

Water Resources Management Plan 2024 Statement of Response Annex 7.1: Customer Insights

August 2023

Version 1



Securing a resilient future
for water in the South East

A consultation on our draft
Water Resources Management Plan
14 November 2022 to 20 February 2023



from
**Southern
Water** 

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1. Background and objectives

The plans we have set out will help protect and improve the environment, so we have sustainable water supplies in the future. Every water company in England and Wales produces a WRMP and update it every five years. We must all plan at least 25 years ahead. Our draft WRMP covers the period from 2023–75. For the first time, a regional plan has informed our WRMP. Water Resources South East (WRSE) is producing the regional plan for the South East. The draft regional plan considers the future water needs of the whole region, including the environment and large water-using sectors. Both of our plans are best value, which means they consider the needs of water users and the environment and drives increased resilience to droughts and environmental improvements. WRSE consulted on its least cost emerging regional plan in January 2022 and received over 1,150 responses. Since March 2022, WRSE has been developing a draft best value regional plan which it is consulting on from November 2022. These plans have informed our draft WRMP. We'll continue to align our WRMP with the regional plan to help futureproof our region's water supplies. You can read more on this here: [southern-waters-draft-water-resources-management-plan-non-technical-summary.pdf \(southernwater.co.uk\)](https://www.southernwater.co.uk/southern-waters-draft-water-resources-management-plan-non-technical-summary.pdf).

We want our customers to be at the heart of what we do and the decisions we make. This is why we implemented a robust engagement plan with customers, future customers, vulnerable customers, and businesses from across our operational area to understand their views and challenges on our Water Resource Management plan. This allowed for us to engage with customers across our region who were able to provide both informed and un-informed views on the plans as part of the consultation process. **Views from the people who represent our communities are vital to informing our decision making for our futures.**

We supply drinking water to more than one million homes and businesses in the South East. We plan ahead to make sure there will always be enough water available, when and where we need it. To do this, we work out how much water we will need in the future and how much will be available to supply. If we need extra water, we identify ways to secure supplies. This includes schemes that can either provide more water or reduce demand. We also look at ways we can work with nature to improve the quality and health of the sources that we take water from and our objectives centred around making sure we heard customer views on all these options.

Our primary objective:

- Detailed exploration of our Water Resource Management Plan (WRMP) with customers from who have different views, experiences, and beliefs to understand customers response to the proposed plans for our region
- Build customer knowledge of water resource issues in the South East and understand any questions and reactions they have to our plans

Secondary objectives:

- Ensure the views of young people, businesses, vulnerable customers and harder to reach customers were represented as part of our research
- Understand whether there were different views on our Water Resources Management Plan from different audiences across our region – this summary outlines any views that differ between the audiences we engaged.

2. Methodology and approach

To understand views on our Water Resource Management Plan we used our existing approach to insight through our deliberative, ‘always on’, BAU customer panels (Water Futures) and a range of bespoke projects. The customer panels give us an informed view on everyday activities like testing comms material, incident management response as well as their views on our long-term strategy and wider plans like WRMP, as we look ahead to ensure water supplies for future generations.

Through our Water Futures programme we can gather the views of customers who are well-informed and have good knowledge of the industry and our practices, as well as the views of existing customers who were less informed but could provide a fresh perspective – this was achieved through our existing Water Futures programme mentioned above. In addition to our BAU insight, we commissioned a piece of research to focus on engaging uninformed customers and giving them the chance to review the WRMP material and answer the questions as they were presented in the consultation.

This well-rounded approach meant that we were able to reach a large number of customers from across our region, from different backgrounds, as well as customers at different life stages. The range of customers we spoke to really gives us a robust overall reflection of their views on the plan. The approach set out on the next page has given us the opportunity to speak directly and in detail with over 100 customers in addition to those who completed the consultation online through our normal channels. As well as feeding back their views on the plans, these customers now have a better understanding of the challenges we face in the South East.

As we enter 22/23 there is greater concern on the impact of ‘cost of living’, alongside protecting the environment, ensuring resilient services for the future, and protecting the most vulnerable in society. Our Water Futures programme is including panels from non-household customers, vulnerable audiences, stakeholders, and those from more diverse cultures where English might not be their first language. The additional groups will enable us to better listen to a more inclusive and range of views from the customers we serve. These groups then support our wider projects and joint work across the sector to continue to understand what matters to our customers and be able to act on that insight.

