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WORKING TOGETHER TO PROMOTE WATER EFFICIENCY ACROSS THE UK

WATER UK

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Water Efficiency And Drought Communications Report

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Supported by WWF-UK as part of our work with government, business and communities to support improvement in the use and management of water to safeguard the freshwater environment in the UK.

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1. Executive Summary

Waterwise collected information on drought communication and activities from the seven companies who imposed customer restrictions ('hosepipe bans') in the South and East of England during last year's drought. Working with Water UK and WWF, Waterwise analysed these activities to assess, whether they met their statutory drought duties and whether they had an impact on customer attitudes.

This short paper comments on these drought activities and the wider stakeholder actions on drought. It finds that the companies' action went beyond their statutory duties and that there was a lot of collaboration and co-operation between companies. It also concludes that the companies did a lot of innovative work and undertook a high degree of stakeholder engagement with a wide range of sectors.

However it also concludes that the work on drought was starting from a very low customer engagement and knowledge base and that more work needs to be done on an on-going basis to communicate with customers about water services in general and water conservation in particular.

It highlights that whilst water companies communicated well, there was a lack of central point of information about the wider drought (in terms of agriculture and environment as well as water supply) which should have been provided by Government and that bodies such as the Met Office and the Research Councils have a wider role to play here. Finally it concludes that there needs to be more collaborative working at all times, not just when there is drought, and that stakeholder engagement on water resources needs to be given a higher priority.

2. Introduction

This report is a joint report from Waterwise, WWF and Water UK on the level and impact of water company engagement activity during the drought.

The report aims to provide an overview of the water company activities undertaken around the 2012 drought, as well as the impacts of these activities on awareness and behaviours. It looks at the seven companies that imposed water use restrictions. The report addresses the following questions:

- What activities were undertaken by the 7 water companies who implemented Temporary Use Bans (TUBs) to raise awareness of the drought, inform customers of the temporary use restrictions, and encourage the careful use of water?
- To what extent did these activities meet and/or exceed the requirements of regulators and Government?
- How effective were these activities in terms of out-reaching to customers, changing attitudes and behaviours?
- How could the activities be more effective in future, and what would be the costs and benefits of additional activities?
- Should any additional activities be the sole reponsibility of the water industry or is there an enhanced role for government and the water sector (including NGOs, NDPBs, and regulators)?

Information was gathered through written submissions of material from the 7 TUB companies and from interviews with staff at the companies, in addition there were discussions with EA and CCWater. There was also a national survey of customers' views on the drought and the information provided. This report aims to provide an assessment of the activities and their impacts, it is a short report and is not a detailed analysis of the situation. The companies were asked to provide information about the activities directly undertaken in response to the drought. This included:

- Review of communications and other activities of the 7 TUB companies during the drought. Information requests to the companies covered:
- Extent of placed advert/advertorial in print and broadcast and billboards with examples of work to help illustrate the document
- The specific messages used (collectively and singularly) with examples of the work to help illustrate the document
- The distribution of water efficiency devices and information
- the level of contact with specific stakeholders (proactive and reactive)
- The number of talks, briefings and presentations given
- The number of press releases, media coverage and interviews (pro-active and re-active) during the drought
- Efforts to go the extra mile on leakage (overall performance of industry, company achievement, efforts to drive down supply side leakage for consumers)
- Specific water efficiency targeting through metering schemes
- Maximising re-use of water normally lost (mains flushing)
- Other innovative approaches to the preservation of public supplies or protection of the environment through water efficiency
- Companies were also asked to give best practice case studies to highlight specific activities.
- Each water company was asked to provide their own examples and commentary for their work, giving their assessment of how they met and where applicable exceeded their duties.

The report comments on how and whether the water companies met their obligations. The report will highlight the role and comments of statutory and other key bodies during the drought (Secretary of State, Water Minister, Environment Agency, Ofwat, Consumer Council for Water etc.), and provides a viewpoint on the contributions with recommendations for the future where appropriate.

A survey was conducted to understand if water company activities influenced customers in their water use. The survey investigated awareness of the drought and restrictions on water use, as well as water drought specific company communications.

3. Key Findings

The report found that there was a high level of activity around communications from the seven water companies. It is clear that the water companies met and went beyond their statutory duties and beyond what is indicated in their drought plans.

The response to the drought followed the process laid out in the plans in terms of timings and activities, but water companies saw this as a baseline and undertook additional activities and maintained these activities beyond the end of the drought.

There was a great degree of joint working both within and between the 7 TUB water companies. This co-ordination was much greater than in previous droughts. The water companies where possible ensured that the extent of the TUBs and the dispensations were consistent between companies, they also co-ordinated the timings of the imposition of the TUBs and co-ordinated lifting of the TUBs in groups of companies. Most importantly there was an agreed set of key messages. The companies also co-ordinated media appearances to ensure that specific people could act as spokespersons for the industry. The industry also shared resources in terms of copy, images and footage as well as funding a joint drought staff member at Water UK (the water industry trade body). This meant that there was a consistent message given to the public from the water sector.

There was a lot of stakeholder engagement by the industry, however this was starting from a fairly low base with many sectors and there is a need for much earlier and better stakeholder engagement by the water industry.

From a national perspective, there was good co-ordination between Government, regulators and the water industry and there were early drought meetings held by Government. However there was a lack of clarity over who was the national drought lead, once the focus shifted from agriculture to public supply.

There is a need for quasi-Governmental bodies to play a larger role in engaging with the public on wider water issues, these include bodies such as the Met Office, British Geological Survey (BGS) and the Research Councils.

Despite the company activity the customer research shows that people perceived the reason for the drought to be water company leakage. This highlights that there is a need to increase general knowledge around water, as there is a lack of understanding of water processes amongst the public. There clearly needs to be a national on-going campaign to promote water issues and water efficiency, so that there is a background of understanding in advance of the next drought. This was reinforced by the fact that companies had to explain to the public what groundwater is and where water resources come from. Where companies provided additional hydrological information there was a high level of public interest.

It is the view of Waterwise and WWF that water companies should look at the option of using mass media such as television or direct mail during future droughts which would enable them to provide more in depth information about the hydrology of the drought. There is a lot of academic research that shows the potential for instilling pro-environmental activity through normalised behaviour. However this requires a baseline of understanding and more information than is currently provided, the current information on water resources and water efficiency is passive and there is a need for proactive provision of information. A number of companies considered television as a medium but rejected it on assumptions around cost, however regional television adverts can start from £1,000 per 30 second slot and embedding messaging or joint commissioning of programmes can be even more cost effective and can be targeted at specific groups or topics. Likewise a number of companies looked at using mass mailing and would have used this if the drought had continued but did not act early because of cost constraints, however the drought was a significant opportunity to influence customer behaviour at a critical 'moment of change' and direct mail at this point would have had a much greater effect than at other times, therefore consideration should be given to the addition engagement benefits of direct mail during drought.

The main conclusions are that the water companies met their statutory obligations and that the drought was dealt with in accordance with their drought plans, however given the severity of the drought, there are questions over whether the level of communication set out in the drought plans is sufficient. There is also an issue that a greater role needs to be played by non-water company stakeholders and Government needs to take a lead in this area.

4. Background

The winters of 2010/11 and 2011/12 were exceptionally dry in England. This led to a depletion of groundwater reserves especially in the South and East of England. By the Spring of 2012 there were serious water resource issues for many of the water companies in the South East and East of England. This led to temporary use bans being put in place by seven companies on the 5th April 2012. After exceptional rainfall throughout late Spring and early Summer the temporary use bans were lifted by 3 companies on the 14th June 2012 and by the remaining four on the 9th July 2012.

4.1 Hydrological Drought

The unusual weather patterns between 2010 and 2012 meant that hydrological drought affected most of North Western Europe. This led to major problems for agriculture and there were water use restrictions put in place in parts of France in Spring 2012 (two departments in the Isle de France where garden watering was restricted) as well as in England. The Environment Agency observed and documented the hydrological drought and declared drought conditions in their Anglian region from late 2010 spreading to cover parts of the country from Cornwall to South Yorkshire by Spring 2012. The hydrological drought meant that the Environment Agency put in place restrictions on abstraction for agriculture and several water companies had to apply for drought permits to increase abstraction to meet public supply in a number of areas.

The difference between hydrological and water supply drought is complex for the public to understand and there was confusion over the drought status of companies such as Yorkshire who had hydrological drought in their region but no water supply issues.

