



# Exploring views on Climate Change

November 2021



InSites Consulting



# Background

## Objectives

Climate change is an increasing concern, and the challenge is constantly growing. It's particularly pertinent to Yorkshire Water and customers because water and wastewater services are dependent on, and affected by, the weather.

Given the reliance on the natural environment, Yorkshire Water believe it is important to be transparent about the risks that climate change is already bringing, and also the part they are playing in preparing for these risks and minimising impact on the environment.

It's important to understand customer views on the issue, to help prioritise actions and comms. Specifically, this research aims to explore...

- Customers' awareness and thoughts on climate change – how serious an issue it is, and where has knowledge come from?
- Awareness of customers' own impact, awareness of their own climate change risks, any adaptation steps being taken and how YW could help support.
- Customers' awareness of Yorkshire Waters' climate risks and carbon reduction strategy – Are YW doing enough, and focussing in the right places that customers support?

## Methodology



### Stage 1:

Online survey with **388** members of the Your Water community

25<sup>th</sup> – 30<sup>th</sup> August 2021



### Stage 2:

2 x online focus groups

Group 1 – 7 x customers engaged with climate change  
Group 2 – 7 x customers less engaged with climate change

4<sup>th</sup> November 2021





## Key Findings

YOUR  
WATER



**Customers understand** the threat of climate change and **want to help**. Many, however, are unsure as to the best way that they can personally make a difference.



**Positive messages** (rather than doom and gloom) **are welcomed** as well as guidance on how to make a difference and information/data on what difference they are actually, personally making – today and tomorrow, as well as collectively (within their community and throughout the world).



**The more engaged audience feel they are already playing their part**, and want others (from individuals to Government) to step up and do more – both to protect us now, and for future generations who will be impacted the most.



**The less engaged audience feel that they lack a certain amount of knowledge** and evidence around the impact of their individual involvement when it comes to changing behaviour, and seek the motivation to encourage and push them towards the 'engaged' camp. **They want to know they are achieving** their goal and to be part of the universal success (rather than lose faith and become demotivated).



**Yorkshire Water is highly respected & trusted** – but expected to make environmentally responsible decisions on behalf of their customer base to benefit them and the planet. For this reason it's the outcomes, rather than strategy itself that's of most importance to customers.



## Recommendations

- **Continue with the great work already being achieved** around the carbon strategy plan, and **communicate** progress clearly throughout the community.
- Prioritise areas of the strategy that will have the **most impact**, but focus communication on outcomes, and those **things that have visible outcomes** so that customers can see change for themselves.
- **Give customers evidence** that what you do and what they can do makes a real difference. Highlighting the difference made to their own local area, will help increase engagement.
- Continue to make **suggestions to customers** (and local groups like schools) on ways that they can improve their own carbon footprint – where this requires behaviour change, demonstrate financial or convenience benefits, to help overcome the barriers.
- Take a reward (rather than punitive) and **positive approach** in all communication around climate change issues. Think little and often, to build awareness over time rather than expecting messages to stick instantly.
- **Shout about success stories** and competitive advantages Yorkshire Water has over other organisations e.g. faster net zero targets.

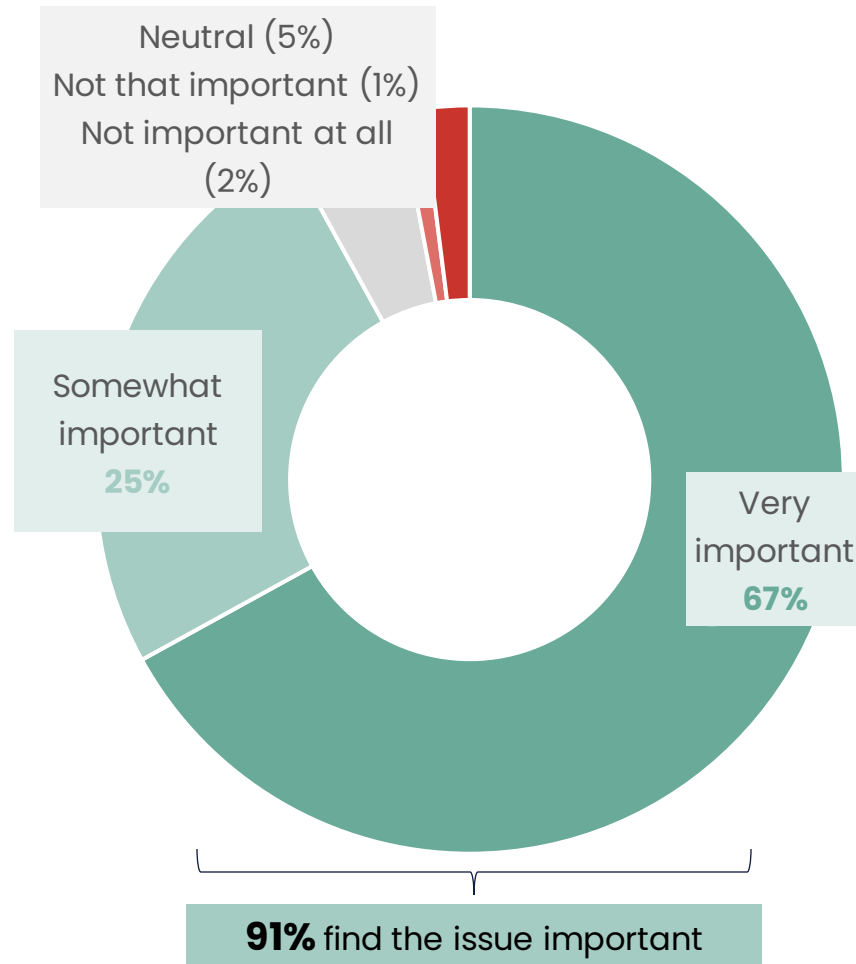


## The scale of the issue

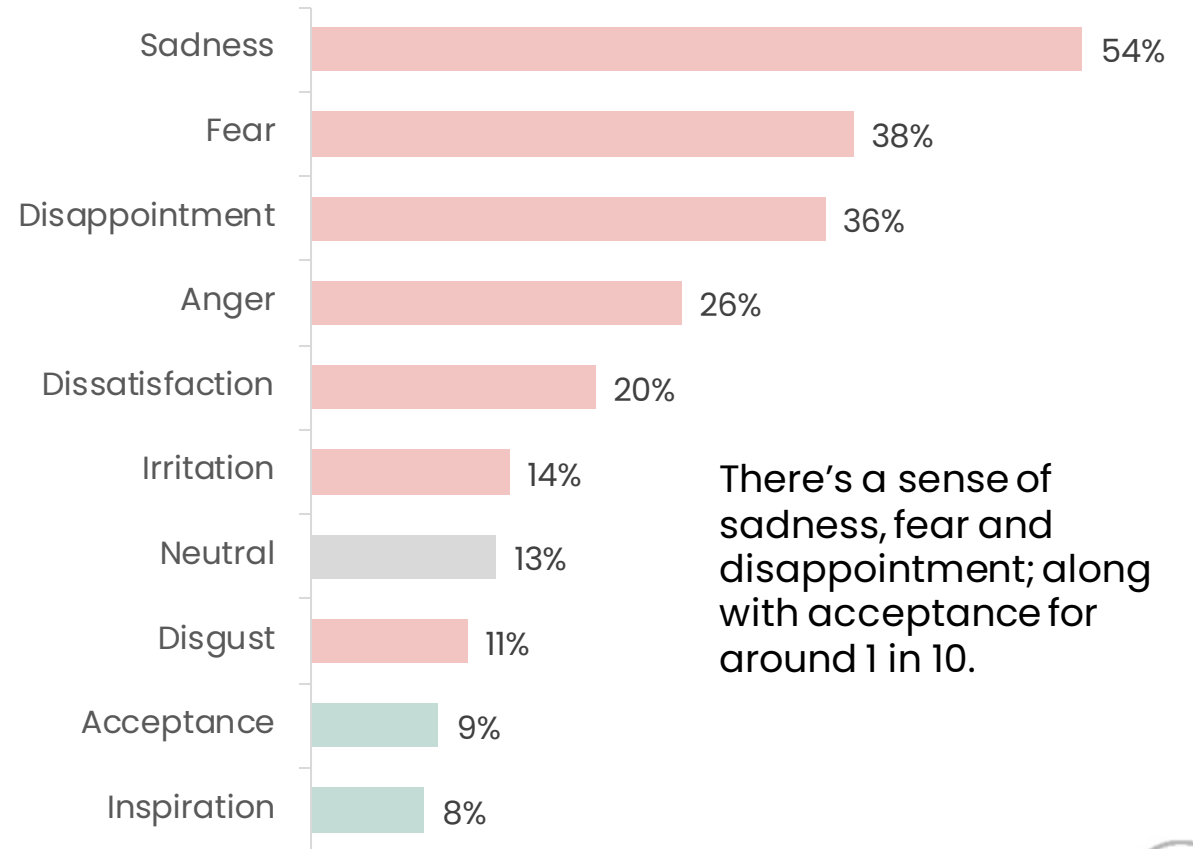
# The issue of climate change is hard to avoid in 2021

## – almost all are engaged to some degree

**Very few claim climate change is not important...**



**..and the issue evokes a lot of negative emotions**



There's a sense of sadness, fear and disappointment; along with acceptance for around 1 in 10.



