

# The rise of deliberative and collaborative research

Relish & Southern Water

QUIRKS LONDON 2023



# Who we are:



**GEMMA BALDWIN**

**INSIGHT DIRECTOR – RELISH & VICE CHAIR - AQR**



VICE CHAIR



**NICK EVES**

**HEAD OF CUSTOMER INSIGHT – SOUTHERN WATER**



## What we will talk about:

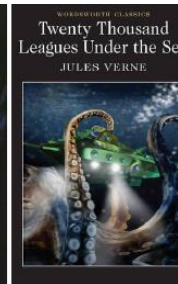
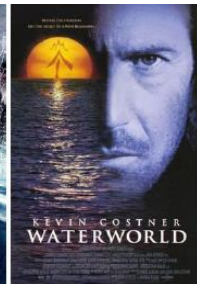
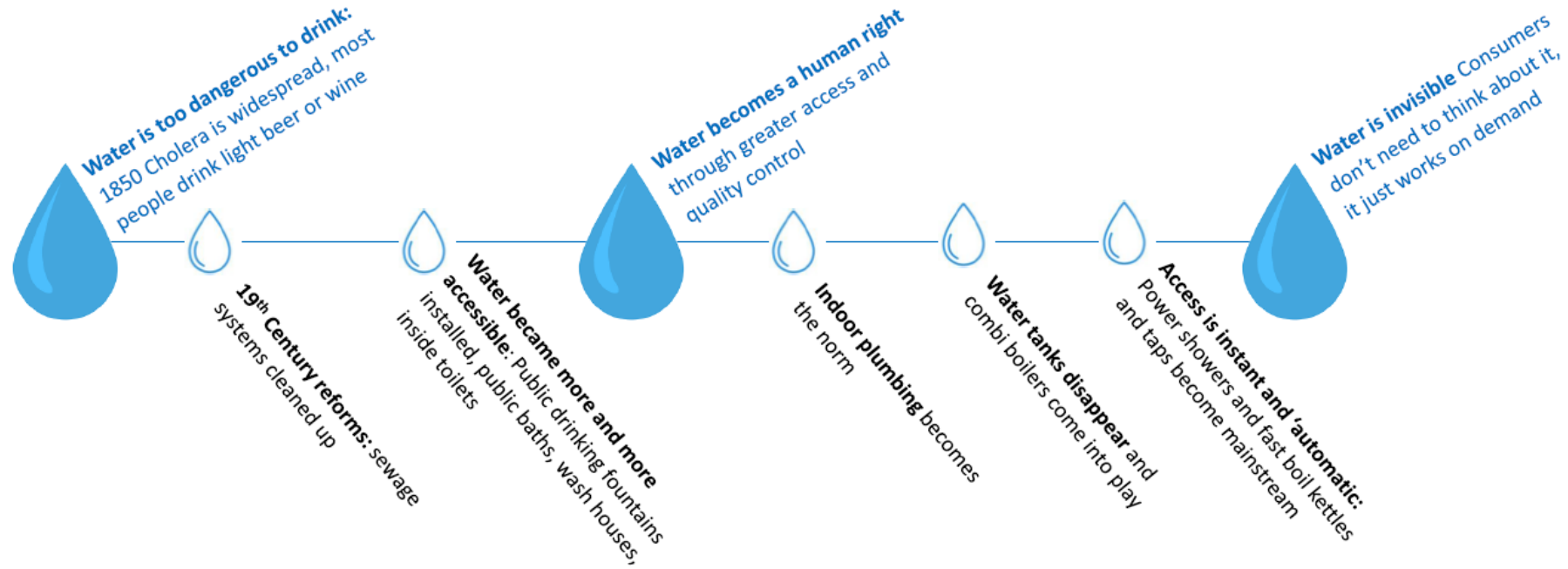
- The need for research
- Why use a deliberative approach, and what this means
- How we applied this deliberative approach
- The impact of deliberation
- The impact for southern water





## THE NEED FOR RESEARCH

# Domestic water is taken for granted because it has become 'invisible' and perceptions of 'abundance' run deep



# Despite frontline headlines last summer, perceptions of water scarcity have not changed

BBC Sign in Home News Sport Weather iPlayer

**NEWS**

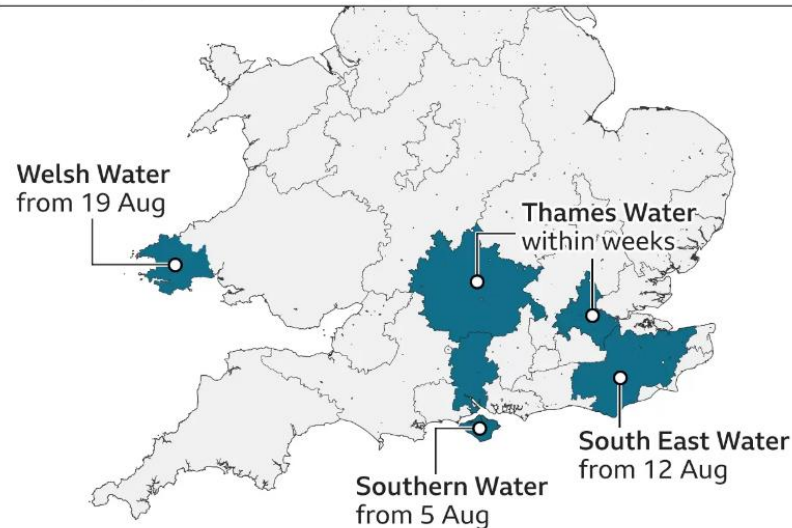
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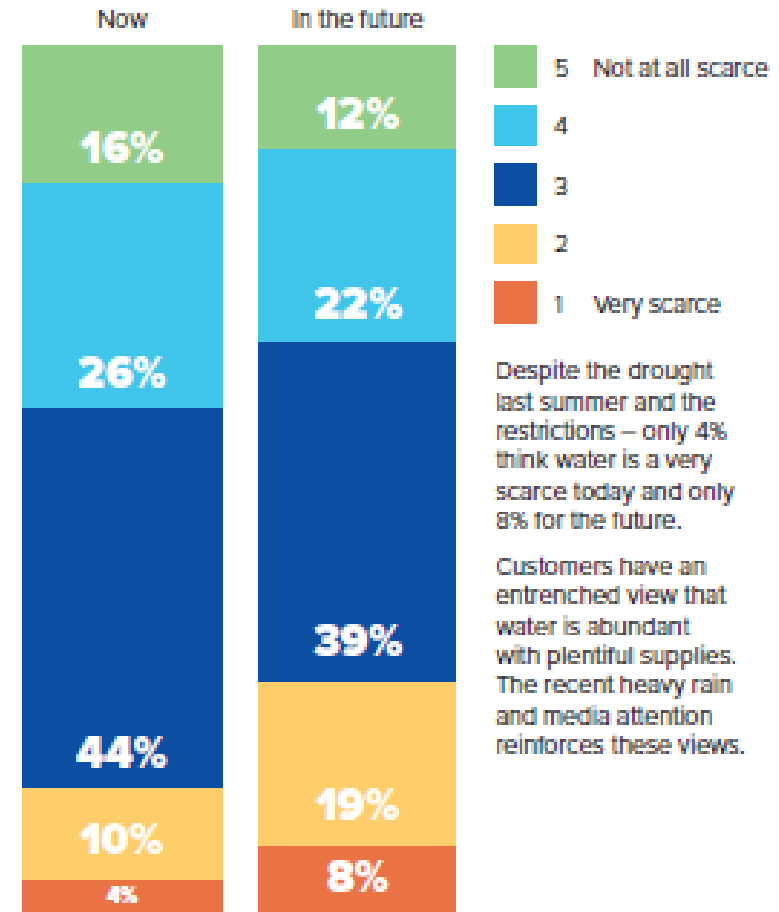
## Hosepipe ban comes into force in Kent and Sussex

