

Draft Drought Plan 2027

Annex 1: Pre-consultation

May 2026



from
**Southern
Water** 

IMPORTANT NOTE:

This Annex is incomplete and the table below describes progress, along with work still to be completed.

Annex 1 Pre Consultation	Description
Annex % Complete	75%
Work Completed	<p>Pre-consultation with key stakeholders - August to October 2025.</p> <p>Section 1 Introduction, Section 2 Regulators and stakeholders (except Section 2.1), Section 3 Wider stakeholders and Section 4 Customer Insights.</p> <p><i>This Annex is in draft form only. As indicated below, the content remains subject to further analysis, regulatory input and evidence and may be amended prior to finalisation of the Drought Plan. Southern Water does not invite reliance on this section in its current form.</i></p>
Work Remaining	Updates to Section 2.1 (Regulators and stakeholders).
External Deliverables	<p>Consultancy support Mott MacDonald is updating the Strategic Environmental Assessment (SEA) for Drought Plan 2027 (DP27) and will be carrying out the SEA scoping consultation</p>
	<p>Regulatory support Regulators' responses to SEA scoping consultation will be required ahead of updates to Section 2.2.</p> <p>Workshops and meetings aligned with drought plan, drought orders and permits and licence changes</p>
Dependencies	Regulatory response to SEA scoping consultation.
Critical Path	Pre consultation with regulators, stakeholders and customers will continue to the point of draft submission and inform further updates to this Annex.
Timeline	<ul style="list-style-type: none"> SEA scoping consultation will be complete by end May 2026 This Annex will be continually reviewed and updated as engagement on DP27 progresses and will be completed ahead of full draft submission.

<p>Decision points, meetings and workshops</p>	<p>Attendance at the April and May 2026 Testwood Drought Order Lessons Learned workshops will inform updates to this Annex and other relevant sections of the drought plan.</p> <p>We have a following-on joint workshop with Catchment Partners and South East Water planned for 20 May 2026 to discuss drought and catchment management.</p> <p>Future workshops and meetings with regulators will be arranged as required.</p>
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1. Introduction

This annex sets out the pre-consultation and engagement we carried out and reviewed to help inform our draft Drought Plan 2027. This is based on both business-as-usual engagement with regulators, customers and stakeholders, as well as specific activities undertaken to inform updates to our draft plan. All of the work described here was undertaken before the statutory public consultation.

We have engaged with regulators, in particular the Environment Agency (EA) and Natural England (NE), environmental and trade organisations, retailers and domestic and business customers.

We have also worked with neighbouring water companies, regional organisations such as Water Resources South East (WRSE) group and Water UK to inform our planning and help develop consistent approaches across the UK, to provide clearer messages and actions for customers.

We have also incorporated a number of strands of customer insight work carried out as part of business-as-usual activities during recent years. These have considered the value of water, success of messages, heatwaves and water scarcity, attitudes towards restrictions and, in particular, emergency restrictions. This research covers bill-payers, young people, customers in our Western area affected by a higher likelihood of restrictions, vulnerable customers and businesses.

2. Regulators and stakeholders

Under Section 39B (7) of the Water Industry Act 1991, prior to preparing its Drought Plan, each water company must consult the Environment Agency (EA), the Water Services Regulation Authority (Ofwat), the Secretary of State (Defra) and any licensed water supplier which supplies water to premises in the undertaker's area via the undertaker's supply system.

On 5 September 2025 we wrote to the following organisations inviting their comments:

- Statutory consultees: EA, Defra, Ofwat and NE.
- Water suppliers: Thames Water, Wessex Water, South East Water, Affinity Water, SES Water, Portsmouth Water, South West Water, Leep Utilities, Advanced Water Infrastructure, Matrix Water, Mua Water, Albion Water, ESP Utilities Group, Independent Networks Association, ST-Connect, Independent Water Networks Limited and Icosa Water Services Limited.
- Customer organisation: Consumer Council for Water (CCW).
- Local Authorities and County Councils; and
- Stakeholders: National Farmers Union, Rivers Trusts (Western Sussex, Ouse & Adur, Sout East and Wessex), Island Rivers Catchment Partnership, RSPB, CEFAS, Wildfish, Sussex Wildlife Trust and Freshwater Habitats Trust.

A copy of the letter is attached as Appendix A.

Responses to the pre-consultation letter were received between August and October 2025 from the Environment Agency, Natural England, Historic England, Advanced Water Infrastructure, Wealden, Test Valley and Basingstoke & Deane councils, the Sussex North Authorities, Portsmouth Water and South East Water.

Feedback from the pre-consultation is being used in the development of the drought plan.

2.1 Strategic Environmental Assessment scoping consultation

The SEA scoping consultation is due to take place in April 2026 and the outcomes will be summarised here once complete.

2.2 Drought permit/order workshops

We completed two out of three planned workshops with the Environment Agency (EA), Natural England (NE) and Defra on 18th and 19th March 2026 to discuss lessons learned from the River Test drought order process in 2025. The workshops comprised:

- Workshop 1 – environment assessments, compensation and mitigation. 18th March 2026.
- Workshop 2 – project management and statement of need. 19th March 2026; and
- Workshop 3 – Extreme Shortage of Rain. Date TBC with Environment Agency.

During 2025 we drafted a final version of Drought Plan 2022 (DP22) and had meetings and workshops with the EA to discuss final changes to the plan. We received permission from Defra to publish a final version of the plan during July 2025, once a selection of change had been made to the final draft of the plan. The published version of DP22 was published on our external website on 8th August 2025.

We have not yet held formal workshops with the EA or NE to discuss drafting DP27, due to the limited time available. We received pre-consultation feedback from both regulators during September through to November 2025 which have provided a steer for developing this draft plan. A key aspect of completing DP27 however, is agreeing how to manage our Hampshire water supply area during a drought, with particular regard to the proposed River Itchen licence and Hands off Flow (HoF) change aimed at further protecting the native Salmon and invertebrates in the river.

An Area Flow Targets workshop was hosted by the EA on 11th February 2026 to discuss their findings regarding the River Itchen. Southern Water received summaries of the hydrological and ecological evidence prior to the workshop, and the full technical reports have been requested.

Following the February workshop, Southern Water provided a response to the EA on 13th March 2026 outlining key issues related to the proposed change the River Itchen licence and HoF. We are awaiting a response to the EA and anticipate that further workshops and meetings will be needed to discuss how to manage drought in Hampshire based on the 2025 drought lessons learned and proposed changes to the River Itchen licence.

3. Wider stakeholders

3.1.1 East Sussex Catchment Partnerships

On 21 May 2025, South East Water, Southern Water, Adur and Ouse Catchment Partnership and Cuckmere and Pevensey Levels Catchment Partnership held a joint event at Barcombe Village Hall.