# Awareness and concern is growing – particularly with increased presence in the media

**89%**

agree 'Climate change  
is an important issue that  
should be dealt with'

**64%**

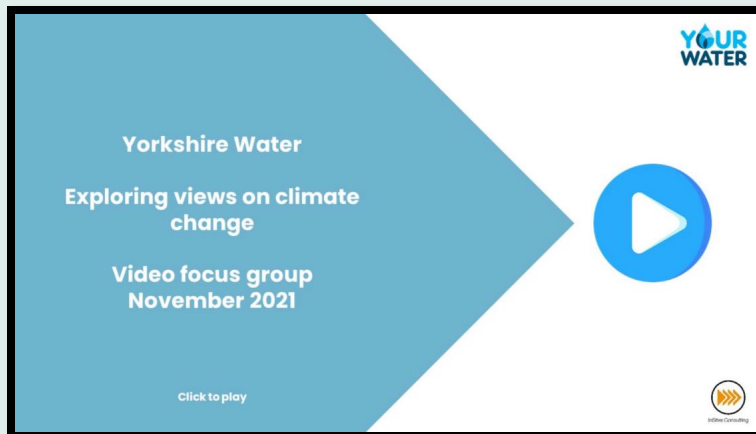
agree 'Climate change  
has become a bigger  
priority for me over  
the past year'

# The more & less engaged are very similar in actions but differ in attitude towards success

## Engaged

I'll do my bit for the greater good

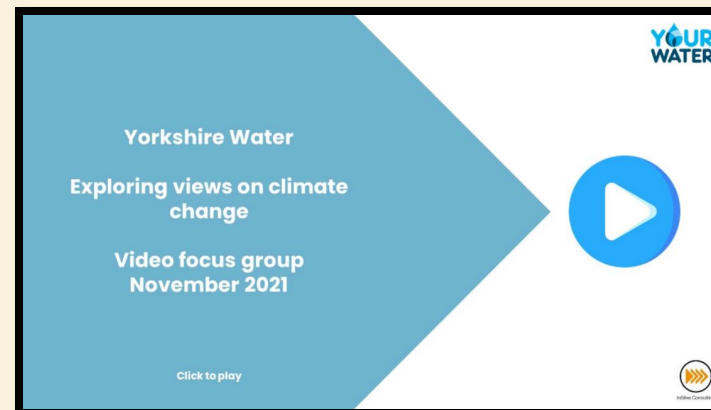
- This group are **actively engaged with climate change**
- **Highly aware** of the important issues
- Consider themselves to be **involved in the fight** to save our planet and the future for our children and grandchildren
- Some call themselves '**eco warriors**'
- Take active steps to reduce their carbon footprint and support others in their actions as well
- **Have hope** and believe that their efforts will make a difference and that together we can succeed.



## Less engaged

I can't really make a difference

- **Will my efforts do anything at all?**
- This group also make concerted efforts to **try to help** with climate change
- They also can see and **recognise the seriousness** of the situation facing us all
- Their attitude has changed recently from 'it doesn't affect me' to '**it will affect me and my future**'
- However, they are **less positive** about how effective their efforts are and feel more '**hopeless**' about the future
- **They are much more easily 'put off' and demotivated** by negativity surrounding the climate change efforts and are more ready to point the finger of **blame on others** (especially those in positions of responsibility like the Local Authorities and Governments) rather than consider themselves to be ultimately responsible



## Not engaged

Not my problem

- Just 3% of the Your Water community openly admitted to considering Climate change as unimportant. This group is likely larger in general population, but will be growing smaller over time as climate change is increasingly present in mainstream news.
- To those more engaged, there's a sense this group 'will never change' and there is clear negativity towards them.
- **Influencing this group will be a real challenge, so YW efforts are best focused on those already engaged to some extent.**



The background image shows a scenic view of a river, likely the River Aire in Leeds. A large stone arch bridge spans the river, with a train crossing it. The riverbank is lined with lush green trees on the left and residential houses on the right. In the foreground, several small wooden rowing boats are moored along the right bank. The sky is overcast with soft, grey clouds.

## What climate change means – now and in the future

# Regardless of engagement level, definitions of climate change are consistent

## The key components are weather related

- More **severe weather patterns** including
  - obvious changes
  - wild fires,
  - hurricanes,
  - flooding
  - storms
  - and other natural disasters
- More **extreme** (and dangerous) **temperatures** all over the world
  - Hotter summers
  - Colder/freezing winters
  - Less change between the seasons
- **Melting ice caps** is the '**scary**' part and the rate at which it is melting is **frightening**
  - This effect is described as '**irreversible**' and very '**visible**'
- **In the UK, effects are not thought to (currently) be as bad as other areas in the world**

## The recent international COP26 conference has hit the headlines

- Constant news coverage has clearly **increased awareness** of the climate change issues
- Along with prominence of Prince William's Earthshot Prize, the media coverage keeps the issues that 'face us all' in the **forefront of people's minds** (including those who are less engaged).

## Great sadness and sympathy are felt for those who suffer directly

- Many feel **relatively untouched** by the 'real' impact that is seen regularly on news channels and social media reporting the **devastation affecting people of other countries** (for example, India temps reaching 50 degrees, and Australians watching their homes and natural environments being destroyed by uncontrollable wild fires).



### Key insight

It's the tangible changes that spring to mind and are having the biggest impact on awareness, but alongside this, there's still a sense for some that it's a problem '*elsewhere*', so it's important to tie changes/efforts back to Yorkshire where relevant to YW actions.



# Major contributors are recognised by everyone – some of these are in home and within individuals' control



## Plastic (bags and packaging mostly)

- There's widespread awareness here – for some, just at a top level that plastic = bad; but the most engaged are conscious of plastic remnants **clogging up the seas and rivers**, as a big problem that has a negative impact on us all
- Making small charges for using plastic bags to **reduce usage in supermarket shops** is seen as a very positive and effective way to help stop the 'unnecessary' use of plastic bags in this way amongst millions
- The over 70s 'remember' brown paper bags to bring home their food shopping in (affectionately) – for this group, plastic is very much a modern problem we've caused ourselves.



## Eating too much meat

- There is clearly a **growing trend in vegetarianism and veganism** (amongst many dietary trends) especially in younger generations (U35)
- Older people are self-confessed as tougher to change habits; but they try to eat less meat, starting with perhaps a few days each week
- The aim is to **reduce the gasses** (methane) given off by farmed animals as well as become more healthy
- This is an **'everyday' way that an individual and his/her family can 'make a difference'** and feel good about doing it
  - There is a generational connect with younger people (including 4 year old grandchildren) guiding their elders in best practices
  - Interestingly, there is an overall perception that the younger generation ('who have more to lose') are more aware, active and invested in this climate change movement.

## What we know...



According to our research, reducing (single-use) plastic is a key area for consumers, with one in three European consumers (33%) indicating it as a core action point in the fight for climate change. 69% avoid using single-use plastics, which has increased in comparison to pre-COVID (62%). 71% refuse plastic shopping bags, again something that is significantly higher than pre-COVID (64%). And 51% of consumers indicate they no longer buy water in plastic bottles.

Since 1950, the world has created 6.3 billion tons of plastic waste, 91% of which has never been recycled. The coronavirus pandemic has sparked a rush for plastic. During lockdown, many chains banned the use of reusable cups for safety reasons, while disposable face masks have been mandatory in many places. From Wuhan to New York, the demand for face shields, gloves, takeaway food containers and bubble wrap for online shopping has surged. With major consequences for the environment (Reuters, 2020).

# Other contributors are seen as a bigger issue individuals have limited impact on



## Burning fossil fuels

- This is accepted as one of the **main sources of CO2 emissions** across the world which needs to stop in order for us (collectively) to reduce the predicted global temperature rise to just 1.5 degrees
- NB alternative fuels are not clearly understood yet (leading to hesitancy especially amongst less engaged)



## Car and plane fumes

- Again, these fuel emissions (especially diesel) are known to be **a major threat** to any targets set (and net zero ideologies)
- This is one of the areas where **people on an individual level feel they can have an impact** by using their own cars less (or for the more engaged people, only if absolutely necessary)... but costs can be prohibitive



## Being wasteful with energy resources

- Keeping heating (especially in homes) and electricity (oil or gas) usage down is another widely accepted major cause of heating the environment and **an area where people can see themselves making a difference.**

“

*I am still determined to play my part, whilst I possibly can”*

Less engaged

## Key insight

Whilst reducing energy usage is spontaneously tied to climate impact, reducing water usage isn't top of mind in the same way. Education is needed before customers can be expected to fully understand how they can contribute to YW's mitigation efforts via water use.





