Customer view on Storm Overflows Consultation

May
2022

InSites Consulting

Background

Objectives

A government-led Storm Overflow Taskforce was created to tackle the issue in England. They explored options to reduce the occurrence of storm overflow spills and any harm that it causes, working with water companies, regulators, environmental groups, and the Consumer Council for Water. They commissioned a report describing the impact that each option would have on customers and the environment. Defra have now released a consultation calling for responses to the proposed plans, including three targets, and Yorkshire Water feel it is important to explore this with customers.

The research aims to understand…

- Customers' views on the proposed plans set out by Defra
- If customers support the outline approach
- If they want rivers that support wildlife and ecosystems (i.e. removal of the environmental harm of storm overflows)
- If they want rivers that are clean enough to swim/paddle in
- If they're happy to fund this, given the fact that making these improvements will cause a bill increase from 2025 onwards
- Customer views on the current timelines proposed vs. having a longer period of time to hit the targets proposed with reduced bills.

Methodology

We ran a survey on the Your Water community

DATE: 4th – 6th May 2022

202 members of the community took part

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Stimulus shared: Explanation of storm overflows

This context was shared at the start of the survey

Combined sewers channel foul water from homes, as well as surface water from roads, roofs etc. Storm Overflows (or Combined Sewer Overflows) are Environment Agency permitted safety valves built into the combined sewer system to discharge excess wastewater to rivers, lakes, or the sea when rainfall exceeds capacity. Storm overflows spill a dilute mixture of rainwater and raw sewage into rivers and the sea. When these are used, it's known as a storm overflow 'discharge'.

Discharges from storm overflows contain a mixture of rainwater and dilute raw sewage which can contain harmful pathogens, such as viruses and bacteria. Storm overflows can also lead to environmental harm due to their impact on water chemistry. The discharges can also contain other pollutants such as microplastics, pharmaceuticals, nutrients, and heavy metals, as well as visible litter that is flushed down toilets. The impact of sewage discharges on ecology varies depending on the pollutants it carries, their concentration, and the nature of the receiving water body. The smaller and more dilute the sewage discharge, and the larger and faster flowing the receiving river, the lower the ecological impact.

Although storm overflows can be harmful to the environment, they protect properties from flooding, and prevent sewage backing up into homes and streets during periods of heavy rainfall. However, population growth and climate change has caused increased pressure on the system and discharges are likely to increase into the future as a result.

Storm overflows are a legacy of sewer design and construction practices until the second half of the twentieth century. They were a pragmatic and affordable means of draining towns and cities. Newer sewers (for example on new housing estates) are now typically built as separate surface water (rainwater falling on roofs and drives) and foul water (used water flushed down sinks and toilets) however in practice if there is no nearby river or waterbody to drain the surface water to, it will sometimes connect to the combined sewer system further downstream. The building of new storm overflows does not happen very often to prevent further harm to rivers or the sea.

Summary of Findings

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Key insights & recommendations: Attitudes & Awareness of water quality

Key insights

Sea & River Swimming

- Customers view river and sea health as being important, primarily to support wildlife and so that they look clean. Just under 3 in 4 feel it's important for river/sea health to be improved to provide healthy habitats.
- Around a third of participants are river/sea swimmers. Swimmers tend to rely on their own judgement to know if water is safe to swim/paddle in. Those who don't swim are mostly discouraged due to concerns about the cleanliness of the water, particularly so for rivers.
- There's a perception that regional water companies and the Environment Agency are mainly responsible for river/sea health and water quality in the UK; improving river water quality is seen as the top investment priority for water companies.

Storm Overflows

- Understanding of storm overflows is relatively low, and when provided with information, it elicits negative emotions – namely dissatisfaction, disappointment, and sadness.
- Three quarters haven't heard of the consultation on storm overflows. But when hearing about it, they are enthusiastic and happy that something is being done.

Recommendation

- ✓ Campaigns around improving aquatic plant and animal health may have greater cut through than for human benefit.
- ✓ When communicating with customers, emphasise that Yorkshire Water know improving water quality is a top priority for customers, so they are working to achieve that.

- ✓ Educate customers on what storm overflows are and why they need to be overhauled, to help justify any investment.

Key insights & recommendations: Response to the targets

Key insights

- Overall, customers are largely supportive of the proposed targets, especially around the environment and public health. However it's hard for customers to understand the scale of the challenge, and therefore why it will take so long to achieve.
    - Target 1 (the environment) is strongly motivating – customers value the environment highly; however the 2050 deadline feels too far away.
    - Target 2 (public health) is received very positively, and the 2035 target is a good one. But there is concern about the addition of disinfectant to rivers/seas, particularly around the impact it will have on wildlife. Additionally the flex that 2-3 discharges could still occur is a concern.
    - Target 3 (heavy rain only) is a bit less motivating than the other two targets; it's a little more technical and harder to engage with.

Recommendation

- ✓ Across all targets, customers will benefit from receiving more information about what is involved, why it will take the time proposed, and why the cost is justified. Make these available for customers who wish to find out more.
- ✓ To help customer understanding if sharing details on the targets…
    - ✓ Put more emphasis on the 2035 timeline in Target 1, and reassure that water quality will be improving along the way, not just in 2050.
    - ✓ Reassure customers by providing them with information on the disinfectant and discharges mentioned in Target 2, and what it going to happen.
    - ✓ Keep technical jargon to a minimum in any information shared, but ensure reassurance is given on how improvements will be implemented Customers will benefit from information about the technicalities and the implementation, and use this as reassurance.

