WRMP
Customer feedback

August
2024

Background

Objectives

Yorkshire Water's Water Resource Management Plan outlines how they intend to maintain a safe and reliable water supply in the long-term. Due to climate change, population growth and regulatory restrictions on abstraction, there is increasing strain on water supplies. Therefore, the WRMP is crucial to outline how YW is going to secure water supply for all customers long into the future.

The response to Ofwat's Draft Determination will need to include customer insight regarding the WRMP. Although YW tested the draft version last year, they have not tested the finalised version of the plan. This research aims to evaluate how supportive customers are towards the plan overall, as well as specific elements such as the PCC targets.

We wish to find out:

- How supportive are customers of the final WRMP?
- How supportive are they of our levels of service in the event of a drought?
- How do customers feel about our plan to address the supply-demand deficit?
- Do they support our methods of reducing demand for water?
- How supportive are they of our plan to increase our water supplies?
- Are customers aware of environmental destination and how supportive are they of it?
- Do customers believe that this plan will address future water challenges?

Methodology

Survey on the Your Water community with a 3rd party boost

DATE: 6th - 14th August 2024

626 took part:
- **303** members of the community
- **323** 3rd party panel participants

The survey data was weighted to broadly represents the general population of Yorkshire on age, SEG, location and gender.

Community discussion, with **22** Your Water members

DATES: 6th– 13th August 2024

Key Take Outs

- **Support is high for the plan overall**, with most feeling that it is thorough and effectively addresses important issues and future challenges.
- **The aims of the plan are well received** and address existing customer concerns, such as the amount of water lost through leakage. However, while the aims are felt to be important, customers are slightly less likely to believe they will be achieved.
- **Support for demand reduction plans is high.** While there are mixed feelings towards smart metering, many are open to the idea that customers have a joint responsibility to reduce usage, alongside Yorkshire Water.
- **Support for supply increase plans is also high,** though slightly more are neutral or unsure compared to demand plans, reflecting a lower level of understanding of these initiatives and their implications.
- **Over 9 in 10 support the drought resilience target;** support is slightly lower for the timeline (though still high). 2030 is most commonly suggested as an alternative target date by those who are unsupportive.
- **Support for PCC targets is high;** customers accept that improvements will take time, and that it's important to strike a balance between being ambitious and realistic.
- **Very few understand the concept of environmental destination or its implications.** Some however raise concerns about how sustainable abstractions are, suggesting a reduced reliance on this would be welcomed by those aware of the environmental impact.
- **The document itself is seen as clear and easy to understand** by most, though could benefit from a few improvements, such as a plain English definition of technical/industry terms.

Support for key measures

90%+ 80-89%

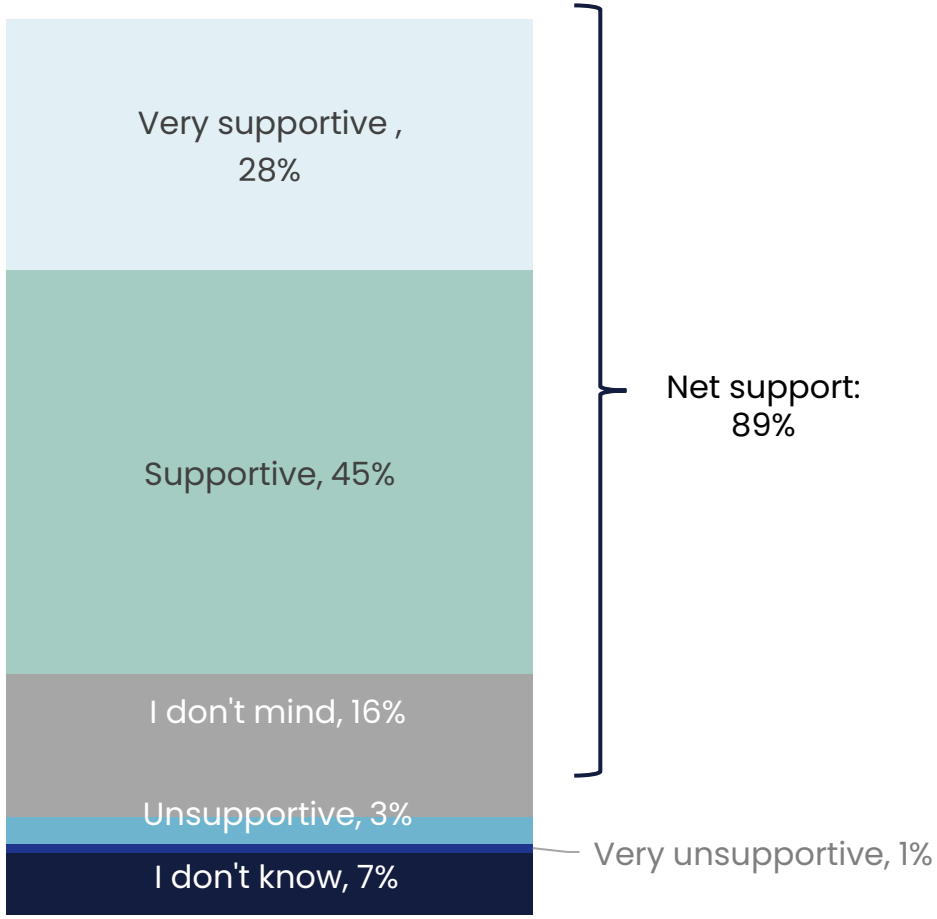
	Net support *
Support for the plan overall	89%
Support for overall aims	93%
Support for drought resilience targets	92%
Support for drought resilience timeline	85%
Support for plans to reduce demand	91%
Support for the plan to increase supply	87%
Support for PCC targets	82%

* Net support includes “very supportive”, “supportive” and “I don’t mind”

The plan overall

After reviewing the whole plan, support is high, with no notable differences between sub-groups

›Support for plan overall



> *The balance between reduction and supply initiatives is fairly balanced. I think these plans will be fairly effective if they are all implemented, but the struggle will be with getting people and businesses to reduce their consumption of water.*
>
> - Female, 65+, North Yorkshire

> *The plan incorporates responsibility from customers and the water company, outlining proportion of water sources and a timeline to go with this.*
>
> - Female, 45-54, West Yorkshire

Q21: Having read about the plan in more detail now, please tell us how supportive you are of the plan overall. Base 626

Those supportive feel that the plan is thorough and effectively addresses important future challenges

› Why supportive?

Support is given as the plan is seen as clear and well thought out; customers like the fact that it accounts for all eventualities and helps to secure safe water for future generations.

- The plan and timeline seem sensible and encompass a variety of pathways to cover a range of scenarios.
- Technology such as smart meters is seen as a good step forward to support customers in making changes.
- It's felt that the plan will have a positive impact on both customers and the environment.
- It is important to take action quickly to safeguard water supplies for the future; the plan appears to do this.
- There is also a degree of trust that Yorkshire Water have the right expertise to develop an effective plan.

"I support everything YW is doing in an effort to save water and encourage the public to do the same. Campaigning and advising of these plans is necessary to give the public confidence in YW as at the moment, with the news on YW fines, this is more negative than positive."

- 65+, Female, North Yorkshire

"I believe that YW has taken everything into account, including customer views."

- 18-24, Female, North Yorkshire

"It sounds like a sensible approach which mixes user and supplier responsibilities and actions for dealing with the problem. It feels like a partnership rather than waste companies just telling us we need to use less water."

-Female, 35-44, South Yorkshire

"The plan has a clear objective and is prepared to utilise existing measures to fulfil the deficit. The confidence I have in Yorkshire Water is high and they are continually adapting to the issues that are placed upon them."

- Male, 45-54, West Yorkshire

Source: Discussion (Base 22) and survey (Q22: Please tell us what makes you say this.? Base 626)

Those unsupportive lack faith in Yorkshire Water to deliver on the plan's aims and actions

› Why unsupportive?

The few who are less supportive towards the plan raise concerns about the following areas:

- Whether the plan is achievable/a lack of faith in Yorkshire Water to take the necessary actions.
- How much of the onus for reducing water usage will be placed on customers rather than YW.
- Timeline for action is too long/this should already have been addressed.
- The cost to the customer of implementing the plan.

"There is one very ambiguous statement that reads "Our plan is affordable recognising there is a willingness to pay to improve the water environment". Has this been deliberately left vague? Or can we assume the ordinary customer will, once again, bear the majority of the burden?"
– Female, 65+, East Riding

"The one component that I think would spark controversy is the financial cost potentially increasing but it would depend on how much."
- Female, 18-24, North Yorkshire

"The greatest challenge at the moment I think is water leaking from the Victorian underground pipes and this is something that is constantly happening."
– Female, 65+, North Yorkshire

"Yorkshire Water is only looking for an excuse to raise prices further and don't have the ability to make any meaningful changes in these areas."
– Male, 65+, West Yorkshire

"It has targets far too distant in the future. No one currently working for Yorkshire Water will still be employed by them in the 2080's, so there'll be no accountability. The public distrust water companies already, don't give them more reasons to by projecting ridiculous future targets near the end of the century."
- Male, 45-54, East Riding

Source: Discussion (Base 22) and survey (Q22: Please tell us what makes you say this.? Base 626)

Some feel details on the cost of the plan is missing, others would like more focus on educating customers about water efficiency

>Anything missing from the plan?

