

Turquoise



Southern Water WRMP Consultation

Full Colour Thinking from Turquoise for Southern Water

February 2023

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Project background.



Southern Water cover a large area of the South East from the heart of Hampshire right across to the coastline in Dover. Within their operating area they supply customers from a range of demographics, backgrounds and cultures.

Southern are looking to develop a clearer understanding of customers and communities. As they prepare for their next Business Plan (2025-2030), they will be looking to better understand regional differences so they can tailor investment in their region. Ofwat are also focusing on regional differences in their recently published paper on PR24 and beyond. The objectives for this project will ensure Southern are maximising their understanding of those differences in communities they operate within.

Southern Water (SWS) wished to engage with a sample of independent, uninformed, reflective group of customers from across the region (between 100-200 people). They wished to garner the views of the layman on the street; the everyday customer. The key objective of this research project were to better understand customer reactions to the SWS WRMP24 Plan.

As such there was the need to recruit this group of customers, to get them to read the WRMP summary document and to complete the consultation questions.

Turquoise were commissioned to conduct this research and the following document reports the key findings from the sample of 102 customers who participated.



Method & Approach.



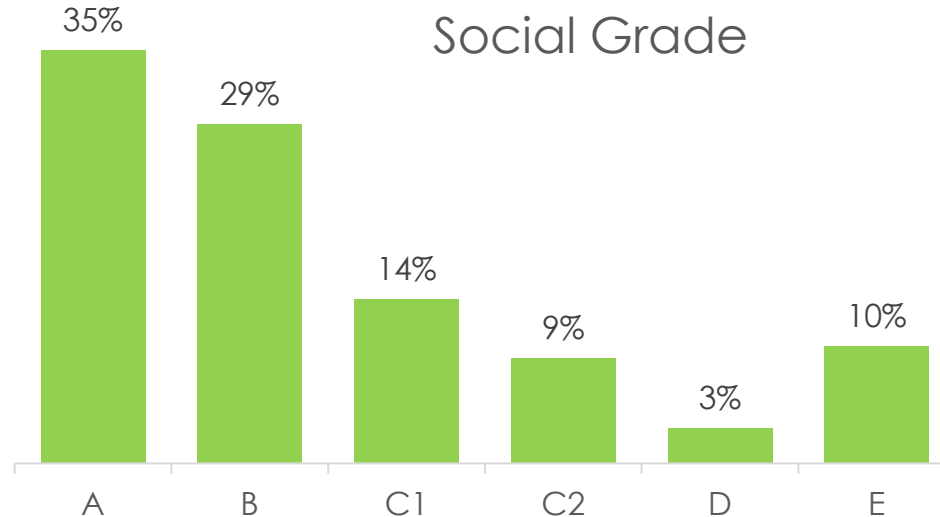
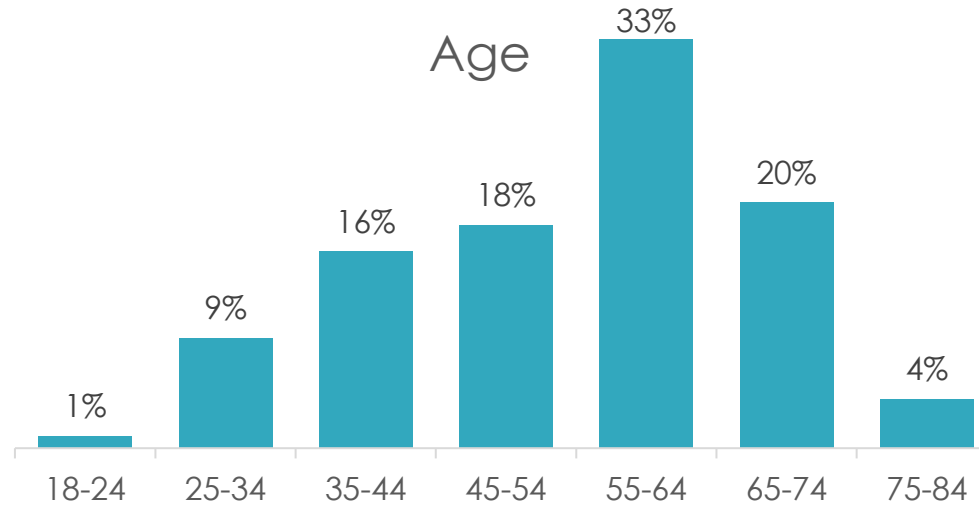
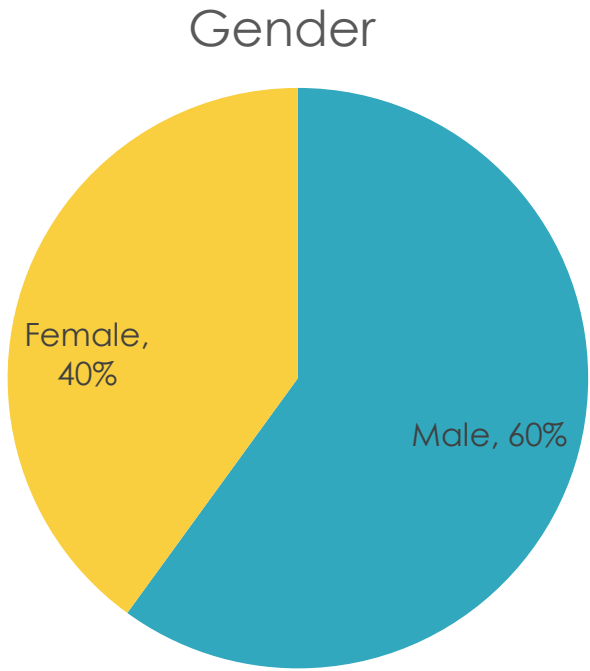
Project Overview	Approach	Sample
To better understand customer reactions to the SWS WRMP24 Plan	An initial recruitment exercise to recruit participants to read the document followed by the final exercise whereby the document was provided to customers and their views collected via an online survey.	102 customers from across the Southern Water region, a mix of gender, age, social grade, satisfaction levels and attitudes towards nationalisation.



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Sample Background

Gender, age and social grade profile.



A good mix was achieved in terms of gender, age and social grade.

There was a male bias to the sample with 60% of those participating male and 40% female. This bias was more prevalent in Hampshire where the split was 77% versus 23%.

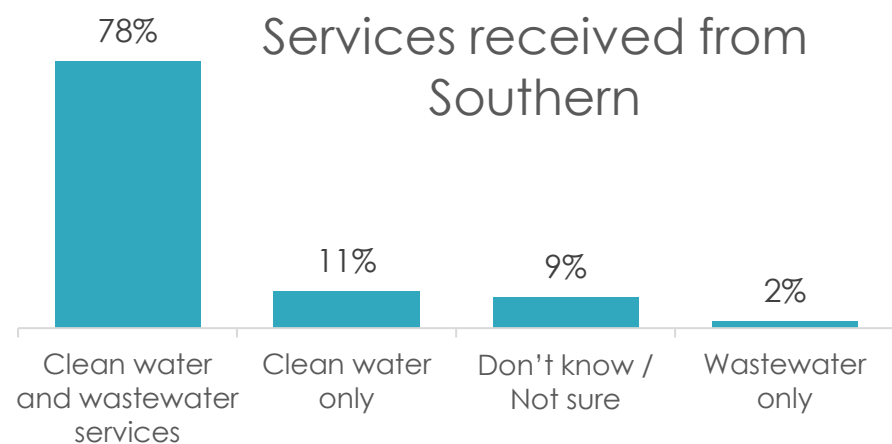
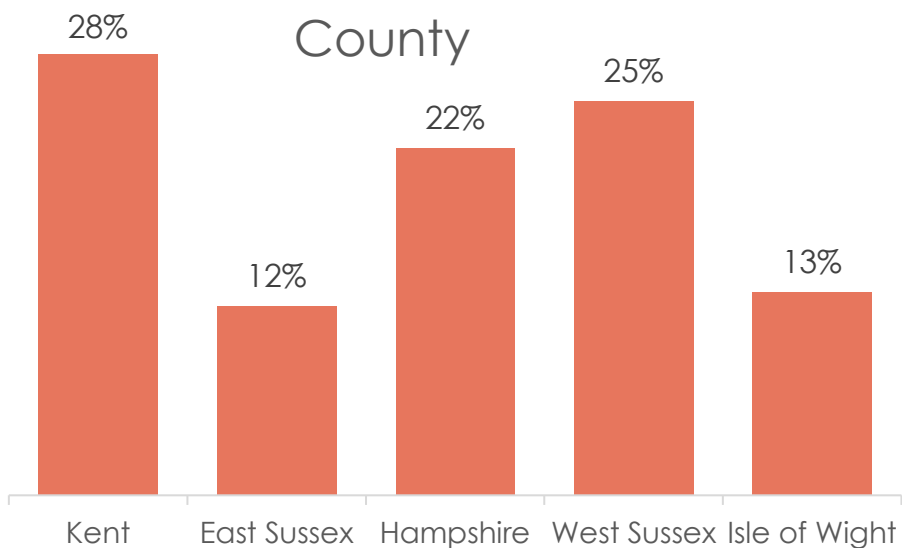
The most represented age group overall was 55-64 (33%).

72% indicated that they were the main income earner in the household whilst 9% indicated that there were no income earners in the household.

When it came to occupation 35% selected Higher managerial, administrative or professional meaning they fall into the A social grade category (however as this is self selecting it may not be a true representation of actual social grade).

Total Sample Base = 102

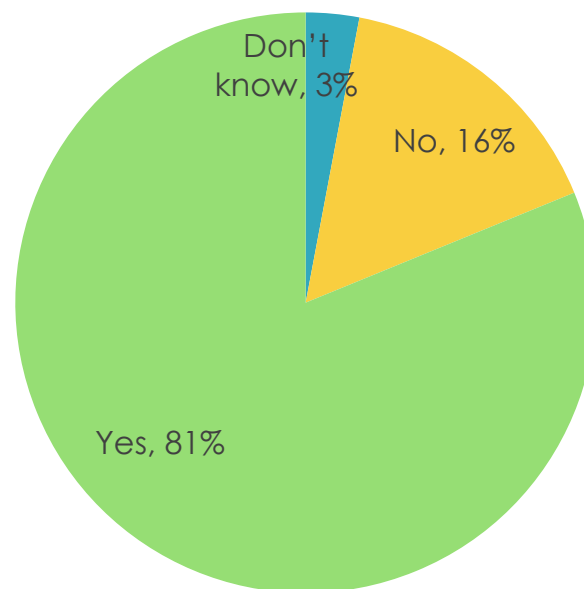
Location & services received



Total Sample Base = 102

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Water meter?



There was representation of all counties across the Southern Water region with Kent being the most represented overall with 28%. Isle of Wight and East Sussex customers accounted for the smallest proportion overall with 13% and 12% respectively.

The majority (78%) received clean water and wastewater services from Southern Water whilst 11% received clean water only. Just 2% were wastewater only.

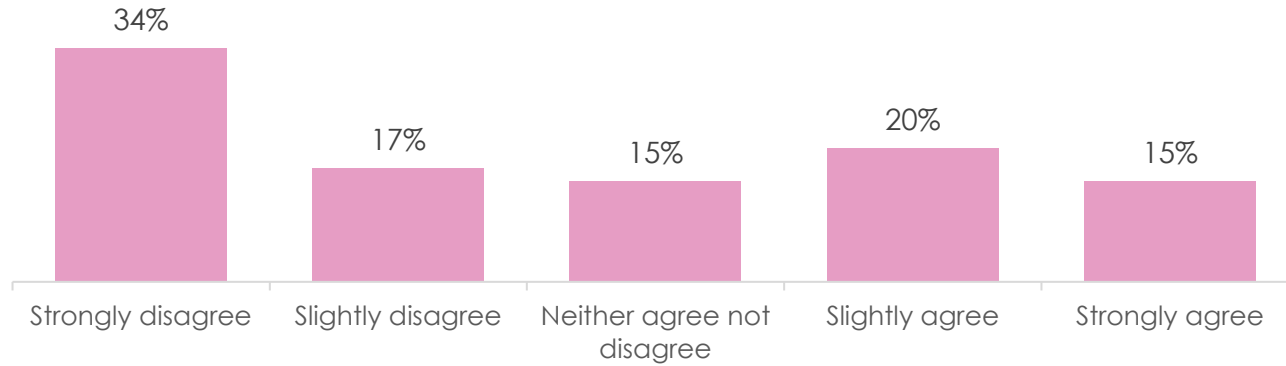
81% indicated that they had a water meter.

No customers surveyed received any financial support from Southern that they were aware of and 4% were on the priority services register.

Affordability and bill values.

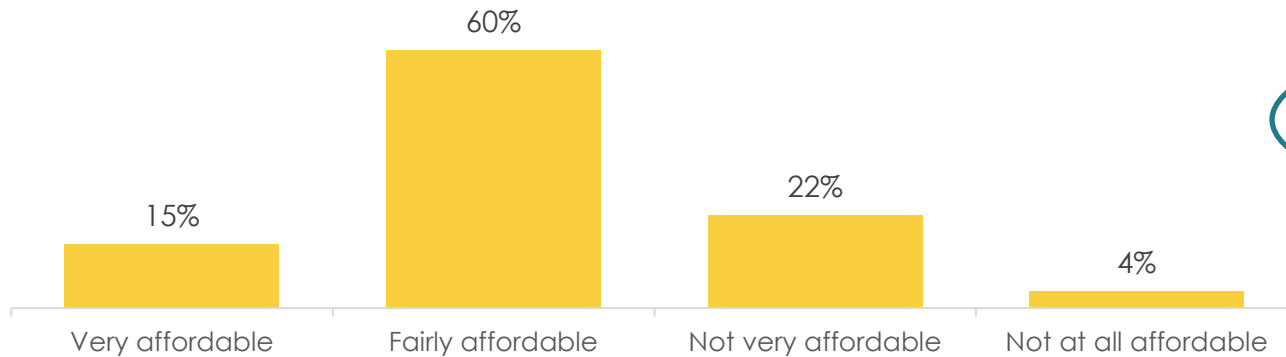


To what extent do you agree or disagree with the following statement - "I sometimes struggle to pay all my household bills"

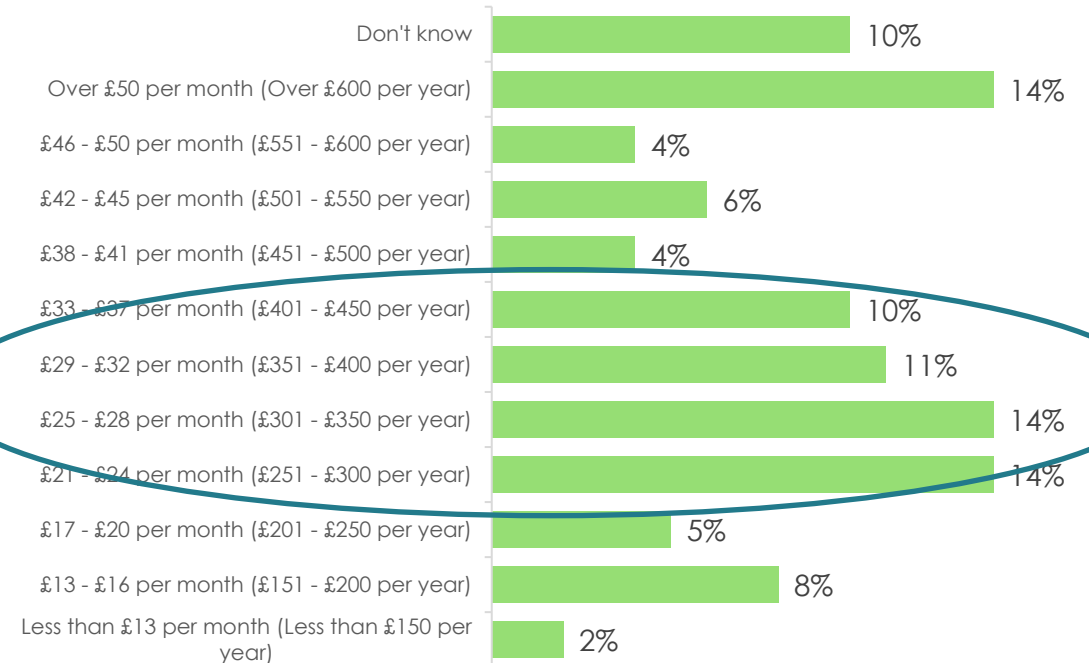


35% agreed that they sometimes struggle to pay their household bills however 75% found their Southern Water bill at least fairly affordable. 49% paid between £21 and £37 for their Southern Water services per month.

Thinking about how much you pay for your water and/or sewerage services, how affordable is this for your household?



What is the total amount your household pays for the services received from Southern Water per month / year?



Total Sample Base = 102

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Satisfaction with Southern Water.