Figure 1: Customer Participation Principles



Figure 2: Methodology table

Project	Project Overview	Approach and sample	Output
Water Futures 2050	Online panel of future customers who come together every few months to tap in and review elements of our long-term strategy – focusing on that future view.	30-minute launch event with panellist, followed by a 1-week online community with 23 members of the youth panel understand views on the regional plan. A 2-week online community with 34 members of the Panel - building knowledge an understanding views on the WRMP and gathering responses to the consultation questions followed by 60-minute online sessions with highly engaged members of the Panel.	<i>Southern Water WRMP Future and Business Consultation Full Report</i>
Water Futures 2030	Online panel of household customers which runs alongside our PR-24 programme and allows for regular engagement.	Exploration of the WRMP consultation material by over 40 panellists as part of our online community reflecting our household customer views.	<i>Water Futures 2030 Jan/Feb Summary</i>
Water Future Business	We used an existing network of businesses across our region and that of Portsmouth Water to engage these customers on the proposed drought plan.	30-minute launch events with members of the Business Panel – gathering spontaneous thoughts and questions. A 2-week online community with 34 members of the Panel followed by a 60-minute online session with our non-household customer panel committee members.	<i>Southern Water WRMP Future and Business Consultation Full report</i>
Southern Water WRMP Consultation Quant	Recruitment of 102 customers to read through a replication of the consultation and complete the questionnaire as presented on our website.	102 customers from across the Southern Water region, a mix of gender, age, social grade, satisfaction levels and attitudes towards nationalisation.	<i>Turquoise Southern Water WRMP Consultation quant report</i>
Water Futures Vulnerable	Members of the vulnerable customer panel that were recruited by Turquoise were asked to review the consultation material either online or via hard copy before taking part in a Zoom tele depth where the consultation questions were discussed	Fourteen members of the vulnerable customer panel were able to engage with this piece of research. They were a mix of male and females, varying ages, and all with different reasons for being on the priority services register.	<i>Southern Water Vulnerable Customer Research WRMP full report final</i>
WRMP Relish Research	Regional spread of customers which Included some South East, Southern Water and Portsmouth Water customers as well as vulnerable customer and a number were recruited from areas relevant to the WRMP.	180 mins of participant time and completion of 11 task relating to the consultation questions. These customers are a spread from across the region to reflect the different diverse region we operate within.	<i>Full household WRMP Report Dec 2022</i>
Community Engagement WRMP	4 areas visited where WRMP solutions are proposed across ten days to understand customer reaction to the plans in their areas.	Over 1,200 customers engaged across the 4 areas we visited including Littlehampton, Shoreham, Aylesford and Henfield. Lots of awareness of water scarcity issues and feedback on the plans set out in WRMP.	<i>Zest WRMP Community Engagement 2022</i>

3. Overall summary findings

Primary Sources of Customer Insight:

- Full household WRMP Report Dec 2022
- Southern Water WRMP Future and Business Consultation
- Southern Water Vulnerable Customer Research WRMP
- Turquoise Southern Water WRMP Consultation quant report
- Zest WRMP Community Engagement 2022

Southern Waters WRMP customer engagement has far exceeded the statutory requirements, which included a consultation made accessible to customers through our website. However, we wanted to make sure that we went beyond this and made the plan as inclusive as possible to represent the breadth and depth of the customers across our region.

As part of our ongoing insight, we have robustly gone out and spoken to a range of customers and we specifically targeted certain audiences to make sure their voices were heard including vulnerable, future and business customers (both informed and uninformed). We also undertook a quantitative survey with over 100 customers which was a complete replication of the consultation but with customers who may not have had a chance to have their voice heard. We made sure we reached out to the local communities where these schemes are being proposed to hear more local feedback on the challenges and feedback they had. This robust approach has ensured we have feedback from an accurate representation of the diversity in our region and these views are summarised in the findings below:

- **Customers want Southern Waters WRMP to reflect the best value regional plan (93%)**
- They understand and agree we should align with our neighbouring water companies. However, there are some that want to see more of how best value decisions have been made –and that Southern Water have a considered rationale behind our decisions.
- **Customers expect and prioritise Southern Water investing in existing infrastructure before developing new supply solutions.**
- **Customers have high expectations of the WRMP, which the plan largely meets -** however, they want to see more ambition on leakage targets. Any reduction is supported, but any leakage will always be wasteful.
- **Trust in the sector and Southern Water reputation has damaged confidence – they want to see more immediate action.**
- **Customers believe the challenge has been made harder by perceptions of insufficient progress and investment since previous plans.**
- **Customers are reassured by the extent of the planning, in particular the adaptive elements -** they want to see and are supportive of the plans that are flexible and can be adapted if future scenarios change.
- **Reducing average daily per capita consumption (PCC) to 100L is felt to be challenging**
- customers are sceptical about whether enough mass behaviour change can be achieved.
- **The Government intervention is welcome - though timescales feel too long -** this is seen as especially an issue for minimum standards (2045) do devices and building regulations (2060).