The event followed a stakeholder request from those who attended a WRMP event in Newhaven in 2024, for both Southern Water and South East Water to hold joint events with the catchment partnerships, as those

we wish to collaborate with are all members of these groups. The purpose of the event was to seek feedback on various elements of the water company drought plans, which could be used to shape Southern Water and South East Water's draft DP27.

The aims of the event were to:

- Deep dive into the drought trigger levels and seek stakeholder feedback on whether they're current or need to be updated.
- Give stakeholders the chance to let the companies know about localised environmental hotspots and issues which may affect their plans, or whether there's the opportunity for water licence trading.
- Provide stakeholders the opportunity to feedback how they would like to be notified about potential droughts in the future; and
- Review data sharing opportunities.

In total, 25 stakeholders attended the event from a range of organisations:

- Environment Agency.
- Water Resources South East.
- Eastbourne and Lewes District Council.
- South Downs National Park Authority.
- Sussex Wildlife Trust.
- Wealden District Council.
- CLM.
- So Sussex.
- JBA Consulting.
- Brighton University.
- Rother District Council.
- Brighton and Hove City Council.
- Water Week.
- Brighton and Hove City Council; and
- Love Our Ouse.

The Southern Water team also presented an update on development of the new Drainage Water Management Plan for publication in 2028 (DWMP28) and to alert attendees of future consultation events needed to develop the draft DWMP28.

Key topics discussed in breakout groups comprised:

- Knowledge of drought and its impact on stakeholders.
- Local issues and challenges related to drought.
- Collaboration before and during a drought.
- Drought triggers and measures associated with triggers.
- Communication methods; and
- Data collection and sharing.

A document collating all of the breakout group sessions was shared with attendees after the workshop and outputs used to shape the water company draft drought plans.

3.1.2 Western Rother Catchment Partnership

Southern Water also attended an Arun and Wester Streams Catchment Partnership meeting on 9th September 2025 to present the company plan to develop draft DP27 and ask for Catchment Partnership support during the pre-consultation process. Catchment Partnership members and other meeting attendees included representatives from:

- Environment Agency.
- Portsmouth Water.
- National Farmers Union.
- Western Sussex Rivers Trust.
- West Sussex County Council.
- Royal Society for the Protection of Birds; and
- South Downs National Park.

Key feedback from the Southern Water presentation was that the Catchment Partnership wanted to support drought messaging as it was felt the members of the partnership would respond better to messaging from the organisation than from a water company.

3.1.3 Independent Climate and Environment Challenge Group

The Independent Climate and Environment Challenge Group (ICECG) provides expert, independent advice and constructive challenge to Southern Water. It plays a vital role in shaping our environmental plans and making sure we deliver on our commitments.

Established in 2022 the ICECG brings together experts from different fields to share science-based insights and a range of perspectives. By understanding changing expectations and environmental challenges, the group helps us make informed, responsible decisions for the future. It's part of our commitment to increase our transparency, accountability, and highlight the difference feedback makes.

The ICEG is chaired by Martin Hurst, an independent expert in climate change and sustainability. Group members are carefully selected for their expertise and independence across key areas including regulation, conservation, agriculture, and local government. Group members are:

- New Forest National Park Authority.
- Consumer Council for Water.
- Rivers Trust.
- National Farmers Union.
- Southern Coastal Group.
- West Sussex County Council.
- South East Rivers Trust.
- Water Resources South East.
- RSPB.
- Blue Marine Foundation.
- The Wildlife Trusts.
- Natural England.
- Kent County Council.
- Hampshire County Council.
- South Downs National Park Authority.
- East Sussex Council.
- Isle of Wight Council.
- Environmental Agency; and
- Plantlife.

We have provided ICEGG with several updates during 2025 on the status of the prolonged dry weather experienced through the spring and summer and how Southern Water was responding to drought in Hampshire. ICEGG have also been given regular updates on the publication of DP22 and the development of draft DP27. As part of our DP27 development, ICECG discussed how the company communication of water scarcity and drought can be enhanced, as it was recognised that water company public reputations could be limiting the impact of public communications issued by a water company.



ICECG agreed that public response to drought messaging may be more successful if independent organisations were providing the key drought messages, rather than relying just on a water company. As a consequence, Southern Water will work with ICECG members to co-ordinate our future drought and water scarcity messaging to ensure that information is shared as wide as possible and to ensure messaging has the best opportunity to change public water use during prolonged periods of dry weather.

4. Customer engagement

4.1 Our Approach to Customer Engagement

At Southern Water our approach to customer engagement is driven by 12 participation principles – providing the guidelines we follow (Figure 4-1). For the Drought Plan 2027 this means we triangulate views from:

- The wealth of existing insight (e.g. WRMP24, DP22, PR19, PR24)
- BAU research continually looks at attitudes and behaviours in the moment
- Fresh insight using industry best practice running specific engagement through deliberative panels with a range of customer segments (e.g. Water Futures Programmes and deliberative panels for business planning processes)
- Collaboration with the industry (e.g. joint engagement with WRSE on regional planning for water resources)

Figure 4-1: Customer Participation Principles



4.2 Background

We recognise that there have been a number of droughts in the South East since 2000 and there is an expectation that these events are likely to happen more often in the future, due to the changing climate. Our Drought Plan sets out how we would deal with a drought in Sussex, Kent, Hampshire and the Isle of Wight. It

outlines the steps we would take to ensure we can maintain supplies of drinking water to our customers while minimising the impact on our rivers and the environment during drought events.

In the South East, water resources are under pressure and the region is classed as an 'area of serious water stress' by the government. These resources have and will continue to come under further pressure due to proposed abstraction licence reductions which restrict the amount of water we can abstract from groundwater and surface water sources. In the future, a growing number of houses in the region and the effects of climate change on our weather patterns will also affect the resources available to us.

Our customers are at the heart of what we do and the decisions we make. This is why we implemented a robust engagement plan with customers from across our operational area to understand their views and challenges on the drought plan, which tapped into our ongoing BAU insight. This allowed for us to engage with customers across our region who were able to provide both informed and un-informed views on plans as part of the consultation process. A drought plan can only really succeed with the support and implementation of our customers and that's why it is fundamental we understand their views.

As set out in Figure 4-1 above, one of our participation principals is "partnering" - and this also means supporting other water companies with our insight capabilities. We worked in complete partnership with Portsmouth Water and boosted recruitment of their customers to our continuous deliberative household and youth groups. In addition, we ran joint bespoke customer research to review both the Southern Water and Portsmouth Water Drought Plans. For the latest drought plan we took this one step further and through 2025 we worked with all the South Water companies: Affinity, Portsmouth Water, SES, South East Water, and Thames Water.

Working with other water companies allows us to not only succeed together but helps us learn from each other. This enhances our understanding and enables us to deliver a better experience. Building on these partnerships and collaborating in future is something we are committed to continuing.

