

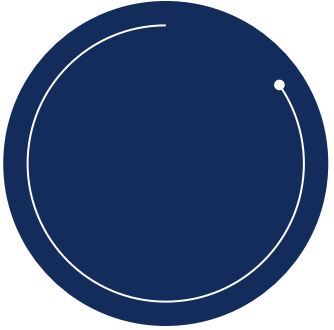
Drought and TUBs: Customer research report

Prepared for Welsh Water

October 2022

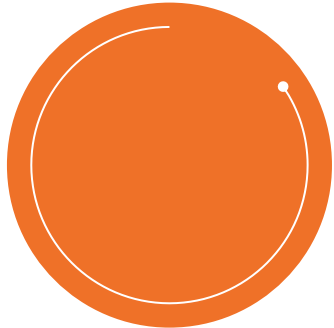


Research background and objectives



On 19th August a **Temporary Usage Ban (TUB) came into force in Pembrokeshire and parts of Carmarthenshire**, impacting over 60,000 households. The ban will remain in place until there is enough water to replenish water resources.

The ban was lifted on October 25th.



In order to inform future TUBs, there is a need for Welsh Water to understand:

- Public perceptions of responsibility for management of water resources
- Household and Non-household views towards drought and TUBs
- The impact of drought and the ban on water-related behaviours
- How the ban has (or hasn't) affected daily lives of those living within the impacted region
- Awareness of relevant communications from Welsh Water.



Research approach

In order to help Welsh Water better understand the views of their customers and the impact the TUB has had, Relish were commissioned to conduct a two-stage research project:

In-depth qualitative interviews with 5 x households and 5 x businesses living in the impacted area

45 minute one-to-one interviews conducted with both domestic and NHH customers to assess understanding and impact of drought/ the TUB.

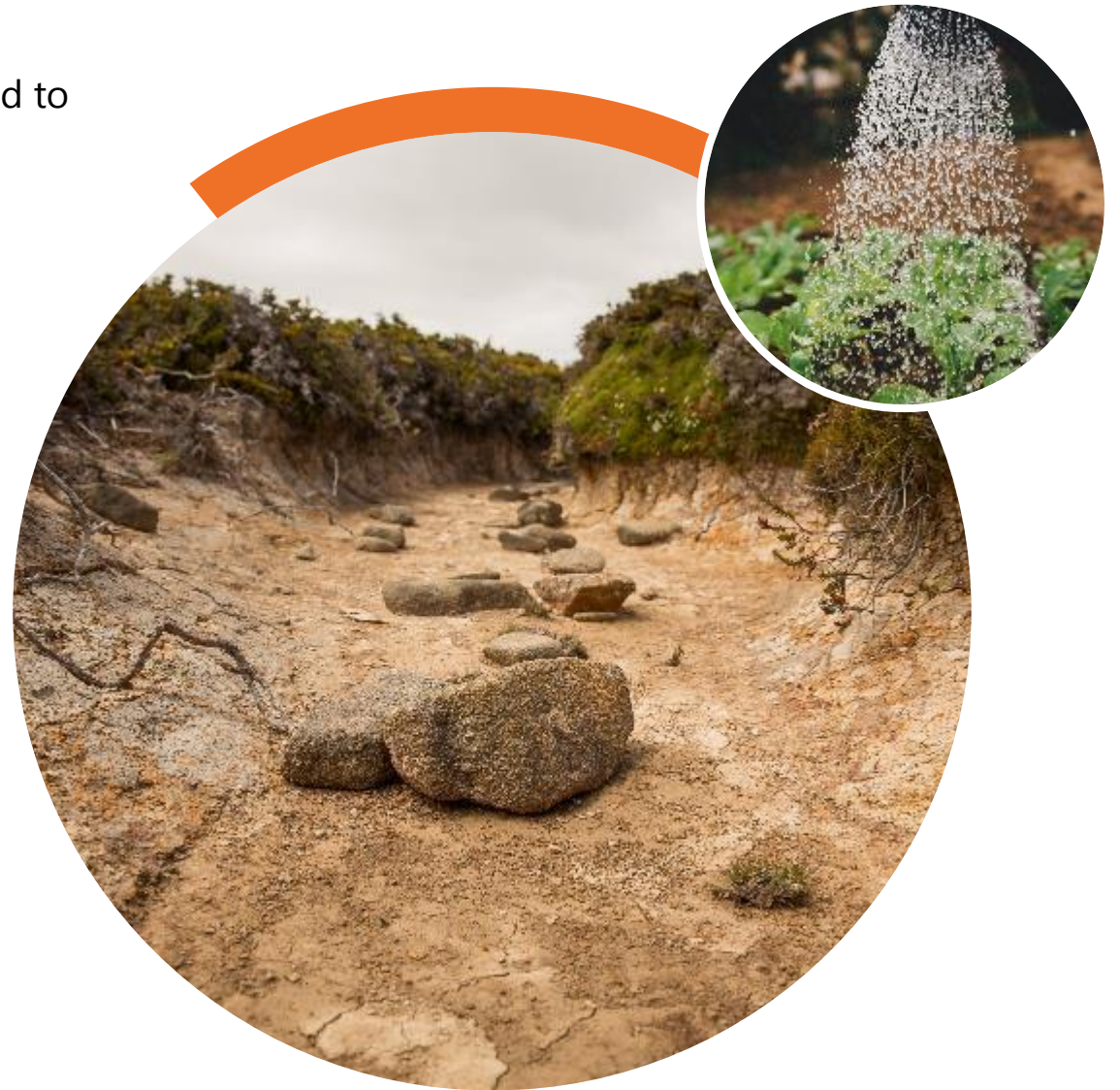
- All recruited from affected areas of Pembrokeshire / Carmarthenshire.
- All business sample reliant on water in some way for the operation of their business e.g. farming, scuba diving, holiday site.

A quantitative online survey with impacted and non-impacted household customers

A sample of **n=503 household customers**, representative of Welsh Water's customer base, who completed an online survey covering:

- Awareness of and attitudes towards drought and TUBs
- Impact of TUBs on water usage and behaviours
- Impact and awareness of messaging from Welsh Water on water use

n=97 customers living within the area impacted by the TUB completed the same survey.



This debrief will cover...



**ATTITUDES
TOWARDS
DROUGHT**



**AWARENESS OF
DROUGHT AND
TUBS**



IMPACT OF TUBS



**MESSAGE TESTING
AND COMMS**



Attitudes towards Drought

There is a high level of understanding that drought means 'dry weather', which is understood to be increasing given the impact of climate change

*Drought is a **long period of no rainfall** causing water shortage*

*I think of low water levels and **reservoirs drying up when I think of drought**. Dry and hot conditions affecting the water resources we have available for consumption I guess.*

*When there is **no rainfall and hot temperature conditions***

*That we experience **little to no rainfall over a certain period of time** and extreme heat conditions*

Overall, there is a high level of understanding that drought means '**dry weather**'. The word 'drought' has negative connotations, and discussions around it are framed by its consequences.

Customer's frame of reference is images of cracked land in other countries where crops are unable to live, therefore in their mind it feels extreme to describe the situation in the UK. However, **customers realise that this is now the reality here** – drier, hotter weather can be more than just drought and can result in things like wildfires, too

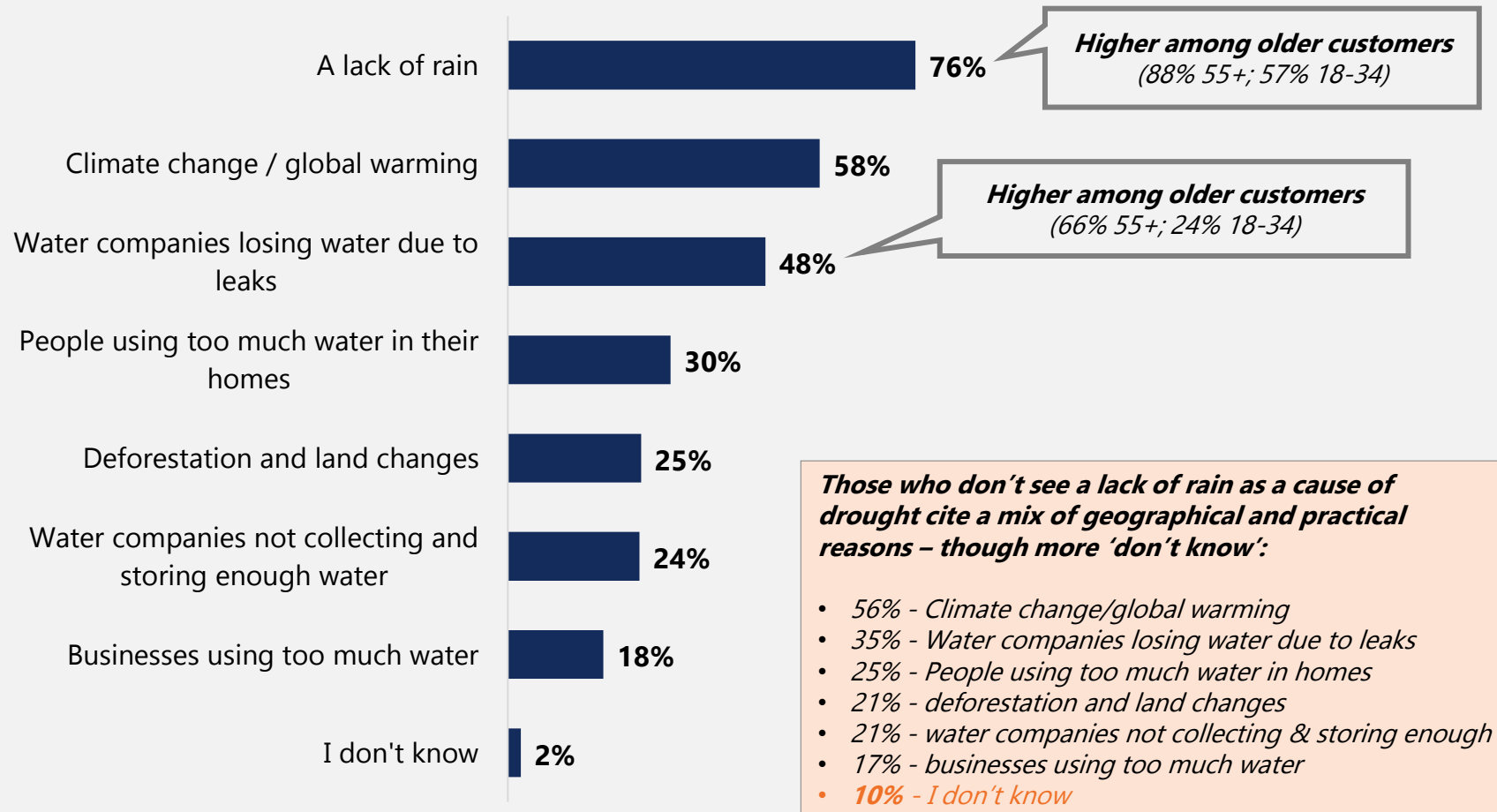
Some can feel a shift as a result of this changing climate, which they understand means that **more frequent droughts and usage bans** is the direction we are heading in.

'Drought' implies that **people will suffer and behaviours need to change** in order to combat it.

In line with this, over three-quarters state that drought is a result of low rainfall with awareness of climate change as a contributing factor

Causes of drought

Welsh Water customers



However, there is a degree to which drought in the UK is almost 'expected' with comparisons to previous heat waves such as 1976

While the reality of climate change is understood, **drought can also be expected to simply 'happen' attributed to cyclical weather patterns, or natural peaks and troughs in temperature.**

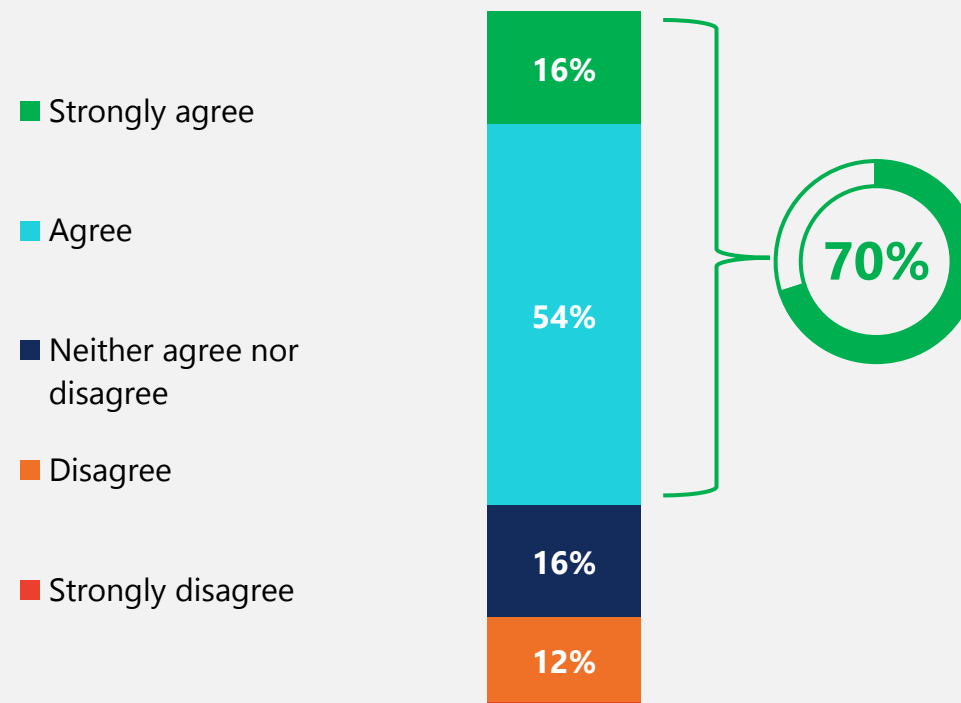
With comparison to e.g. 'the heat wave of 1976' – a sense among some that this year has not been as warm or severe as others