Key insights & recommendations: Views on cost increases

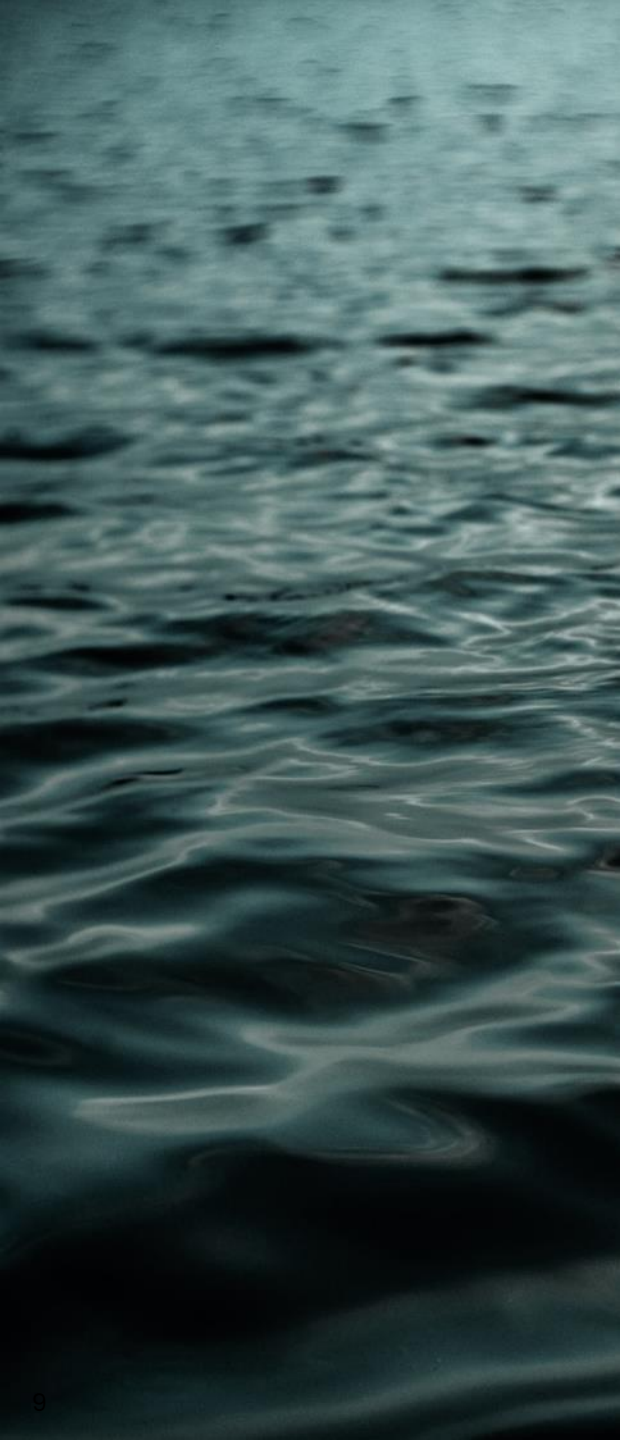
Key insights

- Unsurprisingly, information about predicted bill increases elicits negative emotions – namely disappointment and dissatisfaction for a third.
- But River/sea health is a high priority and around three-quarters feel just as supportive or more so after learning about the cost increase.
- Whilst customers fully support improvements to water quality, they're not sure why it's customers' responsibility to pay; and 60% of customers spoken to say they would struggle to pay for the increase.
    - This is also based on the current cost estimates, making it hard to comprehend the impact on personal finances in 5-10 years time.
- Opinions over timescales are ambivalent; in an ideal world they would be sped up to improve water quality quickly, but without having to pay for them, due to the current cost of living crisis.

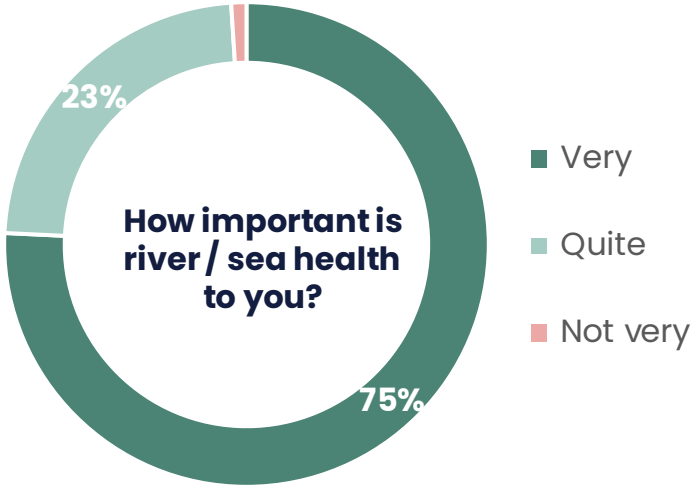
Recommendation

- ✓ If the proposed targets go ahead, comms need to focus on the benefits and reasons why this action is needed at this time, to help reassure, and strengthen customer support.
- ✓ Whilst the exact impact on households is still a relatively unknown factor, it's inevitable these costs will be prohibitive for some - support will need to be in place for those unable to cover the costs right from the point of introduction to avoid undue concern.
- ✓ If pushing back on timings/suggesting extended targets, Yorkshire Water will need a very clear rationale and action plan to show why this is better, or risks being seen to be avoiding responsibility.
- ✓ In addition, further explanation as to investment being made by Yorkshire Water and other bodies responsible would also help, to demonstrate shared onus on making change for the greater good.

Context – attitudes to swimming and water quality



Virtually everyone thinks river and sea health are important to protect wildlife



Which of the following statements would you say is most important to you?

73% Improvements to river/sea health ensure that they **provide healthy habitats for aquatic plants and animals**

14% Improvements to river/sea health ensure that they **look and smell clean with no litter or residues present**

39% Improvements to river/sea health ensure that they are **safe for people who wish to swim/paddle**

Why is river/sea health important to you?

I want to support wildlife	**91%**
I want them to look clean	**70%**
I want to swim, paddle	**58%**

Key insight

Providing healthy habitats for aquatic plants and animals is seen as the priority reason to improve river/sea health and appears to be strongly motivating. Improving for personal benefit or the benefit of humans is considered far less important – so campaigns centred on improving plant and animal health may have greater cut through.

q1: Before we get into the detail, how important is river and sea health to you? [Base 202]
q2: Why is river / sea health important to you? [Base 202]

Around a third sometimes swim in rivers or the sea, but many are discouraged due to cleanliness concerns

Rivers

29% river swimmers

The idea of swimming and paddling in rivers is appealing for many, but concerns about pollution and cleanliness stop many from doing so.

There's a widely held perception that rivers are "dirty" and not safe to swim in. Some are revolted by the notion.

> *"Exciting and so good for your mental wellbeing but sadly too dirty at the moment"*
>
> *"Less enthusiastic than I used to be when I was younger. I worry about pollution and untreated sewage in the water, and run off from farmers fields"*

The sea

33% sea swimmers

There is greater openness to swimming in the sea.

However, some also worry about cleanliness, although to a lesser extent. Other concerns involve: general safety (is there a lifeguard? What's the tide doing?), cold temperature.

> *"Essential part of the seaside experience for all to enjoy without pollution being a fear"*
>
> *"A bit worried they are not clean"*

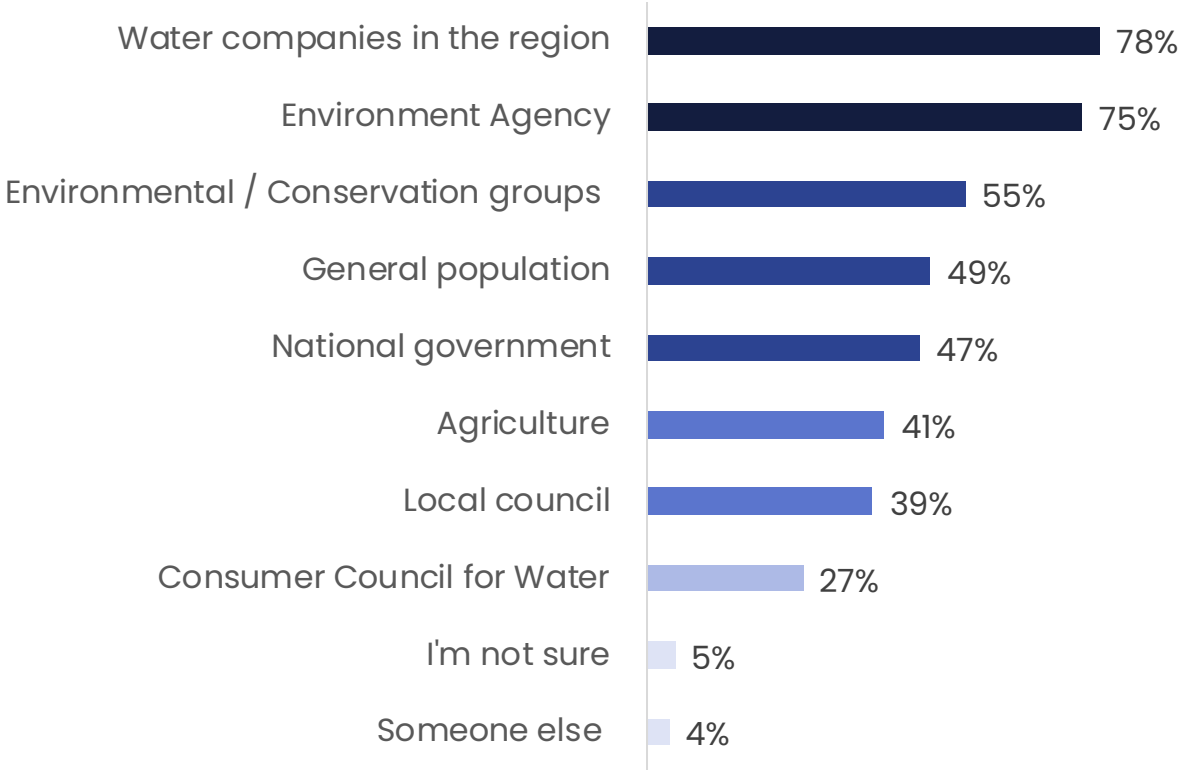
There's high overlap between river and sea swimmers

For those who do swim, they rely most on signs around the water or their own judgement to know if the water is safe to swim or paddle in.

q4: How often, if at all, do you ever swim or paddle in any of the following during the summer months? [Base 202]. q5: How do you feel about swimming or paddling in rivers? Why is this? q6: And how do you feel about swimming or paddling in the sea? Again, please tell us why. q7: How do you know if the water is safe to swim or paddle in? [Base 6-62]

Most think regional water companies and the Environment Agency are responsible for river health

Who do you think is responsible for river health and water quality in the UK?



