



# Impact of Covid Research Report

June 2022

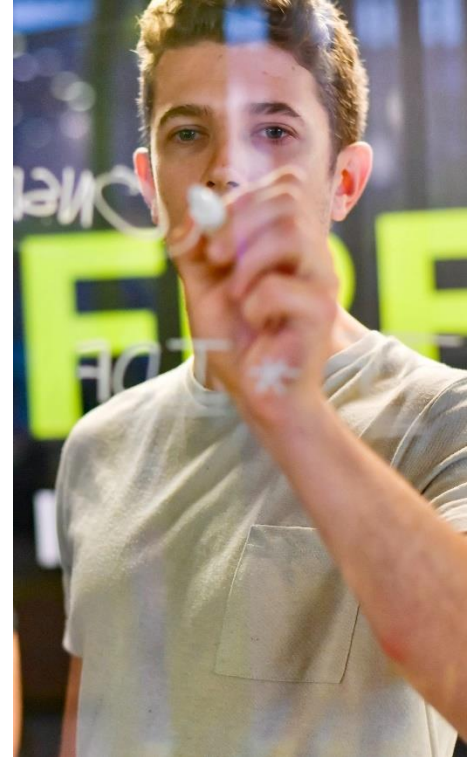
## Yorkshire Water

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# 1. Background

Aims & objectives



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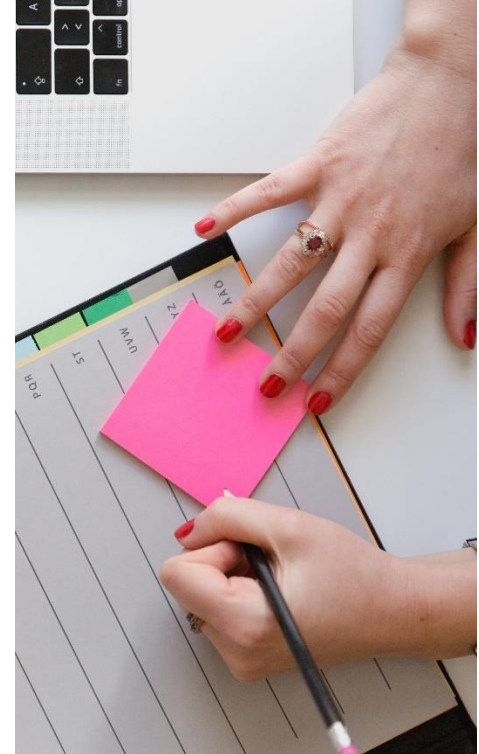
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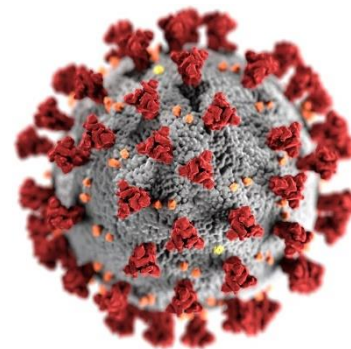
# Background

Yorkshire Water is in the early stages of gathering customer insight to inform the development of its 5 year business plan, PR24. The plan will lay out what the company will deliver for its customers between 2025 and 2030 as well as any long term strategic goals & investments until 2050.

To ensure the plan best meets the needs of customers Yorkshire Water needs to understand the impact that the Covid-19 Pandemic has had, so that it can help, where possible, to address any lasting change it may have caused.

In addition to the impact of Covid-19, Yorkshire Water also needs to understand how customers are feeling about their lives now & in the future. The emergence of the cost of living crisis, the war in Ukraine, climate emergency & a pending global recession are all factors in which the water company is interested to assess with regards to customer impact.

This report provides key insights from qualitative research conducted by Qa Research with household customers, non-household customers & external stakeholders during May 2022. It provides a synthesis of positive & negative experiences of the Pandemic, assesses how customers feel about life now, & delves in to the hopes, dreams & fears that they have about the future & the role they want Yorkshire Water to play.



## Overall study aim

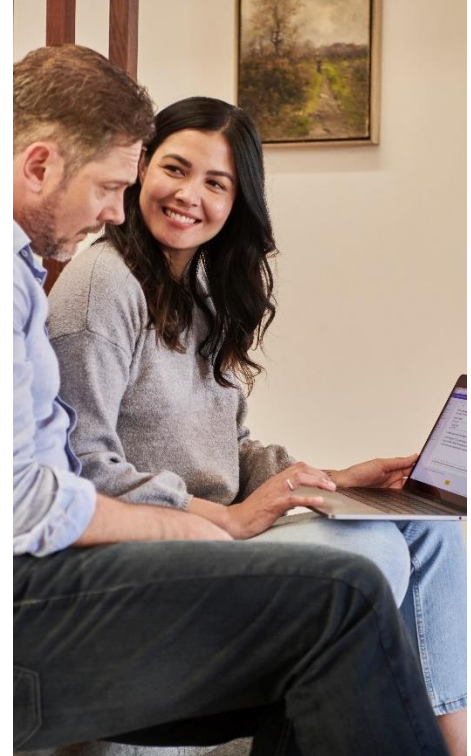
*'To understand the wider impact of Covid-19 on the people of Yorkshire and how this might have altered views, expectations from life and the companies they deal with, as well as their long-term outlook'*

# Key objectives

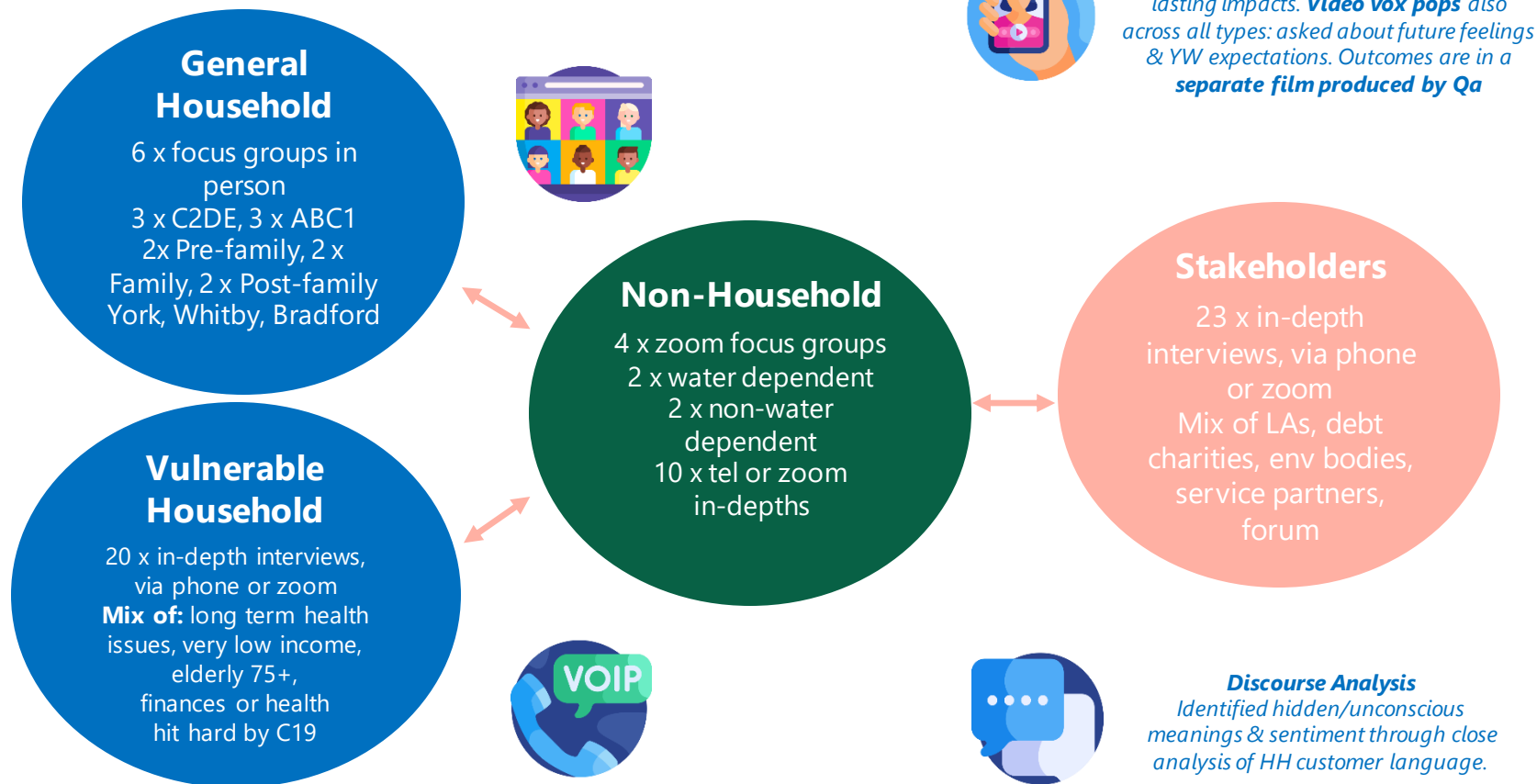
- **Gauge customers views on the impact of Covid-19**
  - Ongoing impacts, negative & positive, any changes in behaviour
  - Doing anything different than before March 2020, any changes likely to last in the medium & longer term
  - What readjustments are being made in the short term
  - How might the cost of living crisis impact any of the potential changes/adjustments
  - How did YW perform during the Pandemic
- **Explore changing outlooks on wider society, locality, community & the environment**
  - How has pandemic & cost of living crisis impacted customers thoughts / feelings on these areas
  - Have any of these areas become more or less important
  - Any change in key themes from the beginning of the pandemic e.g. community spirit, local focus, etc.
- **Understand feelings & any changes in attitude or behaviour regarding a range of life factors**
  - Finances, mental/physical health, resilience, home/community, family, social life, work life, environment, etc.
  - What has become more or less important, more positive or negative
- **Uncover customers' water usage, attitudes & behaviours during & post pandemic**
  - During the pandemic – did usage go up / down / the same & why? What factors / types of activity
  - How is water use now & likely usage going forward
  - What attitudes do people have towards reducing water usage, any behaviours adopted
- **Explore any expectations or hopes from what customers want Yorkshire Water to deliver in the future**

## 2. Methodology

How we gathered the data



# Methodology – wholly qualitative





# Recruitment Summary

The sample for this study was entirely recruited using a mixed method approach by our external freelance specialist recruiters, who are well known to Qa.

A mix of localised freelance recruiters were each provided with specific areas that were split according to each of the YW sub-regions and were given a target number of recruits to find in each. Customers were sought at random in these locations, based on the demographic quotas needed.

After agreeing to take part, our internal fieldwork management team sent each respondent a confirmation invite letter confirming the date, time and location of their depth/ group. This was mainly sent via email but sometimes posted for those without internet or email access. For anyone completing a ZOOM interview or group, this document also had their relevant ZOOM link on.

We undertook a confirmation call with each respondent at least 24 hours before any qual fieldwork to:

- Confirm the respondent understood the research
- Remind them of the date, time and format
- Check they can still attend
- Confirm key profiling details to ensure they were in line with what the recruiter provided /communicated

# 3. Key findings

## Household Customers

Outcomes from the general household customers as well as those in vulnerable circumstances



# Initial attitudes to Yorkshire Water were mostly positive

- As with many water projects most admitted to rarely thinking about their water supply & waste water service
- Mostly because they were happy with the service they received, the bill wasn't seen as high, water quality was good enough & nobody reported issues with interruptions
- Customer service was seen as responsive whenever any issues may have been reported
- YW was also proactive in informing customers if incidents in their area were to occur
- Some positive recognition of upkeep & visitor management of recreational sites owned by YW
- A small number reported frustrations when traffic was caused by road works due to fixing leakages – but this was rare

*"I'm still waiting for them to get back to me...about a discount thing...which would be a big help, as a single parent"*  
Bradford, GHH, Fam, C2DE

*"They've really done a lot of work developing walks around reservoirs, and they're generally well signposted."*  
York, GHH, Post-fam, ABC1

*"When I got behind on my bills, I phoned them and they were there for me"*  
Sheffield, VHH, Fam

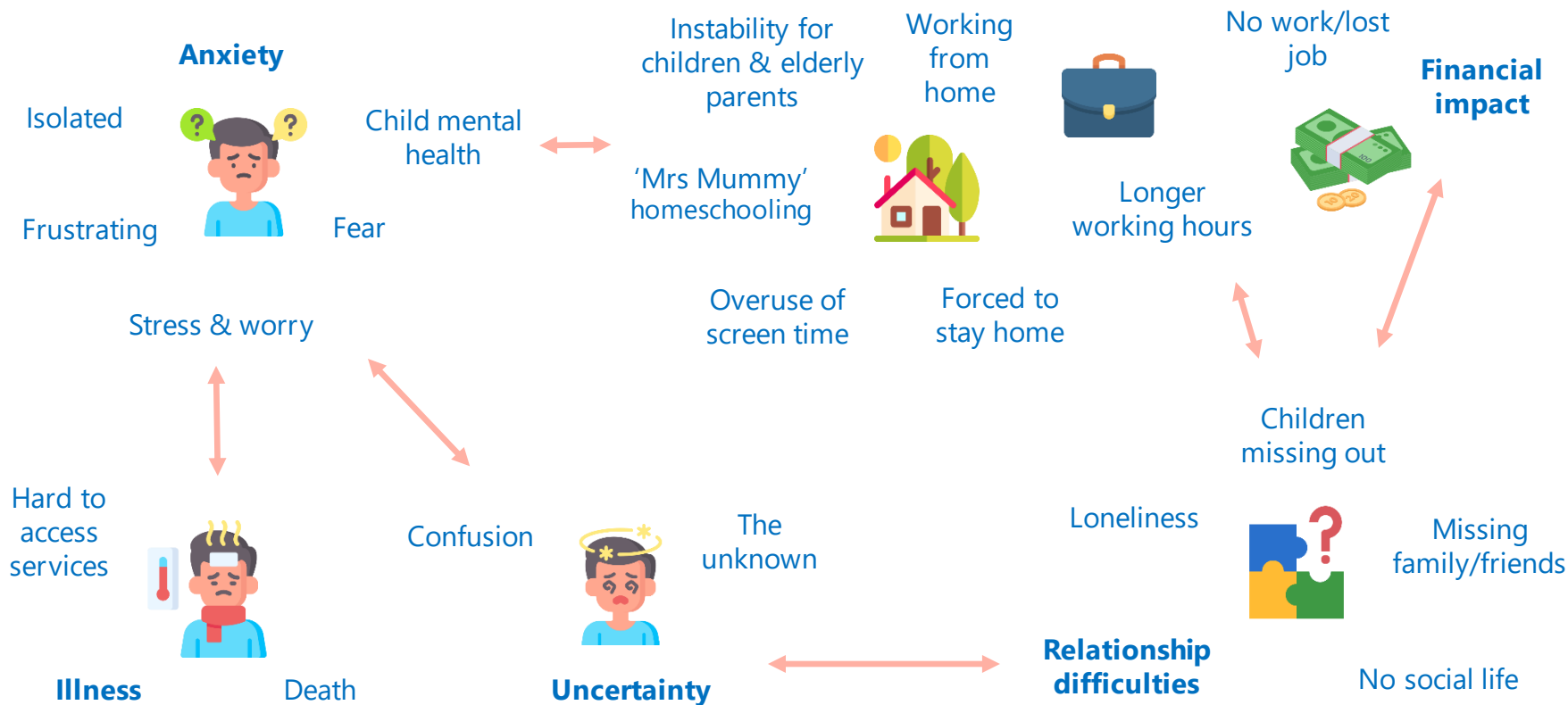


# Covid-19

## OVERVIEW:

- Most general household customers (GHH) felt they had moved on from Covid i.e. 'old news'
- Memories are still vivid with stories of both negative & positive experiences
- Many felt fear, isolation, frustration, limitations & uncertainty. Although hope for continued return to freedoms, reconnection with each other & to enjoy life as it once was remained strong
- Vulnerable customers were impacted in similar ways, just more intensive due to their circumstances: i.e. physically vulnerable had to shield, leaving lasting impacts on their mental health & a reluctance to return to 'normal' society
- Some struggled financially due to lost jobs, long-term sickness or caring responsibilities & remain an ongoing issue for many
- YW generally seen in a positive light. Few had reason to complain. Any issues cited a responsive service in the main & no major differences before or during the pandemic

# NEGATIVE aspects focused on restrictions & stay at home factor



## Negative Covid experiences comments



*"Lots of businesses went under...some of those that owned a fishing boat"*  
Whitby, GHH, Fam, ABC1

*"I'm self employed, a barber, I was told to shut. I couldn't earn any money, but all my bills were still going out"*  
Bradford, GHH, Fam, C2DE

*"A general sense of uncertainty about everything whether things were good or not"*  
York, GHH, Pre-fam, C2DE

*"Constant disappointment...things just kept getting cancelled all the time...like last Christmas...I saw my parents for an hour on the doorstep."*  
York, GHH, Pre-fam, ABC1



*"My Auntie died, they said it was Covid but she didn't have Covid."*  
Whitby, GHH, Fam, ABC1

*"I've got an autistic child, and for him not to do his normal things...like talk to one of his friends, how do you explain that to a child."*  
Bradford, GHH, Fam, C2DE

*"(WFH) I didn't enjoy it at all. There was very little support for teachers. You're phone would ping in the middle of the night...I hardly slept."*  
York, GHH, Post-fam, ABC1

*"It was so hard not being able to just hug somebody."*  
Whitby, GHH, Fam, ABC1

*"I was furloughed from work, I didn't know when it was gonna end."*  
Bradford, GHH, Fam, C2DE

*"Homeschooling. Battling for seven hours a day...I became Mrs Mummy."*  
Bradford, GHH, Fam, C2DE

*"I never want to homeschool again for the rest of my life."*  
Whitby, GHH, Fam, ABC1

*"I found the whole concept of working from home really hard, I like interacting with other people...I felt guilty I wasn't doing enough"*  
York, GHH, Post-fam, ABC1

*"It was groundhog day, every day of the week"*  
Whitby, VHH, Fam, ABC1

*"We lost my daughter to screen time for hours on end."*  
Bradford, GHH, Fam, C2DE



# Negative Covid experiences comments (vulnerable customers)



*"For me & my son, it was about a holiday & normality & giving him a chance to recharge after a really hard year at school. And we couldn't." Sheffield, fam, VHH*

*"Since contracting COVID, my levels of energy have been zero. I have been diagnosed with fibromyalgia." Sheffield, Fam, VHH*