I understand that climate change is absolutely real, but I'm old enough to remember the really hot years like 1976 - Household

We had hosepipe bans when I was a child in the 70's, and they were worse than this - Household

Perceptions of drought

Welsh Water customers



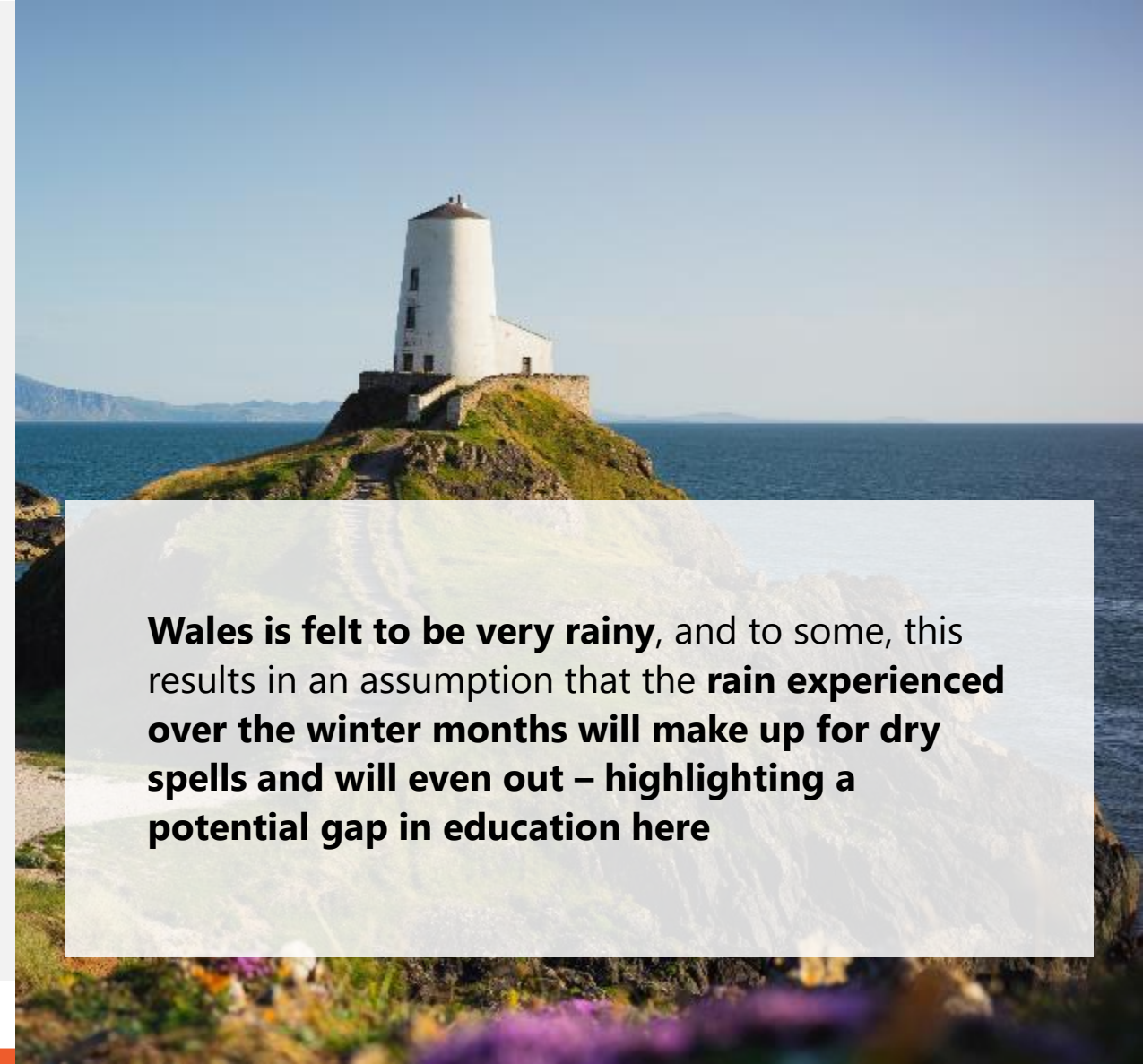
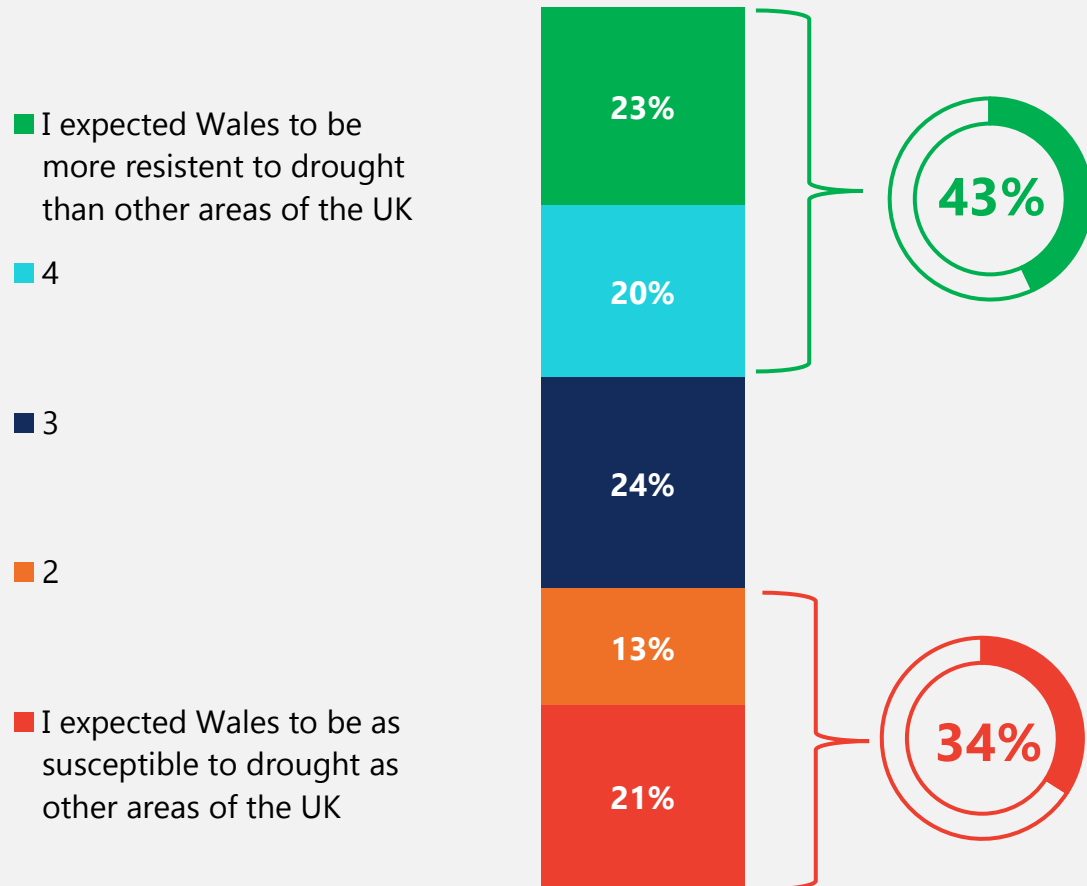
'Drought is to be expected in hotter months in the UK'

No significant differences across subgroups

Some – although not all – expect Wales to be more resistant to drought than the rest of the UK due to its frequent rainfall

Resistance to drought in Wales

Welsh Water customers



Wales is felt to be very rainy, and to some, this results in an assumption that the rain experienced over the winter months will make up for dry spells and will even out – highlighting a potential gap in education here

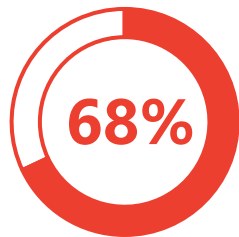
Regardless, the damaging consequences of drought are well understood and there is a strong sense that it is not taken seriously enough



📍 The **visible effects of drought** in the past few months – e.g. **parched fields, low reservoirs and exposed river banks** have **hit home**; a **stark and concerning** reminder of the affects of drought

📍 **Pressure on the water supply is more understood in Pembrokeshire** where the water supply is **already heavily impacted by tourism**

📍 For Household customers – recognition that most personal impacts are relatively minor (**dry lawns, and wilted plants**) ; but that the wider impacts are more severe - **e.g. lower reservoir levels, damage to natural habitats, harm to wildlife and low crop yields**



Feel that 'drought is not treated seriously enough'

*It means **water shortages, plants dying, river habitats decreasing...***
– Business: Scuba-diving shop

*This spring was extremely dry. I've got a river down the road, and **the river was incredibly low.** The reservoir was also the lowest that I can remember.*
– Business: Farmer

For those in farming, drought is more top-of-mind, and the potential consequences more dire

- **Reliable rainfall is essential to farming** – and as such, **water scarcity is a serious concern. While many farms have water saving techniques** from bore holes to irrigation systems, **crops and pasture are often solely, or at least largely, reliant on rainfall**
- As such **drought brings severe consequences, with significant financial repercussions** both in the **short and longer term**

*I think it's a huge issue, and I was **concerned on a number of levels. Will the crops get going for the winter feed? The pasture was so dry it was crunching under your feet [...]** Anything 20 degree+ causes a **huge stress for cows. Ensuring they had water was my first priority.***
– Business: Farmer

Introducing... David

4th generation dairy farmer, with **480 cows**, and almost **1000 acres of land. Reliant on rainfall** for **grass growth and growth of maize and wheat** for winter animal feed/ sale – **but with a bore hole for livestock drinking water**

Due to reliance on rainwater for crops and pasture – **very attuned to drought**, and first began to notice **low water levels in April**; a strong concern for the farm

Over the summer, has been significantly **impacted by drought, with fields drying out, the bore hole running dry, and concern around crops not surviving for winter feed**

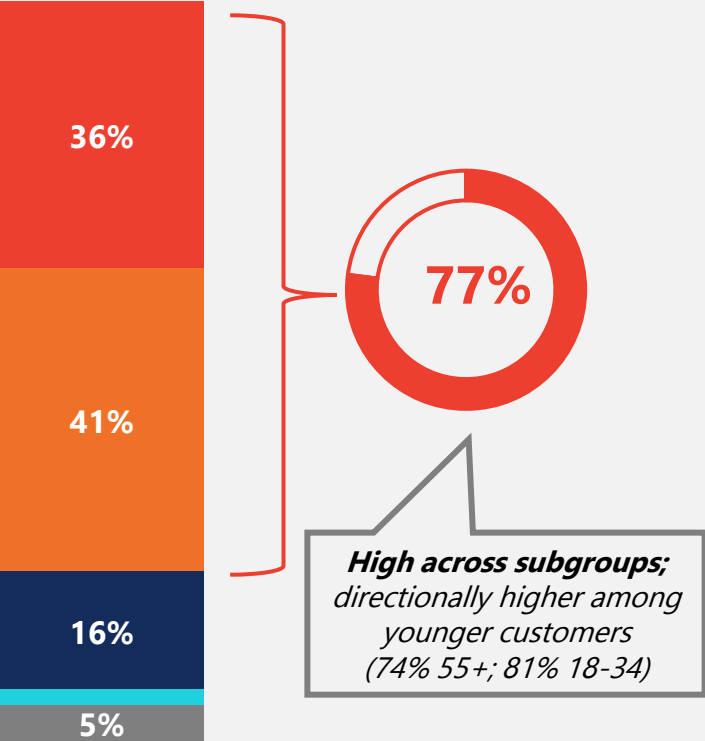
Although maize and wheat did survive, David had to rely on mains supply for the animals once the borehole dried - at significant personal cost of an estimated £17-18k

Most recognise that the frequency and severity of drought is only set to worsen in the future as the planet continues to warm

Drought in the future

Welsh Water customers

- Many more periods of drought
- A few more periods of drought
- The same number of periods of drought
- A few less periods of drought
- A lot less periods of drought
- I don't know



Thoughts towards future droughts

The severity of the climate crisis is understood; there is strong recognition of the increasing pressure on the planet, and a sense that more drought / usage bans can be expected in the future

While climate change is the most cited reason; the role of growing populations and urban creep is also somewhat understood

It does concern me on a bigger scale – on a global climate level. I do see water as a precious resource, and I'm quite aware of the effort it takes to store it
- Household

On a wider level, there is recognition that we are all responsible for creating a more sustainable future, and that water is a precious resource



Wastefulness by the consumer, lack of investment by water companies, substantial leaks – lack of awareness of water as a precious resource. A lot comes down to people -we're consuming everything at such a rapid rate.
- Household