There are clearly issues around how drought is communicated nationally and how bodies such as BGS and the Met Office could be more closely engaged in this process. These bodies were involved in the Government's drought group and there was some dialogue over drought messaging. However there is ambiguity over the role of these organisations going forward, particularly in relation to communicating with the public where the Environment Agency is seen as the main delivery body, and whilst this works well for communicating flood risk there is arguably a role for the Met Office in particular to highlight water scarcity and drought issues in its broadcast weather forecasts. There are discussions taking place between the NDPDs, national bodies and the research councils on this topic and it could be addressed in the new NERC drought research work.

The duration of the drought and its nature meant that there was a slow build up as groundwater recharge occurs over a long period, whereas surface water drought occurs very quickly. This meant that the stakeholders and in particular the water companies had a long run up to inform the public and liaise with each other in terms of drought communications. Many companies utilised this long lead-time to develop their local messaging and liaise with local stakeholders, however much of the inter-company liaison and discussions with national stakeholders was done at the last minute, this was partly because the Government's early drought summits were focussed on agriculture and partly because the drought planning process doesn't put a high priority on inter-company discussions.

4.2 Media Coverage

During 2010 and 2011 there was some coverage of the impacts on agriculture of the early stages of the drought. There were also two Government drought 'summits' or meetings during this period, these brought together a wide range of stakeholders and developed a series of proposals and actions that should be put in place to help mitigate the impending drought, only a portion of these actions were followed up. Whilst the Government and Environment Agency action in working with farmers was swift and effective, there were only a few water companies represented at these early meetings and the main focus was agriculture.

As the drought progressed into late 2011 and early 2012 there was increased media attention around water supply issues. A number of water companies started to increase their media activity to warn customers of potential drought.

4.3 National Co-ordination

There was much more co-ordination between stakeholders and more intra-company discussion than seen in previous recent droughts. There were several co-ordination bodies in place for various aspects of drought and Water UK had a single drought co-ordinator for the water industry. The Environment Agency led on data and scientific information around the drought, issuing regular bulletins providing drought information, these gave information on groundwater levels and river flow and were issued fortnightly at the height of the drought.

Water UK was seen as a lead for the water companies, the water industry provided Water UK with the resources to appoint a drought lead who could co-ordinate messaging, media responses and company interaction. Spokespeople from Water UK, Thames Water, Anglian Water and the Environment Agency were consistent in their commentary in the media on the water supply drought. However there was a lack of a single national lead body to talk about overall drought covering hydrological and water supply drought, this should have been the role of Government.

The Government hosted drought summits early on but they focussed on farming and did not pay enough attention to a water supply sector drought. These meetings were hosted by the Water Minister and Secretary of State and Ministers took high profile roles in explaining the drought. However, there was no central lead for information and strategy around the drought, there were a large number of committees established for specific aspects of the drought. The Environment Agency's drought bulletin for stakeholders was excellent, giving regular updates on the hydrological situation and prospects for drought. Despite this, there was no national public information around drought from central Government. In addition whilst there was communication between Defra and local authorities reminding them of their responsibilities around water efficiency there did not seem to be a standardised approach which meant that water companies had to liaise with local Government on an ad hoc basis and the response from local authorities was highly variable, with some having no understanding of their role or duties in this area and little understanding of the implications of the drought. Local Authorities have a statutory duty to promote water efficiency from the 2003 Water Act, however the accompanying guidance was never produced therefore many Local Authorities are unaware of their duties or unsure of what action to take.

5. Water Company Action

5.1 Drought Plans

Water Company Drought Plans give clear guidance that communications is an essential element of drought management and can greatly assist in conveying the right messages to customers, the wider general public, key stakeholders, and the media.

A Communications Plan should have clear objectives at its core. These should be:

- To publicise the drought situation
- To foster good working relationships with customers and local communities and give them clear water efficiency advice and information
- To develop contacts with key stakeholders to engage them in assisting with drought and water efficiency messages
- To promote the positive work the company is undertaking, separately and jointly with others, to manage the drought and minimise negative publicity or comment.

These communication elements of the drought plan should also be integrated with the wider management aspects of the drought plan.

5.2 Water Company Communications

The water companies co-ordinated the dates for the introduction of the temporary use bans, they also co-ordinated the lifting of the bans in two distinct groups, depending on how quickly their water resource situation recovered. There were also attempts to co-ordinate the scale and scope of the restrictions, although this was more difficult.

With regard to the announcement the companies planned a joint press conference to announce the bans, however there was some confusion around this with the media extracting information from one of the companies the day before the announcement.

The tone and phraseology used by the companies, regulators, stakeholders and Government was similar. This was due to a lot of coordination and one-to-one discussions by the companies and sympathetic green NGOs in advance of the announcement. The most difficult aspect of the co-ordinated approach was in relation to the actual technical specifications of the bans. Prior to the ban three of the companies agreed to provide an exemption for trickle irrigation (a gardening system that delivers small amounts of water directly to plants based on soil moisture deficit), this led to a debate with the other four companies over whether they would provide the same exemption, this was eventually resolved through discussions with the water companies, Water UK and Waterwise. But, there were still discrepancies between the companies in the treatment of elderly or infirm water users. Some companies favoured a Blue Badge approach, others provided exemptions on request and others gave general advice. In addition there were some variations on use of hosepipes by educational bodies etc. In general there was a much more co-ordinated and coherent approach to exemptions than in any pervious droughts and the level of stakeholder consultation and engagement was much higher.

The water companies all took a slightly different approach to drought communications. There were attempts to share communications resources between water companies but with a couple of exceptions, this was largely unsuccessful. Most water companies were too attached to their own branding and messaging to fully support shared resources.

All companies used their websites as effective communications tools. All companies saw a significant increase in web traffic and there were indications that customers used the web as a preferred source of information, rather than calling company helplines. Where companies used simple clear graphics to explain groundwater and drought issues, figures indicate that these proved to be the most popular form of information for customers.

A joint website www.water-watch.co.uk was developed from the 'beat the drought' website used in previous droughts. The aim was to provide a joint web resource for water companies and other stakeholders to communicate water resource and drought issues to the public. The website had links to Anglian Water, Cambridge Water, Portsmouth Water, South East Water, Southern Water, Sutton and East Surrey Water, Thames Water, Veolia Water Central (now Affinity Water), Veolia Water South East (now Affinity Water), Waterwise, Consumer Council for Water and the Environment Agency. Unfortunately the website wasn't launched until near the end of the drought, in addition the resources and support for the site have so far come from South East Water which means resources are constrained which in turn means that the website is not as interactive or live as would be desired.

There was a fundamental problem that the water companies were starting from a very low knowledge base amongst the public and with the exception of the Environment Agency and the green NGOs; there were very few other sources of information. It seems that whilst all water stakeholders were nominally engaged in the process and generally started off giving the same messages, CCWater and Ofwat's roles during the drought perhaps need to be reviewed. There was also a notable lack of participation from the quasi-Governmental bodies such as the BGS, the Met Office and the Research Councils who have duties around public education, but did not work closely with the companies during the drought (even though several attempts were made to engage the Met Office). This meant that often the water companies were left to explain the fundamentals of water supply and hydrology to the public before they could start providing messages about water efficiency and conservation and drought. In the UK there is no baseline communication of information about hydrology, water systems and water services.

During the drought Defra set up and are continuing to co-ordinate the 'Love Your River' campaign, which is well meaning but which lacks sufficient resource to be highly effectual and reach large numbers of people. Also whilst rivers are highly visible and a good way to connect with the public there needed to be more explanation of the differences between groundwater and surface water once river levels started to respond to rainfall but groundwater levels remained low. There is a role here for bodies like the BGS and the activities of all the water companies (such as South East Water's Friston borehole open day) demonstrated that there is an appetite for information on hydrology and hydrogeology from the public and media.

Some of the companies (notably Thames) maintained their water efficiency and drought information during the spell of

heavy rainfall that followed the drought and beyond, choosing to use their pre-purchased advertising slots to thank the public for their response or to highlight the long-term nature of water conservation, but many did not and despite some post-drought discussions around maintaining a nationally co-ordinated communications campaign around water efficiency (which happens after every drought), this is not likely based on the fact that the joint website (www.water-watch.co.uk) is not being supported and the numbers involved in Waterwise's co-ordinated water efficiency messaging has dropped from eleven to six companies.

All seven companies have on-going water efficiency advice and engagement on water resources and in particular Southern Water's metering programme means that for several it has a very intensive programme of customer engagement on this issue. Likewise Anglian Water has a comprehensive engagement strategy through their Love Every Drop programme. Likewise all water companies are agreed that there is a need for on-going communications around water scarcity and drought issues. However pressures on budgets mean that it is challenging to maintain budgets during non-drought periods. This reinforces the need for more co-ordinated working and for the involvement of a wider range of organisations, whilst water companies have a major role to play in communicating water scarcity and efficiency it is not solely their responsibility. However, this would require co-ordinated joint action by water companies at a regional level and securing funding for joint working is difficult and may become more difficult as competition may drive differentiation rather than collaboration (alternatively new entrants may use water efficiency as a selling point and lead to all companies delivering more water efficiency activity).