*"It was quite a lonely life, but on the whole, I managed" York, Post-fam, VHH*

*"I think a lot of people suffered with their mental health because of being stuck at home and not being able to work." Whitby, Fam, VHH*

*"Even though I was reassuring everyone else that it would be alright, I wasn't sure myself." Sheffield, Fam, VHH*



*"My health... It was a full 12 months before the hospital saw me. I was really ill and have had health issues since I was a child." Whitby, Pre-fam, VHH.*

*"It was very worrying. You don't know whether you're going to lose your house or your job. My husband's job kept saying 'we're going to have to make redundancies' & you've got that on your head the whole time." Bradford, Fam, VHH.*

*"Because I work as a support worker, when the first COVID did hit, I didn't come & see my mum. I just passed her stuff through the door & it was heart-breaking" Leeds, Fam, VHH*

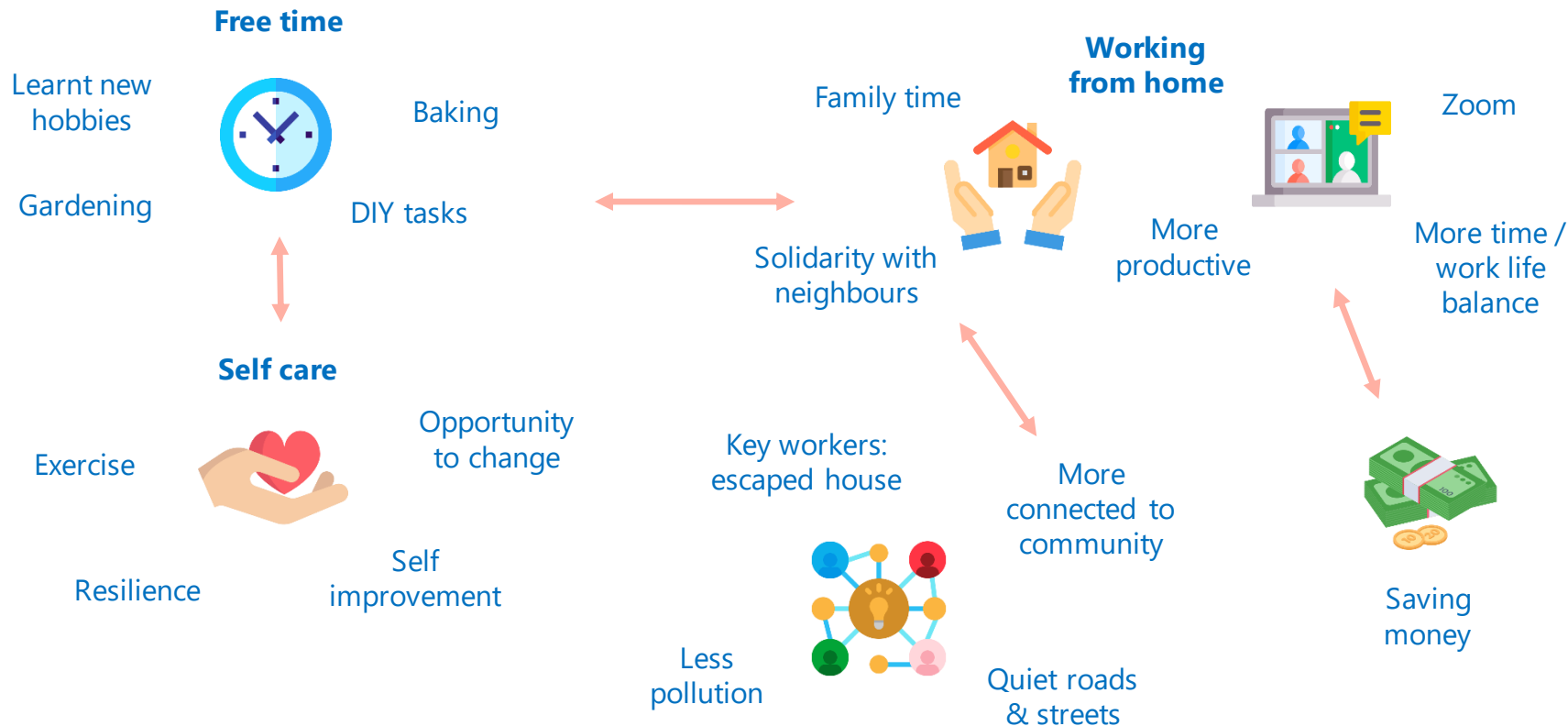
*"After COVID it's been a real struggle health wise. If I get a bad cold and it hits my chest, I struggle breathing." Sheffield, Fam, VHH*

*"It registers something in your brain of a really dark place." Sheffield, Fam, VHH*

*"I had money worries, especially when my wages went down. My mama used to give me loads of food." Whitby, Fam, VHH*



# POSITIVE factors included relationships, community & self improvement





# Positive Covid experiences comments



*"It was nice having more time  
with family & friends"*

*Whitby, GHH, Fam, ABC1*

*"I completely re-did my garden,  
which made me feel quite good."*

*Bradford, GHH, Fam, C2DE*

*"Communities got a bit stronger"*

*Whitby, GHH, Fam, ABC1*

*"A little old lady would come & talk to  
us in the street, & you wouldn't do  
that normally would you?"*

*Whitby, GHH, Fam, ABC1*

*"I did more exercise  
because I had the time"*

*York, GHH, Pre-fam, C2DE*



*"Going into the office two days a  
week has been so inspiring...seeing  
colleagues...but my (WFH) days, I  
get so much more done."*

*York, GHH, Pre-fam, C2DE*

*"Just appreciating your family and friends more."*

*Bradford, GHH, Fam, C2DE*

*"I was lucky I could carry on working."*

*Bradford, GHH, Fam, C2DE*

*"Working from home, you have so much more  
time, you're not travelling there & back."*

*York, GHH, Pre-fam, C2DE*

*"FaceTime was really good...to be able to  
speak to my Mum so my kids could speak to  
her too...she's (Mum) an expert now, she even  
uses WhatsApp now, changed her life."*

*Bradford, GHH, Fam, C2DE*

*"I did lots of online courses."*

*York, GHH, Pre-fam, C2DE*



## Positive Covid experiences comments (vulnerable customers)



*"I would speak to my brother  
more who lived in Japan"  
Whitby, VHH, Post-fam*

*"Authorities like the local council,  
started giving out food vouchers.  
That helped out massively."  
Sheffield, Fam, VHH*



*"My daughter would come round  
twice a week with my shopping"  
York, VHH, Post-fam*

*"Just having time to myself was  
fantastic. And that was about it."  
Whitby, VHH, Fam, C2DE*



# Overarching lasting changes due to Covid-19 pandemic

## NEGATIVES

- More day to day here & now mindset, harder to plan / think long term
- If elderly or with health issues, potentially still fearful of crowds, social events – so becoming even more insular, isolated
- Small number hold a lingering apprehension to travel out of locality
- Most are more careful about spending habits
- Poorer household threshold on the increase
- Many are more wary of information sources
- Concern over pace of digitisation & potential alienation of certain segments in society



# Overarching lasting changes due to Covid-19 pandemic

## POSITIVES

On balance, for lasting changes positives outweigh negatives as restrictions gone & choice & freedom has returned

- Working from home to hybrid = work life balance, sense of freedom through choice
- New skills & hobbies & sense of empowerment
- Make more of an effort to connect with relatives
- Closer to immediate family
- More embedded in local community
- Appreciative of things took for granted i.e. out for meal, pub, a walk, etc.
- More resilient mindset – got through Pandemic, we can get through other challenges
- Accept need to be agile & adaptable due to ongoing changes in society – will help to mitigate challenges of COLC
- Greater awareness of how the world could look, feel, smell & sound if eco measures / actions implemented sooner
- Discovery of new places to visit & enjoy in UK, regionally & locally
- Appreciation of how technology can make life better



# Lasting changes from Covid by lifestage

## Young people

- Revealed fewer lasting issues than family & older customers
- Felt pandemic caused price increases for certain products i.e. buying a car
- Ongoing worry about ability to get on housing ladder
- Sense of optimism about career opportunities, especially from learning new skills during lockdowns
- More aware of perceived over use of social media & try to limit

## Parents

- Worry about lasting impact on children's development, education, mental health
- Financial impact if lost income
- Worry about impact on elderly parents who are still isolated & reluctant to leave home
- Increased bond with children & family/relatives
- Some reduced hours or still WFH to keep increased family time
- Others re-evaluating work / career change
- Reduction in childcare costs if still WFH or hybrid

## Older folk

- Still fearful of crowds & busy public places (but have generally accepted this)
- Most still wear a mask
- Less socially confident
- Less impetus to visit other places
- Live for today, less likely to look long term
- Rue the lost time with young grandchildren
- Frustrated by perceived shift in digitized services & limited choice to engage i.e. chat bot replacing in person phone
- Although some are empowered by new found 'zoomability'
- Others are enjoying early retirement thanks to Covid

# Lasting changes from Covid by SEG

## VHH – poverty, health issues, elderly

- Where Covid has triggered poor or worsening health conditions: often a key driver of life decisions as causes so many limitations
- If in poverty, likely in more debt than pre or during Covid
- V elderly likely to be more isolated than ever before due to fear of going out & less visible to organisations/service providers due to hastened digitisation

## ABC1 – more affluent

- See COLC as partly due to Covid
- But concerns are more for others than themselves as more able to handle price increases
- Although, are still more wary of own spending habits so will cut back on 'nice to haves'
- Some perceive 'middle class' households will soon slip in to poverty threshold
- More likely to think long term & think of how world will be for future generations

## C2DE – low income

- Much more conscious of COLC on everyday living
- Day to day existence, much harder to think long term
- More fearful due to COLC: where is this all going to lead?
- Cutting back on 'nice to haves' becoming the norm
- More likely to say 'YW pls don't double my bill'



# Vulnerable customer case study: health worries

## Veronica, aged 38, VHH, LTHC

Veronica has suffered from asthma for 10 years.

Veronica felt disconnected from family & friends due to restricted social contact.

Among all the other stresses, Veronica struggled to support her autistic son who was affected by the loss of routine & regular activity.

She remains anxious about contracting the virus because of her own physical health condition & the fear of passing the virus onto elderly parents who were also vulnerable.

*"But because I've not had COVID, I think I've become more obsessed with not touching it. And I still wear a mask, and it moved on. I still wear a mask. If I'm on a bus. When I'm outside in the shopping centres. Now when I'm outside in the street, then I can take my mask off. If anybody comes near me. I'm just flipping it straight back up"*



# Vulnerable customer case study: health worries

## Sandra, aged 47, VHH, LTHC

Sandra has suffered with underlying health conditions since early adulthood.

She was reluctant to leave the house during the pandemic out of fear of contracting the virus, & was distressed by husband mixing with others at work.

Sandra suffered **life changing** health implications when contracting COVID-19. Her underlying health conditions complexified her experience of contracting the virus, leaving her permanently disabled.

*"Had COVID very early on and it has had a massive impact on my health. Massive, to the point now where I had a blue badge and I've never had one before. It's made a massive difference to me"*





# Vulnerable customer case study: financial concerns

## Tamsin, 41, VHH

Tamsin, a single mother, was working under a casual employment contract when the pandemic hit unexpectedly.

Without any notice, she was informed that the supply of work had stopped.

Being employed on a casual contract meant that Tamsin was not eligible for furlough pay.

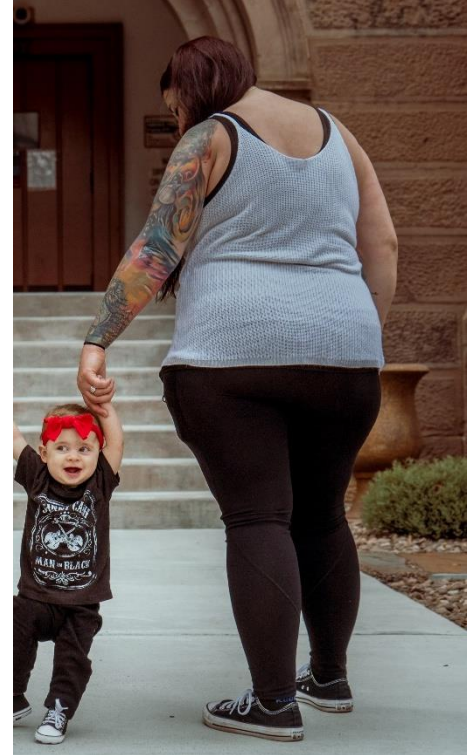
She relied on savings, elderly parents & universal credit for financial assistance. Even this was not enough to stop her from getting behind with monthly bill payments, incurring small amounts of debt.

Tamsin & her children began living "day-to-day, week-to-week, month-month", sacrificing luxuries & only spending money on basic necessities.

Tamsin's mental health took a turn for the worse trying to juggle financial pressures, loss of routine, home-schooling, & shopping for elderly parents.

*"I struggled losing my job and my freedom. It suddenly felt like everything had been taken away from me."*

*"I think of the pressures, straight away, financial stress, home-schooling. Having to deal with it all very quickly."*



# Vulnerable customer case study: Older age isolation

## Cyril, 81

Widowed a few years before the pandemic hit, Cyril spent a large proportion of the lockdowns isolated from his family & community, in his living room.

He was frustrated by the loss of valuable time at the end of his life, which could have been spent watching grandchildren growing up.

With declining health & mobility, the threat of the virus still looms around him on a daily basis.

While the rest of the world has opened back up, mask wearing, avoiding crowded public spaces, & limiting contact with others has continued to be at the forefront of Cyril's mind.

*"It were just a lonely life for a while. But  
on the whole, I managed."*



# Lasting negatives key comments



*"Life is short and you never know what's around the corner."*

*Sheffield, Fam, VHH*

*"You have to take each day as it comes."*

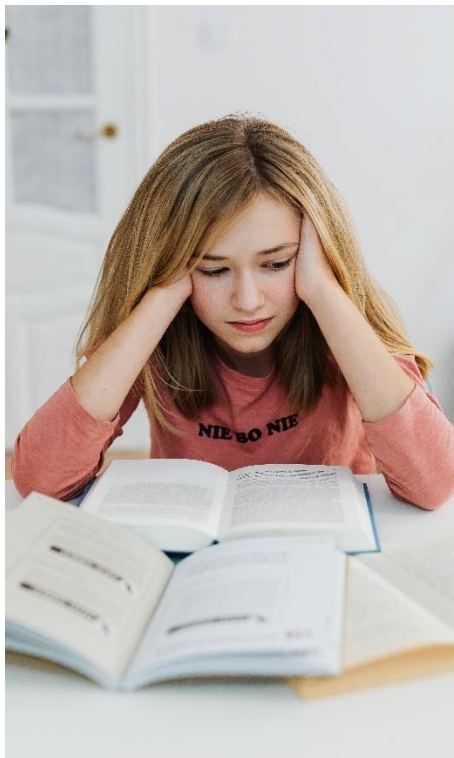
*Bradford, GHH, Fam, C2DE*

*"My daughter was born just after it happens...and now she has struggled to form relationships with people."*

*Whitby, GHH, Fam, ABC1*

*"I think as a nation we have got more resilient...stiff (upper lip)...get on with it, just crack on."*

*Whitby, Fam, VHH*



*"It will continue to affect my social life. I was thinking to myself I don't seem to have many friends at the moment. I used to have friends when we went socialising with them"*

*Whitby, VHH, Post-fam*

*"You can have hopes and dreams, but you just have to be more wary of the future...because of Covid really"*

*Bradford, GHH, Fam, C2DE*

*"They (kids) get poorly really easily because their immune system's not (developed)."*

*Whitby, GHH, Fam, ABC1*

*"My body can't do as much as it used to. (as did so little during Covid)"*

*Whitby, GHH, Fam, ABC1*



## Lasting positives key comments



*"I was a welder, now I'm a builder....I (now) get to go all over the country."*

*Bradford, GHH, Pre-family, ABC1*

*"You actually realise what things matter in your life, you know, what made you realise how important your family actually are, you know, like, before the pandemic, you kind of take them all for granted."*

*Bradford, VHH, Fam*

*"You appreciate your family more...I see my Mum & Dad every day and I didn't (before Covid)"*

*Bradford, GHH, Fam, C2DE*



*"Myself and my wife both lost a significant amount of weight because we were exercising more."*

*Whitby, VHH, Fam*

*"We're all doing the things we wanted to do now. There's no excuse not to do your social life now."*

*Whitby, Fam, VHH*

*"We've learned from feeling low & losing quite a bit as a family. It's set us up for the future. If anything bad was to happen, as long as we've got each other we'll be alright."*

*Sheffield, Fam, VHH*





## OVERVIEW

- One of the biggest tensions that comes through respondents' language is the **role of 'personal routine'**
- **At an individual level having a consistent personal routine is key to a sense of normality** – regardless of what else is going on in the wider world (recessions, war, political turbulence, etc.)
  - It also generates a sense of certainty – each day will be pretty similar to the next
  - And importantly this is somewhat controlled by the individual – the routine isn't inflexible & can accommodate changes
- What we see in people's language around the pandemic is that those that had **positive experiences** were better able to **establish new routines** & those that had more **negative experiences** felt that their routines had been **irreparably disrupted**
- The Pandemic posed a serious challenge to people's feeling of **personal control** because unlike most major global events, it radically altered the lives of the majority of people



## NEGATIVES

- Although Covid is talked about in the past tense – there is an underlying memory of things (experiences, opportunities, income) that were **permanently lost & cannot be regained**
- And people are **sensitive to the perceived current & future effects of these losses** (e.g. impact on children, impact on elderly family members, missed family occasions, etc.)
- These perceptions are a little **like ‘scars’** – the injury of the pandemic has healed but the marks remain & because of this it’s not always possible to move on entirely
- Because the pandemic was such a huge event in people’s experiences & memories it’s easy for people with negative experiences to see it as **having consequences beyond the event itself**
- And because people tend to blame external factors vs themselves when it comes to negative experiences this can be a source of **resentment**



## POSITIVES

- By contrast those who had more positive experiences of the pandemic tend to **see it in terms of gains** – the things it added to their lives & the things they could do more of
  - This is an example of how people tend to **see the world through the lens of simple binary oppositions**, e.g. **negative experiences = loss vs positive experiences = gains**
- This is most often talked about in terms of having **excess or 'more' time**
- From a human perspective **time is perceived as one of the most scarce resources** – a constraint that we cannot escape – so to receive more time (at no extra cost) was hugely significant
- We see lots of **positive stories** about people spending more time with families, to learn new skills, take up new hobbies, exercise, etc. – experiences that usually have a direct cost associated with them (taking holiday, putting off chores, etc.)
- Post-pandemic these positive experiences are less directly associated with the pandemic itself, as, in reverse to negative experiences, we tend to **attribute positive outcomes to our own** individual agency
  - And the evidence of this is 'proven' through new skills, behaviours & competencies