- **They see a role for water recycling and welcome consideration of new reservoirs – both of which feel environmentally positive** - 100% of the ‘average person in the street’ supported the recycling schemes, and future customers particularly favour this as a sustainable future source. Desalination is more contentious, although it is supported. Transfers are not seen as route cause solution, more as an emergency measure. Supply-side solutions need to be assessed by how efficient, costly, and environmentally friendly they are.
- **Customers support the use of catchment and nature-based solutions** - however, they need greater explanation and to understand to be the principles and ambition behind it.
- **Education is considered key for supporting the WRMP - customers are particularly hopeful education will heavily reduce demand.**
- **Any plans need to be affordable – and customers want to see improvements that are not solely funded by increases in their bills**

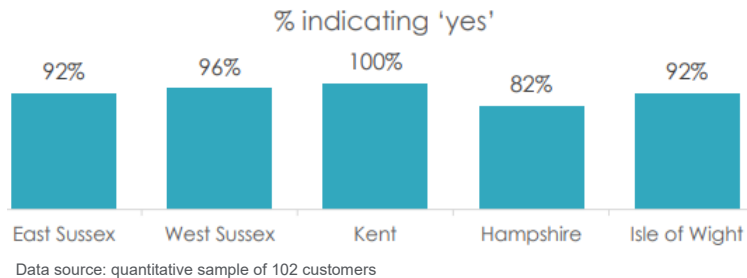
“After reading all this, I do feel reassured that Southern Water are doing all they can for the future. The measures they are putting into place are correct. Planning for population growth, climate change and environmental factors are essential”
Household Customer

4. Consultation questions – combined summary

Do you agree that our WRMP should reflect the best value regional plan, so we are aligned with our neighbouring water companies?

Customers across all the audiences we spoke to agreed that that the WRMP should reflect the best value regional plan so that it is aligned with neighbouring water companies. Customers in West Sussex and Kent were most in agreement with this (96% and 100%).

Figure 3: Turquoise Southern Water WRMP Consultation quant report



“Definitely this should be a nationwide approach, but the south of England has a growing population and therefore we need water supply and waste programmes to match this.”

For those who didn't support it there were concerns that the plans might not be in the best interest of the consumer or the environment – more of a reputational issue.

To protect the environment, we currently have a lower level of service in our Central area, covering West Sussex and Brighton and Hove, compared to our target. This means up to 2027 there is an increased likelihood of needing to impose restrictions on water use. We have set out our plan to address this gap. Do you have any comments or concerns about this level of service in our Central area and our plan to address it?

Informed customers from our panels feel lower level of service in the Central Area is well explained and most are accepting of it to maximise environmental protection. Unsurprisingly those in affected areas expressed concerns over the impact of lower service levels on themselves and/or their business.

However, a large number of uninformed customers who took part had comments or concerns (52%) about the level of service in the Central area and Southern Waters plans to address it. Customers in Sussex were the most likely to have comments or concerns (58%).

Key drivers for the uninformed customers – lack of investment and not fixing leaks is why there is a large proportion of concerns, greater education is needed around water usage/efficiency, more storage is needed, everyone should be getting the same level of service, **why hasn't this been addressed sooner?**

“It is surely critical that levels of service are comparable throughout your area otherwise those within the central area, are disadvantaged by where they live.”

We propose to stop using drought orders and permits that allow us to continue abstracting from the environment after 2040, unless we experience a severe drought. This means we'll need to develop new water supplies to replace them. Do you agree with this approach and the timescale we are proposing to deliver it?

Just over three quarters of uninformed customers said yes to agreeing to the approach and timescale of stopping the use of drought orders and permits and developing new water supplies to replace them (77%). Customers in East Sussex were most in support of this (92%).

Our more informed customer panels also agreed with this approach and were supported of the proposal to stop using drought orders – future customers are particularly supportive, but express concerns over the environmental impact of continuing to use drought orders if plans to stop are delayed beyond 2040. For businesses, they need reassurance that new water supplies will be reliable enough to ensure continued supply in future, and that stopping the use of drought orders will not risk supply shortages in the future.

For the 23% who didn't agree, they were more likely to think the timescales were not stretching enough as opposed to being acceptable → would like targets met sooner.

“The environmental impact needs to be fully considered, so I think moving cautiously forward is the correct approach.”

We have considered a range of future scenarios in our adaptive planning approach. Are there any other future scenarios that you think we should consider?

Customers are impressed with the level of planning here and they feel it shows real 'big picture' and forward thinking. There is reassurance that it deals with several key known unknowns and provides a number of alternative pathways. Future customers and businesses also responded positively to the scenario forecasts included in the WRMP, finding them clear and reassuring.

