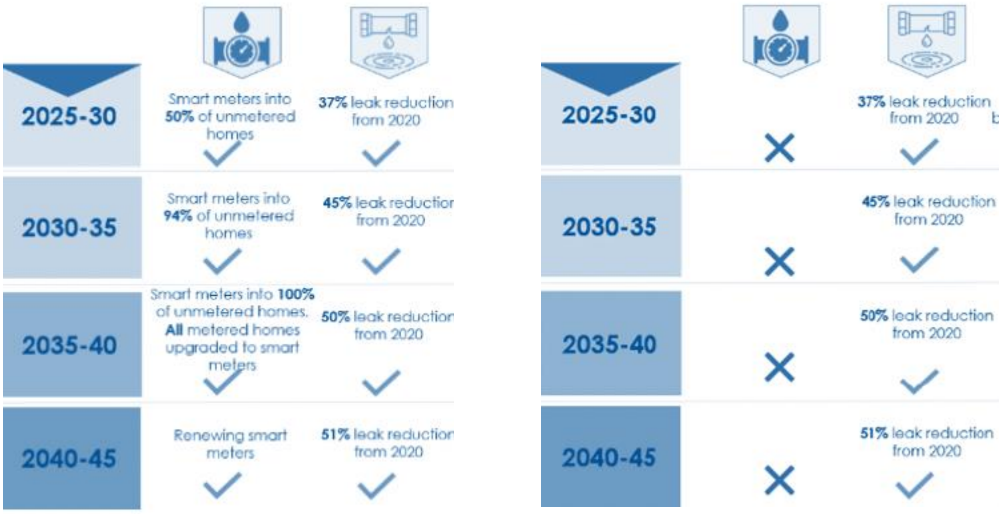
Supporting insight: Portsmouth Water LTDS Research with Customer Advisory Panel in July 2023

This research was undertaken to retest our Long Term Delivery Strategy impact through our Customer Advisory Panel. A total of 21 panellists took part, all of whom had previously taken part in four rounds of research and where therefore informed. This was extremely useful as we were discussing the high-level description of the LTDS which would have required a more deliberative approach with uninformed participants.

As part of our wider LTDS engagement the panel was asked to consider leakage both with Smart metering investment and without.

From a leakage perspective we see no difference in the choices made by customers at all.

Figure 19: Customer choices with and without smart meters



As part of the engagement programme we have seen a number of key elements that will influence our delivery plan, particularly relating to customer communications:

- Customer understanding of how Smart technology will support the delivery of leakage is not well understood.
- Many customers were concerned by the way leakage really is difficult to improve between 2040-45.

"It is really important to dramatically reduce the amount of water lost through leaks. It has already cost money to produce the quality drinking water so to lose it into the ground is a double waste of both a scarce resource and money spent producing potable water. This must be your priority, followed by both improving the environment and reducing the amount of lead piping in use."

"I believe reducing leakage should be highest priority, as this has a direct link to climate change - both through wasted energy use & through wasting clean water which is becoming increasingly precious as the planet warms."

What customers said

" I was a bus driver in and around Portsmouth, Gosport, Fareham, Warsash for over 15 years and witnessed water leaks that continued for years, I was and still am very disappointed that my money that paid my bills was never used to rectify these leaks. Hopefully they soon can be."

"Why does it take so long to fix the leaks that you know about? If water is becoming scarce, fix in the next 10 years and not 20."

Customer Support: It is clear from research that customers support:

- Delivery of the 2040 target of 50%.
- Our proposed glide path to 2040 with 37% reduction (from 2020) in leakage being delivered by 2030.

Reducing Customer Side Demand

Our ability to introduce metering for everyone is now enabled following our supply area being reclassified in 2021 by the Government as being an area of serious water stress.

We therefore can consider the need to install meters for all customers as part of achieving our vision under Priority 1: Securing sustainable water supplies for our customers, which protect and enhance our environment in a changing world. This is a priority and shows that our work with customers and stakeholders is well supported.

To enable us to better understand customer support for both universal metering and the use of smart technology.

Our priorities work with our customers initially looked at the range of options to secure sustainable supplies including metering for everyone.

Table 12: Customer priorities for metering

Priorities	Reducing Leakage	New Sources	Water Efficiency	Metering for Everyone
Customer	High	High	Medium	Low
Stakeholder	High	Low	High	Medium

To help customers better understand the differences between the options we provided more context in our research, explaining the different sources of water available within our area of supply coupled with the costs and benefits of the different types of schemes.

Following this work our 'metering for everyone' scheme achieved an overall customer support of **73%.**

It will "help me to better manage my water usage and drive behaviour change. Somethings a better conceptualised when seen in front of us on a monitor and water usage is one of those things."

A smart meter will help us with bath/shower comparisons, as it is "easier to educate our young daughter on water use if she can actually see the figures/numbers making it easier to comprehend."

It is important to recognise the context in which we are promoting metering for everyone.

Only 32% of our customers currently have a meter. These are:

- Customers in new properties (where the only option is a metered charge basis).
- Customers who have opted to have a free meter installed (and therefore most likely to be lower users of water).

- Customers who have changed household (our current policy is to install a meter at property ownership change).
- In 2016, CCW and Southern Water research found a strong reluctance to metering from unmetered customers. This research identified that the group they called ‘active avoiders’ thought they would be financially worse off and wanted evidence that similar households have saved money. Although some time has elapsed since this research was undertaken it is clear from our own research that this remains relevant.
- With the current lowest bill in England & Wales, combined with a view that we have significant amount of water as a country, it is clear that we will need to manage communications with these customer groups in a particular way.

More detailed exploration – a focus on Smart

After we had established that both customers and stakeholders where supportive of the concept of metering in principle, we continued to develop our research to explore this option in more detail whilst assessing the relative benefits of smart metering compared to analogue meters.

Our early research (discussed above) had identified that 73% of customers would engage with a smart meter if they were to have one installed.

During this detailed exploration we presented customers with three options for smart metering.

Figure 20: Smart metering plan choice options

These options did not only focus on cost and impact on bills, but also the consequences of the medium and low options increasing the risk to supplies in the period of the vision and LTDS.

Supporting insight: Customer Advisory Panel – November 2022

We saw that customers had mixed reactions to the concept of monitoring and reducing their water usage through smart meters.

Customers can generally identify positive implications, such as identification of leaks in the system, helping to reduce water wastage and also seeing the possibility of reducing the risk of droughts.

They do question how we will deliver our plan including:

- Whether high usage areas can be priorities for installation.
- How much buying and installing a meter cost.
- Whether technological support and education on water saving would be provided to maximise the benefits of the rollout.

- Whether there would be incentives to encourage people to reduce their usage.
- Customers also felt that £12.10 (high option) felt like a disproportionate bill increase. Others felt that 25% usage reduction felt too ambitious and unachievable, although some felt that 2040 just seemed too far off.
- We did see some difference in thinking between our customer segments in the research, but this was primarily relating to concerns.

