APPENDIX A
PRE-CONSULTATION DETAILS

This Appendix document details the pre-consultation activities and customer research undertaken to inform the development of our draft drought plan. It outlines the stakeholders involved, feedback received, and research conducted to shape the plan's communication and environmental strategies.

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1 PRE-CONSULTATION

1.1 Pre-Consultation Letter

On the 17th December 2024 we emailed a seven page pre-consultation letter to 61 named contacts at the stakeholder organisations listed in Table 1 as well as the individual members of our Independent Challenge Group to ask them for their input in the preparation of the draft drought plan. A copy of this pre-consultation letter is included as Annex 1 to this Appendix.

Figure 1: A copy of this pre-consultation letter is included as Annex 1 to this Appendix.

A wide range of organisations were invited to participate in our draft drought plan pre-consultation. As well as the statutory consultees listed in the Environment Agency, we also contacted other local stakeholders including local councils and authorities, wildlife trusts and catchment partnerships, NAVs, members of our ICG, wholesale retailers, and the other water companies who operate in the South East of England.

Table 1: Organisations invited to participate in our draft drought plan pre-consultation

Regulators / Gov:

• Defra	• Environment Agency
• DWI	• Natural England
• Ofwat	• CC Water

Councils/Authorities:

• Test Valley Borough Council	• Chichester Council	• Hampshire CC
• West Sussex Council	• Fareham BC	• Gosport
• Winchester Council	• East Hants District Council	• Havant Council
• South Downs National Park Authority		

Wildlife Trusts and Catchment Partnerships:

• Wessex Chalk Stream & Rivers Trust	• Sussex Wildlife trust	• Meon Valley Partnership

• Arun & Western Streams Catchment Partnership	• Hampshire & Isle of Wight Wildlife Trust	• East Hants Catchment Partnership
• Test & Itchen Catchment Partnership		

NAVs

• LEEP	• ICOSA	• IWNL

Wholesale retailers:

• ADSM	• Water 2 Business	• Marstons
• Castle Water	• Stonegate Pub Company / BT / John Lewis	• Pennon (South West Water)
• Business Stream	• Water Plus (Severn Trent)	• Whitbread
• Clear Business Water	• TWRC	• Wave
• Everflow Limited	• Water Scan	• Veolia Water Retail
• Pozitive Water Ltd	• Yu Water	• One Business Water Ltd
• Greene King	• Smarta Water	• SES

WRSE and water companies in the South East of England:

Southern Water	SE Water	Thames Water
Affinity Water	WRSE	SES Water

It is noted that this list does not include firefighters or Local Resilience Forums. These will be included for the main consultation of the draft Drought Plan during the spring/summer of 2026.

1.2 Responses Received to the Pre-Consultation Letter

Our pre-consultation letter outlined our proposed approach for the Plan and welcomed any feedback. The following five organisations responded to the pre-consultation letter:

- Environment Agency
- Natural England
- South Downs National Park Authority
- South East Water
- Winchester City Council

Table 2 provides a high-level summary of the issues and topics that were raised by the respondents to our pre-consultation.

Table 2: A summary of pre-consultation responses received and where in the plan these have influenced changes

Respondent	**The feedback covered the following topics** **(which have in turn informed the development of this draft Drought Plan)**	**Where in the dDP these comments have influenced our plan.**
Environment Agency	• Application readiness • Drought permits • Working with New Appointments and Variations (NAVs) companies during a drought • Habitat Regulation Assessment (HRA) and Strategic Environmental Assessment (SEA) • Review of Drought Triggers • Communication plan • Incorporating lessons from the 2022 drought • The role of regional groups	• Section 6.5 • Section 3.2.1 • Section 1.5.2 • Section 3.1.4 • Section 2 and Appendix C • Section 5 • Throughout the plan – notably Sections 1.2.1.3, 3.1, 3.2.1, 3.1.2.3, 5.5 • Section 1.4.3

Natural England	Natural England provided written information on the legislative and policy requirements for the following aspects of the draft Drought Plan:
	
	• Habitats Regulations Assessment (HRA) and Duties to Habitats Sites
	• Strategic Environmental Assessment (SEA)
	  ○ Wildlife and Countryside Act 1981 as amended
	  ○ Natural Environment and Rural Communities Act and Net Gain
	  ○ Environment Act 2021, and the Environmental Improvement Plan 2023
	  ○ Protected landscapes
	  ○ Climate change
	  ○ Species recovery and protected species
	  ○ Marine conservation zones
	• Water Framework Directive
	• UK government environmental targets for the water environment
	  ○ Natural capital and resilient landscapes and seas
		These recommendations were taken into account during the development of the Environmental Reporting for the draft Drought Plan

	○ Connecting people with nature – demand management • Drought planning ○ Order of drought options and levels of service ○ Environmental Assessment reports (EARs) of drought permits and orders	• Sections 2.1.1, 3 and 6, and Appendix D • Section 6.5
South East Water	South East Water wrote to support the continued cooperation at a regional level towards the proposed priority areas of the WRSE Dry Weather Working Group (DWWG). The South East Water response also suggested other potential areas of collaboration including the investigation of 'more before 4' options and a review of drought triggers including the possible development of environmental triggers.	• Section 1.4.3
Winchester City Council	Winchester City Council raised the importance of appropriate communication to vulnerable residents and critical businesses during drought while minimising the impact on the environment. Winchester City council would like to see more detail about how designated sites could be impacted during drought, and what compensatory measures may be required by existing water users across the Portsmouth Water catchment.	Sections 3.1.1, 3.1.2.3, 5.3 and Table 4 Sections 1.3.2, 3.2.1, and 6
South Downs National Park Authority	Commitment to working together.	We will continue to work proactively with the South Downs National Park Authority.

2 PRE-CONSULTATION MEETINGS

We held pre-consultation meetings with the Environment Agency throughout the time that we were updating our drought plan. In these meetings we discussed environmental assessment requirements for our planned drought permits and orders and exploring the Company's Level of Service and environmental drought triggers for WRMP29.

A meeting was held with AWNI (previously Leaf) to discuss consistency in the Levels of Service between our drought plan and theirs, and communications material we would send out during a drought.

3 CUSTOMER RESEARCH TO SUPPORT PRE-CONSULTATION

As well as our more formal pre-consultation activities to support the development of this draft drought plan, we have commissioned some research to explore the views of our customers and shared in WRSE customer research to gain insight into water users across the South East region.

3.1 Portsmouth Water led customer research

To inform the formation of this draft plan, and in advance of the formal public consultation stage of the process, we have worked with Customer Insight specialists Blue Marble to explore our customers' views around drought.

Blue Marble Research has included:

- focus groups and 5 in depth interviews with our Customer Advisory Panel
- A survey of 392 panellists from 'Water Talk': Our customer panel

This customer panel survey took place between 26th September and 9th October 2025. All the panellists were Portsmouth Water customers and bill payers. One of the aims of the survey was to provide us with a greater understanding of customer support for drought plan measures.

Although the Customer Advisory Panel research was focused on customer's long-term preferences beyond the time frame of this Drought plan, it did indicate that customers are able to identify positive implications of smart metering, such as identifying leaks in the system, helping reduce water wastage, and reducing the likelihood of water use restrictions during droughts. Some Customers felt that a lack of water restrictions during periods of drought is counterproductive and would rather see some restrictions during very hot weather to preserve water resources.

The reported data from the survey was weighted to match the known demographic profile of Portsmouth Water customers (age and gender). As the customer panel is self-selecting, rather than purposively sampled to be representative, panellists may be more engaged with the water sector and knowledgeable about Portsmouth Water than customers in general.