The areas most felt to be missing from the plan are:

- An explanation of the cost of the plan: How the plan impacts customers' bills, what they will be expected to cover, and how much of the plan Yorkshire Water will be paying for
- An educational element in local communities and schools, with information on saving water, and the environmental benefits of reducing usage
- An explanation of why more reservoirs are not being built to increase storage of water

Some also mentioned:

- Plans relating to vulnerable groups and how their needs will be taken into account
- Water saving devices to help reduce usage in the home
- Desalinisation, using the seas around us for extra water sources
- Harvesting of grey water for gardens and toilets

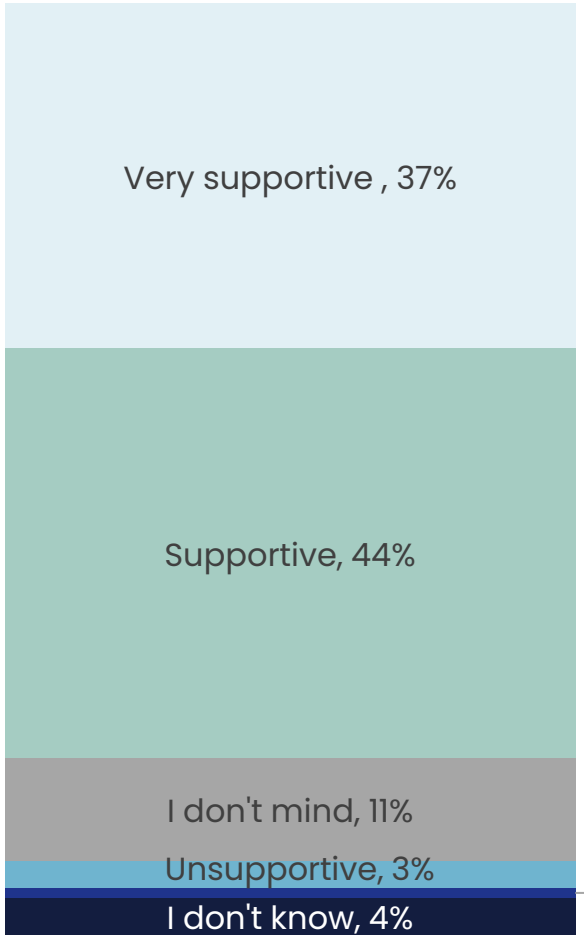
> *Maybe a reminder to YW customers that water can be used repeatedly. Why throw cooking water away when it can be safely reused to water their plants or washdown your patio / yard.*
>
> - Male, 65+ East Riding

> *It may have been interesting to have more details on the current state of reservoirs and their capacity.*
>
> - Female, 45-54, North Yorkshire

Q23: Is there anything missing from the plan that you would expect to see listed? Base 626

The aims of the plan receive high levels of support, especially from younger customers

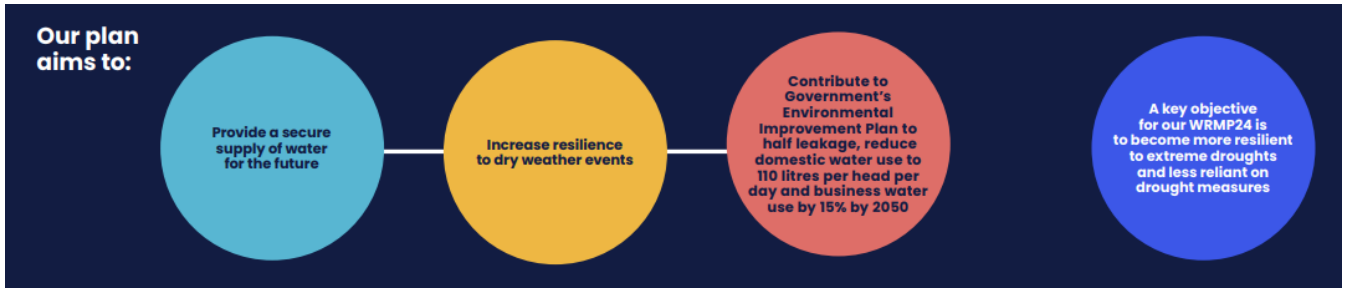
›Support for overall aims



Net support: 93%

Very unsupportive, 1%

- 18-34 more supportive (97%)
- Those from East Riding more supportive (100%)



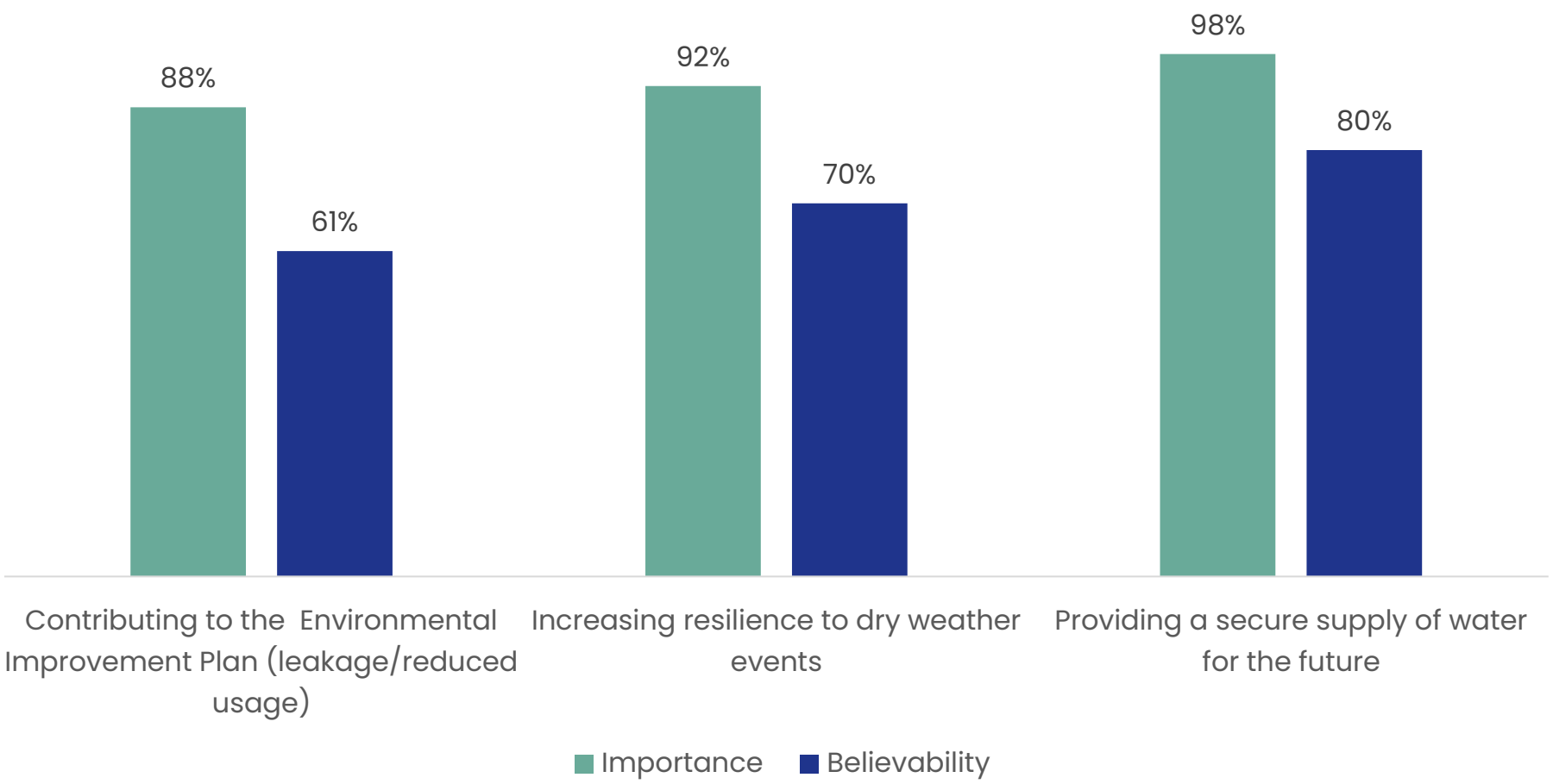
Key insight

We know that customers have concerns about a number of areas that the WRMP focuses on – with the amount of water lost through leaks being seen as a pressing issue by many. This is reflected in the high level of support for the plan aims; customers recognise that having a plan in place to address these challenges is essential.

Q8: Firstly, having read the information, how supportive are you of the plan's overall aims? Base 626

While the aims of the plan are all felt to be important, customers are slightly less likely to believe they will be achieved

>Importance and believability of aims (net)



Importance:

- Providing a secure supply of water for the future-

Extremely important higher for Females (85%) and ABC1 (86%)

- Increasing resilience to dry weather events-

Extremely important lower for 18-34 (46%)

- Contributing to the government's Environmental Improvement Plan-

Net importance lower for those in the North (81%)

Believability:

- Providing a secure supply of water for the future-

Net believable lower for those in the North (71%) and higher for 18-34 (90%)

- Increasing resilience to dry weather events

Net believable higher for 18-34 (79%) somewhat believable higher for Female (53%)

- Contributing to the government's Environmental Improvement Plan-

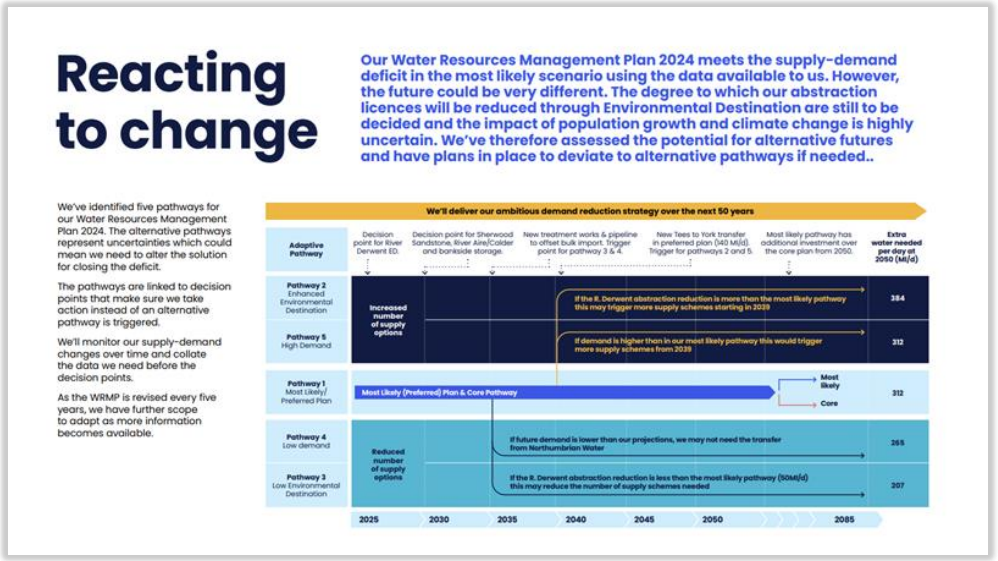
Net believable higher for 18-34 (77%)