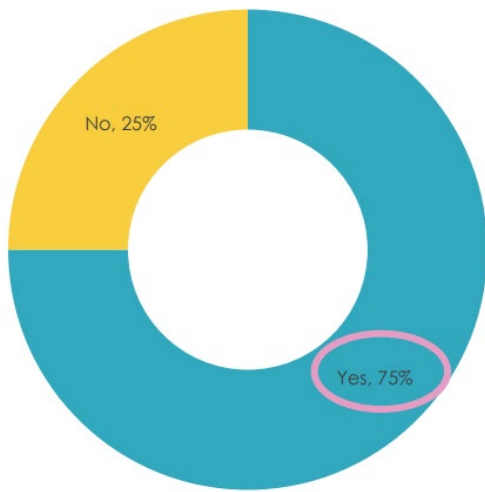
Other suggestions for inclusion are:

- Energy scarcity and economic uncertainty
- Business growth not just population growth
- Freak events/disasters (e.g., pandemic)
- Different levels of behaviour change achieved

“This seems to cover the main scenarios that will impact the future plan, but there is no mention of freak events/disaster events that could impact or derail this.”

Do you support our plan to at least halve leakage by 2050?

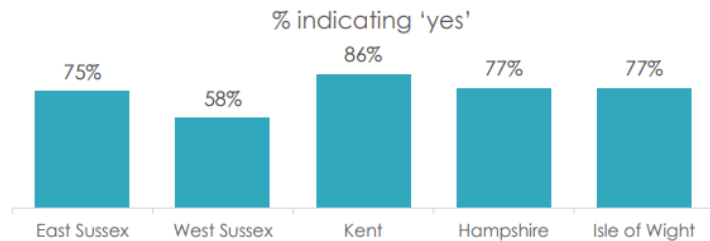
Figure 4 & 5: Turquoise Southern Water WRMP Consultation quant report



Data source: quantitative sample of 102 customers

75% indicated that they supported the plan to at least halve leakage by 2050. Customers in Kent were the most likely to support this (86%) whilst customers in West Sussex showed less likelihood (58%).

However, whilst customers support the idea of reducing leaks and feel it is long overdue, it is felt that the target of 50% must be higher given the timescales, or timescales should be drastically reduced for the 50% target – not felt to be ambitious enough and not happening at the right pace.



Do you support us achieving our WRMP target of reducing average personal daily use to 109 litres by 2040 or should we retain our more ambitious target of 100 litres per person per day by 2040?

Our more informed customers understand the context and why it is so important to reduce the water we use, as such are fully supportive of these targets, however, whilst more uninformed customers support the idea, they find it difficult to gauge how ambitious either of these targets are without context – it is felt behavior change will be very gradual.

For vulnerable customers there are some concerns amongst those who use more water for medical / health reasons about the amount of their usage and not being able to reduce it – we must be clear with our communications to reassure these customers. Most feel they are careful with the water they use already – would expect assistance / advice from Southern Water how to save further.

Worth noting that in our survey with uninformed customers, just under two thirds supported Southern Water retaining the more ambitious target of 100 litres per person per day by 2040 (65%) – many thinking we should be more ambitious. For those who support other targets (109 litres per person) they feel that a less ambitious target could be more achievable for households.



“I’m more conscious personally because of the cost of living. I’m very much more aware of everything we are using.”

“Businesses are much more likely to respond to ‘how much money can you save me’ than reducing my water usage.”

Vulnerable and Non-Household Customers

Do you support additional proposed government interventions and the timing of their introduction?

Customers approve of government intervention; however, timescales feel too long. Water efficiency feels like such an important but complex topic, mainly due to behavioural shifts needed. The Government playing role is felt to be essential to help add gravitas to the need for change.

Mandatory labelling on products that use water by 2024:

Feels logical, a quick and easy way to help customers make decisions over new products. With many products already showing efficiency labelling, implementation by 2024 is broadly accepted.

Minimum standards for devices that use water by 2045:

Customers are supportive, especially as price of purchase currently plays a significant role in decision making. However, the timescale of 2045 feels too far in the future, and perceived as simple to implement.

Amendments to building regulations for new homes and retrofits to deliver more water efficient housing by 2060:

To have a significant impact this feels like an absolute must, especially given the amount of new housing our customers are aware of. 38 years feels like a lifetime for something so important, the situation we are in with water resources is anticipated to be much worse by then.

For those who don't support – it's all in relation to the targets being set for 2060. Many supports the measures but cannot believe the nature of the timeline.

Our plan continues to rely upon temporary restrictions on water use to help lower demand during droughts to avoid further investment in new supplies. Do you agree with our approach to continue using temporary water restrictions during droughts?

Our more informed customers understand the need for TUBs; however, these should not be at the expense of further investment. Customers are supportive of these remaining in place but only when in the context of climate change and changing weather patterns. Support is increased when customers hear about how we would need to find an additional 20 million litres without these restrictions which is shocking to customers and as such, increases support.

We hear the same from uninformed customers with over three quarters agreeing with this approach (77%). They feel that temporary restrictions are acceptable but only if coupled with the right interventions and action from Southern Water like fixing leaks. For the 23% who do not agree it is felt access to water is a right and shouldn't be restricted to bill payers – reputationally customers do not trust us to act in their best interest.

