

# United Utilities Customer Priorities

## Full Report

Prepared for United Utilities

Prepared by Impact

1<sup>st</sup> December 2021

Project No: 1266

# Contents



- 1- Objectives & Engagement Approach
- 2- Global Context & Customer Experience of the Engagement
- 3 - Overview of Findings
- 4- Satisfaction with United Utilities
- 5- Max-Diff Outcomes Prioritisation Results
- 6- Service Ranking Exercise Results
- 7- Priorities seen as Essential by Customers
- 8- Comparison to 2016
- 9- Value of Priorities
- 10- Conclusions
- 11- Appendix

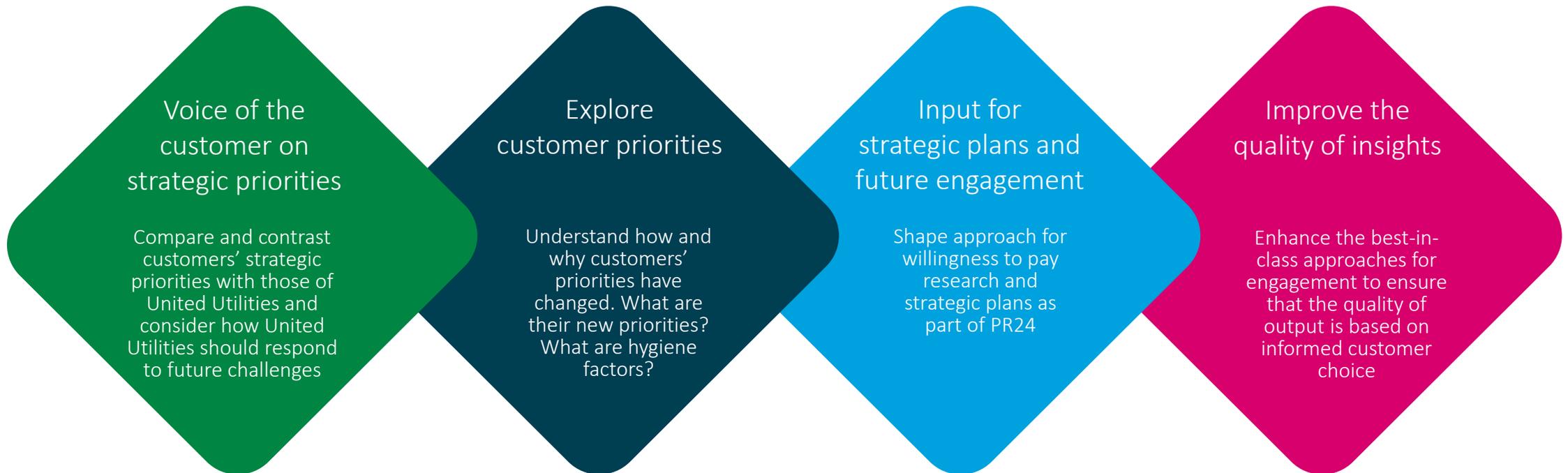
# Objectives and engagement approach

# Objectives for this engagement

**Customer engagement is central to the United Utilities planning process.** It's important to understand customers' priorities early on to determine your focus for AMP8. You wanted to engage with your customers to ensure your investment and delivery reflects customers' priorities.

You wanted to further explore customers' preferences concerning the services you offer.

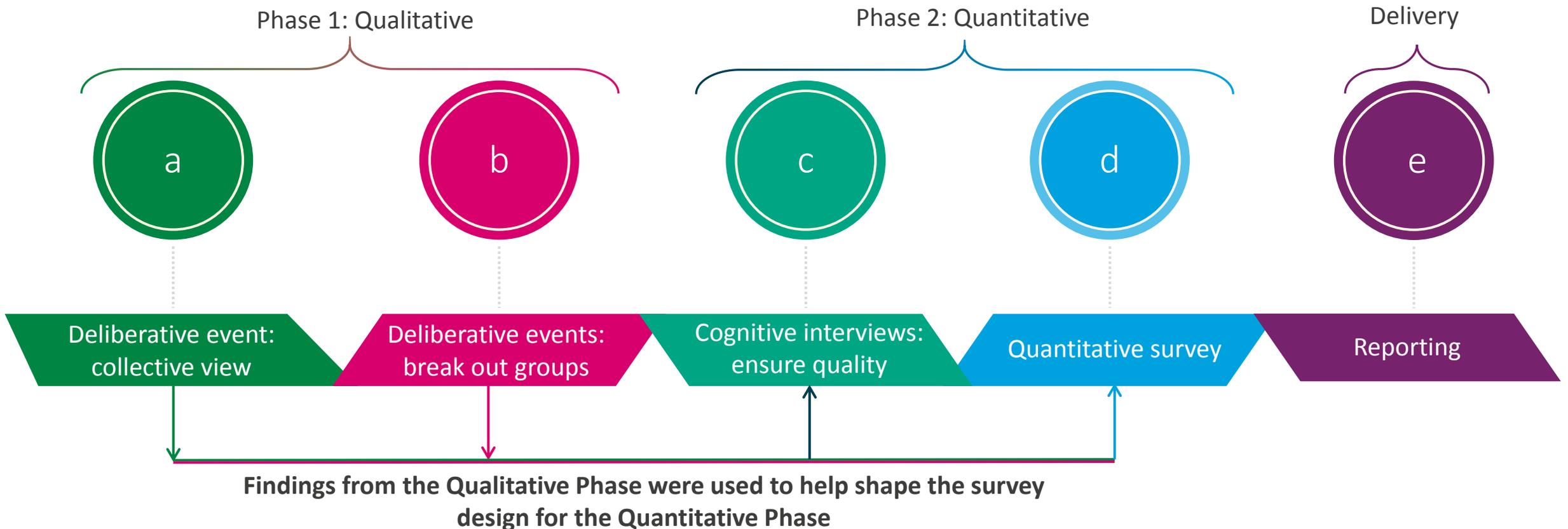
Overall, you wanted to explore **how and why** customer priorities have changed since 2016 and if they have new priorities in the context of Covid 19. The impact of Covid 19 is set out in Appendix 7.



# Overview of approach

The purpose of Phase 1 was to qualitatively gain in-depth insights into customer priorities and shape the second phase.

Phase 2 aimed to quantify customers' order of priorities by customer types and compare with previous PR19 findings.



# The focus of this report is the second quantitative phase

The findings set out in this report focus on the second quantitative phase, with relevant insights being highlighted from the qualitative phase.

A separate report sets out the findings of the first qualitative phase.



## Phase 2: Quantitative methodology used

To ensure high quality of insights from the quantitative phase, we conducted cognitive interviews before finalising the questionnaire. This ensured that customers understood the questions they were being asked in relation to priorities, as well as the overall look and feel of the survey.

This testing phase was followed by a full quantitative study to understand customer priorities for future investment and to give early indication of acceptance of a potential bill increase.

### What we did



# Phase 2: Quantitative insights gained

This report sets out the insights that were gained from the Quantitative engagement.

## Overall customer priorities (Max Diff exercise)



- This section gives insight into what **customers' priorities are when comparing all outcomes together**.

- It sets out what *outcomes* matter most and by how much (relative to one another) and why.

## Priorities within service areas (Ranking exercises)



This section gives **detailed insights** into customers' **priorities within each service area** such as water, wastewater, etc.

This shows a ranking of *detailed, service level priorities*.

## Change in priorities since 2016 What matters more in 2021



This section provides insights into **how customers' priorities have changed since 2016**.

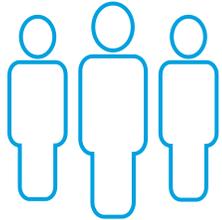
## Value of priorities Acceptance of bill change



This section provides an indication of the **overall value of the priorities**.

Note: The result in £ is only an indication of general value, not an indication of Customers' actual willingness to pay.

# Who did we engage with?



We spoke to **3,106** customers  
**1,264** Household general population  
**511** In vulnerable circumstances  
**504** Low income  
**234** Future Bill Payers  
**91** Digitally excluded  
**502** Business customers



Fieldwork:  
**29<sup>th</sup> October – 21<sup>st</sup> November 2021**



Respondents were recruited through an online panel.



The data in this report has not been weighted. Statistical significance is indicated where applicable and tested at the 95% level.



Digitally excluded customers were recruited and took part through face-to-face interviews.



Survey length was approx.  
**20 minutes**

# Customer Groups

## General Household Customers 1,264



Household general population representative of United Utilities Region who are responsible for paying bills

## Low Income 504



Those who have a household income of less than £20,000 per year

## Business Customers 502



United Utilities business customers (with less than 250 employees), who are responsible for paying bills

## Future Bill Payers 234



Under the age of 29 and have no responsibility of paying bills

## Vulnerable Circumstances 511



- Chronic/serious illness
- Medically dependent on equipment
- Medical oxygen use
- Poor sense of smell
- Physical impairment
- Unable to answer door
- Restricted hand movement
- Pensionable age
- Children aged 5 or under
- Blind
- Partially sighted
- Hearing/speech difficulties
- Unable to communicate in English
- Dementia
- Developmental condition
- Mental health
- Female presence preferred
- Temporary life change
- Aged over 65
- Registered on the PSM



# Digitally excluded customers: bespoke engagement approach

Online panels are a good and effective way to reach customers. However, they tend to be less representative of customers who do not have the digital skill or means to be online and, therefore, part of online panels.

To overcome this issue we conducted face to face interviews in areas that have higher levels of customers that are **digitally excluded**.

The areas where we conducted face to face interviews were:

- **Manchester Local Authority**
- Longsight. According to 2011 Census 73% of population is BAME

- **Liverpool Local Authority**
- Toxteth. The vast majority of Liverpool's ethnic minorities live within the inner city

- **Knowsley Local Authority**
- Huyton, Prescot, Whiston are areas of higher deprivation (*second highest in the UK*)

We engaged with the following customers face to face

24 That were digitally excluded due to lack of skills

72 That were digitally excluded due lack of access (device or internet)

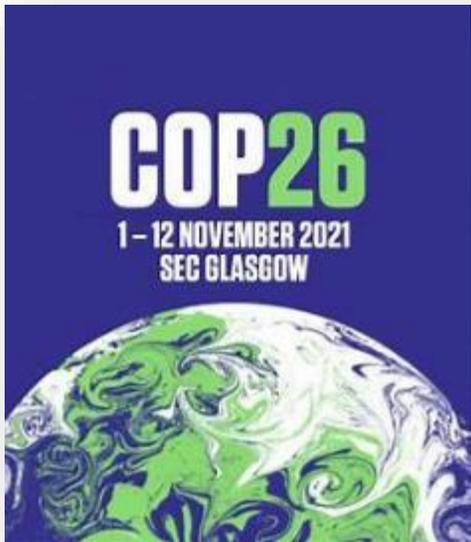


# Global context and customer experience of the engagement

# Worldwide contextual events during the engagement

During the fieldwork engagement, the following global events occurred and may have influenced customers' priorities and broader thinking.

- COP26
- Price increase in the energy markets
- Media coverage over permitted discharge from storm sewers
- End of £20 per week Universal Credit uplift



## Tory MPs defend votes after uproar over sewage proposals

25 October Comments



Campaigners are concerned about the impact of sewage discharges on many rivers.

Tory MPs have been defending themselves from accusations they have given the go-ahead to water companies to dump raw sewage in rivers.

A proposal from the Lords to the Environment Bill that would have placed legal duties on the companies to reduce discharges was defeated by 265 MP votes to 202 last week.

## UK energy bills to rise after record wholesale electricity prices

Analysis by Imperial College London adds to concerns about more households being pushed into fuel poverty



UK electricity system in 2021. The electricity market price has passed the £100 a megawatt-hour mark for the first time since the market was formed in 1990. Photograph: Gareth Fuller/PA. Household energy bills are to rise after prices on the UK's wholesale electricity market soared to a record high last month, furthering concerns about more families being pushed into fuel poverty this winter.