Table 13: Differences in views on customer segments relating to

BC1 and vulnerable customers	Future customers and C2DE customers	Non-household customers
- Saw the mention of restrictions in the low option as a deliberate 'threat' leaving them with no real options other than medium or high. - Hostile to the idea of restrictions on water usage. - Concerned about the impact smart meters could have on their bills. - Feel that smart meters unfairly push responsibility for water saving away from the company and onto the consumer.	- Feel that a lack of water restrictions during periods of drought is counterproductive and would rather see some restrictions during very hot weather to preserve water resources. - Some think goal is unrealistic given population increases.	- Feel positively about the possibility of smart meters reducing business usage and decreasing bills (particularly where water is an integral part of their business). - One customer had experienced a leak on his farm and felt that a smart meter would have helped him locate it quicker and save money in the process.

The insight on smart metering highlights the importance of our plans going beyond the installation of the smart meter, ensuring that information that is available is easily understood by customers enabling and empowering them to save water.

- A number of aspects of our delivery plans have been informed by this robust research, including:
- Providing a range of communication channels, which research showed us can be driven through age with the website preferred by over 65s and a mobile application preferred by younger customers.
- Tailoring smart metering solutions to different customer demographics.
- Talking to customers about how lessons from energy smart metering have been learned.
- Helping customers understand when they aren't as efficient as they could be.
- Dealing with affordability challenges.
- Proposal is to install more than 200,000 smart meters between 2025 and 2035 (medium option) with all existing analogue meters being replaced by 2040.
- Aim to fit 94% of homes we supply with a smart meter.
- Customers will be supported with leak repairs, water use home audits, water saving devices and a range of innovative tariffs.
- All tariffs will have consumer protection inherent to support customers with affordability challenges or are protected through legislation.
- Our overall aim is to reduce water usage by nearly 20 litres per person per day.

We continued our engagement in this area to help us ensure that we had the best insight and learnings to develop the proposal, with customer and stakeholder insight shaping our delivery proposals.

- Our draft Water Resources Management Plan consultation – November 2022 to February 2023

As part of our WRMP consultation process we tested what our solution might look like by asking three specific questions related to metering.

Agree that water bills based on usage would be fairer than rateable value?	Support installing meters in most homes.	Support smart meters.
82% support	77% support	75% support

Three quarters of customers supported our proposal for smart meters set out in that consultation.

Was there any difference across demographics?

Support was consistently positive across different age segments, household size and those customers with circumstances that make them vulnerable.

When faced with the additional costs of metering 76% of customers overall, and 66% of vulnerable customers stated that they felt the increase in charges to maintain the water supply was affordable.

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

Customers and stakeholders both raised concerns on achievement of our usage targets in our 25-year plan.

(a) Customer Scrutiny Panel

Views from our Customer Scrutiny Panel mirrored many of the views already expressed through our WRMP consultation process around achievability of usage reductions and the impact low water bills will have behaviourally with customers.

(b) Future Customer Workshops

Innovation

To test our Future Customers' views we used an innovative approach to engagement through workshops that developed student presentational and project skills. This was combined with gathering insight on what these future generations expected from their water company.

These future customers were supportive of Smart meters, seeing it as an easy way to reduce leakage by making wastage more tangible.

They were critical of our ability to achieve the usage reduction targets using our current water efficiency methods and devices and felt we needed greater incentivisation, improved engagement both during and after meter installation.

- This informed our delivery plans further to include:
- Linking water usage savings with energy and wastewater cost savings.
- We have created the capability to link water and energy savings through our new Customer Applications and our innovative partnership with Kraken Technologies (part of the Octopus Energy Group).
- In partnership with Kraken we have created an innovation delivery vehicle, our "Water Lab" which is designed to help us develop and test key customer initiatives, including water efficiency.

Through our research we identified several concerns that needed to be further explored and addressed before finalising our delivery plans. These research points were focused on particular demographics that we had identified needed additional engagement to explore concerns in greater details and co-create affordable solutions.

We utilised bespoke research to feed into our engagement strategy.

Avoiding any disadvantaging of our customers in vulnerable circumstances

Previous research told us that vulnerable customers were supportive of smart metering understand the environmental benefits, but they had flagged the need to avoid both issues of affordability for some customers and particularly how meters can, if not managed properly, be a cause of anxiety for some customers.

- Research with vulnerable customers – August 2022
- 18 in-depth interviews via Zoom or telephone.

During the research vulnerable customers suggested the following adaptations to our plan:

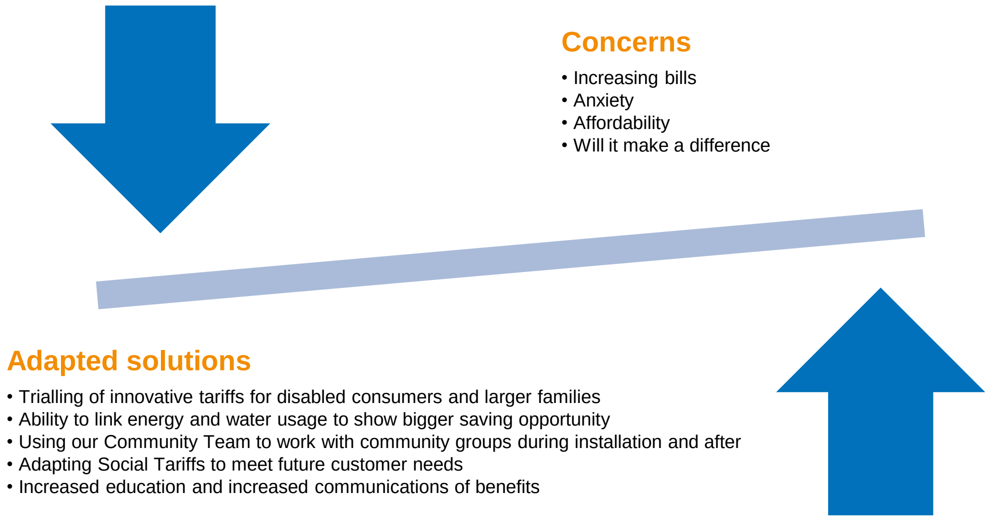
- A slower implementation.
- Longer transition periods between unmetered and metered charging to give time to build trust in the technology and adjust to the metered bills.
- Bespoke innovative tariffs targeted at helping vulnerable customers.
- Additional support for larger families and those who are more heavily reliant on water usage due to health issues.

(a) Harder to reach audiences – September 2023

This additional research told us:

- Concerns over the necessity for smart meters and whether it will lead to bill increases.
- Participants from the Muslim community were particularly concerned with bill increases.
- Use of smart meters to help cut down wastage was seen as worthwhile and corresponds with Muslim belief that water is precious.

Figure 21: Balancing customer concerns with supportive solutions



How we will work with customers and community based on this insight

Removing Lead Pipes

A key element of our 25-year vision is the removal of all lead pipes from our system whether company or customer owned.

This vision extends beyond our minimum statutory obligations, building on our AMP7 strategy, and the insight from our engagement has shaped our proposals for this business plan.

We undertook a number of engagement activities to support our approach in this area and which helped us to adapt our plans in the LTDS.

Initially we saw that customers' perspective of this activity was a low priority one, which was evidenced in research including:

(a) Consumer Panel Barometer survey – Wave 1 – March 2022

This survey was undertaken with 700 participants of our Water Talk panellists, all of whom were bill payers.