Figure 6: Customer Participation Principles

Support is driven by...

- The specific actions proposed, which feel necessary and not overly restrictive
- The Government is felt to be in a good position to provide "top down" guidance
- Government backing shows seriousness of the issue, and would hopefully lead to people heeding advice
- Some suggest timings could be brought forward given the severity of the issues

"I do support this but very much in the short term, until all water companies can ensure adequate supplies without damaging environment and fix infrastructure. Until this happens, we will still need these orders."

A new strategic reservoir is an integral part of the regional best value plan for the South East. Do you have any comments on the size of the new reservoir?

For informed customers, a larger reservoir (with or without additional water recycling plants) feels logical and much more future proof, better able to cope with increases in population and demand, and climate change in the years ahead. However, a smaller reservoir with additional water recycling plants feels counterintuitive and many feel that it is better to focus on one initiative, and do it properly i.e., a larger reservoir.

Future customers and businesses also agree that a larger reservoir would be most beneficial on the assumption it will better handle any population increase in the area and reduce the likelihood of needing drought permits in future. Worth noting that in the larger scale survey 62% of customers did not have any comments about the size of the new reservoir but those that did felt it was important not be detrimental to the environment and local communities.

There is a desire that we provide information on the tradeoffs between reservoir vs. water recycling plant size, including which has a greater long-term benefit, potential environmental impact, and cost.

“Yes - If customers money is being used to create a new reservoir, we need to be reassured that it will be effectively used to create something that provides enough capacity to mitigate future shortages.”

Household Customer

Does your position change if the size of that reservoir (which will supply the transfer into Hampshire) impacts on the size of water recycling plant needed at Havant Thicket?

90% of customer who took part in our survey stated their position would not change - many comments thought both were important therefore optimising both would make sense and could be necessary for safeguarding future supplies.

“Yes - If customers money is being used to create a new reservoir, we need to be reassured that it will be effectively used to create something that provides enough capacity to mitigate future shortages.”

Household Customer

Do you support our strategy to develop new pipelines that will transfer water into our supply area, that is made available through the development of new strategic water sources in other water companies' supply areas?

There was widespread support for the strategy to develop new pipelines that will transfer water into the Southern Water supply area (93% of customers surveyed agreed). Whilst there is strong support for companies to collaborate and for transfers to be an option, more informed customers (household, future customers, and businesses) are more sceptical – raising concerns it's not future focused (seen to be robbing Peter to pay Paul). There are a number of factors at play when seeking reassurance on transfers:

To drive acceptability, Southern Water should:

1. Ensure a base level of resilience in their water supplies before relying on water transfers
2. Weigh up the benefits of water transfers from other water companies with the downsides (disruption during construction of long pipelines, loss of water through leaks)
3. Use the existing infrastructure of other water companies before building new
4. Use water transfers as more of an emergency back-up than a key solution for solving water scarcity issues.

“Being a highly populated corner of the country makes capture and storage more difficult. I would like to see if there are options to link more to the west and the less densely populated areas.”

Non-Household Customer

Do you agree that water recycling has a role to play in securing water supplies for the future?

In our quantitative survey of over 100 customers all agreed that water recycling has a role to play in securing water supplies for the future. This is the most supported part of the WRMP to these customers. For most this is simply a no brainer, it seems obvious, as it happens elsewhere in the world.

Whilst more informed customers also support water recycling, there is uncertainty around the impact this method will have on the environment long term and what actions are being taken to mitigate this – more information on safety standards would also be welcomed.

“I think it's a good idea to be honest, we're in a wasteful society aren't we. We need to get in that frame of mind really”.

“Most definitely. Water should be regarded as a valuable resource and must be recycled as long as it is treated appropriately. We live in a country where all our domestic water is treated to drinking quality. I am not sure if this is entirely necessary for toilet flushing etc. You could do a lot more about supplying kits or looking at technology for people to use grey water more efficiently.”