# Water use

## OVERVIEW:

- GHH customers & VHH customers generally showed the same patterns in water use over the Covid-19 pandemic
- Customers mostly noticed a spike in their water usage in the Covid lockdowns due to increased time at home
- Some admitted they used more water as it was 'something to do' as they had too much time on their hands – particularly if on furlough or out if work due to Covid
- Customers felt their current & future water use is less than during the pandemic as time spent at home is far less than it was
- The vast majority of GHH & VHH customers revealed very limited water saving behaviours



# Water use generally increased at home during the pandemic



**More showers & baths:** more time, home exercise & good Covid hygiene; although, some didn't see the point in showering daily during lockdown



**More laundry:** clothes washing was more frequent: more time to keep on top of regular loads, children using more clothes, bedding changed more regularly. But some stayed in the same clothes for longer, so washing loads decreased



**More hand washing:** & greater care for personal hygiene in order to try & keep safe from the virus



**More house cleaning:** more frequent & more care taken as advised by government



**More tea:** as well as dishwashing & toilet use due to the increase in home working. Although most key workers found very little difference in water usage



**More gardening:** lots of people claimed to have worked on their gardens during lockdown, requiring extra watering, & combination of heatwaves & lockdowns meant paddling pools, water toys & existing or newly purchased hot tubs all used far more frequently

# Future water use likely to be less compared to the pandemic

- Personal usage likely to reduce as less time is spent at home since lockdowns, restrictions on travel have eased, returning to offices, kids back at school & increases in energy costs
- A small number of customers were minded not to waste water, mostly due to cost saving reasons as they have meters, whilst some others felt it just wasn't right to waste water on moral grounds
- Very few showed any real concern regarding a need to reduce usage based on any perceived lack of supply in the region. Issues with water supply shortages were thought to be in other areas of the UK rather than in Yorkshire
- Some on lower incomes admitted their focus on reducing the cost of household bills tended to be more around energy use. This was because it was more expensive & they were frequently reminded of how much they spent & more aware of how to reduce usage i.e. smart meters read outs, easy to turn the lights off. etc. In comparison, water saving behaviours were rarely front of mind, even for those on meters
- It was suggested that water saving behaviours may be more likely adopted if customers were more frequently reminded of what they were using & how much they were spending, such as the use of an app or regular usage & bill updates

# Water use key comments



*"We bought a hot tub  
York, GHH, Family, ABC1*

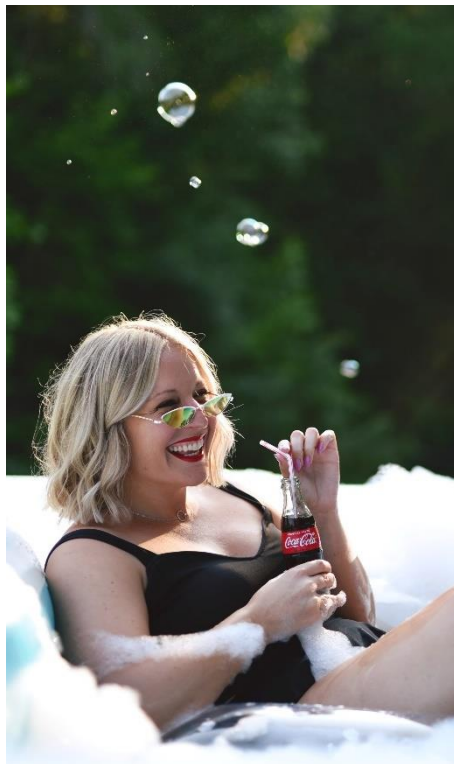
*"The best thing was the hot  
tub...three or four times a day  
Whitby, GHH, Fam, ABC1*

*"Definitely more (usage during)...the sales  
of paddling pools must have been (huge)  
Bradford, GHH, Fam, C2DE*

*"Definitely a lot  
more just because  
we were at home"  
York, GHH, Pre-  
fam, C2DE*

*"I was washing  
clothes more than  
anything, just for  
something to do."  
York, GHH, Pre-  
fam, C2DE*

*"You think more about the energy  
you use but not your water."  
Bradford, GHH, Fam, C2DE*



*"The kids were in  
the paddling pool."  
Whitby, GHH, Fam,  
ABC1*

*"I were making  
constant cups of tea"  
Bradford, GHH, Pre-  
family, ABC1*

*"Working from home...it's ridiculous how  
much tea I'm was drinking."  
Bradford, GHH, Fam, C2DE*

*"I used the bath more as there  
was nothing else to do  
Whitby, GHH, Fam, ABC1*

*"With energy you get a constant reminder about  
what you're using, with water you don't get that."  
Bradford, GHH, Fam, C2DE*

*"If there was an app (for water) my  
wife would (check it)."  
Bradford, GHH, Fam, C2DE*



# Language Analysis: water use



- Home (and business) water supplies **play a crucial, but largely implicit, role in people's day-to-day routines**
- Unlike other utilities water is perceived to be **less like a commodity/product** & more like **a natural resource (a public good)** – respondents used very different language to talk about electricity & gas for example, deals, promotions, brands, etc.
- Their language around water is much less precise & their experiences with YW are infrequent & simple – **at a conscious level water is much lower on people's radars vs other utilities**
  - Although water meters have heightened awareness of usage
- People are **much less aware** of the process water goes through to be usable in homes & businesses & what happens to it after it is disposed of – by contrast people have been made much more aware of the complexities of gas supplies due to the shortages

# Language Analysis: water use during the pandemic



- This attitude & perception of water meant that during covid water played an unconscious **comforting & reassuring role** as it was a crucial part of people's new routines & habits
- As the quotes on the previous slide illustrate, water played much more than a **functional role** in people's lives during Covid
- Different uses of water **enabled people to use water to create emotional stability & certainty** – people used cups of tea to create moments of comfort & familiarity, hot tubs were places to relax & socialise, handwashing was a way to create protection
- And this was because water was not seen as a utility that people had to use as cautiously in the same ways they might do with gas/electricity because they did not expect any nasty shocks – **water is always there & almost always works as it should do**

# Language Analysis: water use now & future



- **Water provides a reassuring role during times of need** – its price stability vs gas during the COLC is another example of this
- The problem with this perception is that this **makes it extremely difficult for people to perceive water as a scarce resource or as a utility that could be disrupted** (especially in a part of Britain with perceived high rainfall)
- While people expect to use less water, this is a consequence of spending more time out of home vs concerns about the impact of climate change on resources
- Water remains a **backbone of people's daily routines** & as people explained that unless they are overtly re-educated to perceive their water supply differently their current behaviour would be unlikely to change



# World issues

## OVERVIEW:

- The 'cost of living crisis' had the most impact on negative views towards the future, as it influenced every day decisions
- The subsequent 'pending global recession' isn't here yet, so wasn't a major concern at the moment
- The 'war in Ukraine' is causing negative feelings about the future, due to frequent news coverage, impact on supply chains & an underlying fear of nuclear war
- Government performance is a great frustration & anger for some: mistrust towards authority & reliable info sources
- A mixed response for climate change: many felt it was an urgent crisis & a worry, while others felt it was enough to 'do their bit' or that the impact was overstated
- Supply shortages were felt to be often short lived & society had become resilient. Although some with health issues feared medicine shortages
- Covid was often cited as the least worrisome issue: 'old news' & something we had learnt to live with

## World Issues (main short term issue) **'COST OF LIVING CRISIS'**

- Main issue for majority: particularly more acute for C2DE & VHH customers
- Post-family customers worry about a bleak future for their grandchildren
- Forcing most people to think very short term, acting in urgent mode rather than plan for the long-term
- Knock-on-affect is less focus on issues like climate change as ensuring food on table is more important
- Most can't see an end to it & don't expect costs to go down
- Although there is a sense of resilience – Covid has toughened customers up, 'we'll adapt & survive' attitude
- For VHH customers, older age groups were less likely than pre-family & post-families to be concerned about the financial implications, indicating more financial security





# Cost of living affecting all customers, especially VHH, C2DEs & YP



*"I haven't seen my mum in over 6 months because I can't afford to put the petrol in my car... it's either pay my bills or visit family"*  
Whitby, Post-fam, VHH

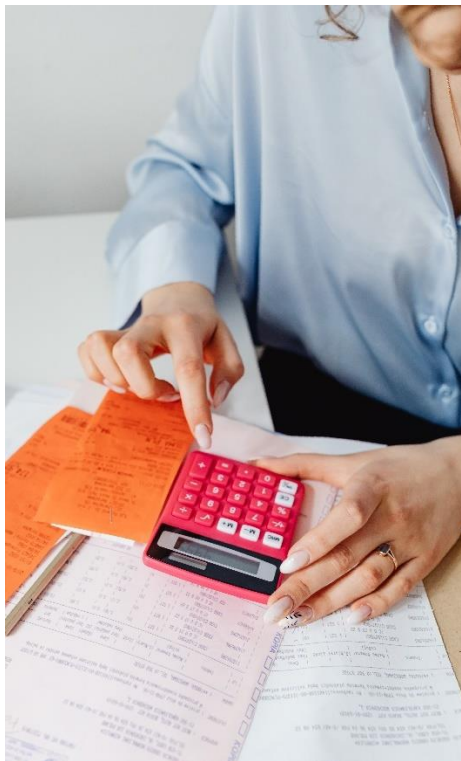
*"We're in for a very cold winter"*  
Sheffield, Fam, VHH

*"I can manage, it's alright for me"*  
Bradford, GHH, Pre-fam, ABC1

*"I worry all the time for my children"*  
Whitby, GHH, Fam, ABC1

*"Every week the cost has gone up from the week before. Even if its just 5, 10 pence, it's still adding to your bill at the end"*  
Whitby, Post-fam, VHH

*"Much more skint...there's no chance of saving any more money now"*  
Whitby, GHH, Fam, ABC1



*"(Our children) will be paying it off for the rest of their lives"*  
Whitby, GHH, Fam, ABC1

*"It concerns me about the cost of living for my children. I worry about them getting a mortgage...with the situation me & my husband are in, we are not able to help them financially"* Bradford, Fam, VHH

*"Our weekly shop's doubled (in price) for some reason. It's the same stuff, like how has that happened?"*  
Whitby, Fam, VHH

*"You think everything going up is paying for Covid"*  
Whitby, GHH, Fam, ABC1

*"I don't see that as a problem really, for us. Because financially, we're reasonably settled."*  
Whitby, Post-fam, VHH



## World issues (having the biggest short term impact) 'PENDING RECESSION'

- Seen as directly related to COLC
- And many expect the worst is still to come
- ABC1s are more likely to worry for others less fortunate or for generations to come
- C2DEs already cutting back on any 'nice to have' spending which is set to accelerate
- Although recession is not here yet & some are stoic about getting through
- Threat to YW will grow when more decide who to pay if in arrears

*"It's not gonna ruin the future it's just gonna slow it."*  
York, GHH, Pre-fam, C2DE

*"We've got out of previous ones."*  
York, GHH, Pre-fam, C2DE

*"I got a mortgage at nineteen, my kids'll never do that"*  
Bradford, GHH, Fam, C2DE

*"We're already helping so many other people (overseas) and not enough the people here.."*  
Bradford, GHH, Fam, C2DE



## World issues (having the biggest medium term impact) 'GOVT. PERFORMANCE'

- Low trust & diminishing faith in competence
- Frustration over handling of pandemic, 'partygate', cost of living
- Some were resigned to this & tried not to allow it to impact views on future, but a sense of ongoing disappointment was clear
- What's the next scandal going to be? When will a competent set of politicians emerge?
- Very few had any confidence Govt would help alleviate COLC
- But a general acceptance that dealing with issues was up to individuals to cope with

*"This one infuriates me."  
Whitby, GHH, Fam, ABC1*

*"No point in worrying about something you can't do absolutely nothing about"  
Whitby, GHH, Post-fam, C2DE*

*"The government think it's ok for them to have a party while people are dying in nursing homes."  
Bradford, Fam, VHH*

*"Boris Johnson, he doesn't really do much does he?"  
Bradford, GHH, Pre-fam, ABC1*

*"How can someone who runs the country break the law and...get away with it?"  
York, GHH, Pre-fam, C2DE*



## World issues (having the biggest short to medium term impact) 'UKRAINE WAR'

- Ongoing worry about where it could lead
- Will Putin press the nuke button?
- A sense of helplessness as have no control or influence over outcome
- Perceived knock-on impact on COL, food / energy supplies, etc.
- Just adds to any pessimistic feelings about the future

*"Will he press the button?."*  
Bradford, Fam, C2DE

*"It's terrible but it's not  
impacting my life"*  
Bradford, Fam, VHH

*"We can't control  
it but we feel  
guilty about it."*  
Whitby, GHH,  
Fam, ABC1

*"They keep trying to drag it  
over here don't they."*  
Whitby, GHH, Fam, ABC1

*"They (schools) are filling kids  
heads with so many things they  
don't need to, like the war."*  
Bradford, GHH, Fam, C2DE

*"They'll blame the war...it was Covid, now  
it's the war. You think what's it gonna be  
next that they're gonna blame?"*  
Bradford, Fam, C2DE



# World issues (key issue in long term) 'CLIMATE CHANGE'

- The main long-term worry but it doesn't govern day to day thoughts & feelings
- Although a lingering fear exists about a possible bleak future for generations to come
- Targets on net zero & growth of EVs gave some a sense that CC is or will be tackled
- But many felt progress too slow, lots of talk about targets from policy makers but little visible action
- COLC, war in Ukraine take up so much immediate focus that CC 'can be kicked down the road'
- Some felt a sense of helplessness as most impact will be from Govt policy decisions
- Some worried about possible future wars due to indecision & lack of action





# Mixed views on climate change

*"It's changed for the better for my liking. I mean, I hated winter but it's not as bad as it used to be"*

*Whitby, GHH, Post-family*

*"Electric cars...nobody can afford them...or charge them"*

*Whitby, GHH, Fam, ABC1*

*"It is a worry but it shouldn't be the major worry."*

*Whitby, GHH, Fam, ABC1*

*"I know it's a bad thing. I've tried to cut down plastic use but that's about it."*

*Bradford, Fam, VHH*

*"It is affecting us now, just because we might not see it."*

*Bradford, GHH, Fam, C2DE*



*"During Covid because nobody was going anywhere the skies were clear."*

*Whitby, GHH, Fam, ABC1*

*"It worries me a lot more now than it used to...it's in the media a lot more."*

*Whitby, GHH, Fam, ABC1*

*"It is easy to neglect it because it's not right in front of you all the time."*

*Whitby, GHH, Fam, ABC1*

*"If it was televised all the time like Covid was, you'd think about it all the time."*

*Whitby, GHH, Fam, ABC1*

*"It's not something I think about every day, but I think it's a massive problem...based on what they're predicting, over the next 50 or 60 years, it doesn't seem like we're moving quickly enough"*

*Bradford, GHH, Pre-family, ABC1*

*"It could actually lead to more war & conflict"*

*York, GHH, Pre-fam, C2DE*

*"My kids go to scouts, and it's their big focus...it's drilled into them."*

*Bradford, GHH, Fam, C2DE*

# World issues (having less impact in general) 'Supply shortage'

- Overall, the least of peoples worries
- Most customers had noticed some supply shortages i.e. cooking oil, petrol, etc.
- It has become a transient normality. People generally accept that things might not be available at times & seem accepting
- Supply shortages often seem short lived - a big media story that disappears quickly as supplies return
- VHH with health issues cite greater concern if medications ever become unavailable, as they are so much dependent on them



# World issues (having less impact in general) 'COVID-19'

- Covid-19 was seen as 'old news' to most GHH customers as life had moved on
- There were now more pressing matters to worry about
- It was seen as something we'll continue to live with & adapt to, few feared restrictions would return
- But for VHH customers living with long term health issues or very elderly, concerns still exist in contrast to GHH customers. Some still wear a mask whenever they go out
- It means some VHH are even more isolated & alienated as the world opens up & some are still stuck mostly at home or limit going out

*"COVID is the least worrying of all of them. It's ruined our lives for two years and yet it's the least worrying thing on there"*  
York, GHH, Pre-fam, C2DE

*"But it (Covid) could come back at any point"*  
Bradford, GHH,  
Pre-family, ABC1

*"I don't think people would do another lockdown...(since) it came out about the Government parties."*  
Whitby, GHH, Fam,  
ABC1

*"It doesn't seem as scary as it was in the first place."*  
Whitby, GHH,  
Fam, ABC1

*"I still wear a mask if I'm on the bus, outside in shopping centres."*  
Whitby, Post-fam, VHH





# Language Analysis: Cost of Living Crisis



- While people are facing numerous issues in the post-pandemic world, the COLC is talked about as the **most immediate & personally impactful on their lives vs news headlines**
- For those already affected by it or who believe they will be affected by it, their language reflects **uncertainty about the future** – there is a feeling that financial pressures may continue to escalate
  - probably in part because bills are projected to increase again in October
  - but also because there doesn't appear to be a solution to the problem
- And in some cases it's also seen as a **threat to the wellbeing of their children's futures** – which illustrates how deep this sense of uncertainty cuts
- It represents another **disrupting factor to people's lives & routines** – having to cut things out of their lives like holidays or certain products
- For those affected it is the main focus of their attention – other more distant global issues are more or less off the radar

# Language Analysis: Pending recession



- Language around recession is more ambivalent vs other topics – **less emotionally charged**
- This seems to be partly because there is a **precedent for recessions** & many people experienced the 2008 recession & have come through it intact (less awareness of statistics looking at impact on issues like wage stagnation, impact on younger generations earning power, etc.)
- Much **more focus on COLC, gas prices/shortages that feel more tangible & immediate** than a potential recession which feels more abstract/less immediate

# Language Analysis: Government performance



- A great deal of the language used by respondents was concerned with **fairness & social division** when it came to government
- **Fairness is a powerful concept in UK culture** – it's a way that people rationalise social inequality & class difference
  - I.e. some may have more than others, but there are certain values & ideals we all hold to, including obeying the law
- Government scandals have challenged this belief in fairness & led to a more extreme sense of social division – a lot of the language is about the **government & politicians living in separate worlds to ordinary people**
- This reflects a **growing sense of distance & alienation from those in power** – that builds on growing distrust in government as well as the Brexit narrative around 'elites'