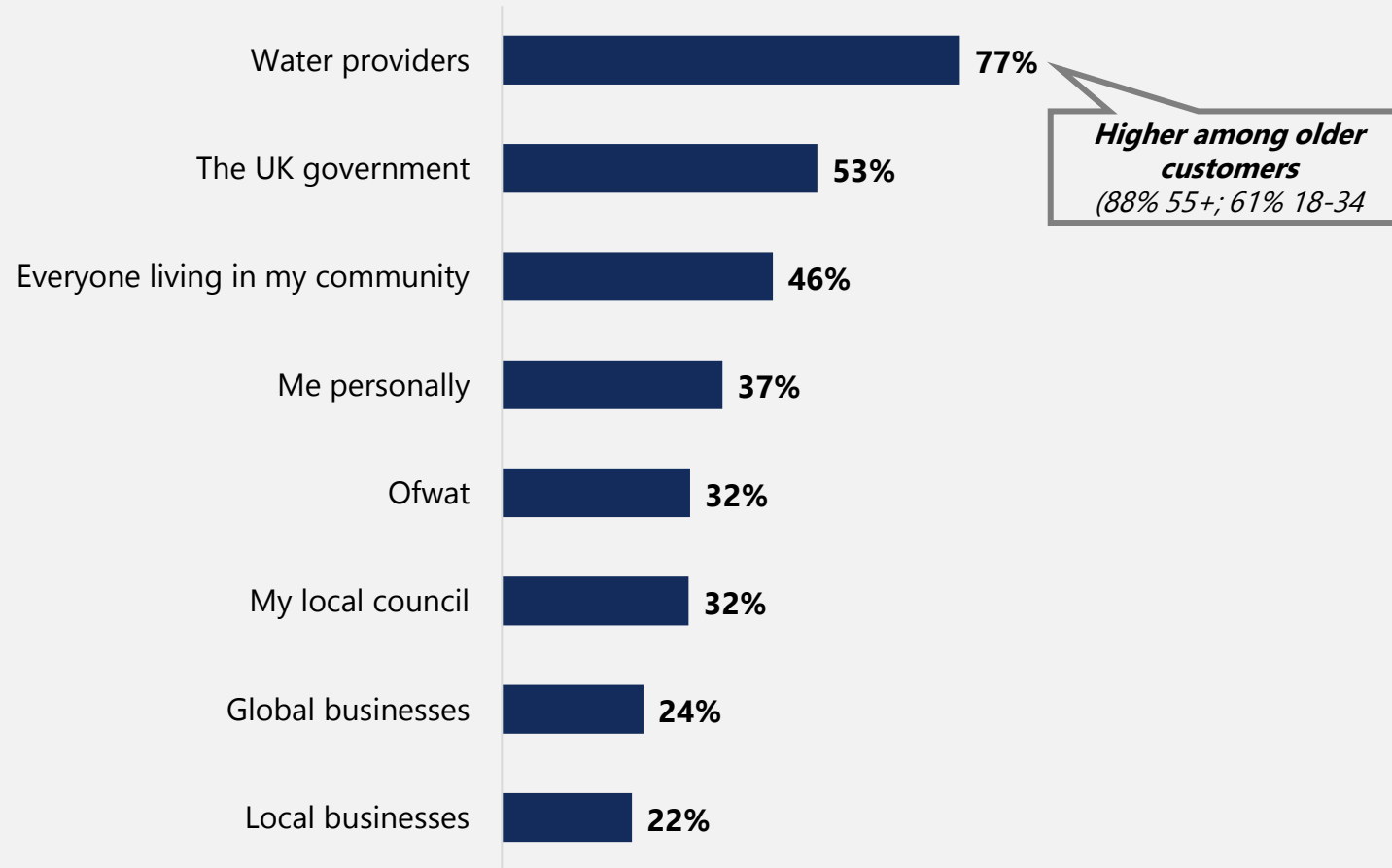
While most agree that **water is a precious resource**, there is a strong sense that on a day-to-day level, it is **often taken for granted**, part of a wider trend towards overconsumption...

- In Pembrokeshire, **this perception is heightened**, by the impacts of **tourism, and vast seasonal weather changes**
- At the height of the tourist season, **household water pressure drops significantly**, and **tankers are drafted in** - bringing **greater awareness to the pressures on the water system, and the issue of water scarcity**

Water providers are seen to have the greatest responsibility for managing water supply and ensuring it is widely available

Responsibility for availability of water

Welsh Water customers



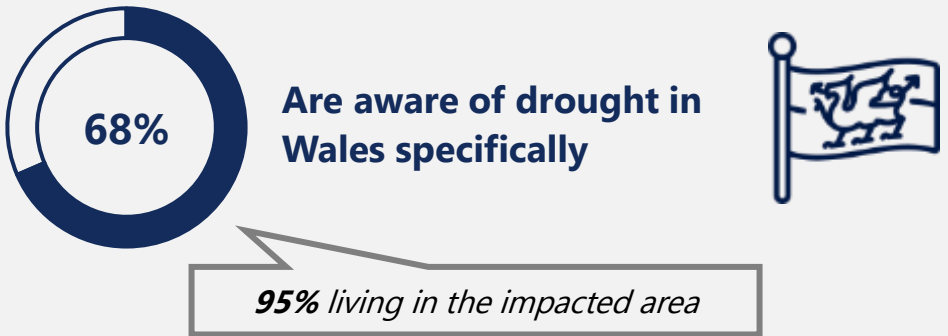
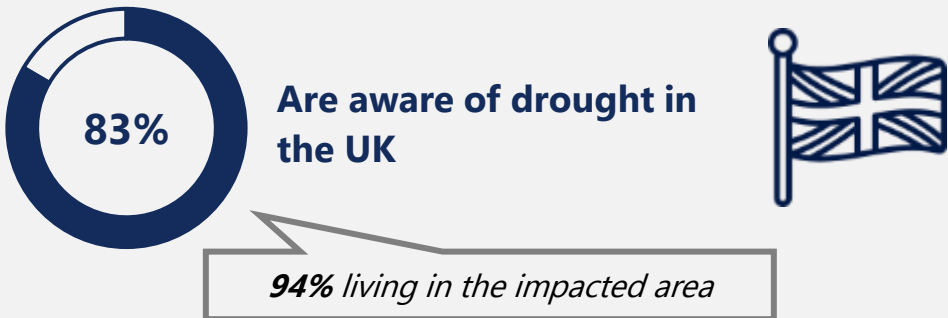


Awareness of Drought and TUBs

Awareness of the current drought in the UK is high as a result of national news; in Wales, it's lower and driven by local news

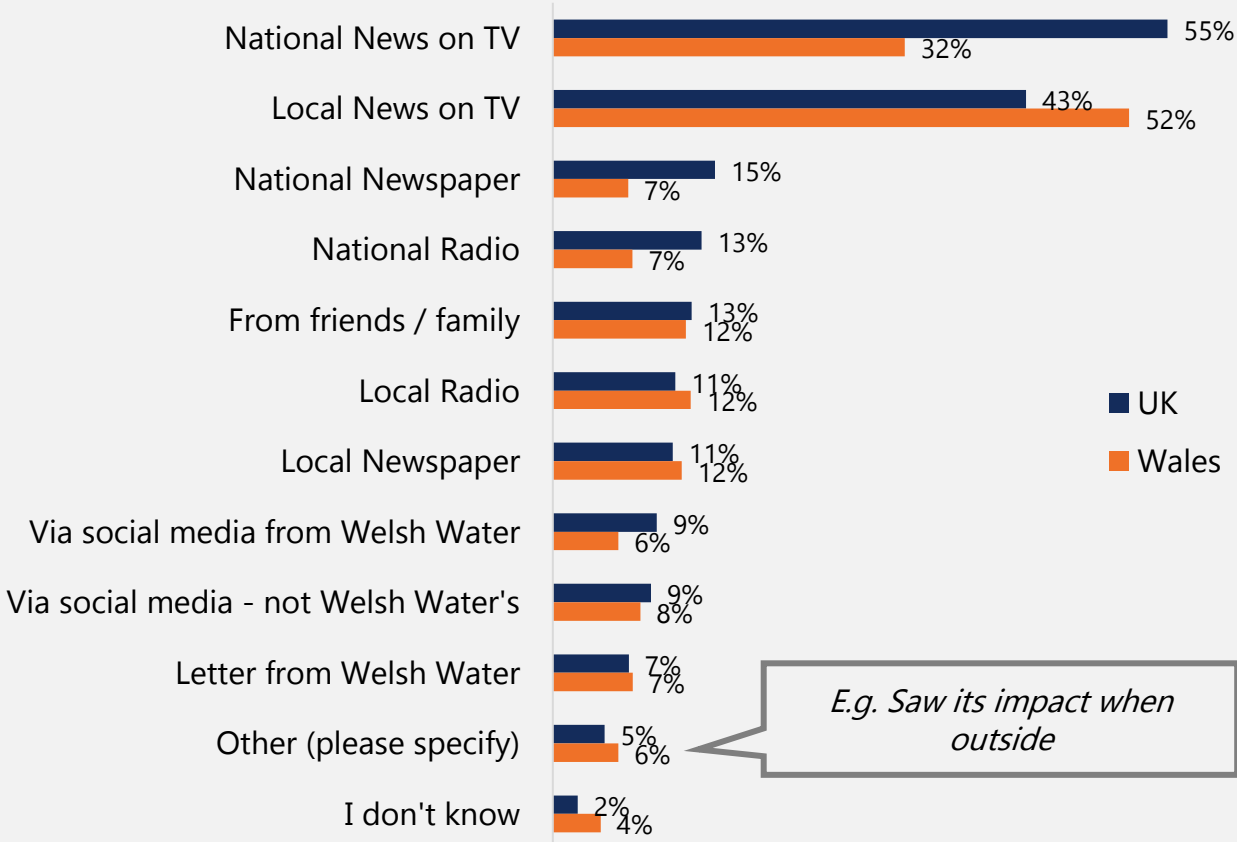
Awareness of drought

Welsh Water customers



Sources of awareness

Welsh Water customers



B3. Wales, and much of the UK, is currently experiencing a period of drought. Is this something you were aware of prior to taking part in this survey? B4a: And how did you become aware that we are currently experiencing drought in the UK? B4b: And how did you become aware that we are currently experiencing drought in Wales specifically? Base: Welsh Water customers (503), Customers in the TUB area (100)

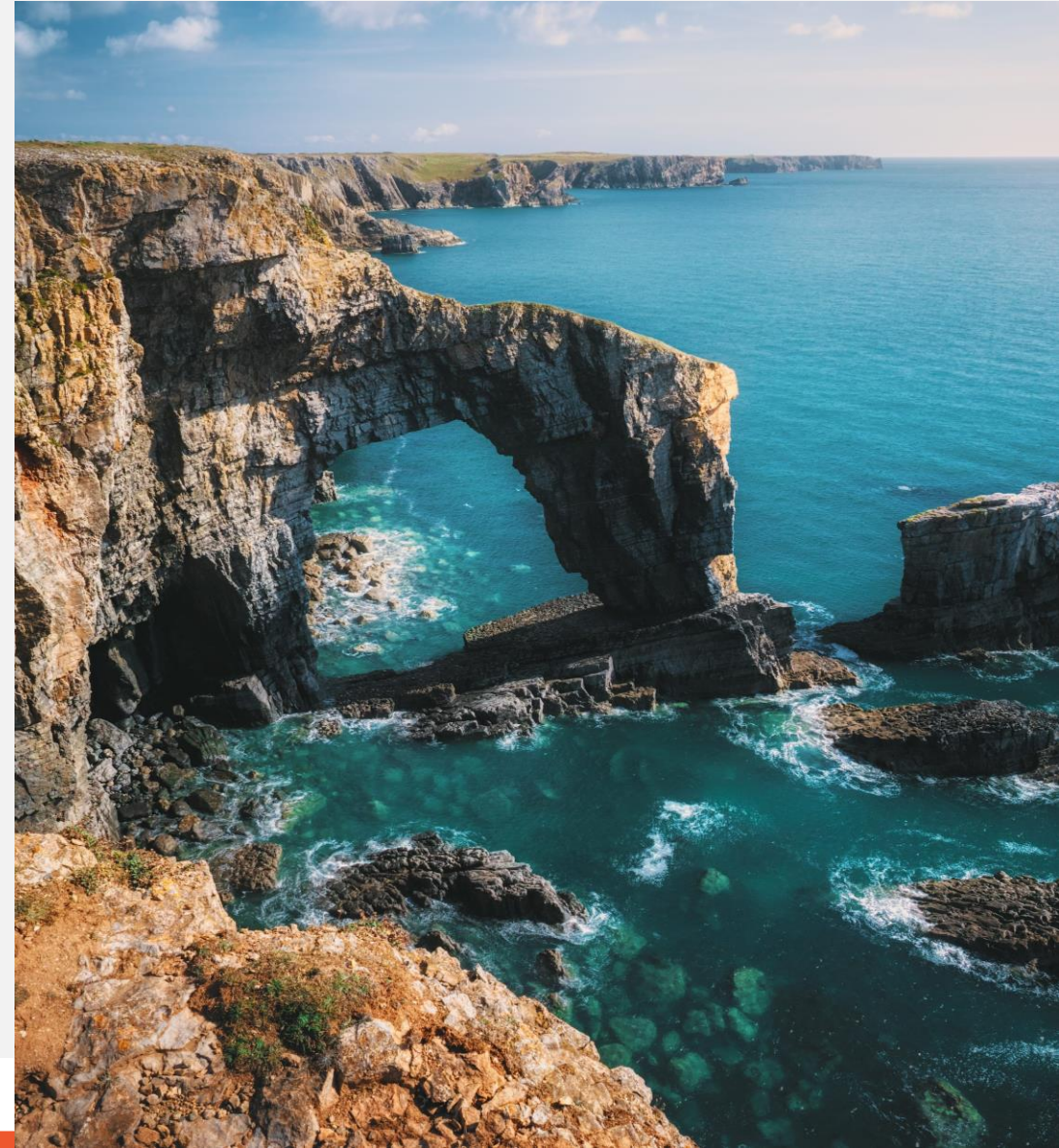
Awareness of a TUB in place across the UK is high; fewer are aware of the TUB in Pembrokeshire and Carmarthenshire specifically

69% are aware of a TUB currently in place in the UK

54% of those are aware of a TUB currently in place in Wales; this is **35%** overall