© 12 August 2022

### Hosepipe bans in England and Wales



### Customer Perceptions of Water Scarcity



# However, water is scarce and we need to futureproof our water supplies

Water sources we rely upon are under threat from climate change

Reducing abstraction from the sources we use today

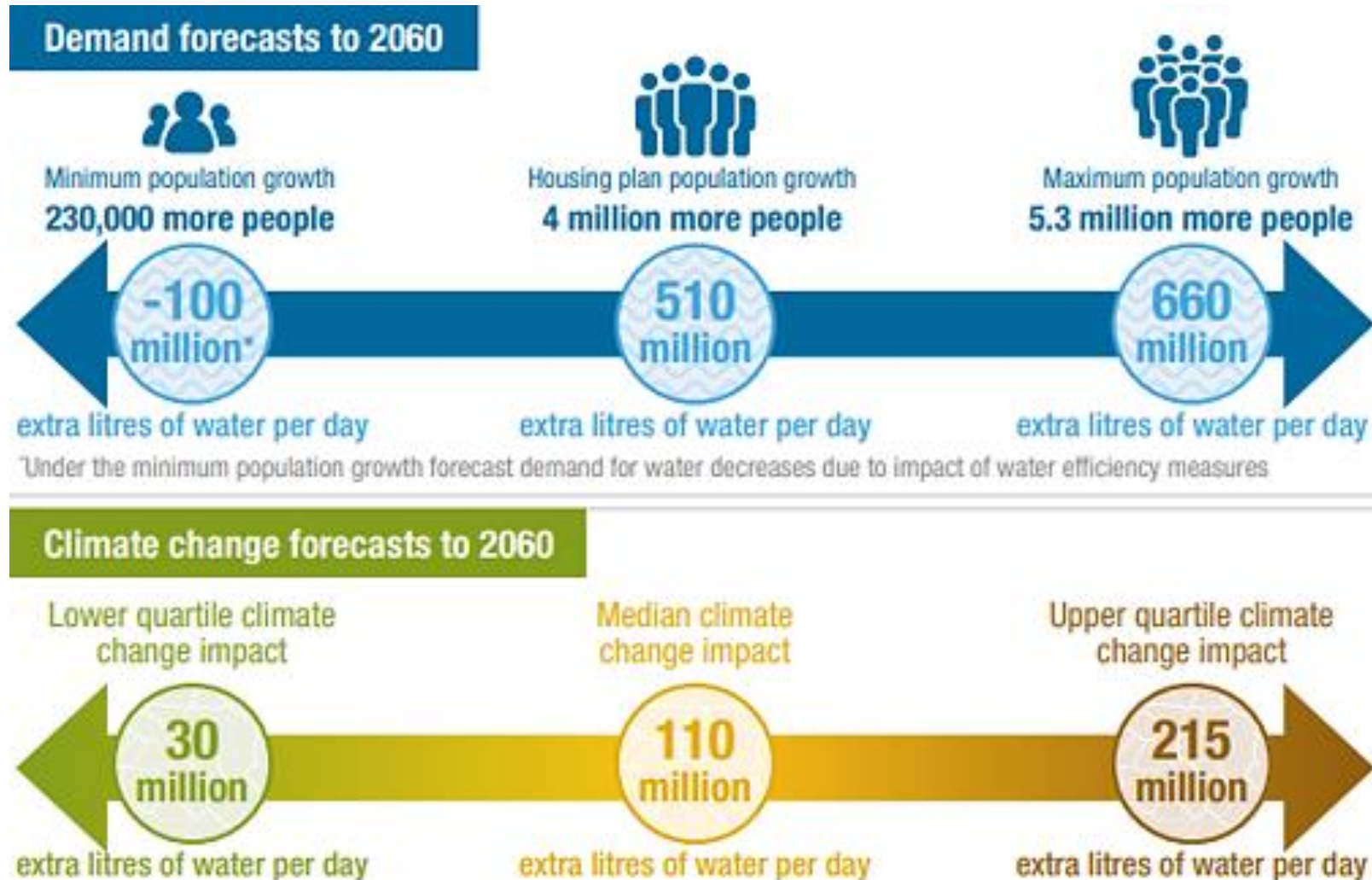
Location and size of these reductions is a key consideration

We will also need to supply water to more people





# Population growth and climate change is putting pressure on water sources in the South East





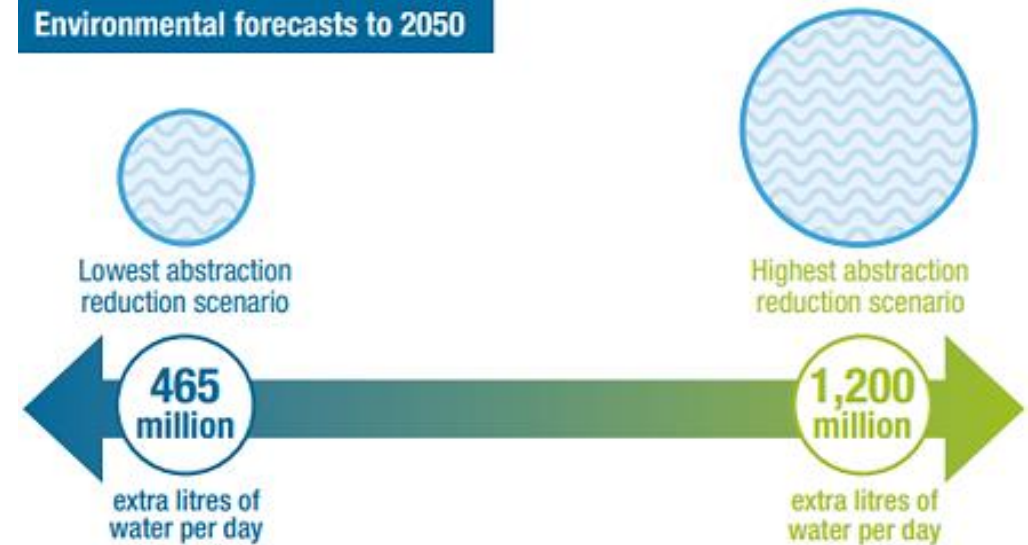
## There is growing concern for our environment – to protect and improve our natural waterways

- In 2018, the Government published its 25-year plan for the environment.
- Addressing the ecological impact of abstraction is a priority for our plans.