The industry was well prepared for communicating and engaging with the public during a long and protracted drought. To a certain extent the weather interfered with the drought communications, no one expected a combination of drought and heavy rainfall (although some of the companies have had previous experience of simultaneous floods and droughts on a smaller scale). Thames Water focus groups showed that the campaigns had led to a degree of public understanding of the difference between surface water and ground water.

Whether the industry would be able to respond as quickly and in such a coordinated manner in a quick surface water drought is questionable.

5.3 Joint working

There were some good examples of joint working between water companies, for example:

- The coordination on the imposition and lifting of the restrictions
- The coordination of a coherent and consistent set of rules of exemptions
- The development of a single water company web-portal for drought (unfortunately this was developed too late to be of any use but would have been invaluable if the drought had continued)
- The agreement that spokespeople from individual companies could present a joint company position to the media (alongside and/or supported by Water UK)
- Use of shared staff resources and communications materials
- There was a joint 'Climate Calm' garden at Chelsea Flower Show hosted by Southern Water, South East Water, Thames Water and Sutton and East Surrey Water; however Affinity Water had a separate garden at the show.
- A joint stand and leaflets were produced between South East Water, Anglian Water, Southern Water, Sutton & East Surrey Water, Thames Water and Affinity Water for placement in B&Q stores to promote water efficiency across the South East region.
- A joint leaflet was developed by Southern Water, South East Water and the leisure company that runs Bewl Water. The leaflet promoted water efficiency and explained about the reservoir and drought. 50,000 were printed and these were handed to visitors.
- South East Water and Southern Water sponsored the Wildlife Trust's 'Best Waterwise Wildlife Garden'.
- In partnership with South East Water, Southern Water sponsored the weather forecast on the KM Group's Kent Online site

5.4 Innovation

There were a number of innovative approaches used by the water companies, these included:

- The wide use of e-media as a communication tool, with mass email and texting of customers with drought information (only where customers had signed up for this type of contact).
- The use of poster firms to put up information posters in shops and premises (these firms are used to advertise circuses and achieve a high level of local poster coverage)
- Anglian's Water Innovation Network Drought Summit which encouraged the supply chain to come up with ideas to combat the drought.
- South East Water's Friston borehole visit which allowed the media to see the water table level down a borehole
- The wide scale use of taxi and bus advertising
- The wider use of humour to communicate drought messages (particularly by Thames and Affinity Water)
- Tweet sessions to answer customers' questions on the restrictions by Thames Water was a novel approach.

6. Drought Activity Review Survey

To understand if water company activities influenced customers in their water use, an on-line survey was conducted.

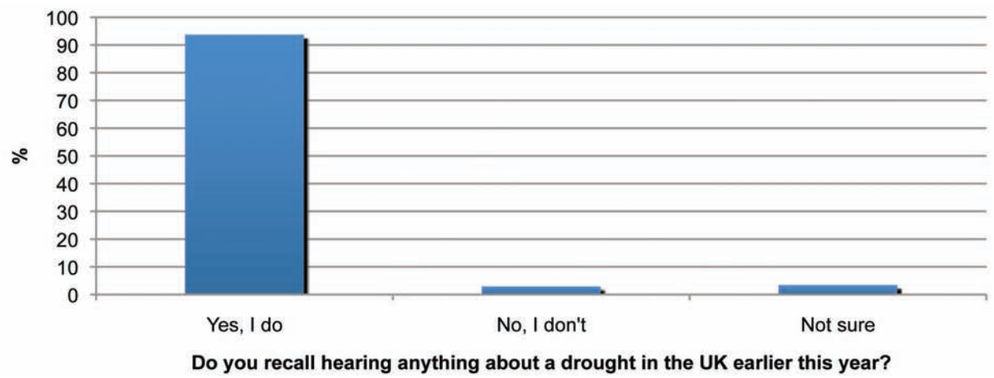
All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 2175 adults. Fieldwork was undertaken between 17th - 19th October 2012. The survey was carried out online. The figures have been weighted by age and gender interlocked, social class and UK region to be representative of adults (aged 18+). Not all frequencies will add to the base figure exactly due to the effects of weighting.

Of the 2175 adults surveyed, 768 lived within the 7 water company areas that were affected by TUBs and the focus will be upon these respondents, although comparisons will be made with the rest of the data. Where appropriate comparisons will also be drawn with the results of the CCWater survey conducted in May 2012[1] which included a number of the same or similar questions (this research was also carried out by YouGov).

6.1 Awareness of the drought

Just below 94% of those living with the affected areas (where the water companies imposed TUBs) recalled hearing about the drought. There was high awareness UK-wide with 90% of all respondents reporting having heard about the drought.

Figure 1: Awareness of the drought – 7 TUB water company areas



6.2 Sources of information about the drought

Survey respondents were asked where they had heard about the drought. The blue bars in Figure 2 illustrate the percentage of those living within the affected areas who had heard of the drought through the various sources. The most commonly reported source was the TV news, with 81% of respondents having heard about the drought via this channel. National newspapers (50%) and the radio news (44%) were the next most selected, with water companies coming sixth at 29%.

The survey also asked which of those listed was a trusted source of advice when it came to hearing about drought and other similar issues, the results of which are shown in the red bars in Figure 2. TV news again topped the list, selected by 63% of respondents. Radio news (38%) and national newspapers (36%) came next, followed by water companies (31%) in fourth.

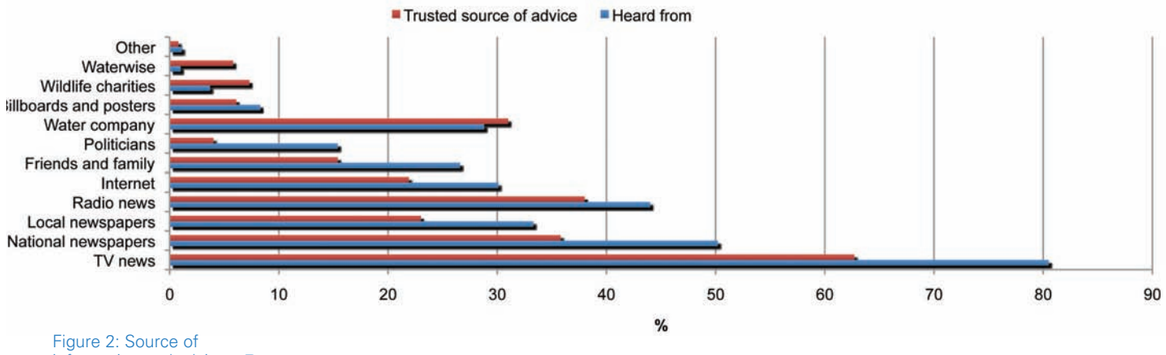


Figure 2: Source of information and advice – 7 TUB water company areas

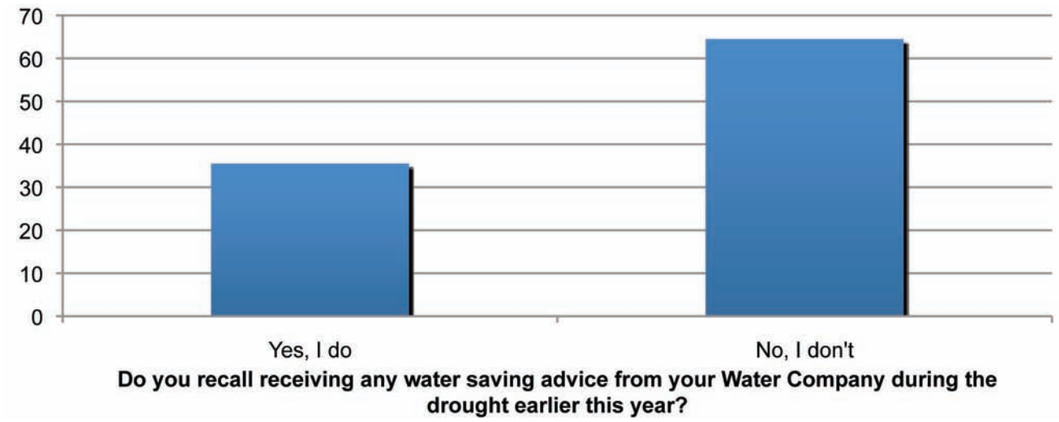
[1] http://www.ccwater.org.uk/upload/pdf/Hosepipe_Ban_Final.pdf

6.3 Advice and products from Water Companies

Around a third (36%) of those living within the affected areas (where the water companies imposed TUBs) reported recalling having received water saving advice from their water company during the drought period. As would be expected this was higher than for those respondents living in non-TUB areas, where 14% reported receiving advice, while across the UK as a whole the figure was 20%.