Insight Objectives:

- Awareness of Portsmouth Water.
- Satisfaction levels.
- Priorities on what Portsmouth Water should focus on in the future.
- Awareness of water resource situation in the region.
- Views on future water resourcing options.

We asked customers to score out of 5 their view on how much of a priority Replacing Lead

Pipes was for them. This resulted in a score of 3.24 out of 5 making this equal second to last in a priority list of 15.

(b) Customer Advisory Panel – Report 1 – June 2022

Over a similar engagement phase, we tested the views of customers about this element of our vision and established:

- Many customers were surprised that lead pipes had not been eradicated a long time ago.
- They wanted more details on efforts being taken to remove these pipes from the system.
- Only a minority had any awareness of our ambition already to fulfil this vision.

In this research we saw that certain elements of the conversation drew an emotive response from customers (this and water poverty particularly) once they better understood the challenge and was subsequently given a high priority in this research by our customers.

Plan Choices Research

Having seen our customers initial priority for this activity, coupled with understanding more about how customers react to this subject we continued to explore our plan choices (alongside other plan elements) using our consistent approach of presenting to customers our low to high options, including costs and outcome impacts. We presented customers with three options of:

Figure 22: Plan choice options for lead replacement

Low option

Increase lead replacement programme to ensure that all schools and homes have access to water with no exposure to lead by **2070**.

Additional cost **over 45** years = **£256m**.

Average increase on bill per year from 2025 to 2030 = **c.£0.70**.

Medium option

Increase lead replacement programme to ensure that all schools and homes have access to water with no exposure to lead by **2050**.

Additional cost **over 25** years = **£256m**.

Average increase on bill per year from 2025 to 2030 = **c.£1.30**.

High option

Increase lead replacement programme to ensure that all schools and homes have access to water with no exposure to lead by **2040**.

Additional cost **over 15** years = **£256m**.

Average increase on bill per year from 2025 to 2030 = **c.£2.10**.

Participants in this research opted for the 'High Option' meaning that all schools and homes have access to water with no exposure to lead by 2040.

Supporting views were:

- Customers felt that removing lead and reducing chemical use (used to negate impact of lead currently) would have a positive impact on health with a particular focus on young children.
- They recognised that not everyone can afford to have pipes replaced and some customers (e.g. tenants) might not be authorised to do so.
- They wished to prioritise schools for lead pipe replacement.
- Customers had some concerns, not with the ambition, but how we would be able to deliver this programme due to:
- How easy it is to understand the scale of the problem as understanding how many households are out there with lead is difficult to assess.
- Some remained concerned that this wasn't being given a higher priority due to the potential health impacts.
- Customers recognised that achieving the ambition of full elimination may be hard as not everyone will want the disruption to their property.

"It's relatively important issue but I don't know how big the problem is."

(NHH Customer)

"I'm not sure how realistic it is because I don't know how much work it actually is to replace these."

(HH Customer. Future)

How this insight has informed our plan

Having reviewed the insight from the engagement we recognise that this is an important issue for our customers and during research was the highest priority of any of the discretionary elements of our plan.

Our business plan investment case delivers replacement by 2030 of our highest risk vulnerable customers e.g. schools and nurseries, whilst also working on expanding learning through our smart meter roll out to create a database of properties for future business plans.

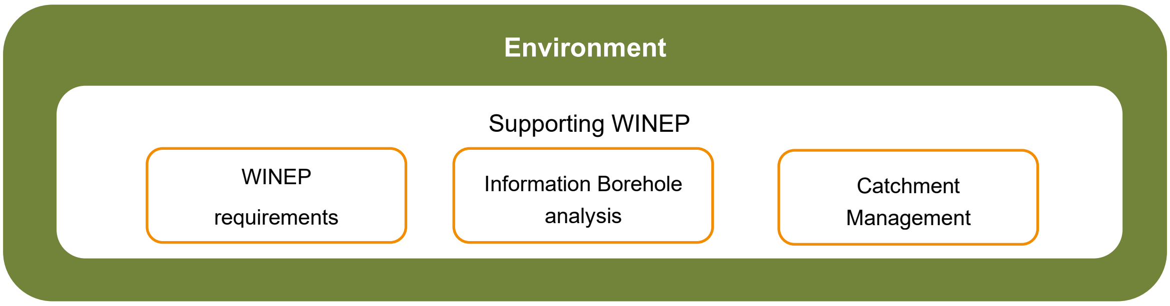
Through this option we address the majority of our customers' views with urgent replacement now whilst gathering critical data to inform future plans.

Improving the Environment

Whilst our engagement has covered significant elements of our environmental improvement work, our AMP8 investment case is focused principally on delivering our statutory WINEP requirements, with a smaller element of environment work which is required to be done adding to that investment case.

The three key areas of environment within our business plan are:

Figure 23: Key elements of our environment plan (WINEP)



Our research with customers has focused on:

- The overall support for making the environment a priority.
- Additional investment relating to catchment management.

(a) Consumer Advisory Panel – Report 4 – April 2023

This engagement focused on the following objectives:

- Exploring customer views on a series of ideas relating to social value and how it could be funded.
- Assessing which ideas had customer support.
- Understanding how each could impact on customer perceptions of Portsmouth Water.

As part of this research, we specifically explored environmental improvement by sharing with customers the outcomes of previous consultations that showed support not only for us to continue with our catchment management grants, but also extending them. This was up to £200,000 per year at a cost to the average annual bill of 8p per year.

We explored the options of spending the additional grants with:

- Further grants to farmers.
- Supporting other local initiatives through a bid process.

Insight obtained:

Providing additional support to improve the environment is seen as an intuitive and appropriate area for Portsmouth Water to focus on, due to its direct link to the environment as a business. Diversifying support to ensure it's inclusive of farmers and other relevant stakeholders is seen as the preferred next step.

Customers also told us that in relation to additional grants to farmers:

- The idea to give more grants to farmers is positively accepted.
- The cost is seen as low.
- Customers are likely to be supportive.
- It's key to ensure that we monitor for positive outcomes from the grant.
- Some customers did wonder if that would be sufficient funding to bring about change.

In regard to funding additional initiatives, customers told us:

- This was the best option for social value being delivered in the area.
- That lots of local organisations could benefit.
- That it was hard to visualise without a sense of the scale of projects.