47% of those are aware of a TUB currently in place in Pembrokeshire and Carmarthenshire; this is **15%** overall

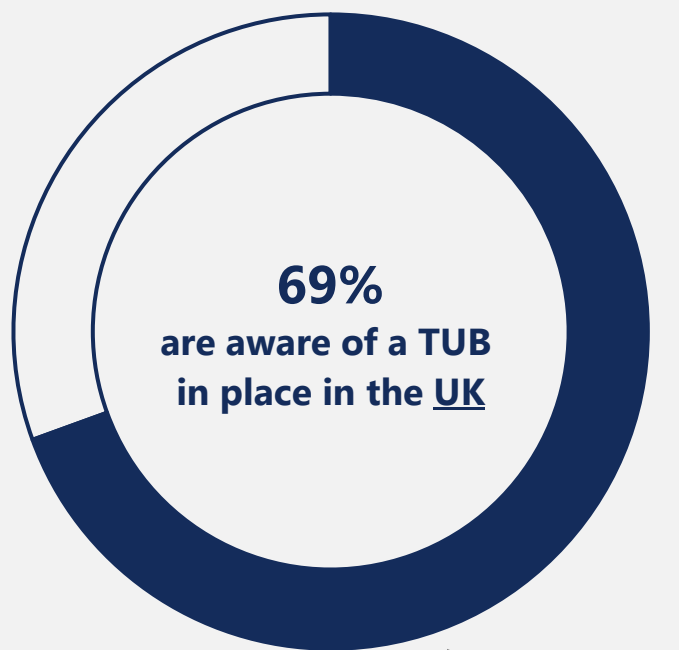
98% living in the impacted area



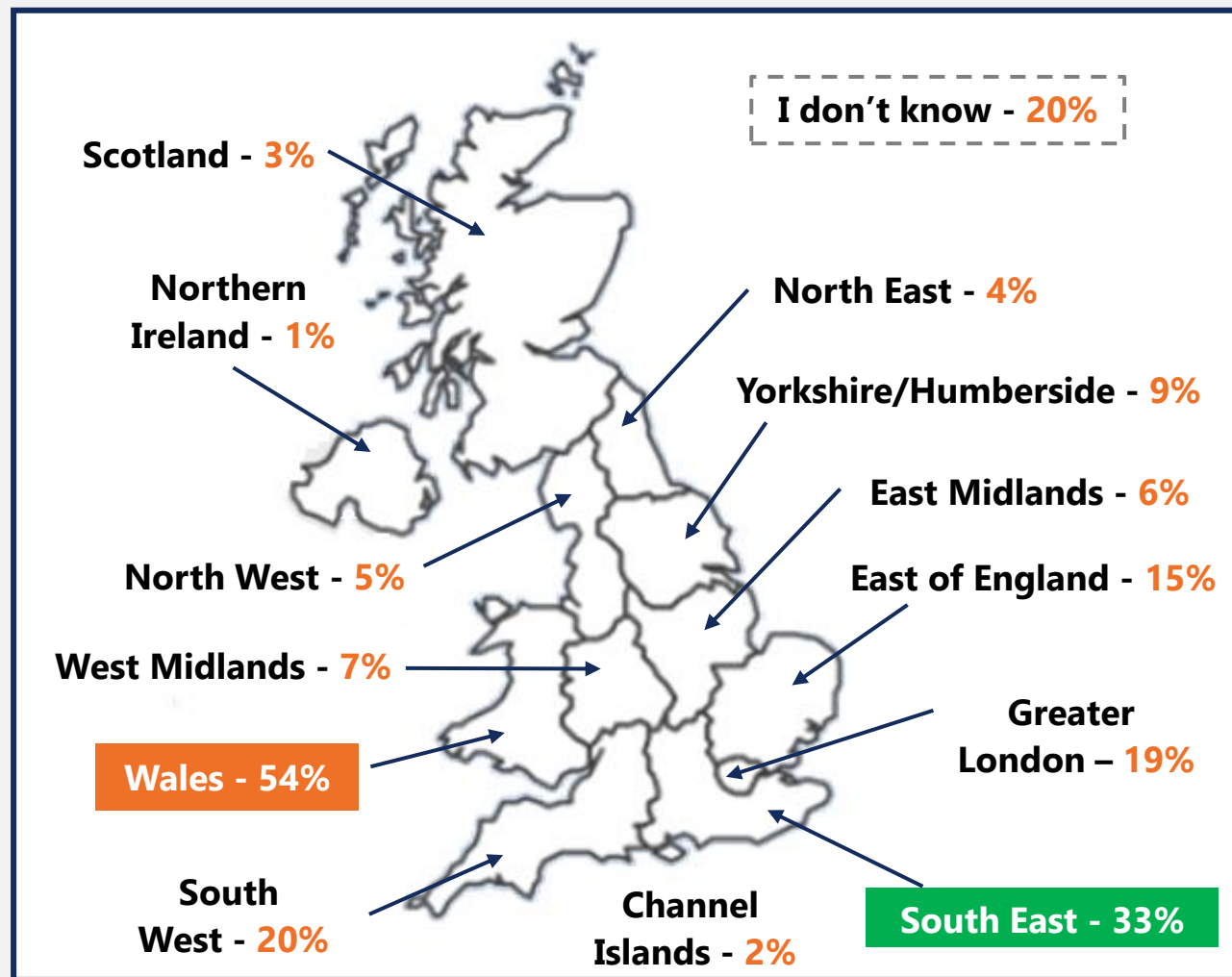
Two thirds know of TUBs occurring in the UK, with over half of these citing the ban currently in place in Wales

Awareness of TUBs in the UK

Welsh Water customers



89% living in the impacted area



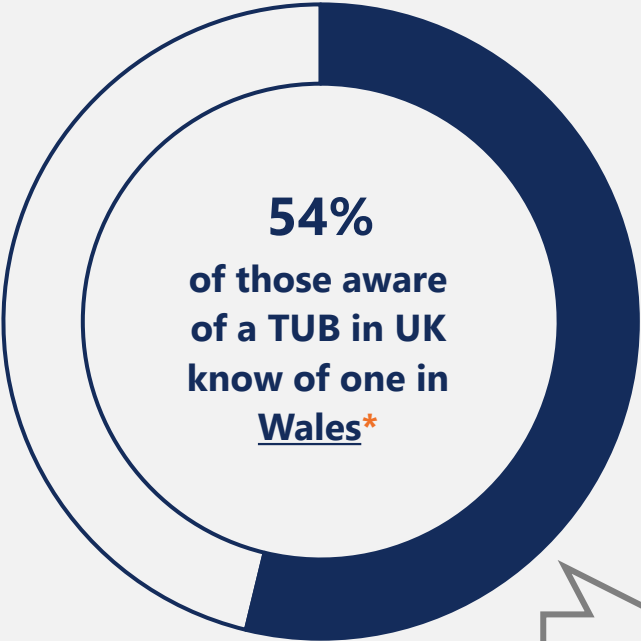
C1: Are you aware of any Temporary Use Bans, more commonly known as a 'hosepipe bans', in place in the UK at the moment? Base: Welsh Water customers (503)

C2: And whereabouts in the UK are you aware that there are currently Temporary Use Bans ('hosepipe bans')? Base: Welsh Water Welsh Water customers aware of TUBs in the UK (324), Customers in impacted area (100)

Of those aware of the TUB in Wales, a considerable minority name the affected areas

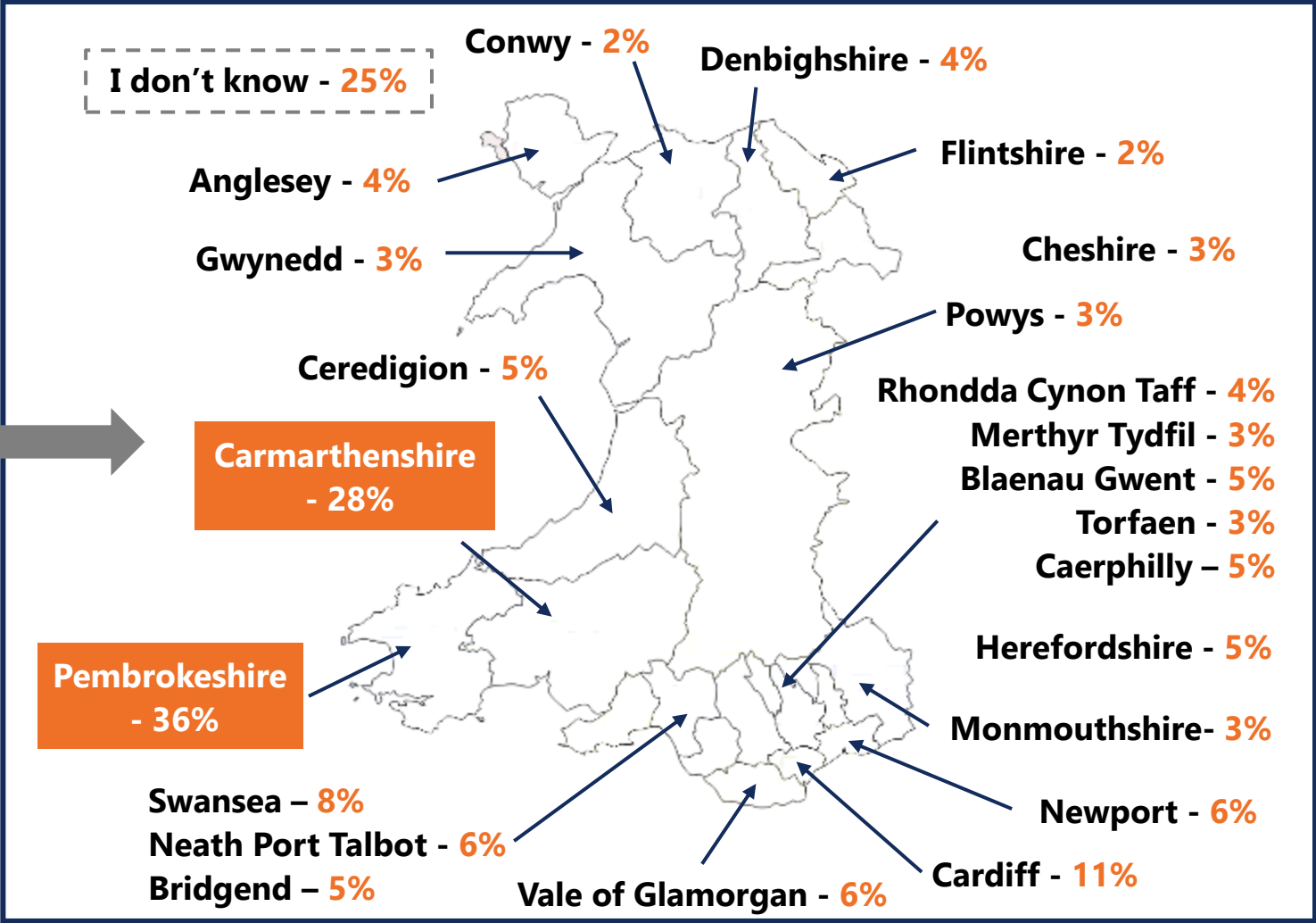
Awareness of TUBs in Wales

Welsh Water customers aware of TUB in the UK



**This is 35% overall*

94% living in the impacted area

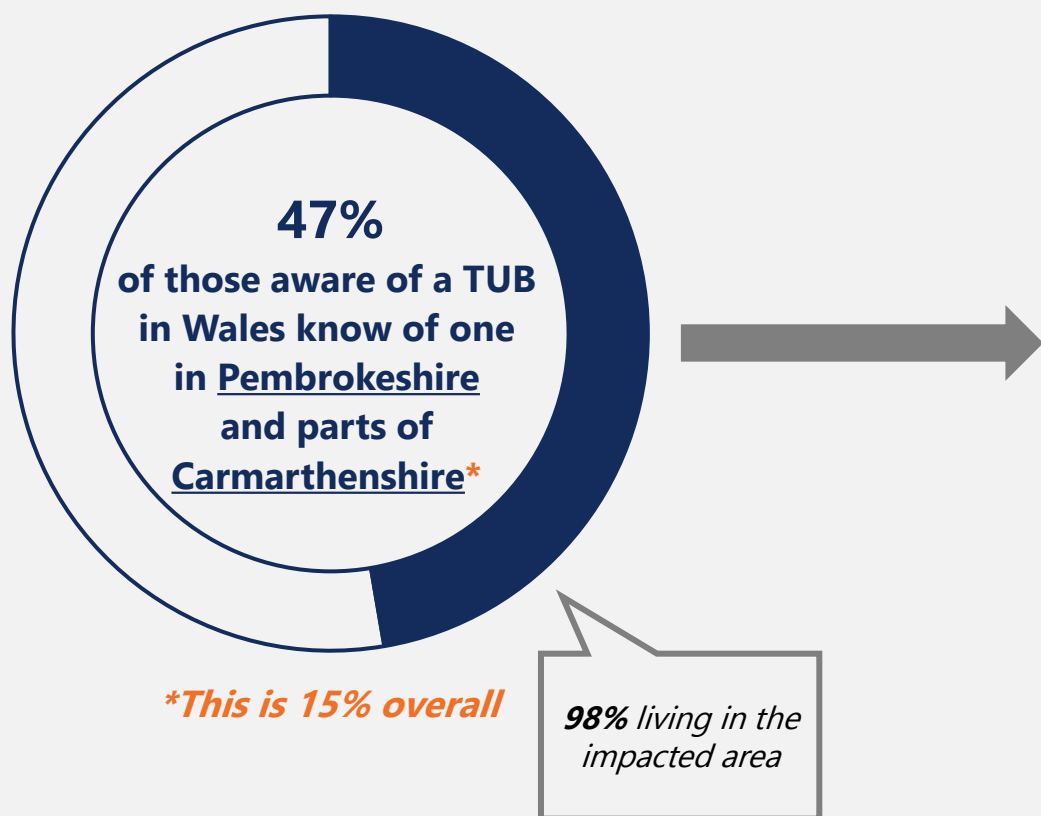


C2: And whereabouts in the UK are you aware that there are currently Temporary Use Bans ('hosepipe bans')? Base: Welsh Water customers aware of TUBs in the UK (324) C3: Do you know specifically which areas supplied by Welsh Water have Temporary Use Bans ('hosepipe bans') in place currently? Base: Welsh Water customers aware of TUBs in Wales (174), Customers aware of Tub living in impacted area (89)