A small proportion of respondents reported receiving free water saving products from their water company during 2012. Figure 4 illustrates that the most frequently received free product was a cistern displacement device (7%). The red bars in Figure 4 illustrate the proportion of respondents who reported going on to use the free water saving products they had received. For the majority of products, around half of those received were then installed. Tap inserts appear to fare slightly better, and shower regulators slightly worse, however with such small numbers it is not possible to draw any wider conclusions (only 26 respondents reported receiving tap inserts, and 32 a shower regulator).

Figure 3: Receiving water saving advice – 7 TUB water company areas



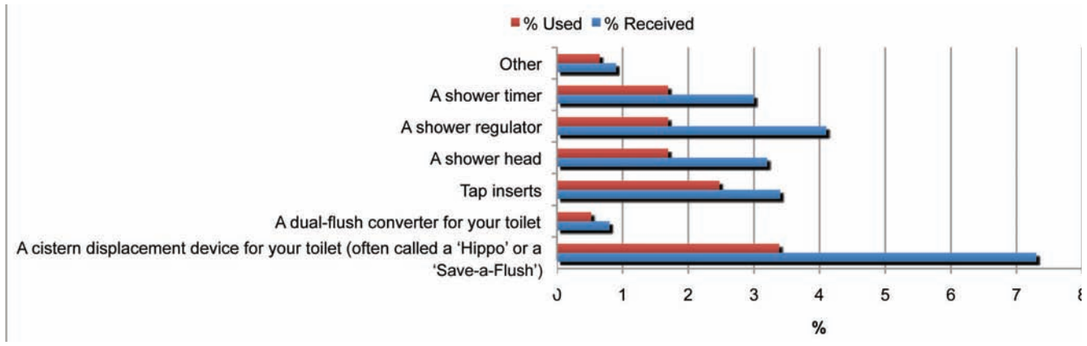


Figure 4: Receiving and using free water saving devices – 7 TUB water company areas

6.4 Cause of the drought

Of key interest was the extent to which respondents believed various factors had been the cause of the drought. Figure 5 shows that with the strongest reaction, just over three quarters (78%) of respondents agreed or strongly agreed that leaks from water pipes were a cause of the drought, while just under three quarters (74%) agreed or strongly agreed that water companies not capturing and storing rain water effectively was to blame. Not enough rain was the third most agreed with cause, at 66% agreeing in total. Farmers' use of water was the least blamed factor for causing the drought. Around a fifth (19%) of respondents selected 'don't know' for water companies taking too much from rivers, the largest such response to any of the possible causes.

Looking at all of England and Wales, a similar pattern of answers emerges, and is in fact identical when ordering the different causes by the proportion of respondents that strongly agreed with each. The top three perceived causes of the drought are the same, with 78% agreeing or strongly agreeing that leaks from water pipes were to blame, 72% that water companies not capturing and storing enough rain water effectively was an issue, and 59% that there had not been enough rain.

What people perceive to be the cause of the drought has for the most part changed little over the year. In a direct comparison with the CCWater survey carried out in England and Wales five months earlier (May 2012), Figure 6 compares the total agreement (strongly agree and tend to agree) with each possible cause. For the majority the difference is only small, a few percent one way or the other. However agreement that 'not enough rain, especially in winter, over the last one or two years' was a cause of the drought had dropped away markedly, from 77% of respondents (of 2029 in England and Wales) in April down to 59% of respondents (of 1925 in England and Wales) five months later. It is not possible to ascertain from the available data the reason for this drop, however a possible explanation is that the particularly wet summer has influenced opinions about general levels of rainfall.

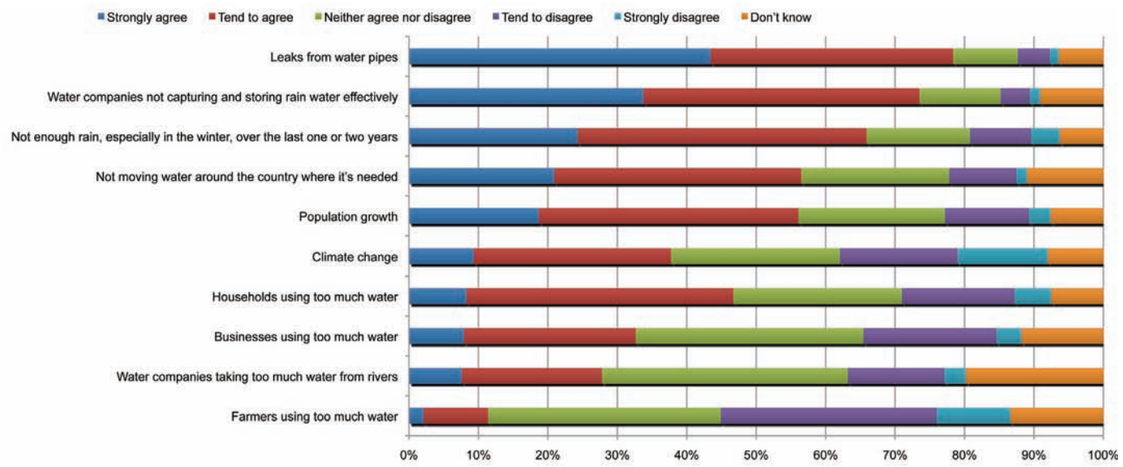


Figure 5: Perceived cause of the drought – 7 TUB water company areas

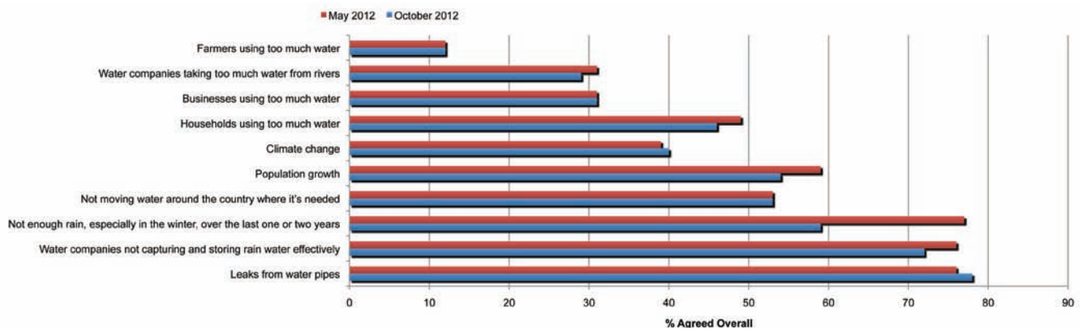


Figure 6: Perceived cause of the drought, comparing April to October 2012 – All England and Wales

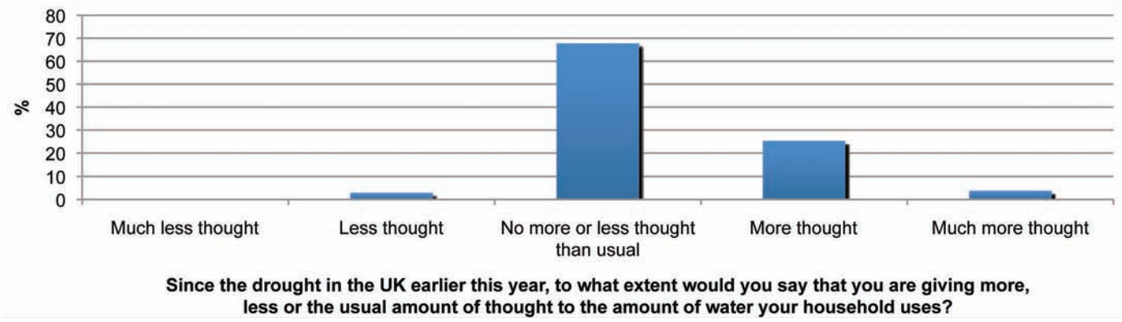


Figure 7: Level of thought given to water consumption - 7 TUB water company areas

6.5 Thinking about water consumption

Over two thirds of respondents (68%) in areas affected by TUBs have given their household water use no more or less thought than usual since the drought. However, 29% have given their use more thought in total.