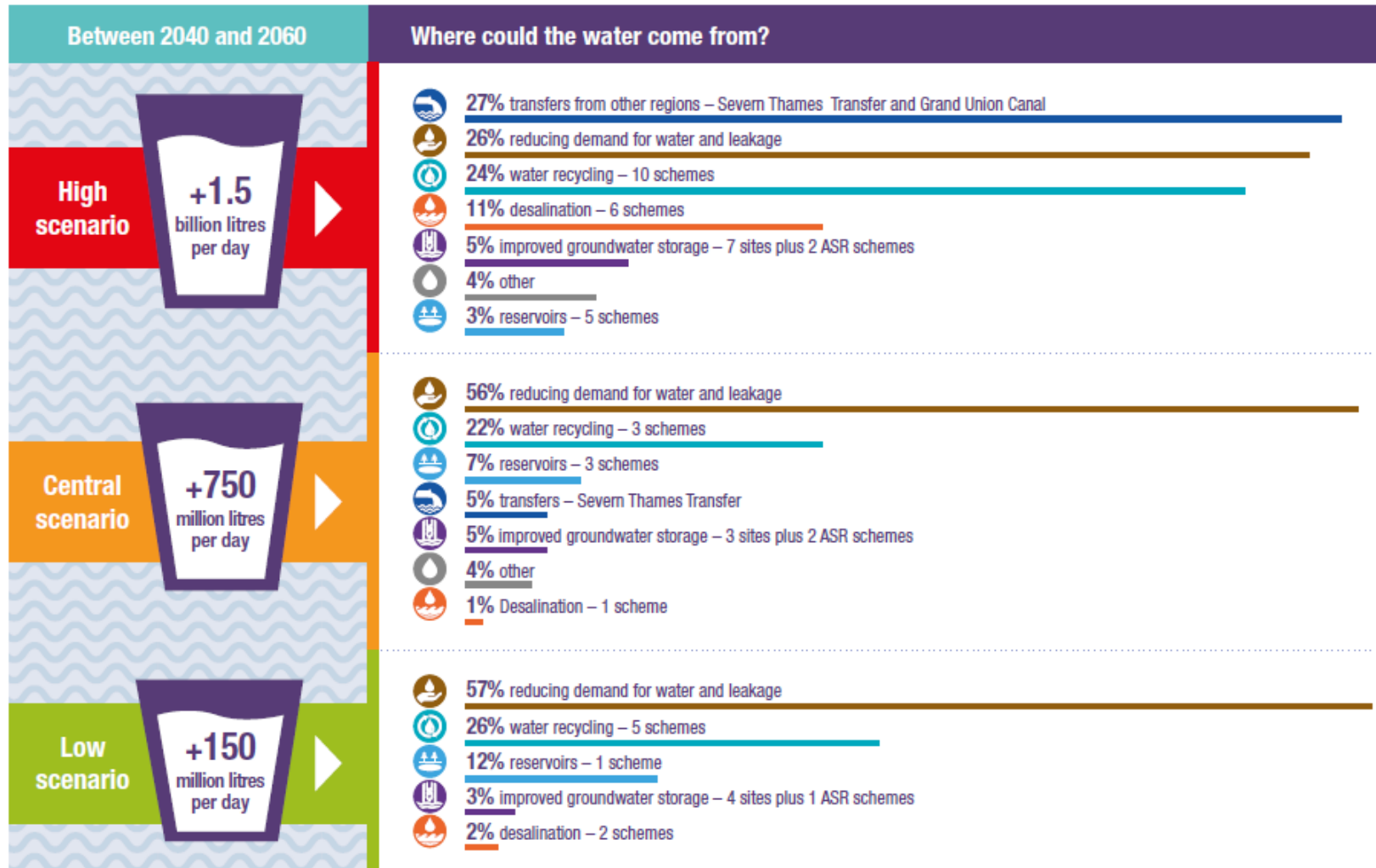


## Reducing abstraction is the biggest driver to find new sources of water

### Environmental forecasts to 2050



# Using what we already have – through reducing leaks, water efficiency can only go so far



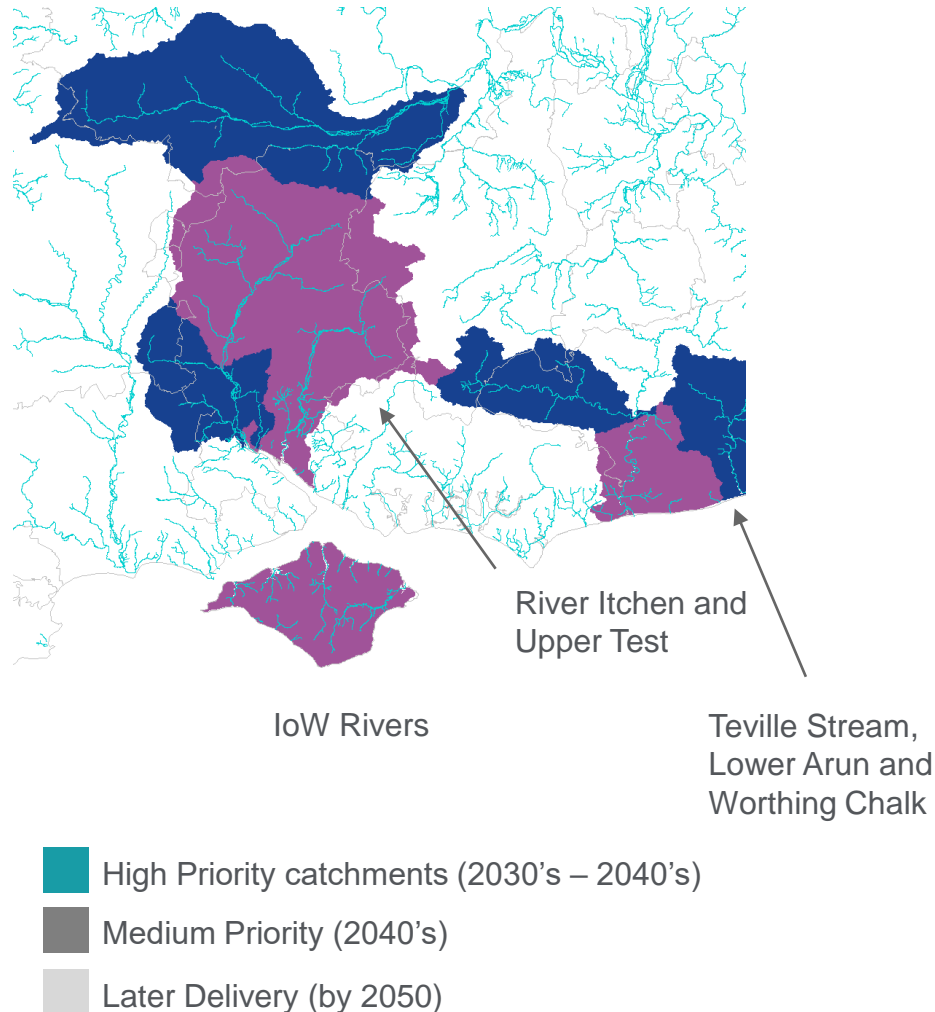
# For Southern Water we could need over 50% more water than today by 2040