## When does the Universal Credit uplift end? What happens when £20 Covid benefit increase ends after September

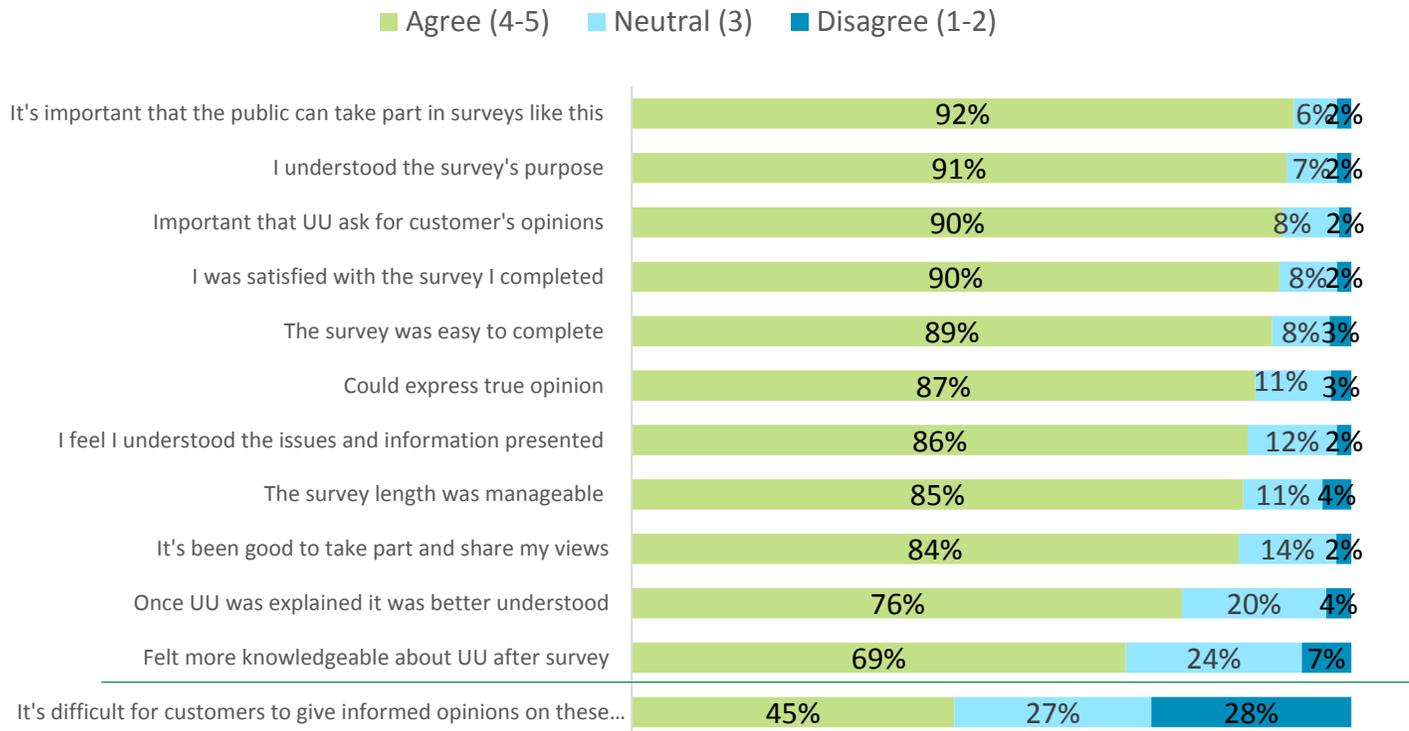
The Government said the move to stop the £20 Universal Credit uplift been made as there needs to be a shift to getting people back to work.



# Participant engagement in phase 2: Quantitative engagement

The majority (87%) of respondents felt able to express their true opinions and thought it was important for United Utilities to ask for their customers' views on these topics.

However, customers do recognise that it is difficult to give informed opinions on these topics as they do not have the depth of knowledge.



'Relevant and important study to gain insight for future development.'

'I actually learned more about United Utilities doing this survey than any pamphlet that comes through the letterbox.'

'I'm encouraged that United Utilities is seeking a broad viewpoint on these issues and that the environment and sustainability are important to them.'

U1 On a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, to what extent do you agree with the following statements about taking part in this research? Base: Total Sample (3106)  
 U2 If you have any additional feedback, please enter your comments here. Base: Total Sample (3106)  
 D2 On a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, to what extent do you agree with the following statements about the survey? Base: Total Sample (3106)

# Overview of findings

# Key findings from the *qualitative* phase: All priorities are important

All the **priorities** tested were considered to be of **some importance** to customers. There were no priorities considered to be of zero importance.

No **new priorities** were introduced as a result of the qualitative phase. However, the priority of '**using higher water charge to encourage water efficiency**' was removed, as customers felt it disadvantaged some customers.

**Priorities were simplified** after the qualitative phase to ease understanding. Some priorities were also **grouped together** as customers highlighted these were similar. Priorities were also grouped together into outcomes that could be used in the max diff exercise.

Future bill payers and business customers would like to see **affordability** and the **environment** as a bigger priority for United Utilities.

The quantitative phase asked people to **choose the order of which priorities are important to them** as a customer, **not** what is considered important and what is considered not important.

# Summary of quantitative findings

- **Providing safe water** to drink is by far the most important to all customers.
- It is seen as a 'hygiene factor' that must be delivered.

- A **reliable supply of water now and in the future** is an important priority to almost all customers.
- However, future bill payers placed this 4<sup>th</sup>.

- **Limiting the odour, flies and noise caused by United Utilities** operations,
- **avoiding disruption to travel**, and
- a better **digital experience** are consistently of the lowest importance for all customer types.

Future bill payers and business customers placed comparatively less importance on this, allowing other priorities to feature more strongly.

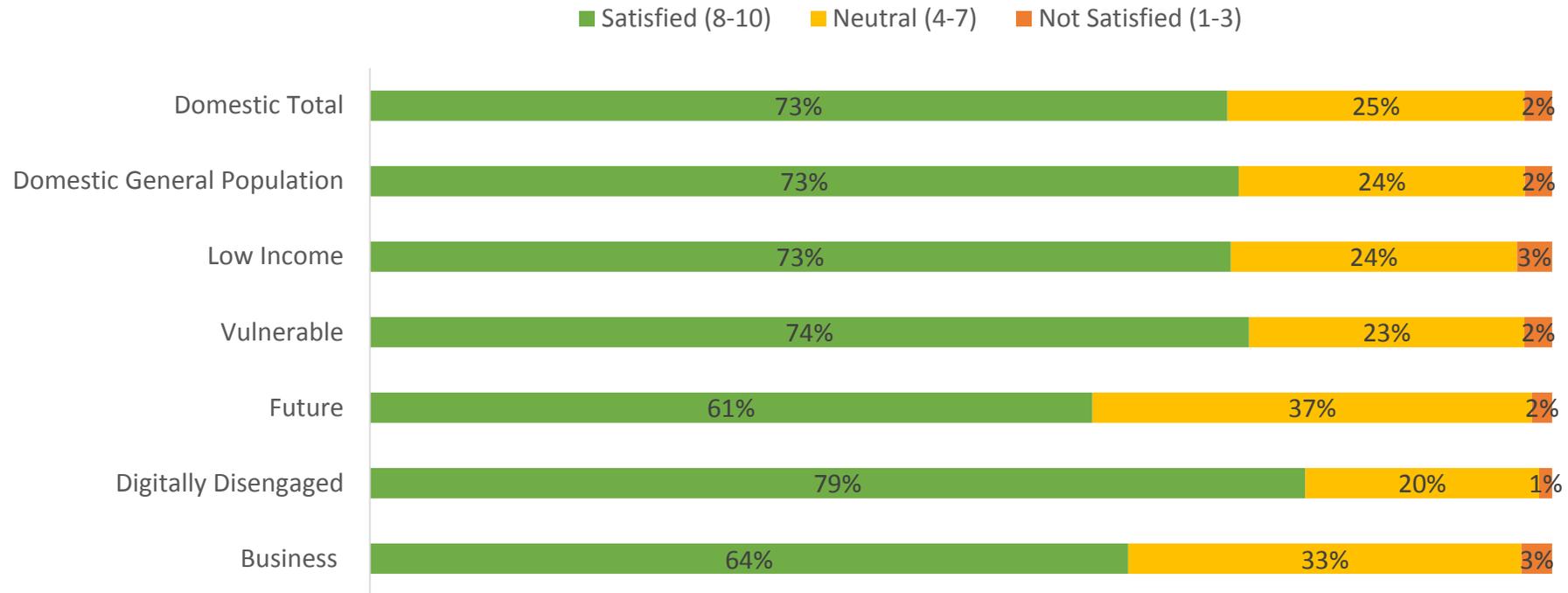
- **Protecting the environment, meeting future challenges through sustainable solutions** and
- **supporting customers with low incomes / in vulnerable circumstances** were second most important as a group of priorities, and they mattered most to future bill payers.

- **Reducing leakage and flooding is a low priority overall**,
- but they held slightly more importance for business customers than Household customers.

# Satisfaction with United Utilities

# Customer satisfaction with United Utilities' services

Most customers are satisfied with the services they receive from United Utilities. The highest satisfaction rate is among those that are Digitally Excluded (79%). Future Bill Payers have the most neutral levels of satisfaction at 37%, followed by Business Customers at 33%.



## Insight spotlight

Ensure that future bill payers and business customers' feelings of neutrality do not become dissatisfaction

Q1 Thinking about United Utilities overall, how satisfied are you with the services you receive? Base: Household Total (2,604) Household General Population (1,264); Low Income (504); Vulnerable (511); Future Bill Payers (234); Digitally Excluded (91) Business (502)

# Max-Diff Outcomes Prioritisation Results

# Why use Max Diff?

The Max Diff approach was used for assessing customers' priorities when comparing all outcomes together. This approach was used in the 2016 PR19 work and is preferred to a simple ranking approach for the following reasons:



## Limits of a simple ranking

A ranking exercise will give us the order of importance of certain statements, from most important to least important.

However, this does not show **the magnitude of difference between each one.**



## The benefit of max diff

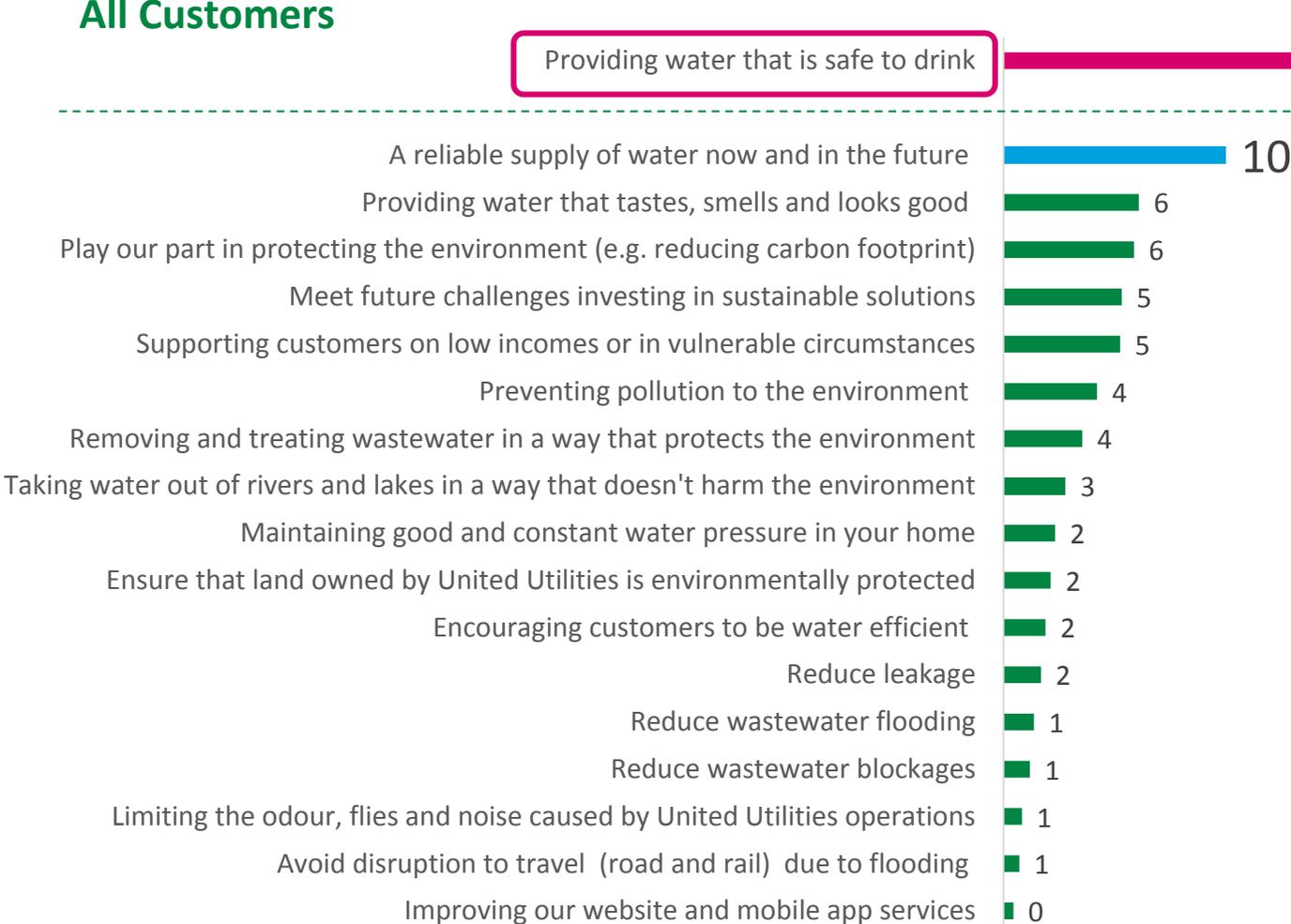
A max diff will show the rank order of importance. In addition, it also provides the **relative difference between each statement, i.e., How much more important one statement is compared to another.**