4.3 Objectives

Following the introduction of the Southern Water Customer Participation Strategy in September 2018, we are working to continue to bring customer thinking directly into our ongoing activity. Obtaining customer feedback on the drought plan consultation provides an opportunity for more inclusive views on our plans to tackle drought through our BAU insight channels.

Our primary objective:

- Detailed exploration of our Drought Plan with customers to ensure we developed a plan that is driven and supported by customers.

Secondary objectives:

- Ensure more inclusive feedback by including the views of young people, businesses and harder to reach customers.
- Understanding how customers want to be communicated with about drought and how this differs for different groups. Build customer knowledge of water resource issues in the South East.

4.4 Methodology and approach

Through our existing insight programmes we were able to gather the views of customers who were well-informed and had good knowledge of the industry and our practices. In addition we captured the views of existing customers who were less informed but could provide a fresh perspective – this was achieved through our existing Water Futures 2030 panel. We also used our youth panel to gauge reactions to the Drought Plan



from a young people’s viewpoint – Water Futures 2050. Both of these panels consisted of an online community of participants managed by one of our partnered research agencies. In addition to the BAU insights, we also commissioned standalone pieces of research to focus on what businesses felt about the Drought Plan and how this might have differed from households.

One of our priorities when we undertake research is ensuring that we are as diverse and inclusive as possible, whilst learning through interactions about how we are able to engage with harder to reach customers. As part of the Drought Plan '22 consultation – we reached out and spoke with 6 expert stakeholders who represent harder to reach audiences (Citizens Advice, housing associations, language assistance reps, supported living, etc.). Insight from another study (Customer Engagement - DP2019) told us that this was the best way to engage with customers about the drought plan.

Since the 2021 Drought Plan engagement, Southern Water has continued to operate a comprehensive, business-as-usual customer insight programme, ensuring customer perspectives are captured continuously and embedded across planning, delivery and operational decision-making. Rather than relying on periodic consultation exercises, insight into drought, water resources and broader service priorities is generated through a layered and ongoing approach, combining strategic research, regional collaboration and day-to-day customer engagement (Table 4-1).

Table 4-1: Customer Insight Programme

Project/Programme	Project Overview	Approach and sample	Output
Regional Drought Planning	Southern Water has actively participated in cross-company and regional programmes of engagement, including work undertaken through Water Resources South East (WRSE). This collaboration has enabled consistent, structured engagement on water resources and drought planning topics across the South East, using shared methodologies, deliberative techniques and aligned research frameworks.	2,475 customers from across the South East, including 306 Southern Water customers. The programme followed a 3-stage deliberative approach starting with exploratory research using digital ethnography to capture the lived experience of drought and restrictions. Robust quantitative followed. A reconvened co-creation workshop with customers and water company leads drew together the final strategies.	<i>South East Drought Research Report Feb 2026</i>
Drought Comms Review 2025	Bespoke testing of drought communications, particularly during and following live drought conditions, using established customer panels. This activity formed part of a wider, iterative approach to engagement, ensuring that planning and communications activity is informed by real-world conditions rather than hypothetical scenarios. The insight is then used to help in future drought scenarios.	57 customers took part in a week long qualitative exercise to review and provide individual feedback on communications. The research looked at all drought communications on TUBs from across water companies, including Southern water. It also reviewed an Ofwat cross regional campaign.	<i>WF2030 and Drought Comms Full Report October 2025</i>
Drought Plan groups	Specific groups set up to have detailed discussion around the drought plan which was provided to participants prior to the focus groups taking part. We gauged feedback on the plans, comprehension of the plans, as well as support for the principles and their views on how we communicate.	4 x 2 hour group focus groups. 2 groups of household customers who have been part of our Water for Life Hampshire panel, 1 additional group of Water Futures 2030 panellist who are household customers from across Hampshire, Sussex and Kent. 1 group of 8 Portsmouth Water only customers.	<i>Household Customer Engagement – Drought Plan ‘21</i>
Water Futures 2030 and Water for Life Hampshire	Deliberative consumer panel which is central to all our insight for strategic planning and PR-24 programme through continuous engagement.	Exploration of the drought plans undertaken by 63 panellists as part of our deliberative consumer panels. These customers are spread across the region to reflect the diverse area we operate within. This was followed up by 5 x 1 hour discussion to review the findings.	<i>Household Customer Engagement – Drought Plan ‘21</i>

Project/Programme	Project Overview	Approach and sample	Output
Water Futures 2050	Our young person's group of future customers who focus on providing insight for our long term strategy – and ensuring customers of tomorrow have their voices heard in our strategic planning.	1 week online community with 46 participants being introduced to the drought plan (10 Portsmouth Water customers). This includes super future customers (14-15 year olds still in education), future customers (16-21 years old) and first time customers (22-30 year olds) spread across our region. Followed by 6 x 75 minute focus groups reviewing the plans in more detail.	<i>Future Customers and Drought overview '21</i>
Non-Household Consultation	We used an existing network of businesses across our region and that of Portsmouth Water to engage these customers on the proposed drought plan.	25 x 1 hour interviews with business customers (mix of those who are reliant on water for their product /service). This included 8 businesses from the Portsmouth Water operating area.	<i>Business Customer report – Drought Plan '21</i>
Expert Stakeholders interviews	Engagement of expert stakeholders, which allowed us to have a broader view of what our customers from different backgrounds and cultures need during drought conditions.	6 x 1 hour interviews with representatives of harder to reach customers who represent both Southern Water and Portsmouth Water customers (including signposting services, housing services, language assistance and supported living representatives).	<i>Expert stakeholder report – Drought Plan '21</i>

This approach meant that we were able to reach a large number of customers from across our entire region, from different backgrounds/cultures, as well as customers at different life stages. The range of customers we spoke to really gives us a robust overall reflection of their views on the Drought Plan.

Our methodology has also given us the opportunity to speak directly and in detail with over 100 customers from different life stages, backgrounds and cultures. As well as feeding back their views on the proposed Drought Plan, these customers now have a better understanding of the challenges we face at Southern Water. This research is vitally important to understand moving forwards how we communicate with customers, what stages they expect to hear from us and what channels we should use to maximise customer awareness.



4.5 Continuous Insight

4.5.1 Business-as-usual insight and everyday engagement

Alongside strategic research, Southern Water operates a mature business-as-usual insight function, designed to capture the voice of customers on an ongoing basis, at scale and across multiple audiences. In the most recent year alone, this has included:

- Direct engagement with over 50,000 customers
- Representing more than 10,000 hours of customer feedback



- Supplemented by millions of additional data points from operational interactions, complaints, contacts, social listening, demographic data and external sources

This engagement is continuous and spans:

- Households and families
- Businesses and developers
- Vulnerable customers and those requiring additional support
- Young people and future customers
- Diverse communities and community leaders
- Local stakeholders, councils and expert groups

Customer views are gathered through a range of quantitative and qualitative methodologies, including standing panels, surveys, in-depth interviews, deliberative workshops, community engagement, behavioural trials, digital feedback and analysis of live operational data.