**By 2040, if we do nothing, we could face a 300 million litre per day shortfall in water supplies. By 2075, this shortfall could increase to over 500 million litres per day.**



# Protecting our precious chalk streams (especially in Hampshire) means we need to act quickly

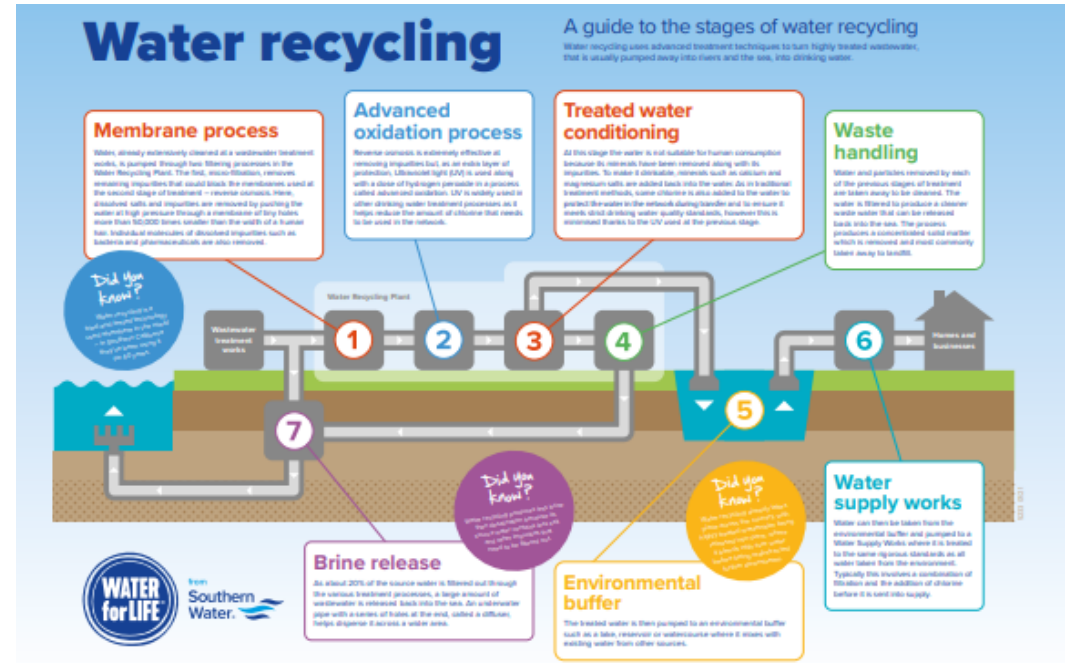
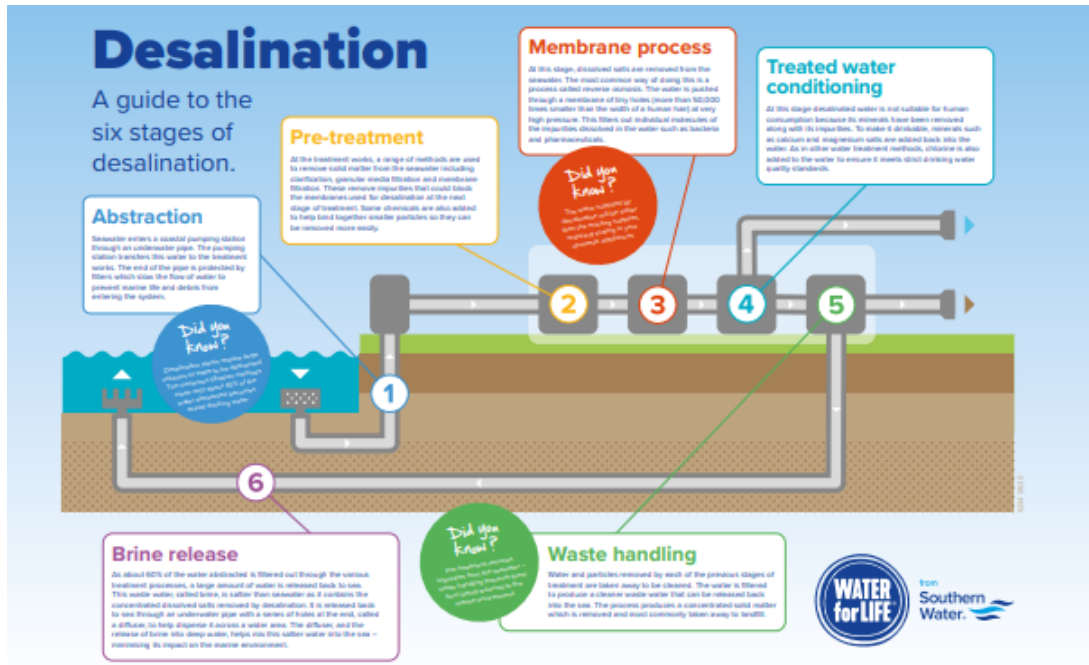


The Rivers **Test and Itchen** in west Hampshire are among the finest examples of chalk streams in the world – **rare ecosystems** that support an abundance of **wildlife** such as salmon, trout, crayfish and dragonflies. However, the twin pressures of more extreme weather events and a growing population have put strain on these rivers – threatening the wildlife these unique habitats support.

To protect Hampshire's rivers, the Environment Agency updated our licences in March 2019. The **new licences restrict how much water we can take when river flows are low**. Hampshire is now at **risk of water shortages**, especially during dry weather when water restrictions may be required.

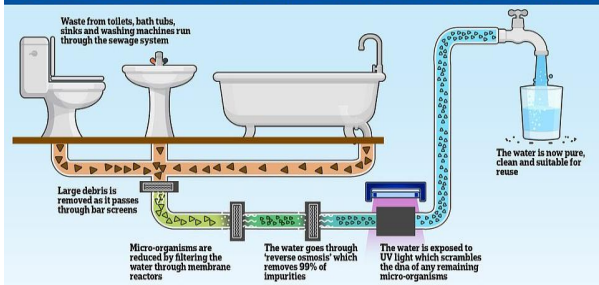
To prevent a shortage, we're **investing in new water sources** and asking customers to save water.