How important do you think it is for water companies to invest in each of the following areas?
(Average ranked position out of 6)

Improving river water quality	**2.6**
Reducing sewer flooding	**2.8**
Improving/maintaining infrastructure	**2.9**
Education around saving water and preventing blockages	**3.9**
Working towards net-zero & other sustainable practices	**4.3**
Providing good service for customers	**4.4**

Key insight
Use this importance of improving water quality when communicating plans with customers, emphasising how Yorkshire Water knows it's a top priority for customers.

q9: Who do you think is responsible for river health and water quality in the UK? [Base 202]
q10: How important do you think it is for water companies to invest in each of the following areas? [Base 202]

Awareness of Storm Overflows

Understanding of storm overflows is relatively low, but elicits negative emotions

Does the term 'Storm overflows' mean anything to you?

36% **"don't know" what 'storm overflows' means at all**

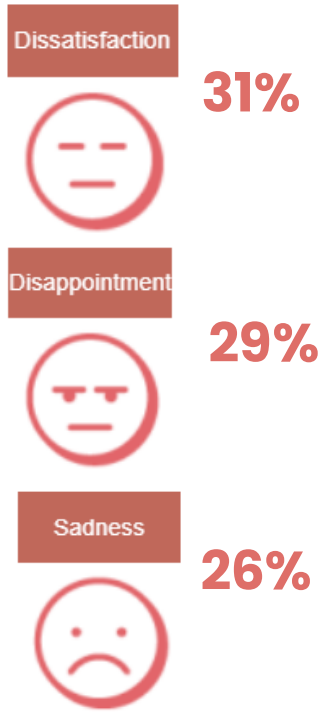
Those who say they know what 'storm overflows' means (or who hazard a guess!) say it has to do with heavy rainfall overwhelming the system.

Some know it means excess water (including sewage) is released into rivers to avoid flooding.

However, some think it refers specifically to water being released into flood plains, while others think it refers to rivers flooding, or flooding generally.

> *"When there is a storm and the sewer/drains overflow due to heavy rainfall? "*
>
> *"I believe Its after heavy rain and sewerage escapes into rivers and seas"*
>
> *"When sudden unexpected downpours in rain and some rivers burst their banks causing flooding"*

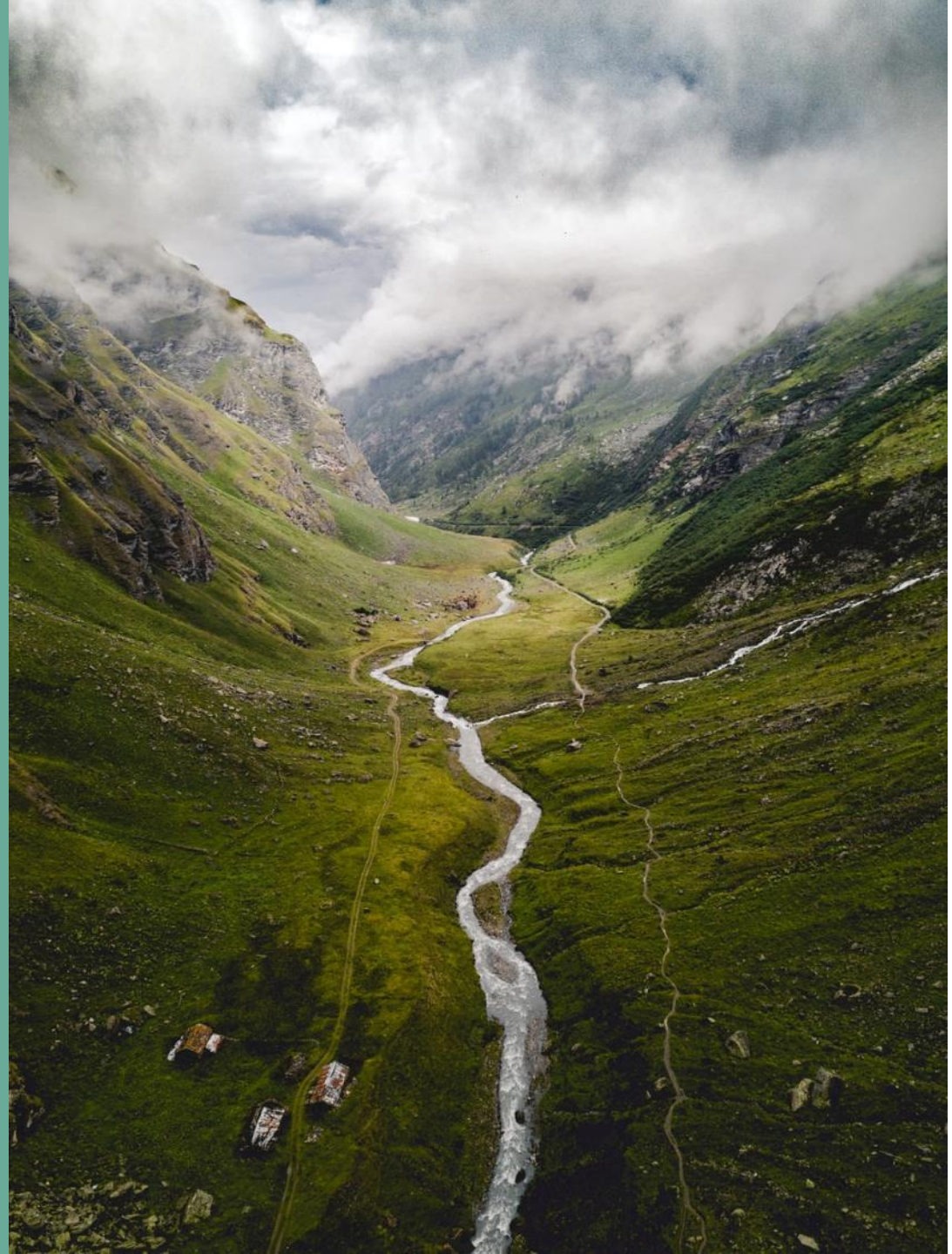
How does this information on storm overflows make you feel?



> *"I had no idea that any raw sewage could be sent into rivers and the sea. I'm shocked and saddened"*
>
> *"I think I knew it happened really but try not to think about it and put to back of mind- but it is disgusting when you actually see it!!"*
>
> *"It is a pity that there is no reasonable alternative to this system."*

q11: Does the term 'Storm overflows' mean anything to you? Please tell us in your own words below anything you know about them and where you've heard this from? [Base 202]. q12: How does this information on storm overflows make you feel? [Base 202]. q13: What do you think about this information? Is any of this new news to you? [Base 202]

I am disappointed that we don't feel that it is important enough to put the serious investment into upgrading infrastructure to separate the two streams better. I realise it will be very expensive, but it is vital for the health of our water which means the health of us all



Most haven't heard of the consultation, and many are pleased to learn about it

Before today, were you aware of this consultation on Storm overflows?

76% No, I haven't heard of it

16% Yes, I've heard of it, but don't know many of the details

8% Yes, I've heard of it and know the details

What are your initial thoughts after learning about the consultation?