Awareness of the current TUB is largely through local and national TV news; direct communications from Welsh Water are key for those affected

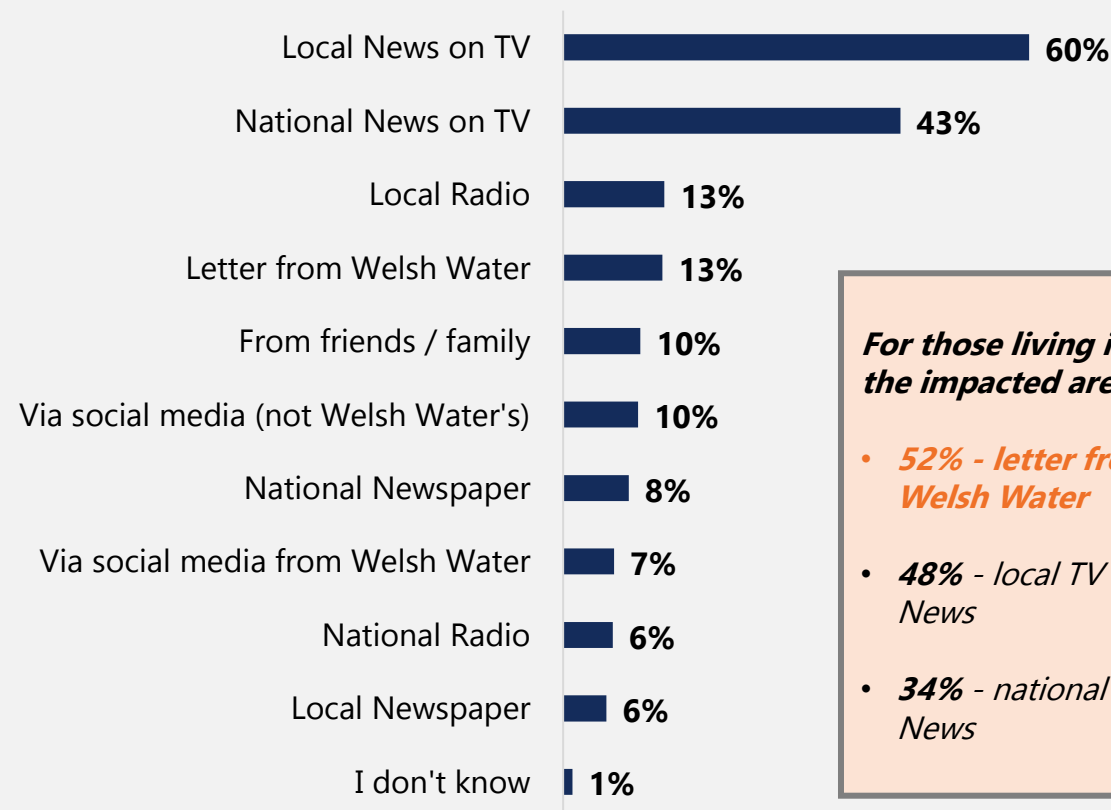
Awareness of Pembrokeshire TUB

Welsh Water customers aware of TUB in Wales



Sources of awareness

Welsh Water customers



For those living in the impacted area:

- **52%** - letter from Welsh Water
- **48%** - local TV News
- **34%** - national TV News

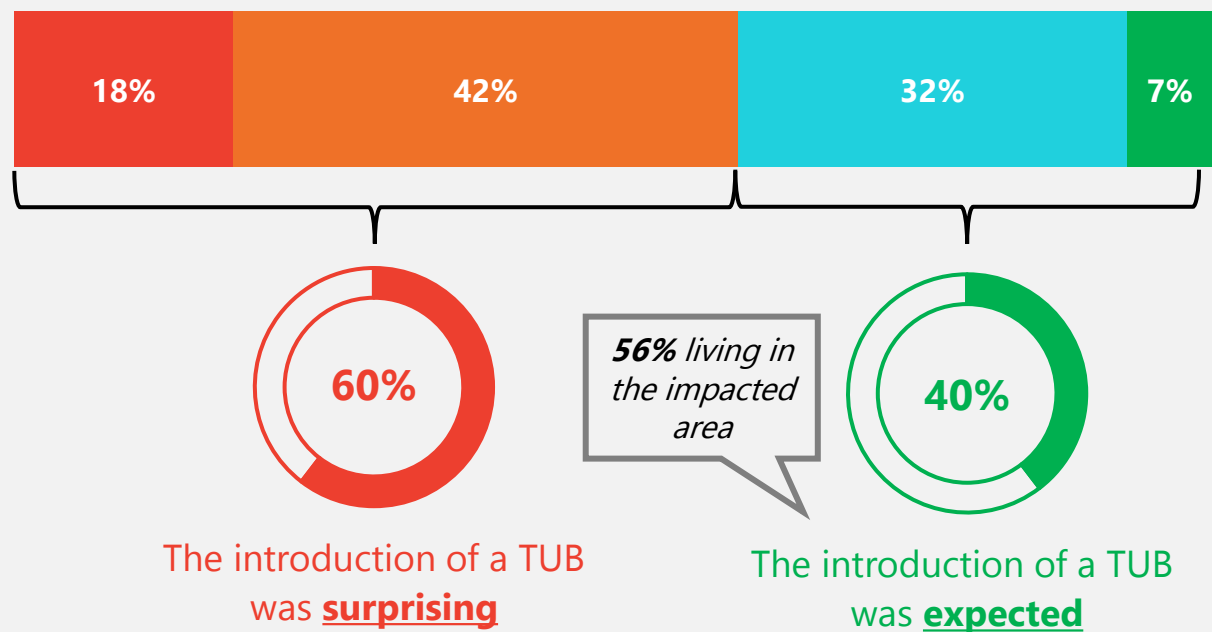


Impact of TUBs

Three-fifths feel the TUB was in some way surprising – though this is not the case for all, especially NHHs whose business depends on water

Surprise at TUB

Welsh Water customers



■ Complete surprise ■ A little surprising ■ Slightly expecting ■ Very much expecting

*I was **surprised** to be honest. I didn't think this summer had been that dry. It **all seemed to happen very quickly** – all of a sudden, there was a hosepipe ban.*
-Household

*Why didn't it happen sooner? We were **all aware it was going to happen** – Llys-y-fran Reservoir was getting low. I thought it should have happened in June or July.*
- Business: Farmer

For those surprised by the ban, low awareness of comms contributed to a sense of the TUB coming 'out of the blue'

- Generally not aware of prior comms relating to water shortages – often only hearing of the ban (and the need for it) as it was about to be introduced
- May have been vaguely aware of drought, but less aware of the extent of the issue– e.g. if not affected on a day to day level
- Some suggestion this was surprising for the area – with hosepipe bans more associated with areas of England, than Wales

The introduction of a TUB was surprising

60%



The introduction of a TUB was expected

40%

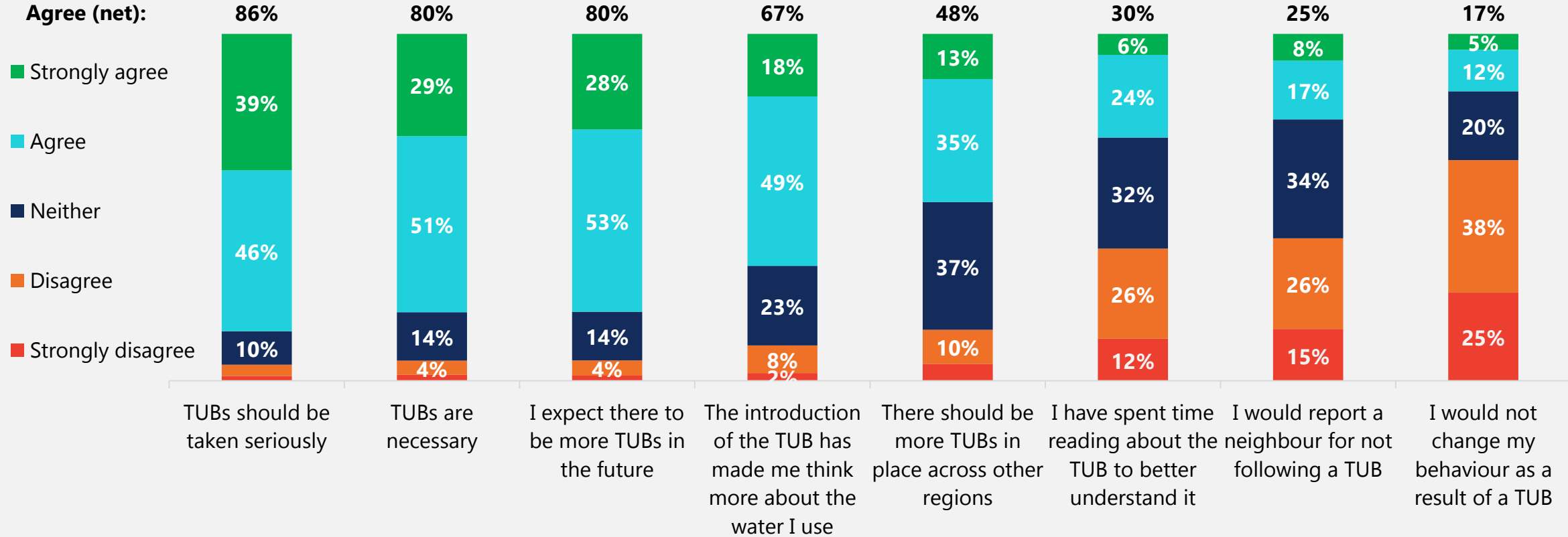
- Often **already aware of the drought – and had been for a while**
- Typically noticed **changes to nearby river levels, drier land or simply, a lack of rain**, or had heard about drought through **news/ online channels**
- **More attuned to drought due to e.g. reliance on water for business needs – esp. farmers** and expecting it to have come sooner, if anything
- May have **remembered previous bans or previous drought** years (e.g. 1976).

Surprising or not, there is acceptance of the need for usage bans; they are recognised as necessary measures, which should be taken seriously

Attitudes towards Temporary Usage Bans

Welsh Water customers

*Higher among younger customers
(76% of 18-34 vs. 62% of 55+)*

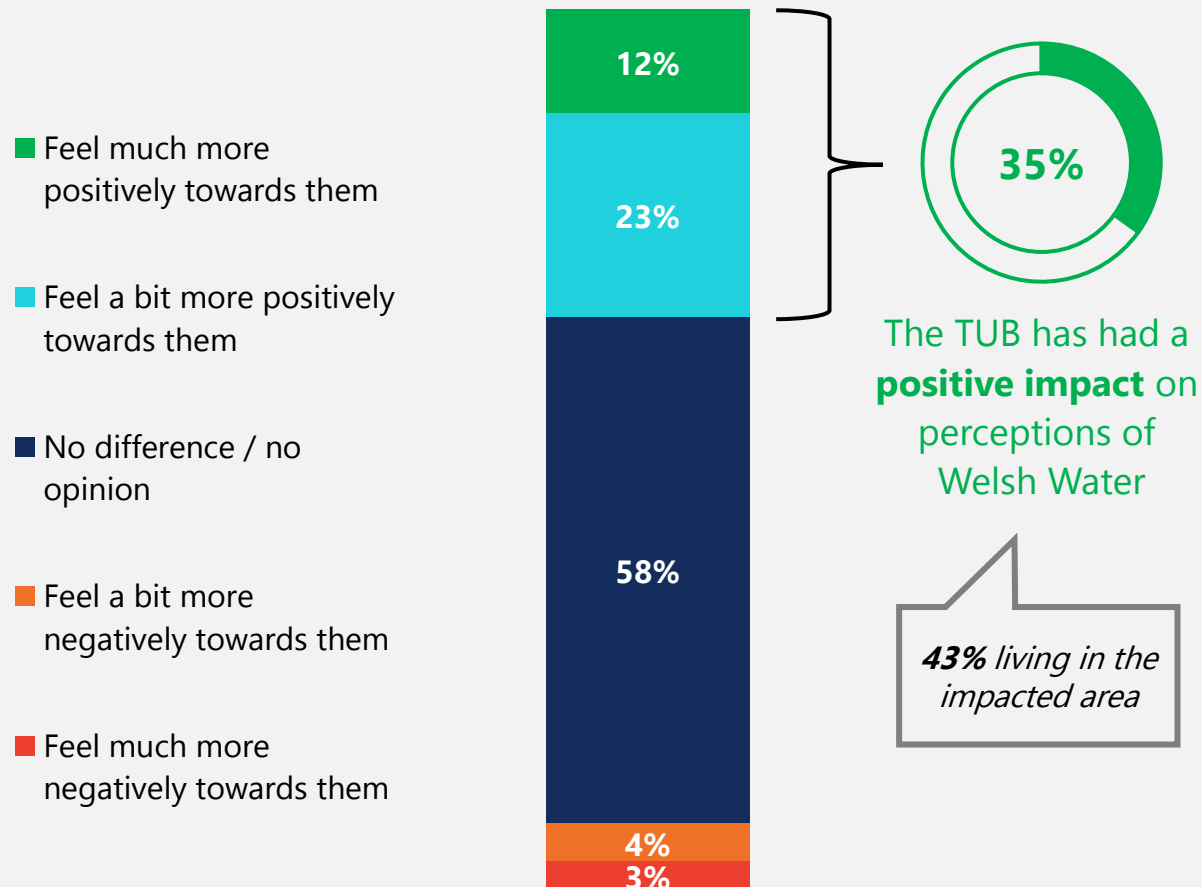


D9. Here are a list of statements that someone might say about Temporary Usage Bans. To what extent do you agree or disagree with each of the following statements?
Base: Welsh Water customers (503)

For most, the ban has not had an impact on impressions of Welsh Water as it is seen as necessary – but it does improve perceptions for just over a third

Impact on perceptions of Welsh Water

Welsh Water customers



- ✓ Done 'for the right reasons' – seen as **necessary and something that should be taken seriously**
- ✓ A sense that **limiting hosepipe usage is a small ask** – even for those who regularly use a hosepipe
- ✓ **Plus, rationalised as worth doing to protect supply for the things that matter more** e.g. drinking water, washing etc.
- ! But for many – just seen as '**doing what needs to be done**', thus not impacting perceptions either way

Those who feel either more or less positively towards DCWW since the TUB are typically polarised on whether the ban was proactive, or reactive

'I feel more positively towards Welsh Water due to the TUB'

- ✓ Viewed positively, as a **sign of decisive action**– taking **responsibility** and **control of the situation** to prevent conditions worsening further

VS.