# Through extensive reviews of options and solutions, a new source for the UK was needed



# But new sources come with some challenges ... and these challenges are increasing

## HOW THE 'TOILET TO TAP' SYSTEM WILL WORK



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## Be less squeamish about drinking sewage water, says expert

20 August 2022



## Yuck aside, debate needed on toilet-to-tap

OUR VIEW: Some places, like Cloudcroft, began the process of active solutions, too

### Skepticism greets LA's toilet-to-tap water project

By Harrison Sheppard and Michael Coff

LOS ANGELES—Sewage water flushed by San Fernando Valley residents will one day end up flowing from faucets throughout the East Valley and much of Los Angeles as part of a new toilet-to-tap project that starts as early as Monday. The concept seems repulsive at first glance, but state health offi-



## 'Toilet-to-tap' water gains acceptance

By Patricia Buckmaster

STATE

I'm going to speak hard for this, and I hope to kill toilet-to-tap in the process. I have been hearing from...  
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NEWS POLITICS FOOTBALL CELEBS TV MONEY ROYALS

## Water company bosses told to 'swim in the mess you've made' after pollution warnings

## Millions may face hosepipe ban after England's driest July since 1911

More water companies considering move after Southern Water imposes first such ban for a decade

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## UK Heatwave: Official drought declared across large parts of England

17 August 2022

UK heatwaves

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## Environment Bill passes following lengthy battle over sewage

9 November 2021

FT FINANCIAL TIMES

## Water companies face fresh accusations over sewage breaches

Utilities found tipping into popular English and Welsh bathing spots even during dry periods, new data show



Surfers Against Sewage @sascampaigns

We're furious and we demand change.

Read @HugoSAS' response to the damning #SewageScandal report:

"The stench of environmental vandalism and rampant profiteering now hangs permanently over the water industry." 1/4

Feargal Sharkey @Feargal\_Sharkey

"The whole system is polluted by the stench of corporate greed. The tough words follow too many years of inaction and complacency by an ineffective regulator that is too cosy with companies and is hard to trust."

MONDAY 20 MARCH 2023 7:47 AM

## Ofwat clamps down on dividend payments for water suppliers who won't clean up their act



# Research was needed to feed the customer view point into the Southern Water business plan



01

Southern Water is preparing a business plan to demonstrate how it will handle water stress in the region and be ready to increase supply in 7 years' time

02

Water stress is a complex issue with a multitude of potential solutions including water recycling

03

Even within water recycling there are many options, none of them perfect, and often involving trade-offs

04

As Southern Water embarked upon the preparation of this business plan, there was a need to have an open dialogue with customers throughout, from the early stages of inception through to full acceptability testing

05

Having this open dialogue will ensure that the business always has the 'golden thread' of customer views on water recycling informing the plan



## WHY USE A DELIBERATIVE APPROACH, AND WHAT THIS MEANS





The average person knows very little about the water sector, so capturing their top of mind thoughts in research doesn't get us very far – 'just make my bill cheaper and stop creaming all the profit for shareholders' would be a fairly typical response.

But the **regulator wants customers to be at the heart of and driving decision-making** within water companies, so investment reflects what they want as customers, consumers and citizens.

**Dumbing down complex information only gets us so far** and risks missing nuances in the questions we need to pose to customers. So we need to get customers to a position in which they can make **informed and considered comments** on complex and challenging subject matter.

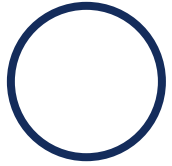


**This is why we need to run something longitudinally and asynchronously, giving customers the time and space to get INTO the weeds.**

**We incentivise them well, we treat them well, and most of them actually enjoy the experience because they feel valued and that they are making a difference.**



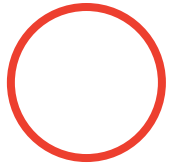
# The idea at the heart of this approach is that Southern Water customers will be involved in giving their views on an ongoing basis during the 18+ months of business plan development



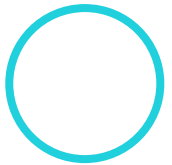
This research requires an approach in which we work closely with more informed customers, but also include the views of the less informed



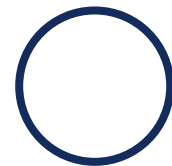
We needed to converse directly with customers and share with them our draft plans in some detail will develop an overall picture of how customers feel about what we are proposing



The feedback that we elicit from customers will be iterative, considered and informed, bringing in experts and stakeholders when needed







We needed to reach a wide range of customers, from across all 5 regions, across demographics, cultures and service type (single/dual service)



This research also needed to act as evidence to Ofwat that Southern Water is engaging with customers in a meaningful way