Q9: Please tell us how important you feel each of the aims outlined are. Base 626
Q10: Based on what you read, how believable is it that Yorkshire Water's plan will meet each of the following aims. Base 626

Customers feel positively towards the process YW have been through to develop the plan, including adaptive pathways

›Views on the planning process, including the adaptive pathways

- Clear that the planning process and document are extremely thorough, and all eventualities considered
- The planning shows they are trying to address a wide range of issues and challenges and protect the future supply while balancing supply and demand
- The use of adaptive pathways is reassuring and seen as a sensible precaution, taking into account a range of possibilities and possible future threats to the plan
- Nothing is felt to be missing from the pathways to account for additional scenarios, though customers don't necessarily feel they have the knowledge to form a judgement on this



> *"The five pathways cover the possibilities that come to mind, but I am far from an expert, particularly in the matters of the potential effects of climate change."*
>
> – Female, 45-54, South Yorkshire

> *"I feel reassured that the planning process has been thorough. The pathways do take into account everything expected for the future and are differentiated to apply to differing scenarios. Which is good to know, because who knows what the future may bring."*
>
> – Male, 45-54, West Yorkshire

Watch out!

Customers don't understand the concept of environmental destination; a concise, plain-English definition is needed in the plan to engage on this topic. However, some raise concerns about the sustainability of future abstractions, suggesting that a reduced reliance on this would be welcomed by those aware of the environmental impact.

Source: Discussion (Base 22) and survey opens (n=626)

Increase in water usage due to the consumer society [will be a challenge in future]. As well as more population and housing meaning more water being used as per anticipated levels. People are also seeing the need to buy items such as hot tubs for their gardens. Paddling pools for children have also become two/three times the size. Domestic usage will go up for frivolous things such as this.

– Female, 35-44, West Yorkshire

While the plan document is well understood, a few tweaks could enhance this further

›Clarity of the document

While most understand the plan document overall, a few suggestions to aid greater comprehension are provided:

- Provide a **shorter summary of the plan** highlighting the main take-outs in a concise and easy-to-digest format. Alternatively, make the document **less text-heavy** overall (with more bullets/less lengthy narrative)
- Some would like to see **less technical terminology or industry 'jargon'** used. This is felt to reduce the accessibility of the document to those without existing knowledge
- To mitigate this, the plan could provide a **clearer definition/ glossary of terms** in plain English – for example, 'licence transfer', 'PCC', 'PCW', 'environmental destination' etc.
- A few would like **visualisations or references** that make it easier to understand the volumes of water being discussed, such as toilet flushes or full kettles

"I would think if 'methodologies' is not understood they will just pass the word by without thinking what it means. Layman's terminology is best for your normal customer in the street, unless the jargon is to confuse customers?"

– Male, 65+, South Yorkshire

"I would be happy to see some kind of guide or infographic on litres per 3 min shower, per kettle, boiling pan of veg, per laundry load, near washing, as it might help as I expect some use less, others more. Don't know what the government water labelling initiative is."

– Female, 65+, West Yorkshire

Source: Discussion (Base 22)

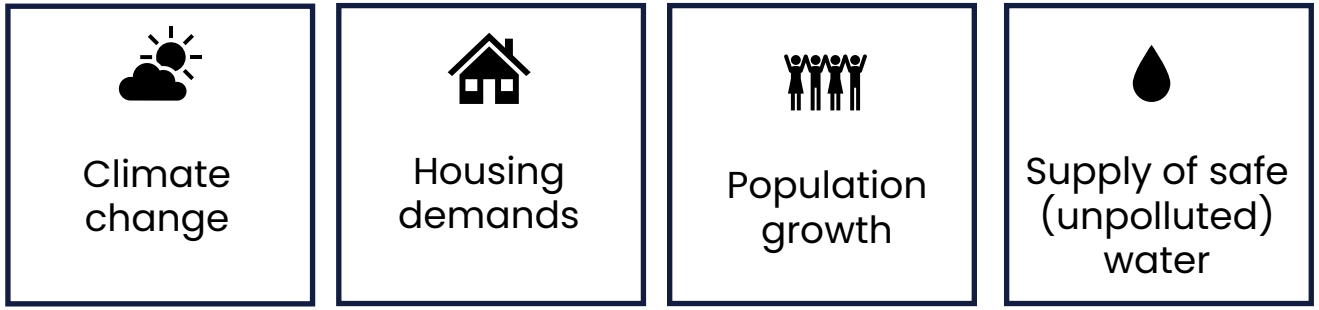
Supply and demand

The supply demand deficit is well understood and unsurprising to most

›Feelings towards the supply demand deficit

- The supply demand deficit is well-understood; most are unsurprised by (or familiar with) the concept, reflecting growing awareness of wider factors such as climate change
- There is recognition that this represents a significant challenge for the future that needs to be mitigated now
- Specific details are surprising to some, such as the amount of water lost through leaks, or the fact that water is transferred from Severn Trent. One was surprised there was a deficit at all, as they thought there was enough water to meet all demands

›Factors most felt to influence the deficit



"I think that water supply demand deficit is that if there isn't enough action taken now, in the future there could be water shortages based on the fact that demand for water in the area is increasing due to various factors like population increase."

- Male, 18-24, West Yorkshire

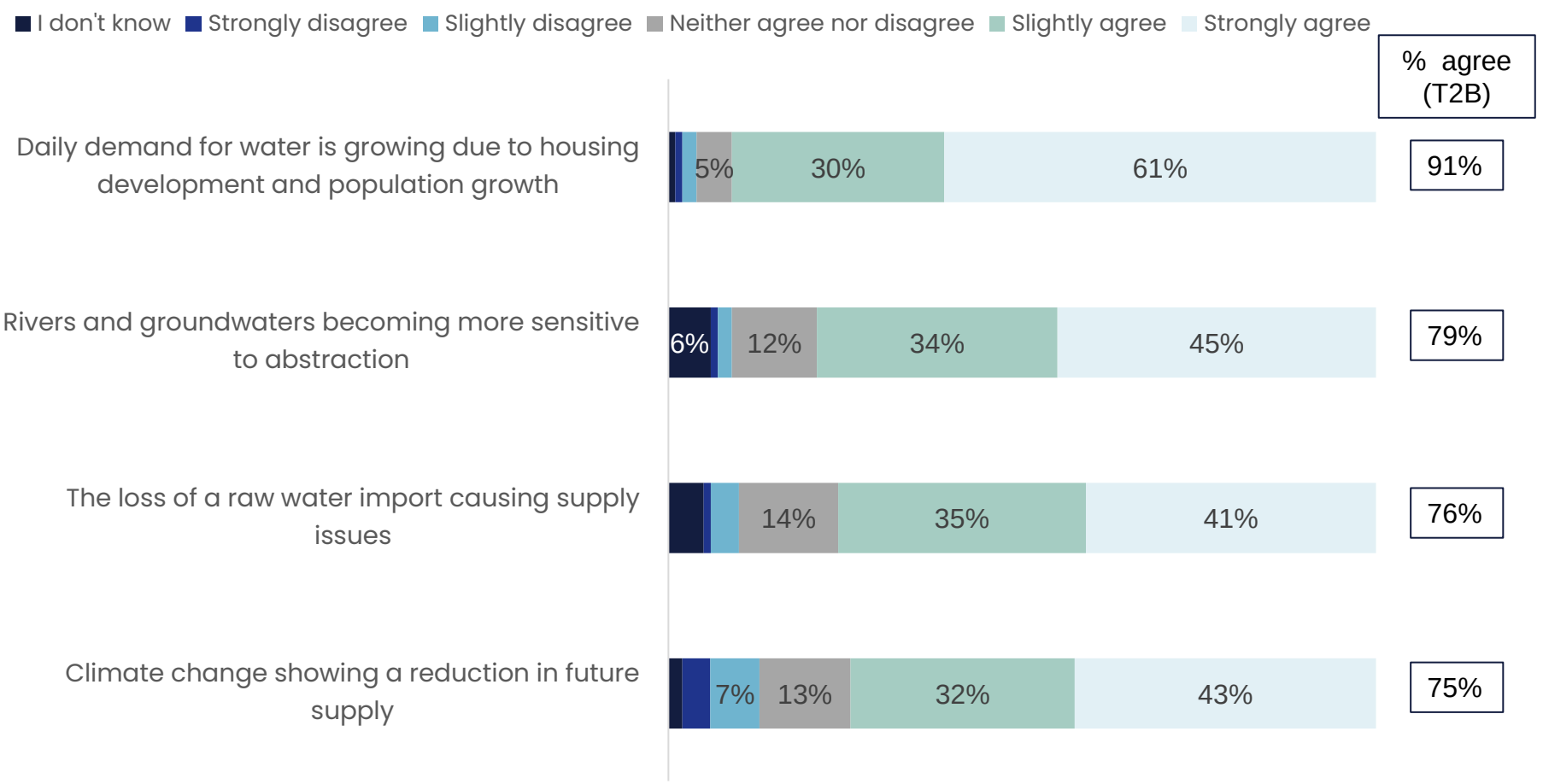
"My understanding is that the supply-demand deficit is a measure of how the demand for water will exceed supply in the future if measures are not put in place to mitigate against this. Factors influencing this include climate change (in particular the increase in droughts), population growth (including new housing etc.) increasing demand for water, sustainability issues and the loss of supply from Thames water from 2035."