# Even if they haven't experienced the impact directly, most express concern over the future

And the main concern is where we're heading – there's a consensus that these extremes will continue, increasing in frequency and severity

87%

concerned about how climate change could affect me, my area, wildlife, & other people and places

74%

agree climate change will personally affect me in my lifetime

39%

have been affected by extreme weather

**People feel that we are relatively safe in the UK but it will only get worse unless we all make big changes.... globally**

- Without change (or perhaps even with change) the **alterations in weather are expected to continue and get worse**
  - Activists' fears that there will be more 'talk' (Blah, blah, blah..) and still little or no action resonates with participants
  - There is hope that COP26 will be different to the other World Climate Change conferences but also an expectation that it will be more of the same, resulting in not enough action to slow the damaging effects of further rises in temperature of our atmosphere.

*"The biggest impact will be for future generations."*  
**Less engaged**



# Changes can still be felt in Yorkshire too, but less directly

**People have noticed smaller changes locally in recent years and are unhappy about the direction we are heading in**

- **Plants die** easily in the garden if you cannot water them enough during the hot periods and heat waves
- Rain fall is 'biblical' and **floods** local areas taking days to recover sometimes
- Weather patterns are 'not normal' with **frosts later** and later in the year and temperatures too warm in February, 'confusing the plants'; less differentiation between seasons is evident
- Flowering patterns are changing and the **impact on the 'natural rhythm'** is clear to see
- Farming is known to be affected – both livestock and arable farming.

**People are definitely concerned and want to help protect their children and grandchildren's futures.**

## Key insight

Whilst these local changes are not generally life-threatening, it is acknowledged that the younger generations will feel the brunt of it and will be taking the lead in addressing it. Making change 'for future generations' could be a good angle to engage our older customers who don't expect significant change in their lifetime.

“

*What's happening to the weather?”*

Engaged







“

I think it has impacted me to some extent but not in a major way as it is for some people in other countries. I have struggled a bit with the heat and have been very aware of the effects that heat can have on my dog but at least we do have a roof over our heads and food to eat, etc. We have not lost everything as some people have due to fires, floods, etc. In the future, I suspect that we will have more extreme conditions throughout the year and will just have to get used to it.”

“

I can see a difference, but I don't fully think our generation will suffer or see major differences in my lifetime as much as my children and grandchildren if we don't change things now.”



# The climate change journey



# Increased awareness of climate change has been gradual

## The focus of many years of awareness is now clear

- Many Yorkshire Water customers relate stories of when they were 'young' and compare their knowledge and awareness to now (November 2021). They have learned a lot and feel knowledgeable enough to know this is a real threat to life on earth. **No-one underestimates this challenge (that we all face together)**
- There is a general feeling that **time is of the essence** and that if we do not make changes immediately, it may well be 'too late' for future generations and the human species as a whole.
- Some can remember times when the importance of the 'crisis' hit them (e.g. **hose pipe ban explanations** from parents whilst still a child; or becoming overwhelmed at the realisation the **John Lennon's Imagine** held so much truth; or watching **Live Aid** and realising that the dreadful drought, famine and poverty was 'our fault' and that we can do something about it; others that they have been 'told' about it (via many different sources) for many, many years
- More recently, primary contributors to information impact are **TV documentaries** such as David Attenborough's Blue Planet and the constant 'scare mongering' of the news (24/7)
  - Attenborough is seen as **unbiased, and data focused** so easy to believe and imbibe. **Strong images of damage** done also last with people (who care and do not want to ignore what is happening anymore).

“

*I think it (Live Aid) was a very good foundation on which to build a greater awareness of climate change and what the rest of us were doing to cause that.”*

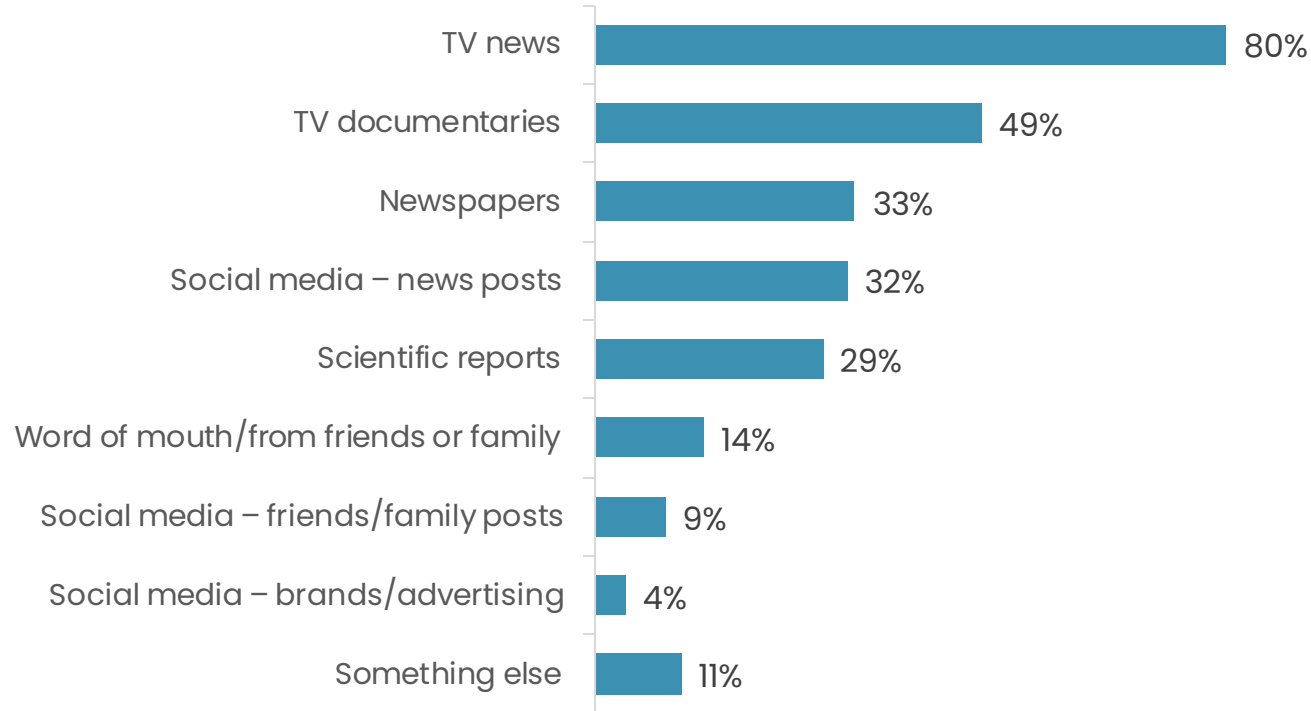
Less engaged

## Key insight

For most people there isn't a single 'trigger' to pay attention... it's a gradual increase in awareness and a build-up of tangible evidence of the impact. Whilst YW can add to the information/evidence people are exposed to, there's no quick fix to reaching the unengaged.



# The media has been a key source of information – although it is treated with some scepticism



## Key insight

Whilst social media may not be acknowledged as a key source of information, reaching people through channels they interact with most often is likely to have a bigger, gradual impact than people give it credit for. Social media is a good channel to use as an 'always on' source of info for YW customers – but be aware this will be reaching those already more engaged, rather than broadening reach.

### The Attenborough effect

Sir David Attenborough, aged 95, is famous for his documentaries. The airing of his 'Blue Planet' series brought a noticeable uplift in community awareness and engagement with plastic reduction and biodiversity protection. Hitwise, a company that measures online behavior, stated that internet searches for 'plastic recycling' rose by 55% after the last 'Blue Planet' episode had aired. Equally, organizations like the Marine Conservation Society, WWF and Plastic Oceans International saw huge spikes in website visitors which allowed them to use the messages from the series to tell their own stories to this broader audience.



**BBC**  
**NEWS**

TV documentaries and news have been key influencers.



# There's a sense media delivers the 'doom and gloom'; whereas positive stories may be more motivating

For the 'Engaged' the scare mongering attempt by the media should be ignored

**Engaged participants do not trust the media and rely on their independent sources for information about climate change**

This is why they are 'stronger' in their own opinions that their actions make a difference and are useful. They are, generally sceptical about media sources and have 'more faith' in their own actions to make a real impact on climate change

*"They make it worse than it is... and should be made to tell the truth."*

**Less engaged**

*"I'd like to hear more positive stories than negative ones."*

**Less engaged**

## Key insight

The media can have a substantial impact on people's behaviour, and attitudes towards climate change – but not always in a good way.

Rather than stressing only the problems/risks which adds to the sense of negativity, Yorkshire Water should look to engage customers with the positive steps being taken, and how this impacts their local area to help boost engagement.