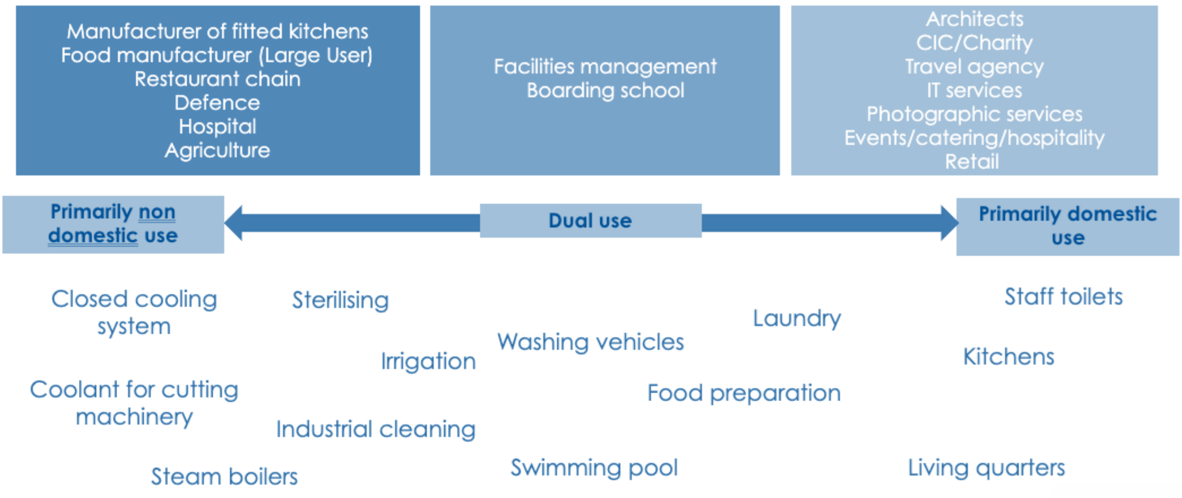
(b) Non-Household Plan Choices qualitative Research – April 2023

This research was 17 online interviews made up of:

- 12 SMEs
- 3 Business large users
- 1 developer
- 1 stakeholder

This research covered the following water usage types:

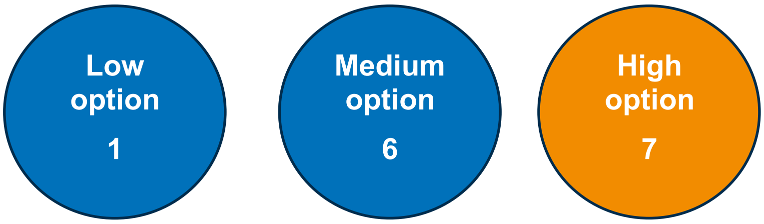
Figure 24: Non-household research customer types and usage



Customers were presented with three options in this stage of engagement.

Figure 25: Plan choice options for the environment

Customers preferred plan choice was:



We talked more as part of this research to help us better understand customer drivers, which identified:

- Many customers felt the options had a very minimal cost (even the highest).
- There was a clear climate change driver based on the customers' geographical location (with those closest to the coast having higher impact awareness).

"To be honest the figure is only 36p - whether for the environment or not they should just go to the higher level. It's hardly worth mentioning. No one will notice it on the bill. We are all in this together, we will soon moan when things aren't being done. For a minimal amount it is a no brainer"

(SME, primarily domestic use)

"Wildflower meadows sounds all well and good, but is that really what we need? We need to be prioritising spending due to how constrained budgets are for water companies"

(NAV, primarily non- domestic use)

Customers supported the high investment option across all research (this is potentially due to the low cost on bills of delivering).

Future customers are particularly likely to choose the high option as they exhibit a high level of concern for the environment.

Customers see this as an important activity to enhance and protect the environment to counter any negative impacts we have on it.

Small company premium

As a small company we incur higher financing costs than our larger peers, in particular we incur a higher cost of raising corporate debt. Where customers support it, Ofwat allows for these additional costs in setting price limits via a Small Company Premium.

To understand our customers' views in this area we have engaged with customers over the Small Company Premium and the additional costs of borrowing that we to incur.

We undertook three focused research pieces with our customers prior to any acceptability and affordability testing which were:

(a) **Consumer Barometer (quantitative) – Wave 6 – April 2023**

(b) **Student Barometer – Wave 2**

(c) **Customer Advisory Panel (qualitative) – Wave 5**

In each of the research methods we focused on the following objectives relating to Small Company Premium:

- Establishing the perceived advantages and disadvantages of being served by a small local company.
- Establish support level for small company premium.

The findings have been triangulated together and it provided us with the following insight:

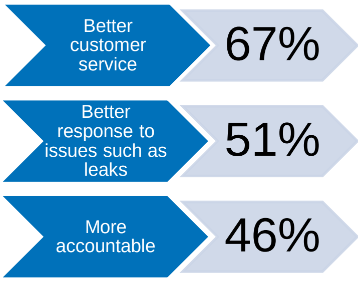
Consumer Advisory Panel participants have a positive view of us (although it should be recognised that these customers are informed). They recognise that we:

- Have one of lowest bills in the sector and have a local focus.
- Strive to go over and above Government requirements.
- Deliver social and environmental benefits.
- Some vulnerable customers are conflicted due to some of the plan activities i.e. bill increases and smart metering.
- They recognised that we manage with a much lower revenue "punching well above its weight"

The Consumer Barometer survey showed us:

- 63% of customers felt it was advantageous to be served by a smaller company.
- Our top three advantages mentioned include:

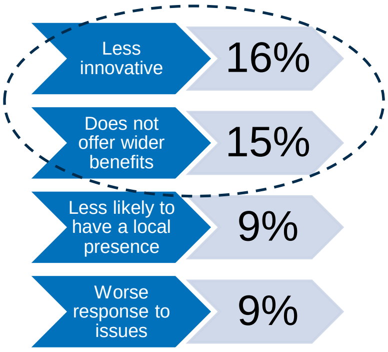
Figure 26: Results of service views when being served by smaller company



In the qualitative work, having a local presence is seen as having strong advantages.

In contrast in the barometer survey 26% of customers perceive disadvantages from being served by a smaller company. The three top reasons identified are:

Figure 27: Potential downside from customers when being served by smaller company

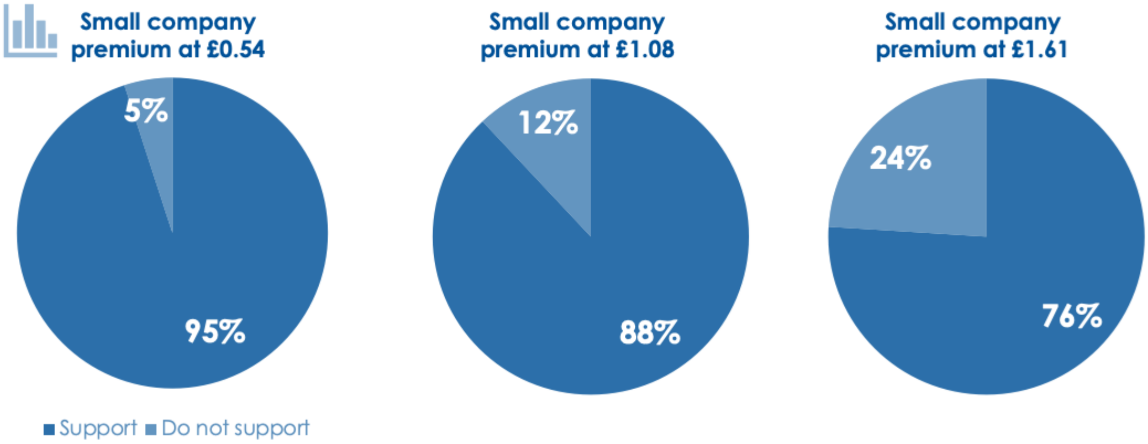


n.b. 3rd and 4th place were tied.