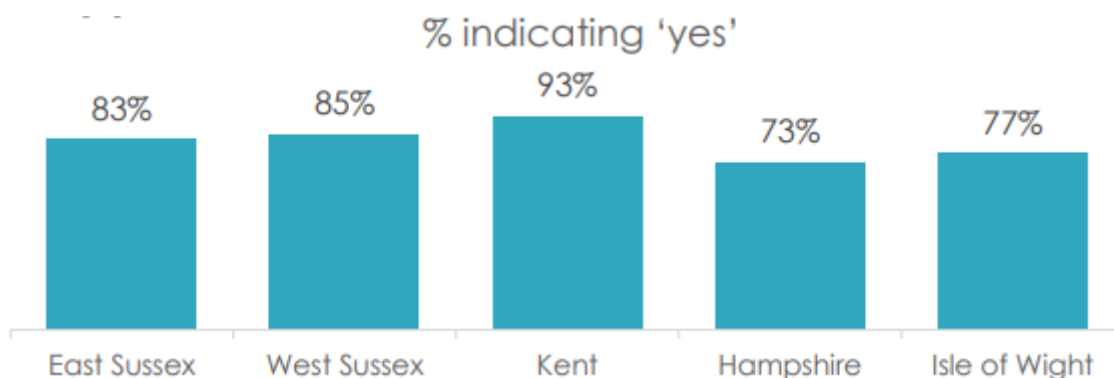
Vulnerable and Household Customers



Our plan has shown we could need a desalination plant in Sussex by 2040 and that more could be needed in the future if we experience high population growth, and we need to reduce how much water we take from sensitive sources. Do you think we should use desalination to provide additional water supplies?

Uninformed customers support the plan of a desalination plant in Sussex – overall in our survey 83% of customers agreed that Southern should use desalination to provide additional water supplies. They feel that this is used successfully elsewhere in the world and we have the coastline, so it makes sense. However, the environmental impact needs to be considered and this option shouldn't be to the detriment of marine life and ideally green energy would be used to power it.

Figure 7: Turquoise Southern Water WRMP Consultation quant report



Data source: quantitative sample of 102 customers

For informed customers whilst desalination makes sense, overall and specifically those living in the area feel more unsupportive and concerned over the impact. Although Future customers and businesses see this as a reliable, long-term method of substantially increasing water supply they have strong concerns about the environmental impact, including carbon emissions, and potential damage to habitats & wildlife caused by unsafe disposal of waste products. For those who don't think we should use desalination as an option, they are worried about the emissions/footprint of such an industrial solution.

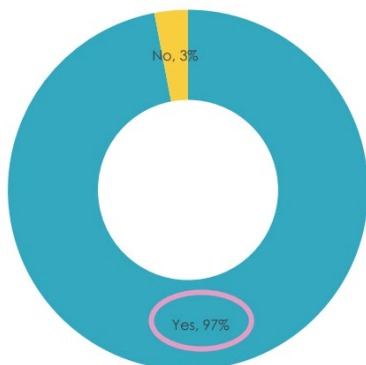
"I do think that desalination is important to providing additional water supplies. I think the process maybe needs some refinement if it's still not very cost effective."

Future Customer

Our plan has identified the need for a new reservoir to store water in West Sussex. Do you think we should investigate this further to establish whether it could provide a new source for the area?

Again, this was another highly supported area from both informed and uninformed customers. 97% were in support of Southern Water investigating further to establish whether a new reservoir to store water in West Sussex could provide a new source for the area. It's worth noting that, positively 100% of those living in West Sussex were in support of further investigations from our survey of over 100 customers. This is seen as a tried and tested solution and panellists are happy for reservoirs to be investigated, and some would like them to be prioritised.

Figure 8: Turquoise Southern Water WRMP Consultation quant report



Data source: quantitative sample of 102 customers

“I live about 20 minutes from Henfield, I occasionally drive through there and it is a nice area to live. I think it would be great if Southern Water could establish a new water source for the area so I think investigating this further would be a great idea whilst trying to protect the environment during construction as this is a very green area with lots of wildlife.”

Household Customer

Do you think we should look at water recycling options where water is stored in reservoirs, lakes, or other waterbodies as well as those where it is released back into nearby rivers and abstracted again?

This again is a strongly supported option for both informed and uninformed customers (94% think we should). Recycled water stored in reservoirs and lakes is felt to have clear benefits, however, if reintroduced into rivers then more informed customers have more concerns. The majority of drawbacks from more informed customers are focused on whether recycled water is released back into nearby rivers:

- **Contamination / environmental damage** – chemicals would be in our water system and harder to monitor or control, risking damage to water life and the environment
- **Disrupting the system** – altering the natural flow / water cycle / messing with nature, could this have greater ramifications down the line?
- **Not future proof** – whilst recycling is positive, using rivers is not ultimately felt to increase capacity in the system.

“I don’t have a problem with that. I’ve lived in areas where recycled water’s been used so you know provided it’s recycled to an acceptable quality; it’s not going to harm wildlife than in principle I don’t have a problem with it.”

Vulnerable Customer

Do you have any additional comments on any of the schemes we have proposed in our draft plan?

34% of the customers who took part in our survey had additional comments about the schemes we have proposed in our draft plan. Of the 34%, the majority of these comments came from customers in West Sussex and the comments were varied but included the need for more education on water usage/conservation and plans not being ambitious enough. There is also a consensus that timescales are too far off in the future - more needs to be happening now. Customers also see a need for more working with agriculture and industry and more use of nature-based solutions.