For the 'Less Engaged' the negative impact of media has been significant

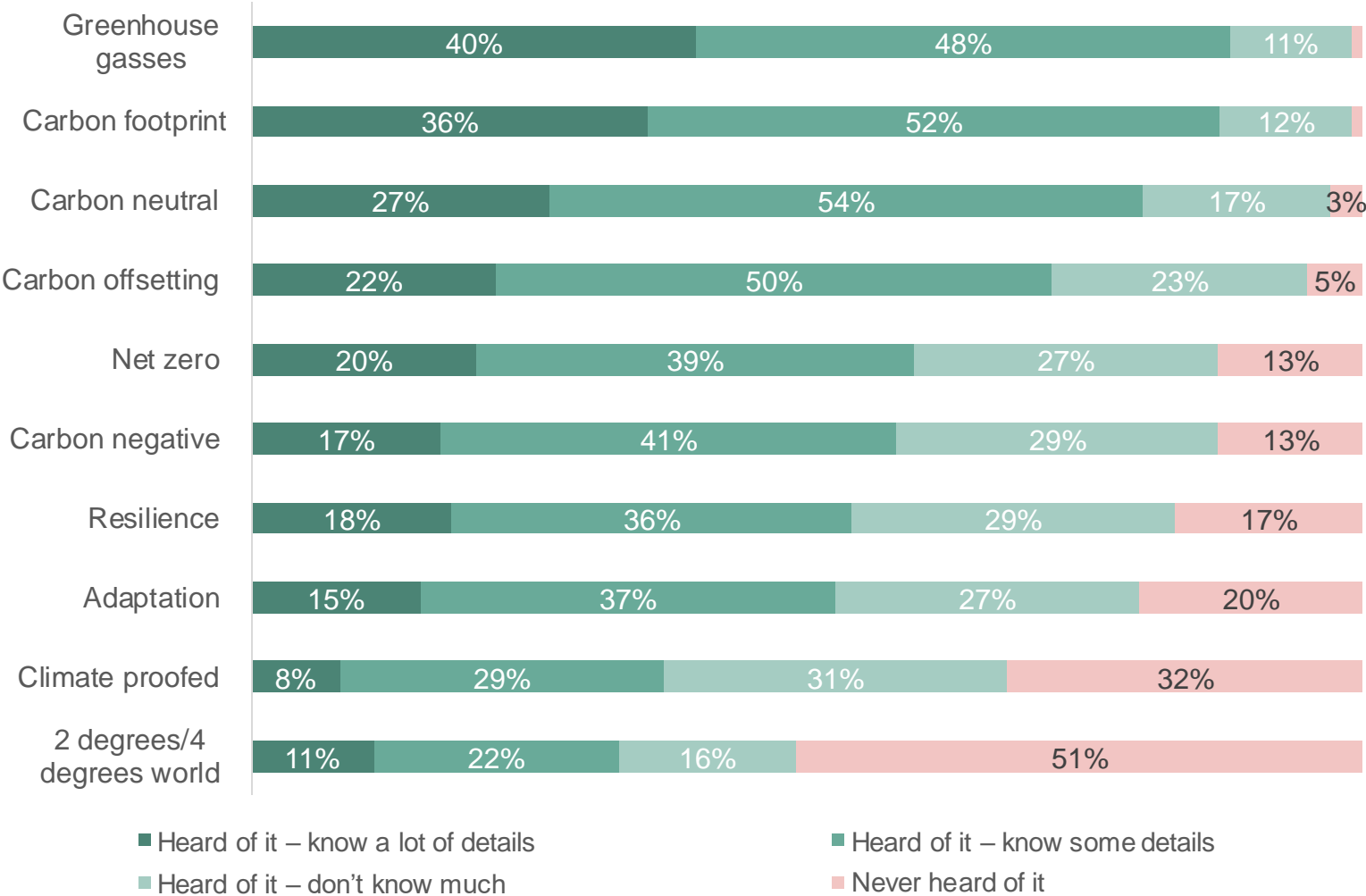
**People who need more encouragement to engage and feel positive are easily demotivated by negative news**

'News' is a powerful influencer for these people. They are wary of, but still 'listen' to the news – so it remains a **more powerful source** of information (on climate change) than individual companies

It is seen as '**impartial**' and **non-profit making** (unlike companies like Yorkshire Water), so has a strong influence. When the 'stories' are negative the impact is severe on the 'less engaged' participants, who will give up hope much more easily than 'Engaged' participants. They need more reassurance and encouragement (but are listening and want to hear positive news)



# Whilst awareness is rising, when it comes down to the specifics, customers aren't always familiar with the terms





# There's a lot of noise about 'net zero', but it's not always cutting through



**Just 20% feel confident in the details of 'net zero'**

**A lot admit that they don't know what the term means, or they have a vague awareness that it's about the levels of carbon...**

*"Not sure but I think it means overall, there's no impact on the environment."*

**Some recognise it's about achieving a balance, or offsetting carbon emissions...**

*"It's the balance of greenhouses gasses. What we produce and what we take away. I guess we aim for net zero - do we?"*

**And some believe it's about cutting carbon emissions / zero completely...**

*"Zero carbon is released into the atmosphere."*

**But whilst there's a lot of noise around net-zero, messages are struggling cut through with customers.**

**A few brands/companies stand out for talking about being / aiming to be net zero...**

- Telecoms agencies such as BT, Sky
- Utilities such as British Gas, Yorkshire Water, Octopus Energy, Shell
- Retailers such as Amazon, Sainsbury's, M&S, John Lewis
- Others such as Brewdog, BP



**But many customers can't name any good examples when pressed or feels as though a lot of empty promises are made .**

## Key insight

There's some scepticism of actually achieving net zero. As this is central to Yorkshire Water's carbon strategy, it's important any comms about it are sincere and provide the evidence behind it to build trust from customers.



“

*There are lots of fine words but at best only token actions – I cannot think of any companies that stand out.”*





## Changes in behaviour

# Most people have made conscious changes in their behaviour over the past decade, and want to make more

Customers who are engaged with climate change to any degree, are actively trying to make some changes, even if small ones, to play their part. Spontaneous mentions include...



## In the home...

- Almost everyone spoke to **recycles**
  - This seems to be the **easiest one to do** and at least makes people feel that they are bothering
  - Not everyone (especially Less Engaged) however, feel this makes a difference; as different Local Authorities do different 'things' and some feel 'it all ends up in landfill anyway'
  - Some **re-use** items if possible, and increasingly so



## Shopping / consuming

- **Shopping habits** have changed since lockdown – there's greater support for local producers and '**buy local**' now
  - During lockdown this was 'forced' upon some as they were unable to 'get a delivery slot' from supermarkets, so looked elsewhere
  - This reduces 'food miles' and for many is worth the sometimes higher costs (as quality of produce is thought to be better)
  - Some also put more consideration into whether they really 'need' an item, or just 'want' it
- Many also report **changing their diets** to reduce meat consumption (or remove it altogether)
  - Some have starting using allotments and gardens to grow their own veg etc, to be sustainable