# Language Analysis: Ukraine war



- Language is characterised by a **sense of uncertainty**
- On the one hand the actual fighting itself is described in terms of distance – **it feels far away**
- But on the other hand the wider effects of the war are **more immediate & close** – gas prices, food process, shortages, etc.
- Which feeds into immediate issues like COLC

# Language Analysis: Climate change



- Respondent's language **reflects a kind of cognitive dissonance**
- On the one hand people acknowledge that they have been **exposed to more news & information about climate change** that emphasises how **important it is**
- And that something **needs to be done about it URGENTLY**
- But this sense of importance is not reflected in what they as individuals (& society as a whole) **need to do to prevent disaster**
  - There is a lack of clarity evident in their language about how the crisis could be solved
- And this is sometimes linked back to the **absence of leadership, information or guidance from government or other institutions about what to do**
- Which **undermines the sense of urgency** they take out of messages they encounter in the media or schools

# Life factors



## OVERVIEW:

- Social life, being more connected with family, relatives friends & feeling more engaged in their local community & the Yorkshire region were key future positives
- These became more precious due to Covid-19 & were things they had direct impact or control over
- Work, travel & leisure & education received mixed views: those in secure jobs were confident to travel & benefitted from education. Those in low paid, seasonal unsecure employment, or still fearful of travel were more negative
- Education, for some young people was becoming less enjoyable & more rigid or one dimensional: potentially stifling creativity or vocational abilities
- Water use & the environment also received mixed views: most were happy about their water supply & its quality they had little to complain about, but some did worry about a future where water would become the topic of global upheaval leading to mass migration & potentially war

## Life factors (most positive about in future) **'SOCIAL, FAMILY, COMMUNITY & YORKSHIRE'**



Freedom to socialise equals more fulfilling lives

Most expect restrictions to remain at bay so look forward to options to meet others

If restrictions return, this factor will shift to a very unwelcome negative

For elderly or VHH in poor health, socialising is still limited due to virus fears

*"You appreciate more the time you can spend with friends."*  
Whitby, GHH, Fam, ABC1



Families feel more connected to each other

Many have made more effort to connect with relatives

Zoom has prompted more ongoing reaching out to overseas relatives

Older people are enjoying seeing grandchildren more often

Not taking family & relatives for granted, more appreciative of each other

*"You make more effort to smile and say hello to people."*  
Whitby, GHH, Fam, ABC1



Most feel more connected with their local community

Some are getting more involved in local community groups & events

Many are proud of living in Yorkshire & its blend of urban, rural & coastal features

More likely to explore the region & countryside as antidote to get away from COLC & negative media

*"My little lad has just started (playing) football & it's a massive thing...for him it's a social life out of school...I do a bit of coaching as well so it's good for me to get involved"*  
Bradford, GHH, Fam, C2DE

## Life factors (mixed feelings towards future) 'WORKING LIFE'



If in work, then most are optimistic

Some are just very thankful to have a job at all

Hybrid working felt to be likely to be ongoing for office workers - which is welcome

Those in recent new jobs are excited by new opportunities – a key future plus point for those in pre-fam & fam segments

But for VHH if unemployed or unable to work due to poor health, then the notion of work is depressing as can seem out of reach & evoke feelings of alienation or isolation

VHH who lost jobs & received no furlough suffered significantly financially & are struggling to get back on their feet – more likely to already be in, or end up in arrears with utility bills

The emotional impact for those out of work is very distressing, but for those in work it's generally a positive

*"I appreciate work...I realise how lucky I am to have that job as it keeps food in the fridge."  
Bradford, GHH, Fam, C2DE*

*"I work a lot more now to pay for the cost of living."  
Whitby, GHH, Fam, ABC1*



## Life factors (mixed feelings towards future) 'TRAVEL, LEISURE & EDUCATION'



More positive if easing of restrictions continue / remain

But will easily shift to a negative if limitations on freedoms re-emerge

VHH elderly more nervous to travel as fears of virus or just used to not doing so

But being able to go anywhere helps mental health as able to look forward to things

*"It's (travel/leisure)  
important but it's not  
the most important  
thing in the world."  
Bradford, GHH, Fam,  
C2DE*



Young people saw education getting harder, more about tests & less about life skills

Parents hoped for more focus on child mental health

Older people sensed YP were becoming better educated & had more knowledge of the world

*"Children & young  
people are much more  
informed these days."  
York, GHH, Post-fam,  
ABC1*

## Life factors (mixed about in future) 'WATER USE & ENVIRONMENT'



Views towards water usage & the environment were topics that overlapped

Water use considered in isolation was not an emotive topic as it was of high quality, low cost, essential resource that rarely let anyone down

The vast majority had not seen any negative press coverage regarding sewage being overly disposed of into rivers & if they did, it was perceived to be elsewhere in the UK & not Yorkshire

But a small number of customers feared a potential bleak future, where drought in water stressed countries might trigger mass migration– 'water wars' were cited as a potential scary future concept



The key challenge with water usage attitudes & taking action on the preventing further climate/environmental damage was that any immediate outcomes were not visible to customers

But most welcomed knowing more about the need to save water– what are we doing wrong, how can we do things right?

Customers hoped Yorkshire Water would do more to educate customers & work together to help prevent big water supply/environmental problems in future.

# Water use & environment comments

*"I never thought much about it  
(water use) until today."  
Bradford, GHH, Pre-fam, ABC1*

*"My friend grew up in India and  
as a child she had to ration  
water...it opened my eyes a bit."  
York, GHH, Pre-fam, C2DE*



*"There'll be water  
wars (in future)."  
York, GHH, Post-  
fam, ABC1*

*"Climate change is something for the  
future...these things we're talking  
about (COLC, Gvt) are happening  
now...it (climate) is not as important  
as these other things as they are  
things we have to live with now"  
Bradford, GHH, Fam, C2DE*

## Life factors (more negative about in future) 'PHYSICAL & MENTAL HEALTH'



Covid has helped some to become more resilient, such as doing more exercise or developing a 'can do, 'will do' mindset

Staying close to family & friends is also a key mechanism to mitigate MH issues

Parents though, fear for the impact the pandemic, COLC & war are all having on their children's mental health – what will be the true impact?

The poorer the household, the more likely the anxiety, stress & negative impact on MH due to COLC – many more will be 'robbing Peter to pay Paul' to pay bills & rising debts

Those with health issues that limit ability to work, travel or socialise, will be hit harder financially & even more so mentally

Indication is the number of YW customers with mental health & finance problems is set to increase as COLC bites more households

They will need services to be empathetic, even more accessible & patient

*"We don't know what impact the pandemic is gonna have on children & people in general."  
Bradford, GHH, Fam, C2DE*

*"I went to A&E and I was sat there for ten hours."  
Bradford, GHH, Fam, C2DE*

*"There's so much suicide (around)...I know of three in two years all under thirty ...I am reading about twelve year old children doing it, my daughter is ten."  
Bradford, GHH, Fam, C2DE*

## Life factors (feeling most negative about in future) 'Finances & trust in authorities'



When looking to the future views on personal finances are discussed in conjunction with a general low level of trust towards authorities & big companies

Many don't trust why or don't understand how their energy bills & other costs are rising so sharply

It didn't make sense that energy bills were doubling even though customers argued they hadn't increased their usage

There was a general feeling of needing to be more wary & question things – don't believe all you read

Many seem angry about Government incompetence & rule breaking & don't have much hope that policy makers will help with the COLC

However, YW & water firms in general are not part of mistrust perceptions

Any negative media coverage on water was rarely mentioned, bills weren't known to be increasing & the quality of the service was seen to be high

So far, YW seems to be seen as 'one of the good guys' overall



# Finances & trust in authorities comments

*"COL, I'm freaked put about it a bit, but I am really good at eating chickpeas."*

*York, GHH, Pre-fam, C2DE*

*"My family live in Hungary... I can't afford to go see them."*

*York, GHH, Pre-fam, C2DE*

*"The wages you get paid just don't cover your bills."*

*Whitby, fam, VHH*

*"Authorities like the local council, started giving out food vouchers. That helped out massively." Sheffield, fam, VHH*



*"Shell have made all those profits so why are you (Gov) making people suffer..."*

*Bradford, GHH, Fam, C2DE*

*"How can you trust someone who says even though what you're using (energy) isn't increasing...doubles your bills."*

*Bradford, GHH, Fam, C2DE*

*"My gas has jumped up from £87 per month to £125."*

*Sheffield, Fam, VHH*

*"I lost a lot of trust in my company."*

*York, GHH, Pre-fam, C2DE*

*"Reece-Mogg...I just have no trust in them (Gov)."*

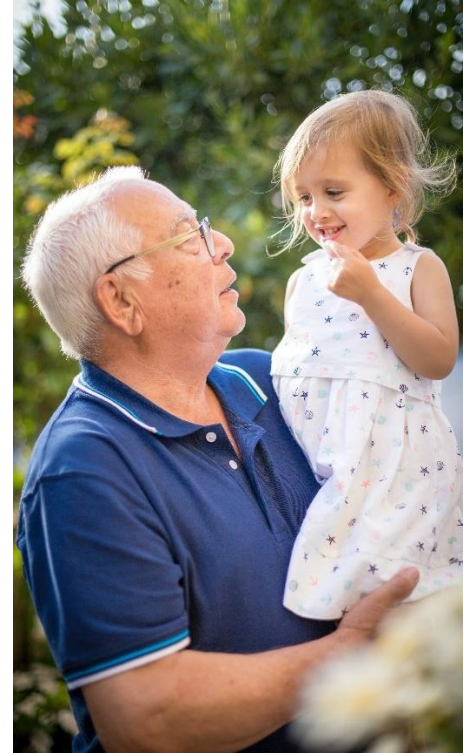
*York, GHH, Pre-fam, C2DE*



## Lasting positives hopes & dreams ...

*"Appreciation for my friends & family. It's not the materialistic things or money that makes me happy, it's the people in my life, things you can't buy."*

*Bradford, GHH, Fam, C2DE*



# Language Analysis



- One of the most striking things about a lot of the language regarding life in general is the prominence of words that relate to **thought and reflection**
- It's clear that for many people the disruptions and changes that the pandemic brought about have **caused people to think differently** on issues like work-life balance, the environment, the role of family and community
  - For some this seems to have been a benefit of having more time and more opportunity to experiment and try new things
  - Others were forced by circumstances to think about their lives differently
- The issues people tended to focus their attention on are areas that were initially affected and disrupted by the pandemic or by the issues that have emerged since – COLC, Ukraine War
- Things that have not been disrupted have not registered the same way
- This includes covid itself, which has dropped off the radar for many people



# Language Analysis: Water



- Another of these **under the radar issues is 'water'**
- Because people don't perceive any current threats or disruptions to their water supply & no major change to their bills it appears to be a **safe & stable part of their lives** – immune to the issues going on in the world
- Where problems with water supply are discussed they tend to be projected into a vague time in the 'future' vs the here & now
- However, the language people use when it comes to their water supply is sometimes characterised by a **lack of personal control** – people talked a lot about not knowing why a problem with their water supply occurred or how they could have prevented it
- And while YW always resolved any issues & was praised for good, reliable service, people were **uncertain about how they resolved it**
- Water does such a good job of just 'being there', that when people's attention is drawn to it, the technical details can be mystifying



# The future

## OVERVIEW:

- The future is viewed with a combination of **OPTIMISM** (liberation, connectivity, resilience & appreciation) as well as **PESSIMISM** (uncertainty, frustration, fear & mistrust)
- Work has & will continue to change for many: office workers are adapting to a hybrid (office & at home) working life & most appreciate the flexibility: people feel happier & hope hybrid working continues
- Digitization has & will continue to rapidly advance bringing both perceived **BENEFITS** (bridging generations, remote working, increased efficiency, etc) as well as **DRAWBACKS** (addiction for some, alienation for rejectors, increasing mistrust, etc.)
- Implications for YW of the changing workplace include continued higher home water usage offset by lower workplace use. With increasing digitization, multi-channel choice becomes even more important
- Customers want maintenance of perceived high water quality & service levels, improvements in infrastructure & communication, as well as a stable & predictable bill

# Customers have mixed feelings of OPTIMISM & pessimism about future

## Liberated

Easing of Covid restrictions mean freedom to enjoy life

## Connected

Newfound connection with family, friends & community

## Resilient

Self improvement & new skills learnt so better equip to handle future challenges & create opportunities

## Appreciative

A newer focus on the here & now, appreciating what we have that we took for granted pre-Covid

*If you look on the darkside you never get anywhere, do you...you've got to be positive to move forward."*  
Whitby, GHH, Fam, ABC1

*"Mixed feelings. Lots of change in the last few years & now you never know what will happen."*  
Bradford, GHH, Pre-family, ABC1

# Customers have mixed feelings of optimism & PESSIMISM about future

## Uncertain

Uncertainty & fear for the long-term prospects for society – life will be harder for the grandchildren

## Frustrated

Cost of living crisis impact on everyday decisions is overwhelming

## Fear

Anxiety as to where war in Ukraine could lead & no control or influence over outcome

## Mistrust

'Second rate' & untrustworthy political leaders

## Poorer

Expected growth in gap between rich & poor

## Climate crisis

Head under the blanket on climate change, aware we're not doing enough now & fear of problem getting worse that will become an urgent crisis

*"The gap between rich and poor is gonna widen."  
Bradford, GHH, Pre-family, ABC1*

*"Covid has made the future feel more uncertain."  
Bradford, GHH, Fam, C2DE*

# Working from home – past, present, future

## Negatives during Covid

**Isolated** – where are all my friends I used to chat to?

**Distracted** – by domestics, work & life blend in to one

**Guilty** – am I doing enough?

**Swamped** – by back-to-back zoom/Teams calls

**Torn** – by other life demands i.e. home schooling

**Anxious** – harder to share problems via digital means

## Positives during Covid

**Connected** – to immediate team as constant zoom meets

**Productive** – as no travel time

**Focused** – no office distractions

**Balanced** – less travel, no overnight trips,

**Appreciative** – more time than ever with kids or partner

**Trusted** – to get on with the job, no office presenteeism

## Now & future

Office workers are adapting to a hybrid working life

Most are appreciative of the flexibility to work either at home or in the office

Hybrid appears to make people feel happier about working life

Most hope the choice of hybrid working is set to continue

It will depend on employers to continue to offer this & so far many are

## Implications for YW

Home water usage for hybrid workers likely to be higher than pre-pandemic levels

Office water usage will be lower than pre-pandemic levels

# Digitization – past, present, future

## Negatives during Covid

**Addiction** – too much screen time, social media overload

**Exploited** – companies used as chance to ditch call-ability

**Alienated** – if digi-unable, even more isolated: v old , low inc

**Loss** – no face to face contact depressing for many

**Mistrust** – fake news, chat bots, lack of bespoke service, empathy

## Positives during Covid

**Enabled** – dragged technophobes up, Nanna on zoom

**Upskilled** – Nanna has never looked back, she's online loads now

**Efficient** – can work anywhere & meet colleagues from anywhere

**Connected** – rebuilt bond with long distant relatives/friends

**Choice** – I can buy anything & it will arrive tomorrow

## Now & future

Whilst many appreciate the benefits that digitization brings people at all life stages are concerned about its dominance in our lives

Young people are fatigued by how often they scroll & swipe

Families worry about the impact on their kids – how much is too much?

Post family folk worry about Great Nanna who didn't join the zoom quiz & never will

And as COLC bites the lowest income households, digital hard wear will be non-existent for some

## Implications for YW

Multi channel choice of engagement is ever more essential

Digital should be part of a blend of other touch points

Plenty still want to talk to a person on the phone

Particularly if reporting problems or issues with bills & payment

Be wary of the chat bot – they create a sense of companies avoiding helping customers properly as lack empathy & bespoke outcomes

Call centre teams will be under even more pressure to show empathy, listen & be patient as the COLC disrupts lives

# What customers want from Yorkshire Water ...



**Water quality:** keep to the high standard customers are used to



**No deterioration:** across all service areas, maintain the existing perceived good service



**Maintain or lower bill:** more important for VHH / low income customers. Although bills not seen as high, but would help manage other increasing costs



**Improve infrastructure:** to reduce leaks in the system & prevent volume of road works



**Inform:** to raise greater awareness of the wider role that YW has : how does water supply & waste management all work?



**Educate:** customers on state of the nation/region regarding water usage/saving behaviours & why this is needed. And on blockages: what are we doing wrong, what are the implications, how does this affect bills?



**Communicate:** more frequent updates on household water usage so customers can assess how or where they can reduce – more suited to metered but also non-metered for water saving environmental reasons. Some suggested an 'app' but needs to be multi channel to engage all types

# What customers want from Yorkshire Water comments

*"Improve the infrastructure so there is less leaks."*

*York, GHH, Pre-fam, C2DE*

*"It would be good to have an app so we know how much you are using."*

*Bradford, GHH, Fam, C2DE*

*"As long as there's not a shortage, I'm happy and as long as prices don't double"*

*Bradford, GHH, Pre-fam, ABC1*

*"They are more reassuring than any of the others (orgs), you have more confidence in them, they want to help you."*

*Whitby, GHH, Fam, ABC1*



*"When it comes to the environment, we hardly hear from Yorkshire Water...the raw sewage in rivers stuff, I think it was down south, not in Yorkshire"*

*Bradford, GHH, Fam, C2DE*

*"Carry on giving us clean nice water."*

*Bradford, GHH, Fam, C2DE*

*"Don't double me bill."*

*Bradford, GHH, Fam, C2DE*

*"Lower me bill"*

*York, GHH, Pre-fam, C2DE*

*"You can actually speak to them on the phone, a real person."*

*Whitby, GHH, Fam, ABC1*



# Language Analysis: Water



- Based on the sense of lack of control & low understanding of how water supplies work & what YW does, it feels as though there is an opportunity to **educate customers more**
- This could **improve their sense of control**, especially on those occasions when there are problems with the supply
- It would also help **sensitise** them to their water supply on a more day to day basis
- This in turn might help customers better understand why changes that need to be made in the future need to happen, e.g. manage climate change for example or maintenance of pipes

# 4. Key findings

## Non household customers

Outcomes from the non household customers



# Range of the sectors & business types engaged ...



Printing



Retail



Farming &  
Agriculture



Accountancy



Hair & beauty



Consultancy



Childcare



Construction



Care



Window  
cleaning



Manufacture



Photography



Hospitality



# Context

## OVERVIEW:

- Mixed current position with many businesses still being effected by the aftermath of Covid
- Water seen as essential for operation: legally & logistically
- Water uses as expected, although some businesses include water as an ingredient or part of their service
- Positive perception of YW, but little engagement
- Few small businesses 'shop around' for water & sewage
- Water & sewage is not a major thought or concern for most & bills perceived as relatively small & stable
- Significant price rises in other utilities are a bigger current concern

# Current business conditions & performance vary

- Some B2B businesses seem to be seeing a post-pandemic boost, whilst B2C are still under pressure
- **Covid-19 impacts** are still being felt by many:
  - e.g. hairdressers losing beauty customers who won't yet book holidays & some have learned to do hair or nails at home/ go longer between cuts
- **Cost of living crisis** already starting to have negative impact, especially B2C, service industries & where product seen as a 'luxury':
  - e.g. horse riding lessons, beauty treatments, hospitality, etc.
- However, a few are experiencing good fortunes:
  - e.g. product photographer benefitting from businesses diversifying
- But all look ahead with concern, especially those in consumer markets

*"Pretty good at the moment, but I expect a decrease in business with the increase in cost of living" (Manufacturer)*

*"Certainly business is good ... we're picking up clients ... it is not now that worries me, but in 12 months time" (Accountancy)*



# Water usage varied by business type, but was essential for all

*Key differences with domestic use*



**Ingredient**



**Part of  
service**



**Drinking  
water**



**Cleaning**



**Tea &  
coffee**



**Personal  
hygiene**



**Toilets  
(customers  
& staff)**

Those with offices had the expected use for water  
For some, water was an ingredient or part of the service  
e.g. soap manufacture, window cleaner, hairdresser, etc.