**As a reminder, all the priorities tested were considered to be of some importance to customers. There were no priorities considered to be of zero importance.**

# How to interpret the Max Diff results

This chart shows all 18 priorities with their Max Diff expressed as a proportion of the total importance attached to all the priorities in total. This chart shows the max diff results for All Customers

Most important priority



44

The total of all the numbers add to 100. Each value shows the proportional importance of each priority; the larger the proportion, the more important the priority. The scores for the priorities are relative to one another; therefore, a value of 10 is twice as important as a value of 5.

In this example, 'Providing water that is safe to drink' is approximately four times more important than 'A reliable supply of water now and in the future'.

Least important priority

# Outcomes tested

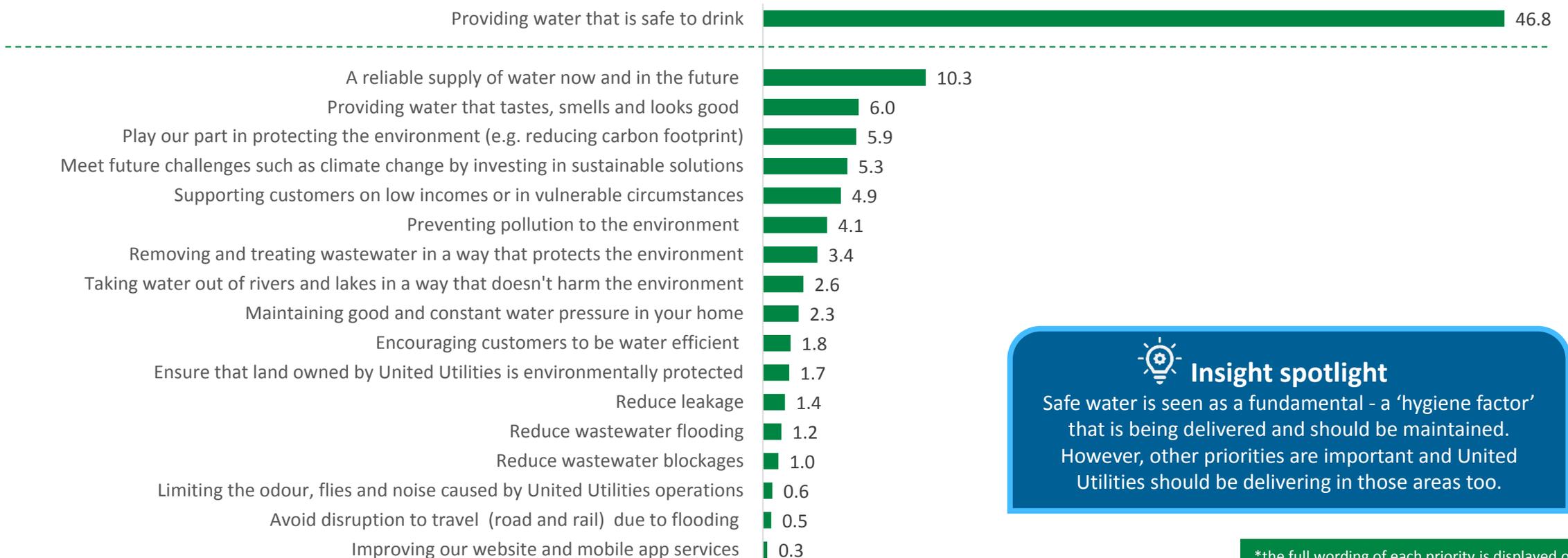
1. A reliable supply of water now and in the future
2. Encouraging customers to be water efficient
3. Reduce wastewater blockages
4. Reduce wastewater flooding
5. Removing and treating wastewater in a way that protects the environment
6. Avoid disruption to travel (road and rail) due to flooding
7. Supporting customers on low incomes or in vulnerable circumstances
8. Improving our website and mobile app services for a better digital customer experience
9. Preventing pollution to the environment
10. Limiting the odour, flies and noise caused by United Utilities operations
11. Ensure that land owned by United Utilities is environmentally protected, open to the public and promotes nature and wildlife recovery
12. Meet future challenges such as climate change and population growth, by investing in sustainable solutions
13. Play our part in protecting the environment (e.g. reducing carbon footprint, air pollution and use of plastics)
14. Providing water that is safe to drink
15. Providing water that tastes, smells and looks good
16. Maintaining good and constant water pressure in your home
17. Reduce leakage
18. Taking water out of rivers and lakes in a way that doesn't harm wildlife or the environment



# All priorities – Household General Population

‘Safe water to drink’ was the most important priority for all customers. It is approximately four times more important than a ‘reliable supply now and in the future’.

From the qualitative stage, customers described safe drinking water as a ‘hygiene factor’ that they expected as a ‘given’ for all water companies.



 **Insight spotlight**

Safe water is seen as a fundamental - a ‘hygiene factor’ that is being delivered and should be maintained. However, other priorities are important and United Utilities should be delivering in those areas too.

\*the full wording of each priority is displayed on slide 23

The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.

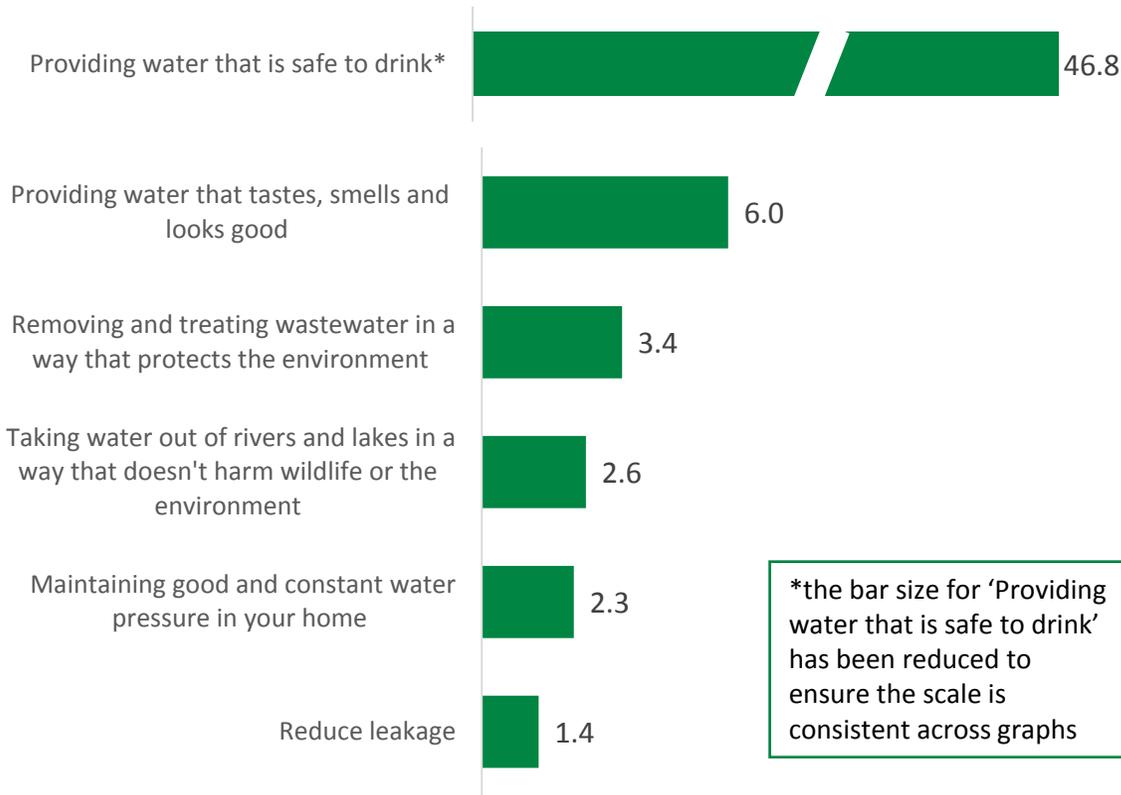


# Less and more discretionary priorities – Household General Population

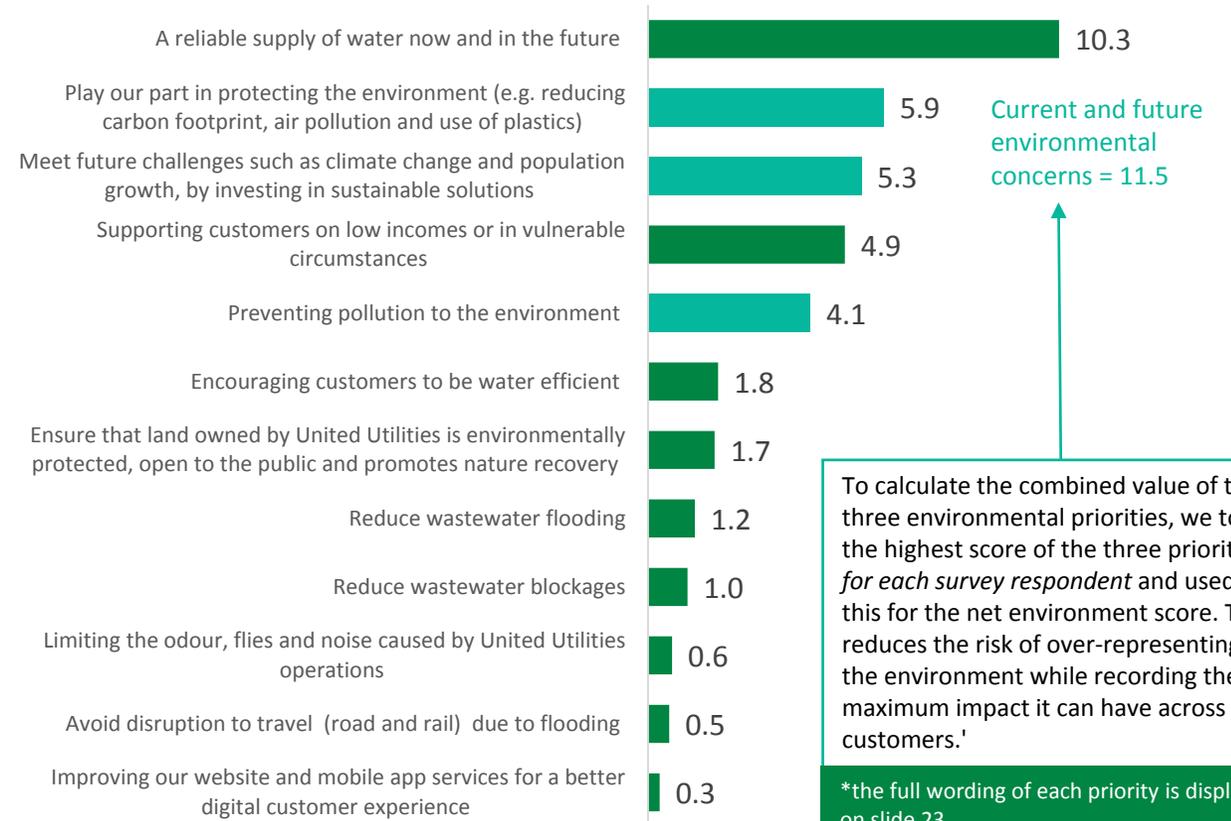
Of the more discretionary investment opportunities, ‘protecting the environment’, ‘meeting future challenges such as climate change’ and ‘preventing pollution’ have a combined importance of 11.5.