“The absence of any scheme involving existing industry and only limited mention of agriculture or limiting future industry to areas where it does not impose excessive burden on water availability is a mistake. I repeat that the emphasis is on the domestic user whilst industry including agriculture uses more than twice the amount of water as the domestic user. Surely bigger reductions in usage are likely from the industrial sector.”

Household Customer

Do you agree that we should develop our pipeline network so we can move more water between our supply areas and share supplies with our neighbouring water companies?

There is broad support for water transfers as it's seen to create a better-connected water network, to better enable water to be moved to where it is needed, though this is less of a priority compared to other supply options. For more informed customers, those who agree pipelines should be developed fall more along the lines of increasing collaboration between water providers so that this can be used as and when needed, but again, not as the primary option and more as a BAU moving forwards as a boost to other plans.

Those who are against feel the drawbacks are too significant, the main of which is this 'sticking plaster' mentality, not addressing the main problem and although they can appreciate this may be needed in the short term, it is felt that the time taken to implement this means that it would not be ready for its purpose. A timeframe would have to be provided as well as material stating the benefits that consumers would receive once the work was completed. In reality, many customers find it hard to make a decision based on the information given, wanting to know more about the costs to the customer and damage to the environment are key.

96% of customers who took part in our survey agreed with this question but with the caveats mentioned above and this is not seen as a main solution to the water supply issues.

“I am worried about the initial impact and level of industrialization of our natural areas. Focusing on sustainable practices is the key. I think this strategy may be short termism.”

Household Customer

Do you support our ambition to proactively use catchment and nature-based solutions where we can, to help improve the quality of the water sources we rely upon so we can abstract water sustainably and deliver wider environmental benefits?

Catchment and nature-based solutions are supported, even without understanding how it works, customers support the principles and ambition behind these solutions, assuming they are adopted in tandem with supply solutions.

For our panelists, this feels this approach aligns with the other commitments and priorities Southern Water outline in the rest of the WRMP which is made stronger by the support for improving existing water sources whilst monitoring damage current abstraction methods are having on the environment.

Support for these solutions is driven by the assumption that they are:

- Better for the environment
- Protecting wildlife
- Reversing damage caused to the environment during abstraction
- Going to improve water quality and reliability in the long-term

However, panellists expect this to be implemented alongside larger-scale supply solutions for securing more water, to ensure that water reliability is assured. Similarly, there was near unanimous support for Southern Water to proactively use catchment and nature-based solutions in our larger survey as 96% supported this ambition. Customers in East Sussex and Hampshire were most in support of this (100%).

“THIS IS ABSOLUTELY KEY. We are seeing the degradation of nature in the supply of water and the treatment of wastewater. In addition, the runoff of nitrates etc into rivers etc from farms (and no doubt the leaking of other substances from other businesses) must be severely reduced. We are currently battling nature when we must work in harmony with it. The time-line for this is increasingly short.”

Household Customer

Do you think that others who benefit from a healthy water environment should contribute to the cost of delivering these solutions?

Informed customers from our panels feel that they should not be paying more for what they believe is Southern Water's responsibility, and that industries that are part of the problem should be made to contribute. Panellists also want those with a duty to provide the UK with a healthy water environment, or polluters, to contribute to costs. More clarity is needed on who these 'other' beneficiaries might be - If it means businesses that use water, property developers, or sports organisations, then customers are not averse to them contributing, so long as Southern Water is contributing the lion's share.



Businesses are slightly more skeptical of these solutions, and feel that Southern Water need to ensure the environmental benefits created through such schemes are in line with the financial costs required to establish them.

Figure 9: Southern Water WRMP Future and Business Consultation Full Report



Two thirds of customers felt that those who benefit from a healthy water environment should contribute to the cost of delivering these solutions (68%). For those who disagreed the thinking was largely because it was Southern Water’s responsibility to deliver these solutions and it shouldn’t fall on to the customers to pay for this further – less agreement from vulnerable customers on this point.

“Vulnerable customers especially will not be able to bear the weight of higher water bills. Perhaps it could be done on a tier-system where higher income households might pay fractionally more to help fund this, but if SW is making profits, I think much of the responsibility should be on the company itself.”

Future Customer

Do you or your organisation have similar work planned in our catchments? Do you have any views on how best we can co-ordinate this work so we achieve the most benefits?

9% of those surveyed had views on how Southern Water can best co-ordinate this work to achieve the most benefits. Customers in Kent were the most likely to have something to say around this question (14%).

“Yes - I work for the charity Wonderseekers based in the south downs national park and we are in a mission to inspire young people to protect and heal our planet. Working with charitable and community organisation could help to improve the work you are doing and the impression the public has built of your brand over the last few years. The sdnip is already starting to coordinate a group at the West end of the park (which includes the source of the Itchen) so this may offer a good route in.”