- Many are **enthusiastic and pleased** to learn about the overhaul – they think it's a priority issue and needs to be done.
- Some are **disappointed** they didn't know about the consultation.
- Some are **wary** about it actually happening, getting done competently, and have little faith in the government, water companies, and consultations.
- At this stage some question where the funds will come from and **anticipate it will be very costly.**

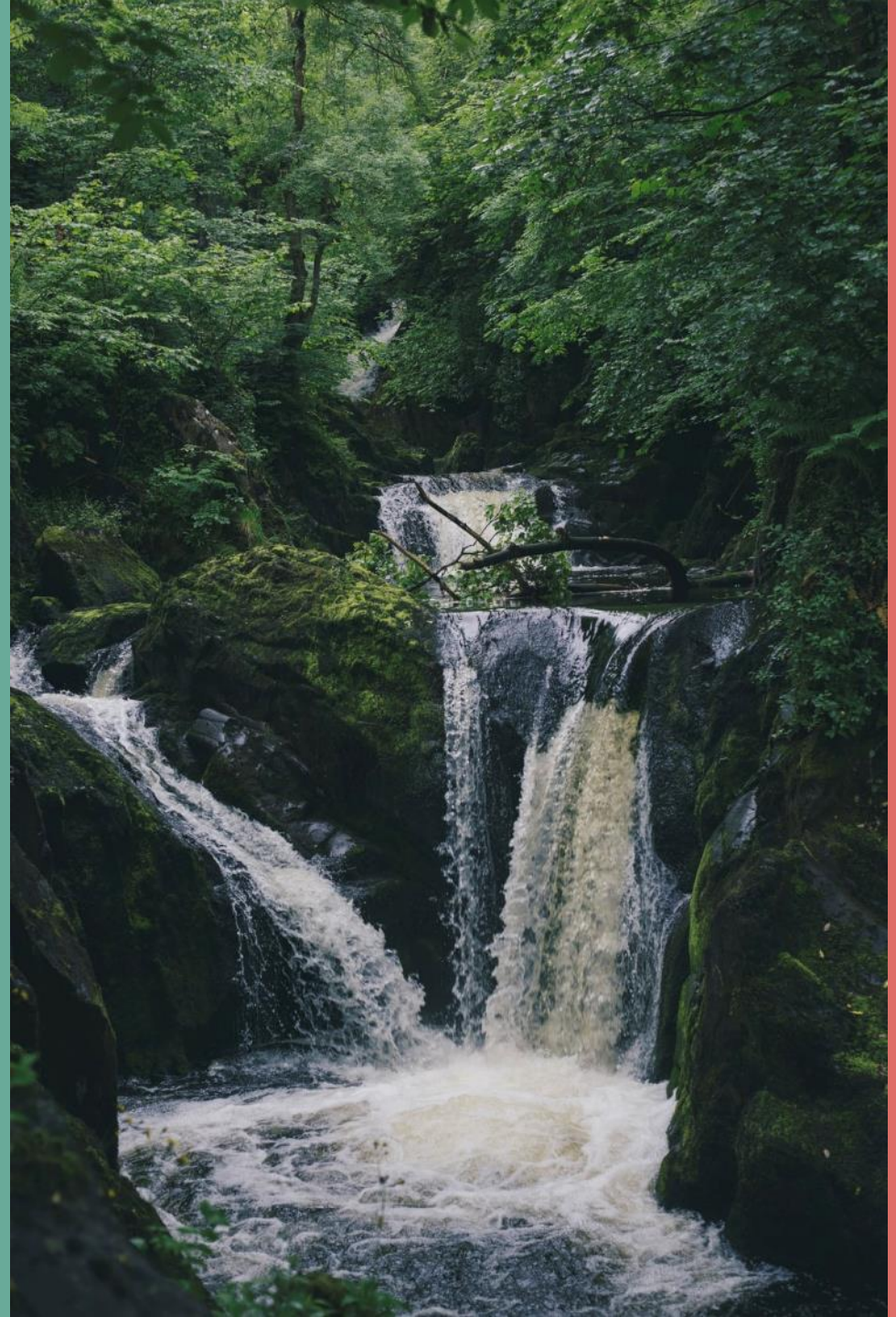
Key insight

There's an education piece here that needs to be carried out to clearly and succinctly explain what storm overflows are to the public and why they need to be overhauled, to help justify any investment. Since this will come as 'news' to many, it's important to explain the rationale for why the system is in place (to avoid flooding) and give an aspirational vision of the future and what will be achieved with overhaul (cleaner habitats for plants and animals, children swimming in rivers etc.). A little historical context could help to soften the blow – the rivers/seas are far cleaner than they were a century ago, huge progress has been made, and now we need to make the final push...

> *If Storm Overflows have such a bad impact on the environment they should be reduced by any means possible. Climate change and biodiversity should be our number one priority.*
>
> *Excellent, I just hope the right people (qualified, experienced people) are passionate & hard working enough to carry this through.*
>
> *I think the old sewage systems and the increase in population/floods etc will make it difficult to improve things without a huge input of finance.*
>
> *It will probably be pointless and ignored, just like most consultations.*

q14: Before today, were you aware of this consultation on Storm overflows? [Base 202]
q15: What are your initial thoughts after learning about the consultation?

It is a necessary thing to be looked at and I am heartened that Yorkshire Water is keen to consult its customers about it too. We have to know what is going on.



Its a good thing but should have happened before this. Water companies should have been taking action to stop storm overflows and not wait for government to take action.

Feedback on targets

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Stimulus shared: Three targets

Target 1

Protecting the environment

Water companies will only be permitted to discharge from a storm overflow where they can demonstrate that there is no local adverse ecological impact to the river water.

Timeline: This must be achieved for all storm overflow sites by 2050

- A gradual implementation
  - The headline target must be achieved for most (75%+) of all storm overflows discharging in high priority sites by 2035. (A priority site is, for example, Sites of Special Scientific Interest)
  - It must be achieved for all (100%) overflows discharging in or close to high priority sites by 2045.
  - Water companies must plan to achieve this target for all remaining storm overflow sites by 2050.
- This target will mean that no water body in England will fail to achieve good ecological status due to storm overflow discharges. It will protect biodiversity at both a local and national scale. It will result in the complete elimination of ecological harm from storm overflows.

Target 2

Protecting public health in designated bathing waters:

For storm overflows near designated bathing waters, water companies must significantly reduce harmful pathogens by either applying disinfection, such as with ultraviolet radiation, or reduce the frequency of discharges to meet Environment Agency spill standards

Timeline – to be achieved at all designated bathing water sites by 2035

- For coastal waters, the Environment Agency spill standard is 3 discharges per season for 'good' status and 2 for 'excellent' bathing water status.
  - Yorkshire Water have 18 designated bathing beaches and are the first water company to have an inland bathing river water designated in Ilkley.
- This new target will require all storm overflows near to existing, or newly designated bathing areas, to comply with this rigorous standard. This will lead to major improvements to an estimated 660 storm overflows nationally discharging to waters used for recreation and leisure. This is expected to reduce discharges from these overflows close to designated bathing waters by over 70% during the bathing season, although significant reductions is expected to occur outside of the bathing season as well.