4.5.2 Integration into decision-making

Crucially, customer insight is not held in isolation. The business-as-usual insight programme is embedded into everyday ways of working, supporting:

- Water resources and drought planning
- PR24 and longer-term strategic business planning
- Communications and behaviour-change campaigns
- Incident response and service recovery
- Vulnerability strategy and support design
- Reputation tracking and regulator engagement

Insight is triangulated across sources and refreshed regularly, ensuring that planning assumptions remain up to date and reflect evolving customer experience rather than a static evidence base. This approach means that since 2021, Southern Water has maintained continuous customer engagement on drought and water resource issues, rather than restarting engagement at each planning milestone. Strategic research, regional collaboration and day-to-day insight activity operate together as a single system, providing confidence that customer views informing the Drought Plan are current, methodologically robust and grounded in sustained engagement.

4.6 Overall summary findings

Since publication of the 2021 Drought Plan customer insight summary, Southern Water has continued to build a substantial and robust evidence base on customer attitudes, experiences and expectations in relation to drought, water scarcity and drought communications. This includes participation in major regional research commissioned with Water Resources South East and five other water companies in 2025–26, alongside more recent, in-depth engagement with Southern Water customers through the Water Futures 2030 panel during the summer of 2025 – really focusing on how we communicate drought across the region.

Primary Sources of Customer Insight:

- South East Drought Research Report Feb 2026
- WF2030 and Drought Comms October 2025
- Business Customer report – Drought Plan '21
- Expert stakeholder report – Drought Plan '21
- Future Customers and Drought overview '21
- Household Customer Engagement – Drought Plan '21

Collectively, this more recent insight **strongly reinforces the key conclusions reached in 2021**, while also providing deeper, lived-experience evidence of how drought affects customers in practice and greater clarity on what is seen as fair, acceptable and effective during periods of water stress.

Key developments since 2021 include:

- **Drought is now perceived as a real and near-term risk**, rather than an abstract or distant issue. Experience of live restrictions, combined with national media coverage linking drought to environmental, food supply and infrastructure impacts, has increased customer awareness and concern.
- **Willingness to act remains high** but is conditional. Customers are prepared to change behaviour and accept restrictions provided actions are clearly explained, applied fairly and accompanied by visible action from water companies themselves.
- **Household circumstances matter more than ever**. Larger households, families with children and customers with health conditions or disabilities experience severe drought very differently, reinforcing the need for proportionate, needs-based approaches rather than “one size fits all” measures.
- **Education, incentives and practical support consistently outperform penalising approaches**. Customers strongly favour education campaigns, water-efficiency support and modest financial incentives over penalties or highly disruptive measures.
- **Expectations of communication have increased**. Customers now expect earlier, clearer and more joined-up communication, ideally coordinated at regional or national level, but delivered with clear local relevance and tangible explanations of impact.

Overall, the newer evidence confirms that the strategic direction established through the 2021 drought engagement remains sound, while strengthening the case for **earlier engagement, clearer demonstration of fairness, and more tangible communication of both customer and company action** during periods of water stress.

4.7 Perceptions of water scarcity 2021-2026

4.7.1 Customer understanding of drought and water scarcity

In 2021 Customer understanding of drought in the UK was limited, with many struggling to imagine what drought would look like in practice or how it would affect everyday life. More recent research shows that while customers still tend to underestimate everyday water use, drought is slightly more clearly understood as a national, personal and immediate issue rather than a distant or regional problem (Figure 0-1 and Figure 4-3). **However, perceptions of water scarcity for the future remain extremely low.**

Customers who have experienced or reflected on realistic drought scenarios report significantly higher understanding, concern and willingness to act. Making drought impacts tangible – particularly through real-world examples relating to hygiene, food, wildlife and infrastructure – markedly improves comprehension.

4.7.2 Acceptance of restrictions and drought measures

2021 told us that customers were broadly accepting of restrictions, particularly at more severe stages, with COVID-19 shaping expectations around collective action in a crisis.

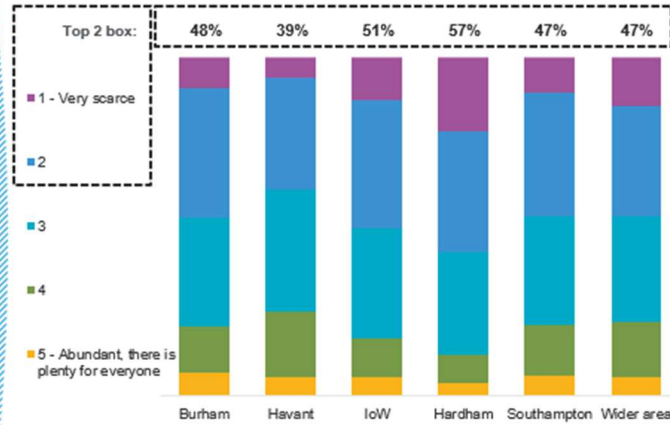
Fast-forward to today and acceptance of restrictions remains high, but is clearly **conditional rather than unconditional**. Customers support restrictions where they are seen as necessary, fairly applied and proportionate to the severity of drought. There is strong resistance to measures perceived as punitive, unclear or inconsistently applied across regions. Low-effort, practical actions are viewed far more positively than extreme or disruptive interventions. Regional approaches are seen as fairer and easier to understand than company-specific rules.

Figure 0-1: Water Scarcity Perceptions - Future

This lack of understanding masks the urgency of water scarcity, even when looking to the future – including in areas needing new sources of supply



Water scarcity perceptions: In the future



The extent of water scarcity comes as a surprise to many. Most are unaware that the South East is one of the most water-stressed regions in the country. Frequent rainfall and proximity to the sea contribute to a false sense of security.

Customers often conflate water scarcity with infrastructure issues, failing to recognise it as a supply-demand imbalance exacerbated by population growth and climate change.