'I feel more negatively towards Welsh Water due to the TUB'

- ! A minority view, but seen as '**too little, too late**' - especially among **those in farming who had already been affected by drought/ water scarcity for some time**
- ! Driven by limited awareness of earlier comms – a strong sense that **more should have done to prevent this happening** or at **least prewarn those in at-risk areas** – E.g. sense that customers could have **collaboratively reduced usage earlier**, if given prior notification
- ! Among some in Pembrokeshire, a perception that Welsh Water should be doing more to **deal with leaks and pressure on the local supply** if asking individuals to cut down their own usage



*I was a bit annoyed to be honest, **I could see it coming a mile off – why couldn't they?** If they'd had brought in restrictions before all this, I wouldn't have been as miffed.
- Business: Farmer*

Generally, the day-to-day impact of the hosepipe ban has been small, meaning only minimal behaviour changes for most households



The TUB has had **very little or no impact** on daily life

(Only 1% feel it has had a 'big impact', further 40% 'some impact')

*I usually wash the windows with a hose, **but I haven't**. It's a good excuse not to! I also **didn't wash the cars**. I took them to a local car wash once instead. - Household*

*I did think about having baths, but **then stopped myself and opted for showers instead**. I just felt a bit guilty I suppose. - Household*

- **Minimal impact on day to day life** – for some, has meant **no change if not previously using a hosepipe**
- For others has largely **meant:**
 - **using a watering can for plants**
 - **washing vehicles less, or using a bucket or car wash instead**
- Has **piqued consciousness** and led to several small examples of **wider water saving measures**, most commonly:
 - choosing **showers not baths**
 - **flushing the toilet less**, while resources are low
- Generally seen as **easy behavioural swaps, willingly made**; for most Household customers, **hosepipe usage was fairly low to begin with**
- **Odd instance of following the TUB due to 'societal pressure'** – e.g. considering using a hose, but backing off for fear of others' disapproval!
- Some **initial isolated concerns around affect on gardens** – e.g. wilted flowers and drier veggie patches but usually dispelled once in practice



For the NHH customer, wider awareness of water scarcity and drought have driven greater behavioural changes than the TUB itself



SMALL BUSINESSES

- Often **making an active effort to use less water; but some uncertainty if ban applies to them;** desire for clearer communication here/ advice for businesses
- **Initially, some noticed early water pressure drops** e.g. holiday camp owner had to go and adjust water tank for the shower block
- Often **assumed to be due to extra pressure on resources in tourist season** – before learning of drought
- **Examples of some changed behaviours:**
 - Holiday camp owner turning off garden irrigation system and allowed plants to die – but communicating this to guests, who have been largely understanding
 - Local garage owner has stopped car washes during the TUB but will return to normal afterwards as sees the impact he can have as one business being minimal



FARMING

- As with businesses, **not necessarily restricting usage for business needs** – as ban not assumed to apply here:
- But highly aware of the issue, and **already saving water where possible** – and choosing what to prioritise
 - E.g. **prioritising water for filling drinking troughs, not using hosepipe to clean-off tractors**
- Heavily affected by drought – but less so by the TUB
- Often **glad to see efforts being made to protect supply in the area** – but **strong desire for this to have been enacted earlier** (e.g. April / May)

There is a basic understanding of what a TUB means – but much of this is due to it being known as a ‘hosepipe ban’; there is scope to clarify



- There is a general understanding that **hosepipes are not to be used to water plants, fill paddling pools, wash cars and wash patios**
- But there is some **uncertainty regarding whether the ban extends beyond these activities** – some question **what else is / isn't allowed**. E.g. Given a TUB is commonly referred to as a ‘hosepipe ban’ – is this a **ban on hosepipe usage altogether, or are there exceptions?**
- For businesses, there is **some added confusion around what the ban means for them specifically** - although it is often assumed to be targeted only towards household use

*I think I got a letter at home, but **nothing at the Garage that I can remember, certainly nothing that was tailored to my business**. I just assumed it would affect everything - Business: Garage MOT/Service centre owner*

*I did use a hosepipe to wash my dog after a walk in the woods. **I'm not sure if that's allowed or not** – but there's been a virus dogs have been picking up, so I thought it was reasonable
- Household*


Small scale changes to water behaviours are already being made by most; a minority will continue with new habits once the TUB is lifted

Impact on behaviours

Welsh Water customers

	Before the ban was put in place	Whilst the ban has been in place	Will continue once the ban has been lifted	I've never done this
Turning the tap off when brushing teeth	59%	11%	27%	9%
Used the 'eco' mode more on washing machine/dishwasher	53%	12%	29%	13%
Taking shorter showers/baths	47%	20%	26%	13%
Used a watering can rather than a hose on the garden/plants*	46%	15%	23%	21%
Washing vehicles less often*	39%	18%	33%	17%
Flushing the toilet less often	39%	17%	22%	28%
Used water restriction devices e.g. shower head	38%	12%	21%	35%
Washed my patio / doors / windows less	36%	16%	27%	26%
Filling paddling/swimming pools less often*	33%	18%	31%	24%
Used recycled water e.g. washing up water on plants	30%	14%	26%	35%
Watered my garden less / left the garden to die*	24%	22%	21%	36%

D8: Which of the following behaviours have you engaged with before and during the Temporary Usage Ban, and which will you continue once the ban has been lifted?
Base: Welsh Water customers (503) *Options rebased among those who own these things.



Although the impact of the TUB has been limited, most admit they are likely to return to their usual habits after the ban has lifted

On the most part – this is **driven by ease and convenience.**

E.g. it is **quicker and easier to use a hose** for gardening or cleaning cars, plus **watering cans/ buckets can be heavy to carry around!**

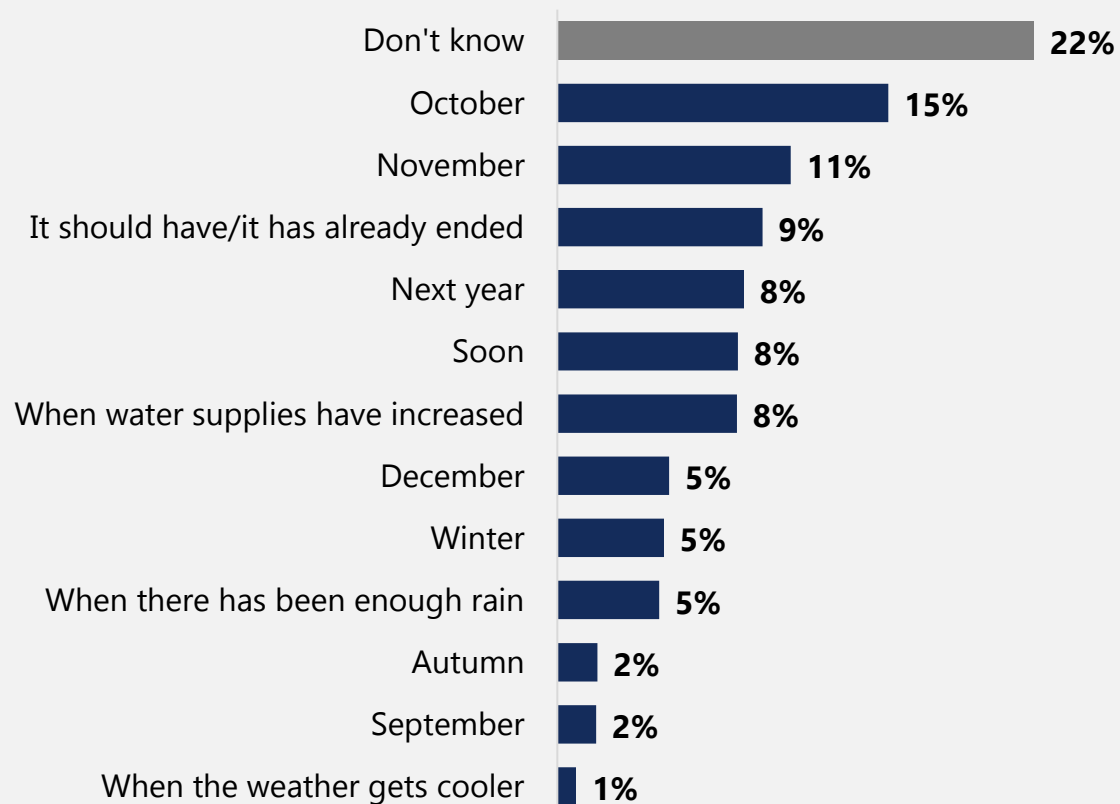
Smaller water saving changes feel easier to maintain and adopt as new habits in the longer term– e.g. turning off the tap when brushing, or showering over baths...

But there is a risk most will slip back, once the ban has lifted, and drought faded from the news as seemingly 'resolved'.

While there is some understanding that the ban will be in place until the water supply replenishes, lack of timescales has led to uncertainty

Expected length of TUB

Welsh Water customers



- Some recognition that replenishing the water supply can take a while and that the **recent rain does not immediately mean the ban is lifted**
- Those who are aware the ban is in place – typically **believe the ban will be lifted** by the end of **October or November**
- However, **others have no idea if they are still under a TUB or not**, they assume so but feel this has dropped off the DCWW and media radar – lack of **expected timescales in comms has led to confusion**
- Regardless, a **sense that the length of the ban matters less** as we move into the winter months and occasions for hosepipe usage naturally wane (e.g. paddling pools, lawns etc)

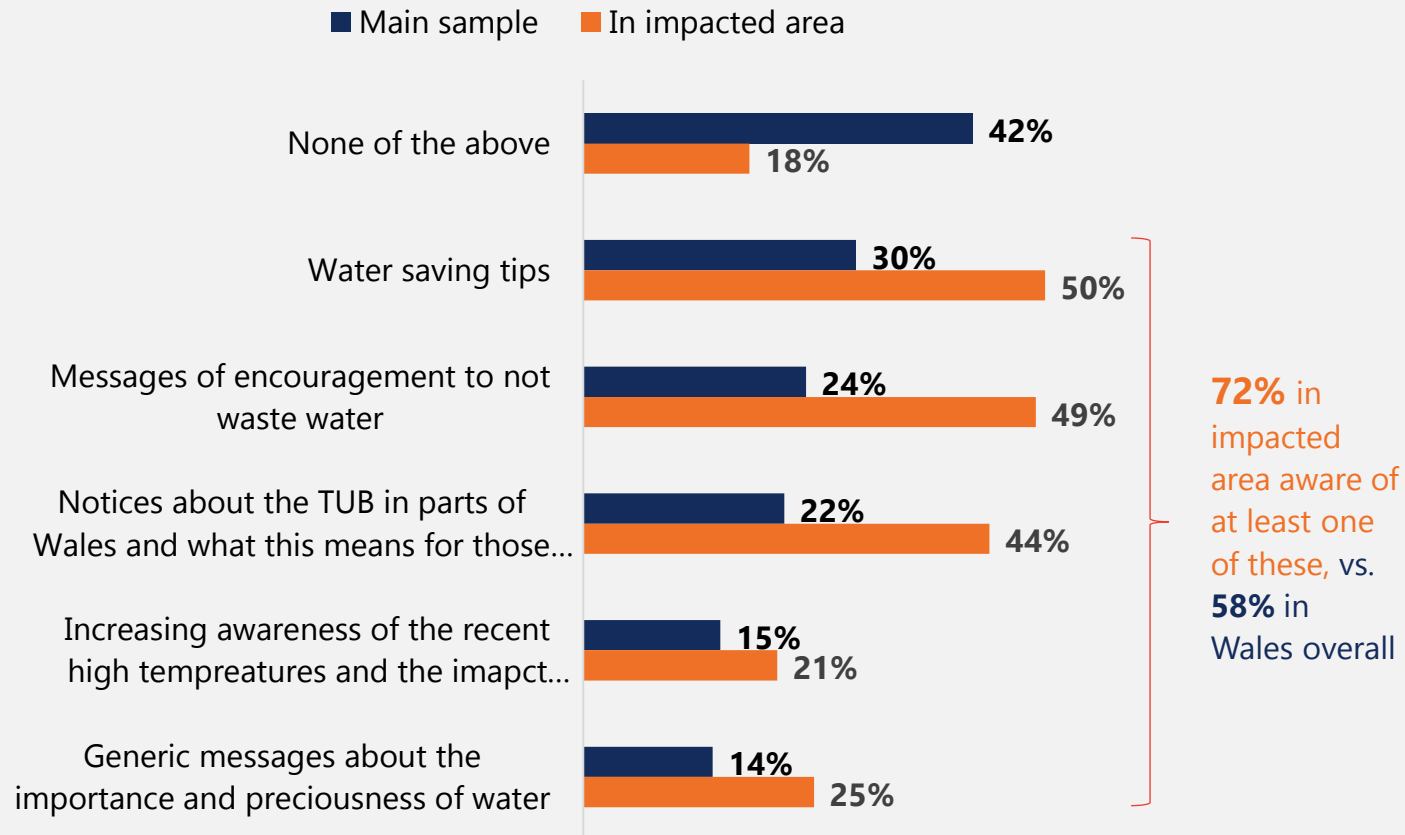


Message testing and comms

Awareness of drought and TUB comms has been limited except for those in the affected area