Target 3

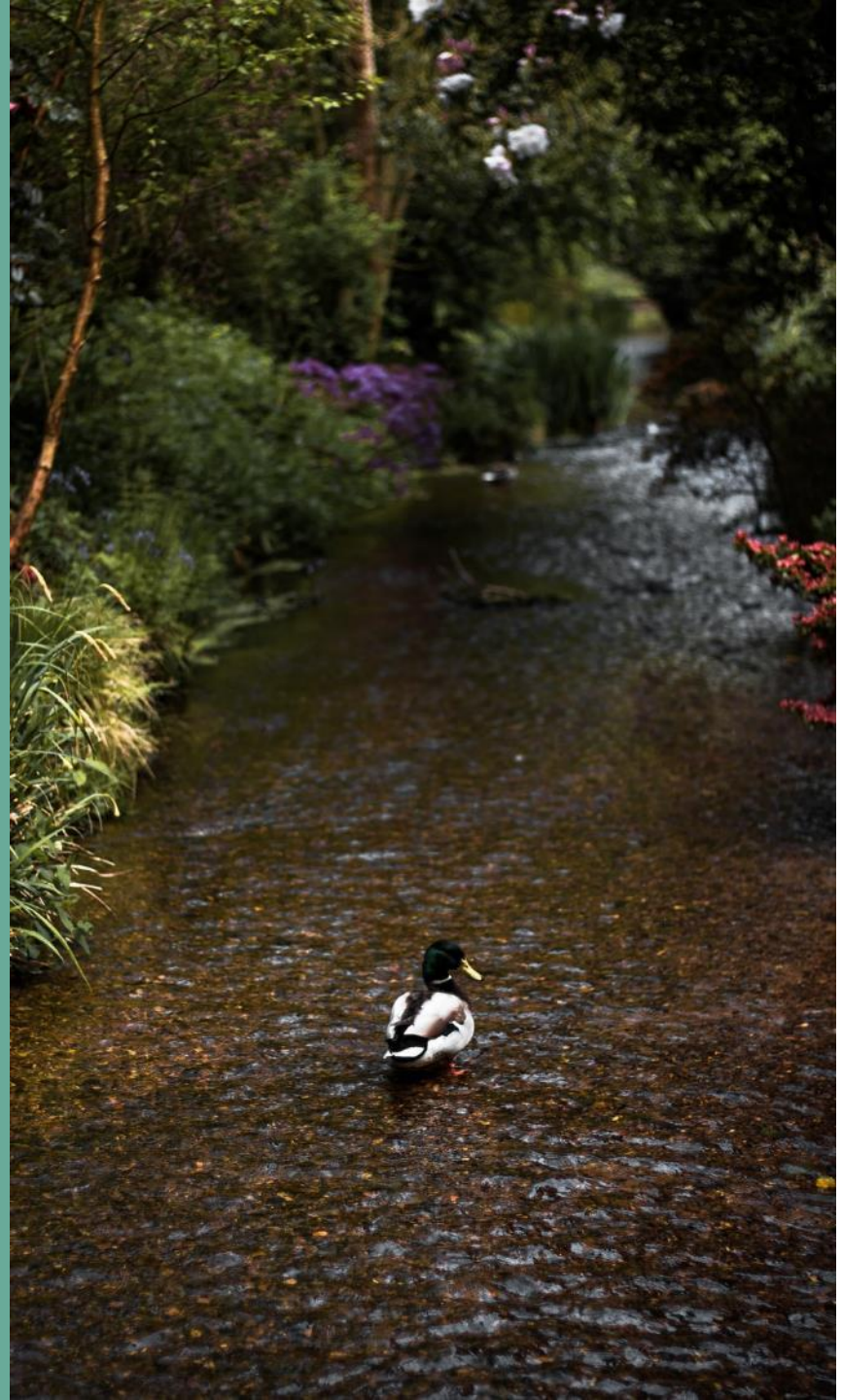
Ensuring storm overflows operate only in unusually heavy rainfall events

Storm overflows must not discharge/spill above an average of 10 rainfall events per year

Timeline – to be achieved in all storm overflow sites by 2050.

- This target ensures that storm overflows would only be used rarely, in the case of unusually heavy rainfall, if at all. These targets are key in protecting public health and wellbeing in areas which are not designated bathing waters. This target applies to all storm overflows discharging to any inland waters as well as those discharging near to any designated bathing waters.
- In addition, water companies must ensure all storm overflows, regardless of where they discharge to, have screening controls to limit discharge of solid materials such as solid faeces, road silt, wipes and other sanitary items which are flushed. This means the screen must be designed and maintained so that it always effectively achieves the solid separation and flow rates that it was designed for. This target must also be met by 2050.

If all targets are met it will ultimately mean that that all rives, lakes and the sea around the UK will be as safe as it can be and will benefit both the environment, natural habitats, people and nature as a whole.



Overall customers are supportive of the proposed targets, especially around the environment & public health

Response to targets

	Target 1 Environment	Target 2 Public Health	Target 3 Heavy rain only
% Feel positive	**57%**	**60%**	**46%**
% Supportive	**79%**	**82%**	**69%**
This is a fair target to set	**60%**	**62%**	**52%**
I expect this will be hard for water companies to achieve	**56%**	**53%**	**52%**
I'd accept that my bill needs to increase to cover investment	**53%**	**49%**	**49%**

- The majority of customers believe these targets will make a big difference to water quality, both for wildlife and swimmers
- However, around half question why bills should increase as a result.
- People want more explanation about how these targets are going to be reached.
- Across all there are mixed feelings about the timescales (more on this to come).

This will make a big difference…

Providing healthy habitats for aquatic plants and animals	**81%**	**74%**	**72%**
Ensuring the water looks and smells clean with no litter/residues	**75%**	**72%**	**71%**
Ensuring the river/sea is safe for people who wish to swim/paddle	**74%**	**75%**	**68%**

42% would be more likely to swim or paddle in the river/sea if these targets were met and there were fewer than 10 spills a year

q16_Lr1/2/3: How do you feel about this target? [Base 202]. q18_Lr1/2/3: How supportive are you of this target? [Base 202]. q19_Lr1/2/3: To what extent do you agree or disagree with the following statements? [Base 202]
q20: If these targets were achieved and you knew that there were less than 10 spills in a year in a particular river/sea, what impact, if any, would it have on your likelihood of swimming or paddling in that river/sea water? [Base 202]

Target 1
Environment

I love the idea of protecting England's water's and the biodiversity of the country

Target 2
Public health

Amazing! I love that Yorkshire has a high rate of clean standard bathing water in both sea and inland river at Ilkley. Knowing that more areas will be in this category by 2035 is brilliant, I hope the target is met before then

Target 3
Heavy rain only

I think it will make a huge difference to the quality of the rivers public health and environmental/habitats. It will mean that this will only happen when absolutely essential so will protect public and animals etc. I am in full support of this target.

The environment target is strongly motivating, but more emphasis could be put on the 2035 target

Response to targets

	Target 1 Environment
% Feel positive	**57%**
% Supportive	**79%**
This is a fair target to set	**60%**
I expect this will be hard for water companies to achieve	**56%**
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This will make a big difference…

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Ensuring the water looks and smells clean with no litter/residues	**75%**
Ensuring the river/sea is safe for people who wish to swim/paddle	**74%**

Many feel very positive about this target
It's specifically aimed at improving the environment, which they highly value.

The earlier 2035 date seems to go unnoticed
Many focus on the 2050 deadline, which is felt to be too far off.

The detail about the headline target being achieved for 75%+ storm overflows by 2035 isn't mentioned and either hasn't cut through or is deemed insufficient. Highlighting this sub-target by placing it as part of the 'Timeline' line may draw more attention to it.