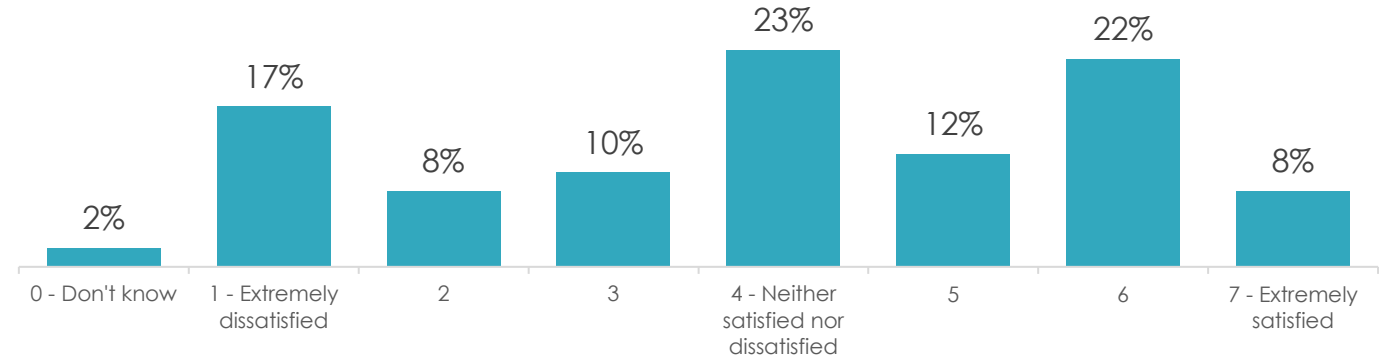
Overall 41% of customers indicated that they were satisfied with the overall service provided by Southern Water whilst 34% indicated that they were dissatisfied (with the majority of these saying they were extremely dissatisfied – 17%).

Similarly 34% indicated that they were satisfied with the value for money of the services received from Southern whilst 33% were dissatisfied. Again in terms of dissatisfaction there was greater likelihood to choose the extreme of 1 – extremely dissatisfied (16%).

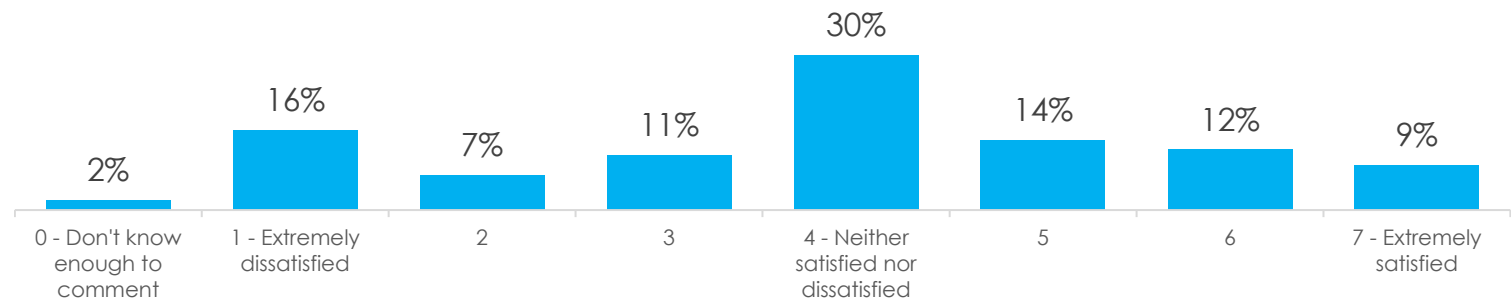
Looking by county there are some differences to note (although none are significant).

- **East Sussex** (Overall Service – 58% satisfied & 42% dissatisfied, VFM – 50% satisfied & 17% dissatisfied).
- **West Sussex** (Overall Service – 31% satisfied & 38% dissatisfied, VFM – 23% satisfied & 42% dissatisfied).
- **Kent** (Overall Service – 31% satisfied & 28% dissatisfied, VFM – 31% satisfied & 34% dissatisfied).
- **Hampshire** (Overall Service – 59% satisfied & 32% dissatisfied, VFM – 45% satisfied & 27% dissatisfied).
- **Isle of Wight** (Overall Service – 38% satisfied & 38% dissatisfied, VFM – 31% satisfied & 38% dissatisfied).

How satisfied are you with the overall service you receive from Southern Water?



Again, thinking about Southern Water, how satisfied are you with the value for money of the services you receive from them?

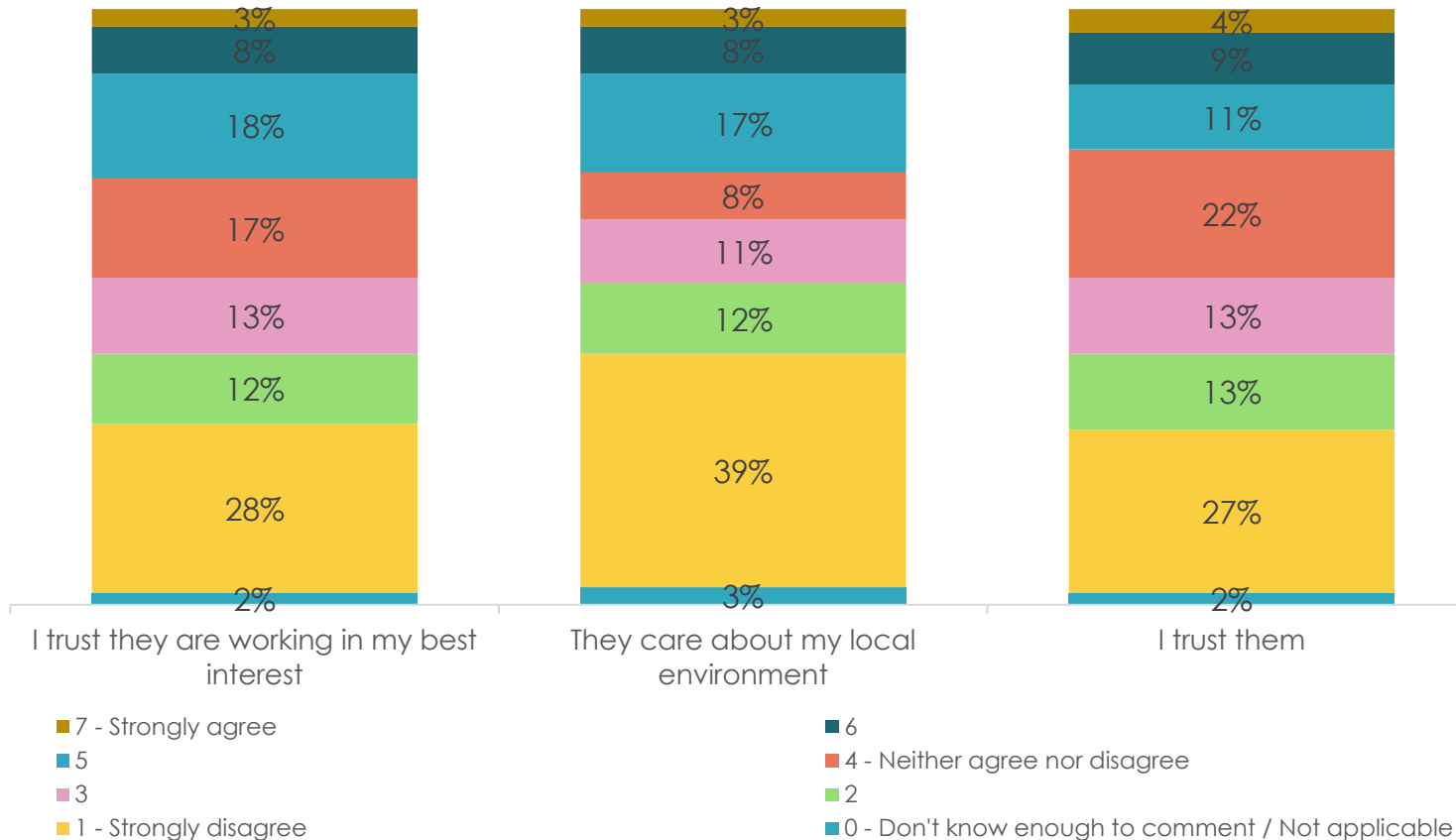


Total Sample Base = 102

Agreement with statements about Southern Water.



How much do you agree with the following statements about your water and/or waste water provider, Southern Water?



The statement that sees the highest level of agreement is ***I trust they are working in my best interest*** (28%). However they are all quite similar in terms of agreement levels (***They care about my local environment*** - 27% and ***I trust them*** - 24%).

The highest level of disagreement was noted for ***They care about my local environment*** (62%). For the other two statements disagreement was as follows:-

- ***I trust they are working in my best interest*** (53%)
- ***I trust them*** (53%)

This highlights a lack of trust amongst the sample towards Southern and a perception there is a disregard for the environment from them.

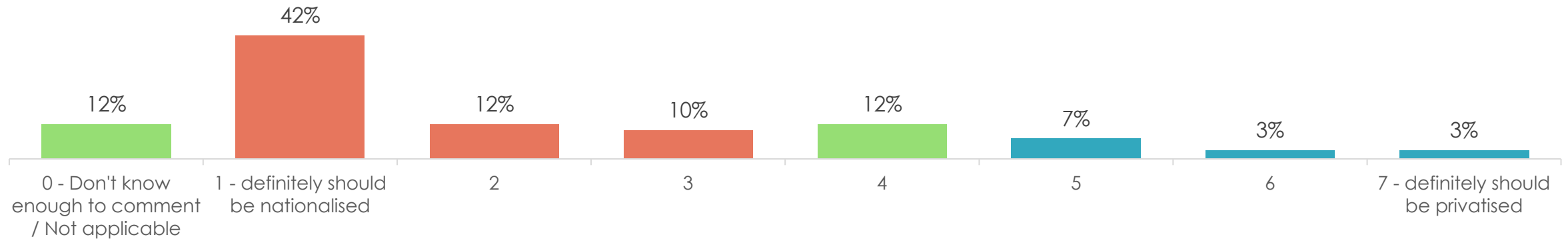
Total Sample Base = 102

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Views on the nationalisation of the water industry.



To what extent do you believe the water and wastewater industry should be privatised or nationalised?



Total Sample Base = 102

Combining values 1, 2 and 3 we see that 64% of the sample felt that the water and wastewater industry should be nationalised. In comparison when combining 7, 6 and 5 we see that only 13% felt that the industry should be privatised.

Looking by region we see the following views (however, none of these are statistically significant).

- East Sussex – 75% in support of nationalisation, Kent – 66% in support of nationalisation, Hampshire – 64% in support of nationalisation, Isle of Wight – 54% in support of nationalisation and West Sussex – 62% in support of nationalisation.
- If customers cited dissatisfaction with the overall service provided by Southern they were significantly more likely to be in support of nationalisation (83%). Similarly if they disagreed with the statement ‘I trust them’ – 87%.

Summary – points to bear in mind that will influence how customers view the WRMP.



Majority of those who responded to the survey are reasonably comfortable with regards their bills and affordability - 34% indicated that they sometimes struggle to pay their household bills whilst 25% find their Southern Water bill unaffordable.

Opinions are very split in terms of satisfaction with Southern Water with 17% indicating that they are *extremely* dissatisfied with the overall service that they receive. Although the amount satisfied with overall service just beats those who are dissatisfied (41% versus 34%) there is much less difference when it comes to value for money (34% satisfied versus 33% dissatisfied).

It is clear that there is a lot of distrust both with Southern themselves and with regards to them working with customers best interests in mind. Equally there is little faith in Southern Water looking after the environment.

There is strong support amongst the sample for the nationalisation of the water and wastewater industry. This may reinforce a lack of faith in Southern to be able to do the job effectively which may impact their views of future plans.

Other caveats to note:-

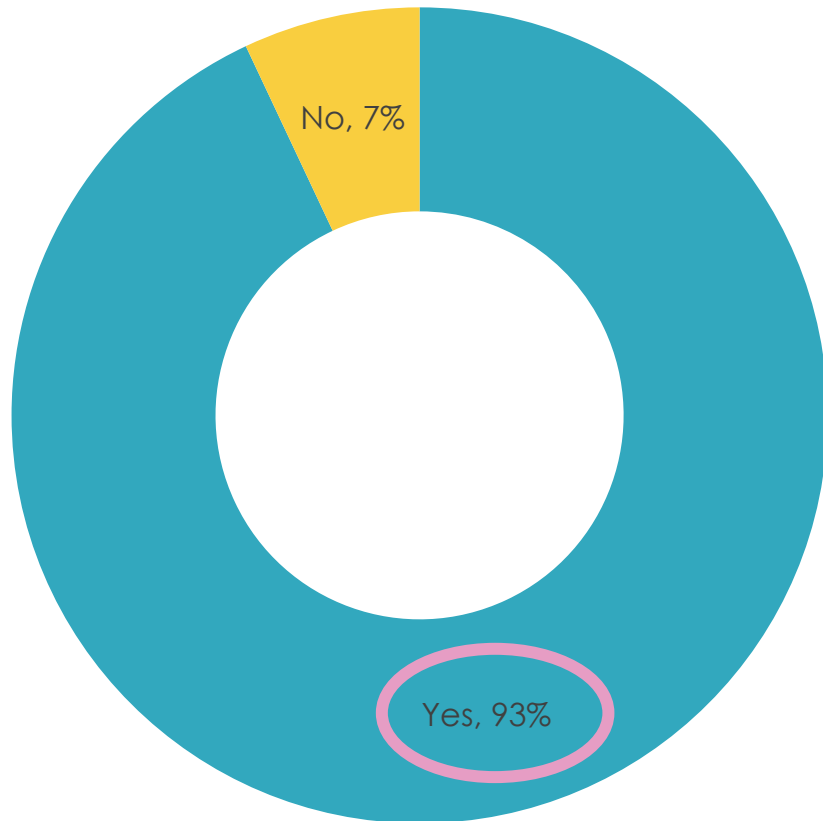
Despite the WRMP being the summary document many customers still found it quite a task to consume / digest and give comments on. It is clear that there was some confusion and misinterpretation of some of the details with yes / no answers not always being how customers wanted to give their feedback (or their answer couldn't be summarised by a yes / no response).



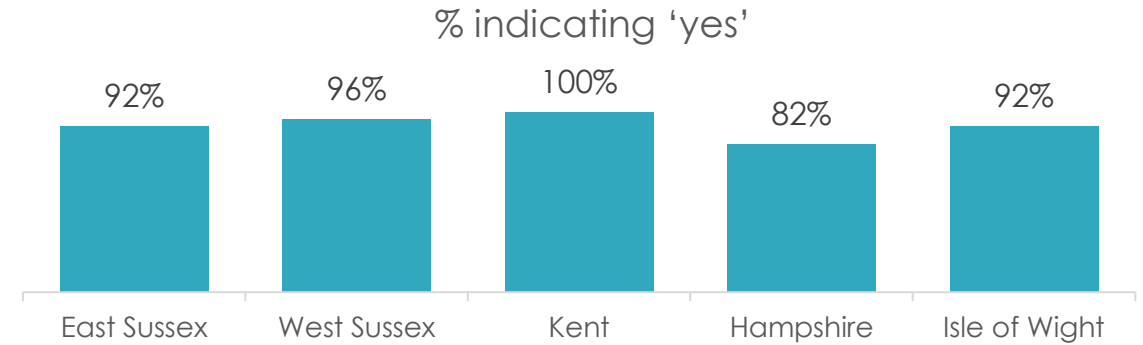
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Key Findings

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



Total Sample Base = 102



93% of those surveyed agreed 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% respectively).

There were no significant differences to note in terms of who was most likely to say yes however the following was observed:-

- Females were slightly more likely to say yes than males (98% versus 90%).
- 100% of those aged under 55 said yes (compared to 85% of those aged 55-64 and 92% of those aged 65+)

Key themes behind why customers supported this – just make sense, always better to work together, could be easier to fix problems / get better outcomes with collaboration between companies.

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



Yes - I think it's important that neighbouring companies work together for the wider goal. The problem is not solely within our region, and the environmental impact as a whole is an issue that needs to be resolved across the board, not just within our region, so it's important for companies to be aligned.

East Sussex

Yes - 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.

Kent

Yes - Likely future challenges will almost certainly require co-operative actions rather than 'ploughing a lone furrow' so it makes sense for neighbouring water companies to be 'sing from the same hymn sheet'

Isle of Wight

Yes - It is important for water resources to be considered on a regional level, rather than just having each individual water company working in a silo on its own resources. A regional and even national approach better serves the environment and customers.

West Sussex

No - Their plans might not be in the best interests of their consumers or the environment. Being able to say "Well all the other companies are doing it" will just be seen as an excuse for bad planning on WRMP's part.