Awareness of comms

Welsh Water customers



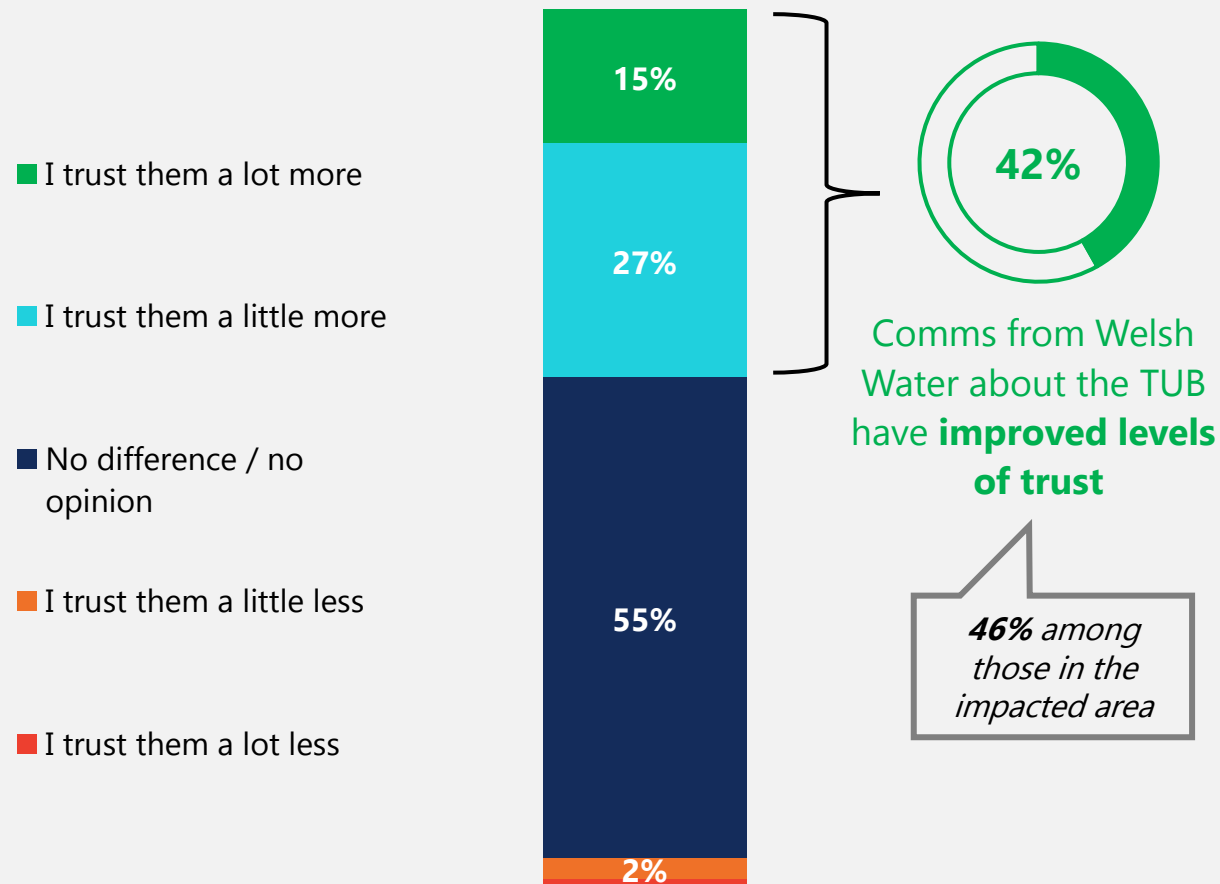
Wider awareness of comms is relatively low– with many hearing from **local or national news before Welsh Water**

Even in the area, a strong expectation to have heard more, earlier; most household customers are not actively following DCWW on social media, and often only became aware of the extent of the issue once the ban was about to come into force

Among those who have seen comms, the content has been somewhat effective in building trust

Impact of comms on perceptions

Welsh Water customers



Some awareness of TUB was driven by the **letter sent to households in the affected area**;

- ✓ Generally, the letter was **seen to be positive**
- ✓ **Spontaneously called out as clear and easy to understand**
- ✓ **A good means of explaining exactly what was and wasn't prohibited under the ban**
- ! But, often the **first many had heard from Welsh Water on the issue**

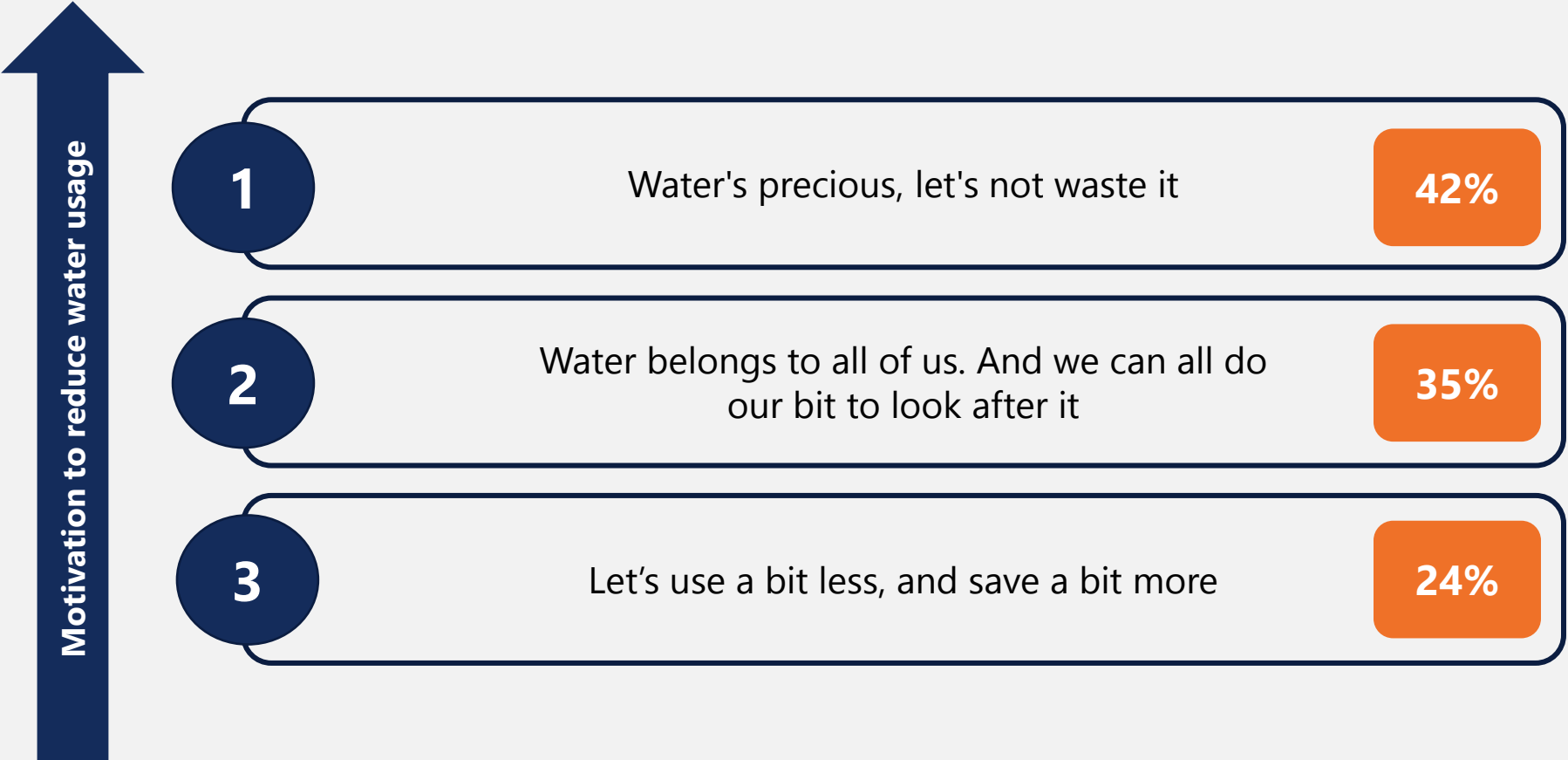
While the letter landed well, a perception that **communication could and should have come earlier**; e.g. so customers could have **known to reduce usage, before crisis point was reached**

- Suggestion that **text would have been a more effective**, yet still non-disruptive channel, to communicate each level of escalation **prior to the letter needing to be sent**

Messaging emphasising the 'preciousness' of water is seen to be most motivating over calls to action

Message testing

Welsh Water customers

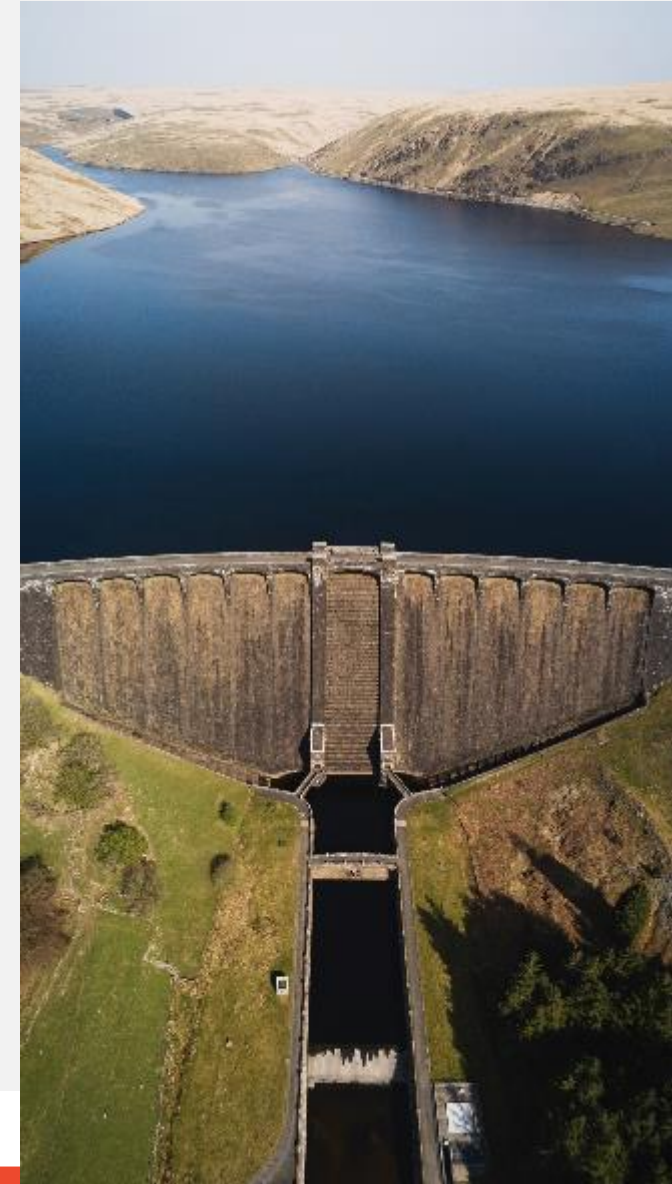
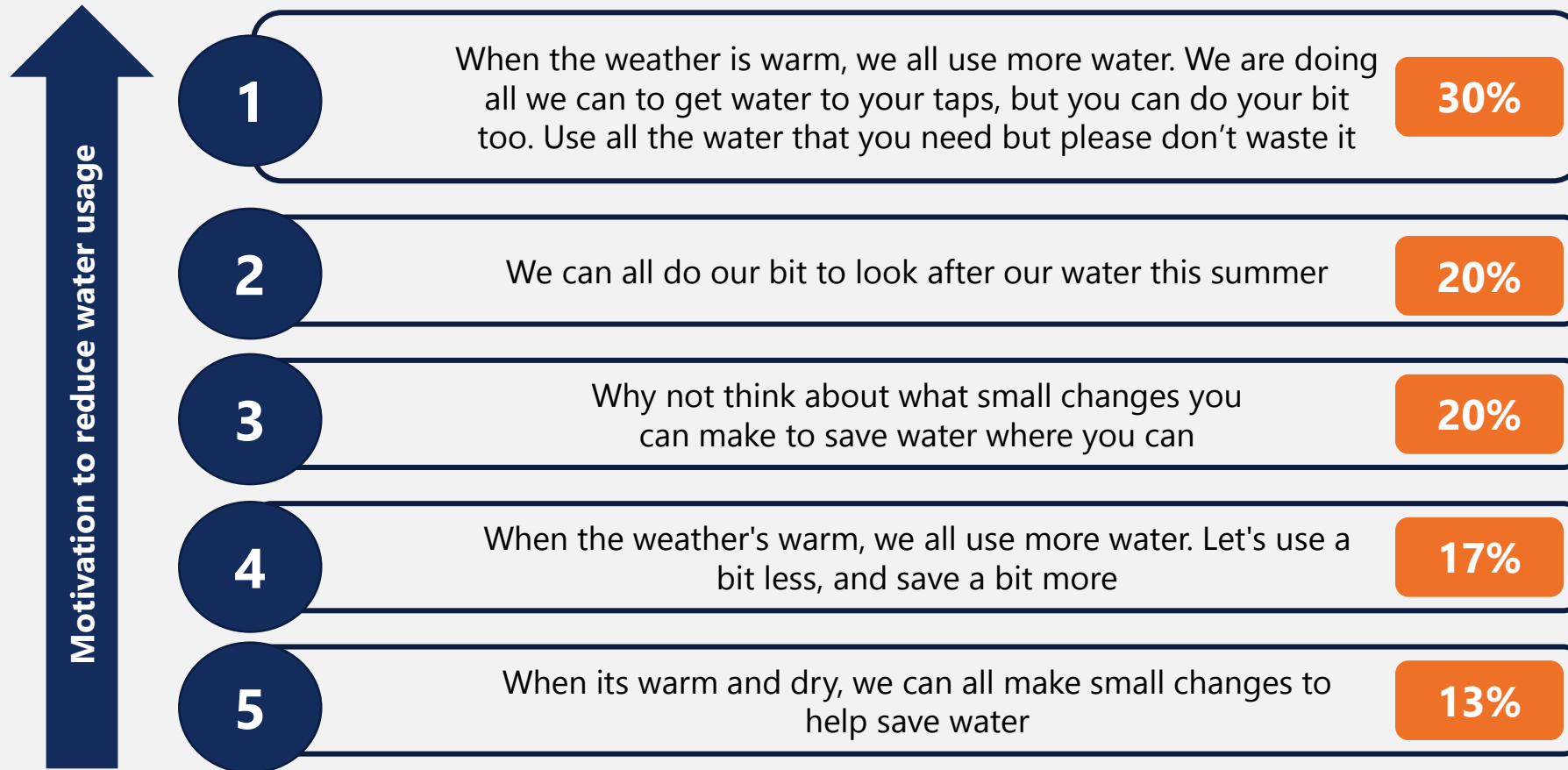