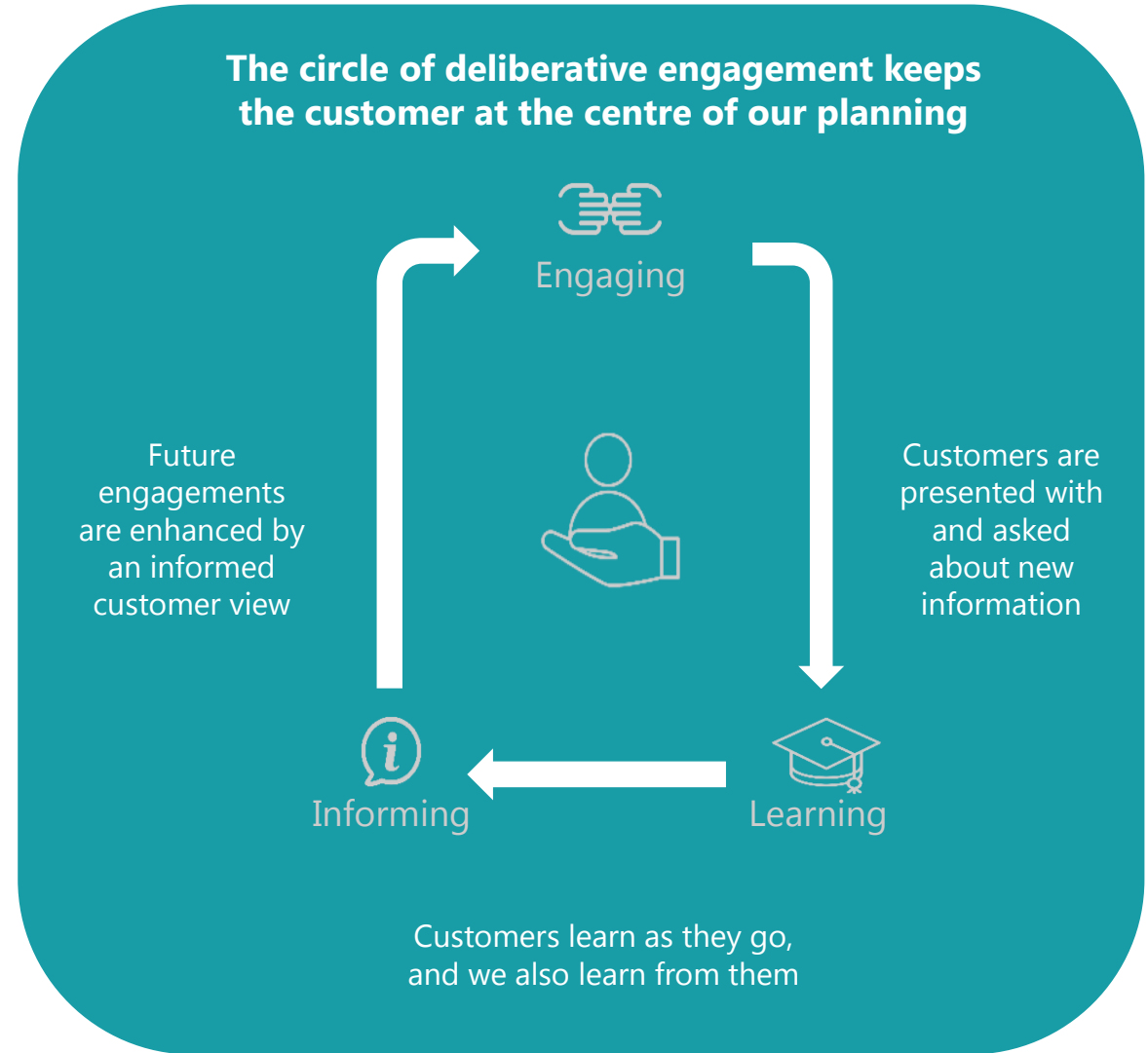


# We needed to devise a bespoke approach:

-  **We needed** to break the 18+ months down into separate phases (each of 3 months in duration), providing complete flexibility over methodology. Each phase will comprise of week long bursts of online activity
-  **We needed** a separate methodology for engaging stakeholders / hard to reach customers via 45-60-minute telephone depth interviews represent these groups in the development of the plans
-  **We needed** to include asking customers who are participating in the research to provide video responses to a couple of questions about how they have found the process and the journey we have taken them on. In order to help provide evidence to OFWAT that Southern Water is engaging with customers in a meaningful way
-  **We needed** work closely with the project team at Southern Water, and advocate a reporting framework that facilitates regular feedback from customers and a working relationship that involves close liaison and flexibility.



**By adopting a deliberative approach in which customers learn more about the issues as they go, we can spend longer with our customers, we will better understand the differences in how customers react when their knowledge and understanding increases vs where they were at when we started out with them, responses are more considered**



# An iterative approach is key:

## BUILDING KNOWLEDGE



Fundamental to our approach is that we need to be building customer knowledge as we progress – starting high level and becoming more granular as we go. Presentation of information needs to ensure that the complexities of water sector language are fully explained and that non-customer facing documentation is repackaged into a simpler bite sized chunk format for customers.

We always find that no more than 1-3 pages of (simplified) content at a time works best to maintain engagement and quality of response.

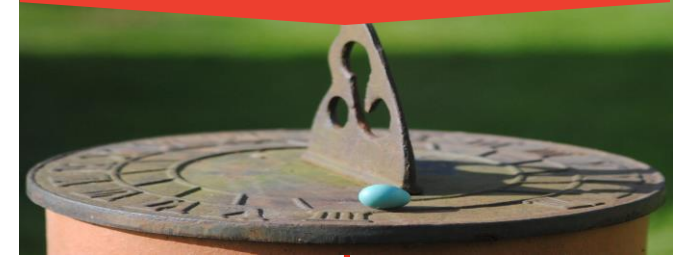
## FOCUSED CONTENT



By doing it this way, participants are only ever having to read a relatively small amount of information and can focus their minds on the content.

It also enables them to review and comment on a few such 'chunks' at a time, reflect, and come back to it later – again important for maintaining engagement and maximising quality of response.

## FUTURE FOCUSED QUESTIONS



We take great care with question and task design to ensure we are not asking about future scenarios that customers will feel unable to accurately answer because they go beyond their lifespan, and / or beyond anything they have previously experienced.

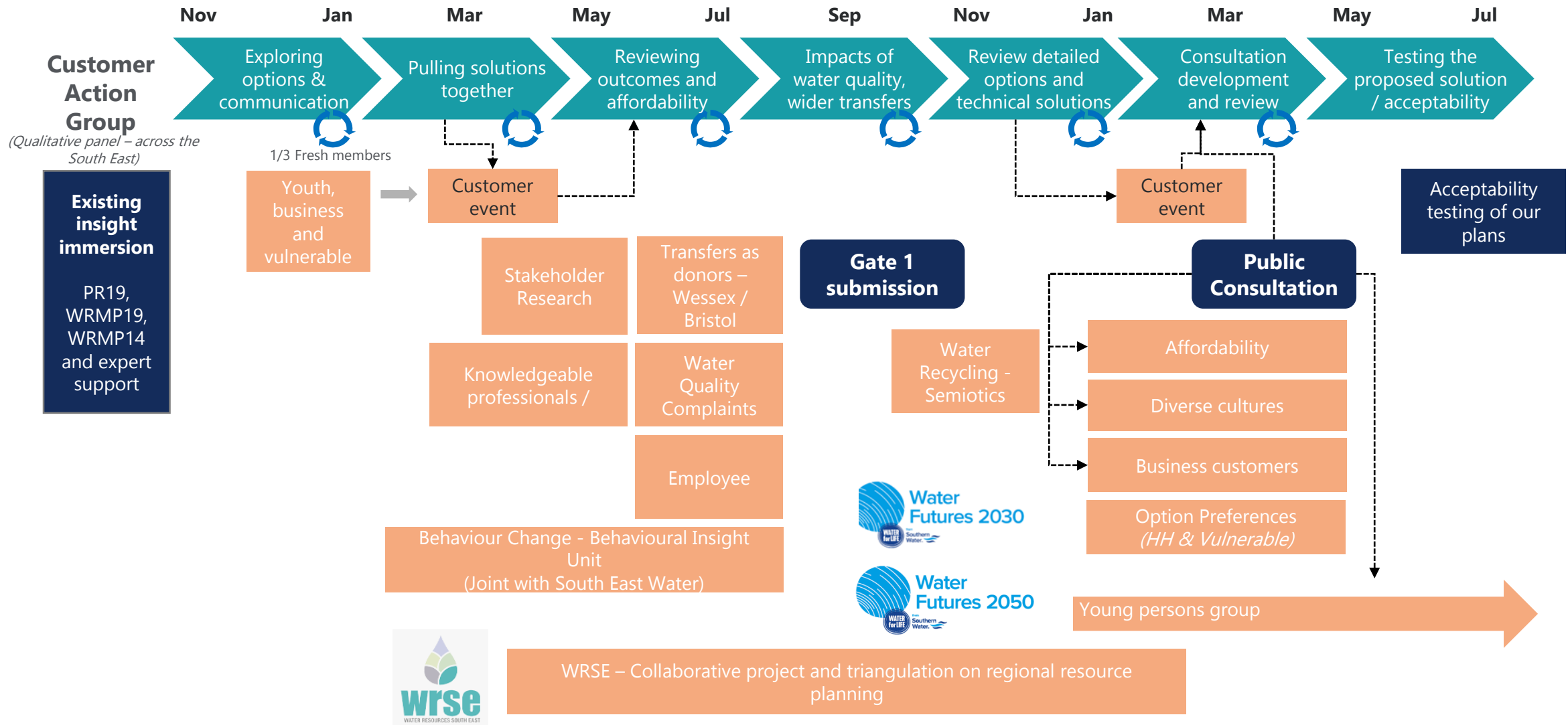
What is important is to ensure we include responses from different generations (including future customers) and focus firstly on shorter term goals and objectives, broadening this out to the future.