Hampshire

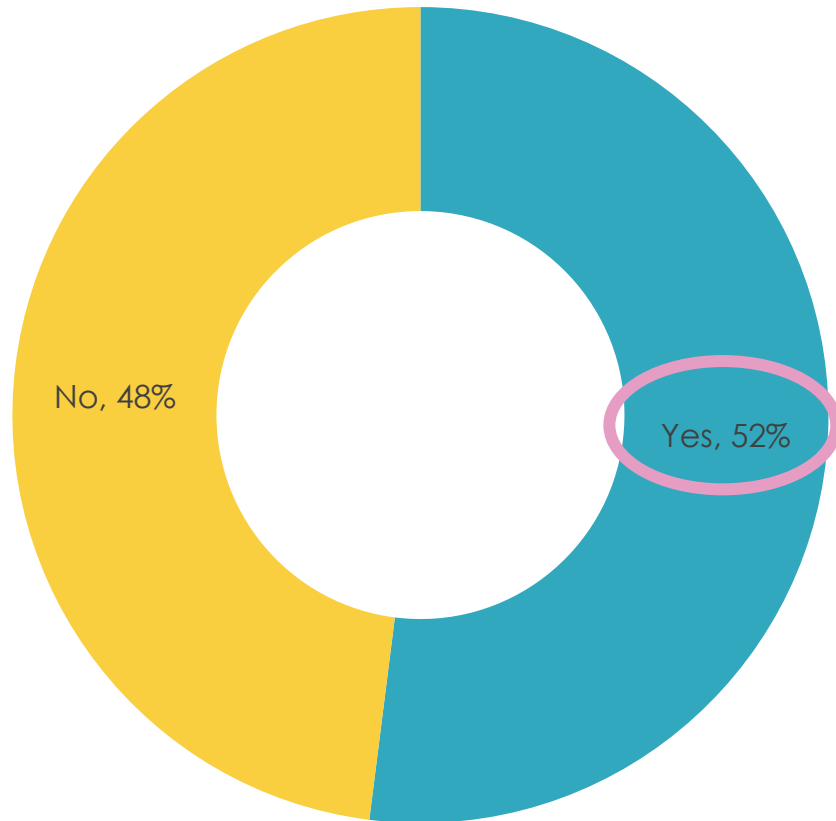
Yes - It is important to align to regional partners in order to fit in to the bigger picture. Water management is not just a regional thing but involves larger movements of water

Hampshire

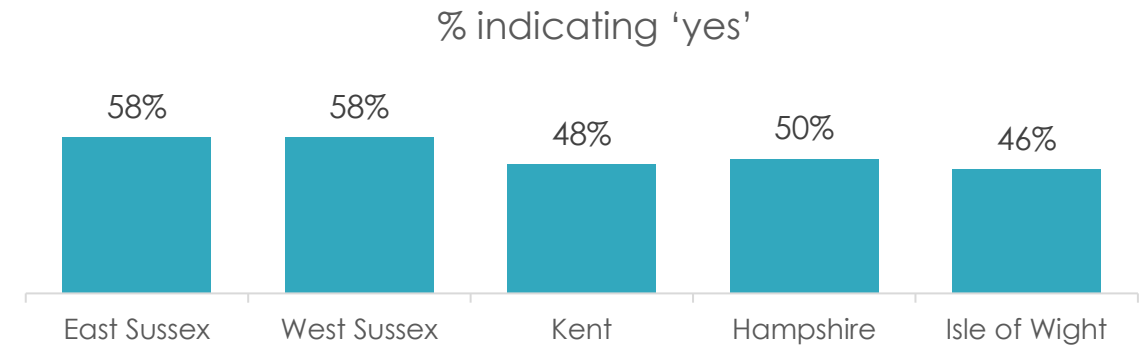
No - Not necessarily, although water costs should be equal for all users across the UK.

Isle of Wight

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?



Total Sample Base = 102



52% had comments or concerns about the level of service in the Central area and Southern's plans to address it. Customers in Sussex were the most likely to have comments or concerns (58%).

One difference to note (although not statistically significant) was 55-64 year olds were more likely to have comments (71%) in comparison to the other age groups.

Key themes behind comments – lack of investment and not fixing leaks is why there is a problem, 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?

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?



Yes - Could do more education with customers and larger non household users about water use and efficiency
West Sussex Sussex

Yes - It is a complete disgrace that Southern Water seeks to offload its failure to invest appropriately over the medium term onto consumers. There is time to create infrastructure. There are ever-growing quantities of free raw materials (rain) and yet this company wants to blame and penalise consumers.
Kent

Yes - It is surely critical that levels of service are comparable throughout your area otherwise those within, eg Central area, are disadvantaged by where they live.
Isle of Wight

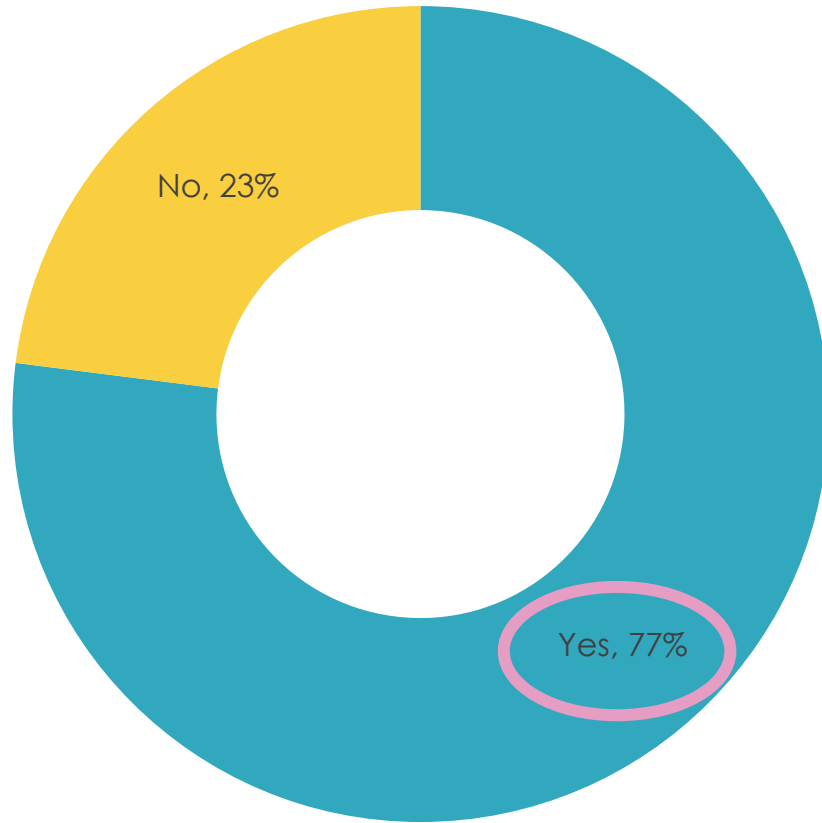
Yes - I'm very glad that addressing this problem is now part of the strategic plan.
West Sussex

Yes - I believe the plan to address this should be to increase water storage facilities and it seems like the current situation is a little last minute. The situation we are in was predictable 20 years ago but here we are with nothing yet done. We should not continue to abstract water from our river systems when we know they are in drought.
Hampshire

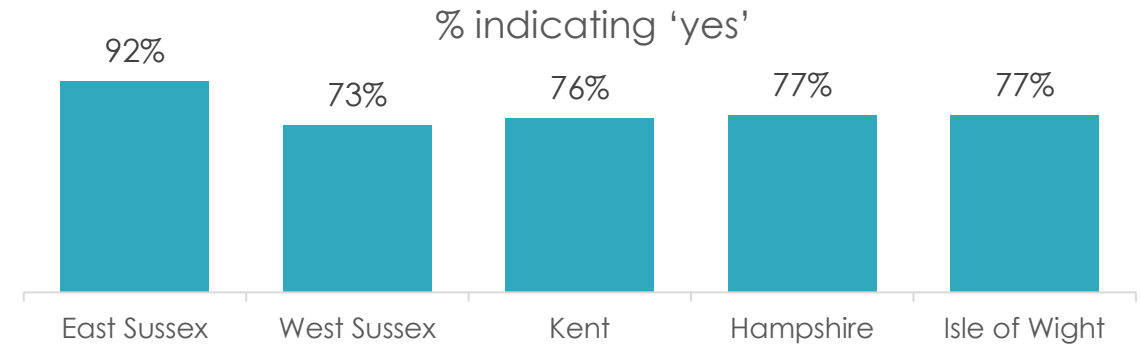
Yes - Restrictions on personal water use and concomitant changes to lifestyle are inevitable; and customers need to understand their personal responsibilities. The days of treating such resources as limitless, and eschewing personal responsibility must come steadily to an end; and curbs on personal practice are a useful spur and corrective.
East Sussex

Yes - Dealing with a shortfall by restricting supply and uptake of your product cannot be as good a solution as prioritising reduction of losses (leaks) so that customers can get equal access.
Hampshire

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?



Total Sample Base = 102



Just over three quarters 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%).

Key themes behind comments – thought it was the right approach, made sense, protecting the environment is very important however, customers were more likely to think the timescales were not stretching enough as opposed to being acceptable → would like targets met sooner.

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?



Yes - Yes and No: Developing new water supplies is essential. If the population growth projections are accurate, it seems unlikely new demand can be met just through reduced per capita consumption, improved leak control etc. But the time scale seems arbitrary, and your company is making a proposal. Predicting the impact of climate change is already proving difficult. If you fail to reach your targets over the next decade for whatever reason, I assume targets will shift accordingly, and plans will be updated.

East Sussex

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

Kent

No - I think the proposed timescale is disappointing. Water has been an issue for quite some time and I think you have been slow to address supply and leak issues

East Sussex

Yes - New water supplies should be in the course of development as an ongoing project otherwise you will not be able to keep up with unknown increases in consumption. It is difficult to set timescales for delivery as future difficulties are unknown.

Isle of Wight

Yes - Obviously improvements take time. But climate change doesn't know that. If our country gets hotter we are going to need more water. So the sooner these works are implemented the better.

West Sussex

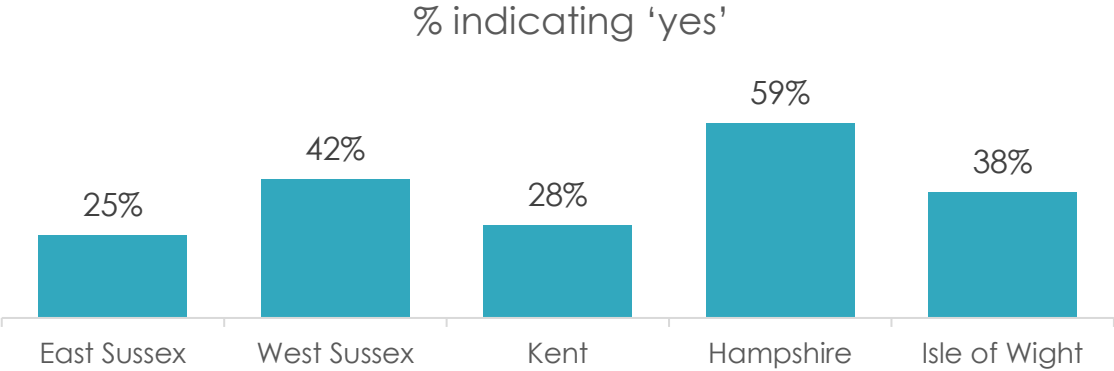
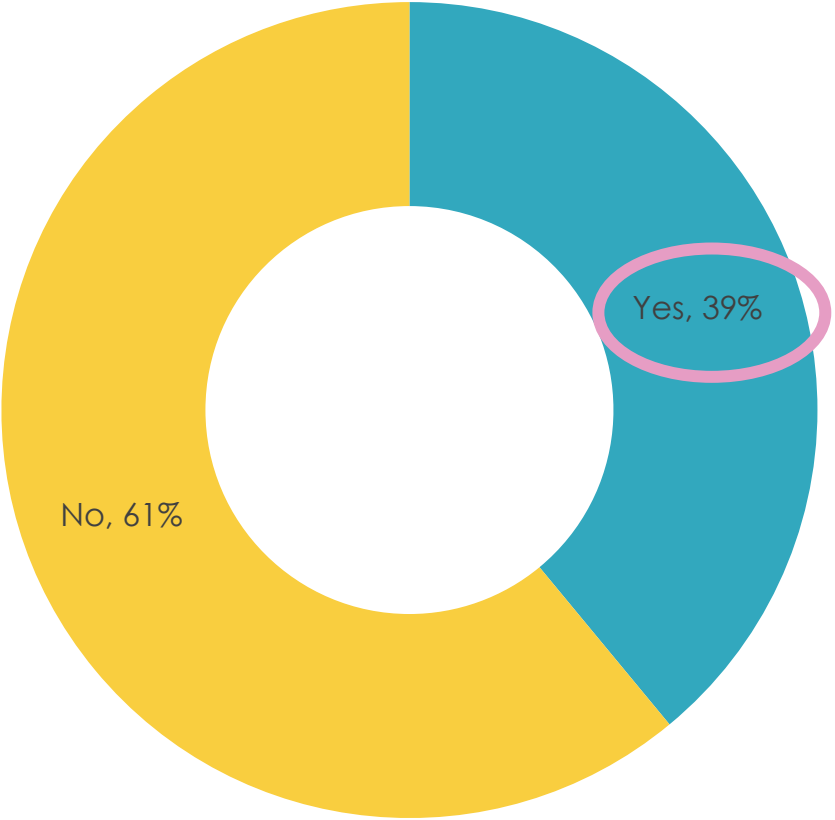
No - We should be doing more and more quickly to protect the environment we live in. Once habitat is destroyed it is far more difficult to replace so options should explore bringing the 2040 date forward. These targets just aren't ambitious enough to protect the planet.

Hampshire

Yes - To create a new way of supplying water is not something that can be accomplished overnight so I think the timescale is about right

Hampshire

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?



Just **39%** believe that there are future scenarios that Southern Water should be considering in their adaptive planning approach with customers the most likely to say this.

However, when asked for their comments the majority did not actually relate to other future scenarios that had not been considered, most were questions or queries or comments on the plan itself or comments about sewage / waste water.

Total Sample Base = 102

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?



Yes - I'd like to see a clear structured plan to eliminate wastage on your part through poor maintenance and old pipes.

East Sussex

Yes - Whilst I realise desalination is expensive and not always environmentally friendly I think the sea is an untapped resource I'd like to see more use of water particularly in areas where salt and fresh waters meet

Kent

Yes - A less consumerist approach; a societal move away from what are still arguably an odd hybrid of post industrial Victorian/1990s consumer values. I think the company is banking on 'more of the same'. There's absolutely no guarantee we will collectively behave the same way or hold the same values in another 20-40 years.

West Sussex

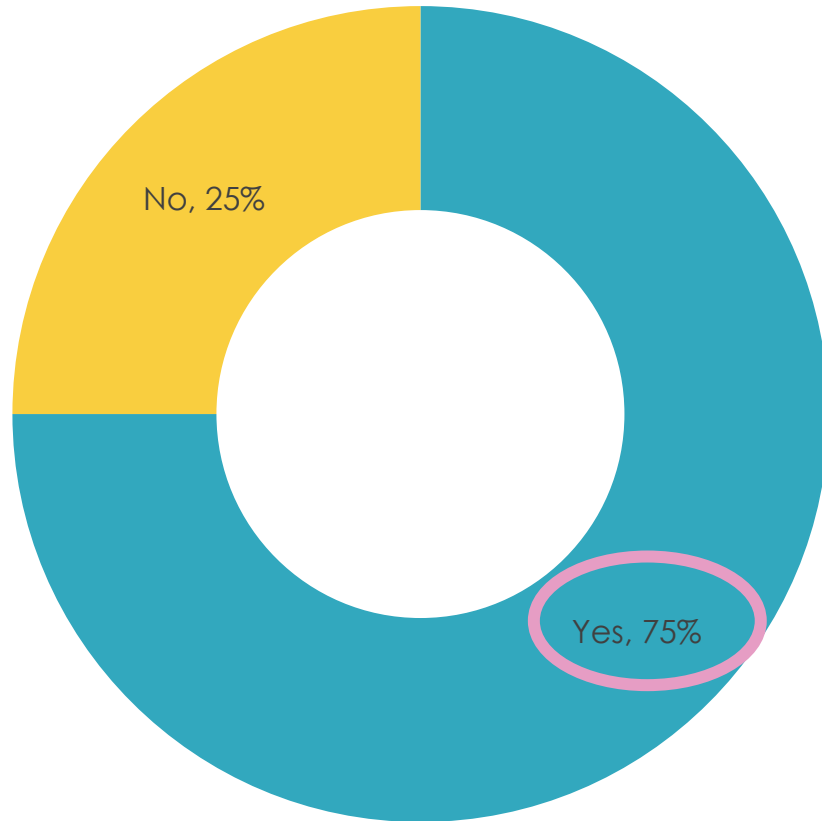
Yes - There are always going to be unexpected scenarios. Plan for them all. Could save money long term. Sometimes you have to spend and do a proper job to save money in the future . TEACH. Teach us how we can help but get the message across in a way that we feel its going to benefit us and our children.