6.6 Using water

Respondents were asked if they had used more or less water during the drought, and if they had used more or less water since the drought. The blue bar in Figure 8 illustrates reported water use during the drought, with 39% of respondents using less water, and 5% using much less. Over half (54%) report not changing their use during the drought, while a small minority reported an increase in use. Over a quarter of respondents (28%) have continued to use less water than usual since the drought.

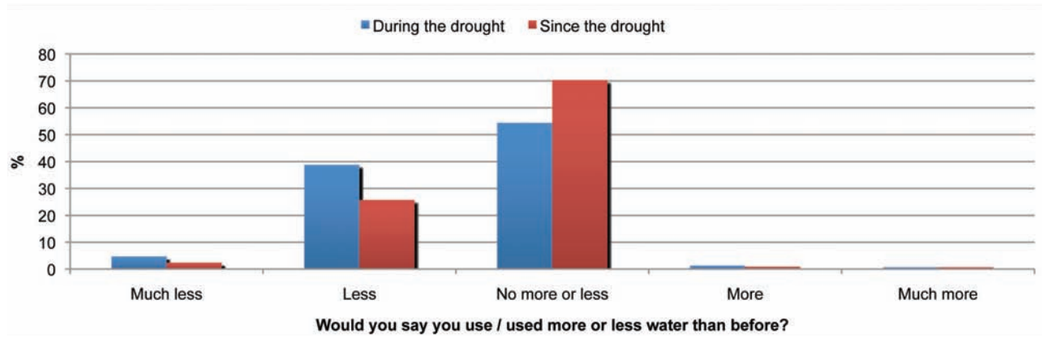


Figure 8: Using water during the drought and since the drought - 7 TUB water company areas

7. Summary Of Individual Company Actions

7.1 Sutton and East Surrey

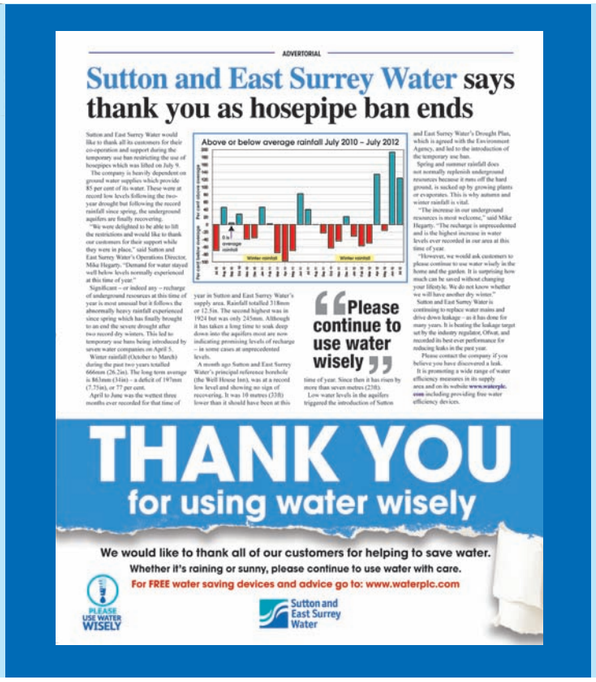
In general the company made use of augmented communications through existing channels to reach customers with the TUB message. This included messages on vans, their website, twitter and local media as well as undertaking a large number of outreach talks and providing information at their visitors centre. Sutton and East Surrey used the Thames Water format, copy and graphics for some of its materials demonstrating the collaboration between companies. The company also used water efficiency giveaways to both attract attention and to enable people to install water saving devices.

Uniquely Sutton and East Surrey held water tasting events around their supply area. This focused on water efficiency with targeted information and giveaways, there was also information on water resources, with a pictorial representation of an aquifer explaining about water levels and abstraction.

Company staff undertook a large number of talks and stakeholder visits to local interest groups. In particular they provided a lot of information to gardening groups with specific communications materials targeted at allotment owners and gardeners.

7.1.1 CASE STUDY - Thanking Customers

In July 2012 after lifting its TUB, Sutton and East Surrey took out advertorial space in the two newspapers covering its supply area. This was used to thank customers for their co-operation and support during the drought. The advertorial explained the hydrology of the drought, made the link between customer actions and resource management and highlighted the need to use water efficiently going forward. This was a clever way of reinforcing pro-environmental behaviour and showing the impact of individual actions on shared resources.


ADVERTORIAL

Sutton and East Surrey Water says thank you as hosepipe ban ends

Above or below average rainfall July 2010 – July 2012

"Please continue to use water wisely"

THANK YOU
for using water wisely

We would like to thank all of our customers for helping to save water.
Whether it's raining or sunny, please continue to use water with care.
For FREE water saving devices and advice go to: www.waterplc.com

PLEASE USE WATER WISELY

Sutton and East Surrey Water

7.2 Thames Water

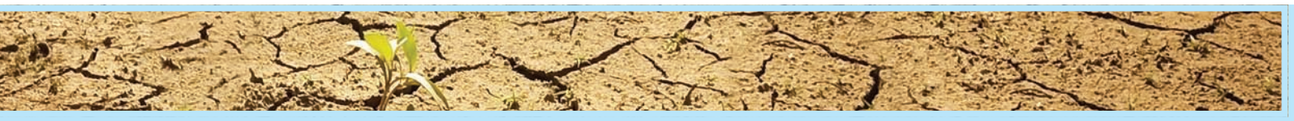
Thames Water were seen by many people, particularly those in the media, as the face of the drought. They took an early leadership role in setting the agenda, in terms of both stakeholder engagement, common messaging and alignment and co-ordination of TUBs. They undertook a lot of technical work in devising the TUB exemptions and analysing the impacts of different exemptions on both stakeholders and water resources, this was a significant piece of work.

They invested a lot of resource in publicising the drought and in drought communications. Thames made all of their drought materials available to other water companies. All advertising and messaging was based on research and fully tested with customers. The company saw this as one of the most important things they did. Customers threw out the original soft-focus advertising campaign, which resulted in something harder-edged that people would relate to and act on. It also meant that they could use humour in their communications and respond appropriately to changing weather conditions.

Thames used a wide range of media channels including newspaper and radio advertising, billboards, transport network ads, and importantly the Thames's Waterwisely website which features an interactive water efficient town. In addition they engaged employees so the company spoke as 'one voice' and gave them crib sheets to use when speaking to customers as well as sample water-saving devices to show off.

Thames did a lot of work on external affairs and played a key role in co-ordinating national drought communications, working closely with green NGOs, Government and regulators and proactively engaged a wide range of other stakeholders. Thames was involved in a lot of the political and regulatory discussions and did a lot of the 'in-studio' media work. Their stakeholder engagement has led to a number of initiatives with a wide range of sectors who have not previously worked with the water industry and these are on-going. This work means that stakeholder engagement in future droughts should be easier.

Thames had plans to continue and expand their drought communications, including a mass mailout, whilst this was revised once the weather changed Thames continued their advertising campaign beyond the end of the drought to ensure the messages were embedded with the public.



7.2.1 CASE STUDY - Thames Drought Posters

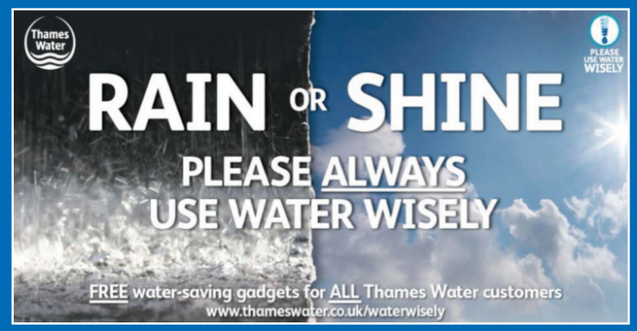
Thames Water's media strategy helped set the agenda for coverage of the drought nationally and informed the communications of other companies, the Government and other bodies. This is partly because of the national media focus on London, but mainly because of the execution of their strategy. The whole approach was underpinned by clear messages and based on constant customer feedback. This feedback loop enabled Thames to change the messaging according to the changing nature of the drought. Therefore despite the challenge of a groundwater drought followed by intense rainfall a clear message was maintained. This is remarkable given that it meant having to explain why water use restrictions were in place whilst there was localised surface water flooding. The use of humour helped with the success of the campaign.