C7. Welsh Water often share messages encouraging their customers to reduce their water usage. Which of the following messages would best motivate you to reduce your water usage?
Base: Welsh Water customers (503)

Emphasising that 'we are in this together' is seen to be more motivating than encouraging individual behavior change

Message testing

Welsh Water customers



Sharing tips on water saving is less motivating for customers than emphasizing that there is a collective need for change to have an impact

Message testing

Welsh Water customers



1

We're doing everything we possibly can to make sure you have enough water, but we need your help! Here are some small changes you can make to help save water:

- Make sure the dishwasher is full and use the eco setting
- When you make a cuppa, fill your kettle with only as much water as you need
- Re-use washing up water on plants in the garden

51%

These simple actions will help us keep our water flowing.

2

When there is a sudden heatwave, the demand for water increases and this is when there can be a strain on our resources.

We're working hard around the clock to make sure we get every drop to you, and we'd like to ask you for a little help too.

30%

By making small changes to save water where we can, together we can make a big difference.

3

Temperatures are set to increase again today, and after the prolonged warm weather we have experienced we are asking everyone to think about the steps you can take to reduce the amount of water that's wasted.

19%

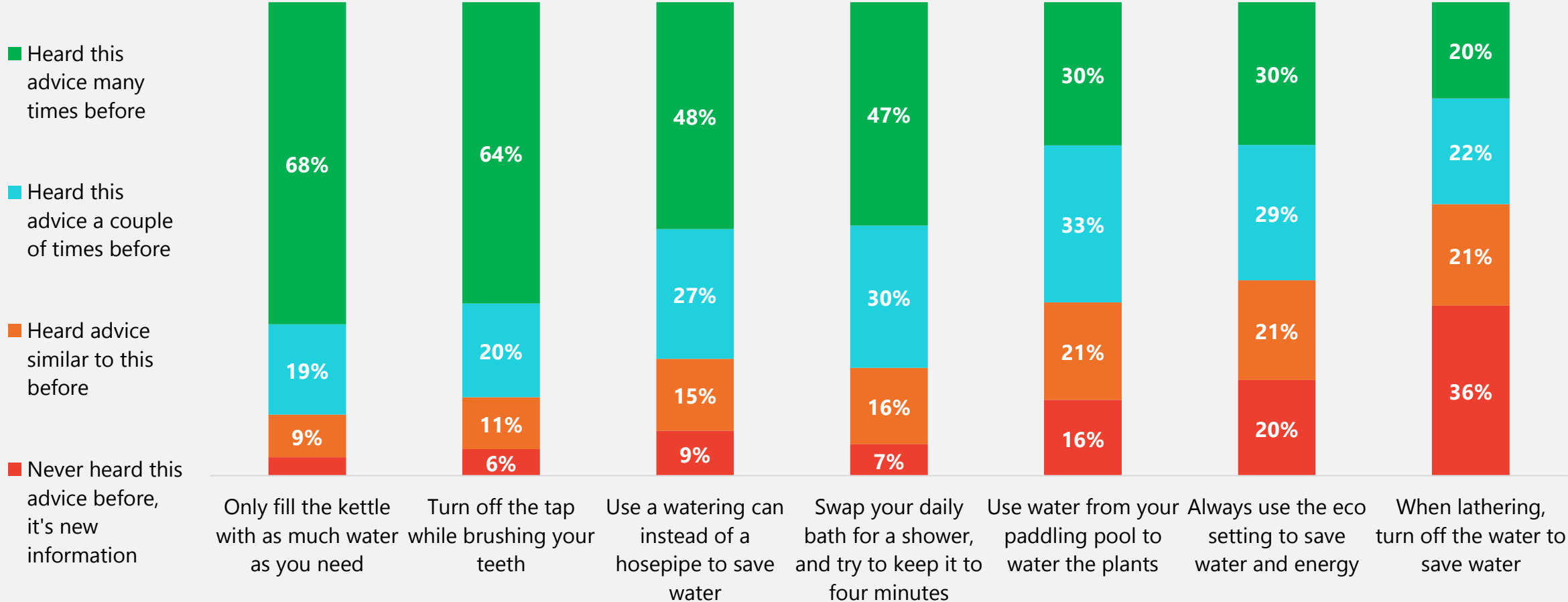
Keep hydrated but please don't waste it.



Much of the water saving advice shared by Welsh Water has been heard by customers before, revealing an opportunity to change DCWW comms

Water saving advice

Welsh Water customers



C8: Which of the following water saving tips have you heard before?
Base: Welsh Water (503)

Although often missed, social media posts relating to TUB feel clear and comprehensive - but should focus on shared responsibility



- ✓ Effectively seen to inform and educate – clear in **explaining the issue, and why action is needed**
- ✓ Inclusion of 60% **stat feels relevant and lands the severity of the issue**
- ✓ Tone feels about right – informal, but not too laid-back, **cues a need for action but not panic**
- ✓ **Overall – using the term Temporary Usage Ban is a positive; makes this feel like a wider issue than just hosepipe usage** (more likely to drive wider water saving behaviours, and relevant even to those that don't currently use a hosepipe)

We have experienced a long period of warm dry weather recently.

To ensure we maintain supplies for all customers and the local environment through the summer and into the autumn, we are implementing a Temporary Use Ban in Pembrokeshire from the 19th August.

This means that customers will not be able to use a hosepipe to do any of the following:

- Water the plants
- Fill hot tubs or paddling pools
- Clean your cars, paths, patios, windows

If you feel that your circumstances mean that you should be exempt from the ban, you'll need to get in touch with us before the 17th August.

For more information on the ban and the exemptions please visit our website dwrcymru.com/drought

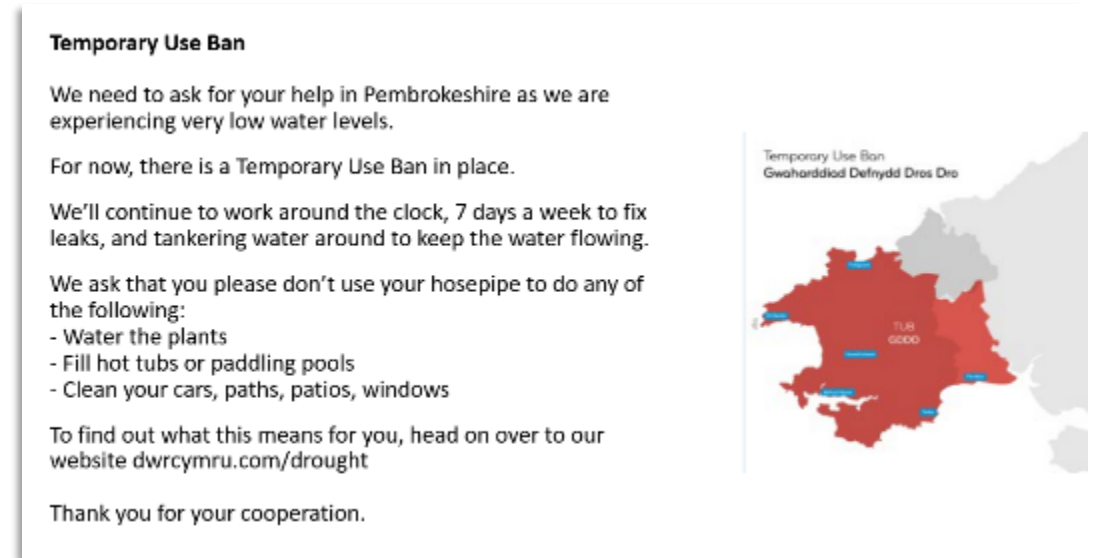


- ✓ Less urgent but feels **like a natural build – clearly communicates what is and isn't permitted**
- ✓ **Feels friendly and a bit lighter in tone**
- ! But can be seen to be a **bit wordy; missing 'proof point' stats**
- ! Can also feel like the responsibility is being passed solely onto customers; **does not reference what DCWW are doing to help**
- ! For both, **image can polarise**. For those aware of the expected levels; lands the message of drought. But for others; feels contrary to the message – **fields look green and healthy; weather looks misty (and even a bit rainy!)**

Explaining exactly what is and isn't permitted is useful information - clearly lands the impact to customers



- ✓ **Feels collaborative**, strikes a **nice balance by showing both DCWW actions and the customer actions**. Language and tone feel **friendly, collaborative**
- ✓ Usage of **'We and You'** feels like we are all in it **together – a team effort**.
- ✓ **Image generally seen to do the job**
 - ! Although some suggestion showing the consequences of drought (e.g. a hosepipe on parched grass) might be more impactful
- ✓ **Clearly outlines what is and isn't prohibited**



- ✓ As with the previous, **clearly outlines what is and is not allowed**
- ✓ Explaining what DCWW are doing to help e.g. working 7 days a week **feels like a strength**
 - ! Although **can be met with some scepticism** among those with previous experience of leaks going unfixed
- ✓ **Inclusion of 'thanks' goes a long way** – feels appreciative of the steps taken by customers
 - ! **Map can polarise** – for some; **raises awareness that only they are affected** (and leads to questions as to why)



Summary and recommendations

Summary of key findings



UNDERSTANDING OF DROUGHT

Drought is generally **known to be a result of limited rainfall** – and most are aware of the role **climate change** plays here.

While the **effects of drought on household customers are fairly minimal**, for those working in industries such as farming, **the impacts have been much more severe**, and the demand for decisive action from Welsh Water **much higher**

AWARENESS AND ATTITUDES TO THE TUB

Awareness that the ban was going to happen is relatively low; in the affected area, the ban was a surprise to 44%– with some only becoming aware of the extent of the issue as the ban was about to be introduced. However- **the ban has not negatively impacted perceptions of Welsh Water**; and there is recognition of the necessity of TUBs

IMPACT ON BEHAVIOURS

For those in the impacted region, **effects of the ban have been relatively small** largely meaning simple changes at home. Wider awareness of the pressure on the water supply has also **prompted wider water saving behaviours**. However – **it is questionable how much of this will remain** after the ban has lifted, and when drought has fallen fully back out of the public consciousness

Looking ahead...

1. **Educate customers year-round** - be visible, and address education gaps by growing awareness of water scarcity, and the fact that Wales is not inherently resistant to drought – even when water levels are not immediately low
2. **Inform of water scarcity early, across direct channels** – maximise reach and cement a sense of keeping customers ‘in the loop’. Consider use of a proactive ‘low water level warning’ letter or text message to introduce the issue early, both encouraging uptake of water saving behaviours earlier, and prevent a sense of TUBs feeling unexpected. There is permission to do this without causing panic – and bolstering perceived proactivity
3. **Continue to explain the impact on the customer in direct terms, but reinforce a sense of being in it together**, by heroing both DCWW and customer actions in comms – and offer expected timescales to avoid uncertainty





j.mason@wearerelish.com

k.firth@wearerelish.com

megan@wearerelish.com

3 Angel Walk
Hammersmith
London
W6 9HX

T: 0208 994 2333



wearerelish.com



twitter.com/wearerelish



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