Overall support

Based on our quantitative Barometer survey of 557 customers we tested three Small Company Premium uplifts, which are in line with Ofwat's methodology. This showed the following levels of support:

Figure 28: Small company premium support



D. Acceptability and Affordability Testing

A key part of our engagement programme for our business plan is the testing of the acceptability of our plan, both in terms of the bill impacts and associated ambition.

In PR24 a standardised approach has been adopted that will ensure that there is transparency and comparability between different companies as a result of standard questions and approaches.

We worked alongside Ofwat, CCW and other water companies on the Steering Group that was responsible for developing the standard approach to the research.

We jointly undertook this research with Southern Water as the wastewater provider to our customers.

Adherence to the Ofwat guidance

We have outlined below the key areas which formed the guidance provided by Ofwat to the industry.

(a) Compliance with sample and method requirements:

- Ofwat guidance on the prescribed sample and method was fully complied with.
- Household customer records went through an initial matching process between data held by us and Southern Water, to enable the bill amount for households to be accurately appended, and to ensure that all customers invited received joint services.
- The methodology developed had an optional reminder stage, but this was not utilised due to the response rate being stronger than expected; we achieved the target of 500 responses in the first invite.

(b) Questionnaire compliance:

- Appendix F of the Ofwat methodology was followed for the questionnaire with just some minor changes (made in line with method) to align with the joint company research (mainly clarifying which company was being asked about in the questions relating to bill profile and plan acceptability).
- We added additional age band questions to be inclusive of household customers who did not wish to write in their age (agreed with Ofwat in advance).
- Optional questions were included at the end of the questionnaire to understand our bill profile and Southern Water's bill profile separately. This was after the combined bill affordability question at Q5 of the survey.
- Printed versions of the questionnaire required some additional signposting and minor wording edits for routing and navigation.

(c) Quality Control and Analysis:

- In accordance with Ofwat's guidance any "speeder' responses (customers who spent less than one third of the median time for that respondent group) were removed from the sample.
- We followed Ofwat's full guidance on weighting.

How we weighted the quantitative method

We applied data weighting fully in line with Ofwat guidance, initially applying five layers of weighting based on the principle of representativeness across:

- Age
- Gender
- Index of multiple deprivation
- Overall proportions of Household and non-household (based on 2022-23 actuals)
- Geographic representation

We also undertook 'rim-weighting' which was applied through specialist survey data processing software (Merlin) and a technical report is available.

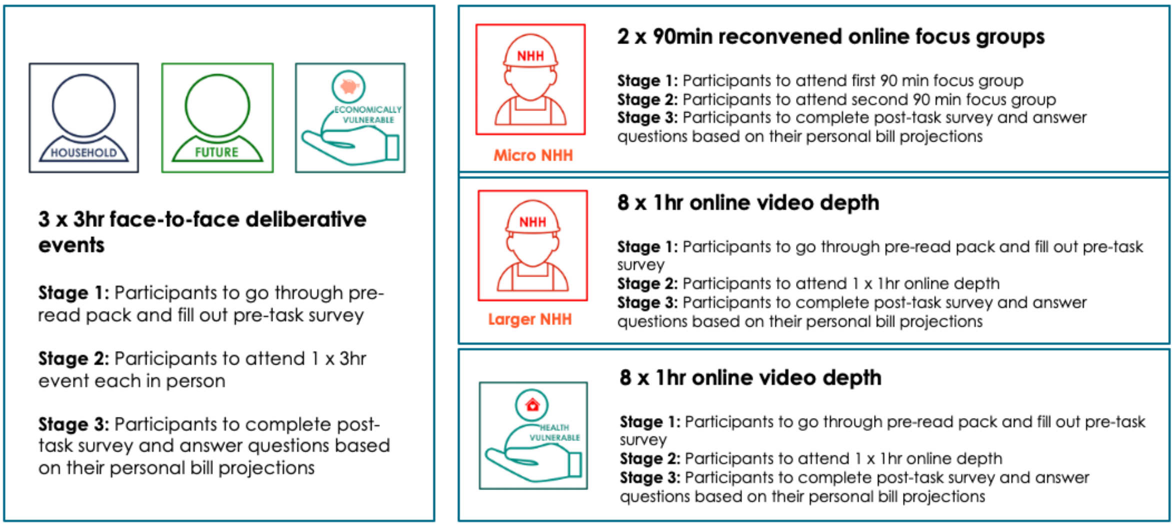
Key outputs of the weighting report are:

- Overall unweighted base size: 715
- Overall effective weighted sample size: 661
- Minimum weight: 0.58
- Maximum weight: 2.10

Delivering the Acceptability and Affordability survey

Qualitative phase:

Figure 29: Methodology of research informing Acceptability and Affordability testing



The context to the survey – A summary of the ingoing customer view

One third of our customers had struggled to pay at least one of their bills (not just water bills) over the previous 12 months.

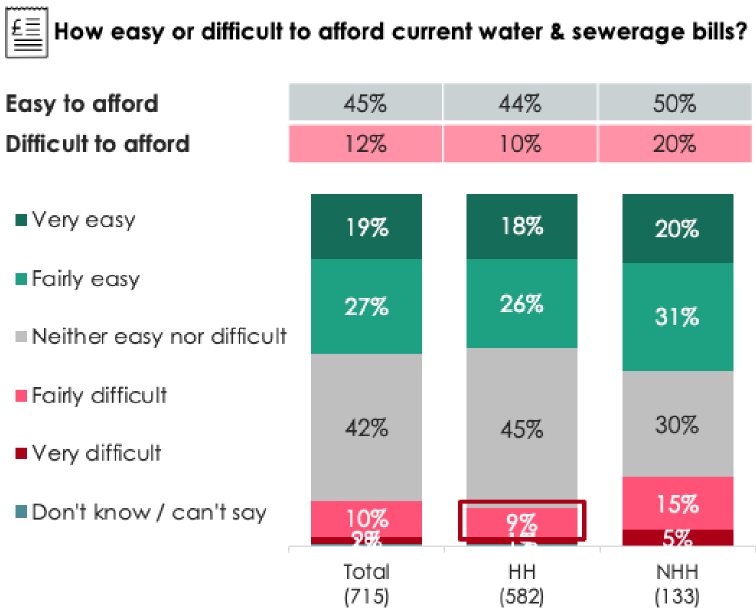
Table 14: Customers struggling to pay at least one bill over last 12 months

	HH & NHH	HH	NHH
Struggled to pay bills in the last year (all/most/some of the time)	33%	28%	47%
Finding it quite or very difficult to manage financially	12%	12%	12%
Expect financial situation to get worse	40%	46%	18%

In the qualitative research undertaken in May 2023 the majority of the sample (20 out of 34) said they fell between ‘getting by’ and ‘struggling’.