- Female, 45-54, West Yorkshire

Source: Discussion (Base 22)

Housing development and population growth are seen as the biggest threats to future water supplies

›Level of agreement with future water supply challenges



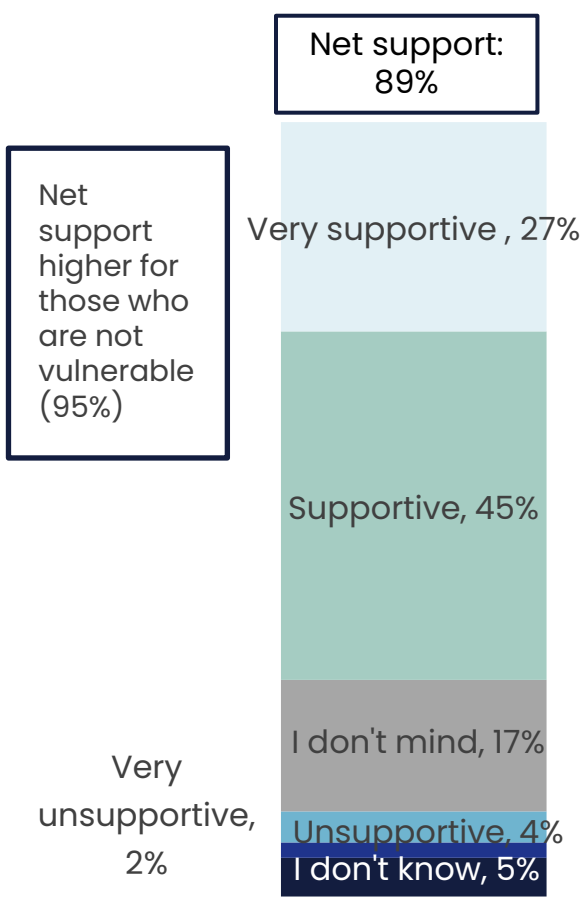
- 55+ more likely to strongly agree (70%)
- Non vulnerable more likely to (net) agree 96%

- Females (80%) and ABC1 (80%) more likely to (net) agree
- 55+ less likely to (net) agree (68%)

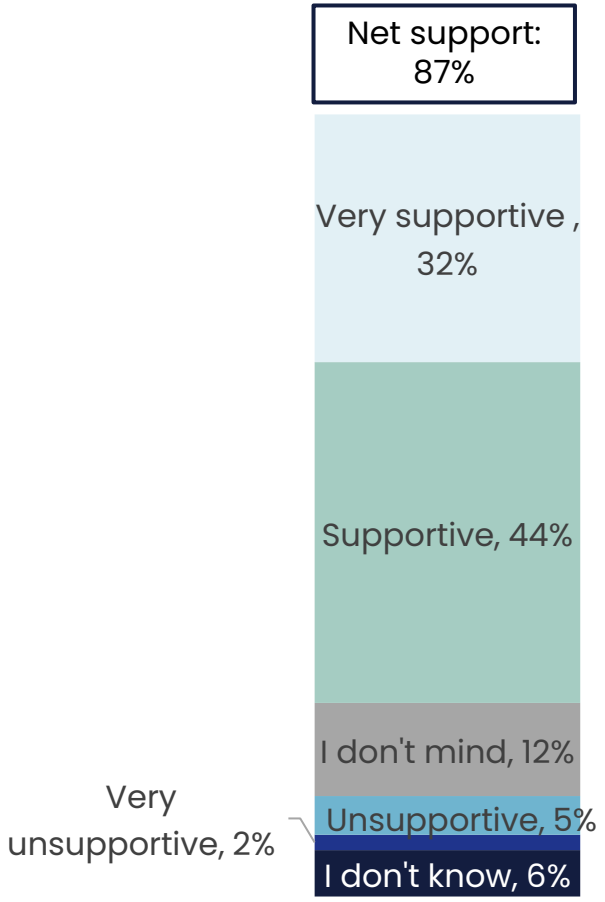
Q11: Please tell us how much do you agree or disagree that the below areas are challenges facing our water supply in the future. Base 626

Support is high for both the timeline of the plan and the balance of supply and demand measures

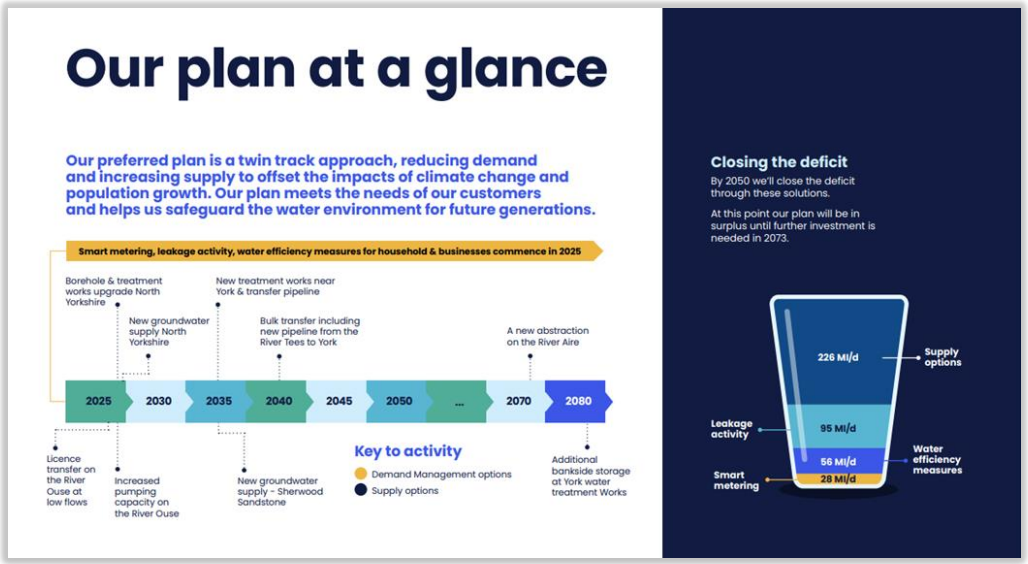
›Support for high level plan elements



Support for general direction and timeline



Support for balance between supply and demand



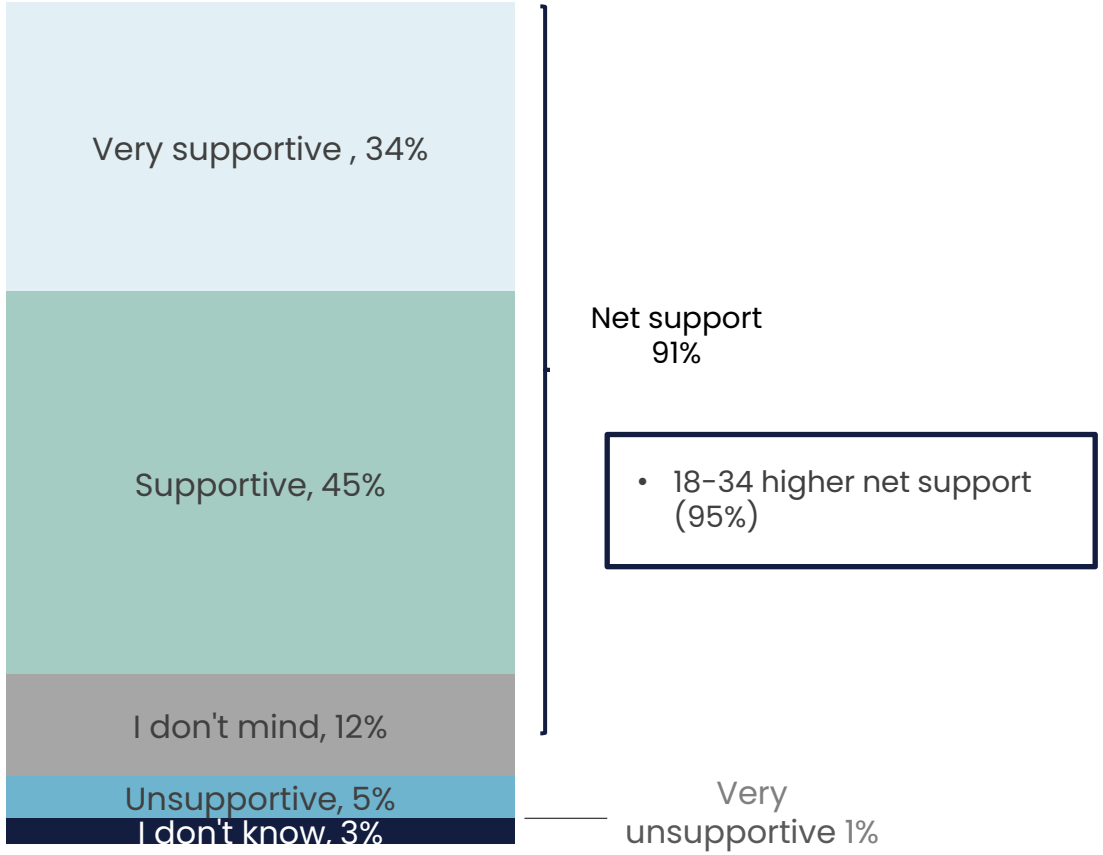
Key insight

Lower support amongst those who are vulnerable may reflect the fact that some have medical or other water needs, which could make it more difficult to reduce their household's usage. This audience may need reassurance that this will be considered in the execution of the plan.

Q12: Please let us know how supportive you are of each of the following...?. Base 626

Support for demand reduction plans is high, especially with younger customers

›Support for plans to reduce demand



> *"Because implementing these measures in a coordinated way can help reduce demand for water and increase the region's resilience to future deficits."*
>
> - Male, 25-34, East Riding

Q14: How supportive are you of the plans outlined for reducing the demand for water specifically? Base 626

While reducing leaks is seen as a crucial step, feelings towards smart meters are more mixed

› Why supportive of demand reduction plans?