As part of Wave 9, which reported in October 2025, Customers selected multiple choice answers to a series of questions about how concerned about drought they are, their awareness about how and why to save water, their support for a wider range of supply and demand options, and how they would prefer to be communicated with in a drought.

Key findings that have been reflected in the communications strategy for this draft Drought Plan:

- Most customers say they would only start adapting their water usage in the event of a drought, if that drought was occurring within the Portsmouth region. In the event of a drought, customers want to receive direct communications (such as emails).
- Emails, text messages, and postal communications are preferred.

We have used the findings of this research to inform our drought communications plan. The Water Talk – Wave 9 Report findings that focus on the Drought Plan are included as Annex 2 of this Appendix.

3.2 WRSE Regional Customer Research

Our drought communications strategy, set out in Appendix H, has been significantly influenced by some research commissioned jointly as part of WRSE aiming to understand and explore the views of customers from all six WRSE companies regarding their priorities and preferences for actions that could be taken (both supply and demand side) in severe drought conditions. These are defined as those conditions that meet level 3b drought conditions, as determined by the Environment Agency.

Underpinning this aim, there were three specific research objectives:

1. To understand the impact of severe drought on customers
2. To develop a framework for communication to customers across drought levels
3. To ascertain actions taken beyond existing drought plans that would be acceptable to customers

The research consisted of phases of research that built upon the evidence generated in the previous phases.

- 24 online workshop groups. screening was undertaken to ensure that all respondents had at least shared responsibility for paying the water bill in their household. Sampling was undertaken to ensure representation within weightable limits.
- In-depth interviews were held with nine vulnerable customers and their representatives to understand the nuances of the potential impact of severe drought upon customers with long-term health conditions and/or learning disabilities.
- 12 customers were asked to record their thoughts, emotions, and any practical difficulties / enablers they experienced whilst role-playing the experience of living in severe drought, using an app that enables uploading videos, images, voice notes and written notes from their phones (Indeemo). Following the role-play exercise, each participant took part in an online / telephone in-depth interview to allow full reflection on the impact of the severe drought on their day-to-day lives.
- a 20-minute online customer survey of 2,400 household customers aiming to develop a comprehensive understanding of customer preferences, and
  a co-creation workshop between customers and water companies to develop recommendations for future Drought Plans.

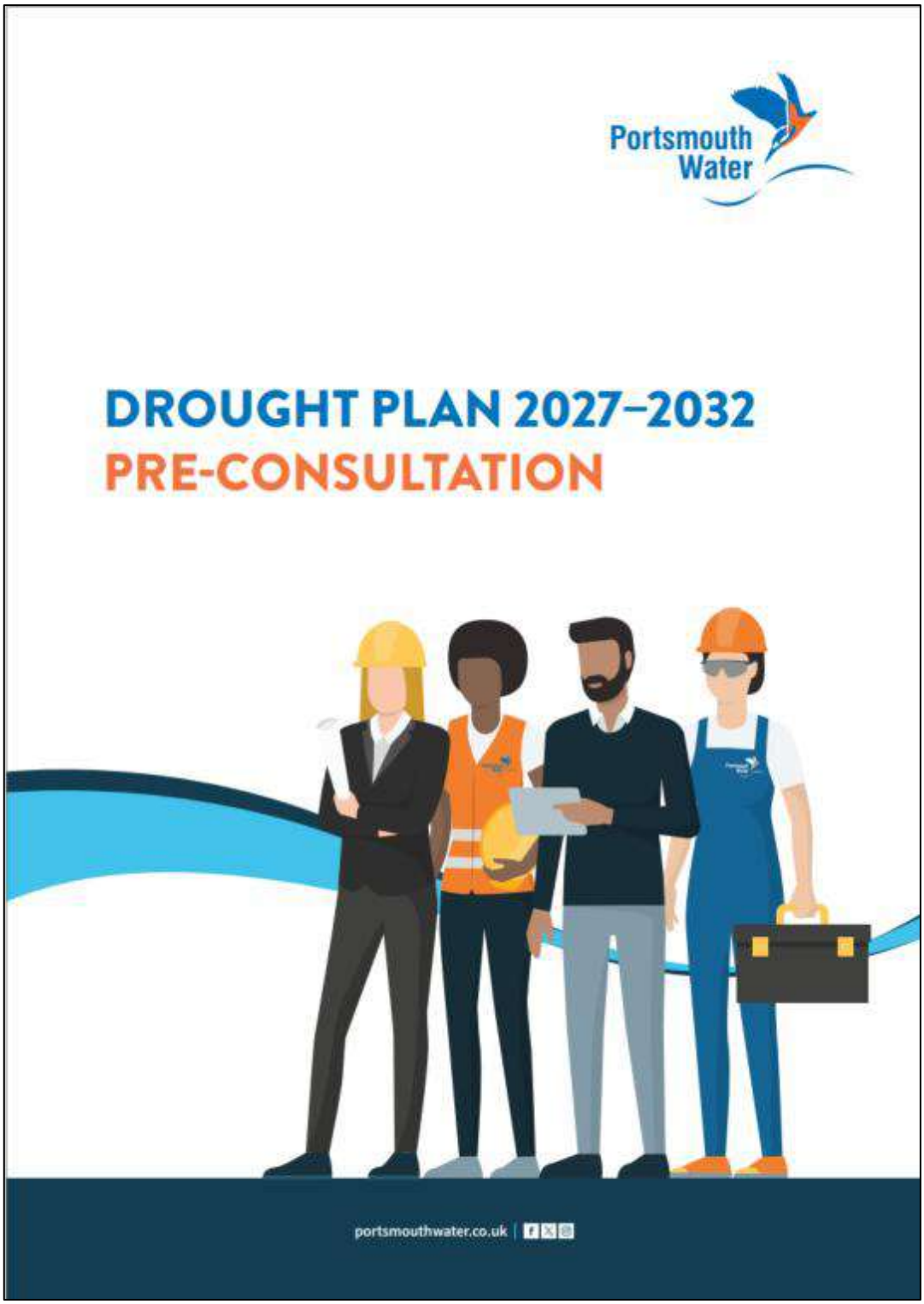
A notable finding of this research is that customers are concerned about severe drought but the awareness of personal water use and the willingness to adopt high-effort behaviour were limited.

Key findings have been used to influence the communications strategy for this draft Drought Plan, including:

- The acceptability and prioritisation of specific supply and demand-side actions
- Consideration of the requirements of vulnerable customers and how they could be supported during drought.
- The messages to be used during a drought, and how these would be most effectively disseminated. Customers highlighted the importance of clarity and simplicity in messaging.

The Executive Summary of this WRSE Drought Plan Research, Research Report (February 2026) is included as Annex 3 to this Appendix.

APPENDIX A, ANNEX 1: PRE-CONSULTATION LETTER



INTRODUCTION TO OUR PRE-CONSULTATION

At Portsmouth Water we supply drinking water to over 740,000 customers and over 10,000 businesses. We need to ensure that we can continue to do so whilst tackling the growing challenges of protecting our environment in the face of climate change and an increasing population.

We have recently published on our website our Water Resource Management Plan 2024, which details our strategy to ensure we can do that for the next 50 years. However, we now need to refresh our existing operational plans to ensure we can protect supplies in the face of a severe drought. And we are seeking your views on how we might do that.