We also explored the customers’ views of their current water and sewerage bill affordability, and they told us:

Figure 30: Customer survey on how easy or difficult it is to pay current combined water and sewerage bill



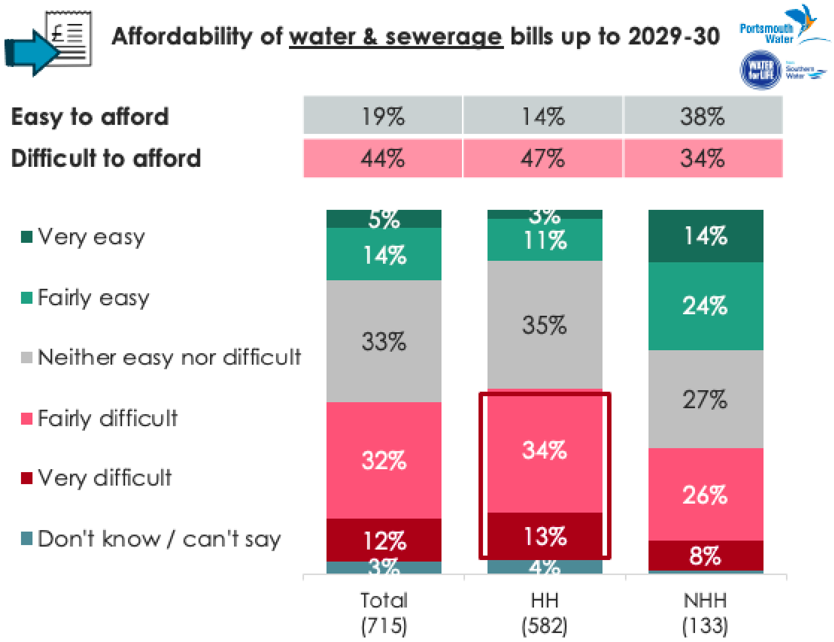
Our testing of Future bill affordability

(a) The combined water and sewerage bill

Over four in 10 say that they will find the proposed combined water and sewerage bills difficult to afford, which we see as a significant increase from the current view of today's bills.

Low-income households, lower social grades and household who do not feel comfortable or alright financially are more worried about being able to afford this future bill.

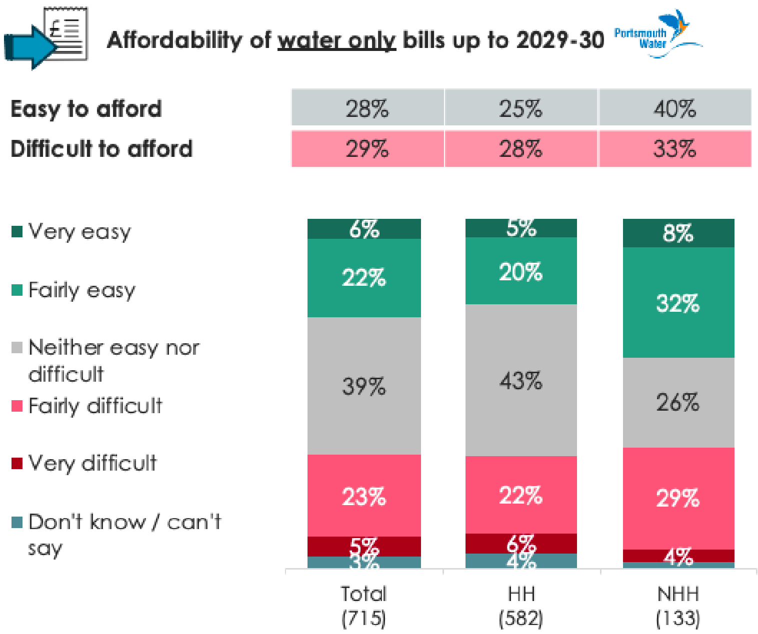
Figure 31: Affordability of water and sewerage bill up to 2030



Household customers are less likely to feel that water and sewerage bills up to 2030 are easy to afford.

The Water Services bill only

Figure 32: Affordability of water services on bill up to 2030



When customers were specifically asked about the water supply bill for Portsmouth Water up to 2030, only 28% think it would be difficult to afford and 25% feel it would be easy to afford.

The Acceptability of the Plan

In testing acceptability of plans customers were presented with the Portsmouth Water and Southern Water overall plan and then just our plan. As can be seen from the numbers below there is a significant difference in support when compared:

Figure 33: Acceptability of both water and sewerage services plans

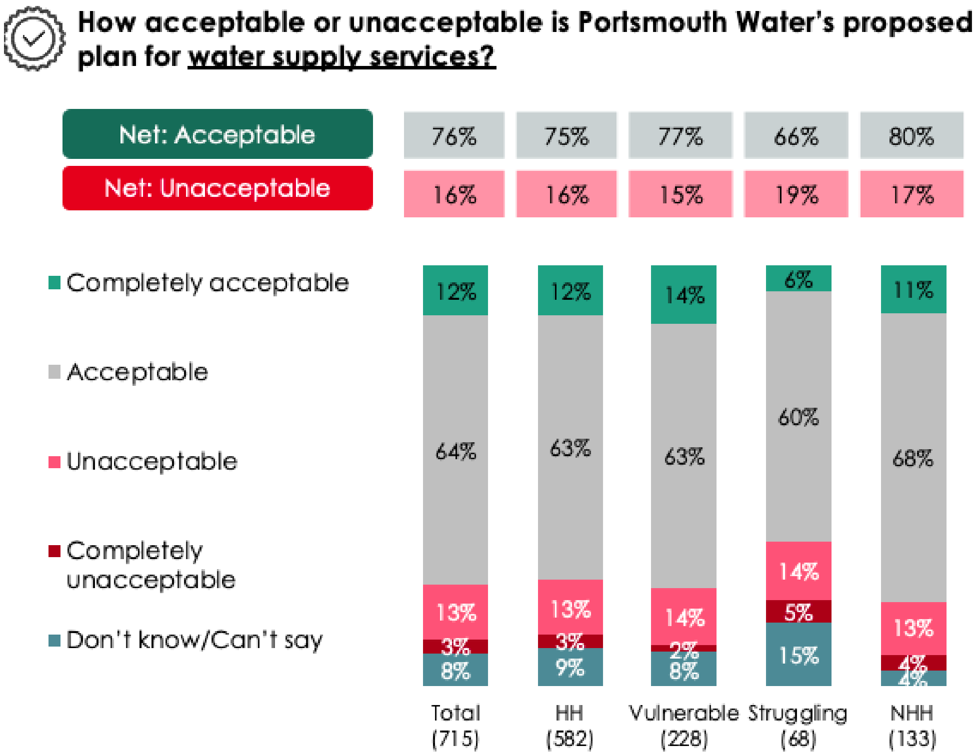
superscript : Based on: Default Paragraph Font	HH & NHH	HH	NHH
Overall plans – acceptable In response to seeing both Portsmouth Water and Southern Water plans	61%	57%	77%
Portsmouth Water's proposed plan for water supply services – acceptable	76%	75%	80%

Three quarters of household customers find our plan acceptable and 8-in-10 non-household customers.

In our household customer response, households who are struggling are the least accepting.

Our net acceptance for our proposed water supply service plan is:

Figure 34: Net acceptability of our water services plan



4. ASSURANCE AND MEETING CUSTOMER ENGAGEMENT STANDARDS

A. Assurance

Our engagement has been assured through a robust framework and our assurance process and assessments can be found at PRT15: Assurance

We have worked closely with Blue Marble to ensure that all research is robust and meets best practice standards and Sia Partners have provided independent assurance of our insight process.