## HOW WE APPLIED THIS DELIBERATIVE APPROACH

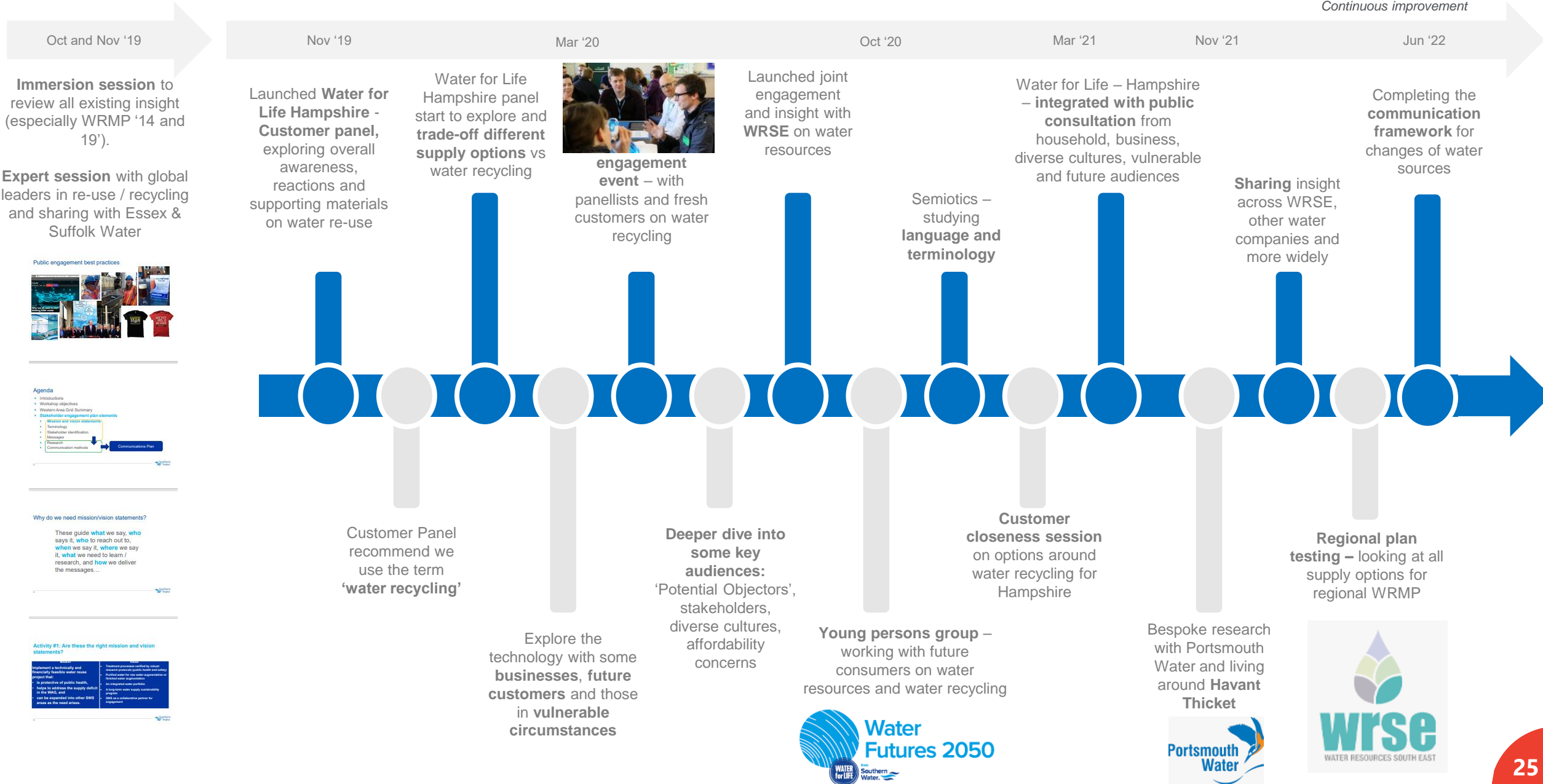


# The Water for Life Hampshire insight programme integrated different sources from multiple audiences – ensuring we have the insight we need regardless of the final solution



# Some key highlights from our insight programme on water recycling

Continuous improvement



# This deliberative approach went beyond just online interaction:



**FRIENDS & FAMILY**



**GLOBAL ARTICLES**



**IMMERSION DAYS & CEO INVOLVMENT**



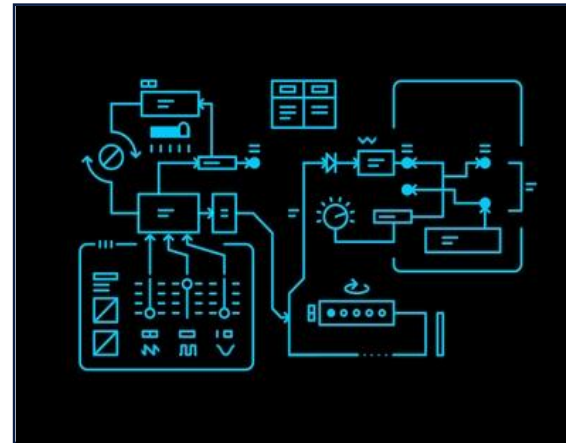
**ADDITIONAL AUDIENCES**



**WATER QUALITY**



**TASTE TESTING**



**SCENARIO BUILDING**



**ONGOING**

*e.g. Brighton University, advice sharing*





## THE IMPACT OF DELIBERATION

# We worked alongside customers to understand the challenges ...



The challenge of water scarcity is not understood. Once known, customers want to be engaged



Customers need engagement to understand the wider need

**Water is seen as abundant and has become invisible. Just 4% see water scarcity as a challenge for today.**

**Water is 'good'**



**Human**

**Natural**



**Water is 'bad'**

- ✓ Awareness of water scarcity is low and water is seen as abundant, taken for granted
- ✓ Customers have limited understanding of where their current water supplies come from
- ✓ They need reassurances over what is being done to manage existing resources (leakage and water efficiency), we need to show action from both sides

*“It rains so much, and we are an island! There is no way we could run out of water! I had no idea this was the situation, if we really are facing a shortage then water companies need to sort out leaks though too, all that clean water lost.”*

# We started with what was already available ...



It's the language and terminology that is the greatest hurdle. We need to start within the industry - including employees, experts and stakeholders.