For many, the demand reduction plan effectively reflects the joint responsibility between Yorkshire Water and customers to improve water efficiency.

- Leaks are top of mind for many, so addressing this is welcome
- Many are supportive of metering, feeling this will encourage households to behave more responsibly and make it easier to reduce usage
- There is positivity around businesses being mentioned and not only households
- The necessity of taking these steps to ensure a sustainable supply in the future is acknowledged

› Why unsupportive of demand reduction plans?

Smart meters however are not universally welcomed; some resent the idea of having to reduce their water usage

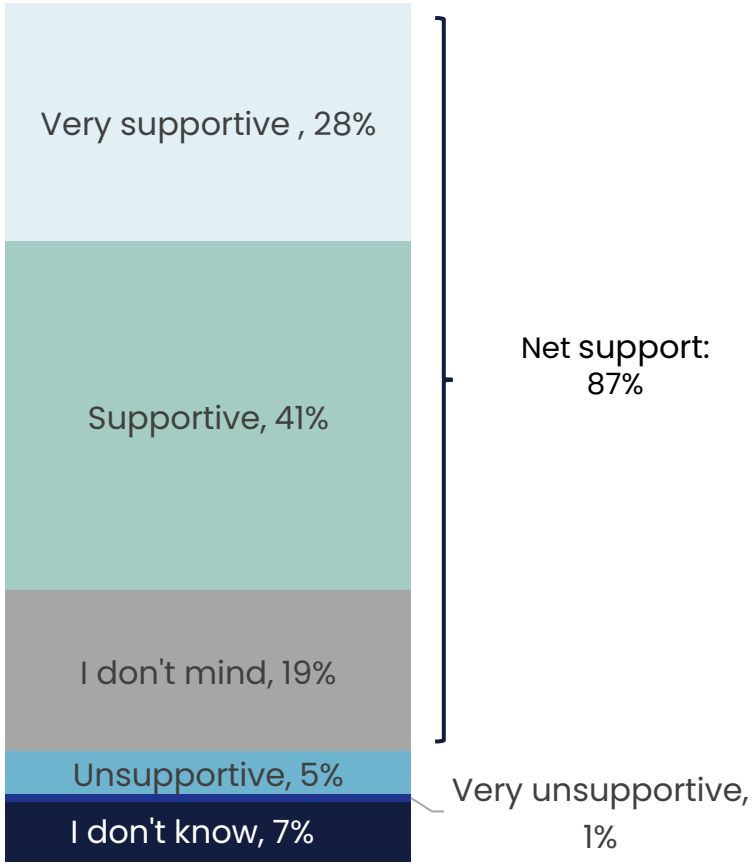
- Some are concerned that customers will not have a choice about smart meters, with some questioning their reliability
- There are also concerns that water will be rationed/households made to reduce the amount that they use
- To some, it feels like YW are shifting the responsibility to customers rather than taking necessary actions themselves
- Some also feel that the leak reduction targets do not go far enough

> *"We need to reduce the amount of water used overall. The best way to do this is to improve and repair infrastructure whilst encouraging/educating customers to reduce their usage."*
>
> - Female, 65+, East Riding

Q15: Can you please explain why you say this? Base 626

Support for supply increase plans is also high, though slightly more are neutral or unsure

›Support for supply increase plans



Key insight

Slightly lower strength of feeling for supply increase initiatives compared to demand reduction reflects a lower level of understanding of these approaches and their implications. While the direct impact that initiatives such as smart metering will have on customers is easy to grasp, concepts such as bank storage and groundwater supply are unfamiliar and less tangible.

> *"Seems great solutions that won't cause too much disruption as the majority of the work will be located underground."*
>
> - Female, 35-44, North Yorkshire

Q16: How supportive are you of the plans outlined for increasing water supply specifically? Base 626

While many don't feel qualified to comment on the details, most broadly trust YW's expertise in this area

› Why supportive of supply increase plans?

While customers feel less qualified to comment on supply increase plans, they broadly trust that Yorkshire Water has developed a sensible plan.

- At a broad level, customers think the plans seem thorough, logical and achievable – some specify that they trust YW to make the best decisions in this area
- Customers are often reassured when they see initiatives taking place in their direct local area
- Few comment on the specific details of the plan, reflecting the fact that most are not particularly familiar with the details of these types of initiatives

› Why unsupportive of supply increase plans?

Those not supportive feel addressing unnecessary demand caused by leaks should be a bigger focus than implementing new supply measures

- With leaks being a top-of-mind issue for many, they question whether this should be resolved before implanting new supply measures
- Some are unsure whether the plan is achievable. This includes questions around whether drought will make abstraction more difficult in the future
- A small number question the environmental impact of the plan, in relation to measures such as boreholes and abstraction

> *"I am very supportive of these proposed solutions because they seem like they will help increase the supply of water to our region which is important as demand increases due to population etc."*
>
> - Male, 18-24, East Riding

> *"Why extract water from rivers? Won't the rivers already be short of water if we're in a drought situation? It seems more spin than solution."*
>
> - Male, 55-64, South Yorkshire

Q17: Can you please explain why you say this? Base 626

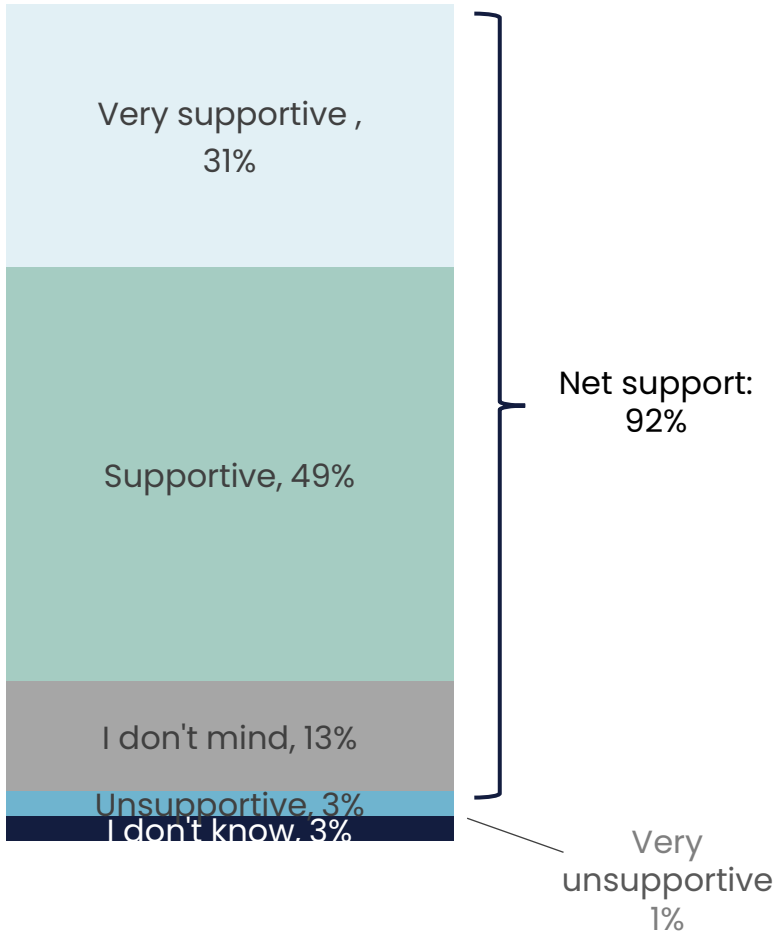
Drought resilience

Drought measures

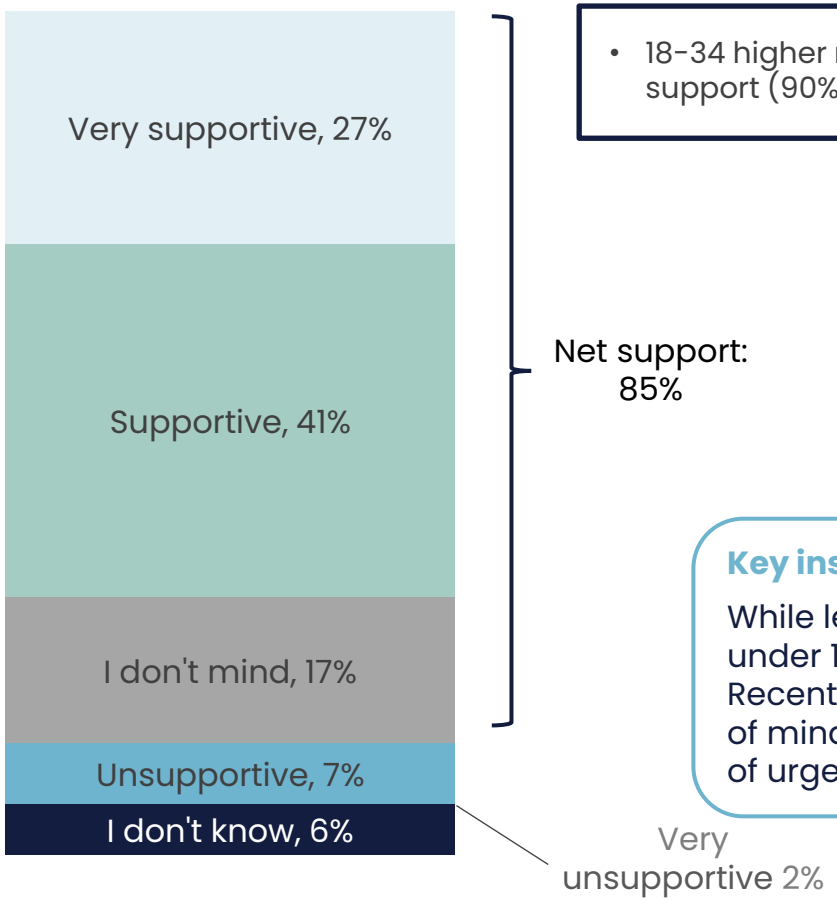
The combined benefits of demand reduction and new supplies increases our resilience to droughts and by 2040 we'll be resilient to extreme droughts with a return period of 1 in 500 years (a 0.2% annual chance of happening). Our plan will also reduce the likely need for drought actions including temporary use bans, non-essential use bans and supply-side actions that temporarily restrict demand or increase the volume we abstract.