Hampshire

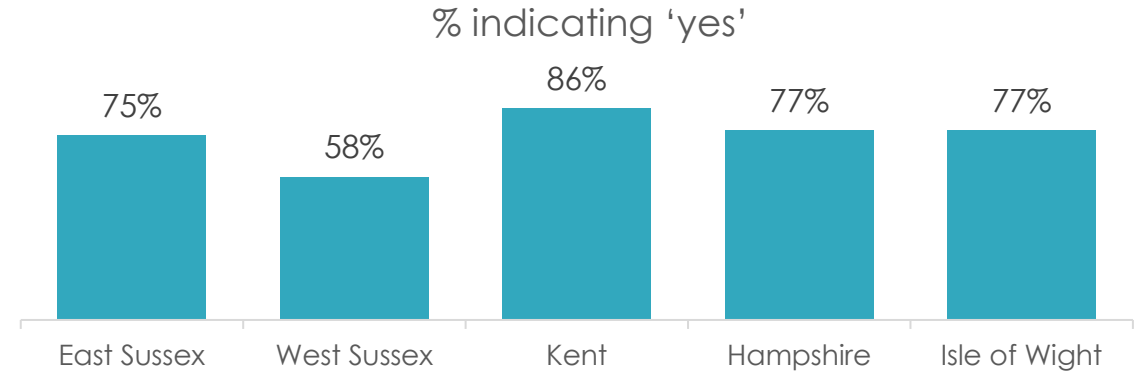
Yes - I think you should consider the way that coastal communities are being impacted by rising sea levels, which will start to occur at some point.

Isle of Wight

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



Total Sample Base = 102



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%).

It was clear that this was a key priority for customers with all those who said that they did not support the plan saying it was because they wanted it to be more ambitious / more aggressive / to happen sooner. Even for those who agreed many said they would hope it could happen sooner or the target to be more than half.

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



Yes - Although once again it could be done more quickly. Also past performance in this area doesn't provide much optimism that this target will be met.
East Sussex

Yes - Water wastage through leaks is a big problem. It needs to be addressed as we genuinely realise our victorian plumbing system is not fit for purpose.. I hope this figure is realistic and that maybe you can increase the reduction in percentage of leaks fixed
Kent

Yes - I consider this to be a worthy aim and a substantial leakage reduction is vital if you are to achieve your other objectives
Isle of Wight

Yes - Yes a definite area for improvement. Why is the target not higher?
West Sussex

Yes - Water leakage is a huge issue. As stated before, I think that new technologies e.g. smart technologies are key to adapting to new challenges. I was pleased to see that you agree too.
Hampshire

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



No - Would like it to be more aggressive, although understand the point of "diminishing returns" as more are fixed. Would like to know expected runway, as 2050 is a long time away. I would expect at least 25% reduction in first 10 years then maybe at least other 25% in following 18 years.
East Sussex

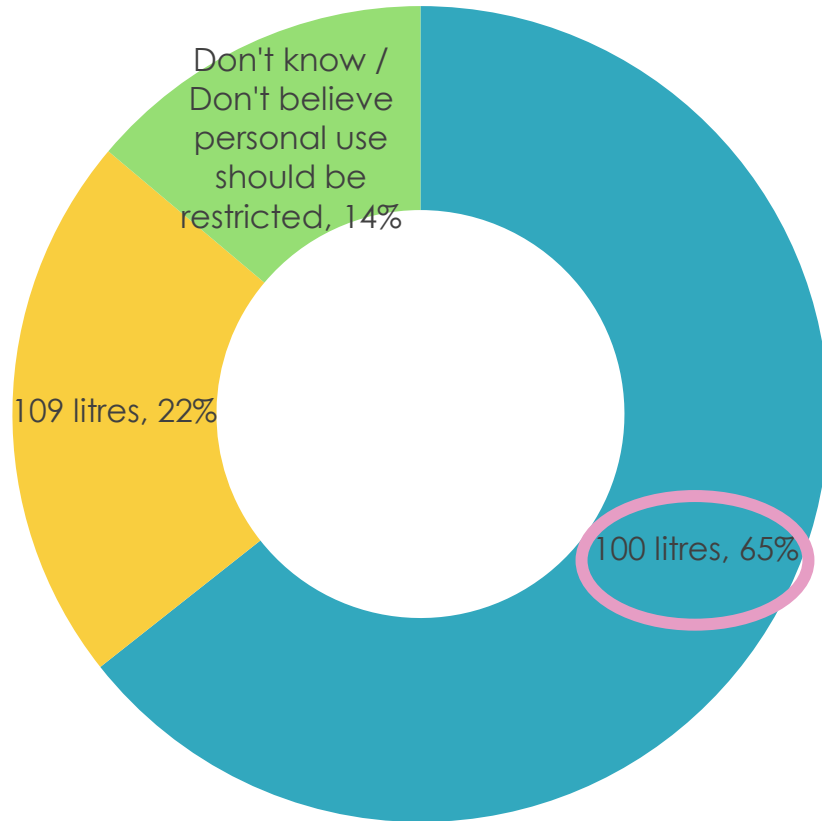
No - Needs to be done much quicker. Resources could be diverted from less urgent projects to achieve this. Modern technology used to investigate leakage would also help this goal to be achieved ahead of the proposed 2050, say by late 2040?
Kent

No - think you could up the expectations beyond half, wasting water through leaks is ludicrous.
Isle of Wight

No - The plans need to be much more ambitious with a higher level of investment. The rate of pipe renewal in the SE (and in the UK in general) is amongst the lowest in the world - this must change. The current targets are inadequate. Rate of water leaks and pipe renewal by company and region should be published on at least an annual basis to enable clear comparison between water companies and regions also between the UK and the rest of the world. We need to know if we truly have a water system fit for a developed country.
West Sussex

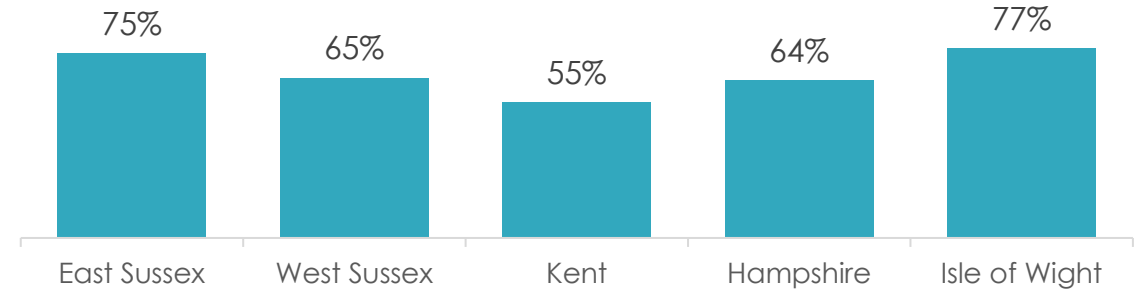
No - This isn't ambitious enough.
Hampshire

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?



Total Sample Base = 102

% indicating they support the more ambitious target



Just under two thirds of customers surveyed supported Southern Water retaining the more ambitious target of 100 litres per person per day by 2040 (65%).

Customers in East Sussex and the Isle of Wight were most likely to be in favour of retaining the more ambitious target (75% and 77% respectively) whilst customers in Kent showed a slightly greater likelihood than the average to prefer the more conservative target of 109 litres (34%).

Key themes behind comments – the target should always be more ambitious, timescale is not stretching enough, more education and support needed for customers to achieve this, some incentives could be beneficial to encourage more personal responsibility and desire to save water.

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?



100 litres - I think you should retain the more ambitious target of 100 ltrs per person per day by 2040. However, most people, me included, have no idea that we use too much water and that we need to reduce. I only think of reduction in relation to cutting my water bill. I have a general sense that it's a good idea to reduce water use, but i didn't realise that there are targets or that in this region we really need to do this.

East Sussex

100 litres - Even if you don't attain 100l target by aiming for it you are more likely to reach/surpass 109l.

Kent

100 litres - I do think its possible but currently most people have no idea that they should be saving water, why are there no campaigns to explain to people how to manage their water consumption and why its so important.

Isle of Wight

100 litres - I think the lower number should be the goal. A concerted push on educating customers will help. We take notice of the information on our bill showing our use versus the average and pride ourselves in being a low use consumer. Getting more people thinking this way can only help

West Sussex

100 litres - I think try to achieve the 100L per person per day by 2040 even if this is not achieved any reduction in usage is good.

Hampshire

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?



109 litres - I think we can all play our part. An average reduction to 109 litres from 134 must be possible.

East Sussex

109 litres - People in general are averse to forced change and a slower reduction is likely to perform better

Kent

109 litres - I think trying to achieve 109 litres a day is more sustainable at present.

Isle of Wight

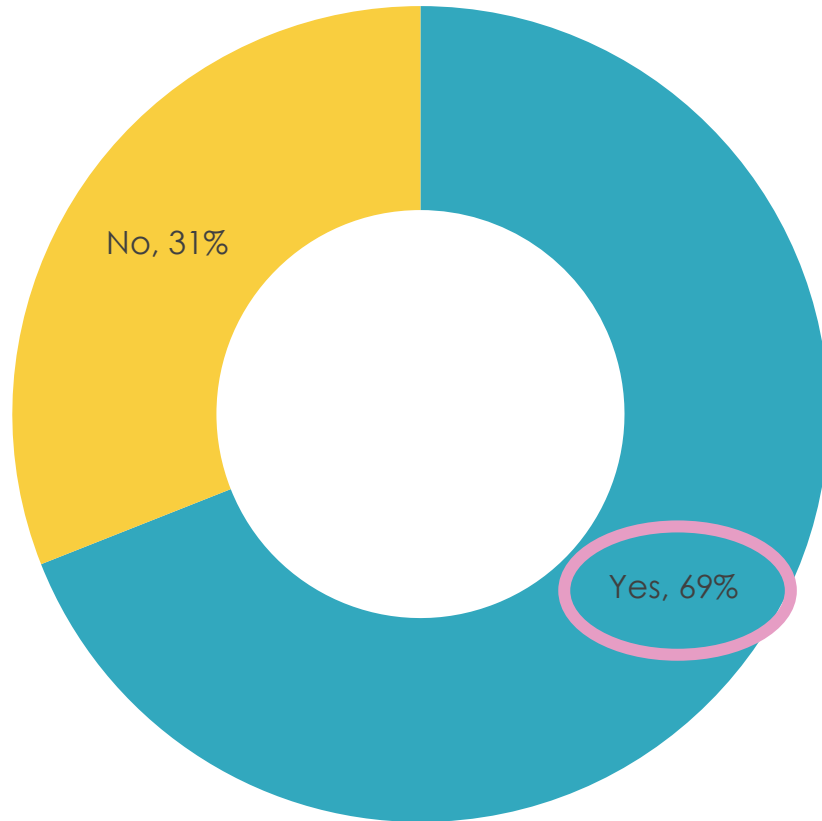
109 litres - If you are too ambitious then you may not hit targets. The population need to be educated more on saving water to meet those targets. Stick with the 109 litres to be on the safe side.

West Sussex

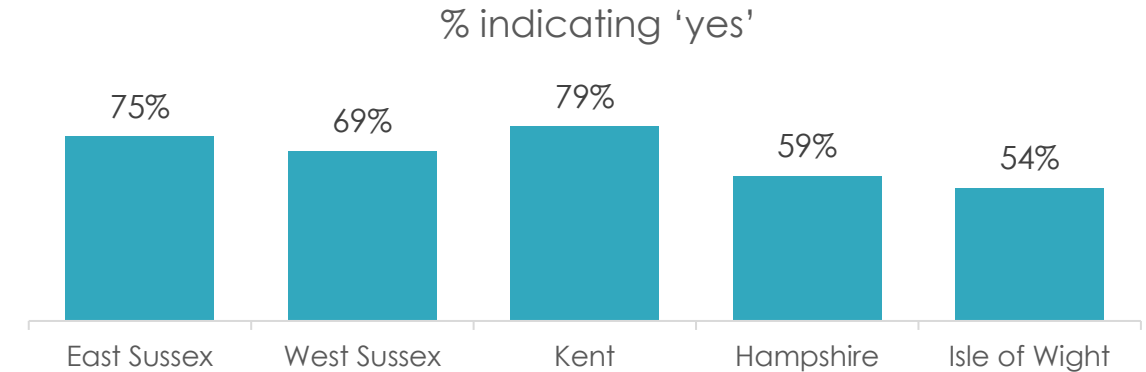
109 litres - I think 109 is more realistic but it all depends on the impact and delivery of some of the ideas to help reduce this and the public's reaction to this. Education at all levels through ads, emails etc. as well as also reaching schools and people at a young age who by 2040 will be the generation responsible at that point is important. Smart meters too certainly have helped me reduce and be more wary of electricity use so something similar for water would also contribute, as money is presumably the number one motivator for reducing water use alongside the environment

Hampshire

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



Total Sample Base = 102



69% were in support of additional proposed Government interventions and the timing of their introduction.

Customers in Kent were most in support of this (79%) whilst this was less the case in the Isle of Wight (54%).

Key themes behind comments – Government interventions may mean greater accountability / action / more control however the timescales are too far into the future, they need to be sooner.

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



Yes - I think it's important to have the government support and the minimum standards for devices and building regulations are key to the journey of reducing the water waste and usage. I think that perhaps the timescale could be shorter, so the government interventions to be introduced sooner but understand that there are other things that must be in place before we can do this.

East Sussex

Yes - I do not trust Water Companies to act in consumers best interests, so Government oversight is needed.

Kent

Yes - Yes, become transparent and accountable - change the way you have been working - work WITH your customers, not AGAINST them in the name of profits and shareholders.

Isle of Wight

Yes - But not fast enough. Is no one really taking seriously how fast things are changing/ have already changed/ will change in the years ahead? It does feel as if very few people involved in this industry are going to be able to perform to the levels that are actually required. Where's the ambition? Where's the focus? Where's the commitment? Where are the skills? Where are the results?

West Sussex

Yes - The track record of interventions of the present government is not at all good, but I do agree that some level of control is needed as it will deliver more consistency in approach between water companies, make it easier for customers to understand, and ultimately make it more likely that the targets are met. It will require a complete change in government however. The current lot are untrustworthy talentless elf serving charlatans.

Hampshire

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



No - Yes to support the interventions but no to the timeline. 2060 is ridiculous, we can't wait that long
East Sussex

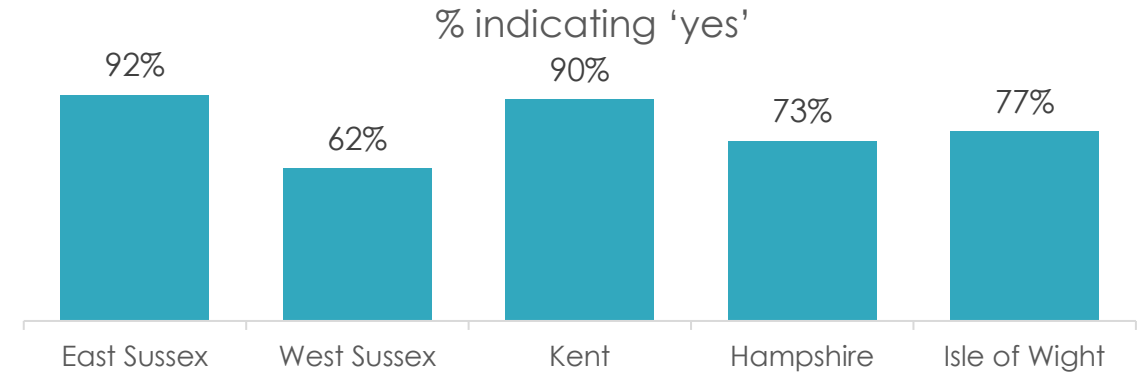
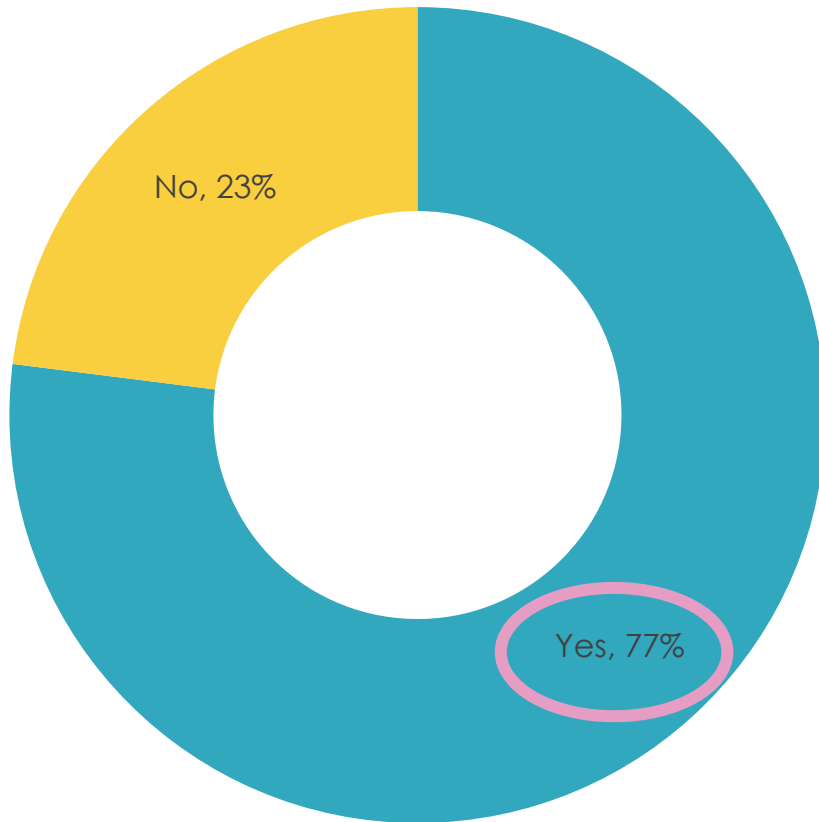
No - Since water companies are privately owned, the government shouldn't need to help in any way. I don't want my tax money to be used to prop up shareholder dividends.
Kent

No - As per many legislative targets the parameters therein are either often not achievable, not achievable within the stated timeline(s), or enable excessive time frames. That applied to the building regulations should have been addressed long ago as the impact of this not being so has been ongoing for some considerable time. This matter requires more urgent action.
Isle of Wight

No - Support the measures, but the timescales are ridiculously long. Why would it take nearly 25 years to identify and implement minimum standards, and another 15 years to update building regs?
West Sussex

No - I support the propositions themselves but the years these are being proposed for are perhaps too far in the future and should be brought closer, however I appreciate the government is hardly the most proactive when it comes to these things, especially when it relates to things impacting the environment
Hampshire

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?