> *"Fantastic target to achieve. There's always concern about the damage done to habitats and ecological systems so any improvements in this area is always going to be positive."*

> *"It is a necessary thing to do but should be achieved earlier than 2050"*

Key insight
People need the rationale of the timescale explained to them and potentially some more explicit reassurance that water quality will be improving along the way (i.e. we don't have to wait for 2050 to have healthier rivers/seas but that is the date that all rivers/seas will be completely clean/as clean as possible)

q16_Lr1: How do you feel about this target? [Base 202]. q18_Lr1: How supportive are you of this target? [Base 202]. q19_Lr1: To what extent do you agree or disagree with the following statements? [Base 202]

The public health target is supported, but there's concern over 2-3 discharges a season and adding disinfectant

Response to targets

	Target 2 Public Health
% Feel positive	**60%**
% Supportive	**82%**
This is a fair target to set	**62%**
I expect this will be hard for water companies to achieve	**53%**
I'd accept that my bill needs to increase to cover investment	**49%**

This will make a big difference…

Providing healthy habitats for aquatic plants and animals	**74%**
Ensuring the water looks and smells clean with no litter/residues	**72%**
Ensuring the river/sea is safe for people who wish to swim/paddle	**75%**

There's a lot of positively about this target

The 2035 target is better than 2050, although many think it's still too far off

There are some mixed reactions to adding disinfectant to rivers/seas

- Some are concerned what impact it will have on wildlife in particular
- Others think it's a more practical solution than trying to eliminate all waste

A few are alarmed that there will be any discharges at all, or want more detail, e.g. on the size of the discharges

There's some confusion over 'out of season' discharges - a few question how much and for how long this will persist

Some think the target is a little limited because it focuses on bathing areas instead of all rivers/seas

> *It would help to reduce harmful pathogens and allow people to swim and enjoy rivers, seas and waterways more*
>
> *Not sure about adding disinfectant to the rivers/sea, this may be OK for families but unsure how this would affect wildlife.*
>
> *Two or three discharges a season seems too many.*

Key insight

Providing a little more explanation about the disinfectant and discharges will reassure people. They're particularly concerned about wildlife safety and need to understand why a limited number of discharges is justified/necessary

q16_Lr2: How do you feel about this target? [Base 202]. q18_Lr2: How supportive are you of this target? [Base 202]. q19_Lr2: To what extent do you agree or disagree with the following statements? [Base 202]]

The third target is a bit less motivating and more explanation is needed around details of implementation

Response to targets

	Target 3 Heavy rain only
% Feel positive	46%
% Supportive	69%
This is a fair target to set	52%
I expect this will be hard for water companies to achieve	52%
I'd accept that my bill needs to increase to cover investment	49%

This will make a big difference…

Providing healthy habitats for aquatic plants and animals	72%
Ensuring the water looks and smells clean with no litter/residues	71%
Ensuring the river/sea is safe for people who wish to swim/paddle	68%

Many agree the target is good and reasonable – they recognise that zero discharges isn't possible and think having a limit is a good compromise

- **However, some disagree and think setting a limit is unrealistic** – how can you predict how much heavy rainfall there will be in a year?
- **Meanwhile, others think the limit is too high!** – these are the ones who think there should be no discharges at all

> *While we would hope for zero discharges, that is going to be almost impossible. This seems like a reasonable compromise, if the other infrastructure is in place.*
>
> *It's a bit unrealistic to set a limit on how many times these can be used in a year.*
>
> *Permitting 10 spills per year does not feel exceptional.*

The detail around cutting the amount of solid waste is appreciated

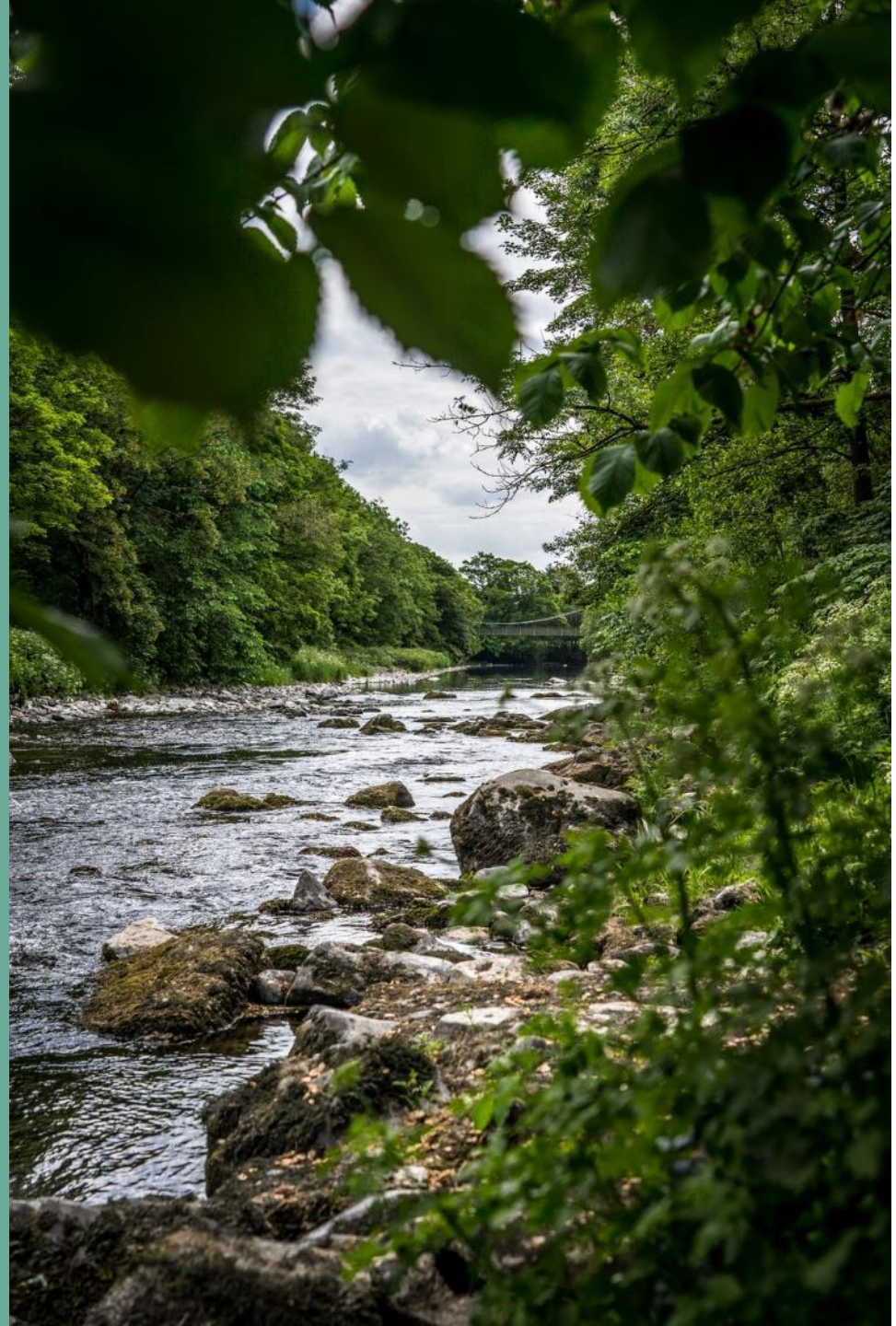
- **But some question how a screen would be sufficient** – they question how it will prevent fine matter from passing through. A few point out the screens will have to be carefully maintained to function well

> *This is a very positive step forward as it cuts the amount of solid waste and plastics that end up in our seas and oceans as well as the rivers that feed them.*
>
> *The screens must be well maintained and cleaned regularly.*
>
> *I don't understand how a screen would prevent road silt being discharged (or any other fine matter).*

Key insight
This target is a little more technical and specific about how the implementation will work. Here too providing a little more explanation will help people understand the rationale and justification

q16_Lr3: How do you feel about this target? [Base 202]. q18_Lr3: How supportive are you of this target? [Base 202]. q19_Lr3: To what extent do you agree or disagree with the following statements? [Base 202]

“It’s important to have targets to make improvements, I don’t understand how it will be achieved though”



Key insight

Across all targets, many are left wondering how the targets will be achieved and what’s involved. They need clear and concise explanations about the mechanics of the improvement process to better understand what’s involved, why it will take so long, and why the cost is justified.