Most felt that without water they could not operate legally or logistically

*"If we didn't  
have water we'd  
have to shut"  
(Hospitality)*

*"Water to me is like a  
taxi driver without a  
car really: without  
water I can't operate ...  
& I need tons & tons  
of water every week"  
(Window cleaner)*

## Generally positive attitudes towards YW, but little engagement

- Most felt they were billed by Yorkshire Water direct
- Very few had experienced problems with supply or disposal of water & most wouldn't expect any issues
- The very occasional causes for contact tended to have been positive:
  - e.g. one hospitality business had also received a recent visit from YW educating them about safe disposal of fats
- No billing issues were reported
- Some specific issues with YW were mentioned, but these tended to be very location or customer specific e.g. an old rural sewage system needing investment, offices being in flood prone area, etc.
- A couple of moans about 'hard' water

*"YW had to come on our land to repair a leak on a neighbouring property, but they left it tidy. I was satisfied." (Agriculture)*

*"Every time I have phoned up [YW] the customer service has been good to be fair" (Manufacturer)*

*"Sewage: never had a problem, just goes down toilet" (Hairdresser)*



# Water & sewage costs were not a major concern for most

- Smaller businesses tended not to know much about their water supply & billing arrangements, because water & sewage was a relatively small overhead compared with other business overheads
- Only a few appeared to use intermediaries or had shopped around: Business Stream / Scottish Water seemed fairly prominent.
- A lot of smaller businesses seemed unaware they could 'shop around'
- Most felt there wasn't much point due to perceived small savings vrs potential 'hassle'
- Most saw water as a stable utility bill that didn't go up much in unit price: not a major worry
- A few used their domestic supply for business use & weren't metered, which meant their 'small' bill was also fixed
- Sewage was rarely considered by most businesses, unless they had experienced a previous incident or their processes involved large disposal (requiring advice and/or permission)
- Sewage bills were more of an issue with a few due to the perceived unfairness of the calculation method

*"It [water costs] doesn't seem to stand out on your bank statement as much as your gas & electricity. Where as you shop around for your gas & electricity, my water comes from Yorkshire Water & that's it" (Hospitality)*

*"I have a utility guy who tries to get me the best deal" (Printer)*



*"You don't look at your  
water bill; of all the bills you  
pay in life, water just seems  
insignificant. You never give  
it a second thought"  
(Window cleaner)*



# Other utilities are currently a bigger concern for most

- Most have experienced very **large price rises** in other utilities in past few months, especially energy
- With **no-price cap** on business energy bills, most (esp. those not on fixed rate deals) had seen significant increases
- Concerns were also about **future increases** & how they going to plan & afford these potential increases
- Many had already started to try & **reduce their energy consumption** where possible i.e. turning lights off, reviewing procedures / processes, etc.
- Those businesses that rely on 'tanked' energy, it is a **shortage of supply** as well as price rises that is currently concerning

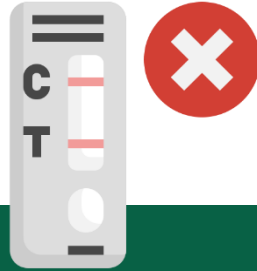
*"It's the gas at the moment ... it's not just the price, but getting it ... if it [water bill] start rising like the gas, then we're start worrying"*  
(Farmer)

*"The water bill is like a breeze at the moment compared to everything else ... it's the electric [bill] that is worrying more than anything"*  
(Hairdresser)

*"I'm not worried about it [water bill]. I am more worried about gas & electric which is rising at ridiculous amounts ... water is rising at a manageable rate"*  
(Printer)



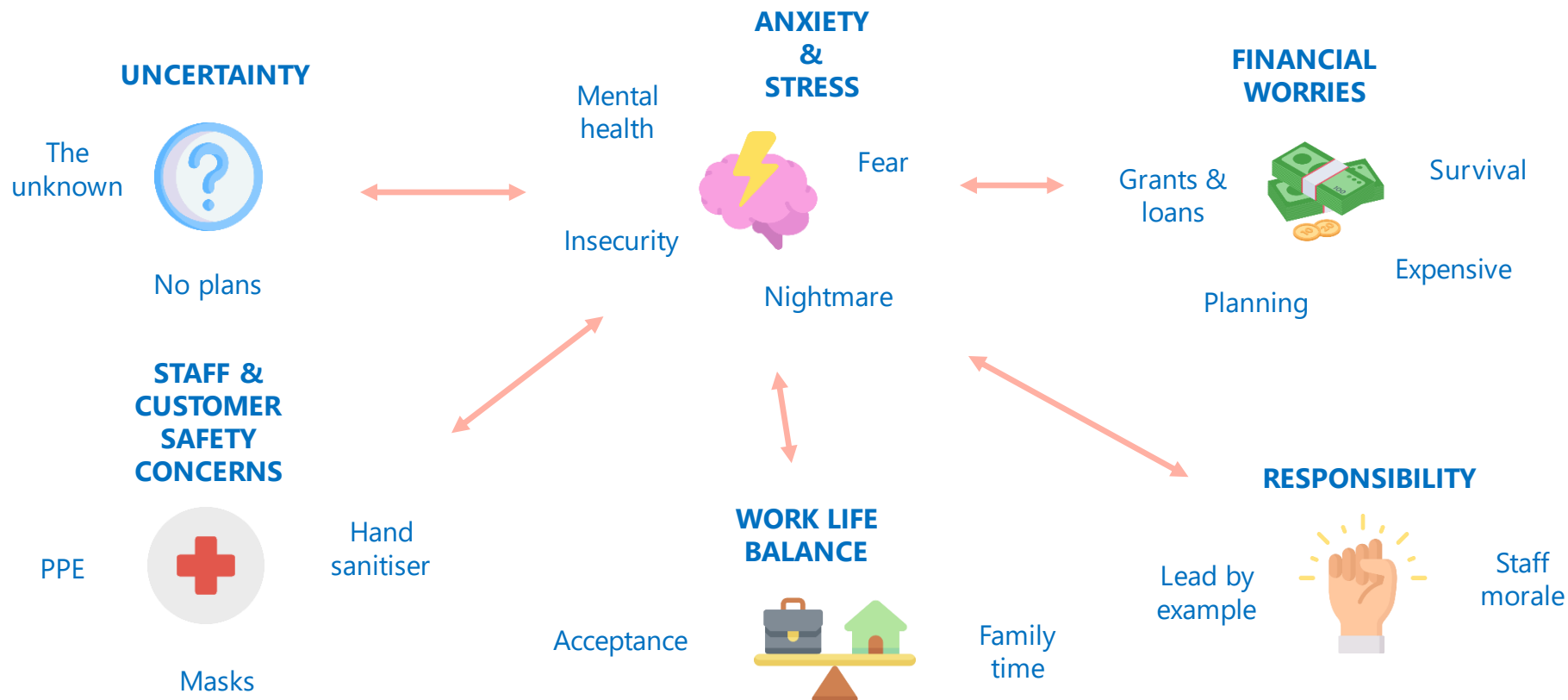
# Covid-19



## OVERVIEW:

- Covid-19 has been an emotional rollercoaster for most businesses as they deal with a 'once in a generation' pandemic
- Negatives included a financial 'hit', health & safety concerns, changing & complicated Government guidelines & regulations, failed new ideas & trying to keep their staff / teams going
- Positives included additional time to reflect, implementation of new processes, new products & customers, productive remote working & examples of increased 'kindness'
- Water usage did change for many with closures, home working, less travel & more washing & hygiene
- On re-opening, many businesses increased their water usage due to returning customers, continued extra cleaning / hygiene & new customers

# Covid-19 was an emotional 'rollercoaster' for most organisations



# The initial emotional reaction was fear: fear of the unknown

- Covid-19 was an unexpected & new experience for all
- Initial thoughts were:
  - How will my business cope?
  - How will we continue to operate?
  - Will we survive?
- No-one claimed to have planned for such an incident & as such there was a degree of working out what their businesses could do & had to do to be able to survive
- For many, income stopped overnight, causing anxiety, uncertainty & financial difficulties which impacted on the mental health of business owners & staff
- Some sectors such as farming, just cut themselves off fairly immediately & isolated to try & carry-on their essential services with minimal contact with the outside

*"We just shut down & kept ourselves to ourselves ... we just carried on as best we could ... people need food: you can't stop" (Farmer)*

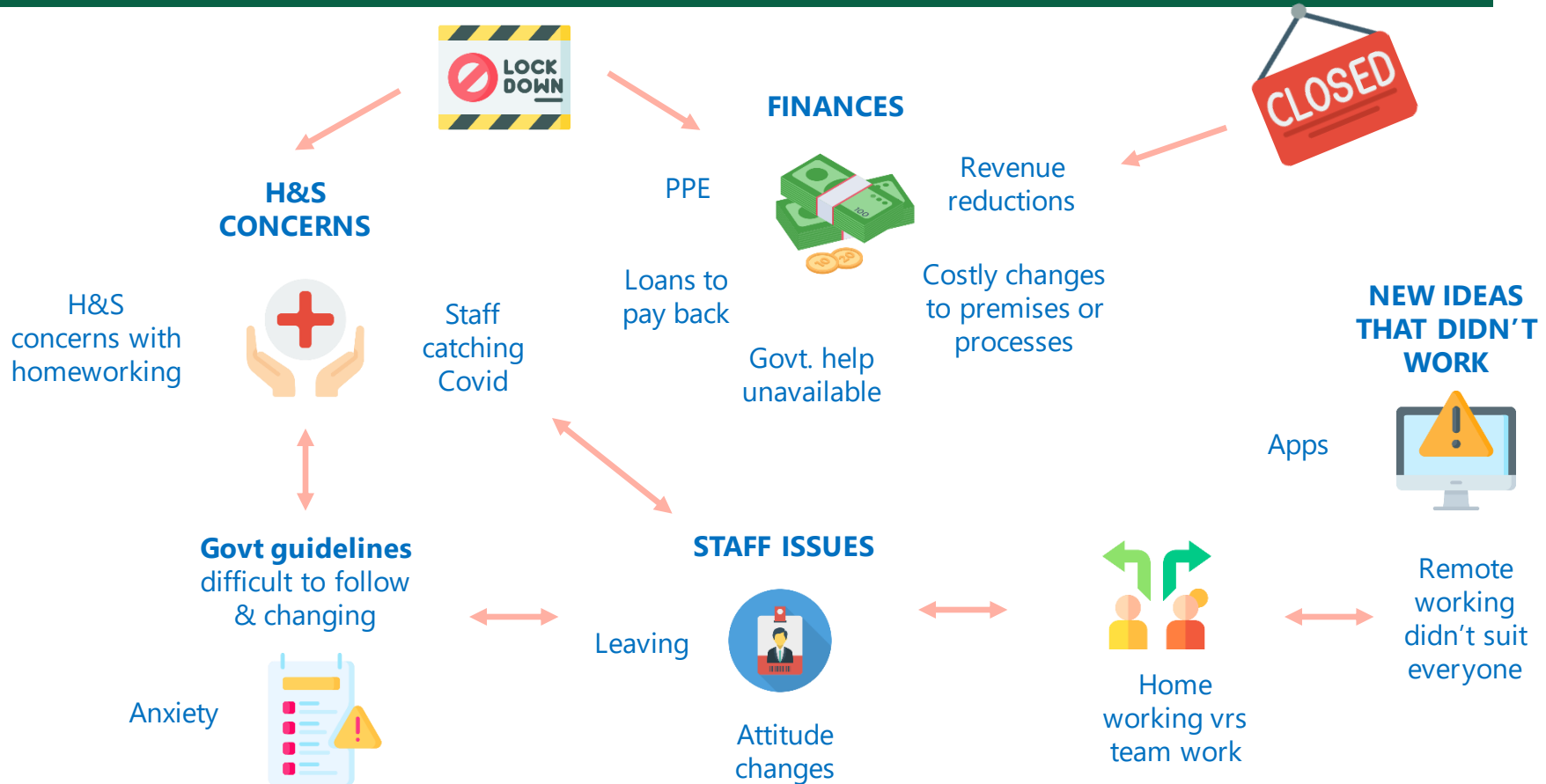
*"Everything froze initially as my clients didn't know what to do" (Consultant)*

*"Is the world going to come to an end?" (Printer)*

*"If we knew the pandemic was coming there is no way we would have opened. But we survived." (Hospitality)*

*"Fear, insecurity, nothing, because it was a really stressful time. I was so uncertain over what was going to happen with my business. I didn't know what the future was going to look like because overnight all my work just stopped." (Photographer)*

## NEGATIVE impacts included ...



# The additional costs of Covid-19 for business were numerous

- Apart from the inability to trade due to lockdowns & government restrictions & the associated reduction in revenue, additional costs were also experienced
- Supply lines for many businesses were negatively effected during the periods of lockdowns & restricted opening. These often resulted shortages & increased costs
- Some businesses struggled to acquire materials or products meaning they had to be organised & place bulk orders or face stress & higher prices e.g. paper the printer required, timber for manufacturing, feed & bedding for horses, hairdressing products for treatment, etc.
- When businesses were able to trade, especially those customer facing, the cost of PPE & Covid mitigating requirements, such as screens, sanitising stations were all additional costs at a time of decreased revenue
- For those office based, there was the cost of moving staff home with the appropriate technology. Most felt this was a challenging but successfully transition, with their service to clients being maintained as much as possible

*"Disposables & face masks are my memories after the initial stress. It was so expensive – we had to buy in all these masks, then donated them to the NHS in the next lockdown and had to buy more afterwards"(Hairdresser)*



# Government help was not fault free

- There were isolated issues of furlough payments being delayed that did cause stress for a few
- Due to the nature of furlough, Directors of small businesses who paid themselves through dividends were excluded, which disappointed most of these businesses
- Some isolated disappointment about there not being more help from some sectors e.g. hospitality got support with getting customers back through VAT reduction, but not others like hairdressing
- Where these were loans & not grants there is some ongoing concern over the fact these still need to be paid back when trading might not be back to normal; however, some lenders appear to be flexible if payments need to be rescheduled
- Some took the govt loans, not because they needed it at the time, but rather as 'insurance' if things got worse. Others felt they didn't need it, so out of principle didn't take or were concerned about paying back debt in the future

*"I took everything [help/grants] I could get ... we did quite well to be fair" (Hospitality)*

*"I work in people's houses, so work was gone. The first two lockdowns, I was stopped completely & had the handouts from the government. But the third one I didn't take because work was thankfully starting to pick up then."  
(Construction)*

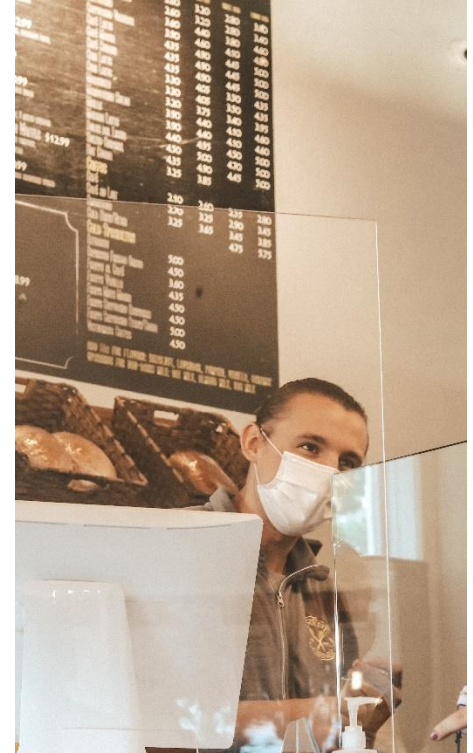
*"To be fair I didn't use it [Bounce Back Loan]. It just stayed in my bank account for a 'just in case' & touch wood I haven't had to use it"  
(Hospitality)*



# Government regulations & guidelines were a challenge to comply with

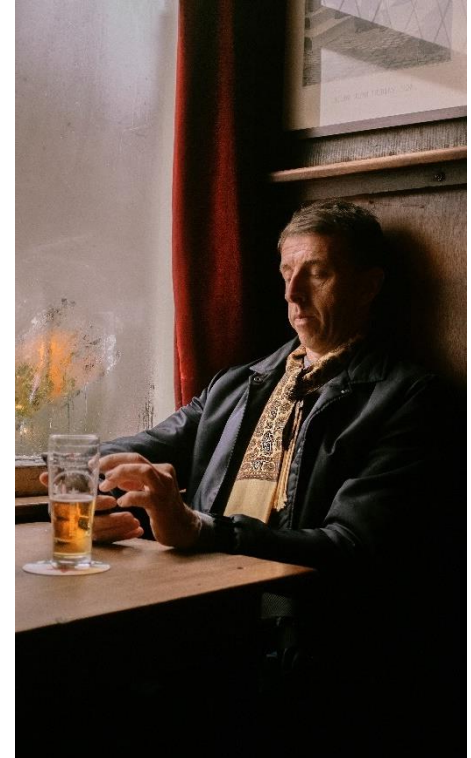
- Government specified several exacting regulations & guidelines for many sectors during the pandemic
- Government guidelines for businesses were often seen as complicated, difficult to understand, were open to interpretation & changed through the pandemic, especially for some industries such as beauty
- None wanted to intentionally break the regulations; some were worried that they were unwittingly breaking the rules; which added to any existing anxiety
- The guidelines also meant additional costs & impacted the day to day efficient operation of many businesses; e.g. pubs having waiter serve all customers meant a significant additional cost
- Many of them also impacted on the atmosphere & their ability to perform the services of their business; as such, despite concerns about future resurgence of the pandemic, many mitigations have been dropped by some