It is expected that droughts will become more common in the future and we need to be prepared for this so that we can all act together when the time comes, ensuring the best interest of our communities and the environment are always kept in mind. We update and prepare our Drought plan at least every five years, and our current plan, which was published in April 2022, can be found here: Portsmouth Water Drought Plan.

The Drought Plan outlines the stepped approach we take to ensure water supplies are maintained for as long as possible in the event that prolonged dry weather threatens supplies. This includes when and for how long we use interventions like temporary use bans (Hosepipe bans) and Drought permits which would have a big impact on our customers or the environment.

We are now in the process of preparing our next Drought Plan for the period 2027-2032.

This document outlines our proposed approach and whilst we will have a formal public consultation on our draft plan next year, we would greatly welcome your feedback as part of a pre-consultation discussion to help shape our plan before that consultation begins. It outlines:

- The guidance and legislation that will be used to develop our plan
- What to expect in our next Drought Plan
- A link to the feedback questionnaire

Please can you read the information on the next pages and use the link at the end to fill out an on line form with your opinions on behalf of your organisation. It should take no more than 10 minutes and will help us to update our draft plan ahead of the wider public consultation taking place in Autumn 2025 (on which we will also ask your opinion).

WE WOULD LIKE TO HEAR YOUR VIEWS AND VALUE YOUR OPINION.

Information on our next drought plan and feedback questions

1. GUIDANCE AND LEGISLATION

To update our plan, we will be using the following guidance and sources of information:

- The Environment Agency's Water Company Drought Plan guidelines and associated documents, including the UKWIR Drought Code of Practice and the updated National Drought Response Framework
- Government expectations letter to water companies for the 2027 drought plans
- Insight and guidance from collaborative working groups and interested parties – National Drought Group, Regional Groups including WRSE, New Appointments and Variations (NAVs), local resilience forums and Retailers
- The Regional Water Resource Groups 'statement of intent' which sets out the role they will take in a drought
- Our learnings from recent dry weather events including the summer of 2022
- Our recently published Water Resources Management Plan 2024 and Business Plan 2024

Is there any other guidance or information we should be considering as we develop our next drought plan?

2. WHAT WILL BE UPDATED FOR OUR NEXT DROUGHT PLAN

Lessons Learnt from 2022

During the summer of 2022, we experienced a hot, dry summer which meant that our groundwater levels dropped below our first Drought Trigger level. This prompted the formation of our Drought Management Group and our Level 1 drought management actions. Fortunately, our groundwater levels rose before the need to implement any water use restrictions. This was not the case for neighbouring companies that did have to implement Temporary Use Bans (hosepipe bans) for their customers.

After that dry weather event, we carried out a full lessons-learnt review which highlighted key areas which we will investigate for our next Drought Plan including drought options, early warning triggers and enhanced communications.

Was there anything that Portsmouth Water could have done differently in 2022 to support you?

Drought triggers review

Our current drought triggers are based on our groundwater levels. During the development of our current Drought Plan, we explored whether Standard Precipitation Index (SPI) indices could be used to help us understand the different stages of an emerging drought by looking at rainfall deficit, and how well that links with the response of our groundwater resources.

Ultimately we did not use SPI as formal drought triggers, but rather used it to provide additional early warning, prior to crossing the formal groundwater triggers and they also provided a useful link to the 'exceptional shortage of rain' requirement necessary for drought order/permits.

For this next Drought Plan, we will revisit this assessment to confirm whether any recent updates in legislation and/or data would result in the use of additional triggers alongside our groundwater triggers.

We will also be working closely alongside Southern Water as they update their triggers to understand whether there any impacts on our supply to customers and the mitigation measures that would be required.

Are there any further trigger indicators you feel we should be considering?

Drought options review

We will be assessing whether there are any required changes to the drought options driven by the new WRMP24. In addition, the 2022 lessons learnt has highlighted the importance of a Drought Options review including supply-side (such as the temporary re-commissioning of sites) and development of additional demand side options that would be implemented before the Emergency Plan (once groundwater trigger level 4 is reached). These are called 'More Before 4' options which would ensure that we can maintain our levels of service.

We will explore what is available to us as More Before 4 options both at a company and regional level and be able to use examples from other countries (e.g. South Africa) where they have experience with extreme levels of drought.

Are there any more before 4 options you can suggest, or caution against/rule out based on your experience or understanding of regulations?

Environmental assessments review

We will be undertaking a full assessment of our application readiness at our Drought Permit site, taking into consideration any updates/changes to the environmental assessments required. Additionally, we will be working closely with the Regulators to ensure that any legislative or policy changes to the Drought Plans SEA/HRA are implemented.

Are there any particular environmental issues that you feel we should be addressing as we develop our drought plan?

Communications during a drought

Through our recent introduction of the Kraken customer relationship management system, We have significantly expanded our Marketing and Communications capability. This provides us with a great opportunity to enhance our existing drought communications plan.

In the event of a drought, we will be engaging both locally and regionally to inform customers of the situation, launch actions and co-ordinate with other businesses.

Are there any particular channels, locations or styles of communication that your organisation recommends or prefers to receive important information through?

3. FEEDBACK

Please use this link to use our Microsoft feedback questionnaire:
PLEASE CLICK LINK HERE

Alternatively, feel free to send an email to **water.resources@portsmouthwater.co.uk** by 31 January 2025 with the subject line: Drought Plan Pre-Consultation and your response to the following questions:

- Your name
- Your organisation (if applicable)
- Are you the best contact from your organisation to stay in touch with during the drought planning process? If not, please supply the name and email address of the relevant contact
- What are the most important issues to you/your organisation during drought?
- Were you/your organisation impacted during the summer of 2022 drought? If so, how?
- Was there anything that Portsmouth Water could have done differently in 2022 to support you? If so, how?
- What emergency plan/s does your organisation have, if any, which would impact upon or be impacted by our Drought Plan?
- How would you rate our current drought plan? (from 1 to 5, 5 being the best)
- Are there any particular environmental issues that you feel we should be addressing as we develop our drought plan?
- Are there any further trigger indicators you feel we should be considering?
- Are there any More Before 4 options you can suggest, or caution against/rule out based on your experience or understanding of regulations?
- Are there any particular channels, locations or styles of communication that your organisation recommends or prefers to receive important information through?
- Do you have any further comments or questions for us?
- Would you like us to contact you to arrange a further discussion regarding the development of our next Drought Plan?

WE LOOK FORWARD TO RECEIVING ANY FEEDBACK AND WORKING WITH YOU THROUGHOUT THE DROUGHT PLANNING PROCESS.

APPENDIX A, ANNEX 2: WATER TALK – WAVE 9 FINDINGS REPORT

Portsmouth Water

BLUE MARBLE

Water Talk – Wave 9 Report

Drought Plan & Brand Health

October 2025

Key findings

1. **Perceptions of affordability have reached their lowest levels to date.** While this does appear to be largely driven by perceptions of total water and wastewater bills, many customers are concerned about the cost of their water bill.

2. **Customers are increasingly aware of the need to save water and reduce their usage.** Almost three quarters say they understand why they need to save water.

3. **The majority of customers are concerned about the issue of supply and demand.** Most express support for additional investment in reducing leaks and building a new reservoir. However, fewer (just over half) support water recycling.

4. **Most customers say they would only start adapting their water usage in the event of a drought, if that drought was occurring within the Portsmouth region.** In the event of a drought, customers want to receive direct communications (such as emails).

5. **Most customers perceive Portsmouth Water positively, seeing the organisation as local, efficient, and reliable.** However, there is some evidence that customers simply see the organisation as their water supplier, with no strong brand associations in any direction.