B. Meeting Ofwat's High Quality Research Standards

As a key part of our Engagement Strategy we have ensured that our strategy, research, and approaches have all met the necessary standards outlined by Ofwat in the methodology 'PR24 and beyond: Customer Engagement Policy – a position paper" which was published in February 2022.

(a) Useful and contextualised

Our research has a number of key drivers:

The Engagement Strategy we have implemented drives a clear strategic approach to ensuring that our embedded engagement has practical relevance, driving insight that inputs into our service delivery plans, our continuous improvement or our business plans and strategies.

This coupled with our Big Conversations and themes ensures that we set the research objectives and how they map back in relevance to developing and enhancing our insight.

Whilst we ensure that our insight is relevant it is also recognised that there is a need to present findings back in context and also across a broader range of sources. Our **Triangulation Process** that was implemented alongside the strategy has ensured that we have considered this alongside the wider evidence base.

This process draws together a range of insights from customers, stakeholders, and relevant research from other companies, both internal and external to the sector. It has also drawn in our own business as usual analysis in areas such C-MeX, complaints, stakeholder conversations and Board engagement. As part of our ambition to develop a broader evidence base, we have taken key roles in working across the water sector in the engagement field through:

- Chairing the national water company engagement group (taking over from Anglian Water during 2023).
- Involving the South East regional research group and publishing all research papers and findings to all South East companies.

The triangulation process additionally considers for each part of the evidence base, the robustness and weighting to be applied to help apply appropriate decision making in the process.

To ensure that we got this right we engaged with our partners Blue Marble Research and Sia Partners to support the development of the framework.

(b) Neutrally designed and Ethical

We have partnered with Blue Marble Research who are highly experienced and operate under the MRS Code of Conduct which specifically focuses on ensuring that research is robust and unbiased.

(c) Fit for Purpose

Working with our research partners, the water sector generally and our wider stakeholders we developed our engagement strategy and Big Conversations to ensure that the insight that we develop meets the needs of the business.

Not only is it focused on our business plan input needs, but it has also enabled us to identify where we have any gaps in insight that are needed to inform our plan.

(d) Inclusive

As part of our strategy we have identified the need to engage several ways. Sometimes we need to ensure that we engage across a representative sample and then other times we need to reach out to harder to reach customers and minority audiences to help us better understand the specific needs of those communities.

We have managed our research programme to use a mix of methods to enable us to ensure inclusiveness. We have additionally been mindful of those harder to reach audiences where we have specifically targeted and undertaken deep dive interviews with customers.

(e) Continual

Our embedded engagement strategy drives the undertaking of continual and relevant research. We will additionally be looking to use our new customer applications to further enhance the work that we do in this area.

(f) Shared in full with others

We have shared all the research that we have undertaken through:

- Our SharePoint which all South East region companies can access and utilise the findings from.
- The wider national engagement group.
- All research (materials and findings) is published on our website.

(g) Independently assured

As part of our assurance process we have utilised:

- Sia Partners to assure framework compliance with our engagement processes.
- Jacobs as our external assurance framework partner who have considered the line of sight with our business plan decisions.

5. GOVERNANCE AND ASSURANCE

Production of this supporting document has been undertaken in accordance with internal governance and assurance procedures and processes. Third party assurance has also been provided by Jacobs Global Consultancy and SIA Partners.

This comprised initial drafting by an internal Lead Author, supported by external consultants, Blue Marble Research, as appropriate, under the direction of an Executive Owner who retains Executive responsibility for the document content including robustness and accuracy.

The document has undergone three stages of internal review and third party assurance before being signed off by the Board. Internally this has included:

i. Executive Owner,
ii. Nominated Executive,
iii. Internal Executive Review Team including the CEO and CFO.

Details of the third party assurance, including findings/opinion, can be found in PRT15.02.

SIA Partners assurance has focused on assuring our approach to engagement, gathering of insight and the triangulation framework that we have adopted, whilst Jacobs Global Consultancy focuses on our ongoing engagement and links into the business.

The Board has been engaged in the development of the business plan and its content through subject specific discussions at monthly PR24 Steering Committee meetings that have taken place since late 2021. Minutes of relevant meetings are included in PRT15 Board Assurance, Appendix PRT15.01.

PRT03 APPENDIX

PRT03 APPENDIX

List of Customer Research Used to Inform PR24

We have assessed 78 documents as part of our extensive engagement and insight strategy, which has informed our PR24 business plan.

Research completed by Portsmouth Water and highlighted in bold below can be found on our website, at the following link - portsmouthwater.co.uk/business-plan-2025-2030 and selecting *'Customer Insight Documents'* at the bottom of the page.

All research completed by an external source can be made available upon request.

Document Number	Document Title	Source	Associated Appendices
1.	PRT03.01 PR19 Customer Engagement and Triangulation	Portsmouth Water	None
2.	Customer Preferences to Inform Long-Term Water Resource Planning Synthesis of Findings – Summary Report Water Resources South East (WRSE) March 2021	WRSE	None
3.	Customer Preferences to Inform Long-Term Water Resource Planning Part A Evidence Review Water Resources South East (WRSE) February 2021	WRSE	None
4.	Customer Preferences to Inform Long-Term Water Resource Planning Part B Deliberative Research Water Resources South East (WRSE) February 2021	WRSE	None
5.	Customer Preferences to Inform Long-Term Water Resource Planning Part C Customer Survey Water Resources South East (WRSE) March 2021	WRSE	None

6.	Semiotics Brand Exploration	Yonder	None
7.	Clockface Analysis of Customer Data	Yonder	None
8.	Water Futures 2050 – Customer Insights – Sept 2021	Southern Water	None
9.	Water for Life – Qualitative Survey	Southern Water / Relish	9a. Introductory Email 9b. Options Survey
10.	Water Voice – Views of Current Customers on Water Resources	CCW	None
11.	Public Views on the Water Environment	CCW	None
12.	Household Customer Complaints about Water Companies	CCW	None
13.	Water Matters – Highlights Report 2020	CCW	None
14.	Business Benchmarking – July 2020	Institute of Customer Service	None
15.	Portsmouth Water Service Mark Assessment Report - 2021	Institute of Customer Service	None
16.	Who Do You Trust?	Institute of Customer Service	None
17.	Water Futures 2030 – Priorities Analysis – Nov 2021	Southern Water / Relish	None
18.	UK Omnibus Research 2021 Report	Water UK	None
19.	Water for Life - Water Recycling Engagement Strategy (not available for public consumption)	Southern Water	None