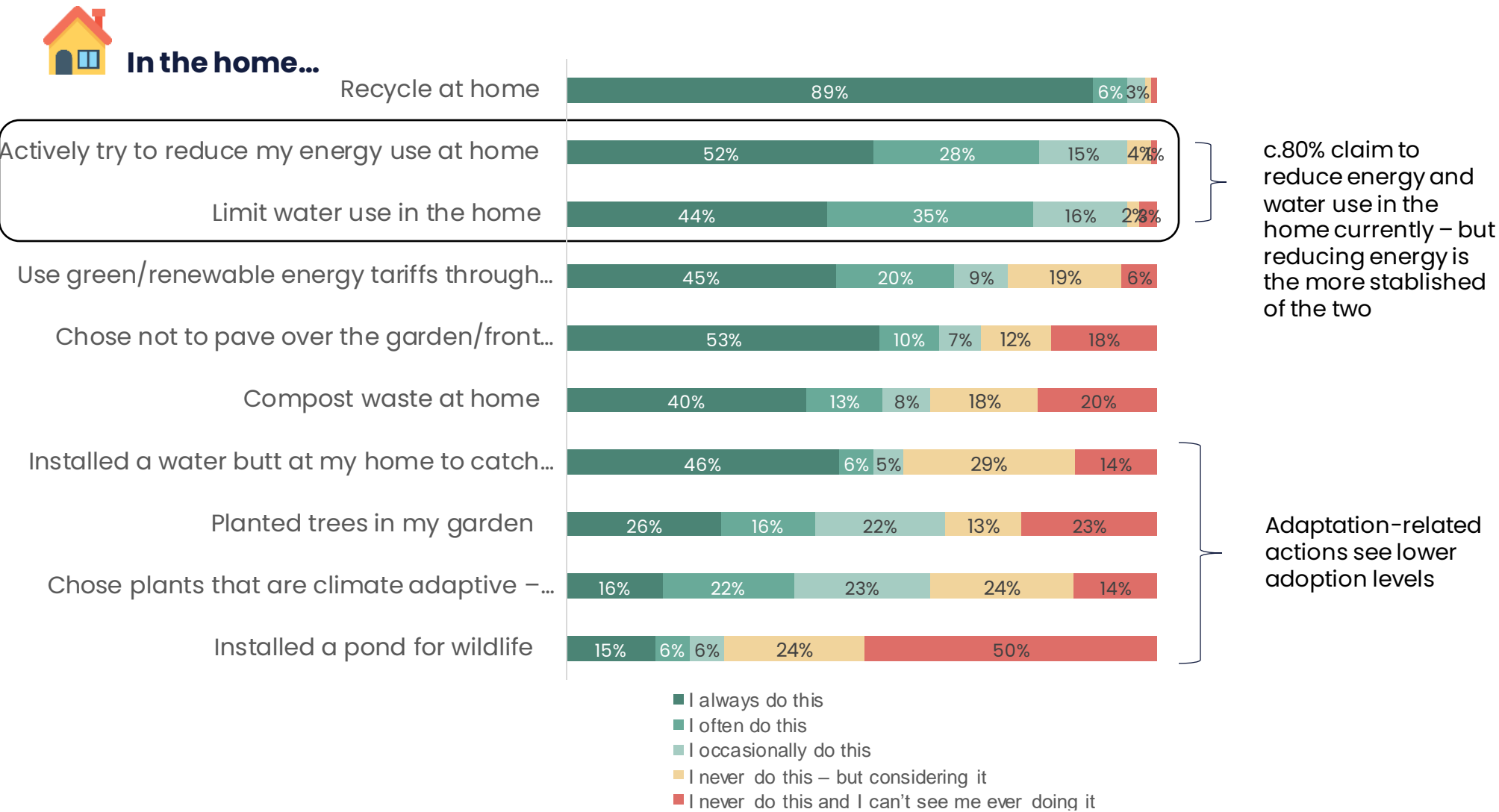
## Travel / Out of the home

- Many (especially Engaged participants) **use their cars less** (if possible)
  - Or car share for regular journeys like school runs and work commutes.
  - Some have considered buying an **electric car**, or **hybrid**
- Many also **work from home**
  - Initiated because of Covid and lockdowns, but now continued as a climate change consideration e.g. more Zoom/online meetings rather than face to face and restricted commutes





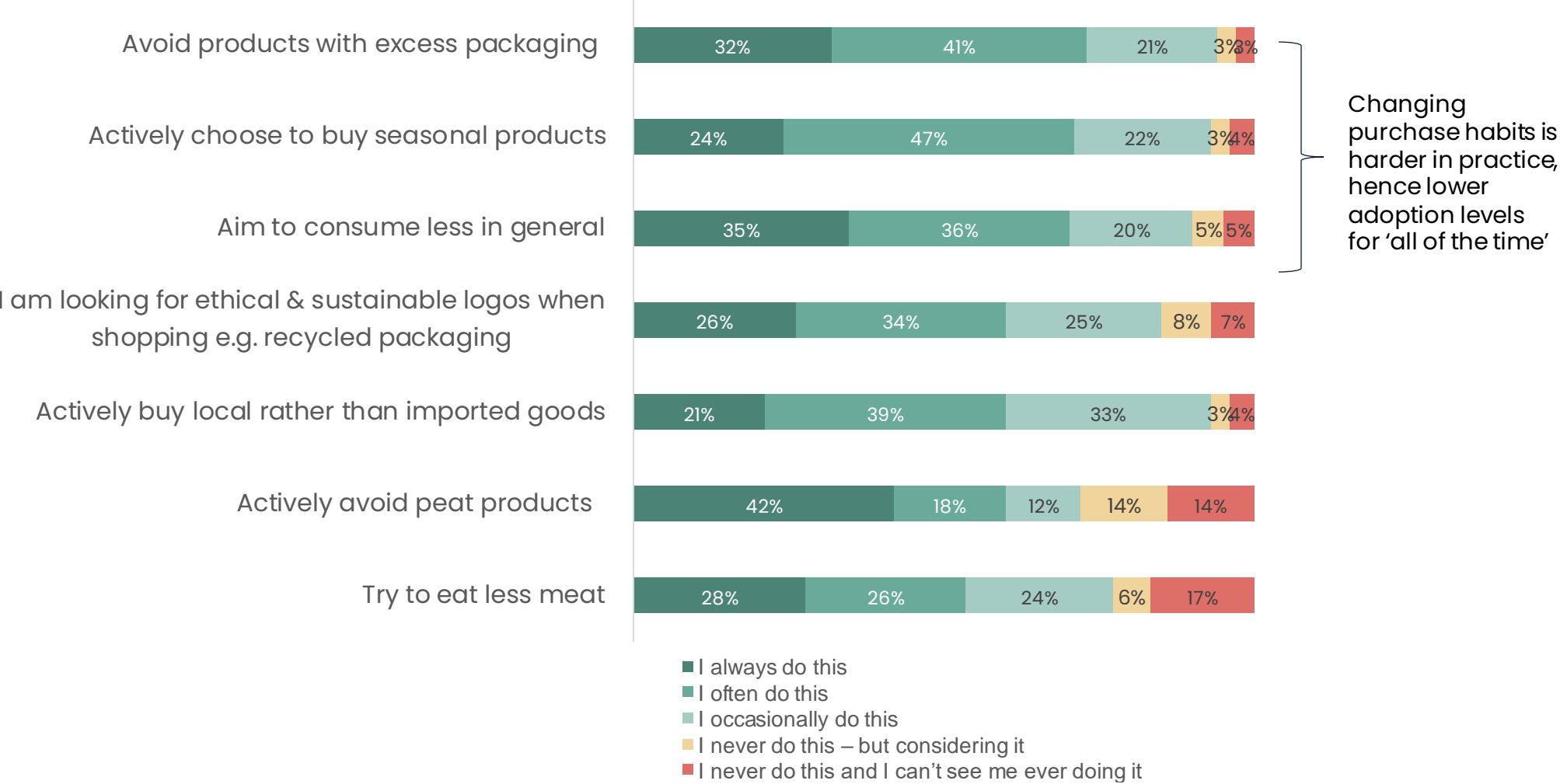
# Most changes in the home relate to recycling and reducing



# Changes in shopping and consuming are about making more considered purchases, rather than cutting out completely



## Shopping / consuming



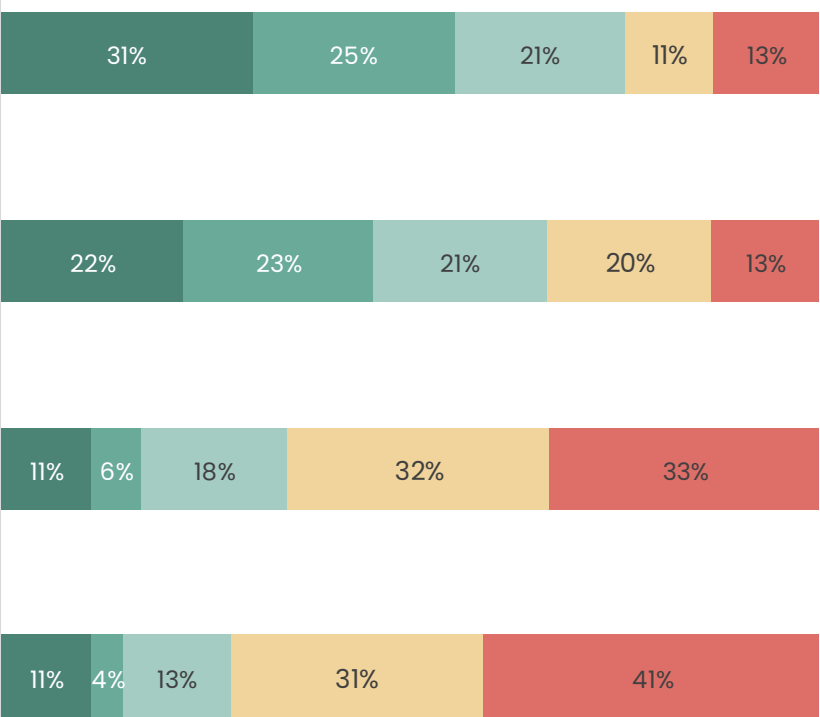


# Out of the home, many are gradually choosing to use more sustainable forms of transport



## Travel / Out of the home

- Choose to holiday in places I can reach by train/car/bus (to avoid flying)
- Use a more sustainable form of transport instead of a fossil fuel car (electric vehicle, bicycle, public transport)
- Volunteer for a community or environmental organisation
- Pay to offset carbon impact of flights



Similarly to purchase habits, these areas are hard to change altogether... hence less than 1 in 3 claim to do this 'all of the time'

- I always do this
- I often do this
- I occasionally do this
- I never do this – but considering it
- I never do this and I can't see me ever doing it



“

*“It’s so hard to be just one person. I know whatever we do makes little difference, but when we have such large nations being huge pollutants, what difference can we make? Even if we try.”*