*"Pubs are social places & we found it really difficult to interact & for people to feel relaxed when you're there with gloves & masks on"*  
(Hospitality)



# Not all new ideas worked & will be carried on in the future

- Many revised their offerings & set-up new products & new ideas to maintain the operations during the pandemic & in-line with government regulations
- However, not all have carried on into the post-pandemic period
- A good example of this is the hospitality business that had a range of evolving government guidelines & restrictions.
- Pubs that had beer gardens were able to carry on, & many invested in outdoor shelters, 'substantial' food offering, mobile phone apps for ordering, card payment only, etc.
- Despite significant investments some will not be carried on as they were not popular with customers, especially in traditional hostelrys with an older clientele who never really took to ordering via an app. Many of the old ways of operating have returned for some e.g. cash acceptable again

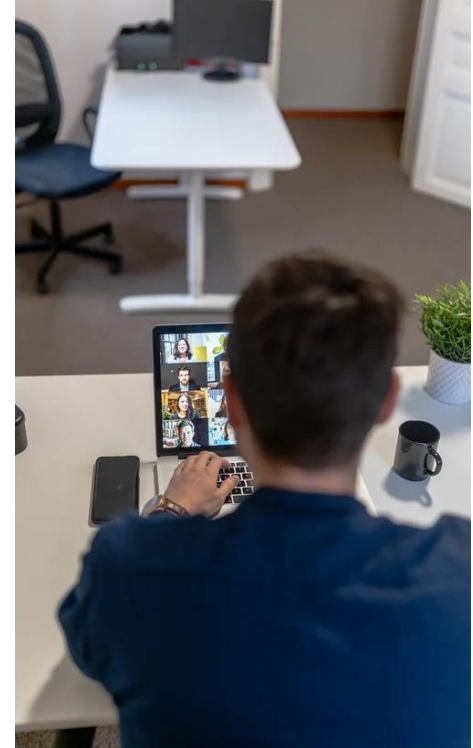


# Many staffing specific issues caused & still cause issues

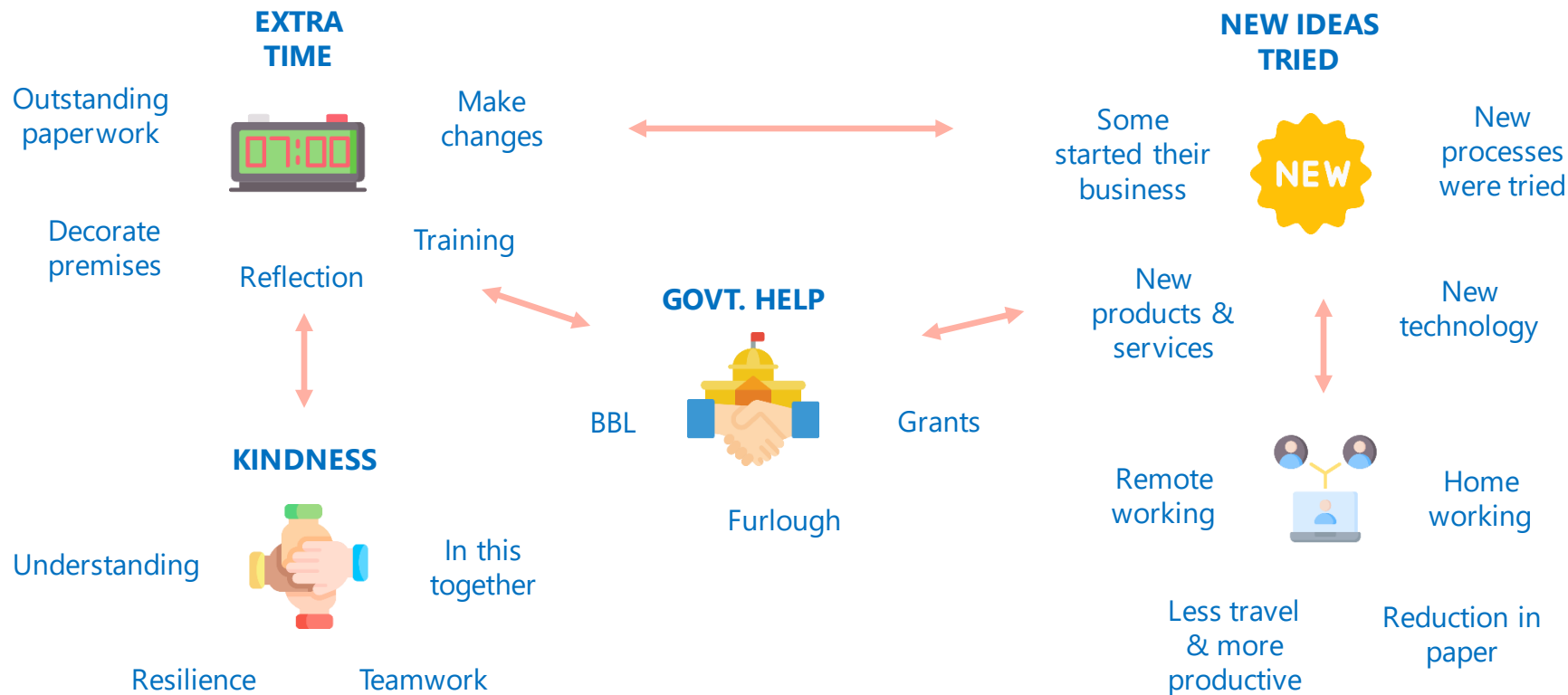
- Businesses placed great value on supporting their employees through this challenging time of worries & concerns. There was the feeling that staff were grateful for this at the time
- Staff returning overseas (part due to pandemic & part Brexit) caused significant skills shortages especially in sectors such as hospitality & care
- Many moved to home working (where this was possible) during lockdowns
- Home working & furlough appears to have changed many staff's attitudes towards work with many wanting more flexible / hybrid working. As such, employers in some sectors are struggling to find the right balance especially those open evenings & weekends & reducing staff hours presents significant challenges including a reticence to take on new staff due concerns about the future
- Pandemic has caused some new skills gaps amongst school leavers who are viewed to have lost valuable communication skills & work ethic attitude

*"Staff morale was low as they couldn't go to competitions or go out on a hack. I tried to keep them on doing bits of work as they were good staff."*  
(Agriculture)

*"There has been a big culture change due to the pandemic ... people aren't willing to drive to work anymore"*  
(Printer)



# Many businesses found some POSITIVES in the pandemic ...



# Covid-19 allowed slowing life down & brought out kindness in some

- An enforced step back from the stresses & fast pace of running a business was welcomed by many
- Time with family was appreciated by some, but was not necessarily good for business
  - Benefits of slowing life down will have lasting impression for some
  - Also allowed some to look at their own working patterns e.g. now building in down time between projects to reduce stress
- Many businesses experienced some positive & touching moments of gratitude & generosity from customers who didn't want to see them go under
- Some experienced a greater appreciation for local businesses from customers

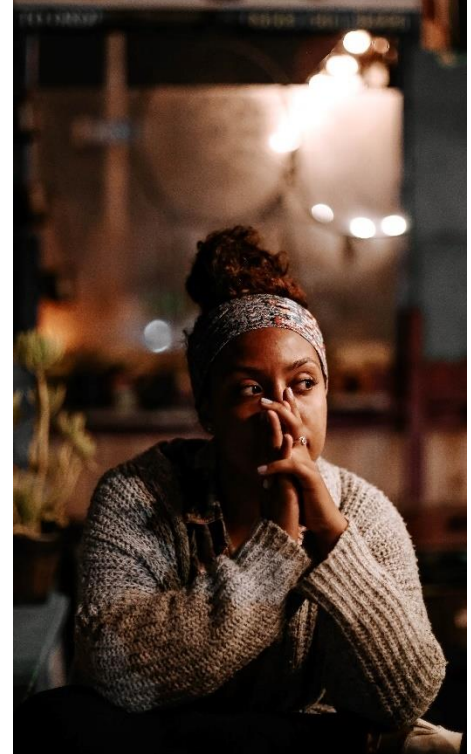
*"There were some positives, not always from a business side, but everyone slowed down & the yard became less stressful. Customers became more appreciative. It brought us all more time with our families too" (Agriculture)*

*"I've seen such human kindness & positivity from people who don't want to see you go under. Clients have been very generous" (Hairdresser)*



*"I didn't really like the relentlessness of the way I was working before. But I did start to think I should start to spread it out. So that I'm not constantly chasing the deadline so I can start the next job on the Monday. And then it made me start to think about maybe putting a week gap between jobs to slow it down so I could enjoy the work more."*

*(Construction)*



## Enforced closure meant some had time to make positive business changes

- Closure meant that some businesses were able to undertake jobs that they never previously had time for
- These included:
  - Decorating (overdue!) of beauty salon
  - Building a website offering online ordering for manufacturer
  - Rethinking of printing processes & new tech
  - Dealing with long-standing & overdue paperwork
  - Building of outdoor / covered seating (still up & being used)
- Most business owners felt that they used this time wisely & it was useful



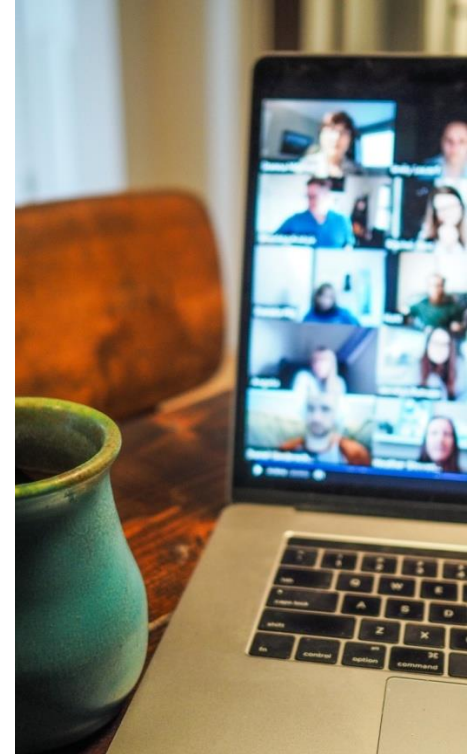


# Covid-19 allowed positive business changes, especially digitally

- Digital acceleration was a common experienced by many businesses
- Home working was relatively uncommon before the pandemic, but most office based operations had to move to some degree of home based operation in a relatively short time
- Increased use of online meeting tools such as Zoom & Teams was noted by many, which has increased productivity for some used to travelling to see clients
- Some trends such as card & digital payment were also accelerated: e.g. before pandemic window cleaner had 80% of clients paying by cash from him door knocking. This has changed to 70% by bank transfer
- Digitalisation has also accelerated for many professional services e.g. accountants have noted many process now accepted digital signatures

*"70% of customers are now bank transfers ... been collecting money for many years before [Covid], but it was a pain knocking on doors .. but this Covid transformed all of that & I haven't knocked on anyone's door since" (Window cleaner)*

*"Clients are happier meeting online which reduced my travel significantly & allows for a better work life balance" (Consultant)*





## Some businesses were able to pivot towards the new pandemic market

- A number of businesses diversified or pivoted with great success:
  - An event photographer that was forced to move to event photography with huge benefits to turnover, stress levels & work life balance
  - A furniture maker successfully started making desks for home workers
  - A printer moved to printing Covid signs & stickers for local businesses
  - A local rural pub provided a new takeaway service & food supplies for locals
  - A consultant adapted a previous in-person training product online at the request of his client. Now a regular offering without the need for long drives!
- Some also benefitted from a welcome focus on shopping local, bringing new customers at a time they were needed
- Many have kept some of these new services: if they are felt to be still financially viable & wanted

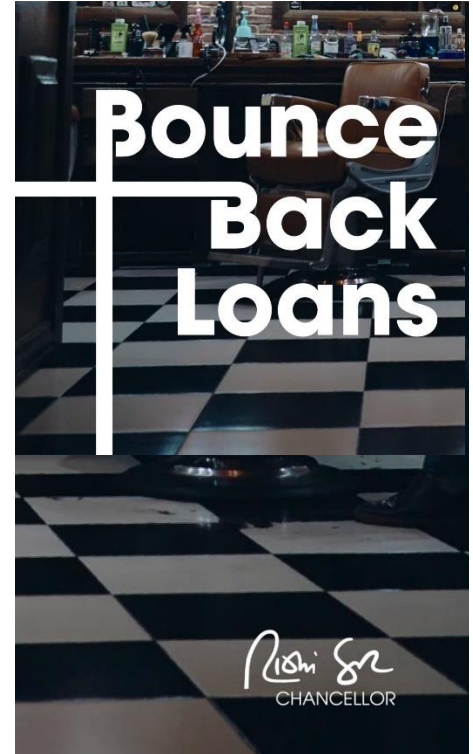


# Govt. financial support played a vital role for many businesses

- Many received govt grants & loans helping to financially get through the pandemic
- Some felt they would not have survived without them, even if also drawing on personal funds too
- (BBL) Loans were said to be generally easy to apply for, quick to be received & were at low interest rates
- Furlough was frequently used by those with a workforce & saw a downturn. Feedback was generally positive, despite concern over the restrictions
- Local gov. grant schemes were available for some sectors i.e. High St. & enabled diversification of one business with great success: £1k invested in new equipment & other businesses receiving £1k to spend with other local businesses leading to new work

*"At the beginning there was nothing coming into the bank. The grant got me over the initial bit. My landlord allowed me not to pay two instalments. The combination allowed me to survive" (Hairdresser)*

*"These grants were responsible for the new direction of my business"  
(Photographer)*



## Water usage did change for many businesses during the pandemic ...



**Less people in the office:** homeworking often meant water usage in workplaces reduced. Current hybrid working means usage still reduced compared to when offices & work places were full



**Less travel:** those previously based at & working from home found they used more water due to not going out to see clients & sites e.g. professional services



**More hand washing:** additional personal hygiene meant customers used & are still using more water cleaning hands e.g. hospitality



**More cleaning:** some sectors, when open, had significant additional cleaning requirements which increased water usage e.g. beauty & hair



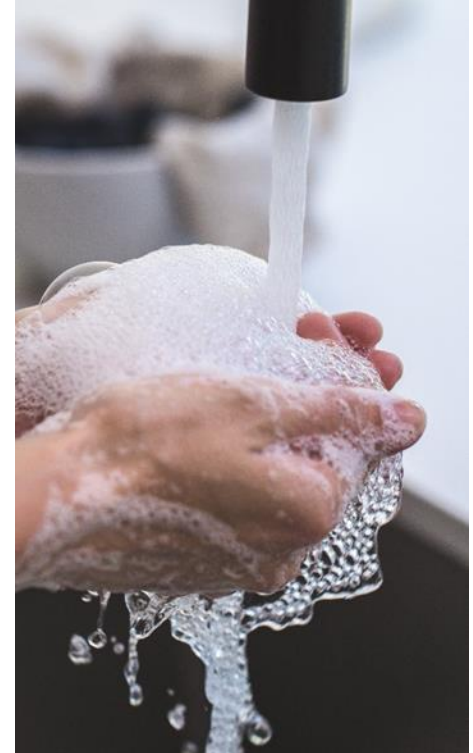
**New & returning customers:** additional business since the ending of restrictions has meant usage for some has increased e.g. window cleaner has found new customers, hotel has seen more staycationers, etc.