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Overview

Report includes the findings of wave 9 of the customer panel Water Talk survey

Photo by Jeremiah Lawrence on Unsplash

Method & Sample:

Water Talk Wave 9 of the customer panel survey Water Talk (previously called Barometer) took place between **26th September and 9th October 2025.**

- A total of **392** Water Talk panellists took part.
- All were Portsmouth Water **bill payers.**

Research objectives:

- This wave aimed to:
  - Monitor water bill affordability and Key Performance Indicators
  - Provide a greater understanding of customer support for drought plan measures
  - Give a detailed update on brand health

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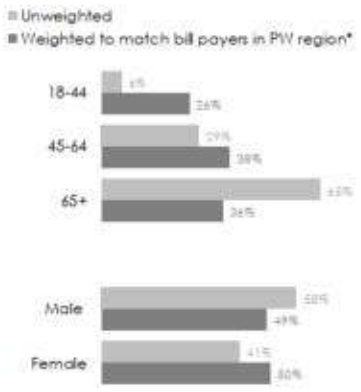
Sample detail

The data contained in this report is from customers who have joined Water Talk, the Portsmouth Water Customer Panel.

- The total number of responses (392) is robust for quantitative analysis (e.g. comparing sub-groups).
  - It is however substantially lower than the sample achieved for the previous wave, indicating a panel refresh is essential prior to the next wave.
- The data in this report is **weighted** to match the known demographic profile of Portsmouth Water customers (age & gender).
- It is important to note that the panel is self-selecting, rather than purposively sampled to be representative.
  - This means panellists may be more engaged with the water sector & knowledgeable about Portsmouth Water than customers in general.
  - Interpretation of the data must bear this in mind. It should be used in conjunction with other data sources to understand different viewpoints and the wider picture.



* Based on 2021 Census data for the 18+ population of the Portsmouth Water region and nationwide omnibus data on water bill payers

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Water consumption & understanding of water resource

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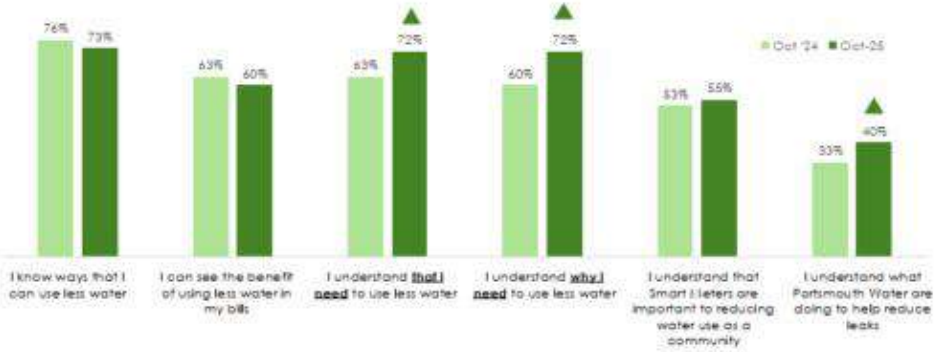
Customers increasingly understand the need to save water

11

On the flipside, customers are less clear on the financial benefits of using less water (albeit this change is not statistically significant)

To what extent do you agree or disagree that…



Q9. To what extent do you agree or disagree with the following statements? Bases - Baseline / Reference
Base: All customer panellists (Wave 8: Oct '24 n=536; Wave 9: Oct '25 n=392)

Significantly higher / lower than previous wave

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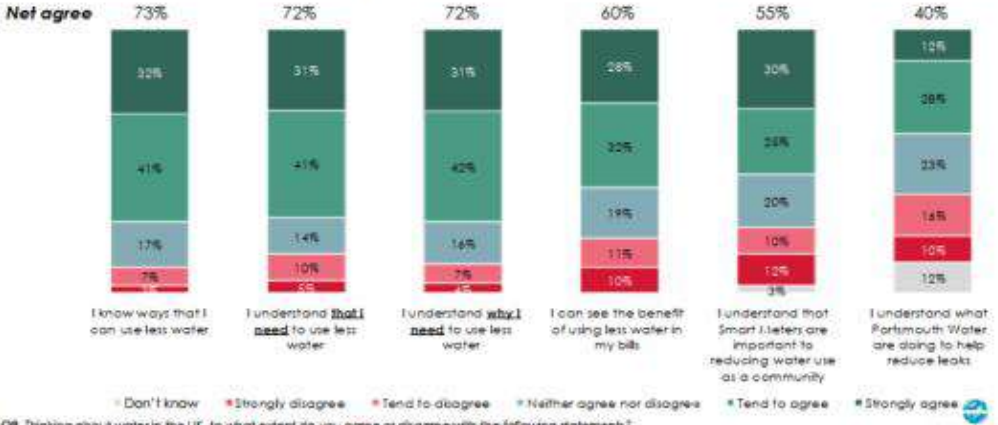
Almost three quarters of customers say they know why they need to save water, and how to do so

12

They have lower understanding of the work Portsmouth Water is doing

To what extent do you agree or disagree that…



Q9. Thinking about water in the UK, to what extent do you agree or disagree with the following statements?
Base: All customer panellists (392)

BLUE MARBLE

Almost 7 in 10 customers understand the region is water stressed, with 3 in 5 understanding why 13

This understanding has increased significantly since this time last year

Understanding of 'water stressed'

Q9. To what extent do you agree or disagree with the following statements? Base: All customer panellists (Wave 8: Oct '24 n=536; Wave 9: Oct '25 n=392)

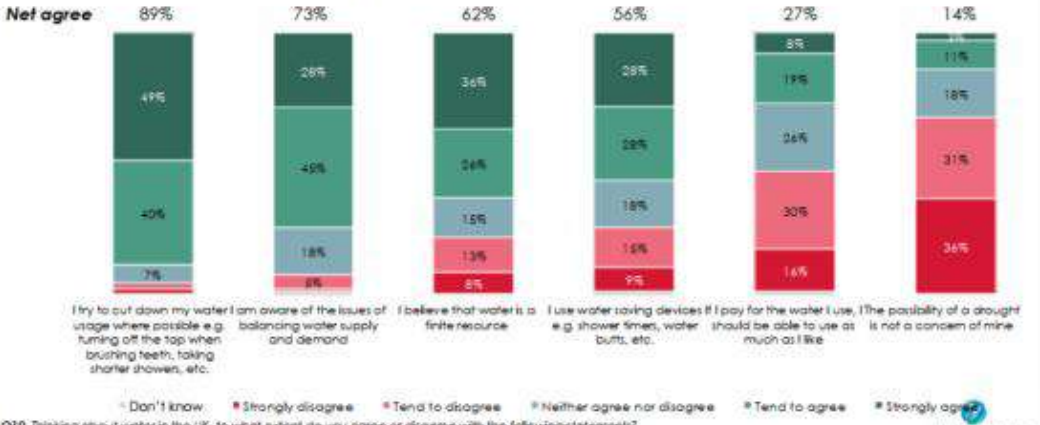
Significantly higher / lower than previous wave

BLUE MARBLE

The majority of customer say they try to cut down their water usage where possible 14

However, only half say they use water saving devices

To what extent do you agree or disagree that…



Q10. Thinking about water in the UK, to what extent do you agree or disagree with the following statements? Base: All customer panellists (392)