”

**Despite these changes, some question how much of a difference individual behaviour can really have**

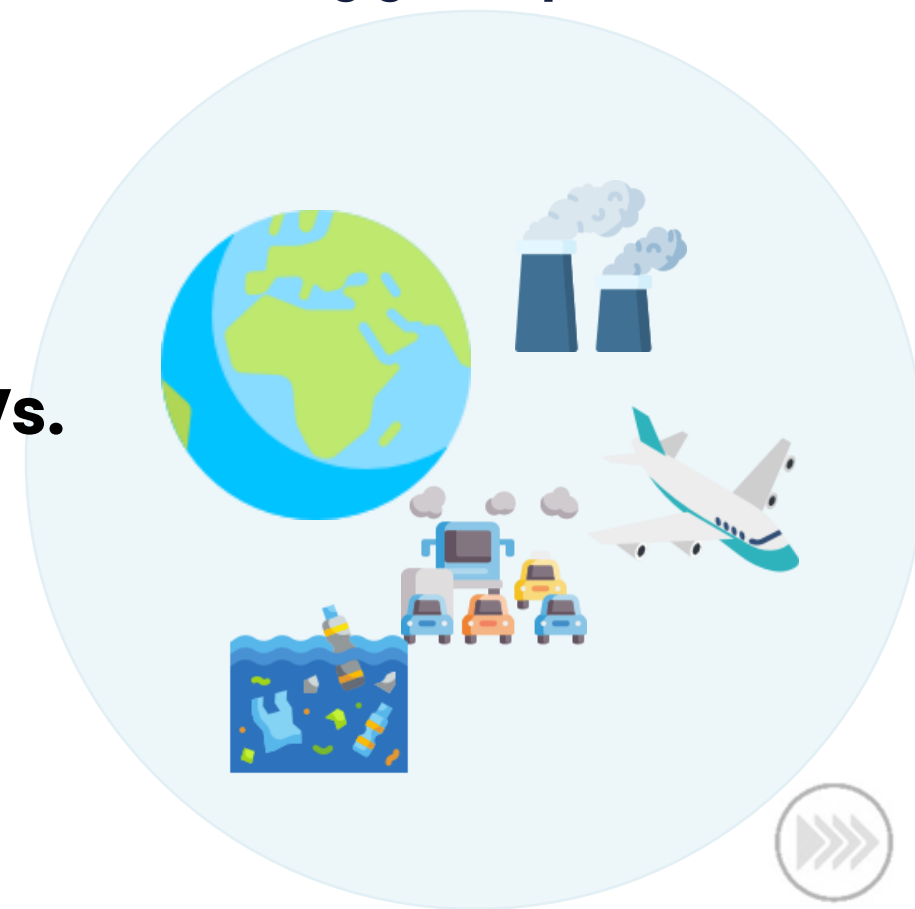
YOUR  
WATER

Me



**Vs.**

The big global polluters



InSites Consulting



# Inaction from others contributes to a sense of frustration

**Big industries (and companies) are thought to be lagging behind, and not pulling their weight in driving change.**

- Not adhering to legislation as they feel their views and motivations (financial etc) are more important than the global challenge facing us at present
- Key offenders here include fossil fuel, plastics and chemical industries, car manufacturing, international travel etc
- The automotive industry and electric cars is just one example top of mind for customers – a clear example where progress is evident, but not perceived good enough yet to support mass adoption
  - The **batteries** are not legitimate when it comes to climate control issues – they are not renewable
  - The **cost** is too much for most people (even if they want to change)
  - There are **not enough electrical charging points** in the UK to make it feasible
  - Charged batteries **don't last long enough** for 'normal' journeys

**These challenges are seen as part of the bigger picture and the responsibility of the government rather than individuals or companies – but seeing this inactivity undermines individual efforts.**

“

*Technology is catching up... but we are not there yet.”*

**Less engaged**

## Key insight

Although Yorkshire Water can't change these issues, showing that you're pushing for change can help build trust with customers – e.g. lobbying on relevant issues, and pushing for change through authorities & regulators.

# There's also a so-called 'say-do' gap; intentions for change are high, but behaviour is low

77%

Of YW customers spoken to claim to *consider the potential environmental impact of their actions when making decisions – even if this might cost more.*

This echo's (albeit more strongly) what we've seen in wider research, showing that more than 57% of European consumers wish to change their habits, in order to have a positive impact on the environment, and the number is even higher among women (64% vs 57%) and NextGen (= Gen Z and Millennials) (63% vs 58%)\*.

But adopting new habits does not happen overnight. Many aspects of our lives run on autopilot, including most decisions we take daily – for example, a visit to the grocery store where you are likely to stock up on recurrent items without considering their (sustainable) alternatives. The same is true for energy and water use in home... changing habits will take time and practice.

## The things holding people back...

1. AFFORDABILITY

3. PERFORMANCE

2. ACCESSIBILITY

4. CONVENIENCE

“It needs to be easy for people or they just won't do it.”  
Engaged

### Key insight

To really drive change in customers when it comes to water usage and their own adaptation/mitigation behaviours, it's important to address these barriers – demonstrate the financial impact of cutting back and the convenience of water-saving solutions and how these can benefit.

\*Read more in the Conscious Consumptions report  
[InSites Consulting – Conscious Consumptions, 2020](#)



**Who is responsible?**



# As seen in the differences in individual behaviour change, some think it's a challenge bigger than them

**91%**

agree 'Brands/companies  
have a responsibility  
to take care of the planet'

**91%**

agree 'Governments have a responsibility  
to prepare for and adapt to climate  
change and should take the lead in  
safeguarding and promoting sustainability'

# Mitigation & adaptation are both important – there is clearly no point in having one without the other

## Mitigation

“Avoiding or reducing emissions of heat trapping greenhouse gases being released into atmosphere”

### Some examples...

Reducing fuel use in transport

Capturing emissions from processes by being more efficient

Generate renewable heat and power

Planting trees to store carbon (Also known as off setting)



## Adaptation

“The process of adjusting to current or expected climate change and its effects”

### Some examples...

Installing flood defences

Correct planning of infrastructure to avoid flooding

Managing resources to ensure supply is not interrupted during droughts

Planting trees to support natural flood defences.



## Both terms (mitigation and adaptation) are clearly understood in this context

- Participants can differentiate between these terms without any difficulty and summarise them as one describing ‘preventative’ measures; the other as how we will ‘deal’ with, or protect against, the changes
- They are seen as interlinked
- At first sight, as we presented them, these terms are presumed to be **primarily the responsibility of larger corporations and governments and regulators** who make the legislation and then ‘force’ the relevant companies to stick to them
- Yorkshire Water is seen to have responsibility across both areas
- At a general level however, the specific actions are **not areas that individuals feel they are involved with** or can impact in any meaningful way.

Prevent

Vs.

Protect

## Key insight

Mitigation & adaptation aren’t necessarily terms we should expect customers to engage with – they just need to know the tangible examples of changes that a) they could make themselves, and b) what Yorkshire water are doing, or are working to influence.



However when reflected on, most agree on a more holistic approach that ‘we are all involved together’.





# But ultimately, there's agreement it's a joint effort – the collective responsibility is all of ours

**Engaged** customers clearly see the responsibilities lying with us all...

- Customers
- Yorkshire Water
- Stakeholders/farmers
- Local authorities
- Government
- Regulators

Although it's a shared responsibility, there is more room for individual customers to get involved with **Mitigation** whilst companies, governments, groups etc are more prominent in both, and especially **Adaptation**.

There is a tendency for **Less Engaged** customers to remove themselves from the responsibility and leave it more to others

- Want YW to make investments (without calling on customers to pay more) in order to provide their services effectively and efficiently
- Tend to limit their definition of YW's 'responsibility' to providing clean water, reducing water wastage and removing waste water. To this extent, they would prefer YW to 'stick to their bit' and focus their efforts where it is needed most i.e. fixing leaks

**However, on further discussion, they to admit that it is crucial that we all work together and would welcome guidance on what they can do**

“

*We all have a part to play here.”*

Engaged

“

*They (YW) must be effective in both areas... this is a big picture.”*

Engaged

## Key insight

Those less engaged will need more encouragement, and time, to see the role they can play. Using positive messages and evidence based plans will help motivate this group; whereas those already engaged will be an easier win.



# The role of Yorkshire Water



# At a top level, there's limited awareness of the steps Yorkshire Water are already taking to achieve their goals

**Most aren't aware of anything that Yorkshire Water are doing specifically, but those who mention something say...**

- Fixing leaks
- Flood defence
- Encouraging/educating customers on water saving
- Planting trees
- Maintaining environmental conditions (water quality).