# Water usage has increased on reopening due to hygiene

- When allowed to reopen most felt water usage had increased, mainly due to staff needing to be hygienic, increased demand for cleaning, & (where relevant) customers wanting to be more hygienic too
- Some sectors needed to introduce new working & cleaning protocols
  - e.g. not doing dry cuts in hairdressing and customers having to wash hands which also enforced increased water usage
- Other businesses have also introduced new protocols that save water
  - e.g. use of disposable towels in hairdressing saving on laundry water usage
- Little expectation of changes in future, as changes are likely here to stay for now
- Isolated examples of usage increasing due to business growth e.g. a photographer building a new studio for running workshops & window cleaner continuing to take on new customers

*"People's habits have changed, they are more hygienic, so we are definitely using more water."  
(Hospitality)*

*"I use tonnes of water & my usage had gone up"  
(Window cleaner)*



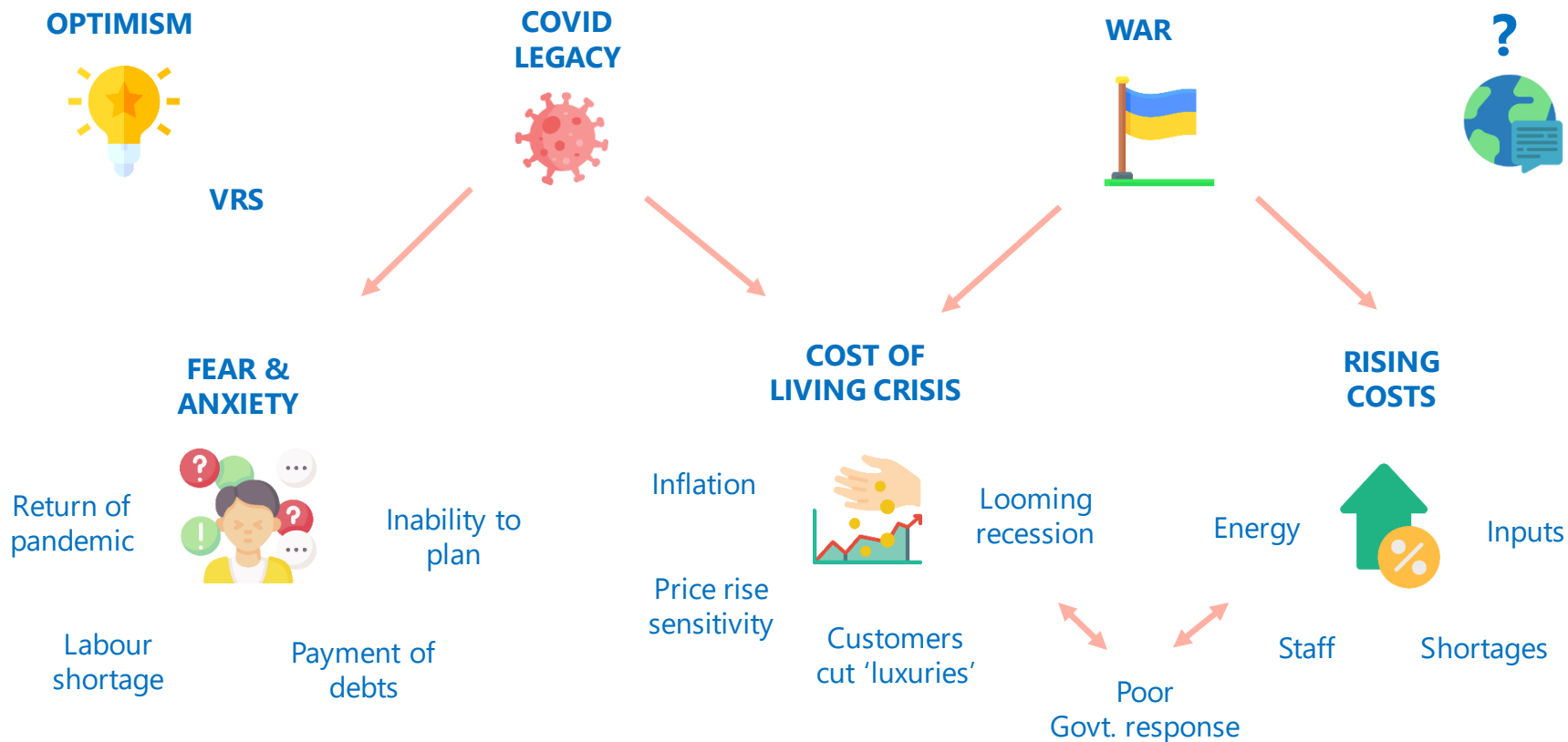


# The future

## OVERVIEW:

- Mixed feelings about the future: inherent business optimism vrs pessimism associated with the many challenges ahead
- Some Covid-19 impacts have lasted & are still being experienced
- The cost of living crisis is a worry & is already effecting businesses
- Business costs continue to rise & many not convinced the govt is helping
- War in Ukraine & resultant supply shortages another big worry
- Difficulty in future planning: still lots of uncertainty
- The environment is less of a current concern esp. for smaller businesses

# The future is challenging for many businesses ...



# Businesses have mixed feelings about future with many facing uncertainty

## Optimistic because ...

- You have to be as a business owner!
- Those diversifying or growing are excited about the future & possibilities for their business
- Some efficiencies from pandemic to stay e.g. remote working
- Better equipped to face challenges post-pandemic, particularly technologically
- Increased resilience due to surviving the pandemic

*"My new studio gives me cause for optimism, I'm really excited to move that forwards, though the build costs are a worry."  
(Photographer)*

## Pessimistic because ...

- Uncertainty due to so many big challenges on top of recovery from pandemic
- Cost of living crisis impacting on the amount that customers are willing to spend
- Supply shortages impacting on many sectors e.g. hospitality & agriculture
- Increase in cost of inputs / energy continues with no-end in sight
- Ongoing staff issues due to skills shortages
- Ongoing impact of the Ukrainian war
- Possible return of pandemic & restrictions

*"If we can cure our staffing problem I would be optimistic"  
(Hospitality)*

*"With the Ukraine war & everything that is happening I can see the price of feed going up and up and so I'm pessimistic." (Agriculture)*

# Covid-19 is still a large influence on most business operations

- Whilst many govt. dictated restrictions have been abandoned, many still have kept some despite the cost due to customer demands
- Some customers are still wary of catching Covid, especially those with close contact with customers or have older customers
- Extra cleaning regimes, often costly, have been maintained by some
- Some customer lockdown habits have been maintained which means some are only slowly starting to return; E.g.
  - Doing their hair or nails at home
  - Drinking at home instead of going to the pub
  - Takeaways instead of eating out
  - Continued working from home means city centre footfall is down for some

*“We are still cleaning down everything before the next customers comes in because it obviously it has to be hygienic ... we're forever cleaning all the time” (Hairdresser)*

*“It's a kinda luxury going to the pub isn't it ... they're [customers] are drifting back” (Hospitality)*

*“People have got used to paying supermarket prices ... eating & drinking out is a luxury” (Hospitality)*



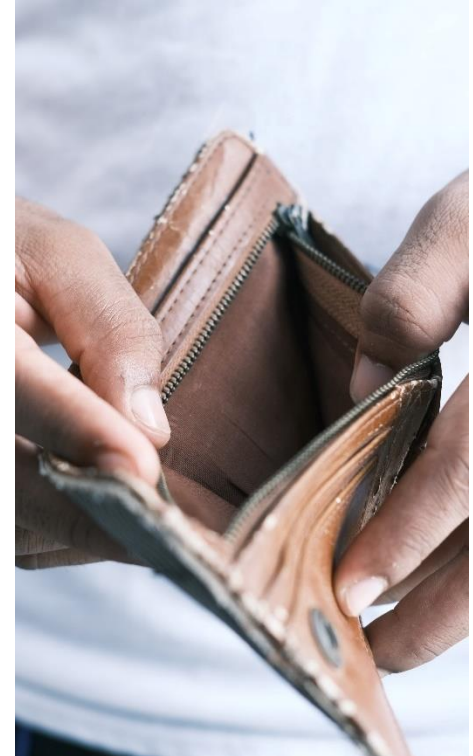


# Cost of living crisis is a worry & is already effecting businesses

- With inflation rising rapidly for consumers, some businesses are already noticing customers reining in their spending
- Perceived 'luxuries' feared be the first to go for consumers feeling the pinch; e.g.
  - Going to the pub less often
  - Delaying hair-cuts & colors esp. if less holidays, weddings, etc
  - Reducing leisure / shopping trips due to high fuel costs
  - Delaying major purchases such as furniture
- The fact that many consumers survived without some products & services during the pandemic make some businesses worry that this might happen again when money is tight

*"Because of the cost of living, horses are seen as a luxury. We are seeing a reduction in the number of people having lessons. It is going through another slump right now."*  
(Agriculture)

*"Things are getting better but not back to what it was. People have learned to live without luxuries, don't have nails done as working from home or not going on holiday"*  
(Hairdresser)



# Business costs continue to rise & many not convinced the govt is helping

- Despite many receiving government help during the pandemic & being mostly appreciative, many of their policies are increasing business costs
- Both minimum wage & national insurance increases have recently been imposed on business & have added to the costs of employment
- Brexit, whilst not as in the forefront of the news, appears to be contributing particularly to the labour shortage, especially in industries such as hospitality
- Many seem unconfident in politicians or the government's ability to successfully steer the economy during the Covid recovery phase & the cost of living crisis response

*"I think the government has a lot to answer for ... the government could do something about utility costs [for business] if they wanted to ... about time we got somebody new in" (Hospitality)*

*"Doesn't matter who we go for politically, they are all a joke, all of them, both sides. We haven't had a decent politician for years" (Agriculture)*



# War in Ukraine & resultant supply shortages another big worry

- The war in Ukraine & its impact was another common concern among businesses
- The war was already impacting many supply chains & exacerbating 'supply shortages' & cost increases for many e.g. wheat, chicken feed, fertilizer, cooking oil & timber
- It is also the uncertainty around how long the impacts will continue & the potential for escalation that worries many businesses
- This uncertainty then feeds in the inability for many businesses to forward plan with any confidence

*"Since the Russian invasion, my workload pretty much died overnight, literally went off a cliff. Energy prices & the cost of materials rocketed. The problem I've got right now is sourcing materials at all. A lot of the material I use is birch ply, which all comes from Russia" (Construction)*

*"In all honesty I expect a terrible winter due to the War in Ukraine & the resulting availability of feed, it's hard to look beyond that" (Agriculture)*

*"You just don't know how it (war) is going to turn out" (Consultant)*



# Future planning is difficult for many businesses at the moment

- There are many future uncertainties to consider that make planning difficult for businesses
- Many businesses are finding it difficult to look beyond the next 12 months, or even the end of this year, especially those in the consumer market
- With so many current challenges in the short-term, distinguishing between those & long-term ones is difficult
- The impacts of a variety of challenges, most notably the cost of living; increasing overhead costs; skills gaps; labour shortages, supply shortages; & the war in Ukraine are hard to look beyond
- This appears to be negatively impacting confidence & business investment plans for some

*"In terms of my business I don't tend to think that far in advance, it's so hard to know what the political landscape will look like?"*  
(Photographer)

*"Everybody's so unsure about the future. That's having a big impact on me. They don't know how much the bills are going to cost"*  
(Construction)



# The environment is less of a current concern esp. for smaller businesses

- Concern & actions about the environment appear to have taken a back-seat in light of the pandemic & cost of living crisis, particularly with many smaller businesses
- Environmental concerns are seen to be important & most felt they should be doing more, but there is felt to be just so many immediate worries to deal with
- More immediate concerns about their businesses' future, the economy & war seem to have taken over
- Although there was seen to be some positive environmental effects of the pandemic in terms of greater use of remote technology, more home working & less commuting

*"With everything going on in the world, I don't seem to think about it [the environment] as much" (Window cleaner)*

*"There has been a big culture change due to the pandemic ... people aren't willing to drive to work anymore" (Printer)*

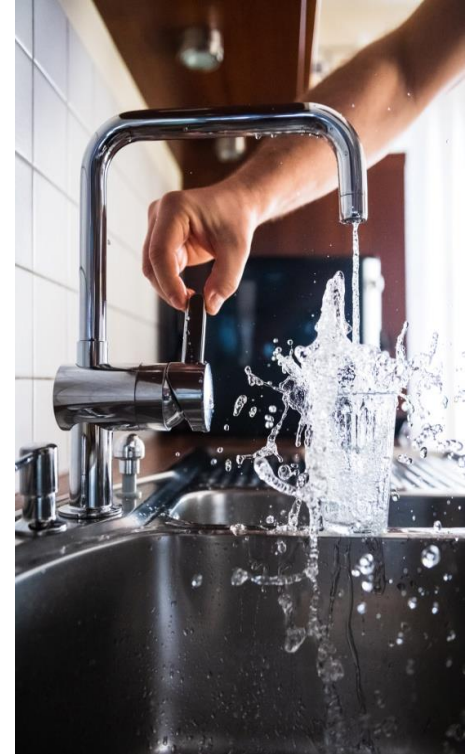


# What business customers want from Yorkshire Water ...

- Water is not a major concern with either supply or cost, but is vital to business
- Because most have not had any past issues with YW, they want their supply to continue to be consistent, reliable & safe: as it is now, for the most part
- However, most would like YW to continue to invest in what most realise is an aging network
- Most realise that YW have a business to run, but they hope that any price increases will be minimal
- It is important to bear in mind that increases to water bills will present a challenge to many businesses in these challenging & uncertain times

*"No price hikes & getting on the bandwagon [of rising prices] ... it's about [YW] making a fair profit & not being greedy" (Hospitality)*

*"I don't have any issues with YW. I think they, as far as the country goes, are reasonable in their costings, reasonable in their supply issues. They need to get on top of maintenance & certainly pollution that they cause as there is an environmental issue." (Hospitality)*





# Case Studies



## Case study 1 – Hairdresser worried about the post pandemic future

- Hair & beauty business based in West Yorkshire since 2004 with 5 employees
- Water critical is to operations with wet cuts when reopened but water usage balanced out as also using disposable towels.
- Covid-19 forced closure on the business overnight. Even when allowed to reopen huge barriers existed: one customer in the building at a time; staff wanting to work fewer hours; expense of buying PPE
- Used furlough but a source of anxiety as waited long time resulting in debt
- No support with encouraging customers back as there was in hospitality (VAT relief)
- Business better now but not back to pre-pandemic. Customers now colour / cut own hair or view beauty treatments as a luxury
- Future hard to predict i.e. will the usual summer rush for pre-holiday treatments happen; will the winter see another closure?
- Major challenges in short term: cost of living; supply shortages; skills gaps due to T-levels not coming back until 2023; & customer expectation higher than ever
- Hard to look beyond the short-term, may eventually need to lose staff





## Case study 2 – New café received help from landlord & YW

- North Yorkshire café, opened in 2019 just before the pandemic; employees 10
- Water critical for hygiene & consumption reasons: they couldn't open without it. Don't have any dealings with YW direct as part of a service charge paid to landlord
- Recently received positive YW visit about safe disposal of fat
- Covid-19 forced closure on the business overnight, but kept afloat with landlord halving rent & recovery funding from govt. Worried debts need to be paid back
- When allowed to reopen customers were cautious & some staff had returned overseas or decided not to return. Led to skills shortages e.g. chefs & labour costs have gone up as a result as existing pool demanding higher pay
- Very few positives – staff are more hygienic & allowed valuable time with family
- Major challenges in short term: skills gaps; cost of living; increased operating costs; supply shortages e.g. beer; & local government not helping small businesses
- Expect staffing & supply shortage issues to be impacting for next five years



## Case study 3 -Photographer pivots services & uses local govt. funding

- Photography business based in Yorkshire since 2013; sole trader
- Water is just an extension of life as have a home studio, but looking to build a new facility in garden for workshops.
- Covid-19 caused fear, uncertainty & impacted mental health as income as an event photographer stopped overnight
- Chose to diversify offering free product photography to local businesses
- Enabled by two local gov. grant schemes: £1k to invest in new equipment & businesses receiving £1k to spend with other local businesses. Many opted for product photography for new websites.
- Hugely successful as turnover is better due to high demand; less anxiety as more planning time; & allows a better work life balance
- Concerns in short term include: fear of another lockdown in the winter; cost of living resulting in businesses not spending on luxuries such as photography & also studio build costs becoming unaffordable



# Key findings

## Stakeholders

**Outcomes from key stakeholders**





# Stakeholders

## OVERVIEW:

- Stakeholders came from varied areas of work & relationship with YW, so their perspectives also varied
- Views from charities, including debt & mental health, environmental bodies, the public sector & service partners
- Organisational negative impacts included disruption to their operations, services & finances
- Negative Covid impacts for their clients included both financial & physiological
- Positives of Covid were far fewer, but included: community response, digitisation, resilience & more agile partnership working due to zoom/Teams for some
- Concern about ongoing impacts of Covid merging with & exaggerated by, cost of living crisis

# Stakeholders come from very varied perspectives

**Debt charities**

Stakeholders used as a collective term but organisations were very varied in terms of their area of work or focus & who they represent

**Environmental / nature based charities / bodies**

'Water' & what Yorkshire Water does or does not do has a more direct impact on some stakeholders than others e.g. Local Authorities and nature based charities

**Mental health , older age & mobility charities**

Some have a close working relationship and/or knowledge about Yorkshire Water & others were much more distant

**Local Authorities / MPs**

For those currently working in partnerships which include Yorkshire Water, the direct contacts they have were seen as positive & effective

**Service partners**

As stakeholders have very different agendas & experiences their answers reflected this although there was a core narrative regarding concerns around challenges faced by organisations & society as a whole.

# Negative Covid impacts included disruption to operations, services & finances

## On the organisation / charity itself:

- **Long term strategic plans often put on hold;** a lot had staff and/or partners on furlough
- **Firefighting at the time** e.g. LAs distributing financial assistance or charities plugging gaps in support, so a focus on the immediate short term rather than pushing on strategic developments
- **Face to face collaboration suffered:** meetings & working parties moved virtually & lost some impetus
- **Funding challenges:** debt charities in particular had a big increase in demand but less income from referrals & corporate funding (often resulting in staff redundancies & therefore less help available)
- **Environmental charities unable to do tasks with volunteers:** so many initiatives put on hold, so now a couple of years behind on actions
- **Nature charities lost many volunteers** (as not meet up and do) & less funding (e.g. unable to attend Shows / Fairs), so there is a need to build lists up again
- **LA dealing with societal changes:** change in demand for public transport, increase in WTF & fewer using city / town centres posing challenges



# Negative Covid impacts for clients included both financial & emotional

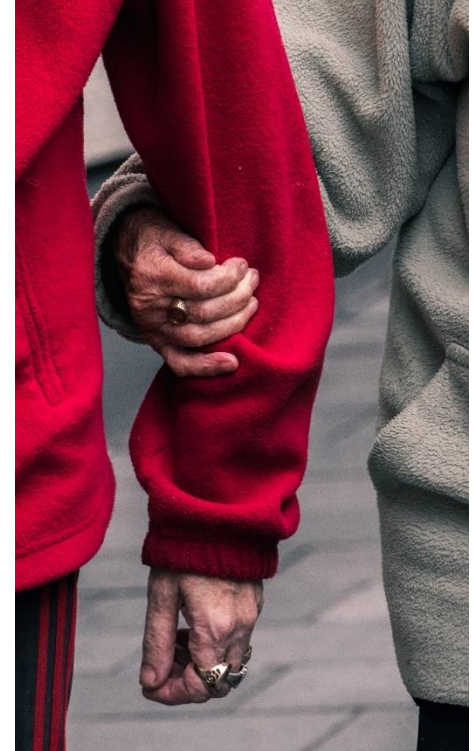
## On people or areas they represent ...