Future Customer

Our draft WRMP includes options that will reduce demand and a mix of different schemes to produce extra water supplies. Do you think our plan strikes the right balance between demand and supply solutions?

Panels broadly agree with the balance struck in the WRMP, although many want to see a greater focus on leakage. It was thought that it was positive that so many different options and solutions are being considered. The panels feel Southern Water are effectively balancing the need to supply more water with the need to encourage a reduction in use among customers. However, all our audiences feel Southern Water could go further in reducing leaks, which they feel is highly important to address to prevent wasting water we already have.

In our survey of uninformed customers, 81% that the plan struck the right balance between demand and supply solutions. Main feedback was again that the plans were thought to be good with a range of options/solutions considered that tackled different issues. However, some thought it should be achieved quicker whilst others were worried about lots of factors being out of Southern Water's control and targets not being ambitious enough (such as leakage aims).

"Yes - I do. With leakage reductions, water recycling, turning sea water into drinking water, lowering water use and keeping a reliable supply - it strikes a good balance."

Household Customer

"No - there is too much emphasis on "new sources" and pipelines, rather than leaks and what is already here. Also, pretending that Southern Water does not do much damage to both the economy and environment of Sussex is a joke".

Household Customer

5. Key conclusions from quantitative survey

As mentioned in our overall summary, we went out and spoke to over 100 customers from across our region and asked them to take part in a complete replication of the WRMP consultation and we made sure this was as inclusive as possible and represented our communities and customers from all parts of our service area, allowing everyday customers to complete the survey. These uninformed views are summarised below in key stats for the options under consideration.

There are high levels of support for the following parts of the plan (% of those that support):

- Reflecting the best value plan so it is aligned with neighbouring water companies (93%)
- The strategy to develop new pipelines that will transfer water into our supply area (93%)
- Water recycling (100% - the most supported element of the plan – very important to customers)
- Investigating a new reservoir in West Sussex further to establish whether it could provide a new source for the area (97%)
- Looking at water recycling options where water is stored in reservoirs, lakes, or other water bodies as well as those where it is released back into nearby rivers and abstracted again (94%)
- Developing the pipeline network so we can move more water between our supply areas and share supplies with neighbouring water companies (96%)
- The ambition to proactively use catchment and nature-based solutions (96%).

More than three quarters of customers also agreed with the following elements:

- Stopping the use of drought orders and permits that allow us to continue abstracting from the environment after 2040 (77%)
- At least halving leakage by 2050 (75%)
- Continuing to use temporary water restrictions during droughts (77%)
- Using desalination to provide additional water supplies (83%).

6. Recommendations

Customers want a Southern Water WRMP that is more evidenced based and there is a need for more information on the cost implications and funding of these schemes.

Customers want a WRMP that is:

1. Affordable in the current economic climate
2. Environmentally responsible in everything put forward
3. Timely so that major actions happen soon, and decisions are not deferred into the future
4. Collaborative, holistic and joined up so it aligns with the shared goals and ambitions of other water companies and relevant agencies
5. Innovative in-solutions developed to meet some huge potential shortfall numbers

With regards to the options that are under consideration there is a consistent preference for options that have:

- **more immediate impact**
- **are more environmentally friendly**
- **make the most out of existing resource**
- **are sustainable**

From informed customers (and uninformed) there is support for stopping drought orders, as well as for building new reservoirs and water recycling plants. There is also clear and consistent feedback that customers want Southern Water to push harder on leakage and increase ambition from 50% reduction by 2050. By contrast, there is less overt support for desalination, water transfers, and increasing groundwater supplies and improving abstraction processes – all of which hit the 4 markers listed above less.

Against a backdrop of general support, the WRMP can be strengthened by providing reassurance in 5 key areas:

We can strengthen by providing reassurance in 5 key areas

1. That plans are flexible and can be adapted if future scenarios change
2. That improvements will not be funded solely by increases in customer bills
3. That people are communities will not be negatively impacted by plans
4. That Southern Water have transparent benchmark measures for targets
5. That Southern Water have a considered rationale behind all their decisions

7. Who we partnered with

We partnered with several of our rostered agencies to ensure a wide breadth of customers were engaged as part of the consultation and making use of existing BAU panels we have with specific audiences:

- Relish run our informed panel for Water Futures 2030 which has been running since 2020 and has brought us closer than ever to our customers. This gives us the opportunity to understand what household customers want/expect from us now and in the future.
- Turquoise run our informed Water Futures Vulnerable customer panel – giving a voice to our customers who need the most support and they also undertook the independent quantitative survey with ‘customers on the street’.
- Britain Thinks were awarded MRS agency of the year in 2021 and run our Water Futures 2050 and Water Futures Business panel and have been engaging with young people/future customers and businesses for a number of years. This has really enhanced how this audience taps into our long-term strategy and planning process.