Just over three quarters agreed with the approach to continue using temporary water restrictions during droughts (**77%**).

Customers in Kent and East Sussex were the most likely to be in support of this (90% and 92% respectively).

Key themes behind comments – if needed and justified then temporary restrictions are acceptable but only if coupled with interventions / action from Southern to fix leaks etc.

Total Sample Base = 102

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?



Yes - It makes sense to apply when necessary, but this must be coupled with evidence that water leakage is being sufficiently addressed at or around the same time
East Sussex

Yes - If there is not enough water then it is only fair that users should be approached to help and reduce their consumption
Kent

Yes - I do - but only in severe droughts. But if that is so, then your company needs to ensure leaks are stopped ASAP. Earlier in the year, we were on a hosepipe ban, but a water leak was left all weekend without any intervention from yourselves.
Isle of Wight

Yes - If they need to be in place then yes. If the restrictions are to meet targets then no.
West Sussex

Yes - It makes sense, and my perception is that the vast majority of people can see the need to conserve water during dry periods. Getting on and fixing the leaks would help though - How much water is this wasting during drought periods, when you are asking people to not water their gardens?
Hampshire

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?



No - Definitely not when you are talking about NEUB's because you have included plants in this. That is absolutely crazy and certainly will add to the climate and extinction agenda.
East Sussex

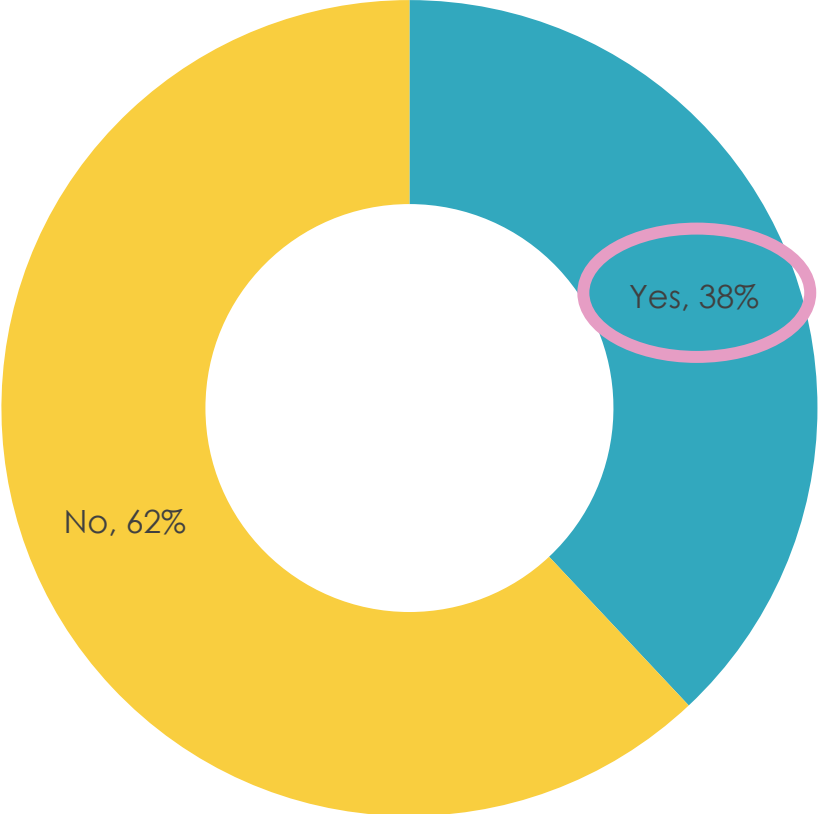
No - Whilst essential in drought situations at present it would preferable if water companies could spread resources between utility suppliers to restrict the need for temporary bans.
Kent

No - Whilst tackling drought is important - how can anyone trust you to act impartially, transparently and with accountability - given your very poor track record, frequent fines, misrepresentation of vital data, pressure of shareholders etc..?
Isle of Wight

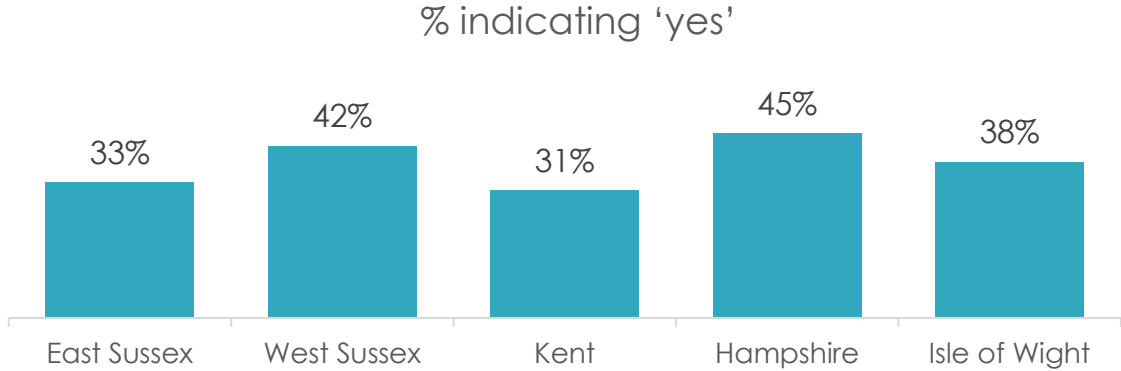
No - I don't believe the burden should be on the individual - we are in this position because of a lack of investment and failure to stop leaks.
West Sussex

No - I pay my bills so should have access to water as I wish
Hampshire

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?



Total Sample Base = 102



Just over a third of customers surveyed had comments about the size of the new reservoir (**38%**).

Customers in West Sussex and Hampshire were the most likely to say that they had comments on the size of the new reservoir (42% and 45% respectively) whilst customers in East Sussex and Kent were the least likely to have comments (33% and 31% respectively).

Key themes behind comments – important to be mindful of the environment and local area when considering the size and location - must not be detrimental to the environment / local communities. There are those who thought it should be as big as possible to be future proof whilst others wondered whether a number of smaller ones might be better.



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?



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

East Sussex

Yes - Personally I would support the reservoir being as large as can reasonably be accommodated without undue harm to the environment.

West Sussex

Yes - Should consider more smaller service reservoirs to reduce pumping costs and provide more resilience

Hampshire

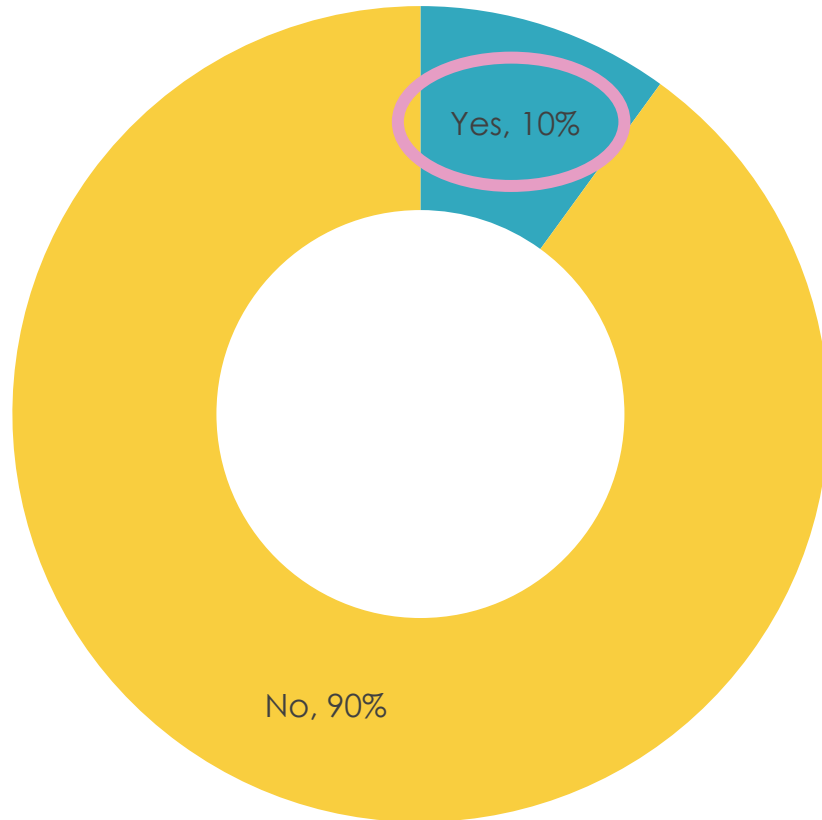
Yes - The size needs to take into consideration both the area it needs to service and environmental impact and try to balance those to out equally.

Kent

Yes - The creation of a reservoir clearly is a major undertaking. It has to happen in the right place but could be very positive for the environment. I am not really sure about the size of the reservoir and how that is calculated, presumably based on estimated capacity and finding a suitable location. It looks as though you have a location in mind at Havant Thicket, which is an area of woodland and grassland located NE of Havant, close to conurbations of human habitation. Presumably you have carried out local consultation, as this will affect the existing community and their access to a natural area. A reservoir would presumably have a leisure offer as well as benefits to wildlife? I viisted a large reservoir in Australia that supplied drinking water in the Brisbane area, it was a successful parkland/leisure area with an area for swimming. I also visited lakes in S France that were similar in their leisure offer.

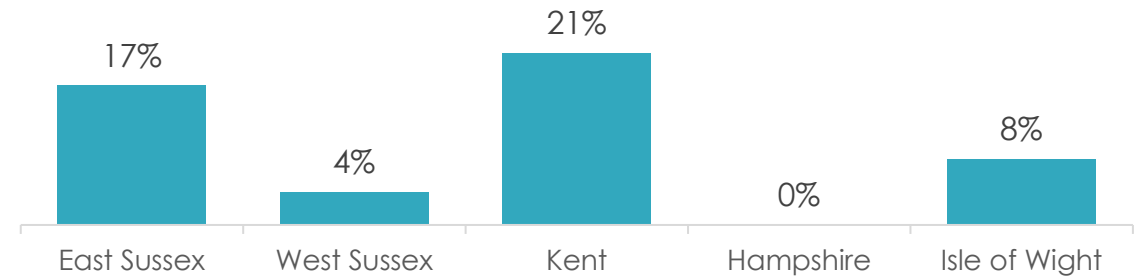
Isle of Wight

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? (See section seven in our technical document for more information)



Total Sample Base = 102

% indicating 'yes'



10% indicated that their position on the size of the reservoir changed based on the impact it could have on the size of the water recycling plant needed at Havant Thicket. It was customers in Kent who were more likely to have an opinion on this 21%. In comparison no customers in Hampshire had any comment to make.

Key themes behind comments – Many comments thought both were important therefore optimising both would make sense and could be necessary for safeguarding future supplies.

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? (See section seven in our technical document for more information)



Yes - Well of course, it depends on the size of the recycling plant but it's a much needed way to go
West Sussex

Yes - I think the latter should be a priority
Kent

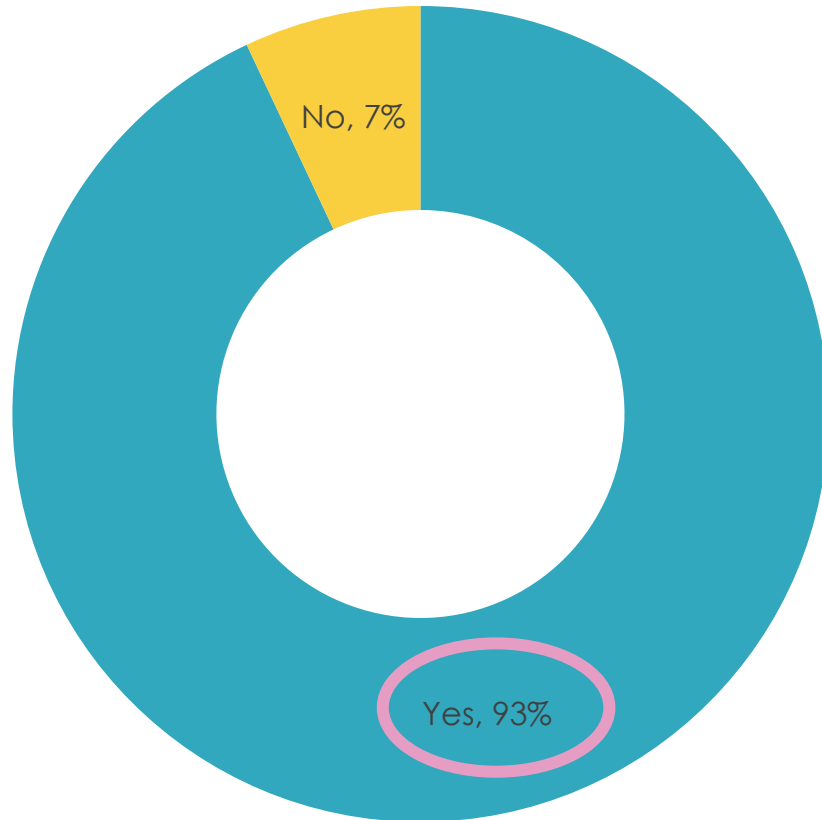
Yes - I think planning for the worst case scenario makes the most sense. Making use of both a reservoir and a desalination plant and alternative water recycling is probably best for long term.
Kent

Yes - Of course there is a balance between one course and another. Given SW poor track record - are they the right people to make such balanced decisions?
Isle of Wight

Yes - I think both are very important and a size should be created that benefits both aspects of the plan. A good middle ground
Kent

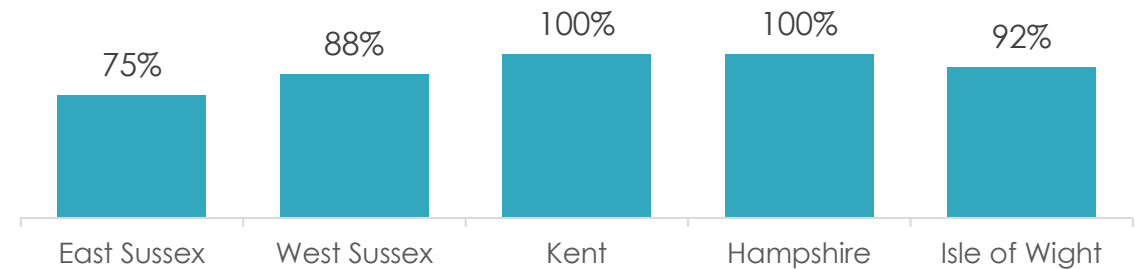
Yes - We need water to live and therefore as our population grows we need to invest in new infrastructure to provide this.
Kent

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?



Total Sample Base = 102

% indicating 'yes'



There was widespread support for the strategy to develop new pipelines that will transfer water into the Southern Water supply area. **93%** agreed with this approach.

100% of customers in Kent and Hampshire supported this strategy whilst in East Sussex there was more likely to be customers who did not support this approach (25%).

Key themes behind comments – This approach just makes sense, more joined up working is required, surprised it doesn't happen already.

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?



Yes - This question would be unnecessary if the water industry wasn't fragmented - see previous comments on a nationalised water industry.

East Sussex

Yes - Having a collective and collaborative approach to managing water resources with neighbouring water companies makes total sense and I'm surprised more of this isn't already in place

Hampshire

No - Maybe this is a good solution - but maybe this is just papering over the cracks. Who knows? If we could trust SW and others to do the right thing - but we can't. The recent fines are just the tip of an enormous iceberg of poor performance, sewage discharge and general incompetence and cover up.

Isle of Wight

Yes - The water network should be more joined up and should work together to provide sustainable, affordable and reliable water sources for all.