This combination makes ‘current and future environmental concerns’ the second most important combined priority after safe drinking water.

## Less discretionary investment opportunity



## More discretionary investment opportunity



The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.

# Those who have experienced a service failure – All Domestic Customers

Max diff results where consistent amongst most domestic customers who experienced a service failure

**‘Providing water that is safe to drink’** was the most important for all domestic customers (45.3) but it was **highest for customers who had experienced an interruption to supply** (48.9).

**‘A reliable supply of water now and in the future’** was the 2<sup>nd</sup> most important for all domestic customers (10.4) but it was **lowest for customers who had experienced unpleasant smelling water** (8.7).

Customers who had **experienced flooding in their home** said **‘Providing water that tastes, smells and looks good’** is 6<sup>th</sup> most important (5.8) compared to 3<sup>rd</sup> place for all domestic customers (6.2).

Customers who had **experienced flooding in their home** said **‘Supporting customers on low incomes or in vulnerable circumstances’** is 3<sup>rd</sup> most important (6.9) compared to 6<sup>th</sup> place for all domestic customers (5.4).

Customers who had **experienced flooding in their home or outside still only held ‘Reducing waste water flooding’** as the 14<sup>th</sup> most important priority (1.6, 1.8), as did all domestic customers (1.2).

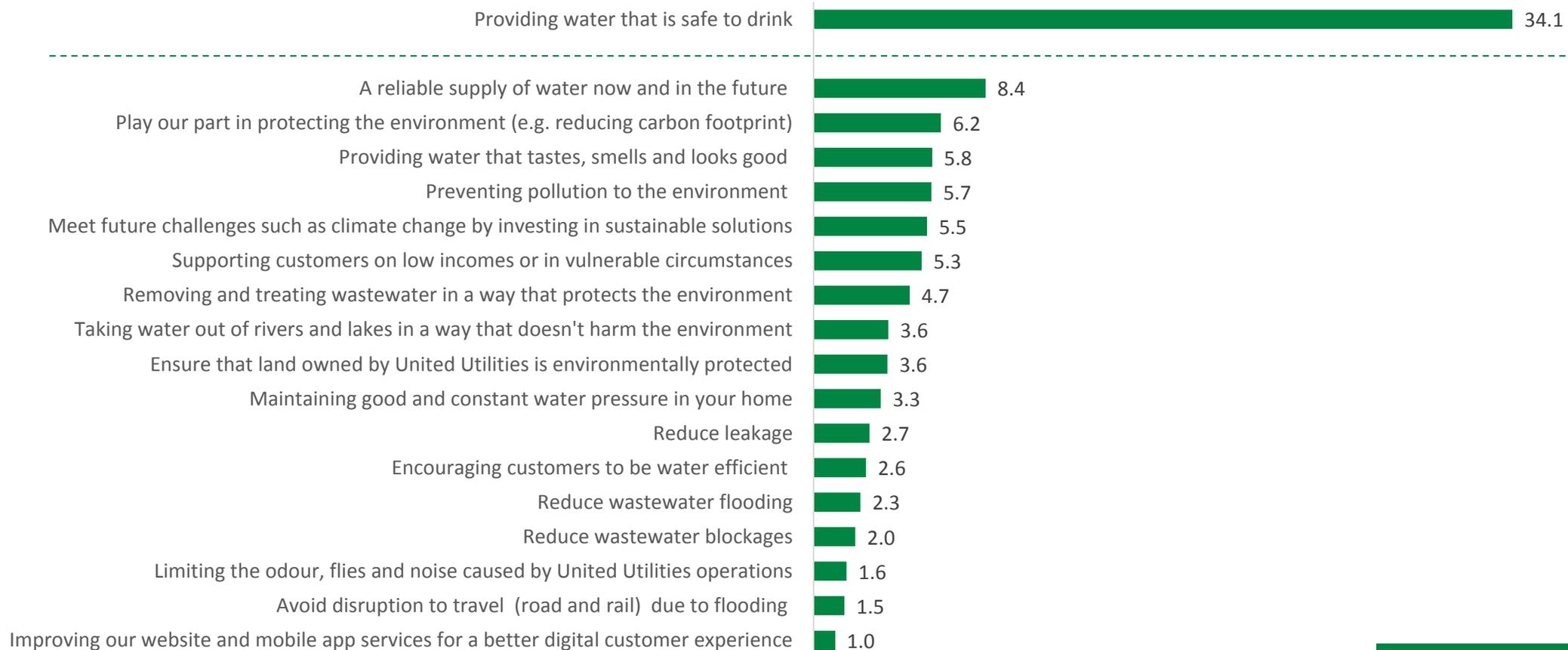
N

- All Domestic customers: 2,604
- Flooding inside: 107
- Flooding outside: 283
- Poor water pressure: 906
- Cloudy Water: 767
- Unpleasant smelling water: 322
- Interruption to supply: 766
- Near a reservoir or water works: 396
- Near wastewater works: 283



# All priorities – Business Customers

Business Customers' priorities are similar to those of General Household Customers, though 'providing water that is safe to drink' is lower in value (34 v 47), giving other priorities more presence.



\*the full wording of each priority is displayed on slide 23

The total of all the numbers in the bar chart add up to 100%. Each value shows the % importance of each item. The larger the % the more important an area is. The % of each bar are relative to each other therefore a value of 10 % is twice as important as another area with a score of 5%.

# Less and more discretionary priorities – Business Customers



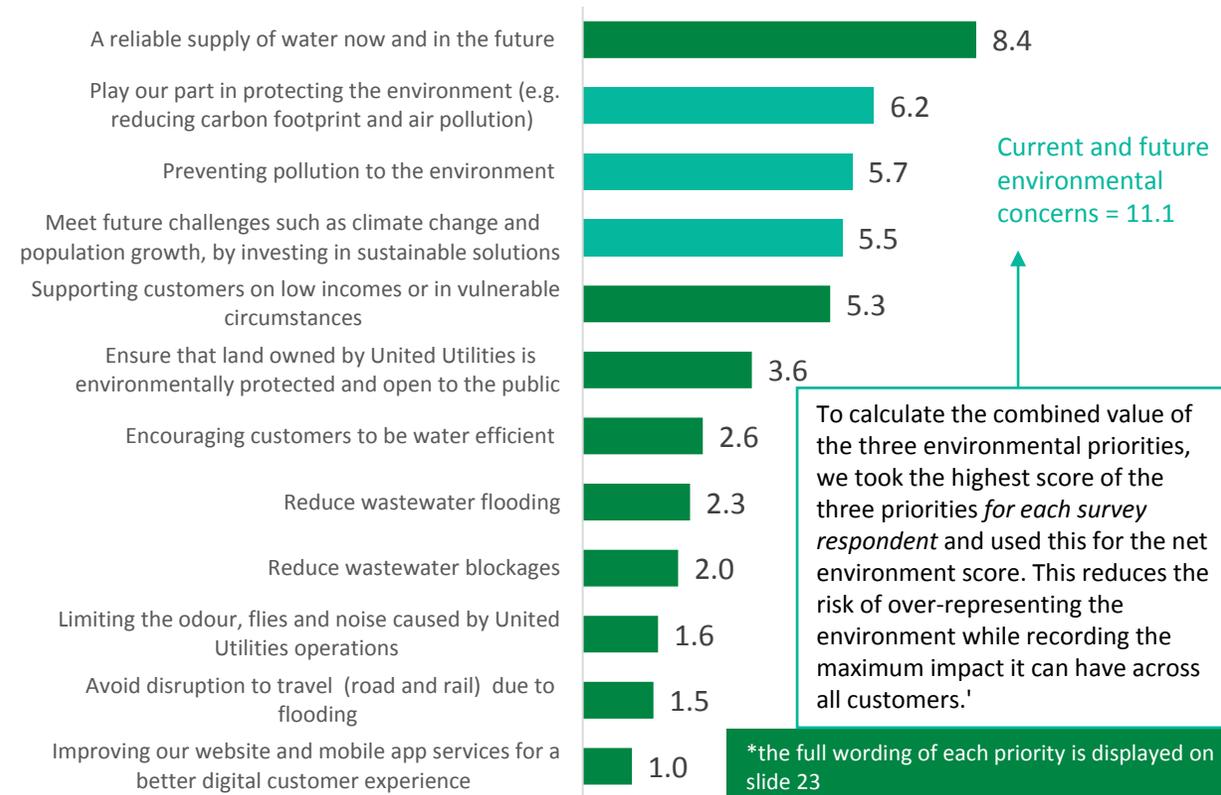
Business Customers' priorities are similar to General Household Customers in terms of their less and more discretionary priorities, though 'Current and future environmental concerns' is the second highest ranked priority, just above 'reliable supply of water now and in the future'.

However, Business Customers placed the greater importance on some lower ranked priorities – e.g. 'reducing leakage' (2.7 v 1.4) and 'wastewater flooding' (2.3 v 1.2)

## Less discretionary investment opportunity



## More discretionary investment opportunity



The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.

# Those who have experienced a service failure – All Business Customers

Max diff results where consistent amongst most Business customers who experienced a service failure

'Providing water that is safe to drink' was the most important for all business customers (34.1) but it was **lowest for customers who had experienced unpleasant smelling water (24.1) or flooding inside their business (25.1).**

'Supporting customers on low incomes or in vulnerable circumstances' was the 7<sup>th</sup> most important for business customers (5.3) but was **more important to customers who had experienced unpleasant smelling water (6.5) or flooding inside their business (6.4).**

Customers who **work near wastewater treatments** said 'Meet future challenges such as climate change and population growth, by investing in sustainable solutions' is **3<sup>rd</sup> most important (6.7)** compared to 6<sup>th</sup> place for all business customers (5.5).

Customers who **work near wastewater treatments** said 'Providing water that tastes, smells and looks good' is **8<sup>th</sup> most important (5.2)** compared to 4<sup>th</sup> place for all business customers (5.8). But it was more important to those who had **experienced flooding outside their business who placed this as 3<sup>rd</sup> most important (6.0)**

Customers who had **experienced a flood inside or outside their business still held 'Reducing waste water flooding' as the 14<sup>th</sup> (2.7) and 13<sup>th</sup> (2.7) most important priority**, but placed slightly more importance on this than all business customers (2.3).

N

- All Business customers: 502
- Flooding inside: 110
- flooding outside: 138
- Poor water pressure: 171
- Cloudy Water: 124
- Unpleasant smelling water: 64
- Interruption to supply: 155
- Near a reservoir or water works: 98
- Near wastewater works: 93



# What customers voiced about the environment

‘Whether the population declines or not, we've still got the **environmental challenges that we're facing imminently**. I would like to see that further up the list. If we're all rowing in the same boat at least we might get there a little bit faster.’  
(Business Customer) (Deliberative Event)

‘I think preventing pollution is a **given**.’  
(Vulnerable) (Deliberative Event)

## Key themes

- The environment is a higher priority than it was 2016
- It's of assumed importance
- The environment is linked to some customers identity and values.