The campaign is best illustrated through the key posters for each phase:

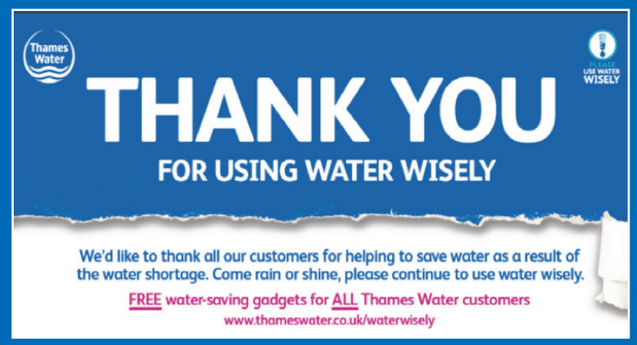
Phase 1: (above)
'We are in drought'
'None of us can make it rain – but we can all use less water. Please start now.'
The aim of the first phase of the campaign was to raise awareness and let customers know how they can make a difference.

Phase 2: (right)
'The driest two years since records began'
The second phase of adverts provided more context – showing the scene where the original close ups were taken. Following heavy rainfall in April, these ads were quickly updated with new messaging. The objective of this was to support why we were still in drought.

Phase 2b:
A few wet weeks V Two dry years
Following more heavy rainfall the messaging was updated again. Thames Water acknowledged that although they had lots of rainfall they were not out of the woods yet.



Phase 3:
Rain or shine, please always use water wisely Building on the previous message yet highlighting the need to use water wisely by adding the word always.



Phase 3b:
Thank you for using water wisely
Recognising the continued efforts to save water and promoting free products. These ads were tested at a focus group prior to going up.

Phase 4:
'It's a marathon not a sprint'
The hosepipe ban was lifted early due to exceptional rainfall, Therefore the space booked for advertising was used as an opportunity to reinforce water-efficiency messaging with a new ad, which moved away from the drought advertising demonstrating saving water isn't just for droughts – it needs to be part of everyday life.

7.3 South East Water

South East Water used newspaper and radio advertising extensively but as well as general advertising in newspapers throughout the region. South East Water identified that the Sussex supply region was the most vulnerable and developed a partnership with a local paper and ran a four month "Let's Save It" publicity campaign in partnership with The Argus, timing the start with the introduction of the Temporary Use Ban. The content was varied depending on the weather so the tips remain relevant.

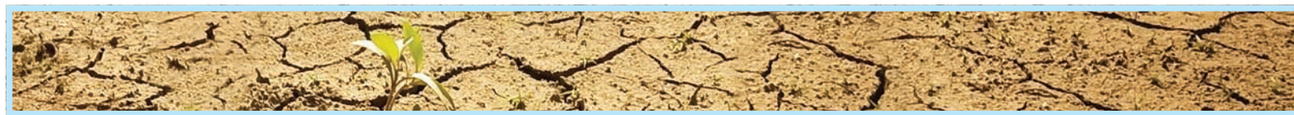
The company used a wide range of channels to promote water efficiency and communicate about the drought, such as using local council and newspaper websites, their own customer magazine, placing information on the side of their vans, community talks and they commissioned a water efficiency drama to tour primary schools.

South East Water's used their website as a major communication tool and started using twitter for the first time to put out messages and answer questions.

South East Water carried out a lot of engagement with local stakeholders and used gardening as a key route to reach customers via third parties. They sponsored the Kent Wildlife Gardening Awards jointly with Southern Water and Rushmoor in Bloom's 'Raindrops Award' for the best pre-school/ nursery project.

In addition they used direct mail, writing to 70,000 customers in the Sussex area in November 2011 who were supplied by Ardingly Reservoir and Barcombe waterworks.

As the drought progressed they added drought messages to all outgoing mail and customer communications.



7.3.1 CASE STUDY – Friston Borehole Media Day

Following a number of media requests South East Water organised a media day at Friston borehole in the South Downs, just outside of Eastbourne, East Sussex, on 4th April 2012, ahead of TUBs being introduced. This gave newsdesks a unique and unusual opportunity to descend 100ft to film at the bottom of an aquifer. This was a hugely successful media day and the invite was accepted by national and local television stations BBC News, BBC South East Today, ITN News, Sky News and Meridian Television, in addition to national and local print media. This gave journalists the opportunity to film inside a borehole, something that was vital for helping explain the importance of groundwater. The event secured widescale print and broadcast coverage.

In addition South East Water also took part in a BBC Inside Out "Drought Special" filming at Friston to assist with story of water journey from Lake District to Southern England, to demonstrate importance of groundwater recharge. This South East Water segment appeared on all English regions Inside Out programmes and was seen by 3.2 million people, and had an advertising equivalent value of £250k.

South East Water also arranged for an academic to attend the day to answer media questions on hydrogeology. This enabled much better in-depth coverage explaining how this was a groundwater drought and how rainwater recharge worked. This event was of national significance in explaining the drought and shaping public opinion and the footage and messaging was used by other water companies in their discussion with the media

This innovative case study illustrates the benefits of television coverage for explaining and highlight water resources issues and shows that television does not need to be costly.

7.4 Affinity Water (formerly known as Veolia Water)

Affinity Water was one of the companies worst hit by the drought due to their high reliance on groundwater. This meant that they had major concerns over any derogations to the TUBs and provided detailed input to the debate around exceptions to ensure an appropriate balance between fairness to customers and water saving.

Affinity Water based a lot of their advertising and communications around the generic drought communications resources produced in conjunction with Thames Water; this ensured that customers in London, where Thames and Affinity supply adjacent areas, received consistent messaging with a similar look and feel.

Affinity Water used a large amount of newspaper advertising, and had an intensive radio advertising campaign over 13 weeks, with additional sponsorship of the weather on one local station.

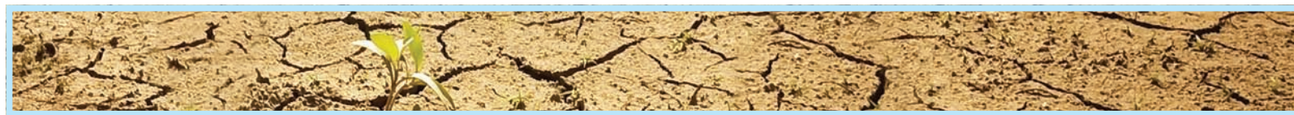
Affinity Water has a higher degree of education outreach than most water companies and has a dedicated Education Centre at Clay Lane, and this was used to full effect during the drought.

Their Water Saving Squad attends exhibitions and events. Their aim is to educate and engage with the public on water efficiency, as well as handing out free water saving devices.

Affinity Water had their own individual garden at Chelsea Flower Show promoting natural planting for water efficiency. After the show the garden was moved to the gardening college at Capel Manor to maintain the legacy.

They undertook a high degree of local stakeholder liaison, via email, print, meetings and one to one briefings.

There was a very high level of enhanced communication activity around leakage. With specific radio and newspaper adverts on leakage, in addition a film was created of Affinity Water staff showing how to properly identify leaks and report them.



7.4.1 CASE STUDY – Focus on Leakage

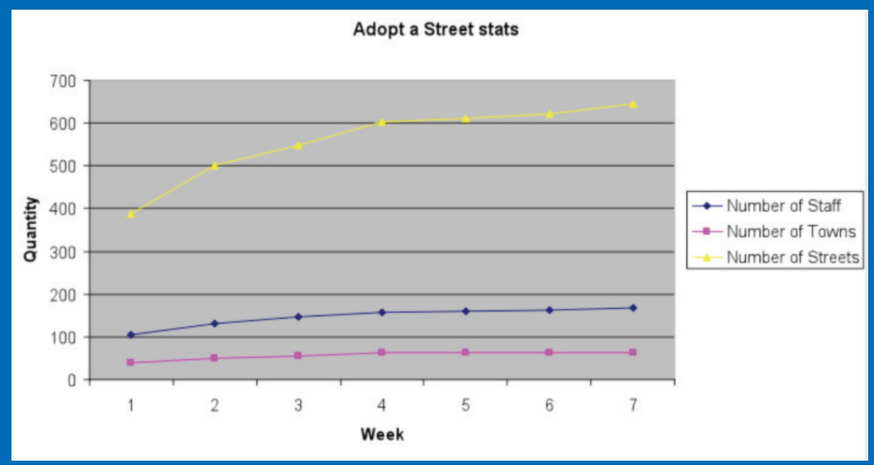
Spot the leak – internal campaign

An internal campaign was created to promote the leak spotter number to staff, friends and family.

The campaign comprised of:
- The production of banners and leaflets
- Business cards and key rings produced for staff

Adopt a Street

900 Affinity Water employees were invited to adopt a street in their local area to spot any leaks and report them and over 645 streets were adopted.