"Seeing the reality of [water scarcity]... It was quite shocking, actually." West Sussex

"It's not just the population growing... With every new build, there is more and more concreted over... It's not going into the land, it's going into the drains." Havant

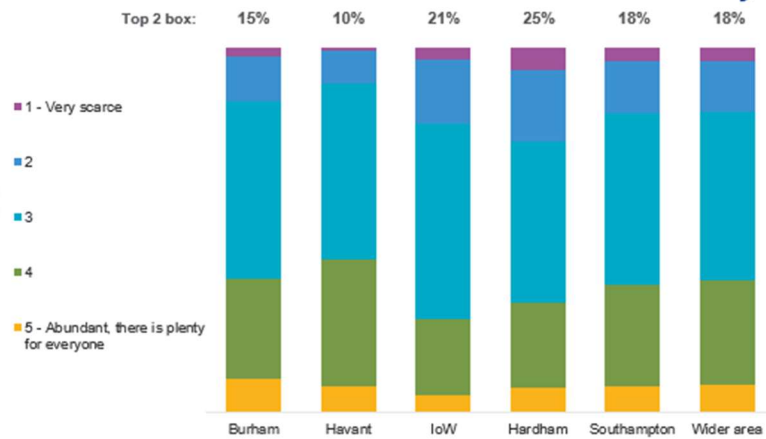
A1. How much fresh water do you think there is for people living in the South East now, and in the future?
Base: Southern Water customers, 2025 in each area: Burham 254 / Havant 245 / IoW 269 / Hardham 259 / Southampton 240 / Wider area 478

Figure 4-3: Water Scarcity Perceptions - Now

Therefore, the immediacy of the issue is not known, with only a minority of customers concerned about water scarcity now



Water scarcity perceptions: Now



In line with Reputation Tracking (19%)

A1. How much fresh water do you think there is for people living in the South East now, and in the future?
Base: Southern Water customers, 2025 in each area: Burham 254 / Havant 245 / IoW 269 / Hardham 259 / Southampton 240 / Wider area 478



4.7.3 Fairness, vulnerability and household impact

In 2021, customers recognised the need for prioritising vulnerable customers and accepted that some audiences would require additional support during drought.

Recent research provides much deeper evidence on how drought impacts vary by household type. Customers with disabilities or long-term health conditions have a heightened reliance on water for hygiene, dignity and condition management, making severe restrictions particularly challenging. Larger households and families with young children face significantly greater impacts than smaller households. There is strong concern that blanket measures or penalties risk unfairly disadvantaging these groups, highlighting the importance of clear eligibility criteria, transparent explanations of exemptions and communications that reduce stigma.

4.7.4 Customer behaviour and motivation

In 2021 customers expressed willingness to reduce water use but often felt they were already “doing enough”.

We’ve learnt this year that customers continue to report high levels of personal water-saving behaviour, but recent evidence shows that **greater understanding of the reasons for drought leads to more proactive and sustained behaviour change**. Customers are more likely to act when they understand the collective impact of small changes and when water-saving actions are framed as fair, shared and meaningful. Education remains the strongest driver of long-term behaviour change.

4.7.5 Communications and engagement

Customers wanted clearer, more accessible communication using multiple channels and better explanation of what water use and restrictions mean in practice. However, experience of live drought communications in 2025 confirms and strengthens this insight. Proactive, multi-channel communication drives higher awareness and understanding, particularly when messages are consistent across channels. Customers respond best to simple, visually engaging communications with practical advice and tangible explanations (e.g. what litres saved mean in real terms). Communications perceived as routine, overly text-heavy or corporate are significantly less effective. Customers now also expect greater transparency around **what the water company is doing during drought**, alongside what is being asked of them.

4.7.6 Overall implication for the Drought Plan

Insight reinforces the core findings of the original Drought Plan engagement while clearly demonstrating that customer expectations have evolved. The evidence strengthens the case for **early and proactive engagement, emphasis on fairness and proportionality, targeted support for vulnerable customers, and communications that make drought and water use tangible, shared and credible**.

“I think the plan is very good as what I read informs me that the plan includes what the water companies do in the event of a drought, what we as customers need to do and how this will affect the environment.”

One of the key themes coming out of our research in 2021 with these audiences is a sense from the pandemic that people are more prepared for crisis management. Consumers use Covid as a reference point for situations like drought and the conditions being implemented. We can learn from how the government communicated during the pandemic, as this gives us an understanding of the public needs. This perception was evident from all the different research studies we undertook.

“Preventative measures earlier on would help to mitigate the effects of drought. We have learnt from the pandemic.” – Future customer

4.8 Key themes by audience

4.8.1 Household customer view

For many household customers, this research highlighted the need for further education around droughts. As mentioned before, it is clear that we can leverage customer feeling from the pandemic to help with implementation during a drought period– there is an opportunity to build on the current feeling by outlining that we are preparing for the future during the different stages of drought. The Drought Plan landed well with this audience – providing reassurance that there is a credible plan for all eventualities. Customers liked the comprehensive nature of the document which had the right level of detail, whilst providing a collaborative tone (Figure 4.4).

Figure 4.4: Customer levels of acceptance (Source: Household Customer Engagement – 2021)

- Clarity around levels of drought and water company and customer actions needed
- Clarity on restrictions for households and businesses, including exemptions, with sufficient supporting rationale
- Use of drought permits and drought orders only when absolutely necessary (ie. levels 3 and 4)
- Acceptance* of emergency restrictions in more severe drought conditions

- Customers largely support restricting households before businesses – but there’s a fine balance to be struck between transparency and drawing too much attention to it
- If exemptions are to be published in the Drought Plan (and not via links to a separate site), there will inevitably be some that are deemed controversial – strong feeling that there should be nationwide agreed exemptions during times of extreme restrictions
- When applying for drought permits and drought orders, customers support the idea that Southern Water has to apply to the EA or DEFRA for permits/orders before abstracting – some misunderstood that the orders/permits would be applied in level 2 drought rather than requested
- Surprisingly high amounts of customers claimed acceptance of restrictions for severe or emergency drought (levels 3 or 4) – Covid has increased acceptance of rules
- Customers don’t fully grasp the severity of the measures on their lives from the Drought Plan document – though it is not necessarily the role of the Drought Plan to achieve this.

“I think the plan is very good as what I read informs me that the plan includes what the water companies do in the event of a drought, what we as customers need to do and how this will affect the environment.”

Implications for household customers

As households are accepting of the drought plan and the potential restrictions, we can engage early with them through a number of channels on a more pro-active basis. Customers are satisfied knowing that there is a drought plan but Covid has increased expectations for smart and targeted messaging at the time these plans are implemented.

- ATL messaging essential to achieving sufficient breadth of coverage – potential to link to weather broadcasts
- SMS messaging would give a sense of urgency and make it relevant to individual customers
- Potential for location based apps similar to Covid apps.



4.8.2 Future customer view

Young people do not know about the risk of drought and there is a need to inform them on this as a starting point for engagement. To put this into context future customers we spoke to rated the likelihood of drought in the UK at 5.2 out of 10 (survey of 46 young people). Drought is seen as ‘all or nothing’ meaning there is little awareness of lower level mitigation – there’s a gap here for behaviour change to be implemented.

Young people have shown a willingness to play their part in a crisis, once they’re on board with the idea that a situation like a drought could happen. However, the misperception of what drought would look like in the UK means they are unprepared for the reality of how it could impact their lives.