‘As future bill payers I think the environment is such a **big part of who we are and what we think is important**, and companies that focus on that and advertise that, are a lot more attractive in that sense. It makes you feel better about paying those bills; **it makes you feel that you're doing something good**.’  
(Future Bill Payers) (Deliberative Event)

‘**Its logical** I think and I'm glad they do things like protect wildlife, that's important to me.’  
(Future Bill Payers) (Deliberative Event)



# What customers voiced about flooding and leaks

'I'm quite surprised that the responsibility of stopping leakages falls on United Utilities shoulders, because I can't really imagine a scenario in which it's not really the landlord's fault, I mean surely it has to be a burst pipe or something?'  
(Future Bill Payer-Deliberative event)'

'I think it's all important, but... if there was ways of reducing the amount of rain waters going into the sewers it **would help a lot of people.**'  
(Household Customer)  
(Deliberative Event)

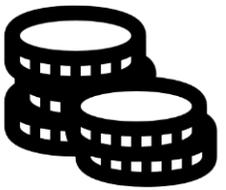
## Key themes

- Some lacked awareness of how rain water contributes to flooding
- Assumed that flooding will be reduced as part of BAU
- Responding quickly to flooding is important.

'I just think that they should get the other stuff right, the storm drains etc., to prevent the floods; **I think that's a bigger problem.** I think we've all got a duty to sort the environment out.'  
(Business customer) (Deliberative Event)

'Yeah. I think, **obviously, we do want people to respond quickly to the flooding** and bursts because that will have a knock on effect to everybody's houses and everything as well. So, I think that's got to be the most important.'  
(Household Customer) (Deliberative Event)

# What customers voiced about affordability and affordability support



'It's **fundamental**, not only does it need to be providing safe and consistent water flow for us all, but **affordability comes hand in hand** with that. If it's safe and reliable for us all, but it costs a zillion pounds and the poorest of us can't have access to it, it's a moot point.' (Business Customer) (Deliberative Event)

## Key themes

- Overall affordability is seen a 'must have'
- Seen in the context of the cost of living
- Some business customers see that billing is not 'fair'.

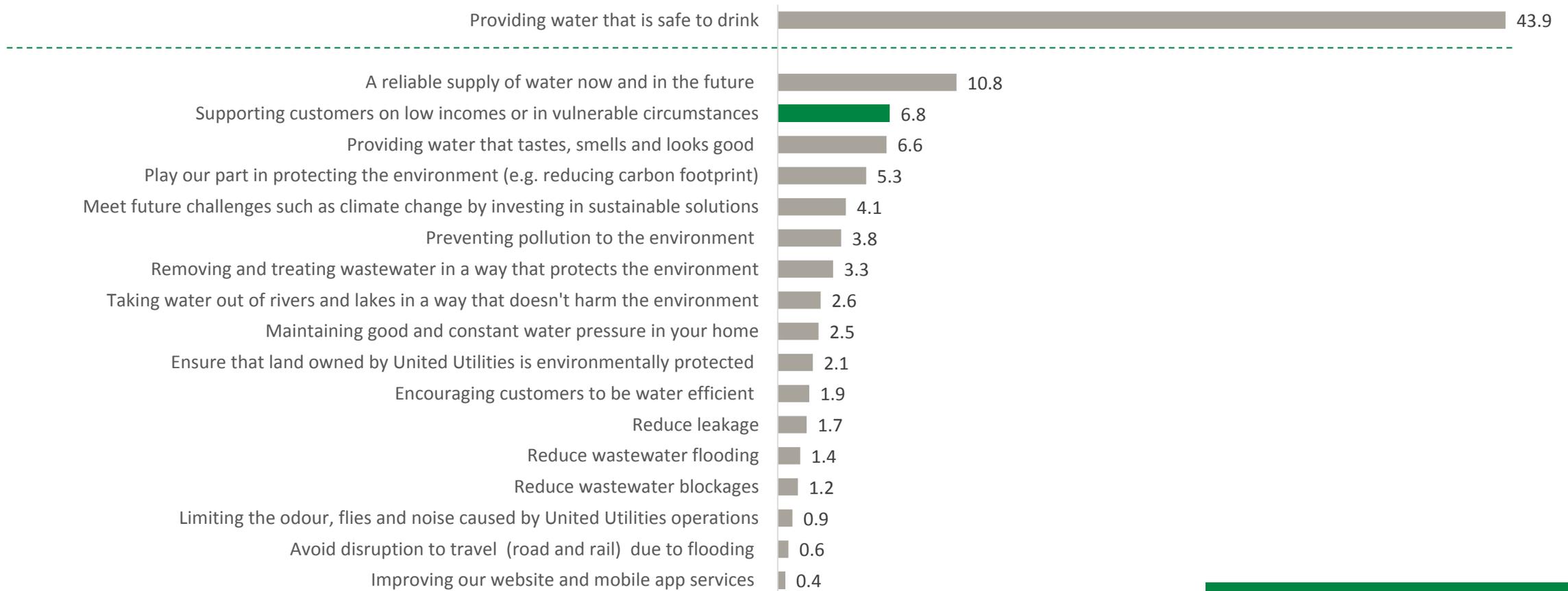
'I think it's the only industry where small businesses pay the same as big businesses and **we're taking their cost.**' (Business Customer) (Deliberative Event)

'I hate to be 'that person', but the minimum wage hasn't gone up in a very long time and young people are paying more out in rent than ever.... I do think **affordability is a concern** that a lot of young people have.' (Future Bill Payer) (Deliberative Event)



# All priorities – Low Income Customers

Low Income Customers placed a higher importance on ‘supporting customers on low income or in vulnerable circumstances’ at 6.8: this is 1.3 times more than General Household Customers (at 4.9) and places this priority third in the list compared with 6<sup>th</sup> place for general household.



\*the full wording of each priority is displayed on slide 23

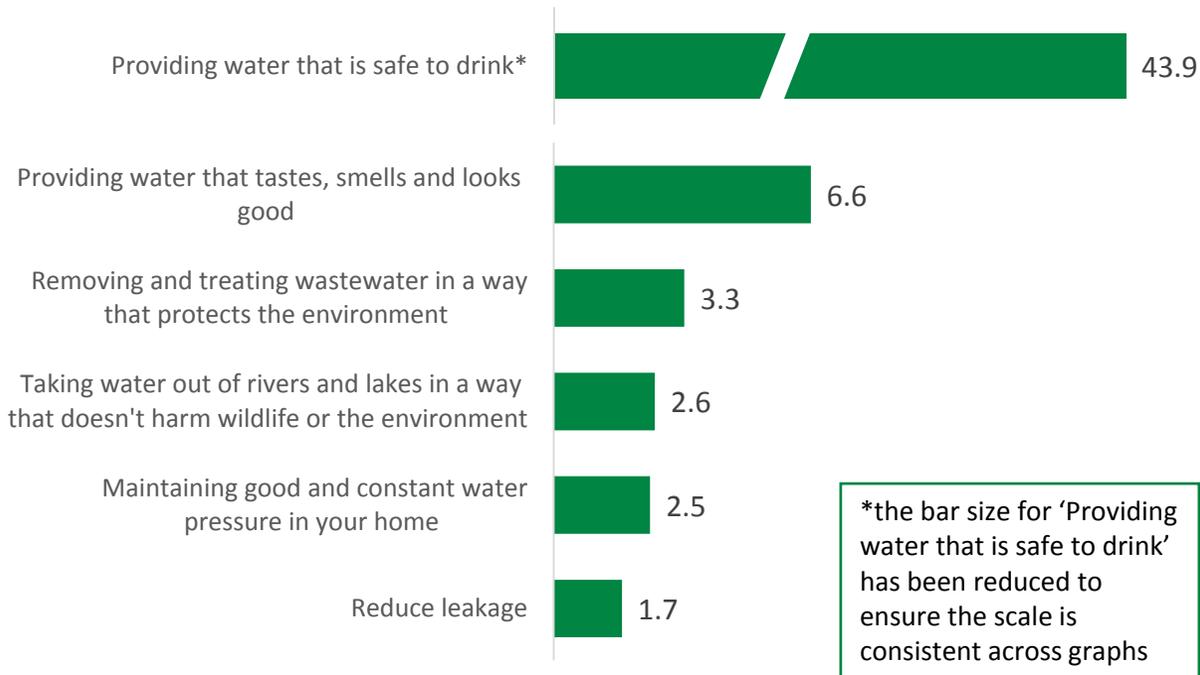
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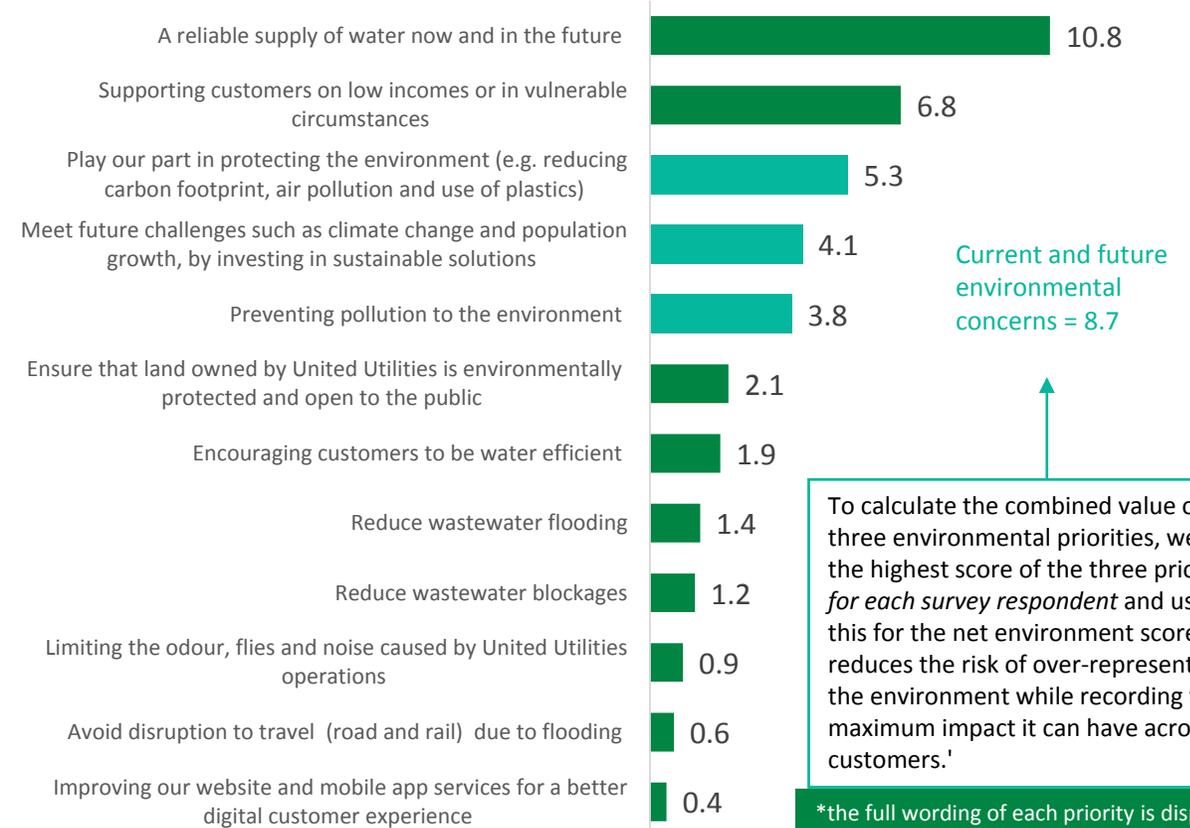
# Less and more discretionary priorities – Low Income Customers

There is a slightly different ordering of the mid-level priorities for Low Income Customers compared to General Household Customers, but overall, the focus is still on environmental areas.

## Less discretionary investment opportunity



## More discretionary investment opportunity



To calculate the combined value of the three environmental priorities, we took the highest score of the three priorities for each survey respondent and used this for the net environment score. This reduces the risk of over-representing the environment while recording the maximum impact it can have across all customers.'