20.	Water Futures 2030 – Jan/Feb 2022 Summary	Southern Water / Relish	None
21.	Public Attitudes Towards Smart Metering	Waterwise / Arqiva	None
22.	PRT03.02 Deliberative Qualitative Research	Portsmouth Water	PRT03.03 22a. Foundational Customer Research
23.	Water Futures Panel – March 2022	Southern Water / Britain Thinks	None
24.	Water Futures Business Panel – March 2022	Southern Water / Britain Thinks	None
25.	PRT03.04 Stakeholder Business Plan Priorities	Portsmouth Water / Blue Marble	PRT03.05 25a. Stimulus PRT03.06 25b. Discussion Guide PRT03.07 25c. Research Reading Materials
26.	PRT03.08 Barometer Panel – Wave 1	Portsmouth Water / Blue Marble	PRT03.09 26a. Questionnaire
27.	Expert Insights Panel – March 2022	Southern Water / EQ	None
28.	Reputation Deep Dive	Southern Water / Relish	None
29.	Image and Reputation Research Report	Southern Water / Turquoise	None
30.	Youth Panel – Future Priorities – Dec 2021	Southern Water / Britain Thinks	None
31.	Early Priorities Insights	Southern Water / Accent	None
32.	PRT03.10 Customer Priorities	Portsmouth Water / Blue Marble	None
33.	PRT03.11 Supporting Vulnerable Customers	Portsmouth Water / Community Research	None
34.	Cost of Living – Water Companies Experiences	Ofwat	None

35.	Water Awareness	CCW	None
36.	Long Term Strategy – Customer Meeting	Southern Water	None
37.	Water Futures 2030 Panel – April 2022	Southern Water / Relish	None
38.	Affordability Concern and Diverse Culture Research	Southern Water	None
39.	PRT03.12 Barometer Panel – Wave 2	Portsmouth Water / Blue Marble	PRT03.13 39a. Questionnaire
40.	PRT03.14 Customer Advisory Panel – Wave 1	Portsmouth Water / Blue Marble	PRT03.15 40a. Stimulus PRT03.16 40b. HH Discussion Guide PRT03.17 40c. NHH Discussion Guide
41.	Southern Water - Vulnerable Customer Research	Southern Water	None
42.	Early Priorities Further Insights	Southern Water / Accent	None
43a.	C-MeX Analysis (not available)	Portsmouth Water	43b. C-MeX Summary Analysis
44a.	2021/22 CCW Report (not available)	Portsmouth Water	44b. 2021/22 Q4 CCW Report
45.	Water Matters Report 2021/22	CCW	None
46.	PRT03.18 Vulnerable Customer	Portsmouth Water / Blue Marble	PRT03.19 46b. Discussion Guide
47.	Priorities Sharing	South East Water Companies	None
48.	Diverse Cultures Summary	Southern Water	None
49.	Cross Cutting Customer Themes	Southern Water	None

50.	Vision Consultation Results (not available)	Portsmouth Water	None
51.	Southern Water Smart Meter Qualitative De-Brief	Southern Water / Relish	None
52.	WRMP Insight	Southern Water	None
53.	PR24 Customer Priorities Summary	Southern Water	None
54.	Southern Water Repositioning	Southern Water	None
55.	Southern Water NHH Panel	Southern Water	None
56.	Water Futures 2050 – June 2022	Southern Water	None
57.	PRT03.20 Barometer Panel – Wave 3	Portsmouth Water / Blue Marble	PRT03.21 57a. Questionnaire
58.	PRT03.22 Cross Subsidy Research	Portsmouth Water / Blue Marble	PRT03.23 58a. Questionnaire
59.	Trust and Perceptions – Views on the Water Industry	Ofwat	None
60.	PRT03.24 Future Customers Panel	Portsmouth Water / Blue Marble	PRT03.25 60a. Day 1 Presentation PRT03.26 60b. Day 2 Presentation PRT03.27 60c. Stimulus PRT03.28 60d. Discussion Guide Day 1 PRT03.29 60e. Discussion Guide Day 2
61.	PRT03.30 Customer Advisory Panel – Wave 2	Portsmouth Water / Blue Marble	PRT03.31 61a. Stimulus PRT03.32 61b. NHH Discussion Guide
62.	Public Perception of Water Recycling for Drinking Water Use	DWI	None

63.	PRT03.33 Barometer Panel – Wave 4	Portsmouth Water / Blue Marble	PRT03.34 63a. Questionnaire
64.	PRT03.35 Customer Advisory Panel – Wave 3	Portsmouth Water / Blue Marble	PRT03.36 64a. HH Stimulus PRT03.37 64b. NHH Stimulus
65.	Collaborative Research – Topline Results (PW)	Ofwat / Accent	None
66.	Cost of Living – Wave 3	Ofwat	None
67.	PRT03.38 Future Customers Panel – Plan Choices	Portsmouth Water / Blue Marble	PRT03.39 67a. Stimulus PRT03.40 67b. Discussion Guide
68.	PRT03.41 Customer Advisory Panel – Wave 4	Portsmouth Water / Blue Marble	PRT03.42 68a. Discussion Guide PRT03.43 68b. Stimulus
69.	PRT03.44 Plan Choices – NHH Customers	Portsmouth Water / Blue Marble	PRT03.45 69a. Stimulus PRT03.46 69b. NHH Discussion Guide PRT03.47 69c. Developers Discussion Guide
70.	PRT03.48 Plan Choices – Full Triangulation	Portsmouth Water / Blue Marble	PRT03.49 70a. Survey
71.	PRT03.50 Affordability and Acceptability Testing – Qualitative Report	Portsmouth Water / Blue Marble	PRT03.51 71a. Deliberative Moderator Guide PRT03.52 71b. Online NHH Discussion Guide PRT03.53 71c. Health and Vulnerable Discussion Guide PRT03.54 71d. HH Stimulus PRT03.55 71.e HH Pre Read inc. Recording PRT03.56 71f. NHH Depth Stimulus PRT03.57 71g. NHH Pre Read

			PRT03.58 71h. Vulnerable Pre Read PRT03.59 71i. Vulnerable Depth Stimulus
72.	Portsmouth City Council Residents	Portsmouth City Council	None
73.	PRT03.60 Smart Meter Hyper Care	Portsmouth Water / Blue Marble	PRT03.61 73a. Discussion Guide PRT03.62 73b. Stimulus
74.	PRT03.63 Hard to Reach Customers	Portsmouth Water / Blue Marble	PRT03.64 74a. Discussion Guide PRT03.65 74b. Stimulus
75.	PRT03.66 LTDS	Portsmouth Water / Blue Marble	None
76.	PRT03.67 Affordability and Acceptability Testing – Quantitative Report	Portsmouth Water / Blue Marble	PRT03.68 76a. Survey Questionnaire
77.	PRT03.69 Customer Advisory Panel – Wave 5 and Customer Barometer Panel – Wave 6	Portsmouth Water / Blue Marble	PRT03.70 77a. Discussion Guide PRT03.71 77b. Stimulus CAP PRT03.72 77c. Barometer Questionnaire PRT03.73 77d. Stimulus Barometer PRT03.74 77e. Student Barometer Questionnaire
78.	PRT03.75 Summary of Engagement Triangulation	Portsmouth Water / Blue Marble	PRT03.76 78a. Synthesis and Triangulation Report 1 PRT03.77 78b. Synthesis and Triangulation Report 2 PRT03.78 78c. Synthesis and Triangulation Report 3 PRT03.79 78d. Synthesis and Triangulation Report 4 PRT03.80 78e. Synthesis and Triangulation Report 5

PRT03.81 78f. Synthesis and Triangulation Report 6

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