Overall, Southern Water’s Drought Plan was positively received by young people and succeeded on many levels (Figure 4.5). Generally, Southern Water’s actions, including restrictions on customers and businesses and emergency measures, were seen as largely appropriate and fair, though there were some elements that needed further explaining and potential additional or earlier action.

Figure 4.5: Young people view on how to leverage the drought plan (Source: Future customers and Drought overview 2021)

Young people identify key tensions that would have to be carefully balanced for plans to be accepted

Protecting people	VS.	Protecting the environment	It was expected that the environment would be protected almost to the same extent as people, and as much as possible for this trade-off to be avoided.
Ensuring water availability now		Preventing longer term damage	Whilst ensuring water levels in the moment is important, young people don't want SW or PW to reach a point where damage is irreversible and contributes to underlying water scarcity issues.
Equal rules		Fair outcomes	Young people embrace exemptions as a way to protect the vulnerable and ensure fair outcomes. On the whole, however, equal rules are needed for the general public to ensure adherence to the rules and fair usage of water.
Penalties		Incentives	There is an underlying sense that the plan relies on penalties / negative potential consequences, whereas customers could be incentivised to reduce water usage during the impending drought or drought phases.

- At the early stages of impending drought, young people don't feel that their lives will be impacted directly, there is a desire for Southern Water to take preventative action
- At the drought stage, future customers feel more concerned about escalation and the risk to the environment – the restrictions at this stage feel appropriate and applying for permits seen as sensible but young people feel some recreational use of water could be allowed
- Young people see 'severe drought' as the tipping point where they want tangible direction on what they do and why – lockdown mentally prepared them to deal with restrictions. This is also a stage where young people accept the implications behind the drought order but become torn between protecting the environment vs people
- In an 'emergency drought', severe restrictions feel appropriate and expected as does compliance with what is being asked – no objections to following the restrictions but a feeling the government should step in sooner to prevent this stage from happening.

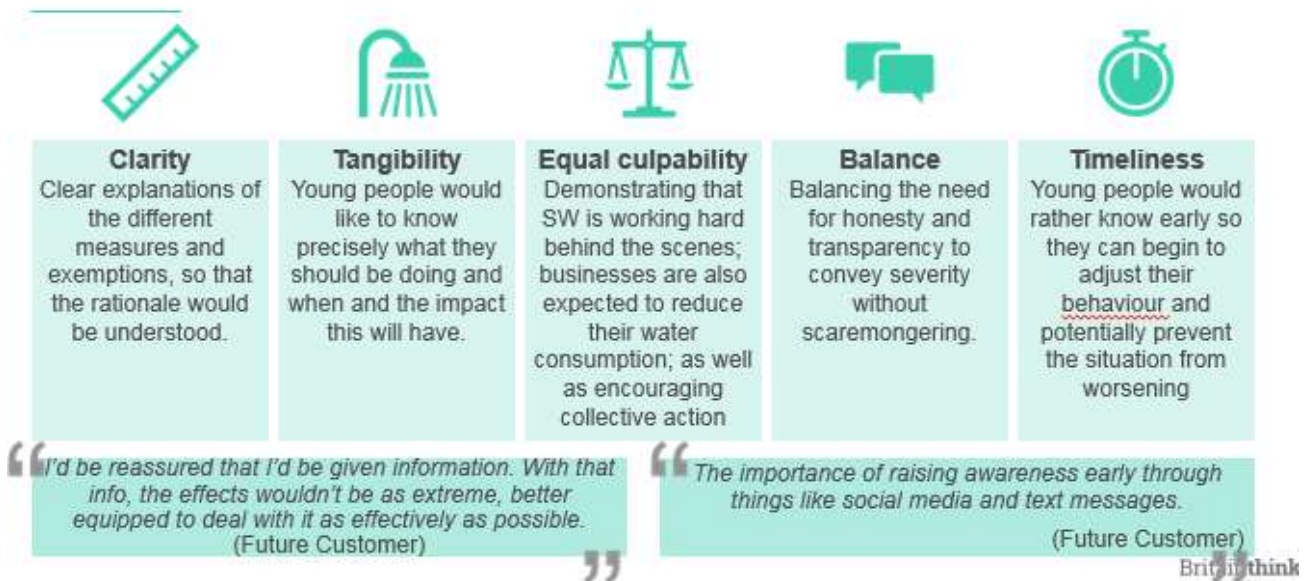
“I think in situations like this, time is of the essence, and therefore, it is important to work quickly to try and establish a clear plan, ensuring they can make the best out of a bad situation in plenty of time to ensure there is not any more severe water shortages.”

Implications for future customers

Young people have a clear view of their expectations during each stage of the drought plan and this audience put more of an emphasis on being reached via social media and other traditional media like radio/tv news/advertising is considered to be important to raise awareness (Figure 4.6). They felt that at an emergency level the government has a responsibility to distribute messaging.

Figure 4.6: Future customers – key principles for communicating (Source: Future customers and Drought overview2021)

There are key principles for water companies to have in mind when communicating with young people about droughts



4.8.3 Business customers/non – household view

To businesses the restrictions make sense, nothing feels unfair – even in the event of escalating drought. Overall the drought plan is seen as a positive document which is comprehensive and forward thinking.

There is a general feeling amongst businesses that they would happily engage with water saving measures now in the same way as domestic households. We should do more to explore and educate non-household customers. Businesses also feel they have a responsibility towards local matters as they want to be advocates of that community spirit.

Measures, restrictions and exemptions were largely felt to be fair and proportionate. The later stages of water sourcing measures appeared to be the sensible use of existing resource, however, there was an appetite amongst businesses for water recycling to be elevated in importance.

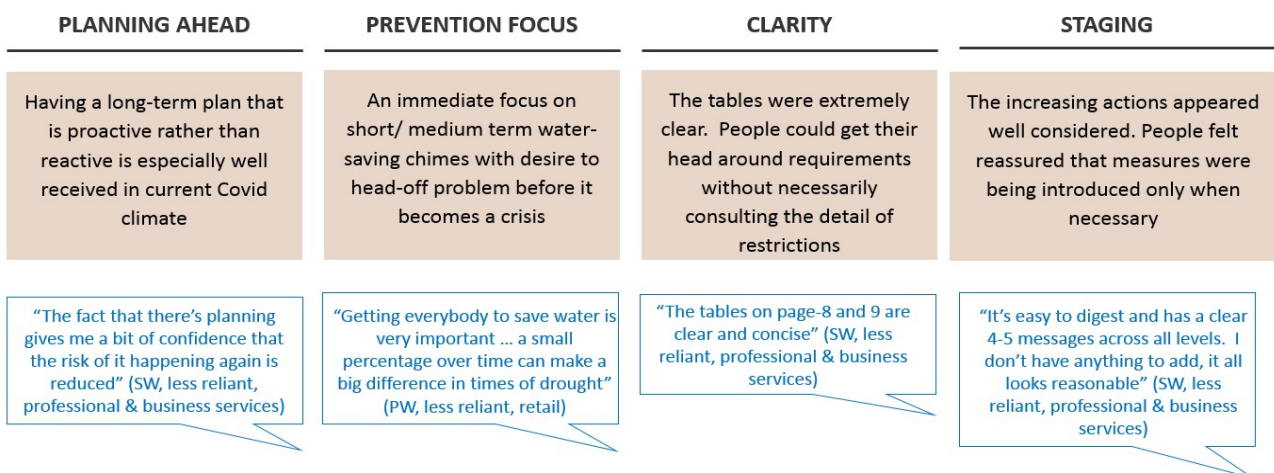
Businesses also feel that we can ask more of them in the event of a domestic ban being introduced. Business customers felt that they would naturally limit use in the workplace even when the restrictions would not affect their outputs – there is a genuine willingness to engage at any point when drought is a threat (Figure 4.7).