## Key insight

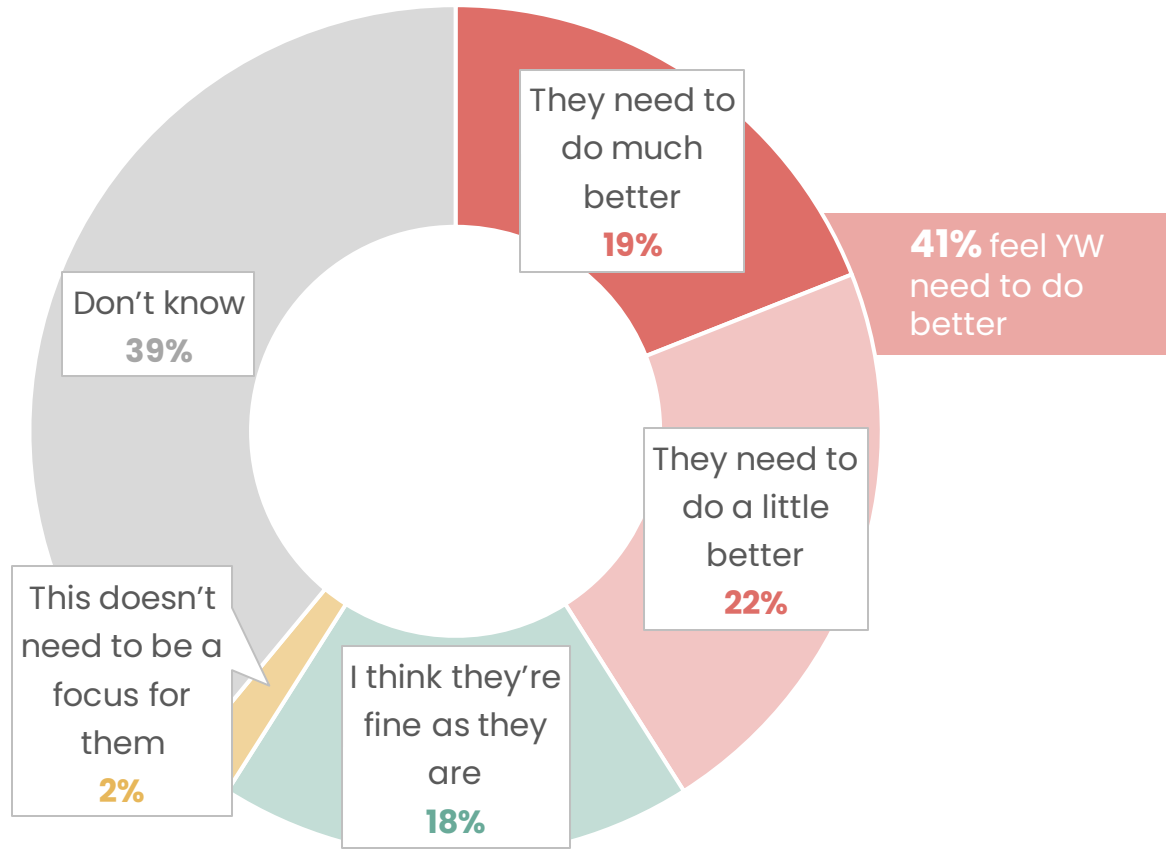
There's probably also an element of customers 'taking a guess' at what companies are doing, because a lot of efforts are seen across multiple companies/industries (e.g. introducing hybrid/electric vehicles), or just using common sense (e.g. fixing network leaks). Giving examples specific to the Yorkshire region will help customers relate the efforts being made to them.

## Awareness of steps Yorkshire Water taking to achieve environmental goals (% Aware)

Supporting customers to reduce water usage where they can	58%
Restoring catchments and peat bogs to their natural state	32%
Investing in natural flood management schemes – e.g. planting trees at Gorpsey reservoir	31%
Using our land for renewable energy, which can power our operations	23%
Have around 250 leakage inspectors actively looking for leaks every day and night to hit the water industry target of reducing leakage by 50% by 2050	20%
Working with the Environment Agency to trial lowering some of our reservoirs above Hebden Bridge to reduce the risk of flooding.	20%
Yorkshire Water are aiming to achieve net zero by 2030. Emissions have already been reduced by 80% to achieve this	15%
Started to test and introduce alternative fuel vehicles and have the industry's first hydrogen powered large goods vehicle (LGV)	13%
Working on partnership scheme to reduce surface water flood risk e.g. we are working on a 'Living with Water' scheme in Hull.	13%
Supporting Scarborough Council in building a sea wall at Runswick Bay	9%
None of these	25%



# As a result, general consensus is that more can be done, particularly on the basics like reducing leaks



**It's hard for customers to make comparison and know what good looks like on these matters, as they're not experts.**

As an example, some assumed the net zero by 2030 target is just following the regulators guidance – rather than that Yorkshire Water setting more ambitious goals.

*"I don't feel I have enough info on Yorkshire Water emissions sources and what they are doing currently to answer the question."*

*"I am not sure what measures are already in place. I don't fully understand the operating environment. I know that Yorkshire Water does a lot to encourage its customers to consume less, but not sure what they are doing at a corporate level."*

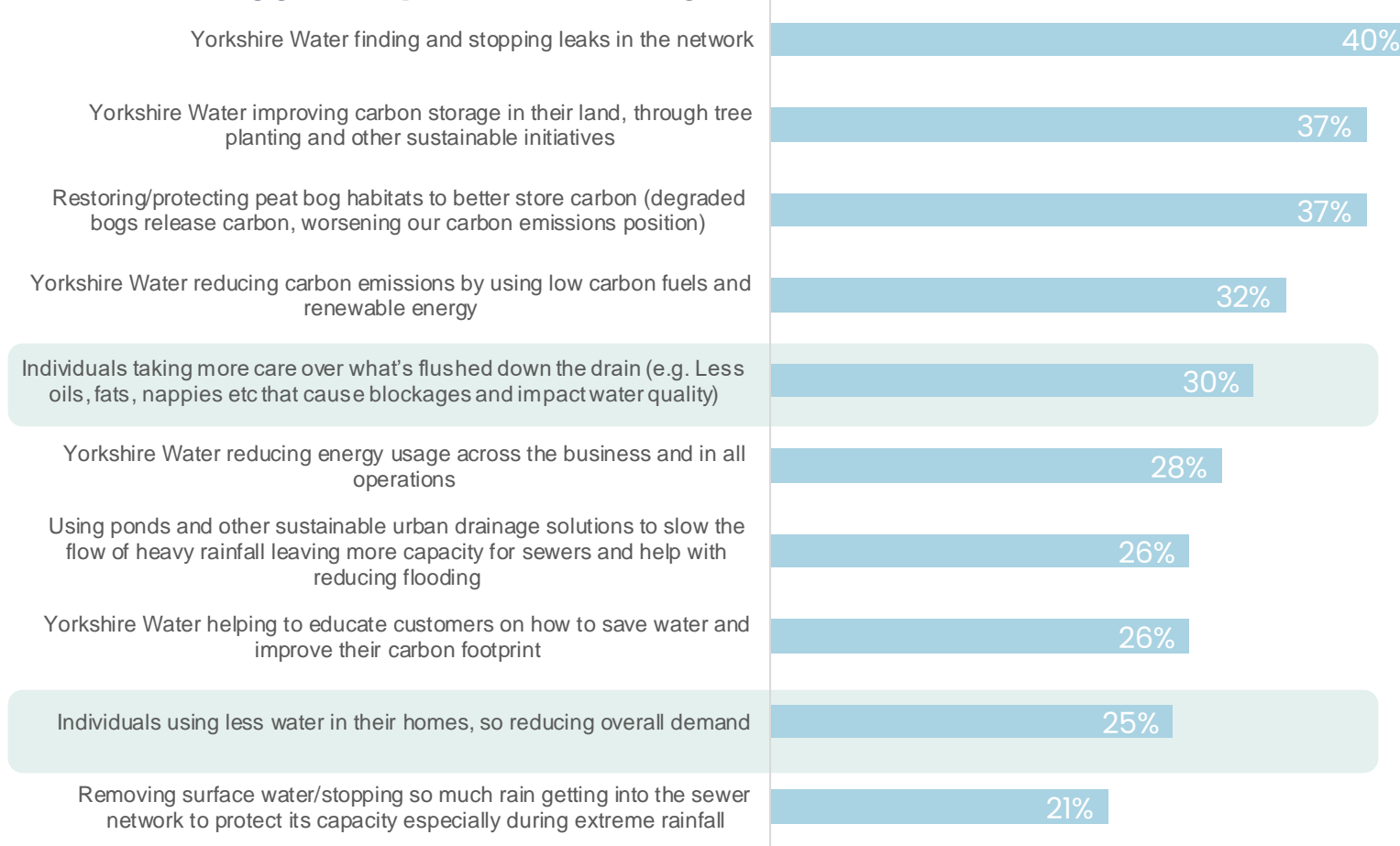
## Key insight

There's a limit to how much customers want, and need to know – but if we want them to judge Yorkshire Water fairly, then they need a benchmark. Give comparisons to other regions and/or organisations, and where YW are going above and beyond, shout louder about this to ensure your success is acknowledged by customers.