Over 90% support the drought resilience target; support is slightly lower for the timeline (though still high)

›Support for drought resilience target



›Support for drought resilience timeline of 2040



- 18-34 higher net support (90%)

Key insight

While levels of support are high overall, just under 1 in 10 are unsupportive of the timeline. Recent extreme weather events are still top of mind for some, creating a greater sense of urgency around this issue.

Q18: Please let us know the extent to which you are supportive of each of the following...? Base 626

Those supportive feel climate change is unpredictable and the plan gives reassurance, even if targets are far away

› Why supportive of drought resilience plans?

Those supportive are concerned about the impact of climate change and feel that it's important to take steps now to reduce the future impact of droughts.

- The impact of climate change is becoming more noticeable, and more droughts can be expected in future
- It's reassuring to have a plan and to see that actions are being taken, even if this takes time
- The timeline feels realistic and doesn't overpromise – positive impact cannot be expected overnight
- It's good to have a clear timescale/ end date in mind

"There is growing resentment of statutory hosepipe restrictions and scepticism about the extent to which they are or can be enforced. In the context of a growing population, ageing supply infrastructure and other pressures it is important to plan to prevent drought."

Male, 55-64, West Yorkshire

"We need to future proof our water supply, again though I don't think too much emphasis can be laid on consumer demand."

- Female, 55-64, West Yorkshire

"There is a time lag when putting large infrastructure in place and getting people to change their behaviour."

- Female, 55-64, North Yorkshire

"2040 is only really 15/16 years away. Excellent technology is already in place to achieve these targets. They seem completely achievable."

- Male, 35-44, West Yorkshire

Q19: Can you please explain why you give this level of support to the plan to tackle drought resilience? Base 626

Those unsupportive would like to see action taken sooner to reflect what's perceived as the fast pace of climate change

› Why unsupportive of drought resilience?

Those unsupportive often feel that action should be taken sooner, while others think uncertainty around climate change means a fixed plan over this timelines is unrealistic.

- This is a pressing issue, so the timeline for action and targets needs to move forward
- The climate and associated challenges are changing so quickly that different actions and targets may be needed and a whole new plan put in place before 2040
- Interest and price increases over the years mean the plan will cost more the further away it is
- There are mixed messages with climate change as to which is more likely, drought or flooding – this makes some cynical/ question what the priority should be

"One minute we are being told that climate change will result in drought then it will result in floods."
- *Male, 65+, East Riding*

"I agree on the plan, but 2040 is still a long time away and climate change is happening now, and we may suffer repeated drought conditions in that period."
- Male, 45-54, West Yorkshire

"Things need to happen more quickly. A 15-year plan will be out of date before it happens."
- Male, 45-54, West Yorkshire

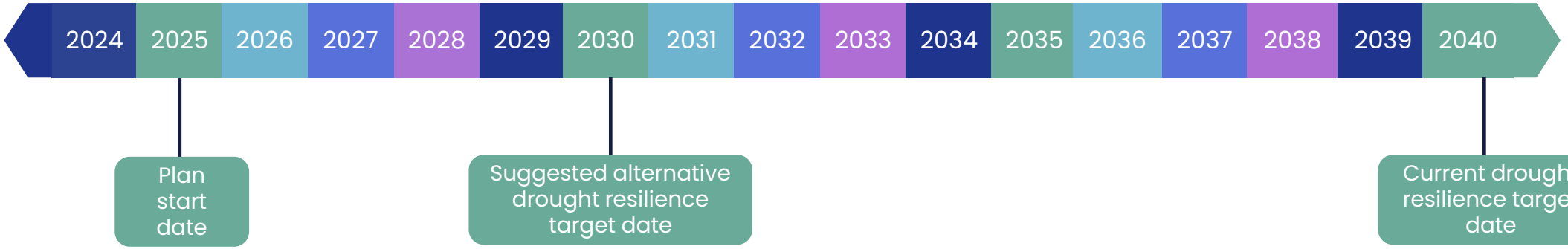
"I am supportive of the plans but not of the time period."
- Female, 45-54, South Yorkshire

> *"It's all based on unknown factors, and we have seen so much change lately, we just don't know what is round the corner."*
>
> - Male, 45-54, West Yorkshire

Q19: Can you please explain why you give this level of support to the plan to tackle drought resilience? Base 626

2030 is most mentioned as an alternative drought resilience target date by those who feel 2040 is too far away

› Feedback on the drought resilience timeline



"People need to see change and action now. 2040 is a long way off. I know things take time, but even showing short term improvements within 5 to 10 years."

- Female, 55-64, South Yorkshire

"It is highly likely that the plan will slip, so set an earlier target, say 2030."

- Female, 55-64, West Yorkshire

"By 2030 you should have more steps done, mostly about preventing leakage, treat waters and recycle and treat natural sources of water like rain. Also provide population education and mandatory water saving features."

- Female, 35-44, West Yorkshire

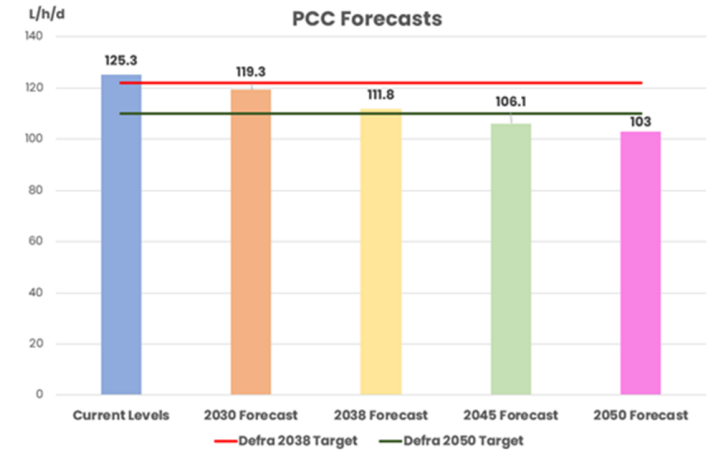
Q20: You say are not supportive of the timeline, for 2040 being the right time for the target to be met. Could you please explain why you say this, and when you think the plan needs to be completed by? Base 56

PCC targets

For the final questions, we'd like to understand how supportive you are of Yorkshire Water's Per Capita Consumption (PCC) targets. PCC is the average daily water use per person in the UK. The PCC target is the figure that Yorkshire Water are aiming to reduce this to. Please read the below information about this before moving on to answer just two questions on it.

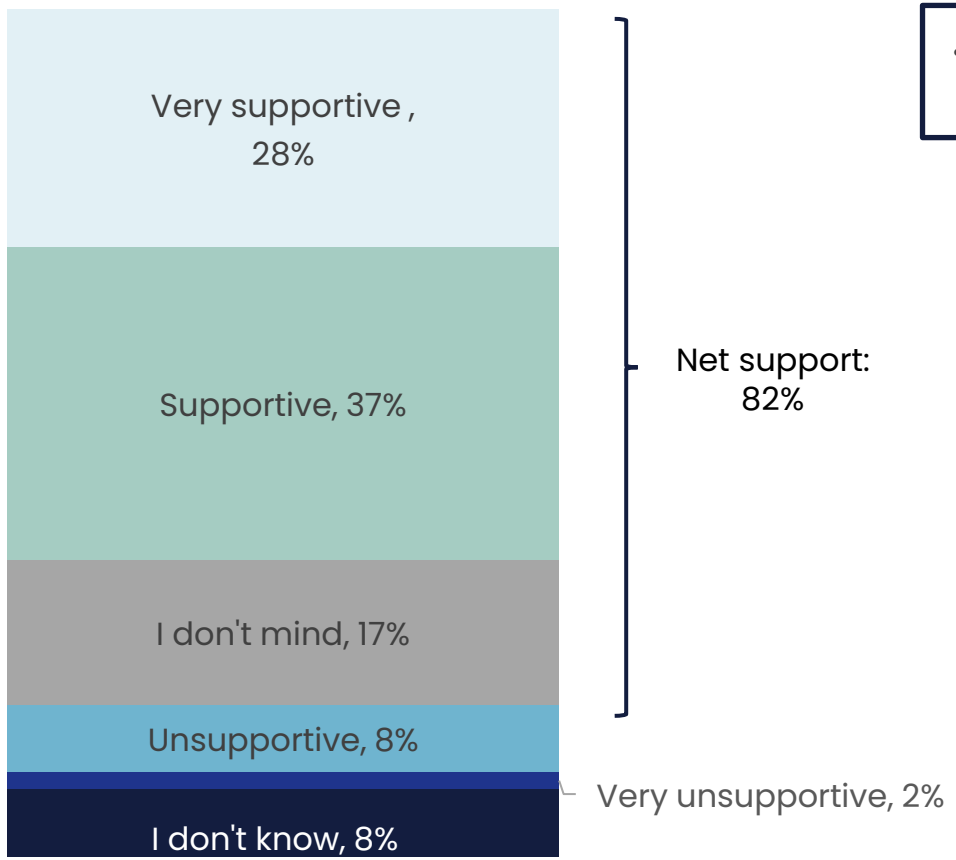
Per Capita Consumption

- PCC is the average daily water use per person in the UK. Water companies are incentivised by Ofwat to reduce PCC to help ensure the longevity of our water resources.
- In the current 5-year planning period (2020-2025), Yorkshire Water failed to meet the target for PCC. This was due to several factors – specifically the impact of Covid-19 which led to an increase in home working and water usage, both during and since the pandemic.
- As part of the WRMP, Yorkshire Water consider PCC targets that have been set by the Department for the Environment, Food and Rural Affairs (DEFRA).
- DEFRA have set a target to reduce the number of litres of water used, per person, per day (l/h/d) to 122 l/h/d by 2038, and to 110 l/h/d by 2050. Yorkshire Water's WRMP aims to exceed these targets in both 2038 (111.8 l/h/d) and 2050 (103 l/h/d).
- You can see the PCC figures Yorkshire Water are aiming for below. They are designed to be ambitious but achievable, and take into account the impact of Covid-19 and increased home-working.