Resources
- 167 full time leak finders and 176 full time leak repairers
- Gas detection kit – inject inert tracer gas into our mains and detect where it escapes
- Hydraulic models used to trace hard to find leaks
- Further pressure management. Affinity Water installed pump control equipment to regulate the performance of the network, in particular to prevent mains bursting at night, when few people are using water.
- In 2011, Affinity Water invested £30million in finding and fixing leaks across the water mains network
- From April 2011 to the end of January 2012, Affinity Water repaired around 17,000 leaks and is on track to meet the leakage target set by Ofwat. In fact Affinity Water have seen an all-time low in leakage levels and have saved an extra 10% off the target.

7.5 Southern Water

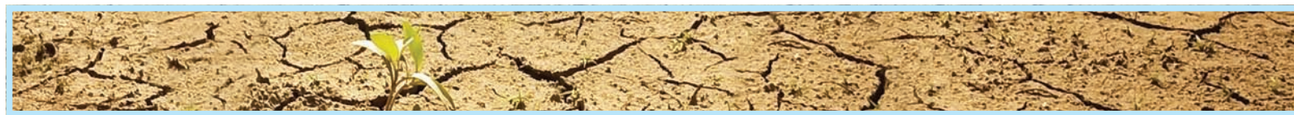
Due to its universal metering programme Southern Water already had a very high level of water efficiency and water resources engagement with its customer base. Southern Water is rolling out a programme of Universal Metering across its water supply area, supported by an ongoing, integrated communications campaign and practical water efficiency advice for customers. This is supported by a programme of briefings for local newspaper editors and regular updates to the media which results in significant editorial coverage. Water efficiency columns which focus on different parts of the home are provided to local papers and competitions for readers run in partnership with Bosch and Eco Kettle who provide prizes

Briefings are also given to local stakeholders and community representatives. This includes local MPs, council representatives, Citizens Advice Bureaus, housing associations, community groups, residents associations and charities such as Age UK.

This means that the company already has a significant baseline of water efficiency work and stakeholder engagement and they used this as the basis for additional drought communications.

Southern produced a play for local schools explaining about drought and water efficiency, they also ran a 'dragons den' style innovation competition for local schools. They worked closely with football clubs in the areas to deliver messages around water efficiency. The sponsored South and South East in Bloom, they had a joint garden at the Chelsea Flower Show. Uniquely amongst the TUB companies Southern sponsored the Gabi the Camel cartoon on Nickelodeon (only Southern and UU currently sponsor Gabi). They gave additional drought talks on top of their metering communications.

Most of the water company communications channels such as customer magazines, vans and websites already had a large amount of water efficiency information because of the metering programme so there was little need to augment this. Likewise there was already a lot of newspaper and radio coverage in the region and it was therefore easy to step this up and to make it more drought targeted, this was easier than for many of the other companies as Southern had been building stakeholder relations intensively for the past few years. In addition, a partnership with B&Q and Southern Water meant that customers were able to use discount vouchers for water efficient products at B&Q stores across the region. Southern Water expanded this partnership to include all the TUB companies and also began discussions with Homebase. An enhanced website came online during the drought with water efficient devices for free and for sale.



7.5.1 CASE STUDY – Innovative Water Recycling in Chatham

An innovative water recycling scheme helped flower beds, trees and sports pitches in Medway flourish despite the drought. Southern Water and its supplier Morrison Utility Services teamed up with Medway Council to reuse thousands of litres of water a week to nurture plants across the area.

The water came from Southern Water's Chatham Mains Replacement scheme, a programme to replace almost 50km of water mains across Chatham to reduce the risk of bursts and leaks. Before the new plastic water pipes are placed in the ground, they are placed in water containing chlorine to disinfect them for 16 hours. Usually this water is flushed directly into the sewerage system, but instead, the water was collected in two 2,000 litre containers by Medway Council. It was used to water green spaces, flower beds and sports pitches across the area. Up to 3,000 litres of water a day was reused through this innovative approach.

7.6 Anglian Water

As Anglian Water covers one the driest regions of the UK they have a long history of action on water efficiency and water conservation.

The company had already developed the 'Love Every Drop' concept that cuts across every aspect of the company. This customer facing programme meant that Anglian Water's customers had been receiving a high level of water saving information which had already done much to bolster the company's image and reputation, therefore this programme was central to their strategy and communications plan when the drought hit.

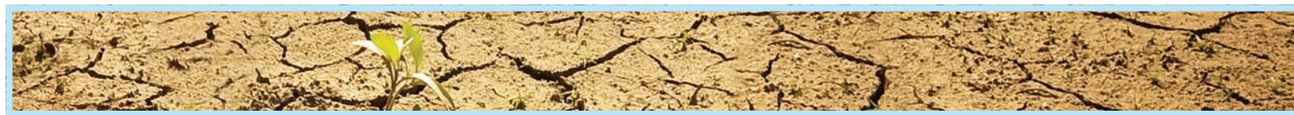
In addition the company developed the 'drop 20' brand concept, specifically for the drought. This provided an over-arching strategy that offered a unifying theme around which all communications on water efficiency and drought could coalesce. The aim was to deliver a reduction in average personal water use from 145 litres to 125 litres a day.

The company undertook a wide range of drought activity, including print, radio and newspaper campaigns, water saving posters for schools and an online downloadable education kit, and uniquely they used mass text messaging to approximately 200,000 customers in the worst affected areas, and those areas most susceptible to drought.

Anglian Water already had a very comprehensive stakeholder engagement programme around water efficiency and this was augmented for drought, including an enhanced number of one-to-one briefings and local talks.

Anglian Water along with Thames and Water UK provided most of the spokespeople for broadcast media and featured in the majority of the OB coverage. In addition Anglian undertook a huge amount of print and radio activity in their own area and nationally, where Anglian played a key role in explaining the concepts of drought and groundwater to the public. This was augmented by the use of multi-media content on their website, including an easy-to-understand video that explained why there was a drought.

Anglian provides a good example of how constant background work on water efficiency means the public are more receptive to drought messaging when drought occurs. It also illustrates how developing a single mini-brand for drought communications acts as a unifying theme that can be continued beyond the end of the drought.



7.6.1 CASE STUDY – Potting Shed

The Potting Shed project aims to change how customers and employees use water in the garden. It was a completely new garden initiative, with the intention of helping customers achieve beautiful gardens in the country's most water stressed area, during a period of drought and hosepipe restrictions.

The project comprised of:

- The Potting Shed website, refreshed monthly, to provide continued interest. Content was created in partnership with the RHS (Royal Horticultural Society) to provide water saving tips for the garden, an online plant shop to encourage the purchase of drought tolerant plants, a link to inspirational gardens in the region, and a regular update section on jobs to do in the garden each month.
- A Garden Water Savings Kit was also created, and was made available for free, and offered to all customers and employees. The cleverly branded box contained water saving crystals for mixing with compost, water storage mats to line baskets and containers, a leaflet showing how to save water in the garden and a pocket guide to drought tolerant plants. Both of these were developed in collaboration with the RHS. To date, just over 30,000 of these have been distributed.
- An event to 'launch' the Potting Shed was held at B&Q in Northampton. Media coverage was used to attract attention for the scheme throughout the summer.

Throughout the summer, at various events such as county shows, staff put on demonstrations of how to use the packs, how to create drought-tolerant gardens, and generally how to save water in the home and garden.

Throughout spring the company held a number of employee events to get them up-to-speed with the campaign, and encourage them to promote the pack throughout the region.

Customer research was used to establish if the project worked, and what impact it had on customer perceptions of the drought, and use of water. Over 1,000 people responded to the survey.

Over three-quarters (76.33%) said they had already used their garden water savings kit; almost 93% in total said they intended to use it, even if they hadn't done so already. More than four in every five people surveyed (84.15%) said the kit made them think more about saving water in the garden. Almost everyone (95.99%) said they would be interested in hearing more from the Potting Shed in the future

Potting Shed, Phase Two

Anglian will continue to work with RHS and collaborate on events and initiatives where they can. They recognise the value of having an independent and respected third-party partner for the promotion of water-efficient gardening. They will continue to offer water saving garden kits to all customers, and update the website to reflect current trends in drought tolerant gardening.