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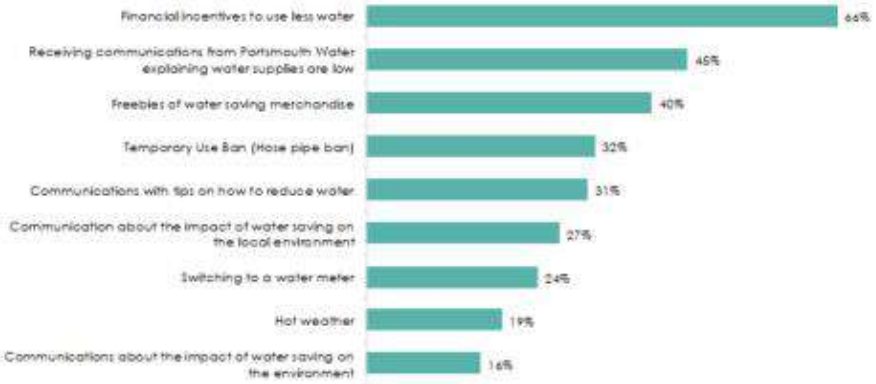
Two thirds of customers would be motivated by financial incentives to use less water

15

Just under half would be motivated by hearing that water supplies are low

What situations, if any, would make you reduce your water use?



Q11. What situations, if any, would make you reduce your water use? Please select from the list below the top three situations that would make you reduce your water usage. Base: All customer panellists (392).

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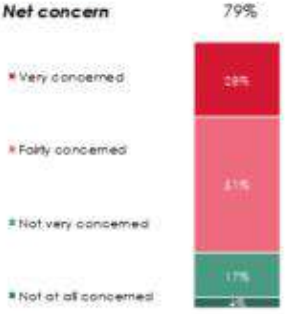
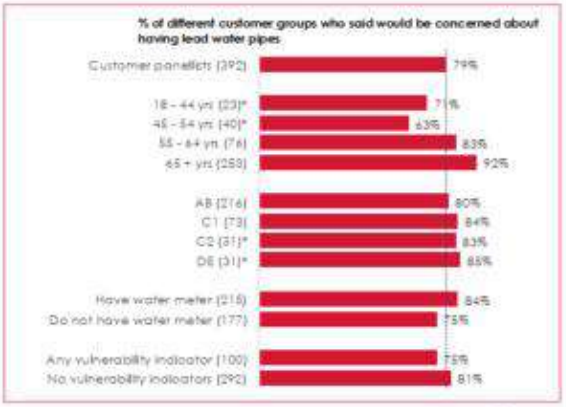
Almost 4 in 5 customers are concerned about balancing water supply and demand

16

Older customers are the most concerned

Concern about issue of balancing water supply and demand





Q12. How concerned are you about the issue of balancing water supply and demand? Base: All customer panellists (392)

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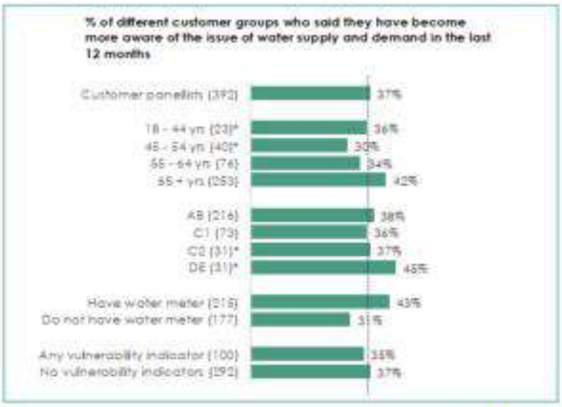
Almost 2 in 5 customers say they are more aware of water supply and demand issues compared to 12 months ago

17

3 in 5 customers say their awareness has not changed. It is likely (based on findings on the next slide) that these customers likely consider themselves to already be sufficiently aware of the issue of water supply and demand

Change in awareness

- I have become more aware of the issue of water supply and demand over the last 12 months
- No change
- I think about the issue of water supply and demand less than 12 months ago
- Don't know



Q13. Have you noticed any change in your awareness of water supply and demand issues over the last 12 months? Base: All customer panellists (392)

AtkinsRéalis - Baseline / Référence

BLUE MARBLE

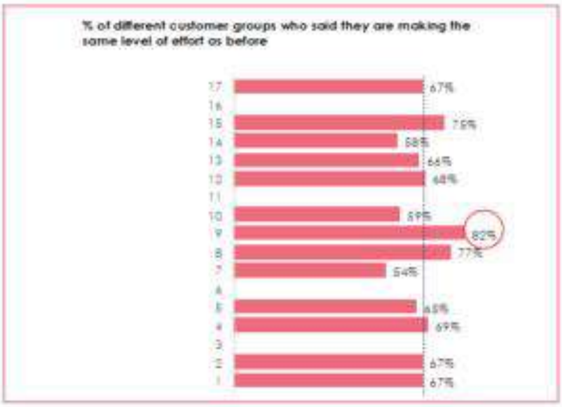
Most customers say they are already making lots of effort to reduce their water use

18

C1 customers are more likely than average to feel they are keeping up high levels of effort

Change in water using behaviour

- I am now making more effort to reduce my water consumption
- I am making the same level of effort as before (I was already making lots of effort and have kept this up)
- I am making the same level of effort as before (I am not motivated to reduce my water consumption)
- I am now making less effort to reduce my water consumption



Q14. Have you noticed any change in your water using behaviour over the last 12 months? Base: All customer panellists (392)

AtkinsRéalis - Baseline / Référence

BLUE MARBLE

Climate change and lower costs are the biggest drivers in recent water saving behaviours

19

Customers are also conscious of recent water shortages around the country

Drivers for positive change in behaviour

1. The weather and climate change (23%)
2. Cost motivations (16%)
3. Perceived water shortages (14%)
4. Having a water meter (12%)

"Worry over the lack of water."

"To try and reduce my bill."

"Many other authorities have introduced hosepipe bans and I know we have had prolonged periods of dry weather with reservoirs shrinking considerably."

Drivers for negative change in behaviour*

1. No perceived shortage in water supply (2 of 4 customers)
2. Weather (1 of 4 customers)
3. Denial of climate change (1 of 4 customers)

"Because we are surrounded by the stuff and there's so many leaks not repaired around."

"Climate change is a load of nonsense. The tolerance in climate change is a natural swing between the planet being a molten fireball and the planet covered in ice a mile thick."

Q14a. You said that you are now making more effort to reduce your water consumption. What has led to this change? Base: Customers who answered Code 1 to Q14 (92). **Q14b.** You said that you are now making less effort to reduce your water consumption. What has led to this change? Base: Customers who answered Code 4 to Q14 (4). *CAUTION: Low base size, treat results as indicative only. Baseline / Reference

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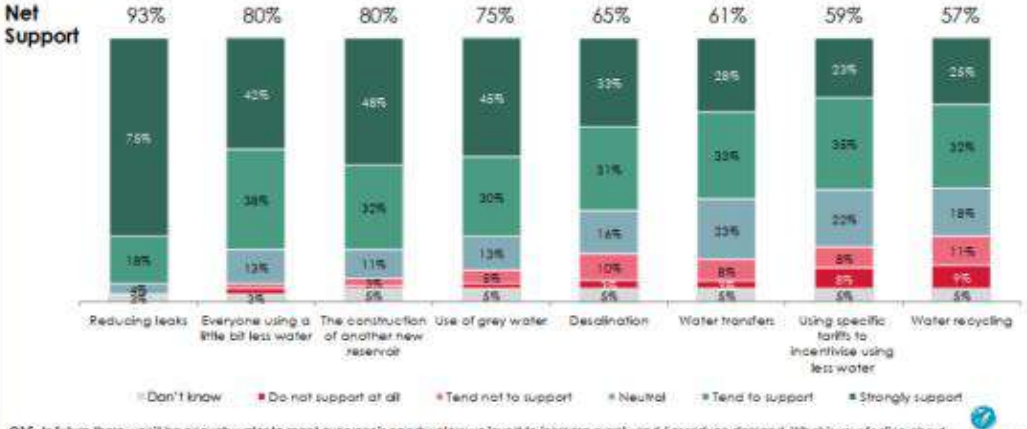
Customers welcome further investment to ensure the security of their water supply