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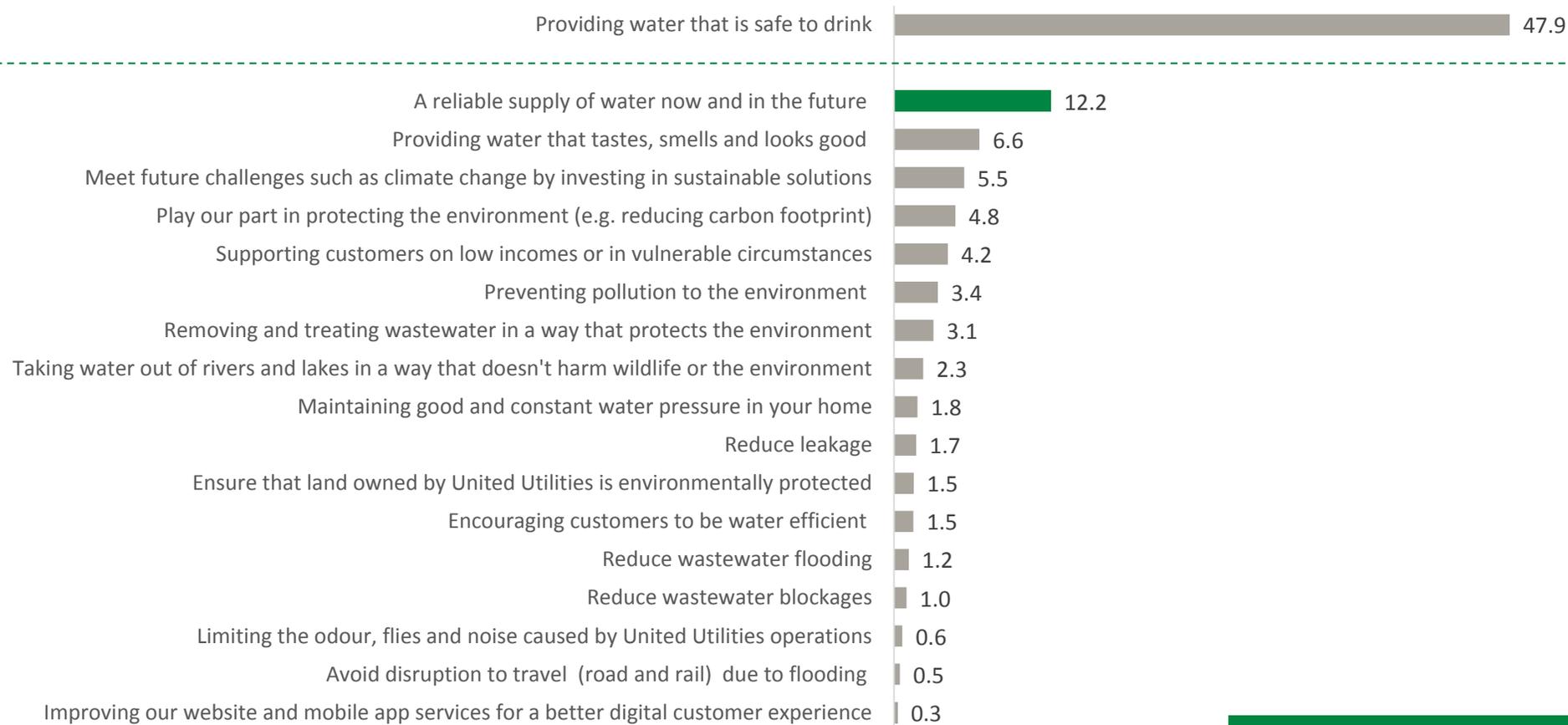
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# All priorities – Vulnerable Customers

Vulnerable Customers have a similar order of importance to General Household Customers.

However, they place a little more importance on providing a 'reliable supply now and in the future': 1.2 times more than General Household Customers (12.2 v 10.3).



\*the full wording of each priority is displayed on slide 23

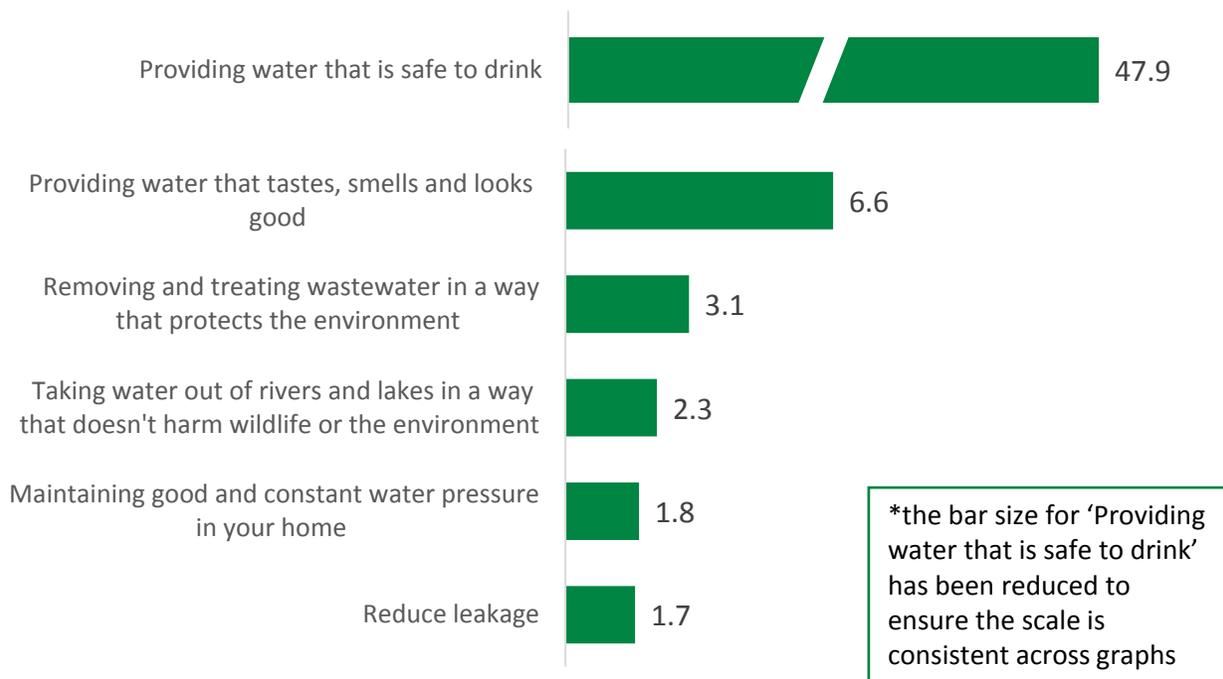
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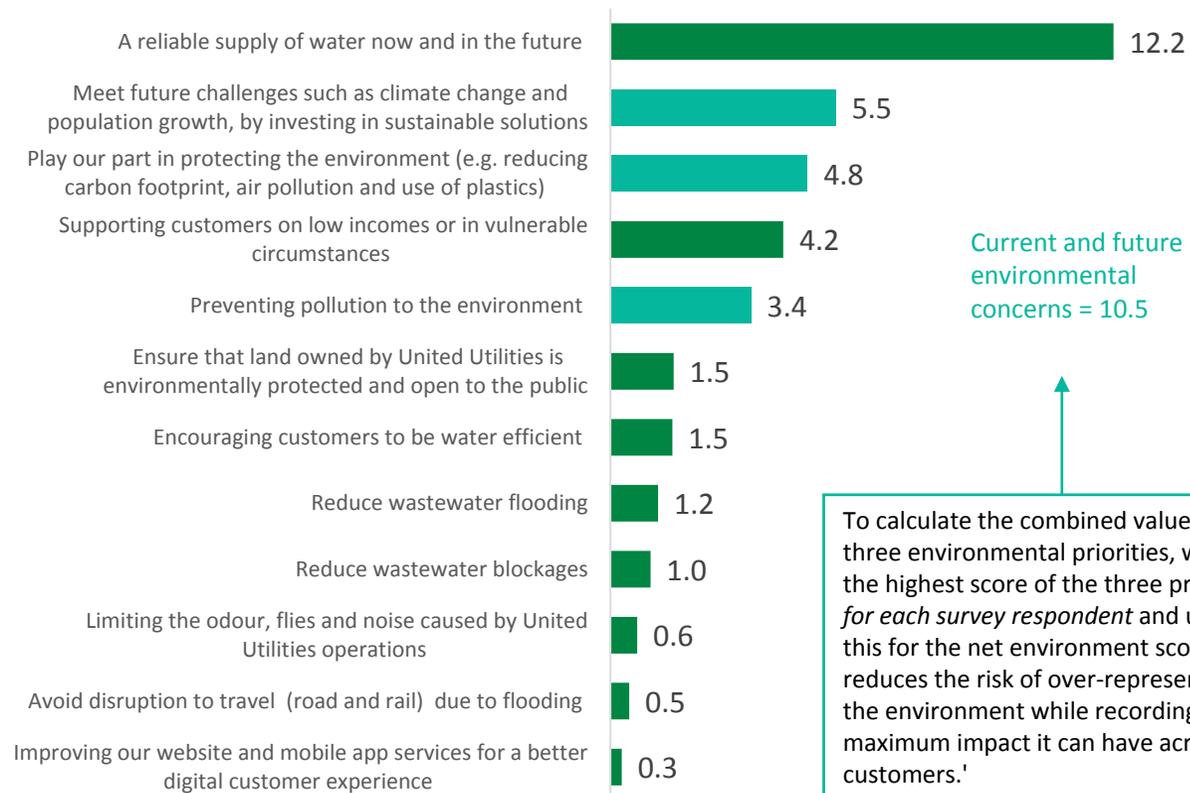
# Less and more discretionary priorities – Vulnerable Customers

Vulnerable Customers have a similar order of importance to General Household Customers in terms of their less and more discretionary priorities.

## Less discretionary investment opportunity



## More discretionary investment opportunity



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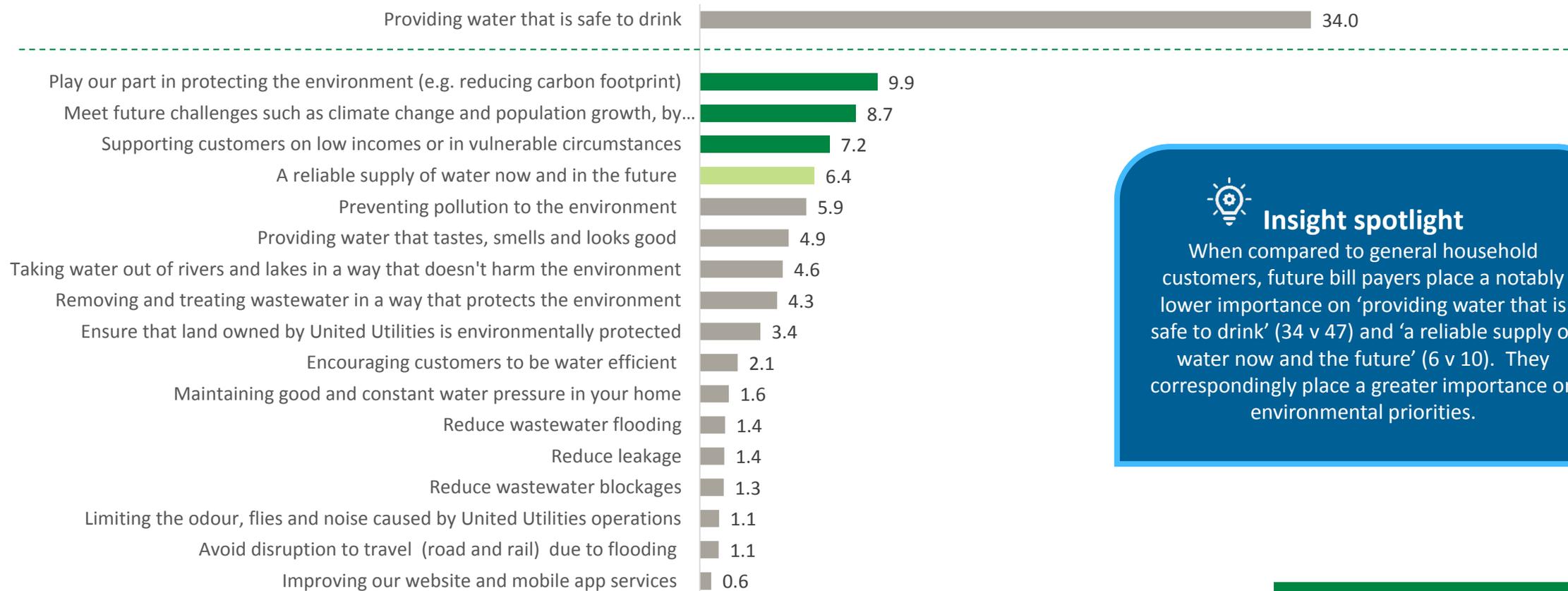
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# All priorities – Future Bill Payers

Future Bill Payers are the only customer group to place more importance on ‘protecting the environment’, ‘meeting future challenges’ and ‘supporting customers on low income or in vulnerable circumstances’ above a ‘reliable supply of water now and in the future’.