West Sussex

No - I'm concerned this will be extremely disruptive, expensive and impact the natural environment negatively

East Sussex

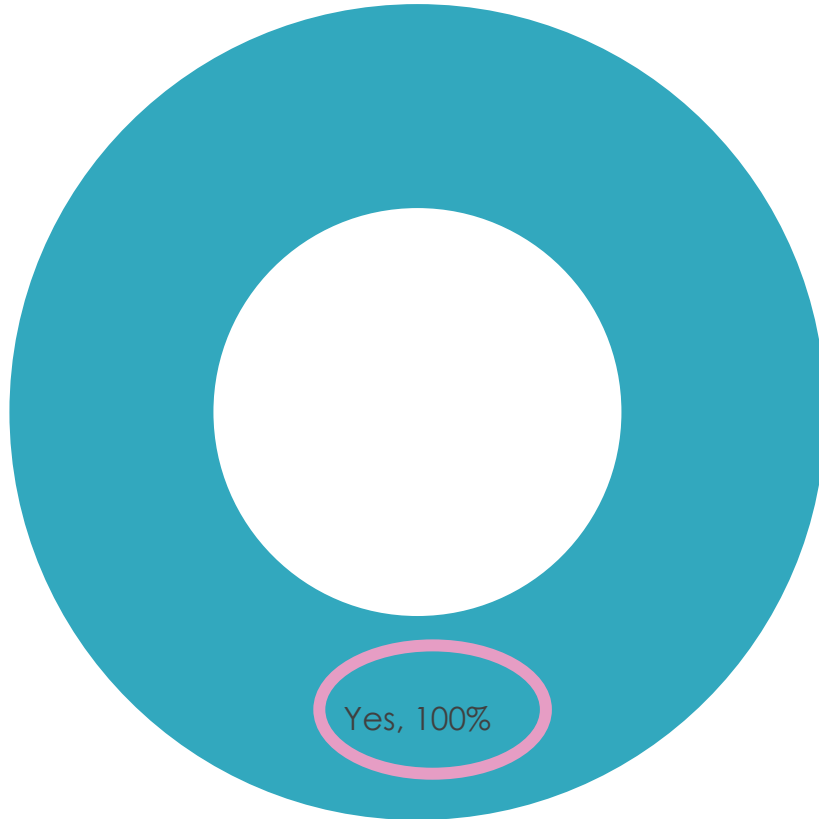
Yes - I have always thought that some form of National Grid for water is essential, and hopefully the policy can engage with all U.K. water companies to secure a better supply

Kent

Yes - Fully support water networks as it essential that water can be distributed. This is probably one of the reasons so much water is lost which could be stored by transfer to other areas. Better late than never.

Isle of Wight

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



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.

Key themes behind comments – For most this is simply a no brainer, it seems obvious, happens elsewhere in the world – why isn't it happening here already here? Some felt it was almost criminal that we use drinking water to flush toilets with etc. However, there is concerns for the environmental impact and hope that this is being considered.

Total Sample Base = 102

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



Yes - Anything to recycle water safely should be investigated and if viable promoted greatly
East Sussex

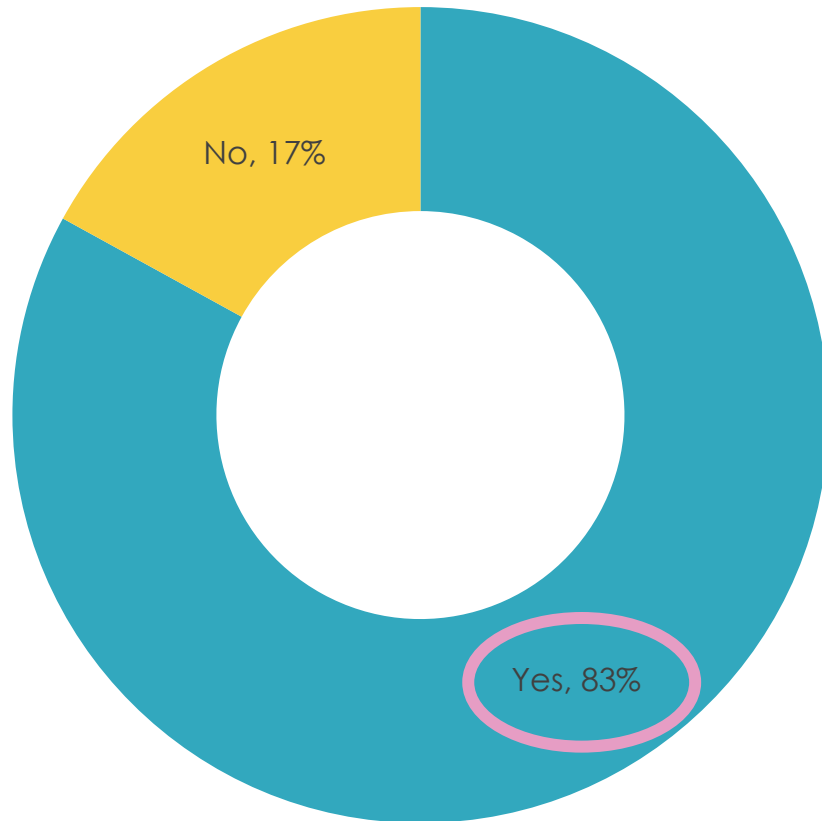
Yes - There is only a finite amount of water going through our systems. We cannot increase the amount of water in our entire system. Abstracting water from the rivers etc have negative environmental impacts. Therefore, water recycling will be crucial in the future as demand increases.
Hampshire

Yes - I was impressed by your suggestions on this subject and think that it is a very useful resource, albeit costly in terms of carbon emissions
Kent

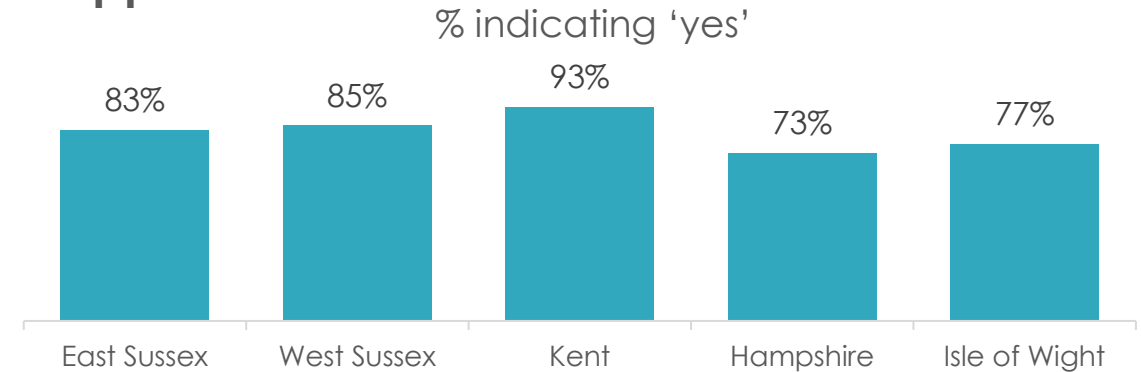
Yes - But only in carefully selected areas . I am still a bit concerned about the process of recycling and the impact on the environment both aesthetic and industrial
West Sussex

Yes - 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.
Isle of Wight

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?



Total Sample Base = 102



83% of customers agreed that Southern should use desalination to provide additional water supplies.

Customers in Kent were most in support of this (93%) whilst customers in Hampshire showed the least support (73%) – however, the differences are not statistically significant.

Again not significant but those aged 45-54 were less likely to say yes they agreed with this (72%).

Key themes behind comments – Used successfully elsewhere in the world, all alternatives should be considered, lots of coastline so makes sense, environmental impact needs to be considered, shouldn't be to the detriment of marine life and green energy should be used to power it.

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?



Yes - If absolutely necessary. However, such plants can be environmentally damaging so careful choice of location and a robust environmental impact assessment are absolute requirements.

East Sussex

Yes - I'm a big believer in this! As a large majority of Southern Water have coastline communities this in theory should be considered a natural step!

Kent

Yes - Desalination is an effective system used around the world where water sources are scarce.

Isle of Wight

No - We have enough water in the UK to more than satisfy perceived need. A National Water Grid would be a much more sustainable option. Desalination is a heavy energy consuming activity and produces a bi-product that would be difficult to deal with. Unless the plant could be linked to sustainable energy sources and only used when other demand is satisfied might convince me, but not otherwise.

Hampshire

Yes - Yes and this should be done sooner than 2040. We have so much salt water by the coast. it makes sense to use it

West Sussex

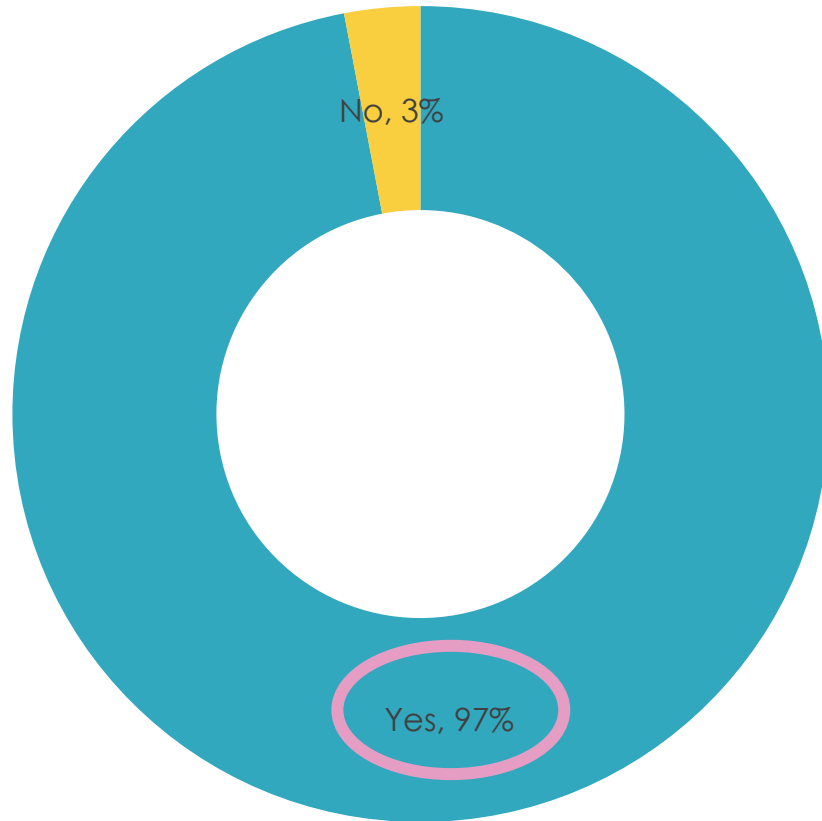
Yes - Yes we need to explore the alternatives and utilise green energy sources to do so

Hampshire

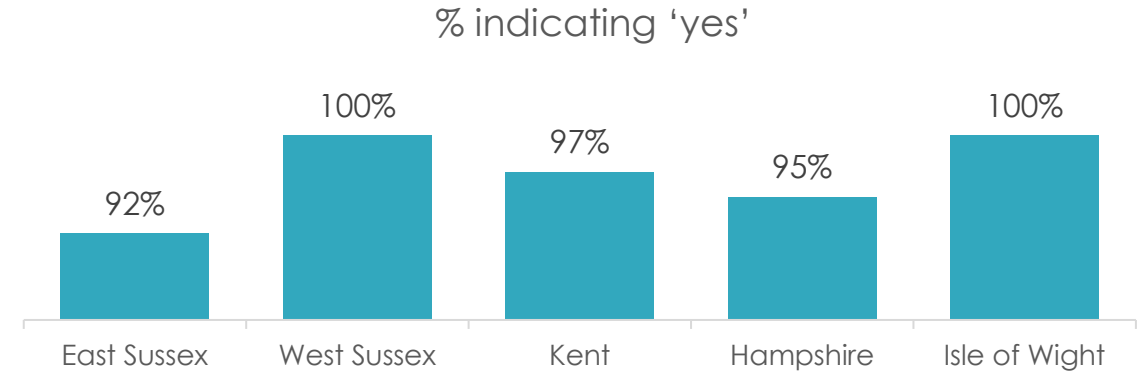
No - Desalination plants as they currently work have a high energy consumption and environmental concerns, and their source of energy is mainly from fossil fuels. So alternative methods/solutions are required. Research and new technologies that can improve current available desalination methods (such as evaporation-based desalination plants) need to be explored.

East Sussex

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?



Total Sample Base = 102



Again this was another highly supported area. **97%** were in support of Southern investigating further to establish whether a new reservoir to store water in West Sussex could provide a new source for the area.

Positively 100% of those living in West Sussex were in support of further investigations in this area along with 100% of those living on the Isle of Wight.

Key themes behind comments – More water storage is thought to be needed and reservoirs can have community benefits so this seems to be a good thing to investigate. However, cost and environmental impact needs to be considered.

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?



Yes - So much of what falls for the sky is wasted. Creating new reservoirs is important and they can be created sympathetically for the environment and create recreational facilities. I grew up in North Wales; look what they've done with reservoirs!

East Sussex

Yes - A new reservoir would be effective but I can assume there will be a huge impact to a community and environment. I would back investigation.

Kent

Yes - Reservoirs seem to provide good options for water storage, provided there other other benefits to people and the environment and they are sited sensitively.

Isle of Wight

No - New reservoirs are extremely costly and take too long to build. They can destroy the natural environment and potentially displace people. There isn't enough space for new large reservoirs. More sustainable, less costly and less disruptive measures should be explored and implemented before building new reservoirs. Introducing nature-based solutions, such as creating an area of wetland along the edges of existing reservoirs, would lessen the impact of drought and reduce the volume of water storage required

East Sussex

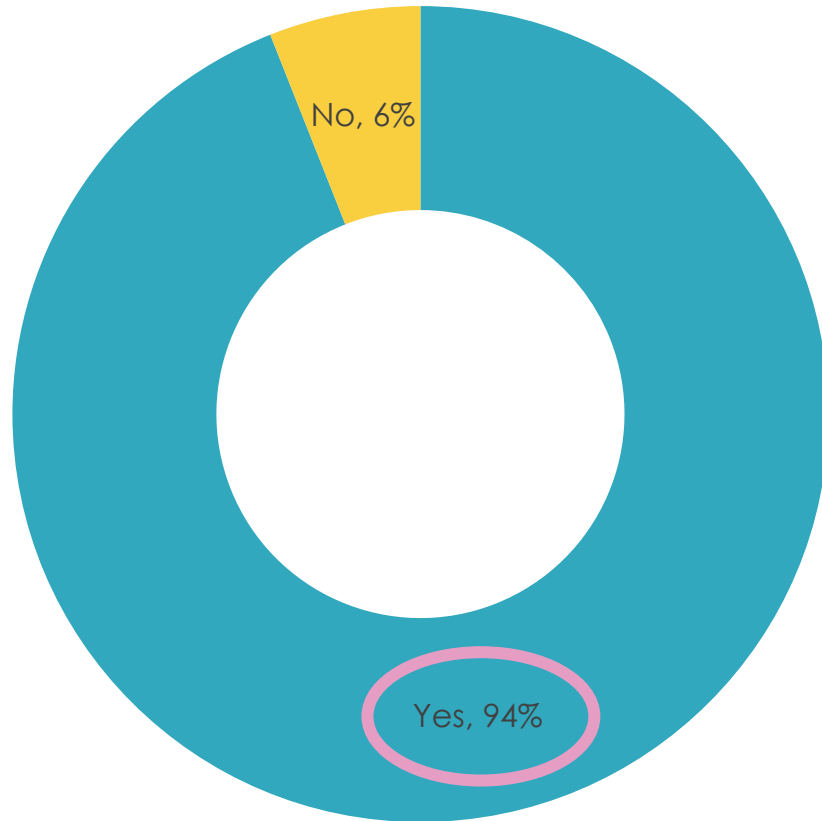
Yes - It's probably essential. A growing population, even allowing for educated customers using less, will still result in I crease overall demand

West Sussex

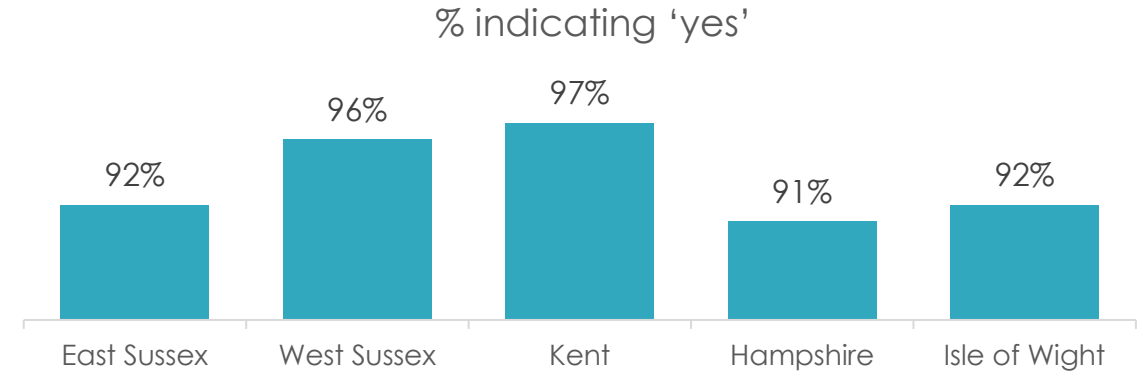
Yes - Whilst not in my area, I would support this wherever it was proposed.