Further context on the relative impact of storm overflow reduction influences support for 1 in 2

…However, sharing this context tends to split opinion down the middle, with just under 1 in 4 *more* supportive and just over 1 in 4 *less* supportive

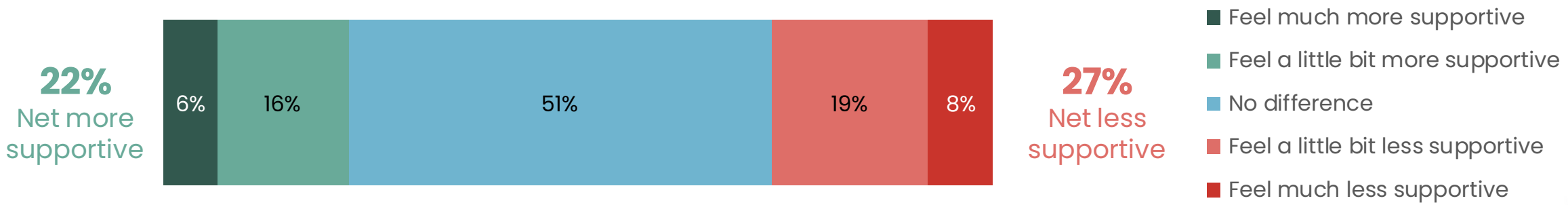
Supporting information provided

Even if all water companies reduce their reliance on storm overflows there is **no guarantee** that the river water quality will be improved. Storm overflows are just one factor which impact river water quality they account for roughly **9% of the failure** of a river to achieve 'good' ecological status.

Here are a few **other contributors** and the approximate impact they make to water pollution as a whole

- Agricultural and rural management (e.g. farming livestock, chemical usage on land/crops which runs in to rivers when it rains) – 36%
- The Water Industry (e.g. Wastewater treatment, water abstraction and overflows) – 24%
- Urban development & Transport – 11%
- Other (e.g. publics misconnected sewers, mining etc) - 29%

What impact does this have on your opinion on the proposed plans?

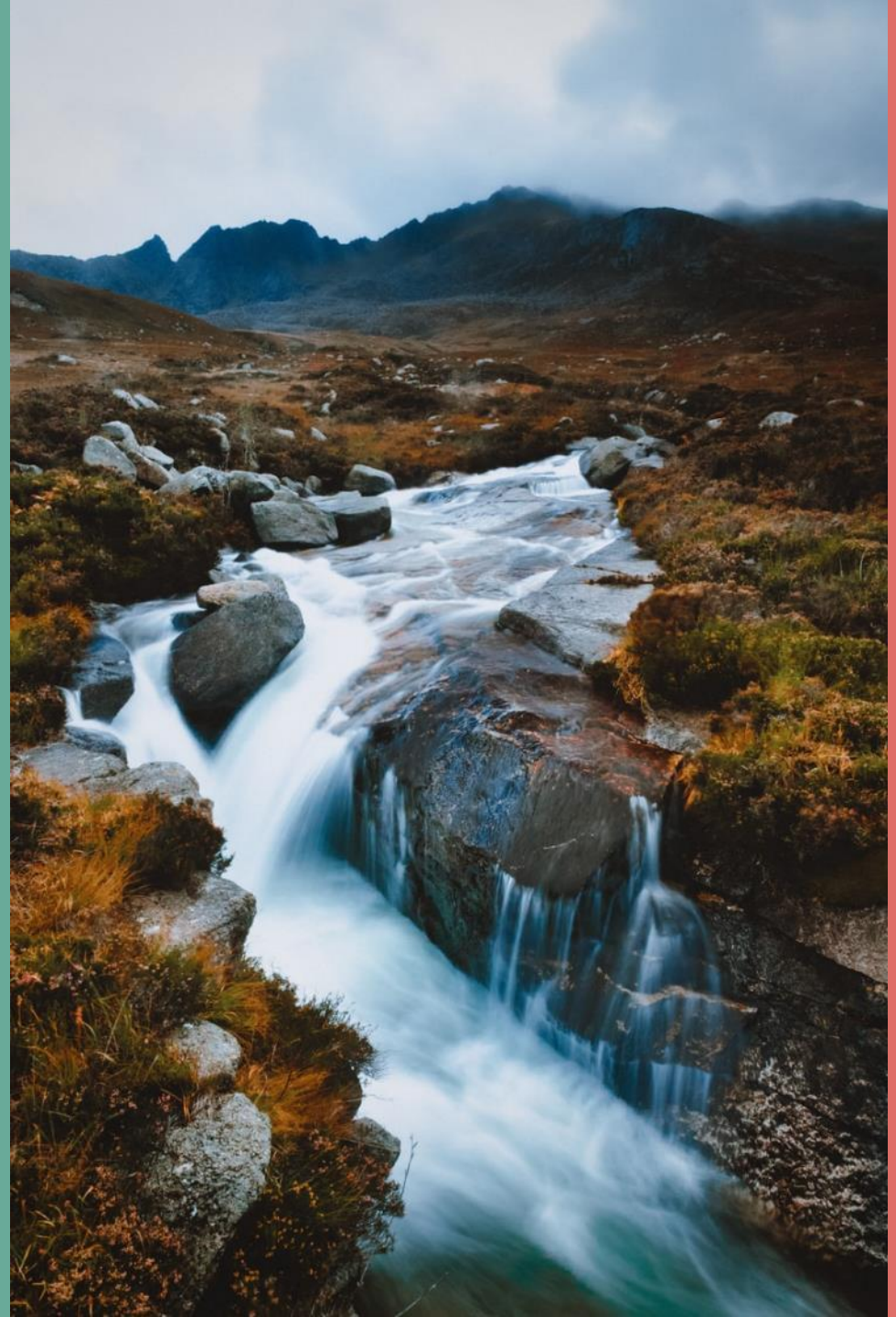


Q26. What impact, if any, does this have on your opinion on the proposed plans to minimise use of storm overflows? [Base: 202]

Response to increased costs

InSites Consulting

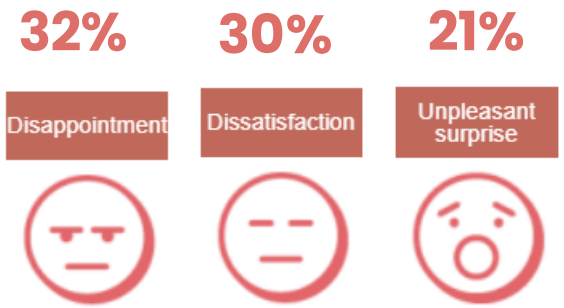
It should all be done but costs are rising for everyone and I do worry about that, but it is important work



If these plans go ahead the customer is paying for the lack of effective foresight on the part of YW

While the cost increase elicits negative emotions, opinion over it is divided

How do you feel about these predicted bill increases that would come into effect from 2025?



- Some express anger directed at the government and at businesses making 'huge profits' who they feel are responsible and should do more/foot the bill.
- The cost of living crisis is also mentioned in this context – this feels like yet another increase.

How do you feel about the estimated increase to your bill from 2025 to 2050?

Neutral – It seems reasonable	**50%**
Too high – I wouldn't be willing to pay that much	**41%**
I don't want to pay anything	**6%**
Too low – I would be willing to pay more	**3%**