20

At least half support each of the proposed method, with over 9 in 10 supporting reducing leaks

Feelings towards each method:



Q15. In future there won't be enough water to meet everyone's needs, unless we invest to increase supply and / or reduce demand. What is your feeling about using each of the following methods to ensure there is enough water in the region in future? All customer panellists (392)

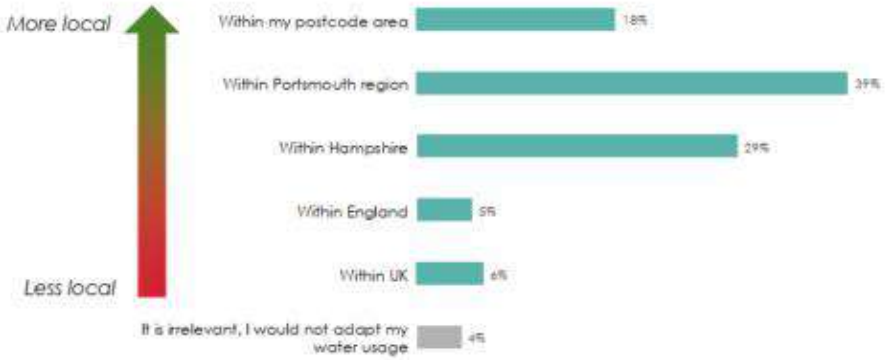
BLUE MARBLE

Most customers need to personally feel the impacts of a drought before they would adapt their behaviour

21

Almost 3 in 5 customers say a drought would need to be occurring within the Portsmouth region or closer before they would change their water use

How local would the drought need to be to feel impacted and adapt water using behaviour



Q17. To feel impacted by a drought period and adapt your water using behaviour, how local would the drought's impact need to be?
Base: All customer panellists (392).

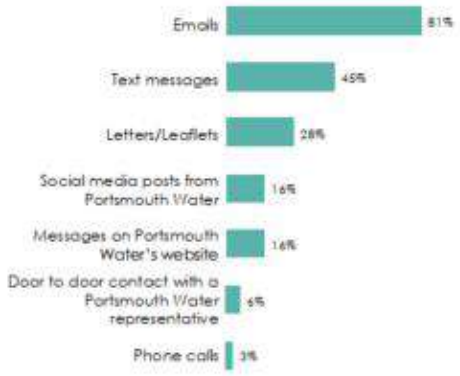
BLUE MARBLE

Customers want to be directly communicated with in the event of a drought

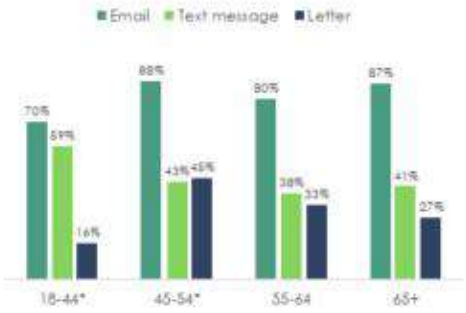
22

Emails, text messages, and postal communications are the preferred options

Preferred communication in case of drought



Top three preferred communications in case of a drought | by age



Q16. Some areas of the UK have enforced a Temporary Use Ban (previously known as a hose pipe ban) in response to recent dry weather.
If your area was to enter a drought period, Portsmouth Water might enforce a Temporary Use Ban and contact you with advice and tips for saving water. How would you like to be contacted in the case of a drought? Please select all that apply. Base: All customer panellists (392)

BLUE MARBLE

Customers generally feel they are responsible for leaks on their property

23

However, many feel that Portsmouth Water should provide support for finding and fixing these leaks

To what extent do you agree or disagree that…

Q18. One area in which we can save water is to reduce and fix leaks. Thinking about leaks, how much would you agree or disagree with the following statements? Base: All customer panellists (392)

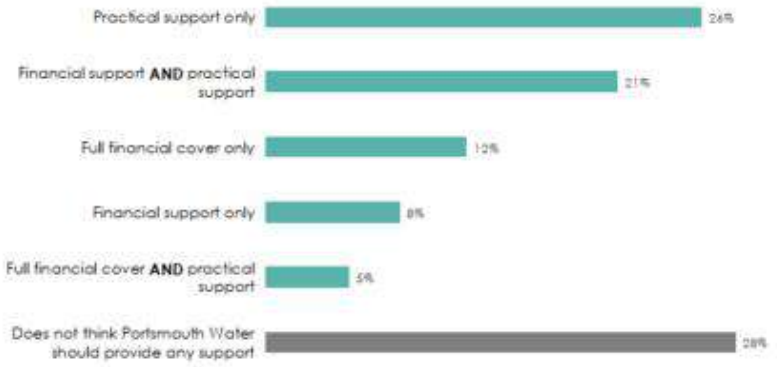
BLUE MARBLE

Around half of customers think Portsmouth Water should provide practical support for leaks

24

Just under half want some form of financial support (either full or partial)