Hampshire

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?



Total Sample Base = 102



94% of customers were in support of Southern looking at water recycling 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.

Customers in Kent showed the most support for this with 97%.

Key themes behind comments – With support for water recycling having somewhere to store it is obviously important as long as it isn't to the detriment of the environment. For those who did not support the idea it was largely due to concerns over abstraction and river health being impacted.

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?



Yes - As long as the residence time in rivers is sufficient, the natural environment generally does a good job of cleaning up discharges (although care must be taken to ensure no significant environmental damage is done on first release).

East Sussex

Yes - Seems like a great idea, the more recycling we do the better

West Sussex

Yes - These options should be explored but not too the detriment of the quality of water in these bodies

Hampshire

Yes - There is little point in recycling water if we are not going to store it and reuse it.

Kent

No - Abstraction is costly and impacts the natural environment. River and wetland habitats may be damaged, leading to the loss of habitat for aquatic animals, plants and insects.

East Sussex

No - I'd be more concerned about the impact of these practices on local biodiversity in water sources such as lakes and historically these things are not taken into account when it comes to large companies launching projects like this as efficiency and profit always come first

Hampshire

Yes - I think any practical recycling options should be examined

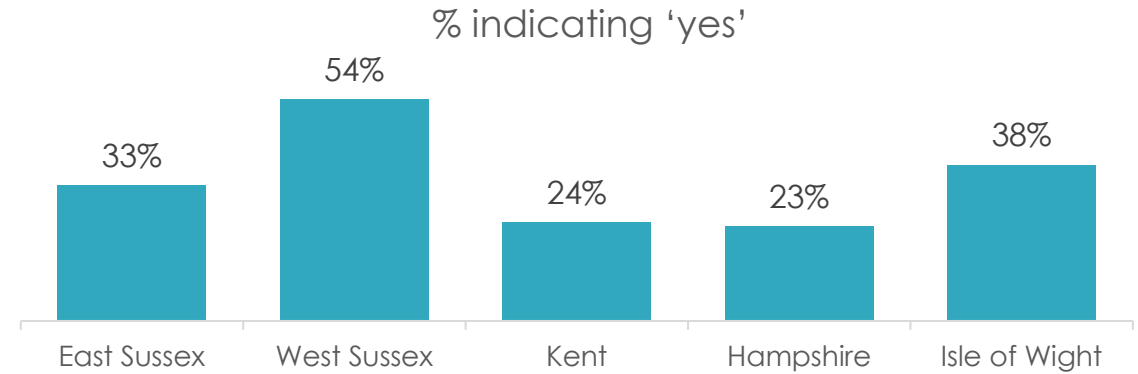
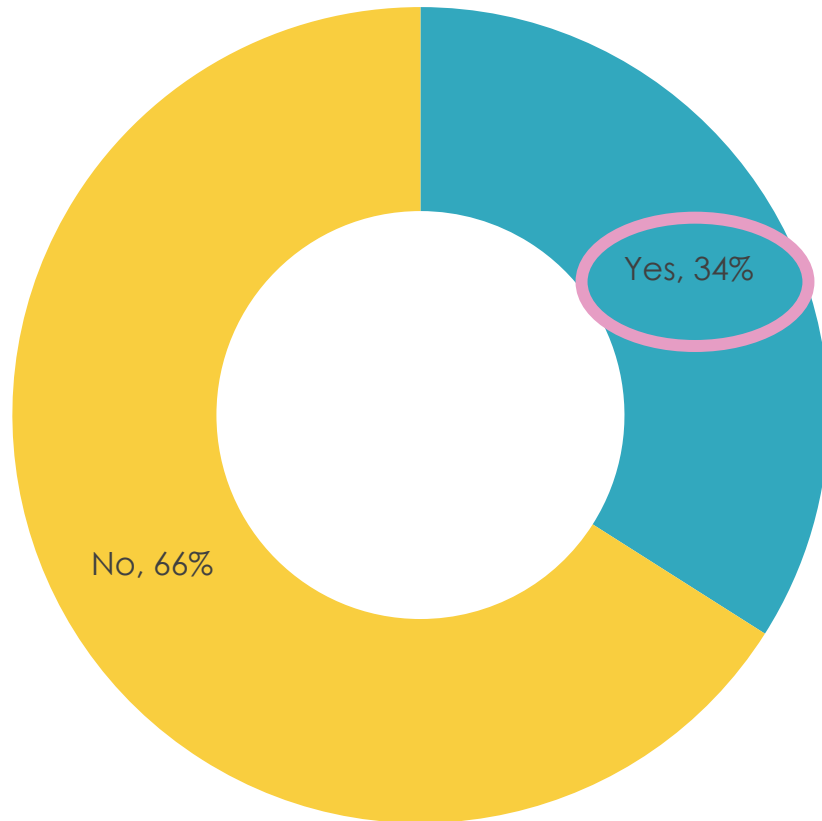
Isle of Wight

No - This sounds very intensive and over-complicated!

Rivers should be protected from interference as it may upset Flora/Fauna associated with it

Kent

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



34% had additional comments to make on the schemes proposed. Customers in West Sussex were the most likely to have additional comments on the schemes proposed.

Key themes behind comments – Comments were varied but included the need for more education on water usage / conservation, plans not being ambitious enough – timescales are too far off in the future - more needs to be happening now, a need for more working with agriculture and industry and more use of nature based solutions.

Total Sample Base = 102

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



Yes - I didn't see much or any mention of reusing rain water or grey water. Also improving sewage treatment plans to reduce waste water. More education and awareness is required on the part of government and water companies for any significant improvements to occur for sustainable water supply that reduces the effect on the planet, wildlife and people.

East Sussex

Yes - I am very interested in the management of the nitrate and working with farmers/agriculture which may be a huge pollutant of waterways.

Kent

Yes - 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.

Hampshire

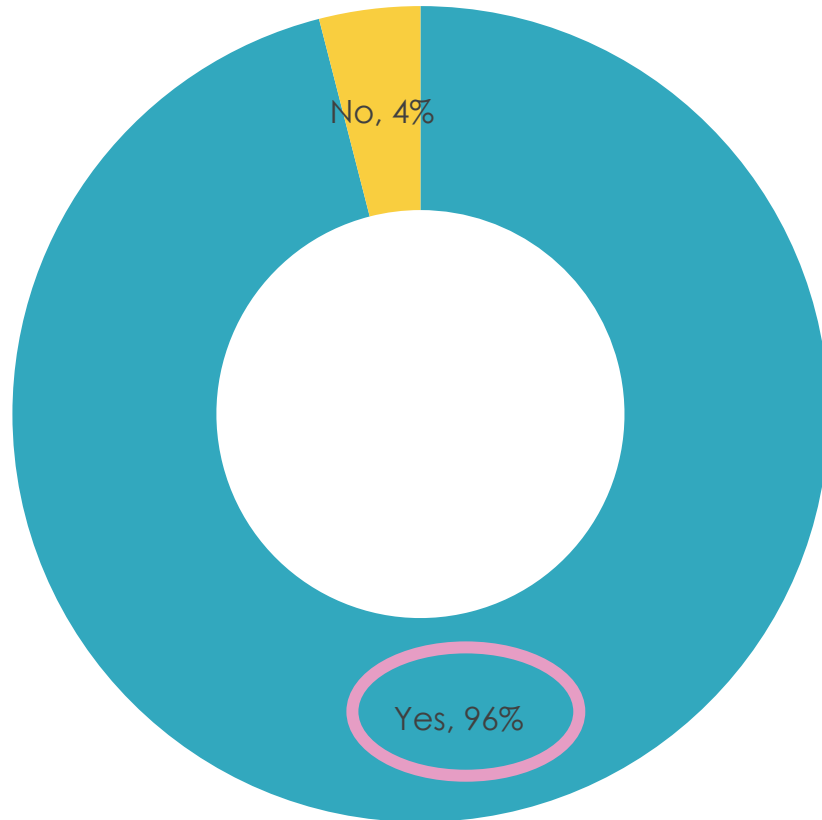
Yes - I would have liked to have seen more nature based schemes

Isle of Wight

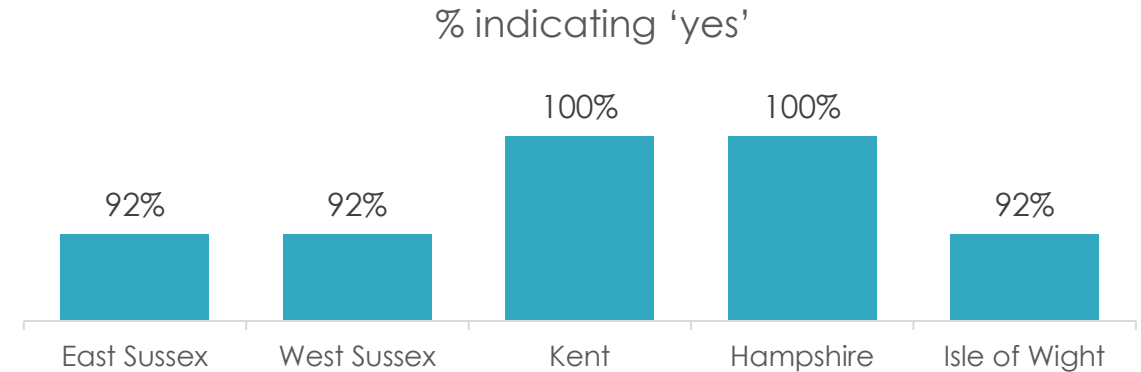
Yes - Just what I mentioned earlier about driving an education shot to customers about paying less if you use less. We're only one household but being careful has become a healthy habit

West Sussex

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?



Total Sample Base = 102



There was near unanimous agreement that Southern should develop their pipeline network so they can move more water between their supply areas and share supplies with neighbouring water companies. In total **96%** of those surveyed agreed with this.

100% of customers in Kent and Hampshire were in support of this.

Key themes behind comments – Again this was thought to make sense / be a no brainer / be common sense, a National Water Grid is a good idea where some areas are stressed and others have an abundance of water but needs to ensure that there is consideration given to the environment when implementing this.

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?



Yes - If research and evidence identifies this as a viable option and it can be done safely and have minimal impact on the natural environment. Other methods to share water companies need to be explored too

East Sussex

Yes - I also believe that this should be spread across the country with all neighbouring companies connecting to each other, so that in future water could be moved between all parts of the country when needed, by passing from neighbouring company to neighbouring company, affectively creating a country wide network.

Kent

Yes - Absolutely. A key factor in any future plans and important to be on a short time scale. Should have been done years ago and is one of the prime reasons why water shortages can occur whilst other areas are passing water out to sea.

Isle of Wight

No - I don't believe you are in a position to share water when you are already saying there is a lack and significant leakage. It makes no sense.

East Sussex

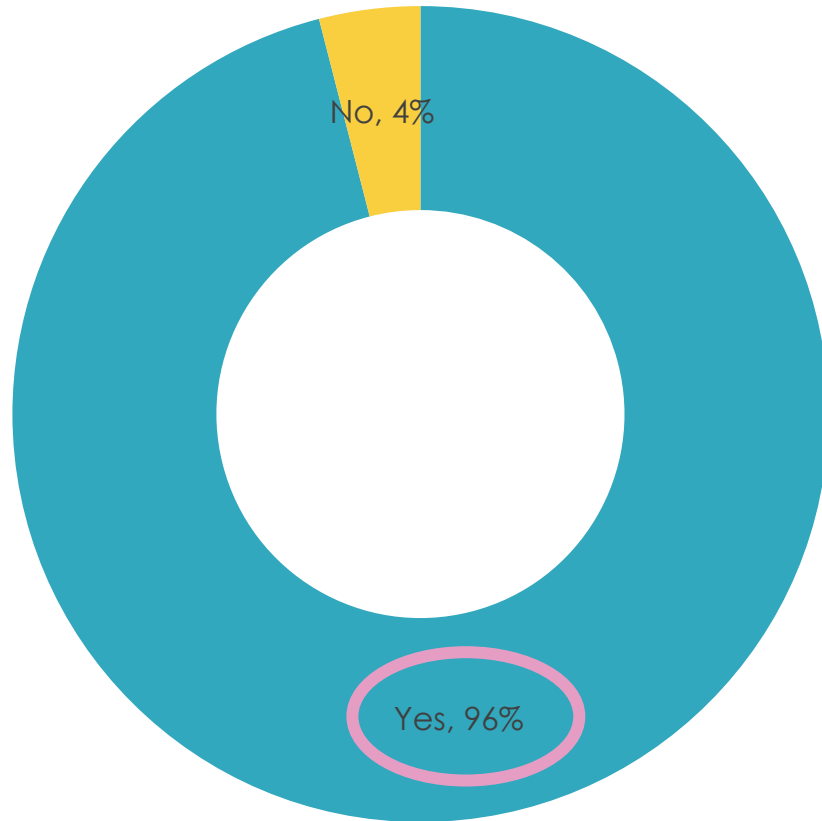
Yes - We all need access to clean water - we shouldn't ever take that for granted, either way (us receiving, or us sharing)

West Sussex

Yes - Population growth is not always where water supplies are so being able to move excess water to higher demand areas is better than recycling water or using a desalination plant

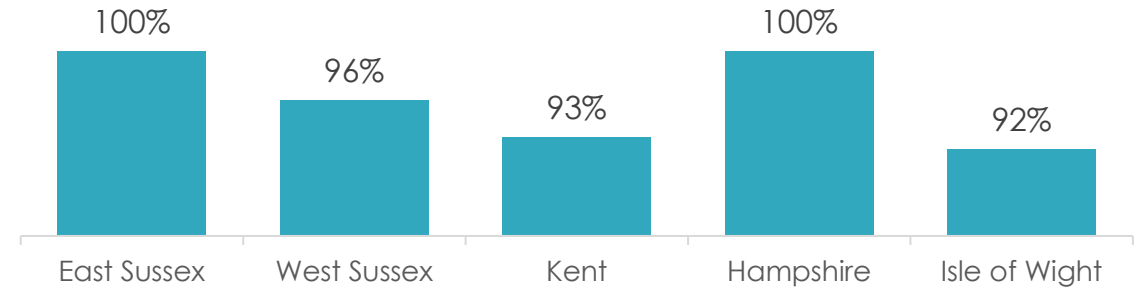
Hampshire

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?



Total Sample Base = 102

% indicating 'yes'



Similarly there was near unanimous support for Southern to proactively use catchment and nature-based solutions. **96%** supported this ambition.

Customers in East Sussex and Hampshire were most in support of this (100%).

Key themes behind comments – Seen to be very positive, anything that works with the environment and is sustainable is a good thing, solutions like this have multiple benefits, more of this should be done and sooner.

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?



Yes - I support anything that works towards sustainability and a better outcome for the environment
East Sussex

Yes - Yes, reed beds, sewage treatment plants, as many nature-based solutions as possible. Reservoirs and their surrounding areas can often become great areas of natural interest as well as presenting leisure opportunities.

Kent

Yes - Yes, of course, but you should be doing more to bring this forward.
Isle of Wight

Yes - THIS IS ABSOLUTELY KEY. We are seeing the degradation of nature in the supply of water and the treatment of waste water. In addition the run-off 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.

West Sussex

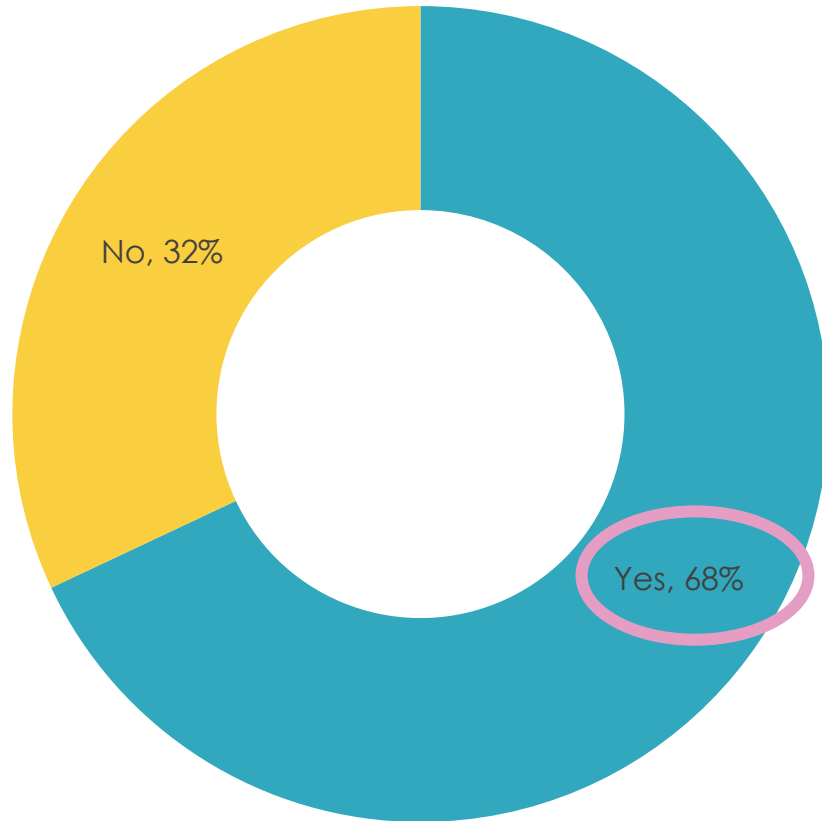
Yes - I believe these sort of schemes will have the added benefit of reducing flooding which is another negative aspect of climate change.