The measures were considered to be actionable and considered – striking a good balance between water saving and sourcing:

- Multiple measures and active initiatives seen as a positive throughout
- Later stages of the measures are largely accepted by business
- Reassured by the multiple mentions of channels of communications and availability of data
- Having a long term proactive plan is especially well received in post-Covid climate

“It’s easy to digest and has a clear 4-5 messages across all levels. I don’t have anything to add, it all looks reasonable”

Figure 4.7: Key stages to accepting measures for businesses (Source: Business Customer report – Drought Plan 2021)



Implications for Business Customers

For businesses – they want to be a part of the solution, happy to engage pro-actively and play a role in preventing these situations occurring. Reaching out directly and building relationships can only be seen to improve the dynamics of how we engage businesses and ensures we have their support around key issues. They want to do more now to help the long term issues arising.

The takeaway here is to do more now for businesses to support us as BAU rather than just during drought conditions.

Business customers
<ul style="list-style-type: none">• Social networks (professional and personal) create momentum by association• Business customers feel they have a 'ROLE TO PLAY' within their local community• They EMBRACE INFORMATION THAT COMES TO THEM, it is unavoidable• Emails or water bills can be easily ignored

“Getting everybody to save water is very important ... a small percentage over time can make a big difference in times of drought”

4.8.4 Vulnerable and diverse cultures – expert stakeholder view

Measures and exemptions were largely felt to be fair and proportionate – external stakeholders saw little reason why their clients would necessarily respond differently than other domestic customers.

However, they did identify certain groups that might struggle. For example, low-income families reliant on entertainment at home (paddling pools) or elderly more vulnerable customer who might struggle to adapt and resist change. This is why the 'how to' manage alternatives are really valuable.

They didn't see an issue with reducing water per capita consumption in the event of severe drought but need a better understanding of what this actually calibrates to – what it would require in terms of behaviour change. External stakeholders foresee that this might present real challenges to some e.g. the elderly, those in strict routines because of mental/ physical/learning disabilities but, again, expect the power of 'community' to rally and advocate forward planning to put support measures in place.

Non-essential bans were positively received but with the hope that in the event of severe drought the government would step in with benefits to support where people's livelihoods are impacted. There is also a slightly different view from these customers to future customers as the environmental care and protection measures did not naturally invite opinion – there is more of a concern for the day-to-day impact of the plan on their lives.

The Drought Plan measures have the same impact on BAME, EU immigrants, low-income customers and the elderly, as it would on other customers but how we engage with these audiences differently had become clear. We will touch on this in the communications section.

“If we say 50-80 litres to the vulnerable what does that mean, it definitely needs to be tangible, the equivalent of this or that”

Implications for vulnerable and diverse customers

For harder to reach audiences, it is about building trust and using a communication model that is tailored to their needs. Using other stakeholders to help deliver our messages can also be a real positive and help embed us within their communities. Having material that customers can relate to and engage with can be key – this

may mean that we need to explore how we distribute comms by geographical area. Use of different languages and approaches would land well. Some of these audiences can be naturally suspicious and have a lack of trust so it is vital we build this from the outset.

“Social housing people tend to be more of a community, they share information, they are very good in these situations at helping each other out they know who their neighbours are, nobody is vulnerable ...”

We can break this down into 4 key components to make sure we are maximising the implications of drought with this audience (Figure 4.8):

Figure 4.8: Considerations for communicating with vulnerable and diverse customers (Source: expert stakeholder report – Drought Plan 2021)

EXPLAIN	DEMONSTRATE (AND INCENTIVIZE)	REINFORCE	KISS
<ul style="list-style-type: none"> • CONFRONT PERCEPTIONS OF DROUGHT CAUSES i.e. lack of winter, not summer, rainfall vs. hot weather and climate change • EVIDENCE THIS with data – people expect and are now familiar with data during a crisis • ADDRESS LACK OF KNOWLEDGE (and interest) OF WATER USE 	<ul style="list-style-type: none"> • SHOW WHAT 50/80/100 LOOKS LIKE in terms of inside and outside activities • Provide range of EASY ‘HOW TO’ ACTIONS/ STEPS to save water and overcome restrictions • Ideally INCENTIVIZE HARDER TO REACH AUDIENCES with free toolkit 	<ul style="list-style-type: none"> • Water usage is second nature, it is something people DO NOT THINK ABOUT • NEW HABITS WILL BE EASILY FORGOTTEN UNLESS the messages and tactics are REINFORCED 	<ul style="list-style-type: none"> • In a drought, communication would by necessity ask people to ACTUALLY DEFINITELY DO (OR NOT DO) something • So be DIRECT • Covid style ‘Hands, Space, Face’ a familiar and established style that could be leveraged again • Information/ action should be BITESIZE • For EU/ BAME NATIVE LANGUAGE MATERIALS will increase involvement

4.9 Who we partnered with

We partnered with several agencies to ensure a wide breadth of customers were engaged as part of the consultation:

- RedC (formerly Relish) run our informed panels for both Water Futures 2030 and Water for Life – Hampshire which has been running since November 2019 and has brought us closer than ever to our customers on the challenges of resources. This gives us the opportunity to understand what household customers want/expect from us now and in the future, as well as through the Water for Life – Hampshire panel we engage on the issues in the water stressed region of our operating area.
- Yonder have been engaging on an ongoing basis with businesses who are reliant on water as an end product and helping us understand in more detail how we engage with these key audiences. They have built up a great range of depth with the different businesses we can now engage with on different topics.
- ThinksInsight (formerly Britain Thinks) were awarded MRS agency of the year and run our Water Futures 2050 panel and have been engaging with young people/future customers since October 2020. This has really enhanced how this audience taps in to our long term strategy and planning process.