Desired support for leaks

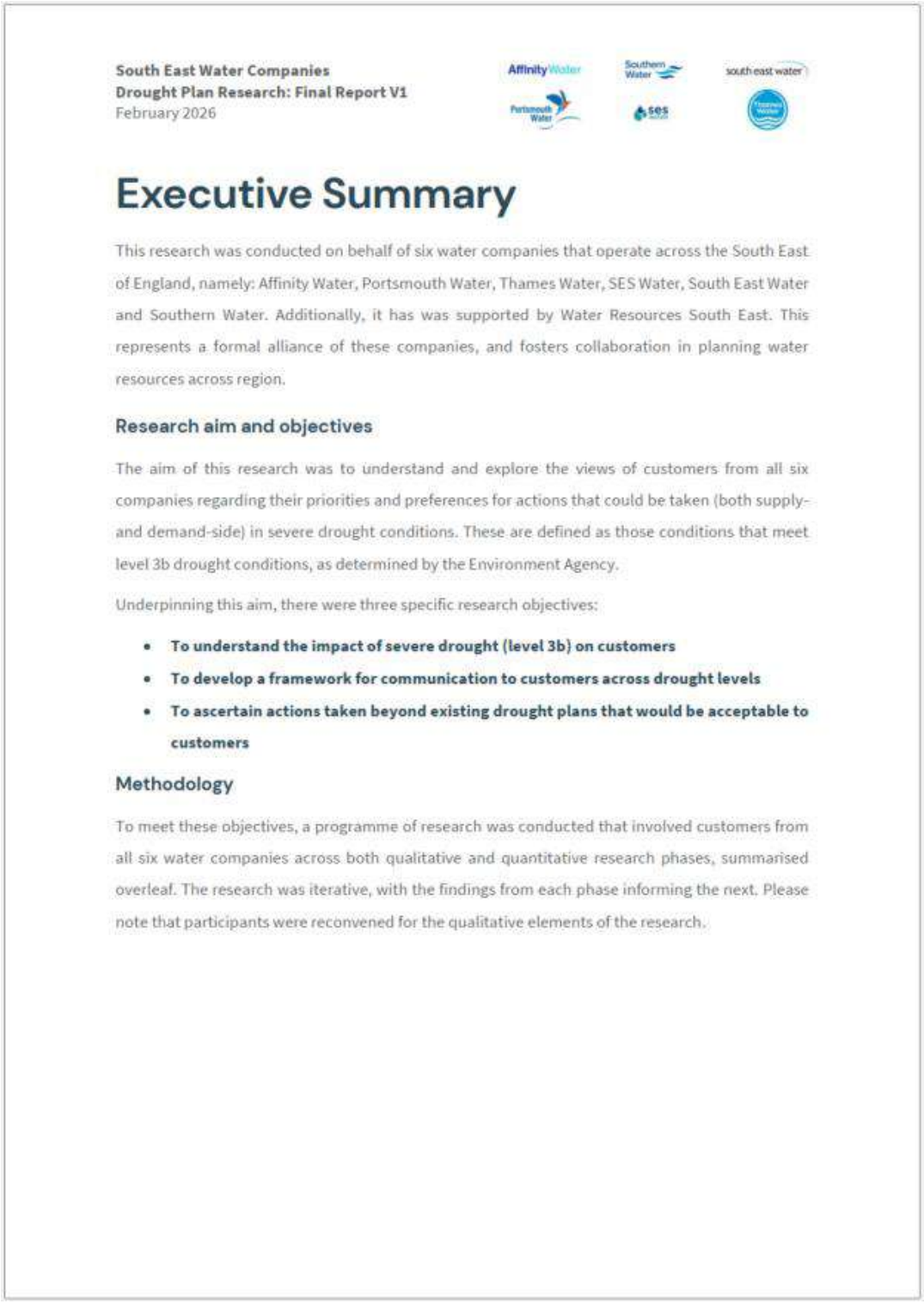


Q18a. What support do you think Portsmouth Water should provide in the case of you finding a leak in/on your property which needs fixing? Base: All customers (392)

AtkinsRéalis - Baseline / Référence

BLUE MARBLE

APPENDIX A, ANNEX 3: SOUTH EAST WATER COMPANIES (WRSE) DROUGHT PLAN RESEARCH, EXECUTIVE SUMMARY, FEBRUARY 2026



South East Water Companies
Drought Plan Research: Final Report V1
February 2026

Executive Summary

This research was conducted on behalf of six water companies that operate across the South East of England, namely: Affinity Water, Portsmouth Water, Thames Water, SES Water, South East Water and Southern Water. Additionally, it has was supported by Water Resources South East. This represents a formal alliance of these companies, and fosters collaboration in planning water resources across region.

Research aim and objectives

The aim of this research was to understand and explore the views of customers from all six companies regarding their priorities and preferences for actions that could be taken (both supply- and demand-side) in severe drought conditions. These are defined as those conditions that meet level 3b drought conditions, as determined by the Environment Agency.

Underpinning this aim, there were three specific research objectives:

- **To understand the impact of severe drought (level 3b) on customers**
- **To develop a framework for communication to customers across drought levels**
- **To ascertain actions taken beyond existing drought plans that would be acceptable to customers**

Methodology

To meet these objectives, a programme of research was conducted that involved customers from all six water companies across both qualitative and quantitative research phases, summarised overleaf. The research was iterative, with the findings from each phase informing the next. Please note that participants were reconvened for the qualitative elements of the research.

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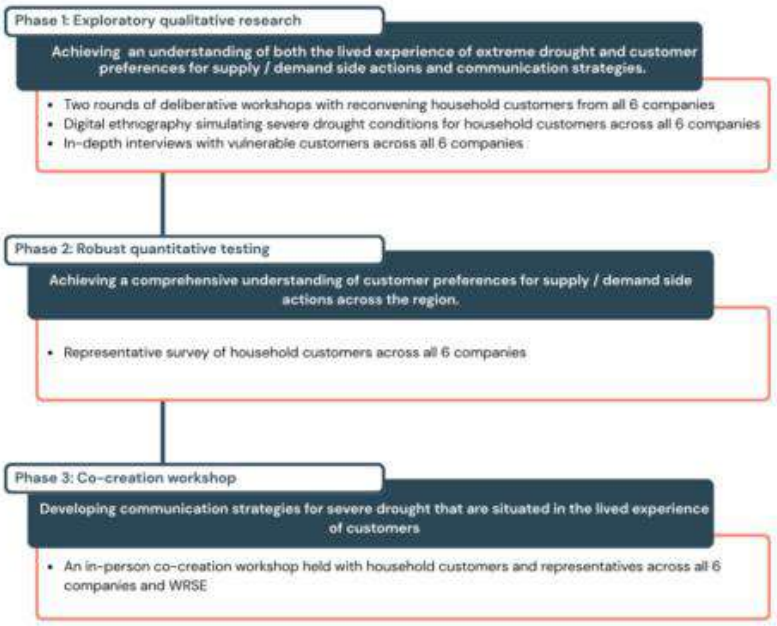


Summary of findings

Participant profile

	All qualitative phases of the research	Quantitative phase of the research	Total
Affinity Water	13	455	**468**
SES Water	14	100	**114**
South East Water	12	280	**292**
Southern Water	11	295	**306**
Thames Water	14	1174	**1188**
Portsmouth Water	11	96	**107**
Total	**75**	**2400**	**2475**

The lived experience of severe drought

The ethnographic role play, in which customers were asked to limit their water consumption to 50l over a 12-hour period, revealed that severe drought conditions are extremely challenging for customers. Many noted that they would have not been able to maintain the simulated conditions beyond the 12-hour period. Most participants managed to stay within their allocated volume of water by reusing water and employing trade-offs, such as not using their dishwasher during the 12 hours. Maintaining hygiene and looking after children were viewed as particularly challenging.

The requirements of vulnerable customers

For this research, customer vulnerability was defined as having a disability and / or long-term health condition that may impact reliance on water or ability access sources of water. These interviews revealed a heightened reliance on water amongst these customers, both in maintaining hygiene and in managing the impact of their conditions There was, therefore, anxiety about the impact of water restrictions on their ability to manage their daily lives. Additional measures of support that could help mitigate this impact were listed as:

- Securing their access to water during severe drought
- Additional information on eligibility for exemptions during severe drought
- Communications that would be accessible to all and clearly outlined the impact of drought on them.

Interviews also revealed concern that exemptions could result in stigmatisation and the importance of education on disability and the requirement for exemptions was therefore discussed.

Preferences for supply- and demand-side actions.

Within the qualitative research a preference for regional measures was stated, as it was viewed as the fairest approach. In both qualitative and quantitative phases of research it was found that:

- **There was a stong preference for actions that were understood to be feasible and low cost.**
- **Education to inform customers about the impact of severe drought and how water can be saved in daily life was viewed to be critically importnat.**
- **Financial incentives were widely acceptable, however penalties were viewed as punitive and potentially unfair.**

Within the qualitative research, participants were asked to prioritise supply and demand side actions, shown below.

Demand-side actions	
Priorities	Non-priorities
Education campaigns	Free and fast pipe repairs
Use of alternative water sources	
Use of water efficiency devices	Removing exceptions
Provision of incentives	

Supply-side actions		
Priorities	Lack of consensus	Non – priorities
Reducing water pressure	Tanker water around the country	Take water from other sources
Network trades between companies	Desalination	
	Recycling water	

Within the quantitative research, participants were asked to score the acceptability of both supply- and demand-side actions (with 1 being the least and 10 the most acceptable). The findings are shown below.