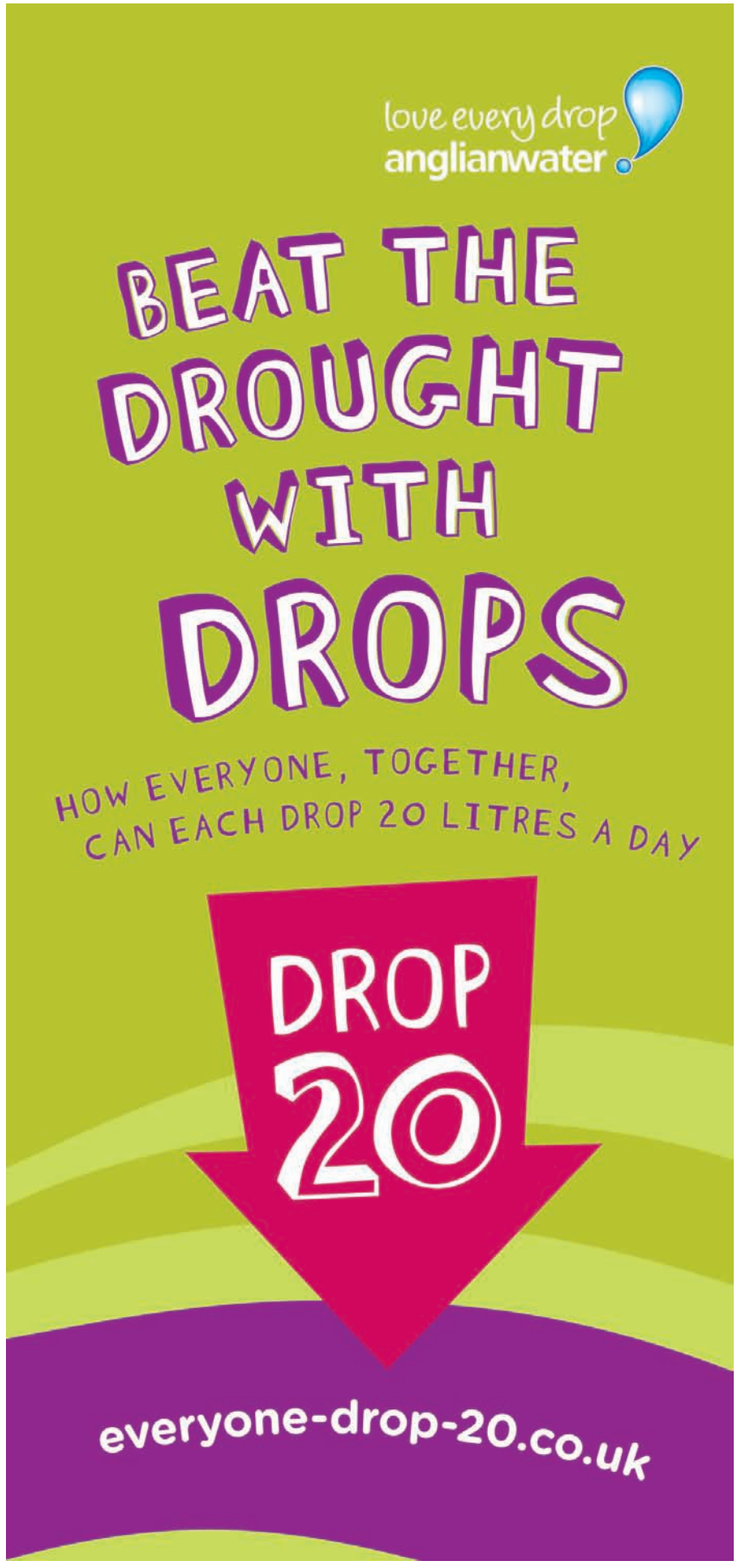
Anglian have also taken note of feedback from the recipients of the water saving garden kit. They will be amending the future product offerings based on this feedback, and will continue to communicate with those customers on a quarterly basis. These updates will include, for instance, special offers on water butts and other products.

8. Conclusions

- The activity of the seven companies who imposed Temporary Use Bans (TUB) during the drought in Spring/Summer 2012 met and went beyond their statutory duties in terms of communications and promotion.
- The actions of the companies were in line with those in their drought plans and the whole process was handled successfully, in particular there was good internal communication within individual companies, with each company having a clear command structure and a consistent message through all company channels.
- The level of co-ordination and co-operation amongst the seven TUB companies was better than that of any previous drought.
- The level of co-ordination and co-operation between the water companies and other stakeholders was better than that of any previous drought.
- The type of action varied between companies, with some having a lot of high-profile national coverage but with others focussing on locally delivered messages which were less visible nationally.
- Some innovative ideas were used for communication.
- There was some sharing of communications resources between companies both in terms of copy, but also with shared funding of staff resources within Water UK and secondments.
- There was good coordination between the 7 companies in terms of spokespersons and agreed messaging. This resulted in, inter alia, Thames, Anglian or Water UK spokespeople being able to deliver messages on behalf all the seven companies, or for the borehole footage arranged by South East Water to be used nationally. This consistency of message across the seven companies was much better than in previous droughts.
- The impacts on the public of the communications and promotion are difficult to measure but by most measures, there seems to have been a positive reaction both in terms of action and understanding.
- Whilst there were designated spokespeople for the water industry and a set of consistent messages, this was less true for the water sector stakeholders as a whole (regulators, NDPBs, Government departments and Local Government). There was a lack of a single co-ordinating body and occasionally the regulatory bodies made statements that were unhelpful in providing a clear message to the public, whilst others were almost totally absent from the media. Defra was active in bringing stakeholders together and in managing the impact on farmers but their oversight of the water supply sector was not as comprehensive.
- The work of the Environment Agency around documenting drought and producing hydrological updates was highlighted as very useful by many companies. However, the companies could have made more of the Environment Agency and Met Office data in their communications.
- Changes to the definition of drought during the drought were not seen as helpful.
- There was a need for better co-ordination with the companies which did not have TUBs in place. This applied in two directions, firstly there was an assumption by the public/media that there were TUBs everywhere and secondly there were comments such as a large-scale transfer of water from the North West to the South East which was unhelpful and seemed opportunistic.
- A lot of the co-ordination was done at the 11th hour and there were still some inconsistencies between companies in terms of the details of the TUB exemptions.
- There was a missed opportunity in terms of wider collaboration, for instance Thames shared its copy and images with other water companies but the use of other logos on the images (other water companies, Met Office, EA, and NGOs) would probably have added credibility and showed that this was a wider issue.
- There was also a missed opportunity for greater collaboration with commercial partners. There was some work with B&Q around vouchers and communications but this was on the back of previous work done by Southern Water. There are some discussions that have been on-going since the last drought in 2006/7 with various sectors about sharing information on drought triggers so they can communicate with their stakeholders, these discussions had little urgency in non-drought times.
- A higher background level of water efficiency and demand-side knowledge amongst the public would have made drought communications easier.
- There was a high level of communications activity by all companies but Waterwise and WWF believe that the use of direct mail should be considered in future droughts and that the role of television should be looked at as a long-term communication tool to establish a baseline level of consumer engagement.
- Leakage and perception of leakage is still the industries' Achilles heel in terms of water efficiency and drought communications.
- The role of communications staff within water companies means that communications can often be seen as an add-on. Water companies should review whether communications around water efficiency should be a constant on-going high level activity that is linked to the water resource planning process.
- Given the slow onset of the groundwater drought communications should have been stepped up a lot earlier than they were, (this is obviously an economic decision and is related to the level of baseline activity).
- There seems to have been a rapid drop-off in awareness and engagement from the public which demonstrates how weak the background knowledge is and how long it will take to establish a baseline of knowledge to establish a water saving culture.
- In general the media were responsible and supportive in their reporting of the drought, this is partly due to the fact that there were few inconsistencies between companies for them to highlight or criticise.
- Companies followed their drought communications plans.

9. Recommendations

- The drought highlighted the need for a longer-term approach to water communications and for communications around water scarcity to start as soon as companies are aware of an impending drought.
- There is a need for multi-stakeholder dialogue before the next drought, this needs to be facilitated by a third party.
- The drought highlighted the need for better planning between water companies and better communications co-ordination between all water companies, including those not affected by a specific drought.
- The use of alternative non-potable supplies should be looked at further and the dialogue with users should be continued.
- There is a need for a wider Government role to help co-ordinate all sectors and stakeholders.
- Quasi-governmental bodies such as BGS, the Met Office and the research councils should assess their role in communicating about drought and wider hydrological issues to the public and should be more receptive to working with water companies.
- There needs to be more action to publicise the work water companies are doing around leakage and to address the mismatch between customer's opinions and the economic level of leakage
- There is a need for a dry run (so to speak!) of TUB implementation to ensure consistency of message, stakeholder engagement and water company interaction (particularly between TUB and non-TUB companies) is arranged well in advance of the next drought.
- There urgently needs to be a well-resourced and constantly updated industry source of information on water resources (this could be web-based). This could use an existing body such as Water UK or be a new site or be a single portal for water company, NGO and academic sites. This could act as a resource for stakeholders, the media and the public.



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