Support for PCC targets is high, though slightly lower than other elements of the plan

>Support for PCC targets



- 18-34 are more supportive (91%)

Key insight

While the majority are supportive of PCC targets, this is one of the lower performing areas of the plan. This reflects mixed feelings towards Yorkshire Water placing the onus on customers to reduce their usage as well as questions around how and whether it can be achieved.

> *We all have to think more carefully about how much water we use. It is a precious commodity and essential to life. We all must use our water in this light, it is precious and could be a scarce commodity if we are not very, very careful in our use.*
>
> - Female, 65+, North Yorkshire

Q24: Taking all of this information into account, how supportive are you of the per capita consumption targets that have been set by Yorkshire Water as part of the WRMP? Base 626

There is acknowledgement that improvements will take time; the timeline is therefore felt to be fair

› Why supportive/unsupportive of PCC targets?

While many don't have strong feelings towards the specific targets/timeline, they feel positive about the fact that YW has a clear plan to reduce usage over time.

- Many reiterate again that they feel this is an important aim and that there is scope to drive greater efficiency to reduce demand
- Some feel reassured that the timeline is realistic and reductions gradual, acknowledging that meaningful change takes time to realise
- A smaller number specify that they applaud YW's ambition in seeking to exceed DEFRA's target

"The targets set by YW are ambitious and the fact that they exceed DEFRA requirements is to be applauded."

- Male, 55-64, North Yorkshire

Where people are unsupportive this often reflects concerns that customers will be required to reduce their usage

- Some feel the reductions can only be achieved by placing unfair pressure on households to limit their usage
- This links to a general concern around how achievable the targets are, with some questioning why YW would seek to exceed DEFRA's targets
- Others, however, would like to see YW doing more sooner to address this important issue

"Cutting private water usage is an intrusion into people's lives."

– Male, 35-44, North Yorkshire

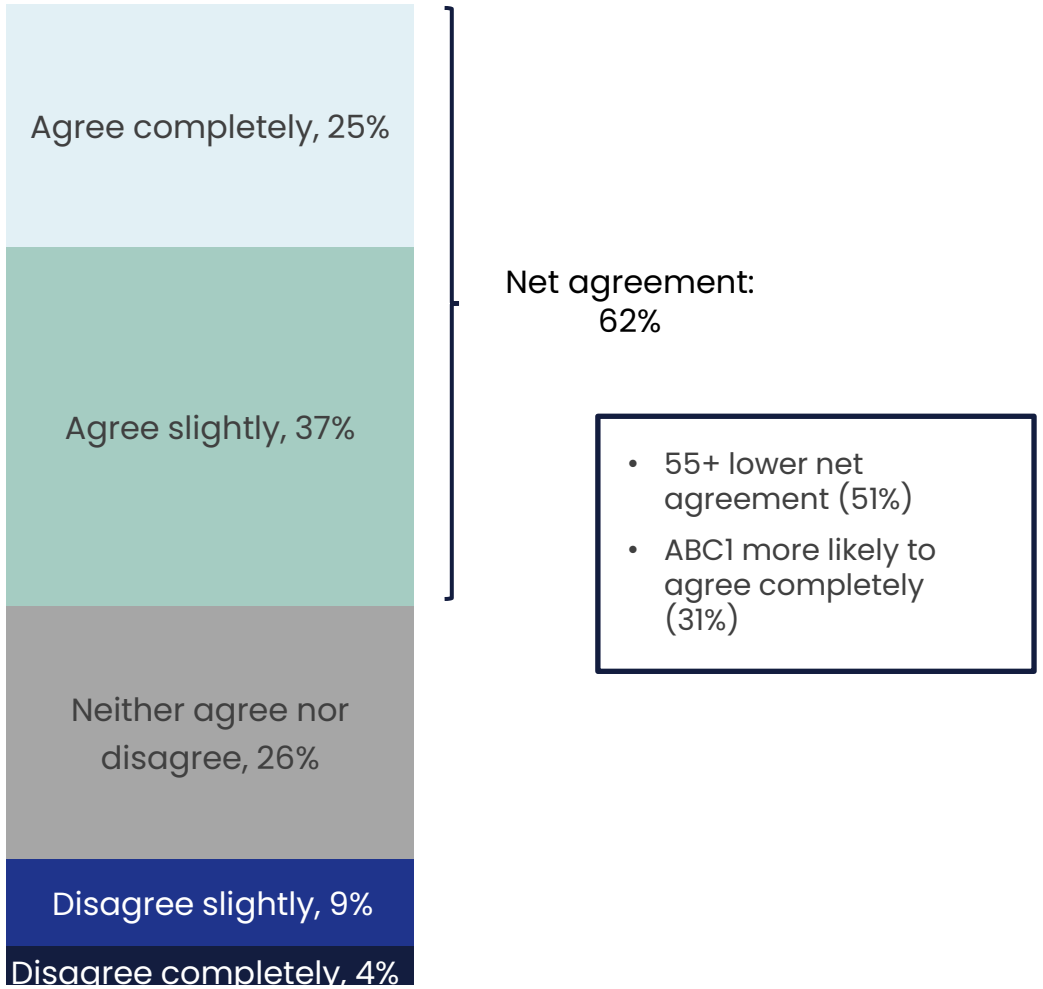
"I do not believe anyone has a right to impose rules that set an amount of water used by a person per day. It seems draconian to say a person is only allowed a certain amount of water per day."

- Female, 55-64, South Yorkshire

Q25: Please could you explain why you say this? Base 626

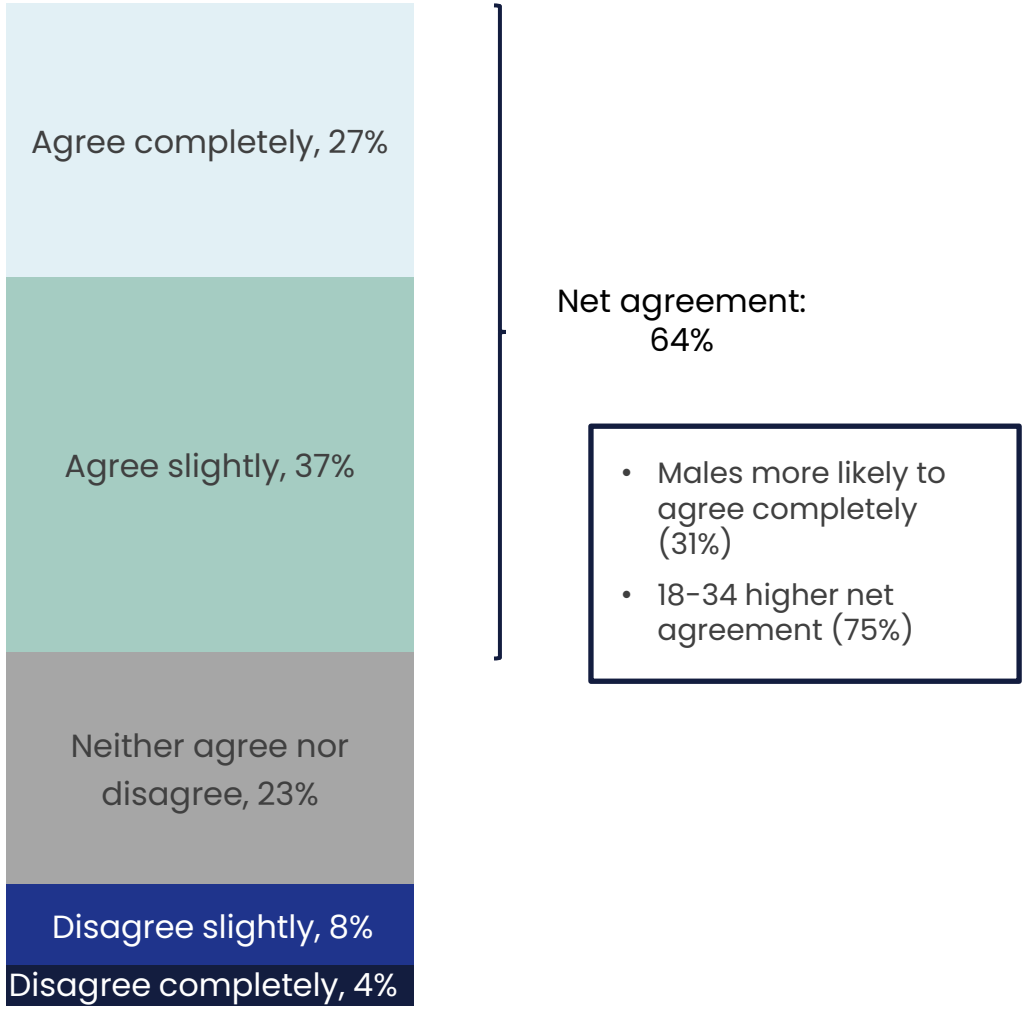
Around two thirds agree that targets are achievable and that timelines for doing so are ambitious