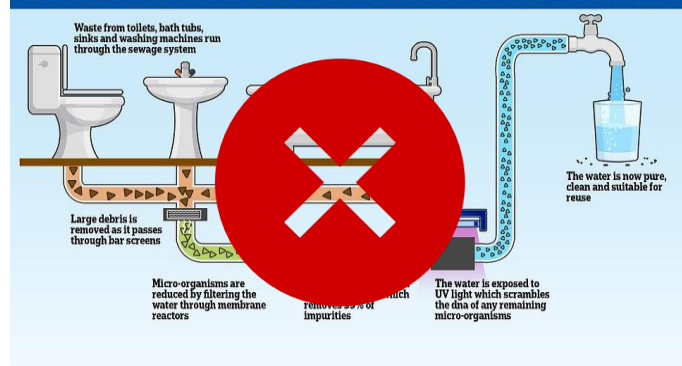
Terminology needs to be consistent across the industry

**Through immersion workshops, desk research and collaboration** - we listened to experts who had experience of both successes and previous failures, as well as using what we already had.

- ✓ Water recycling is a positive term that feels familiar
- ✓ Overly industrial or technical language is complex and loses the connection between water and the 'natural world'
- ✓ Terminology needs to be consistent across sources to reduce confusion and misinformation and to normalise



## HOW THE 'TOILET TO TAP' SYSTEM WILL WORK



“ We all know about recycling and that it is good for us and the planet, it feels like a familiar word which is reassuring. ”



# We partnered with other water companies to understand differences ...



Customers believe that water recycling is the right long-term solution for a sustainable and reliable source of water for the future



Give reassurances around wider usage

**Water recycling is consistently ranked as a higher preference supply solution.**

It makes use of what is already there, a sustainable long-term solution – addressing the challenges of scarcity and protecting our rivers from abstraction.

Over **120 reports** were reviewed and summarised

Additional engagement with over **2,700 households** and **businesses**

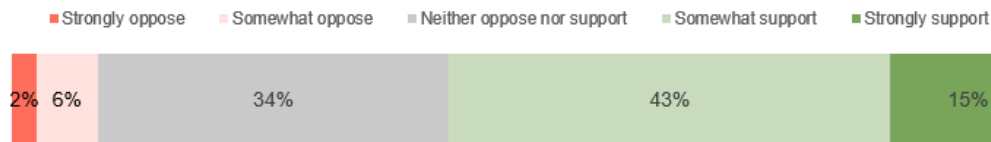


Affinity Water

south east water



Water recycling



- ✓ Initial reactions can be that of concern, when thinking about the 'waste' element of the process and treatment processes
- ✓ Simple reassurances mitigate most concerns – such as it being a proven and rigorous global technology, standards in place, environmental buffer options
- ✓ Water recycling is seen to be a logical, future thinking and long term solution to resources with lower costs and environmental impact compared to desalination

*“ I had no idea how common a process this was, if other countries are using it then it must work and be safe! Using what we have first, recycling is a way of life. ”*

# We continued the partnerships to pave the way forward ...



We need to ensure we understand the right ways to communicate with our customers so they can easily understand changes to their supply



Engage customers about key parts of the process to put them at ease

## Collaborating with water companies we developed a framework to communicate changes to water supply.

It included a review of all existing insight, taste testing, new in-depth and robust survey work across England.

- ✓ Talking about the process - we should focus on the natural parts of the water cycle (e.g. using UV, just like from the sun, environmental buffers – where relevant)
- ✓ Before changes to water sources to the home - Proactive engagement is needed and reduce concern
- ✓ Demonstrate the safety of chemicals used everyday and early work with reliant businesses

“  
*It sounds like a natural process, the more natural the better. As long as I can drink it and use it in the same way, and it tastes the same or better then that's fine.*  
”

# We spent time listening to those with in-depth knowledge ...



There are bespoke audiences that need a greater level of engagement and understanding into more of the technical aspects



Bespoke and detailed engagement for reliant businesses and expert communities

## Engaging with the most knowledgeable on water quality helps us to understand the needs of different audiences.

We spent time engaging with expert professionals (e.g. doctors, dentists and the scientific community), stakeholders, customers with current water quality complaints, businesses reliant on water for their product and consulted with communities.



*Reverse osmosis removes just about everything in the water including trace elements and that isn't so good. The question is what you have to put back into it to make it as similar to the natural environment as possible. (Nutritionist)*

- ✓ Providing scientific evidence on the technologies used, reassurances around what specifically is added to the water and how properties of the water may differ
- ✓ Working closely with health experts and agencies to ensure hospitals are well briefed and prepared on any disruption and changes to their current water supply
- ✓ Demonstrate impacts of water recycling in the long term from across the world

*My business is brewing beer, so the water properties are really important to the taste of the beer. I would need to know the properties of the water are not going to change. (Brewer)*



# Our future customers are being very clear on what they think is right ...



Our future customers challenge us to do water recycling – and ensure we do so in way that is easily scaled up



Customer want to see a long term solution that delivers on their expectations

## Working much closely with customers of tomorrow about to understand the water future they want

A deliberative panel of young customers (14yrs+) with panel discussions, focus groups, online communities and quizzes.

1

“We want change to be faster and more radical”

2

“We want our consumption of water to be fairer to the planet”

3

“We want our consumption of water be fairer to each other”

- ✓ Demonstrate flexibility to increase capacity for future generations or challenges
- ✓ Provide sustainable and environmentally friendly construction, running and maintenance
- ✓ Share justification for impacts to bills and ensure intergenerational fairness

“*We need to act now to protect future generations, we can't place all the burden on them.*”

## In summary:

- |    |   |   |   |
|----|---|---|---|
| 01 | Terminology needs to be consistent across the industry                        | ➔ | <b><i>Familiarise &amp; Normalise</i></b>   |
| 02 | Customers need engagement to understand the wider need                        | ➔ | <b><i>Contextualise</i></b>                 |
| 03 | Give reassurances around wider usage  | ➔ | <b><i>Give credibility</i></b>              |
| 04 | Engage customers about key parts of the process to put them at ease           | ➔ | <b><i>Feel natural &amp; safe</i></b>       |
| 05 | Bespoke and detailed engagement for reliant businesses and expert communities | ➔ | <b><i>Reassure over business impact</i></b> |
| 06 | Customer want to see a long term solution that delivers on their expectations | ➔ | <b><i>Future proof</i></b>                  |

### THIS WILL:

***Familiarise & Normalise***

***Contextualise***

***Give credibility***

***Feel natural & safe***

***Reassure over business impact***

***Future proof***





# THE IMPACT FOR SOUTHERN WATER



# The insight will continue to drive how we progress to customer awareness and acceptance

## Timeline

Date	Milestone
2019	Water Resources Management Plan published
2021	First public consultation on preferred strategy (desalination)
Summer 2022	Public consultation (pipeline route options)
2024	Public consultation (further technical detail on pipeline route and water recycling infrastructure)
2024	Anticipated consent application submission
2026	Consent application decision
2026	Construction starts
<b>2030</b>	<b>Strategic Resource Option operational</b>

1

**Build knowledge of water scarcity**

2

**Customer acceptance**

3

**Engage around change of water sources**



**But don't just take  
our word for it,  
hear from a few of  
our customers ...**

<https://www.southernwater.co.uk/our-story/our-plans/water-recycling-hub>