**Insight spotlight**

When compared to general household customers, future bill payers place a notably lower importance on ‘providing water that is safe to drink’ (34 v 47) and ‘a reliable supply of water now and the future’ (6 v 10). They correspondingly place a greater importance on environmental priorities.

\*the full wording of each priority is displayed on slide 23

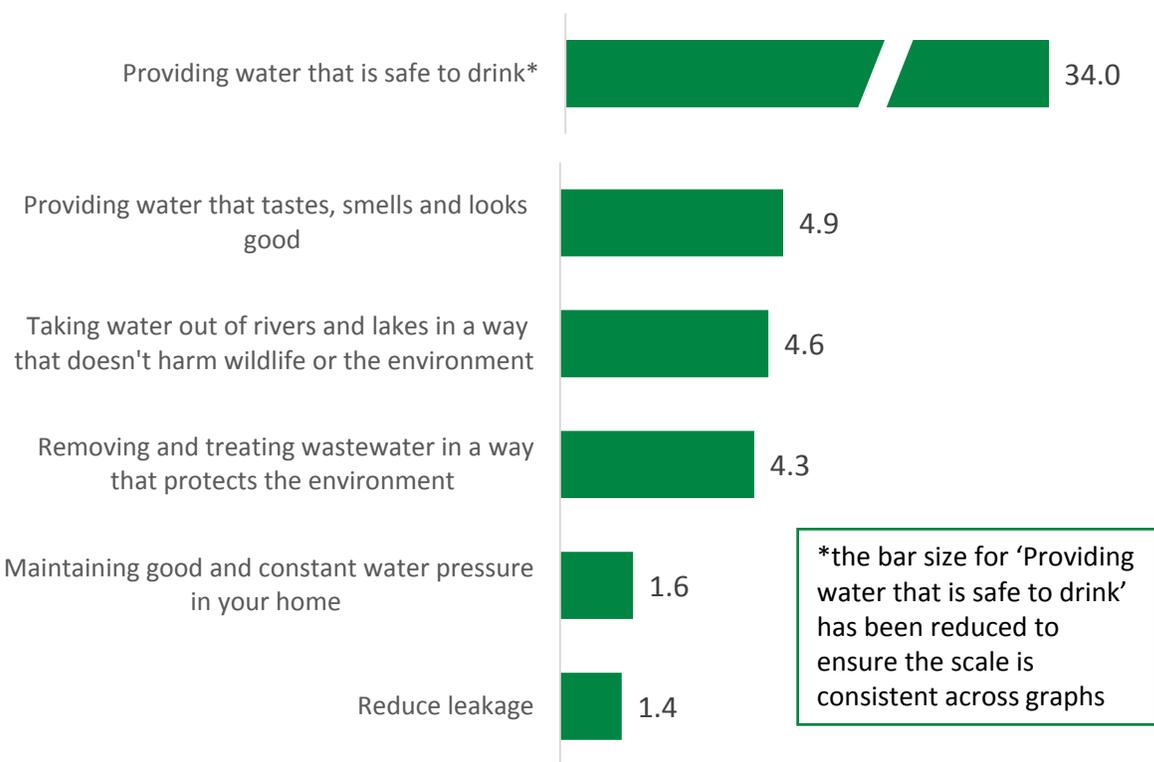
The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.



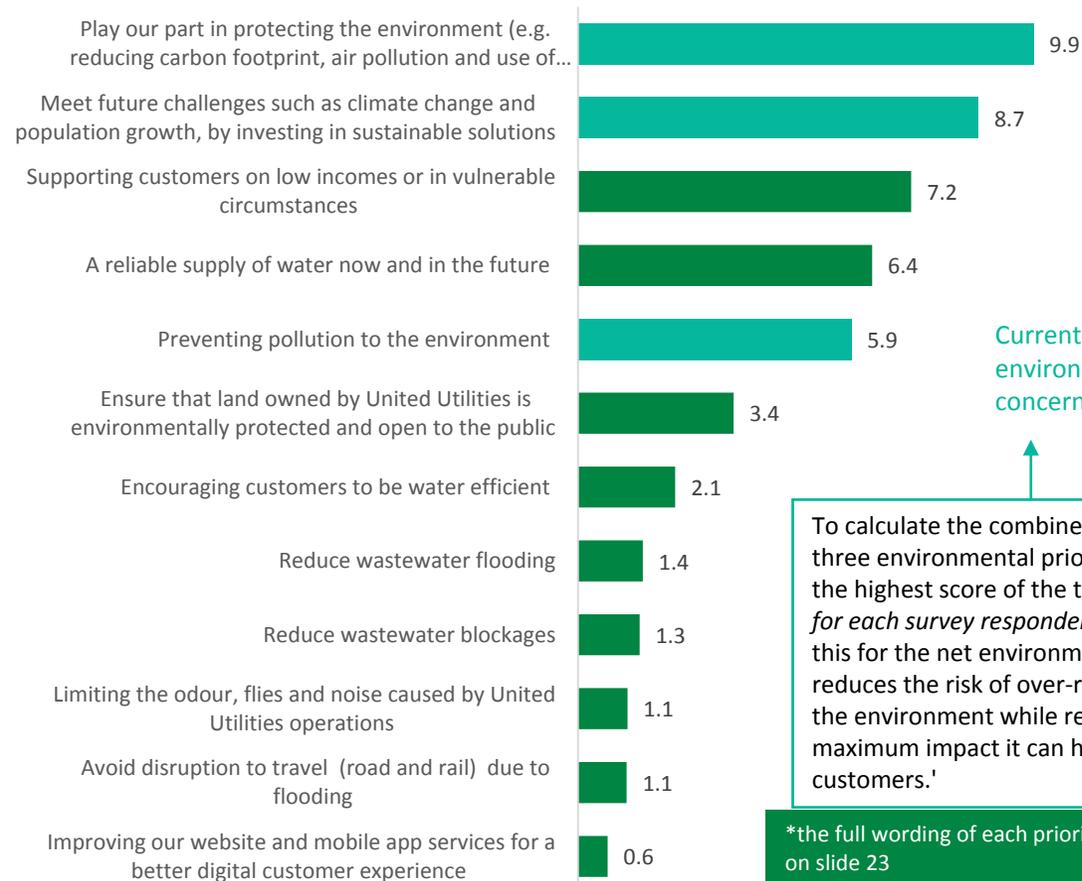
# Less and more discretionary priorities – Future Bill Payers

Future Bill Payers place much higher importance on environmental priorities (17.5 v 11.5 for 'current and future environmental concerns'). This is more than 1.5 times that of General Household Customers.

## Less discretionary investment opportunity



## More discretionary investment opportunity



To calculate the combined value of the three environmental priorities, we took the highest score of the three priorities for each survey respondent and used this for the net environment score. This reduces the risk of over-representing the environment while recording the maximum impact it can have across all customers.'

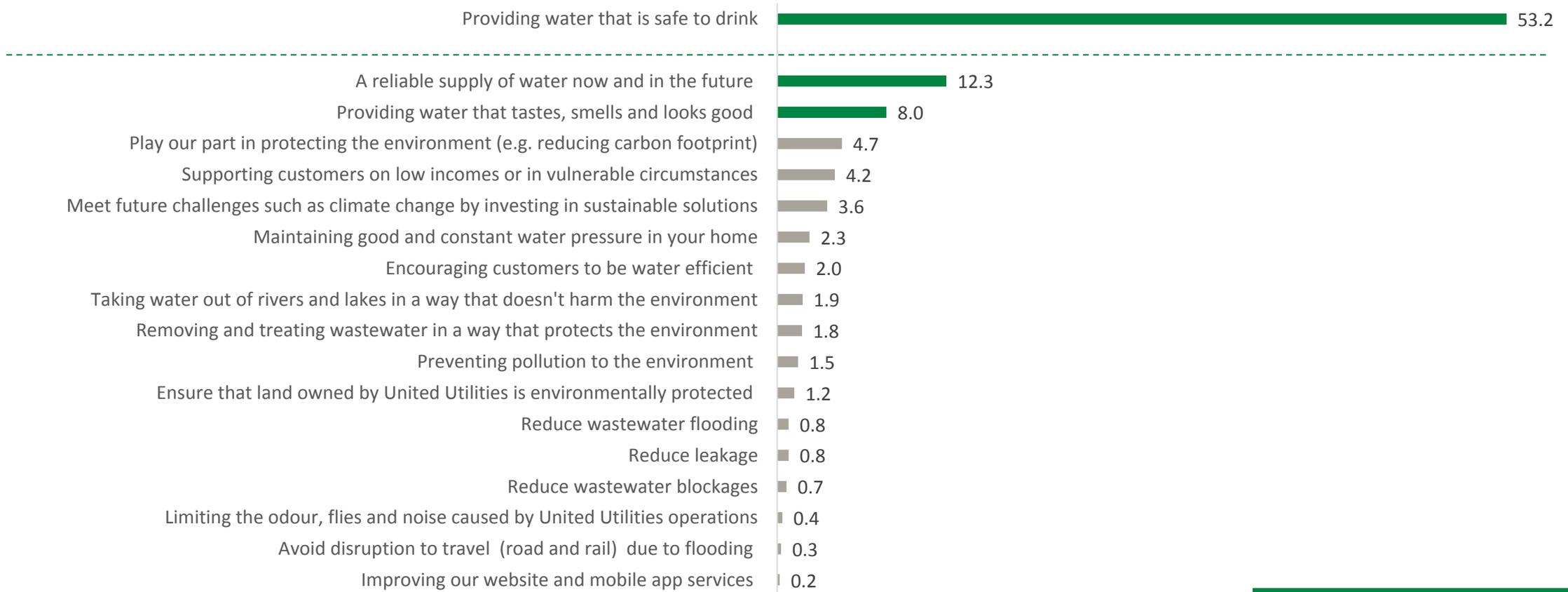
\*the full wording of each priority is displayed on slide 23

The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.



# All priorities – Digitally Excluded Customers

Customers who are Digitally Excluded have a similar order of importance to General Household Customers. However they place more importance on the top 3 priorities: ‘providing water that is safe to drink’ (53.2 vs. 46.8); ‘A reliable supply of water now and in the future’ (12.3 vs. 10.3) and ‘Providing water that tastes and smells good’ (8.0 vs. 6.0).