### Economic/financially/socially vulnerable:

- Financial struggles if lost job or not receive furlough support
- Increase in mental & physical health issues
- In some cases death of partners / carers
- Fewer carers in the sector, but more demand
- Social isolation & sense of helplessness
- Move to digitalisation not suitable for all
- Demand for products/services down: linked to closure of restaurants/pubs/offices

### Environmental / nature / wildlife:

- Increased water use domestically e.g. hot tubs; gardens; hand washing
- Projects requiring groups of volunteers (e.g. tree planting) put on hold
- Pressure on some sensitive environments due to increase in visits during lockdown





# Negative impact comments

## On organisations

*"I think COVID had a huge impact on the way we go about work. We've got reduced number of people in the office ... face to face partnership meetings during COVID was one of the things that really sort of dropped off. I think getting back to that is critical for delivering the outputs and objectives we're keen to deliver with the Living with Water board" - LA*

*"It impacted us at the time. How much it impacts us in the future is harder to tell. But my feeling in terms of the short term was not having people to work on projects, and not being able to move projects forward. It is too early to see what sort of long term impact that will have on the environment. On a positive front, I think people are more interested in the environment because they've seen it during lockdown; how long that will last is another question, though" - Environmental charity*

*"We've seen a lot of suppliers fold because of the pandemic"*

*...the partnership working had to take a bit of a second place...a different tack to where we were...like a large gathering (previously)...has been slightly held back."*

## On people

*"It's led to a lot of long term illness. It's led to debt and probably poverty, due to people losing their loved ones. Now, we're referring people to food banks, every single day. We're getting people with long term COVID that can't work, living in isolation, deprivation. So, for us, people needing our services has increased massively. From January to the end of April, we received a 400% increase in calls to our service and over the past three years from beginning to post pandemic 98% of our clients are brand new never seen before"*

*"We've seen a massive increase in relation to people's mental health challenges as well"*

*"The number of families that are likely to be tipped in to poverty (is staggering)"*

*"Not everybody is digitally savvy. Certainly, the people that we see in the communities through the Money Buddies, nearly all of them are not digitally savvy, so that [moving services online] would be a problem"*

*"Probably seeing the impact on individuals...we were a conduit to helping people who suffered from Covid...the Government used us to hand out (money) to businesses and residents...we saw the impact...money just dried up (for businesses) and individuals weren't getting an income (from employers)...it stopped overnight."*

## On environment / nature / wildlife

*"The pandemic stopped us being able to get outside, we couldn't get out with our volunteers to actually help and work on the rivers"*

*"But a lot of things were on hold until after the second lockdown"*

*"We had a couple of large projects ongoing at that time, which we had to mothball mainly because we couldn't get the volunteers out in the field to help us. It held us up, it just stopped us from being able to get on with the work we had earmarked and it put us back six, nine months. We lost that that summer to be able to get on with things"*

*"It's about making sure people use the waste water (functions) for what they are meant to be used for.... (and educating customers about the right use) to prevent more big budget repairs being needed"*



## Positive impacts included ... (but far fewer than the negatives)

- **Community response:** to look out & help each other – particularly noted by LA stakeholders
- **Choice of how to work & work-life balance:** brought about by shift to more working from home & new hybrid approach
- **Speedy economic bounce back:** in areas with stronger tourism / days out offering
- **Resilient mindset amongst households & businesses:** got through Covid, can get through anything
- **Government support:** esp. furlough helped keep organisations afloat
- **Speeding up of digitisation** plans & roll out has brought efficiencies & cost savings
- **More engagement** with & interest in local nature & wildlife: hopeful that this will continue going forward
- **Improvement in partnership working** was felt by some & has greater potential by having online meetings as easier to bring a range of organisations, including water companies, together in one session

## Positive impacts comments

*"It's about time, we had a grown-up conversation about hours at work, and, you know, what is possible for people, because then if they're able to do other things, as well as go to work, it does tend to make them a bit happier in the workplace, more productive?"*

*"I think it has highlighted to people that how important water is, it's another reason why we need water to keep up the hygiene side of things, and, and then the online work, and I think there's been a big plus, that's come out of it, it's accelerated that sort of transition"*

*"Recognition of the environment has been more valued...from the wider general public...we saw a significant increase in people reporting things like tree felling, which was a sign...an uplift in visitors to those sites...a clear bounce back as people took the opportunity to (get out)"*

*"I think people do seem to sort of be looking out for neighbours, the community more but it does vary from street to street"*

*"I think the main impact from COVID was the immediate coming together of local communities, along with service providers including Yorkshire Water, to ensure that those at risk in the community were safe, had food, had utilities, had medicines where required. And that was pretty-well remarkable in our area"*

*"If it doesn't kill you it makes you stronger...there's definitely that mentality amongst residents & businesses."*

*"I'd like to build on people's newfound appreciation & value for the countryside"*

## Feelings about future: short term to get worse (COLC) & partnerships will be key

**For the areas they work in or the people they represent, most are concerned about the immediate future:**

- **Current cost of living crisis:**
  - Gas & electricity bills, food costs, petrol, inflation
  - Impacting more & more people
  - Expect many new entrants into poverty
  - Knock-on affect to businesses as operating costs rise & revenue dips as customers squeezed
  - Full impacts still to be realised but bleak picture ahead
- **Environmental challenges:**
  - Net zero: actions needed now to reach future targets
  - Less funding available
  - Can see solutions taking a back seat due to cost of living & limited scope to raise water bills to pay for significant change

**However, some hope going forward:**

- Feel partnership working will have to increase to achieve common goals
- Tighter legislation will be needed to force environmental changes
- Technology innovations will help service delivery & communications become more efficient & help save money

## Feelings about the future, comments

*"I think the sector has got a much better understanding of what it needs to do. I think the risk is the funding of the improvements that are needed. So there's going to need to be another burst of investment in sewerage networks and reservoirs.... And it's coming in at a time when there's a cost of living crisis, pressure to keep bills down, and how do those two things match up? ...my concern is...some of the things we need to do just be like put off, because we need to be really careful with customer bills and their ability to pay their water bills"*

*"We are trying our best to be optimistic, but unfortunately, we can't you know, the challenges are coming from all directions"*

*"Things are getting more challenging than ever for utility providers...the regulator wants more & more assurance they are getting 'bang for their buck'...for consumers things are getting more & more expensive."*

*"Climate change is a massive thing that will affect society – we have to have an eye on the bigger picture as well as the short term pressures people face"*

*NY is very strong from a tourism product (POV)...they have been able to bounce back very quickly...income from our car parks recovered very very quickly...people came in to Richmond to do their walking....and booked B&Bs*

*"I'm also keen not to live in a virtual world for ever."*

*"Sadly, I think we may have to scale down ambitions for the environment. I think some of the ambitions are right but it's a challenge balancing the costs and the desires of or what the population needs"*

*"I think there is a bumpy road ahead for some of the Rivers Trusts simply because the amount of available funding from our traditional funders, groups like the Environment Agency, and Defra, Natural England is going to get cut and we're not going to be able to rely on that ... and then we're all going to be looking for other pots of money ... we're all going to end up looking in the same pots and that's going to be diminishing as well"*

*"Innovation is massive. Long term sustainability delivering more for less, then we need to introduce more tech & innovation...& it's about aligning organisations"*

## Ongoing impacts of Covid merging with & exaggerated by, cost of living crisis

- Less about Covid now with focus & impact from the cost of living crisis being felt by those who deal with debt
- Expecting impacts to get worse for those already struggling or just about managing financially
- Debt charities have seen massive increases in demand & workload – many 'clients' never seen before
- Shift to digitisation of many services has left some of the most excluded even further behind & even more invisible
- Whether engagement from the public with local wildlife & nature continues is unknown, but what is certain is that environmental groups & organisation have several years of project work to catch up on
- Some expect short term focus of cost of living crisis, war in Ukraine will delay action on climate change

*"Providing financial help and support for those who are struggling to pay the water bill, that that got to be a priority for us and providing support to those in vulnerable circumstances. I think there's going to be a need for a step change because there are more clients that are vulnerable now than before the pandemic, some people have been left with long COVID, some people who are vulnerable have lost their carers to COVID"*

*"It impacted us at the time. How much it impacts us in the future is harder to tell. But my feeling in terms of the short term was not having people to work on projects, and not being able to move projects forward. It is too early to see what sort of long term impact that will have on the environment. On a positive front, I think people are more interested in the environment because they've seen it during lockdown; how long that will last is another question, though"*

## Going forward stakeholders are keen to work together more with YW

### Partnership working:

- A key priority for majority of stakeholders who want to work closely with Yorkshire Water & others to tackle dilemma of short term COLC pressures & longer term impact on environmental / climate change as urgent actions perceived to be on hold / delayed

### Emphasis on prevention:

- Stakeholders recognise that fixing sewer blockages & leaking pipes is costly & causes disruption to customers.
- So better educating customers about the consequences of putting wipes down the loo or why reducing water use is important, there could be greater benefits long term e.g. fewer blockages, reduced cost of fixing problems, protection of water supply to meet growing demand



# What want from YW, comments

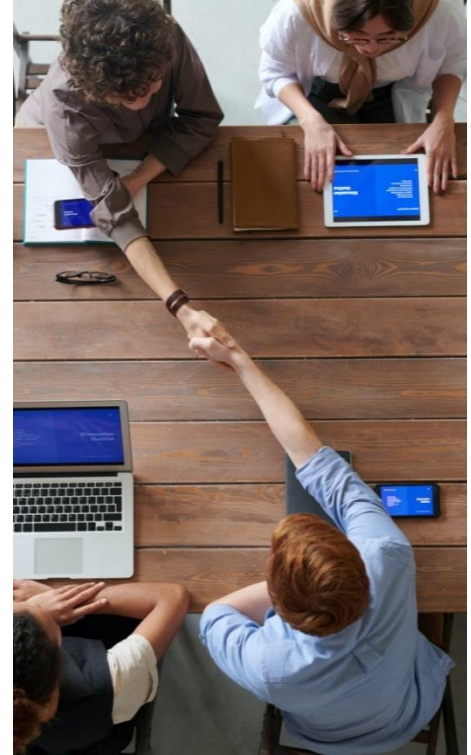
*"...need to look a lot more left shift towards consumers...the education (side of things)...going forward really focus in on the customer itself...so that things are used for their purpose (i.e. what to put down the loo and what not to)...data science is going to be key to identify the (main problem) areas...I say left shift a lot – getting back to the nucleus ...rather than deal with a blockage, invest in why that blockage occurred in the first place"*

*"The collaborative piece, early consultation on any initiative ...my recommendation is look at the partners you have around you, tap in to them early ...use it"*

*"(Climate targets) organisations need to do something rather than say it now...it's a bit of a lip service ...might have a 5 year road map but all they've done is cut down diesel by two percent...but most organisations are in a constant fire fight to deliver KPIs, ODIs, regulatory...space is needed to be able deliver (green initiatives)....collaboration is more important now than ever...organisations like Yorkshire Water can operate in isolation so collaboration is going to be key...we've got the right people in Avove now to lead on this...& I am looking forward to introducing them to YW"*

# Conclusions

Main conclusions from the 3 research strands





# Conclusions: Covid-19 - negatives, positives & lasting changes

## Covid-19 pandemic is now more a legacy than an immediate concern for most

- Overarching **negatives** have been the downward spiral of mental health & finances caused by restrictions to freedoms. Being unable to hug Nanna or the grandchildren, having to close the pub again, canceling yet another group meet up - all contributed to customers feeling frustrated & depressed at times.
- For those in vulnerable circumstances with health issues, low incomes or elderly, the pandemic made worse their already restricted lives & caused them, at times, to feel even more isolated. Whilst digital tools were a lifeline for many, they were inaccessible to certain vulnerable groups, which further contributed to some being alienated & invisible.
- But there were plenty of **positives** as many customers from all backgrounds took advantage of video conferencing tools to stay in touch with each other. More time was spent with the kids than ever before, people became closer & more appreciative of their local community, they learnt new skills, enjoyed new hobbies, businesses diversified & innovated – which all contributed to a sense of having some level of control, ongoing personal development or business improvement
- The pandemic has triggered a range of **lasting changes**. Many possess a mindset of resilience: *'we got through Covid so we'll get through anything'*. Customers are far more appreciative of things they took for granted, things that don't cost money, like a walk in the countryside, saying 'hi' to neighbours, connecting with long distance relatives. But for some it has left a permanent mark on their lives, even if at a very subconscious level
- But customers & businesses alike are focused much more on the 'here & now'. Most are tentative about longer term planning or thinking as, whilst Covid-19 can be regarded as 'old news', it still exists. Elderly or health stricken vulnerable customers are still nervous to go out & will wear masks, some businesses still pay for extra cleaning & to protect staff. And there are **permanent changes** such as hybrid working & a broadly more digitally capable society, which bring more positives than negatives, but they do not suit everyone

# Conclusions: water usage during pandemic & future

## Water use increased during pandemic, but is less now - but attitudes to saving water in need of education

- Lockdowns were the primary cause for **increased water usage in households**. Whilst it was a necessity - as more cups of tea were made, loos flushed & dishes washed more frequently – use of water also provided ‘something to do’, a way to pass the time of being stuck at home. Hot tubs were bought, paddling pools kept the kids happy, the car cleaner than ever & the garden looked wonderful. It was also an unconscious source of mental comfort and reassurance at a time of great disruption
- For businesses with **offices, water use dropped dramatically**, due to the shift to working from home, those that had to close, like pubs & barbers, the taps were off until further notice. But for those still able to work, such as farmers & window cleaners, water use remained similar or increased due to growth in demand
- In **current times, water use has dipped** within households, as restrictions have eased & customers enjoy freedom to leave the house. But while some have returned to the office, the hybrid approach is popular, so home usage for these customers will still be higher than pre-pandemic levels. On the contrary, **for businesses with offices, usage is slightly up** from the days when all workers were forced to stay home. This is also the case with non-office businesses that have opened up such as manufacturing, hospitality, salons & retail, & water usage is back as they welcome customers, yet still have many of the Covid mitigations, such as extra cleaning & hygiene in place
- Likely certainties in the future are hard for anyone to predict, although hybrid working looks set to stay as it works well for employers & staff. But customer **attitudes with regards to any need to save water** due to potential future issues with supply & demand, are mostly based on a feeling that we possibly should be doing more. Most rarely think about water, it's always been there when required, it is rarely a problem. So if there is a need for YW to encourage behaviour change to reduce usage, customers are open to being educated – they want to do the right thing, but they need to understand why, what to do to help & what impact it will have?

# Conclusions: how customers feel about now & the future

**The cost of living crisis, war & mistrust in government & large organisations are kicking the climate change can down the road as customers focus on creating new routines to manage and stabilise everyday challenges**

- Customers do possess a **personal sense of optimism** as the pandemic is seen to be behind us. But when looking at the world around them customers outlook veers towards pessimism
- The **cost of living crisis poses a key threat** to household & business customers. For those on lower-middle incomes & below COLC is disrupting everyday life choices. Luxuries that make life enjoyable are increasingly on hold, how to pay essential bills that were rarely a worry are now front of mind issues. Those on very low incomes, decisions increasingly focus on who to pay or not to pay, heat or eat?
- For YW more HH & NHH customers will fall into bill arrears & may not see you as high on their list when considering which creditor to pay. Customers who were once direct debit payers & had never been in water debt could reach this threshold in the very near future
- The **war in Ukraine, media coverage of Government 'partygate'** & perceived greedy energy companies combine to paint a bleak picture of life now & in the near future. This causes customers to think about what control they have over their lives, how can they themselves make things better – rather than hope the institutions around will do it for them. There is a reluctant acceptance that little can be done about Putin, Boris and Shell, but things can be done about how we choose to respond. Resilient, self improvement mindsets, appreciating the joys of family & community are helping customers to be positive & get through the myriad of negative macro factors
- One potential loser amidst the multi-level crisis is **climate change**. Customers freely admit that more needs to be done now to tackle a long term problem that will become more urgent. But they find it hard to step out of the here & now to think about how their daily behaviors will eventually impact their great grandchildren. Very few mentioned sewerage levels & rivers, it is nowhere near most people's worry bag. Climate change, environmental improvement & **water saving** agendas are mostly out of sight & out of mind, unless large institutions like YW & its many partners decide to raise greater awareness & get customers involved in initiatives that may make the future less challenging for generations to come.

# Conclusions: stakeholders big picture view

## Stakeholders have two big concerns: impact of cost of living & the knock-on effect to climate change

- Stakeholders echoed much of what customers & businesses revealed about Covid & thoughts on the future. Their own organisations & the people they serve have all had to adapt to **new ways of living & working**. The role of digital & **technological innovation** has been an essential facet in ensuring they have been able to continue to serve their own customers or residents
- But the accelerated jump to a digital world has come at a price. **Partnership working**, which once benefitted from face-to-face group meetings, has taken an understandable, but partly frustrating, back seat
- Whilst some say that zoom sessions brought benefits to ensuring partners from anywhere could gather at any time, there is a sense that it doesn't quite work as well as **in-person gatherings**. Many hope this can return with momentum.
- **Stakeholders across the spectrum really value Yorkshire Water**, it is seen as a key partner that impacts peoples' lives in many ways. They are keen to work with you to help tackle two big challenges: the cost of living crisis & environmental improvement
- Debt charities & local authorities are already witnessing a rapidly **increasing level of people falling into poverty**. Demand for food banks & debt advice is swiftly rising. They also expect a **high proportion of businesses to fail**
- **Stakeholders with an environmental role are concerned**, although are understanding, that the acute focus on livelihoods is & will deprioritise actions associated with preventing further damage to all things associated with climate & environmental sustainability
- Whatever their particular focus, stakeholders welcome working with YW to consider a way forward to help customers who are struggling & also preventing the planet from suffering any further.

# Conclusions: implications for & requirements of Yorkshire Water

## Opportunities do exist amidst a growing set of challenges

- The continued growth of inflation shows no sign of slowing down, which in turn means life is going to get harder for many customers on modest or low incomes or struggling firms, which will equate to an increase in those who can't pay. Even for those on higher incomes/business revenues, some will be less willing to pay for water company investments as they too will be wary of rising costs. Under these circumstances the stability and reassurance (as well as stable bills) of water will be a source of relief for many customers.
- A knock-on affect of financial pressures is a decline in mental health & wellbeing, which has been seen throughout this research. In seeking to help customers in financial difficulty, YW may need to consider how it handles an increasing volume of customers with anxiety, depression & feelings of isolation & loneliness with compassion
- Linked with this is digitization. In order to ensure all customer types can access YW, multi channel communication formats need to be made available. A phone call may become even more important than ever to some, as they long for someone to listen to them & show they understand. Companies who can show empathy to their customers at times of crisis will be the ones they trust the most. Those who choose to offer a digital only comms channel will quickly move to the low trust pile in customer perception
- If YW wants to push forward on any part of its environmental agenda, customers may be less able to help contribute financially, but they indicate being more willing to help practically. Raising more awareness of what not to flush down the loo & how to reduce water use are likely to land well if customers understand why this is important & the associated consequences. Some gentle and basic education about how their water supply works (e.g. simple, memorable facts) will help people better understand the potential effects of climate change
- Stakeholders are eager to build a stronger partnership with YW. Given the challenges customers & subsequently YW will face, the power of joining forces more habitually to benefit from the expertise & leverage that your stakeholders possess, could be key to helping Yorkshire Water to tackle to the mounting storm ahead.

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