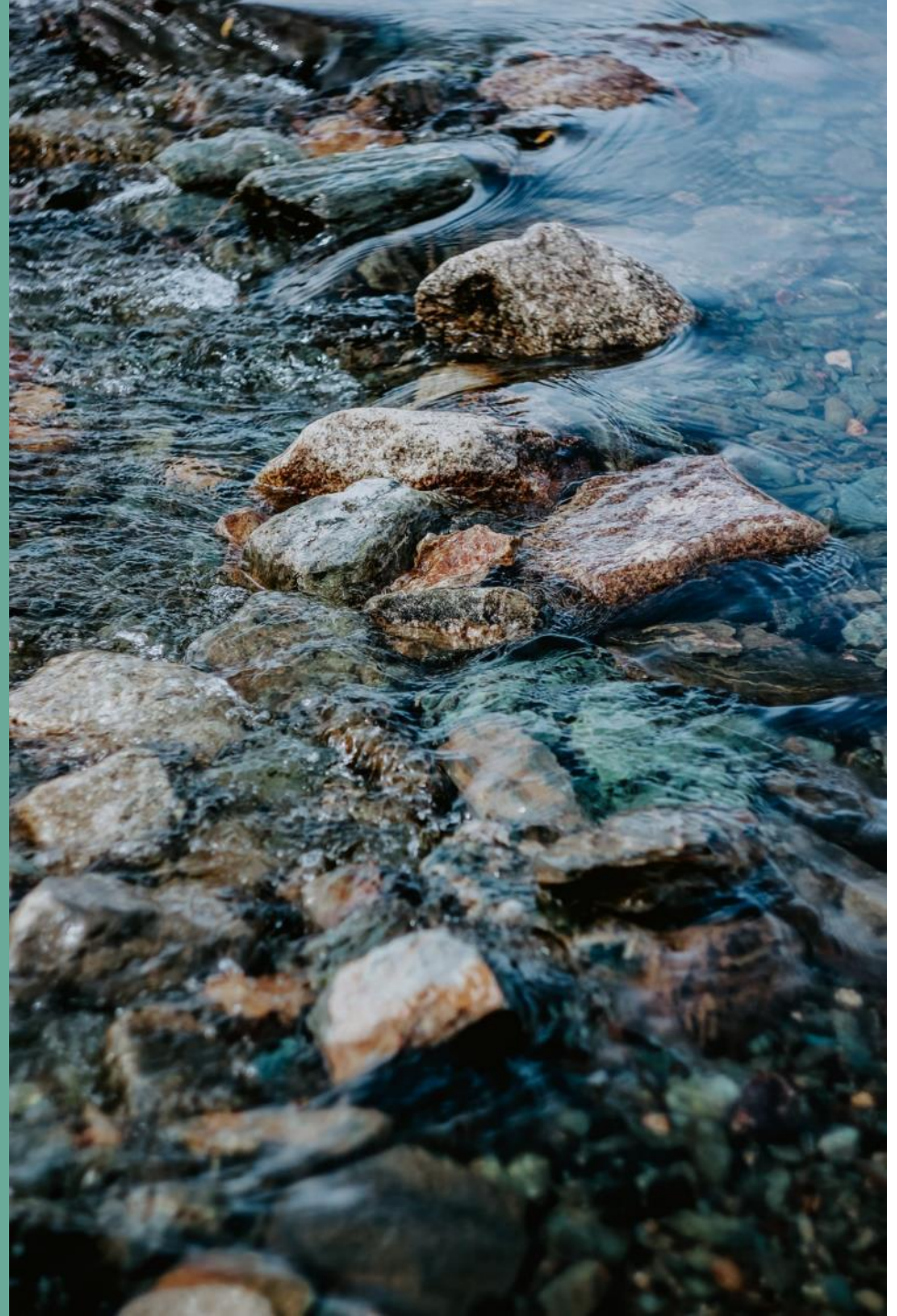
Why should customers pay for this when annual profits should be used for this?

The government abdicating responsibility to the water companies. The decaying infrastructure was built by the nation and improvements should be heavily subsidised by the government. While of course we all pay taxes, that would be fairer than the retrograde burden on water customers.

Privatisation was supposed to provide investment.

q21 How do you feel about these predicted bill increases that would come into effect from 2025? [Base 202]
q22: How do you feel about the estimated increase to your bill from 2025 to 2050? [Base 202]

The current economic climate for people is not the right time to be increasing bills. Costs need to be covered by the water companies out of profits instead of going to shareholders



Cost is a significant concern with many feeling they would struggle to pay for it

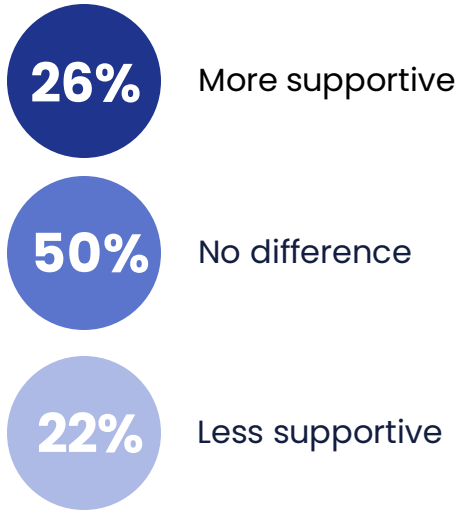
57% **think they would struggle to pay this increase**

51% **are specifically concerned about the plans because they would struggle to pay bills**

As well as cost…

- **18%** are concerned about the disruptions caused by improvements
- **16%** are concerned about the negative environmental impact of improving infrastructure

Does the news of these costs to you as a customer impact how you feel about the proposed targets?



Key insight

There's a reluctant acceptance to the proposed cost increases – many are still supportive of the targets as agree action is needed, but on a personal level, are unsure how/if they'll be able to pay. If rolled out, a clear support package would be needed for those struggling.

> *Being a pensioner with very limited income and yearly increases it would take nearly everything I get*
>
> *Can't pay the higher bills now and we both work, will not be able to sustain bill payments with the new increases*
>
> *I have zero idea I'm just now panicking about another bill I won't be able to afford despite being hardworking people*

q23: To what extent do you agree or disagree with the following statements? Remember, the £200 average per year cost increases would come into effect from 2025 until 2050. [Base 202]. q25: Assuming the proposed plans were to go ahead, do you have any concerns? [Base 202]

Opinions over timescales are conflicted – people want them sped up, but don't want to, or can't pay for it

%agreement…

64% Water quality should be improved as quickly as possible whatever the cost

40% I would prefer if the targets were set over a longer time period, so that the cost could be spread

34% The costs and timescales proposed seem fair

Given the choice, which option would you support?

Longer targets should be considered - it's better to have a longer time scale to allow more natural, sustainable solutions, and lessen the cost impact on customers	**49%**
Progress with the proposed targets for 2035 - as it's better to get this done sooner rather than later	**37%**
Don't know	**14%**

> *The longer targets would still achieve results at a cheaper cost. I was also surprised at the other problems that actually make the water dirty having a much bigger affect than storm overflows*
>
> *YW need to sort this problem out sooner rather than later. They cannot simply say that it's too expensive etc. Damage is being done continually and will only continue to get worse the longer that sewage entering the water system is accepted*

Key insight

The cost increase is a hard pill to swallow – particularly without any mention of how Yorkshire Water, or the Govt. would be contributing to costs and why it's become the taxpayer's responsibility.
Customers want the best of everything… sustainable solutions, lower costs, and speed.
Whatever the outcome of the consultation, customers will need to be reassured that costs are fairly calculated, that timelines are the best they can be, and that the solutions being implemented will be for the best in the long run.

q23: To what extent do you agree or disagree with the following statements? Remember, the £200 average per year cost increases would come into effect from 2025 until 2050. [Base 202}. q27: Given the choice, which option would you support? [Base 202]. q28: You chose "[pipe: q27]"Can you tell us a bit about why you would support this option?

A good aim but maybe the time scale is too long. I don't fully understand the processes involved to make the changes so it may not be feasible but I think 2050 is a long time away and a lot of damage could be done in the meantime

Appendix

Sample Profile (n=XXX)

GENDER

- Male: **43%**
- Female: **58%**

AGE

- 18-24 years: **0%**
- 25 - 34 years: **16%**
- 35 - 44 years: **14%**
- 45 - 54 years: **19%**
- 55 - 64 years: **23%**
- Over 65: **30%**

HOUSEHOLD SIZE

- 1 person household: **28%**
- 2 person household: **39%**
- 3 person household: **18%**
- 4 person household: **11%**
- 5 or more person household: **6%**

SEG

- ABC1: **68%**
- C2DE: **33%**

AREA OF YORKSHIRE

- South Yorkshire: **19%**
- West Yorkshire: **47%**
- East Riding of Yorkshire: **21%**
- North Yorkshire: **13%**

WATER METER

- Have water meter: **71%**
- Don't have a water meter: **29%**

VULNERABILTY

- Vulnerable customer: **39%**
- Non-vulnerable customer: **61%**

About your community

With over 2,000 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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