Action	Mean acceptability score
Campaigns to raise awareness of the issues and educate customers about actions they could take to save water.	8.4
Provide free pipe repairs for leaks within a customer's property.	8.2
Providing water efficiency devices for customers to save water.	8.0
Neighbouring water companies sharing water between themselves to increase supply to affected regions.	8.0
Asking all customers to reduce their water use (removing exceptions)	7.3
Water companies tankering water across sea and / or road	6.9
Ask customers to recycle water in their homes	6.7
Reduce water pressure to homes.	6.4
Desalination	6.3
Water recycling	6.2
Use alternative water sources	4.5

In terms of financial penalties and rewards, participants were asked to judge the following options:

1. **Community rewards**
2. **A set bill discount**
3. **A rising bill discount**
4. **A point reward system**
5. **Price thresholds for different levels of consumption (penalising higher users)**

Universally, incentives were preferred over penalties. Within the quantitative research these received higher mean acceptability scores, 7.9 for set bill discount and 7.8 for rising percentage bill discount in comparison to 6.4 for penalties. Fairness was a key concern, with participants noting that those in larger households or unable to reduce consumption should not be unduly sanctioned. Further, there were concerns that community rewards and points rewards would not present as effective an incentive a direct bill discounts.

Communication strategies to be employed in severe drought

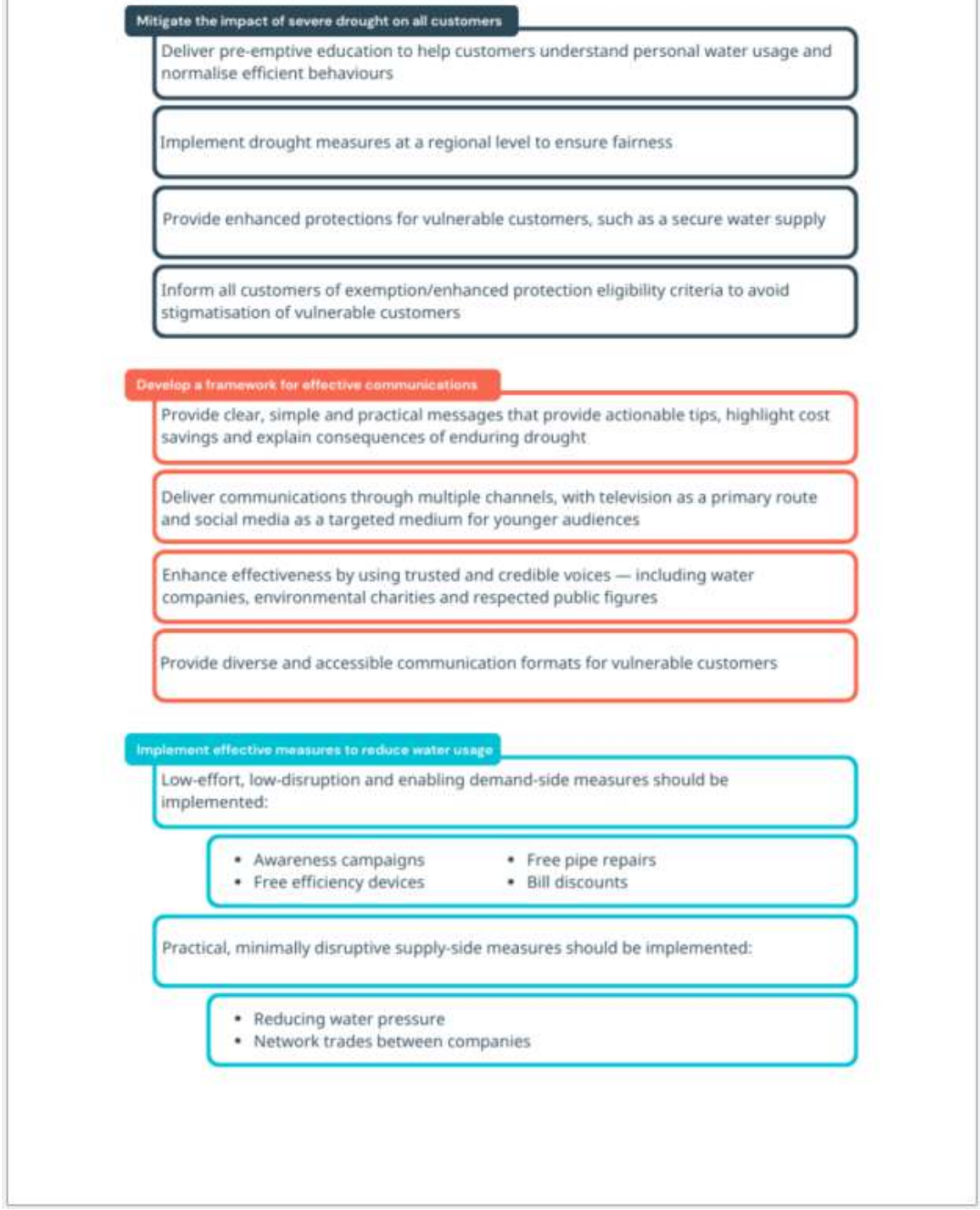
Throughout all phases of the research there was a call for clear and practical communication messages that were disseminated across multiple sources. There was also a call for messages to come from 'trusted voices' and an acknowledgement that it would be more powerful if water companies were to act in partnership with outside agencies to undertake this (i.e., trusted celebrities).

The research culminated in a co-creation workshop, in which customers and water company representatives met to discuss and agree effective communication strategies during severe drought. To focus discussions, 3 personas were created and effective communications for each were agreed.

- **Average Joes** were identified average customers who might underestimate their daily usage and should be reached with messaging that:
    - Used visuals of depleted natural sources of water
    - Highlight common behaviours and water usage
    - Set a target to reduce usage
- **Teenagers** were identified as a high-usage group who should be targeted directly with messages:
    - Delivered via social media
    - Made to empower the teenagers
    - Backed up by education campaigns
    - Focused on the future
- **'Don't get it/Don't care'** were defined as customers who did not look to reduce their water usage and could be encouraged to participate in water savings by:
    - Reinforcing the personal consequences of no compliance, including penalties
    - Highlighting the realities of level 4 drought

Strategic recommendations

This research has produced several clear recommendations for future Drought plans. These are summarised overleaf.


Mitigate the impact of severe drought on all customers
Deliver pre-emptive education to help customers understand personal water usage and normalise efficient behaviours
Implement drought measures at a regional level to ensure fairness
Provide enhanced protections for vulnerable customers, such as a secure water supply
Inform all customers of exemption/enhanced protection eligibility criteria to avoid stigmatisation of vulnerable customers
Develop a framework for effective communications
Provide clear, simple and practical messages that provide actionable tips, highlight cost savings and explain consequences of enduring drought
Deliver communications through multiple channels, with television as a primary route and social media as a targeted medium for younger audiences
Enhance effectiveness by using trusted and credible voices — including water companies, environmental charities and respected public figures
Provide diverse and accessible communication formats for vulnerable customers
Implement effective measures to reduce water usage
Low-effort, low-disruption and enabling demand-side measures should be implemented:
• Awareness campaigns
• Free efficiency devices
• Free pipe repairs
• Bill discounts
Practical, minimally disruptive supply-side measures should be implemented:
• Reducing water pressure
• Network trades between companies