Hampshire

No - You should be investing not paying shareholder big bonuses. The increase to bills by 2035-40 is too big. We will have an aged population and they might not be able to pay this huge increase

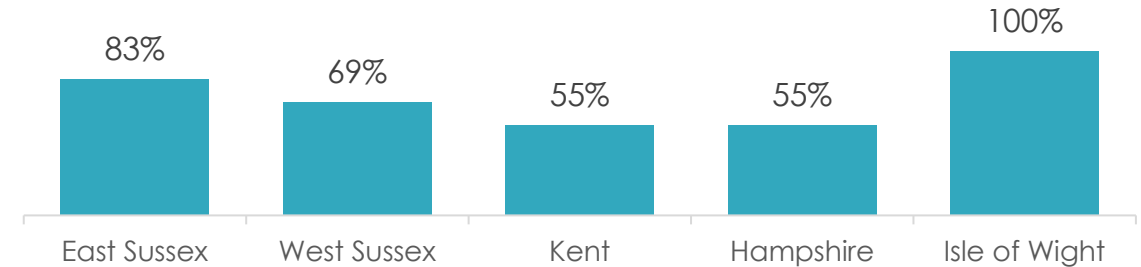
Kent

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



Total Sample Base = 102

% indicating 'yes'



Two thirds of customers felt that those who benefit from a healthy water environment should contribute to the cost of delivering these solutions (**68%**).

100% of customers on the Isle of Wight agreed with this whereas those living in Kent and Hampshire were less likely to agree with this (55% each respectively).

Key themes behind comments – Although this makes sense some weren't sure exactly who this might be and how it would be calculated. Working together / collaboration with those who may be part of the problem was thought to be logical. 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.

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



Yes - By "others" I read industry and farming, so yes of course, especially if they're partly responsible for pollution and wastage.

East Sussex

Yes - Everyone who is benefitting should be contributing to costs. How that is calculated and charged is the big question

Kent

Yes - Collaboration of all invested parties to contribute and ensure the most cost effective solutions should be encouraged.

Isle of Wight

Yes - yes, but don't they already? This needs to be better explained.

West Sussex

No - That question can be interpreted in a couple of ways. If those that benefit is referring to local residents, then absolutely not. If it refers to local businesses, then perhaps, although let's not forget that Southern Water is ultimately responsible for this.

Hampshire

Yes - I think everyone should contribute to conserving our natural water resource

Hampshire

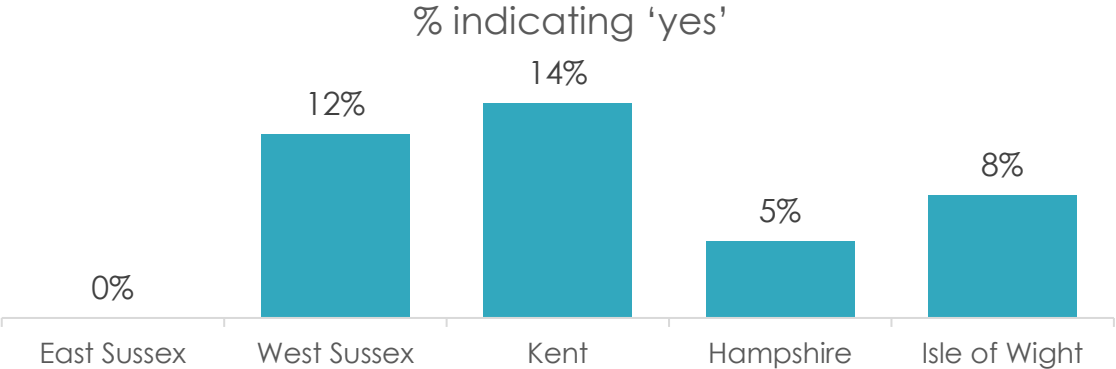
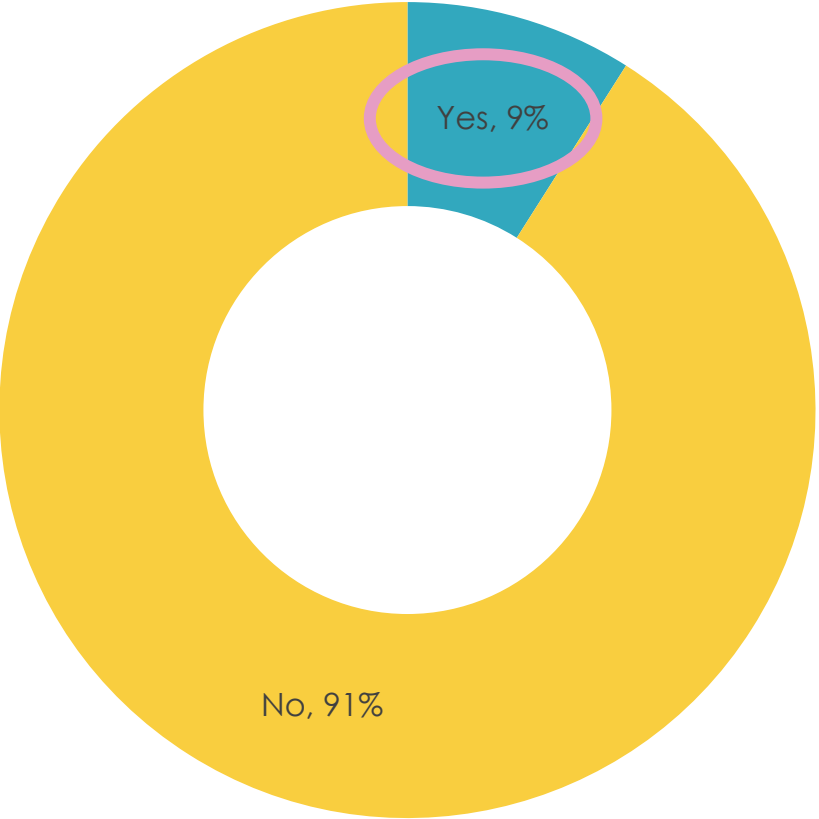
No - Water companies make enough profit to invest in future development. If you expect others to invest, what will you give them in return? The same benefits that your CEO enjoys?

East Sussex

No - Who are 'others' in this context? Customers? Back door justification for increasing bills while jacking up dividends?

Kent

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%).

Total Sample Base = 102

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?



Yes - Work with local organisations to ensure everything is done sustainably
West Sussex

Yes - Yes talk to all water supplies and come up with a solution to help all
Kent

Yes - Become more accountable and transparent and then work with other organisations.
Isle of Wight

Yes - You need to be open to better relationships with the not so obvious ie fine turf clubs
West Sussex

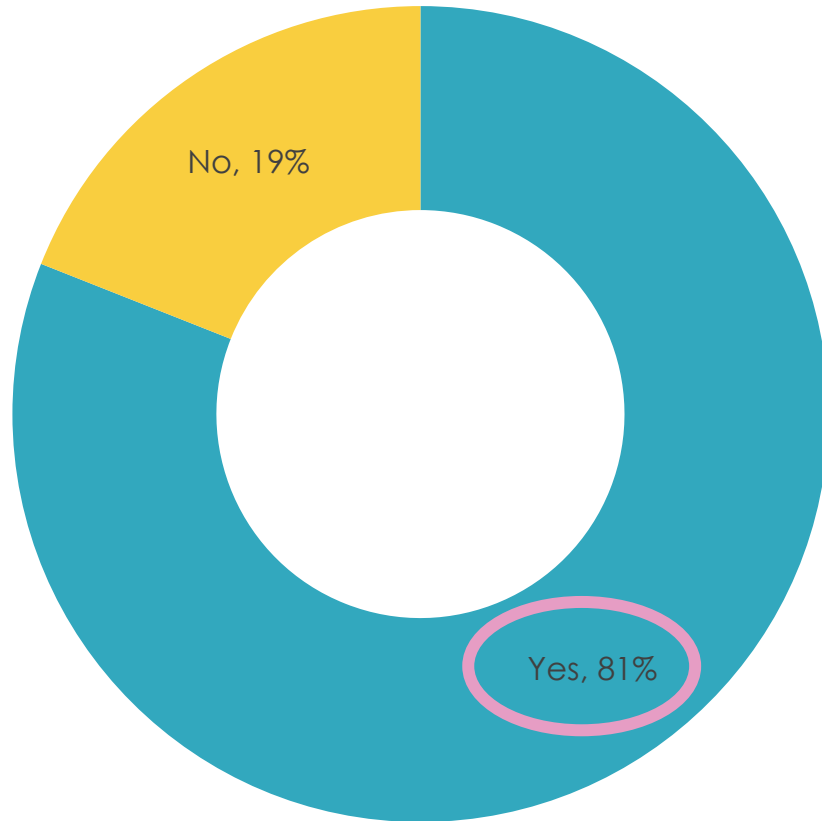
Yes - I work for the charity Wonderseekers based in the south downs national park and we are in a mission to inspire young people to protect and heal our planet.

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.

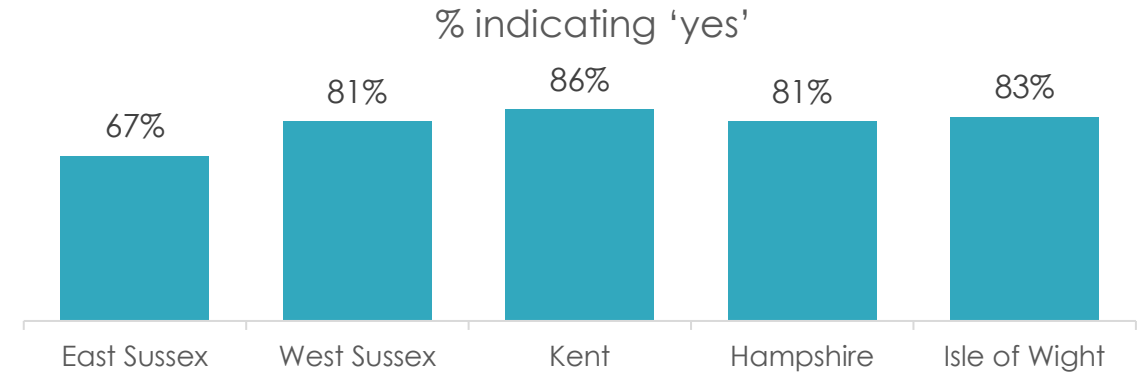
Hampshire

Yes - As in many areas of associated working a multi agency meeting is required to ensure that any plans are best delivered. Common sense.
Kent

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?



Total Sample Base = 102



81% agreed that the plan struck the right balance between demand and supply solutions.

Customers in West Sussex and Kent were the most likely to think that the plan struck the right balance (81% and 86% respectively) whilst customers in East Sussex were the most likely to disagree that it struck the right balance (67%).

Key themes behind comments – 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).

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?



Yes - i think the plan takes in the various factors and comes up with an adequate solution from both sides
East Sussex

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.
Kent

Yes - But they have to work, not just on paper but in action too.
Isle of Wight

No - I worry that it relies heavily on water from other areas. This means other companies can hold us hostage to their prices. Surely we should be focussing on moderating our own use and better storage of water in the area.
Kent

No - Am not in favour of reducing demand. This just masks innovation and inefficiencies.
Hampshire

No - I don't think it goes far enough in taking measures to reduce demand and I think there is potential for much better water usage in a much shorter time frame.
Isle of Wight

Yes - Ideally, demand would be reduced to the point where expansion of supply isn't required...as this is unlikely to be possible due to population growth, then the proposal offers a reasonable balance.
West Sussex

Yes - Sounds good, but could be implemented quicker.
Hampshire

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
East Sussex



turquoise

Conclusions &
Recommendations

Conclusions

For many customers it was good to see that Southern Water have a WRMP and are thinking about securing supplies for the future (particularly given the Summer of 2022 and the water restrictions that were imposed). There are those that feel Southern Water are the experts and therefore if this is what they say needs to happen then so be it. However, for others the distinct lack of trust they have in Southern makes them more questioning of the plans and the intentions. A high proportion do not feel Southern have customers best interests at heart nor do they care for the local environment therefore they have viewed the plan with greater scepticism and a more critical eye.

That being said the majority support the plan and believe it strikes the right balance between demand and supply solutions **(81%)**.

However, it is clear that there is a feeling amongst customers that some targets and timescales are not stretching / ambitious enough with many believing that there needs to be more urgency to get things addressed sooner as time is not on our side with regards to climate change.

- 2040 / 2050 / 2060 is simply seen to be far in the future, change needs to happen now.
- Leakage targets are a key bone of contention – seeing water leaks really irks customers and they want to actually see Southern doing more to tackle this sooner (particularly when the plan details a desire to get demand down – if customers are expected to play their part they want to see Southern doing the same). Leaks should be more than halved and the timescale should be quicker in most customers opinions.

There are high levels of support (in excess of 90%) for the following parts of the plan:-

- 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%)**.

Conclusions

With many elements of the plan a key consideration for customers was around the impact on the environment. Customers want plans to be implemented with as little negative impact as possible. Whether it be where new reservoirs are sited, what happens to the desalination byproduct and the use of green energy to power a desalination plant these are elements and considerations that customers want Southern to have. Also given customer perceptions of Southern's track record with regards the environment customers will be particularly observant of these factors. As such Southern must be mindful of this with any planning.

A more 'linked up' water network is desired with greater collaboration between water companies and the ability to share resources as and when needed. The majority are in favour of a nationalized water industry therefore it is not surprising that improved pipelines that enable this is supported. Regardless investment in improved infrastructure was thought to be necessary particularly when it came to leaks as previously mentioned.

Most customers are willing to play their part in getting demand down but feel that Southern most support and educate the population to help make this happen. Southern must work to put initiatives in place to help hit the more ambitious target (which the majority support).

Now customers simply want Southern to get on with it. Many don't understand why it has taken so long to start thinking about tackling some of the issues and why it will still take so long into the future to hit some of the targets – don't delay any further!

Key Findings.



Key Feedback from this Audience

Targets need to be more ambitious and timescales need to be sooner particularly when it comes to leakage.

Developing new water supplies is essential as is the ability to store more water.

Greater education and support is needed to help customers reduce their water usage if aiming for the more ambitious target of 100 litres per day (which the majority think Southern should push for).

Water recycling is highly supported and seen to be a logical part of the plan.

Implications on the back of reviewing the plan

Customers want to see action – with these plans set out they will want to see things happen as a result. They expect positive change and improvements and investment to secure future supplies. However, many do not have faith that Southern will do what they say they will.

Customers have high expectations with regards to taking care of the environment and low perceptions of Southern as a custodian of the environment. Work is needed to prove customers wrong.

Key Themes for this audience.

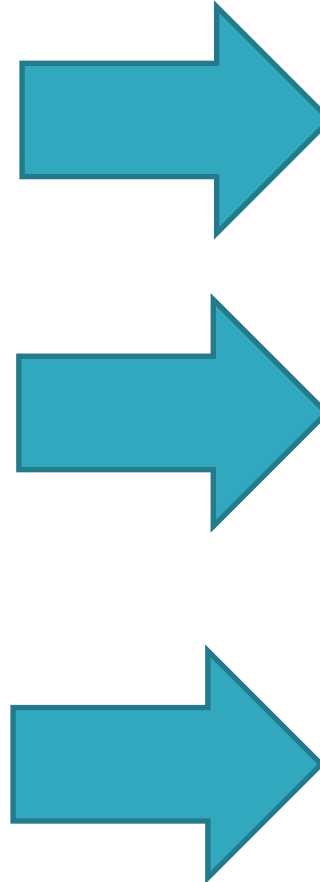


Recommendations

Consider making some of the targets more ambitious and bringing forward some of the timescales, some customers feel there is an element of shutting the stable door after the horse has bolted – stretched water resources aren't a surprise considering the population increases and climate change therefore the problem must be tackled quickly.

Future proof solutions as much as possible whilst being mindful of the impact on the environment and local communities. Having options is important so a reservoir that is bigger than is needed right now with future scalability along with water recycling options make more sense than relying on one solution entirely.

Many customers are willing to make sacrifices to help get demand down but support and advice must be given with regards to the best way to do this and Southern must demonstrate that they are taking the issue of leaks seriously.



Customers want to see Southern being ambitious with their approach

- Implement water recycling solutions
 - Look at more ways to store water – more reservoirs
 - Working more closely with other water companies to align and share resources
 - Help customers reduce their usage
 - Drastically reduce leakage
 - Use catchment and nature based solutions
- Whilst limiting environmental impact and trying to do things as soon as possible

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