# When it comes to water-related impact though, there's a lack of awareness on the role customers can play

## Perceived biggest impact on reducing emissions...



■ % ranked in top 3 importance

### Key insight

Just under a third rank 'individual' actions as having the most impact, showing the lack of awareness customers have on the difference they can make. Feelings of 'I'm just one person, how much impact can I really have?' or 'Why should I make a change when X is still happening?' can be commonplace. Unfortunately, customers can be harsh critics, so seeing or being impacted by a leak, will leave a lasting impression that takes a lot to change.

If wanting to motivate customer behaviour change, it's essential that improvement on leaks is evidenced first, otherwise why should customers bother changing their own behaviour proactively.

“

*Everyone needs to do much better. Yorkshire Water might be doing well, I'm sure they are, but everyone needs to go above and beyond, and actually make a huge amount of difference.”*





# Yorkshire Water is a trusted and respected company

## It's acknowledged that providing clean water and dealing with wastewater is a big job

- Yorkshire Water (YW) customers are aware that they have **a lot of responsibility** as a company
- They also have to deal with the increase in extreme weather conditions (along with a rising population)
  - There is a clear feeling that **'we are in this together'**
  - YW have more droughts and drying reservoirs in the summer, heavy rainfall and floods in the winters, as well as an aging infrastructure and many blocked drains etc to manage – all with a limited workforce and finances
- Whilst they are also very aware that YW is a profit-making enterprise (not charity), they **still** feel **happy and proud** to have YW and be a customer

## Customers trust YW to make the best decisions on their behalf, using their skills, expertise, knowledge and experience

- YW is also trusted to take environmentally friendly and responsible decisions as a major company
- Previous communications and a positive and visible presence in and around the community, along with a user-friendly and well informed website contribute mostly to these beliefs
  - The fact that few mention needing to have any contact with YW, as the service has been as expected, also makes a difference: they are presumed to be doing a good job.

“

*I like their ethics; an open and trustworthy brand.”*

**Engaged**



### Key insight

This underlying trust means customers don't necessarily need all the details on strategy and what's being done – they expect Yorkshire Water to be doing their best, and will tend to judge this on things not going wrong (i.e. no/limited flooding/blockages/outages)

# The Carbon Reduction Strategy is thought good, but even for the engaged, is too corporate

## This level of strategy development is not thought relevant to the regular customer

- They really just want to keep YW in the back of their minds, receiving clean water as required and not worrying about waste water (or other) issues
- They want to continue trusting YW to 'sort out' any issues
- And to be responsible regarding corporate business decisions
- Customers anticipate that corporate level changes take time to achieve, and most have more immediate and personal issues to focus on

## But, whilst it may not interest everyone, it's thought this type of information should definitely be made available on the YW website for those who are interested

- Alongside targets, it's important to provide feedback on how you're doing against them, so customers can be reassured on progress being made.

### Key insight

Customers don't necessarily see the need to engage with the plan in this much detail, so it's hard for them to offer priorities... this is very much Yorkshire Water's role to decide and report back on achievements.



“ We don't need to know about all that... they need to decide. ”

# Areas of the plan customers can relate most to, are tangible changes they can see in their local area

## Spontaneously suggested things to focus on across both mitigation & adaptation include...

- **Fleet vehicles changing to electric** (which have been noticed by some already)
- **Tree planting** – to help with flooding and climate change
- **Wind turbines** to generate clean energy within their business structure
- Harness **hydro electric power** if possible
- Encourage more **volunteer groups** to 'get out and work with nature'
- **Sharing ideas** that customers can get involved with, like water butts for the garden

## Clear and honest communication of these initiatives is important...

### Promoting...

- Trust (between YW and its customers)
- Confidence in progress being made in their region
- Greater knowledge on the issues and ways individuals can make a difference
- A feeling of being involved
- Encouragement to do more/better
- Guidance and ideas

“

*They must be effective in both (mitigation & adaptation)... this is a big picture.”*

**Engaged**





# Most would be understanding if required to pay more to assist in YW's ability to manage their system effectively

## There's a sense that additional costs are inevitable to make significant changes

- It is clear to customers that vast investment is required to maintain and up-keep the drainage and pipe network as well as technical advances in sewage treatment etc.
- There is a perception that investment sooner will achieve better results in the long run and make potentially bigger savings overall (for the customer as well as company).

**If costs are passed on to the customer they'd expect transparency, and clear evidence of the contribution Yorkshire Water are making, and the benefits to them.**

### Key insight

It's important to remember customers spoken to were all engaged to some extent, and have had time to reflect on the issues – not all will be this understanding, and accepting of change where cost increases are involved.

Any cost implications being passed on to customers will need clear explanation as to why they're needed, and what the benefit will be to the individual. E.g. improving X in your local area.

*"A rise in bill can be justified, as long as they keep us informed, which they do."*

**Engaged**

*"We all know they have shareholders to answer to as well!"*

**Less engaged**

# Appendix



# Mitigation and Adaptation stim shown to focus groups

## Mitigation

*“Avoiding or reducing emissions of heat trapping greenhouse gases being released into atmosphere”*

### Some examples...

Reducing fuel use in transport

Capturing emissions from processes by being more efficient

Generate renewable heat and power

Planting trees to store carbon  
(Also known as off setting)



## Adaptation

*“The process of adjusting to current or expected climate change and its effects”*

### Some examples...

Installing flood defences

Correct planning of infrastructure to avoid flooding

Managing resources to ensure supply is not interrupted during droughts

Planting trees to support natural flood defences.



# YW Carbon reduction strategy

The journey towards net zero

## Our carbon reduction strategy

### Why is it important?

Climate change is increasingly impacting on our lives and our business:

1. Rainfall is getting heavier. This can overload the public sewer network and cause flooding and pollution
2. We expect 14-28% less rainfall during the summer months and 6-14% more rainfall during the winter months by the 2060s
3. We've seen a rise in average temperatures. The 21st Century has been warmer than the previous three centuries and 2019 was 1.7°C warmer than the long-term average.

### What are the key principles?

We will...

1. meet our customer promise in relation to carbon,
2. work in partnership with stakeholders to maximise value and benefits for everyone
3. report progress openly and transparently against our plan
4. act on data and science. If there are subsequent changes we will act on these to review strategy, plan and approach. This is particularly true in relation to the key risks and opportunities.

### The next 12 months

1. Align with core business decision making
2. Implement plan to deliver more on site renewables
3. Roll out fleet improvements
4. Commit resources to deliver on the plan
5. Speak to our customers about the plan
6. Continue to form strong partnerships to co-ordinate tackling climate change and reducing emissions
7. Produce a costed plan to 2030 to meet our ambitions

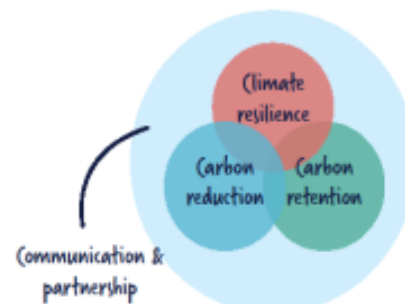
### Our approach will focus on 5 key areas



### Our decision making process hierarchy...



### Which brings everything together!



### How will we achieve this?

#### Decision making

1. Ensure low carbon is part of everyday business decision making
2. Form strong regional partnerships to reduce emissions across Yorkshire
3. Use data and science in decision making

#### Efficiency, renewables and green energy

1. Use zero carbon grid electricity
2. Replace grid gas with biomethane
3. Deploy up to 120 MW of solar by 2030
4. Deploy solutions to ensure we can maximise use of renewables, such as storage
5. Minimum of 30% of all electricity we use to come from on site renewables
6. Deliver an energy efficiency programme to reduce electricity use by 28% by 2030

#### Fuels and travel

1. All vans and cars will be electric by 2030
2. 50% of tankers and large vehicles will be zero emission by 2028
3. 100% reduction of on site liquid fuels by 2030

#### Technology and innovation

1. Target and support innovation and new technology to reduce emissions by 58t CO2e

#### Carbon retention and 'store the rest'

1. Deliver tree planting, peatland restoration and other initiatives to store up to 27tCO2e by 2030

#### Wider emissions from the building, maintenance and purchase of goods

1. Reduce capital emissions by 28% by 2025
2. Look towards long term targets to support UK target to be net zero by 2050
3. Target key areas such as chemicals and waste

### Risk and opportunity

#### Key risk

Emissions directly relating to the treatment of waste water, are called process emissions. Improving science and monitoring is likely to lead to higher reporting of these than previously thought. We have built an uplift into our strategy to mitigate this in line with what we know now. We will have to manage this proactively and review strategy accordingly.

#### Key opportunity

Implementing our solar programme provides multiple benefits to both emissions reduction, resilience of our assets and cost benefits.



## About your community

With over 2,000 members, Your Water is an online research resource giving you easy access to consumers

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

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

## Any questions?

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