Appendix A: Pre-consultation letter sent by Southern Water

Sent via email to stakeholders

Our ref

Date

05-September-2025

Contact

droughtplan@southernwater.co.uk

Dear stakeholder

Drought Plan 2027 (DP27): Pre-consultation Letter

Southern Water is beginning the development of its Drought Plan for the period 2027–2032. A drought is a prolonged period of below average rainfall. Whilst the Drought Plan is a statutory requirement, it is an expression of our desire, commitment and plan to ensure that customers continue to receive water supplies from us even during drought periods. Therefore, we are inviting your comments on our proposed approach to preparing the new Drought Plan.

The challenge

The South-East of England faces a significant challenge in managing water resources. The region is water-stressed, with a growing population, increasing economic activity and the impacts of climate change exacerbate water scarcity. Droughts are expected to become more frequent and severe, necessitating proactive planning and increased resilience in water systems.

Our response

We cannot prevent droughts from happening, but we can plan for them. We have a long history of preparing for and managing drought events in the South-East. The Drought Plan outlines our strategies for securing water supplies during drought development and recovery which we review annually. Our most recent plan, which is the 2022 Drought Plan, was published in early August 2025 and it is available here: <https://www.southernwater.co.uk/about-us/our-plans/drought-plan/>. Our Drought Plan outlines the stepped approach that we take to ensure water supplies are maintained for as long as possible in the event that drought and prolonged dry weather threaten supplies. This includes when and for how long we use interventions like Temporary Use Bans (TUBs, often referred to as hosepipe bans) and drought permits which would have a big impact on our customers or the environment. Furthermore, our Plan aims to maintain supplies for customers in an environmentally sustainable manner.

Our new Drought Plan (2027-2032)

We will write our new plan in line with the Environment Agency's Water Company Drought Plan Guidelines and associated documents, such as the UKWIR Drought Code of Practice. We will follow Government expectations and the relevant legislation and regulations. In addition, we will incorporate learnings from recent dry weather events including the summer of 2022 and spring-summer 2025. We are seeking feedback on our proposed approach to developing a new Drought Plan. We are inviting comments on all aspects of drought management and specifically on the following areas:

1. Environmental impacts of potential drought options

When we finalised our current drought plan, we did so in consultation with our environmental regulators, the Environment Agency and Natural England. Due to this summer's drought, we have prioritised work on updating environmental assessments such as the River Test Surface Water Drought Order Habitats Regulations Assessment (HRA), and we have a programme to update these for all drought options that require them. By completing this programme and working with our regulators we will fully assess our state of application readiness. Because each drought is different, we will use the most up to date data should there be need to apply for a drought permit or drought order. Permits and orders are options within our plan that, if granted, could allow us to abstract more water than would otherwise be the case. Should these options be needed, they would be accompanied by appropriate environmental mitigation or, if required, compensation.

2. Alignment with the Water Resource Management Plan (WRMP)

Our latest WRMP, which we expect to publish later in 2025, outlines a long-term strategy to secure water supplies through to 2075. It details plans to reduce leaks, increase water efficiency, and strengthen the supply network to withstand future droughts and climate change. The new Drought Plan will be aligned with the WRMP, incorporating benefits from planned schemes and reflecting the planned levels of service, including potential water use restrictions.

3. Regional planning and collaboration

We are committed to regional collaboration and communication during drought events. We already work closely with neighbouring water companies through the Water Resources South East (WRSE) group. This regional planning body has a Dry Weather Working Group (DWWG) to ensure consistent drought preparedness, messaging and co-ordinated action. In addition, we will be carrying out some modelling work in conjunction with Portsmouth Water looking at the frequency of potential drought options on the River Itchen. This work has the potential to require updates to drought triggers.

3. Learning from 2022 and 2025

In 2022, we experienced a drought that was marked by very dry January-June period and multiple summer heatwaves. Furthermore, the spring period of 2025 was the driest since 1893, with well below average rainfall, record warmth, sunshine and heatwaves¹. The events of 2022 and 2025 necessitated the implementation of TUBs in our Western area. These experiences taught us valuable lessons that include:

- The need to have an improved understanding of the timescales for implementation of certain actions.
- Making substantial updates to the Test drought permit HRA. We have taken this assessment to stage 3 and stage 4.
- Implementing a programme to regularly review and update Drought Permit/Order HRAs on a prioritised basis.

- Improvements to data sharing and drought communications.
- Learning from the benefits of demand-side measures like TUBs.

4. Drought triggers and actions

We regularly monitor the risk of drought affecting our operations using drought triggers. Drought triggers help us to detect when a drought is developing, worsening and ending. Drought triggers are derived from data such as rainfall, reservoir levels, river flows and hydrogeological, or ground water levels. We will review and validate our existing drought triggers in view of the need to ensure there is sufficient time to initiate drought mitigation measures as well as impending licence changes that will see us leave more water in the environment. Where necessary, we will update our drought triggers.

We will also review all drought management options which comprise of demand-side options (reducing water consumption) and supply-side options (reducing leakage and finding new sources of water). We intend to set out worked examples of how supplies will be managed during a drought. This includes reviewing bulk transfer agreements with neighbouring water companies, ensuring alignment with the Environment Agency's guidance on drought permits and orders, and incorporating the Consumer Council for Water's recommendations on communications and messaging.

5. Severe drought actions

Our current Drought Plan includes actions to be taken in a severe drought before implementing emergency measures like rota cuts or standpipes. These actions include:

- Enhanced hard hitting communications to encourage water conservation measures to reduce PCC2 to 80 or 50 litres/person/day.
- Provision of treated effluent for agricultural and/or horticultural use to reduce demand on public water supply.
- Removal of exemptions.
- Tankering of water by sea or road.

Questions

- What do you think should be our key considerations for us when drafting our new Drought Plan?
- Are there any particular ways of communication that you or your organisation prefer?
- Are there any key elements that you think are missing or factors that you think we should not be considering?
- Do you agree that regional groups should play a greater role in drought management?
- Are there any other lessons that could be learned from the drought experiences of 2022 and 2025?
- Are there any other drought management actions that we could consider before implementing emergency measures?

Collaboration and feedback:

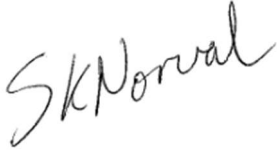
We encourage participation from organisations and the public in the development of our new plan. We welcome feedback on our proposed approach and the questions posed in this document.

Please submit comments to droughtplan@southernwater.co.uk by **31st October 2025**.

Next Steps:

We will use the feedback received to prepare a draft Drought Plan for public consultation. Subject to regulatory approval, we expect this consultation to take place in the late spring-summer of 2026.

I look forward to hearing from you in the near future.



Yours sincerely

Sandra Norval
Water Resources Strategy Manager