›Agreement that targets are achievable



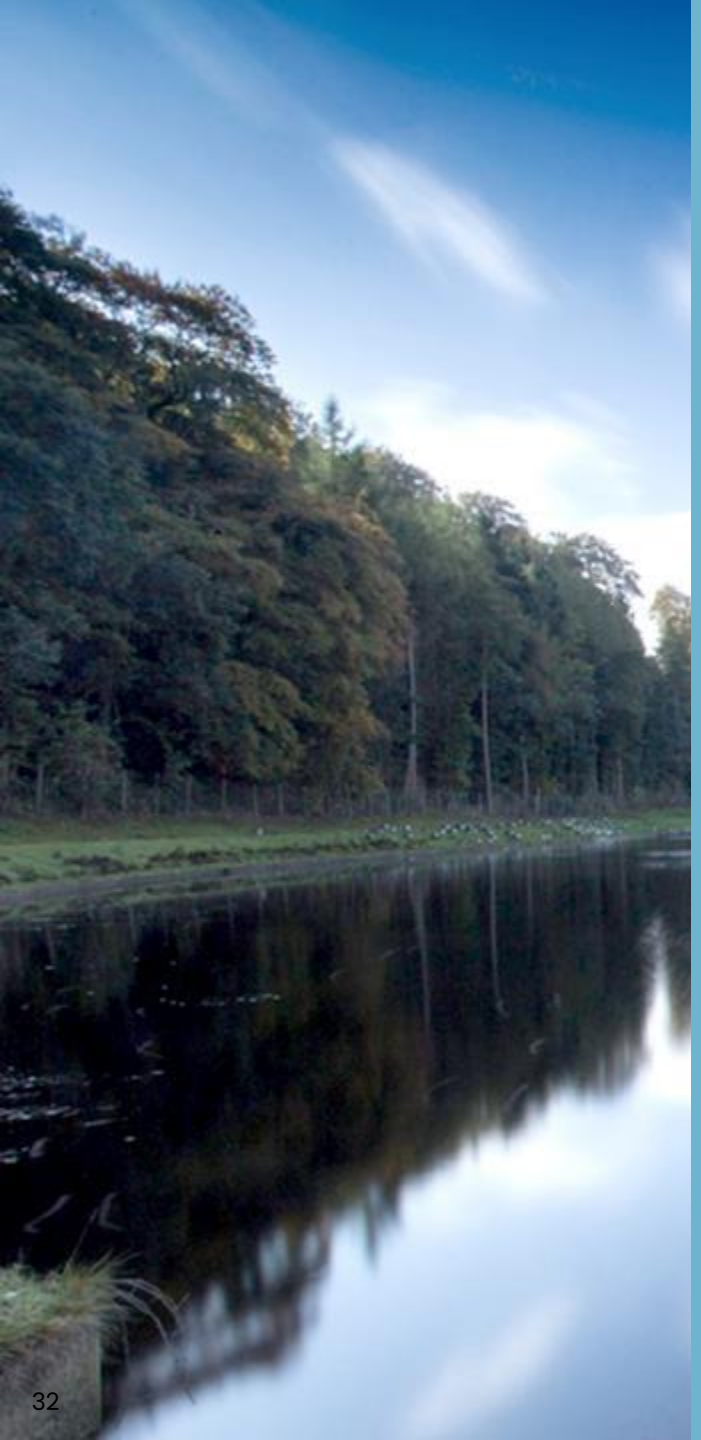
- 55+ lower net agreement (51%)
- ABC1 more likely to agree completely (31%)

›Agreement that dates for targets to be met are ambitious



- Males more likely to agree completely (31%)
- 18-34 higher net agreement (75%)

Q26: Please give your level of agreement to the following statements. Base 626



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With over 3,000 members, Your Water is an online research resource giving you easy access to consumers

The community offers a wide range of conventional and innovative research techniques and approaches.

Our aim is to approach every project with fresh thinking and apply methodologies that we truly believe will get you tangible, actionable results.

Any questions?

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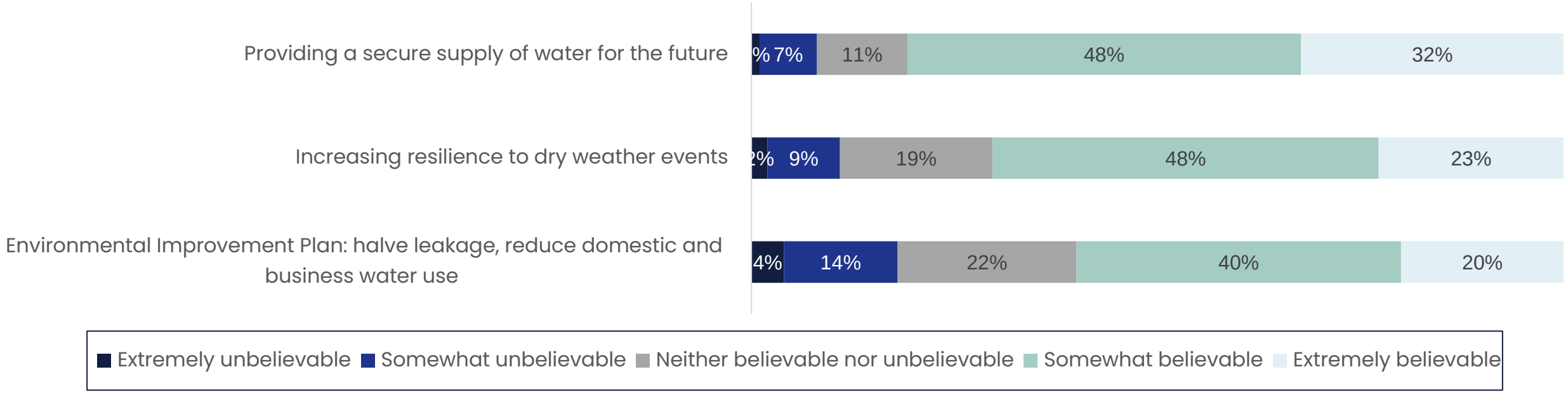
Appendix

Believability of each aim outlined in the plan

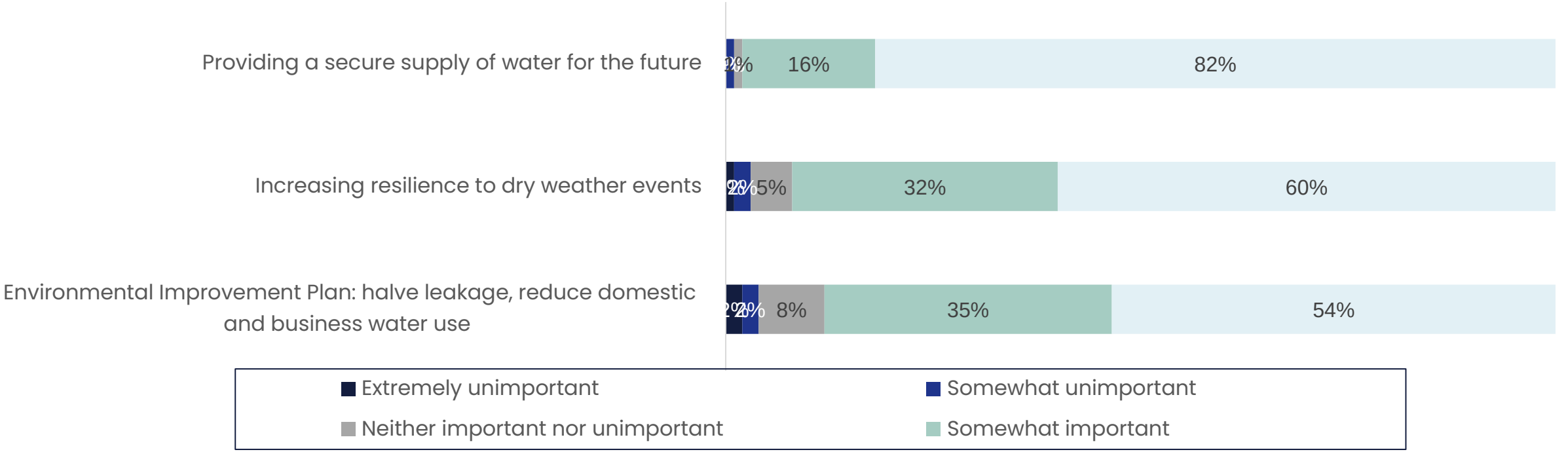
›Believability of aims



Q10: Based on what you read, how believable is it that Yorkshire Water's plan will meet each of the following aims. Base 626

Importance of each aim outlined in the plan

>Importance of aims



Q9: lease tell us how important you feel each of the aims outlined are. Base 626

Sample Profile: Survey (unweighted data, n= 626)

GENDER

- Male: **44%**
- Female: **55%**

AGE

- 18-24 years: **5%**
- 25 - 34 years: **15%**
- 35 - 44 years: **16%**
- 45 - 54 years: **16%**
- 55 - 64 years: **23%**
- Over 65: **25%**

SEG

- ABC1: **62%**
- C2DE: **38%**

AREA OF YORKSHIRE

- South Yorkshire: **26%**
- West Yorkshire: **47%**
- East Riding of Yorkshire: **12%**
- North Yorkshire: **15%**

(COMMUNITY ONLY)

HOUSEHOLD SIZE

- 1 person household: **23%**
- 2 person household: **42%**
- 3 person household: **18%**
- 4 person household: **12%**
- 5 or more person household: **6%**

WATER METER

- Have water meter: **65%**
- Don't have a water meter: **33%**

VULNERABILTY

- Vulnerable customer: **42%**
- Non-vulnerable customer: **58%**

Sample Profile discussion (n= 22)

GENDER

- Male: **10**
- Female: **12**

AGE

- 18-24 years: **2**
- 25 - 34 years: **2**
- 35 - 44 years: **2**
- 45 - 54 years: **3**
- 55 - 64 years: **7**
- Over 65: **6**

HOUSEHOLD SIZE

- 1 person household: **7**
- 2 person household: **8**
- 3 person household: **4**
- 4 person household: **2**
- 5 or more person household: **1**

SEG

- ABC1: **13**
- C2DE: **9**

AREA OF YORKSHIRE

- South Yorkshire: **6**
- West Yorkshire: **8**
- East Riding of Yorkshire: **5**
- North Yorkshire: **3**

WATER METER

- Have water meter: **17**
- Don't have a water meter: **5**

VULNERABILTY

- Vulnerable customer: **9**
- Non-vulnerable customer: **13**