\*the full wording of each priority is displayed on slide 23

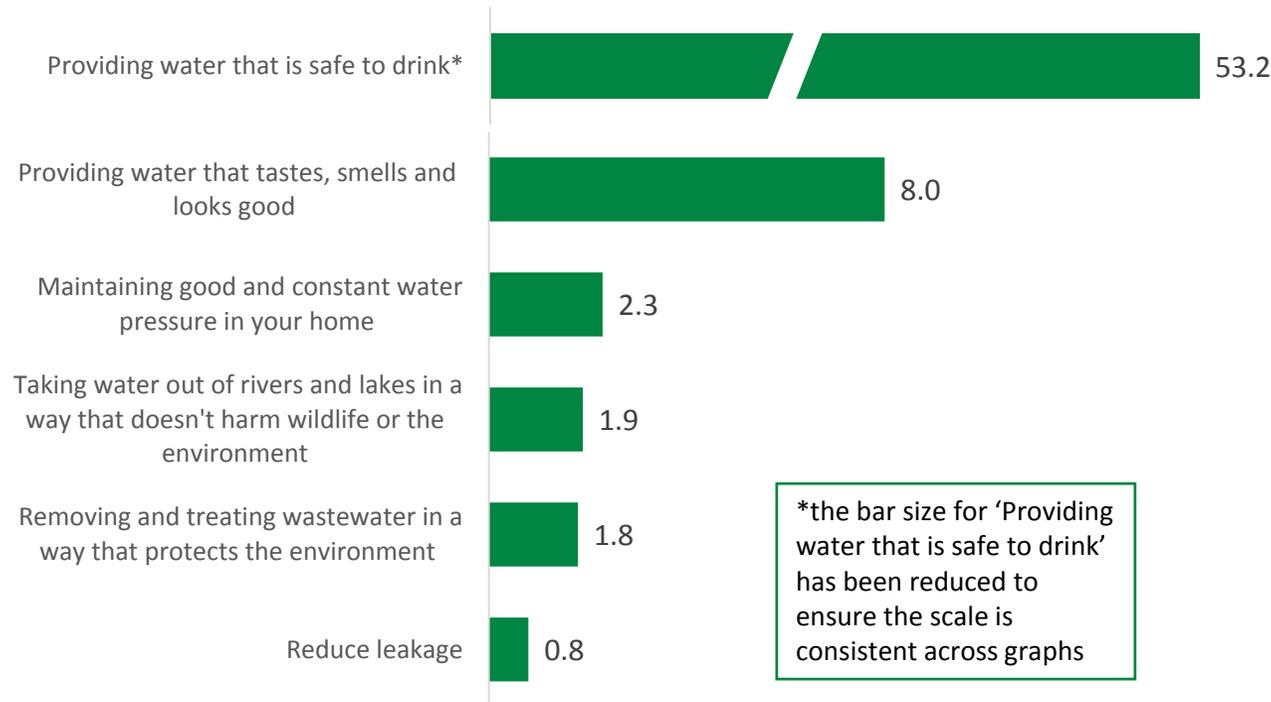
The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.



# Less and more discretionary priorities – Digitally Excluded Customers

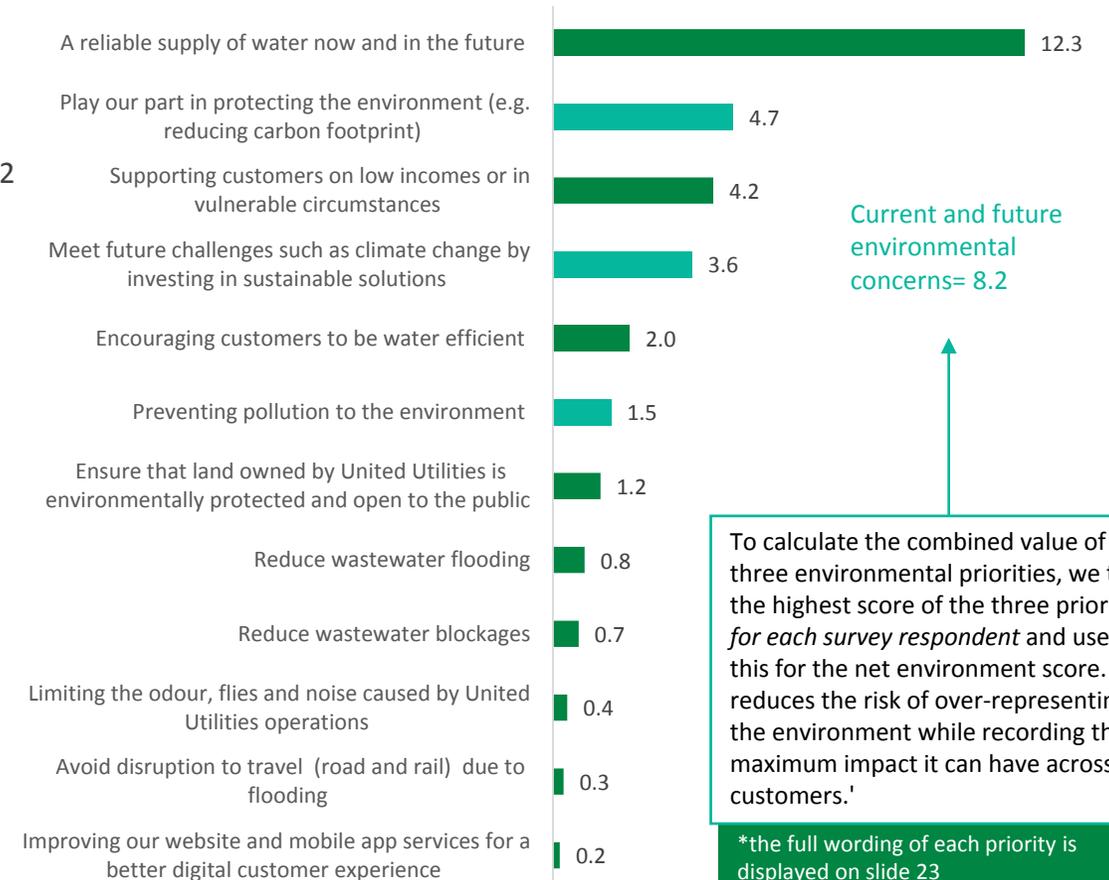
Digitally Excluded Customers have a similar order of importance to General Household Customers of their less and more discretionary priorities. ‘Current and future environmental concerns’ are however firmly in third place (compared to second).

## Less discretionary investment opportunity



\*the bar size for ‘Providing water that is safe to drink’ has been reduced to ensure the scale is consistent across graphs

## More discretionary investment opportunity



Current and future environmental concerns= 8.2

To calculate the combined value of the three environmental priorities, we took the highest score of the three priorities for each survey respondent and used this for the net environment score. This reduces the risk of over-representing the environment while recording the maximum impact it can have across all customers.'

\*the full wording of each priority is displayed on slide 23

The total of all the numbers in the bar chart add up to 100. Each value shows the proportional importance of each priority. The larger the value, the more important a priority relative to the others. The values of each bar are relative to each other; therefore a value of 10 is twice as important as another priority with a score of 5.

# Ranking Exercise Results

# Ranking Exercise- detailed service level priorities

The max diff exercise invited customers to express the relative difference in importance between each of the 18 outcome statements, at an overall level.

We then asked customers to rank detailed priorities within each of the service areas, with a total of 27 statements.

Service areas that were tested

Less Discretionary Priorities (7)

Water Demand Priorities (3)

Wastewater Priorities (6)

Customer Service Priorities (5)

Environmental Priorities (6)

## Detailed priorities for each service area that were tested in the ranking section (1/2)

	Priority	Hover Text
Water	Reducing how often your supply of water is interrupted, and for how long e.g. there is no water when you turn on the tap	Sometimes there are problems with the network such as pipes bursting, damage or major leaks which can lead to your property or business having no water for a period of time
	Ensuring we have enough water to meet demand and reduce the need for hosepipe bans (or similar)	How much water United Utilities is influenced by a number of factors such as the amount of water customers use and how much it rains. Sometimes during a period of dry weather, United Utilities may need to introduce limitations to conserve water (e.g. hosepipe bans) when reservoirs are low.
	Encouraging customers to be water efficient by providing help and advice on saving water in homes, schools and businesses	For example, using a water butt, turning off taps when brushing teeth, shorter showers, etc. United Utilities provides water saving tips to customers, schools and businesses.
Wastewater	Reducing the amount of rainwater going into sewers, to prevent sewers overflowing and causing flooding	For example, promoting natural drainage by converting areas which do not allow water to soak through like concrete, into areas which do, like natural green spaces
	Encouraging customers to only flush pee, poo and paper, and avoid pouring fats and oils from cooking down the sink to reduce sewer blockages	Blockages can be caused by other things flushed down the toilet. For example, wet wipes don't break down naturally and fats and oils can solidify into "fatburgs" which block the sewers.
	Investing more now to prevent sewers collapsing or failing (risking flooding) or needing to be repaired in the future	Maintenance and replacement of the sewer system helps to reduce the risk of sewers causing flooding.
	Ensuring our sewer network protects homes and businesses from sewer flooding	Maintenance and replacement of the sewer system helps to reduce the risk of sewers causing flooding.
	Ensuring our sewer network protects private gardens and public spaces from sewer flooding	Maintenance and replacement of the sewer system helps to reduce the risk of sewers causing flooding.
	Improve the way we manage sludge (i.e. the residue left when cleaning sewage) to better protect the environment	Sludge (or biosolids) is the residual slurry that is produced as a by-product during sewage treatment of industrial or household wastewater. The sludge collected during the process is treated and put to other uses. Most of it is recycled and used on agricultural land for farmers to use as fertiliser, but companies also use it to generate energy.
Customer Service	Avoiding disruption to travel by responding quickly to flooding and bursts on public roads	
	Installing smart water meters to support customers in reducing their water usage and help identify leaks	Smart water meters can allow you to automatically track the amount of water you use, giving you greater visibility and control over your usage and water bill. Meters also allow United Utilities to find and fix leaks more quickly.
	Provide additional affordability support to those who are struggling to pay their water bill	United Utilities currently offer some low income households reduced bills. United Utilities aim help more customers reduce their bills.
	Provide extra customer service support to those with additional needs (e.g. disabilities, learning difficulties, medical conditions etc.)	
	Improving our website and mobile app services for a better digital customer experience	For example, making new services available on the website / app so it is easier for customers to interact with United Utilities

## Detailed priorities for each service area that were tested in the ranking section (2/2)

	Priority	Hover Text
Environment	Preventing pollution due to United Utilities activities (e.g. chemical / sewage leaks into streets and rivers)	For example, pollution could be caused by an overflowing or blocked drain, leading to pollution of public or private spaces including rivers.
	Limiting the odour, flies and noise caused by United Utilities operations	This could include smells from United Utilities wastewater treatment works
	Ensure that land owned by United Utilities (e.g. reservoirs and surrounding areas) is environmentally protected, open to the public (e.g. walks, cycling) and promotes nature and wildlife recovery	With 56,000 hectares of land (e.g. reservoirs and surrounding areas), United Utilities is the largest corporate landowner in England. This land is available to the public for activities such walking and cycling.
	Reducing spills from sewer overflows (diluted sewage spilling into rivers/ sea in heavy rainfall) to reduce harm to the environment and enhance the cleanliness of our rivers	Combined Sewer Overflows are designed to discharge untreated, diluted sewage directly into rivers and watercourses in event of heavy rainfall, to prevent flooding of homes and businesses.
	Meet future challenges such as climate change and population growth, by investing in sustainable solutions	Climate change means we may have wetter winters and drier summers and population growth means that the demand for water is growing.
	Play our part in protecting the environment (e.g. reducing carbon footprint, air pollution and use of plastics)	
Less Discretionary	Providing water that is safe to drink	United Utilities supplies drinking water that complies with strict national guidelines for safety and purity
	Providing water that tastes, smells and looks good	United Utilities cleans its large water pipes and invests in its water treatment works to reduce the risk of discolouration in drinking water and ensure taste is preserved
	Maintaining good and constant water pressure in your home	Water pressure is the force that pushes water through your pipes to your taps from the United Utilities water treatment works. If your water pressure seems lower or higher than usual, it may be due to a burst pipe or a leak.
	Reducing leakage	United Utilities is responsible for reducing the amount of water lost from leaks in the water network.
	Taking water out of rivers and lakes in a way that doesn't harm wildlife or the environment	United Utilities has a role to play in making rivers cleaner each year and works closely with the Environment Agency, and Rivers Trust, to carry out this work.
	Protecting the environment and wildlife by treating sewage before returning water to waterways	United Utilities has a role to play in making rivers cleaner each year and works closely with the Environment Agency, and Rivers Trust, to carry out this work.
	Protecting lakes and beaches that people use for leisure (e.g. swimming) by treating sewage thoroughly before it is returned to the waterways	United Utilities plays a role in ensuring that the water at beaches and lakes that are designated for people to swim in, meets strict quality and safety standards

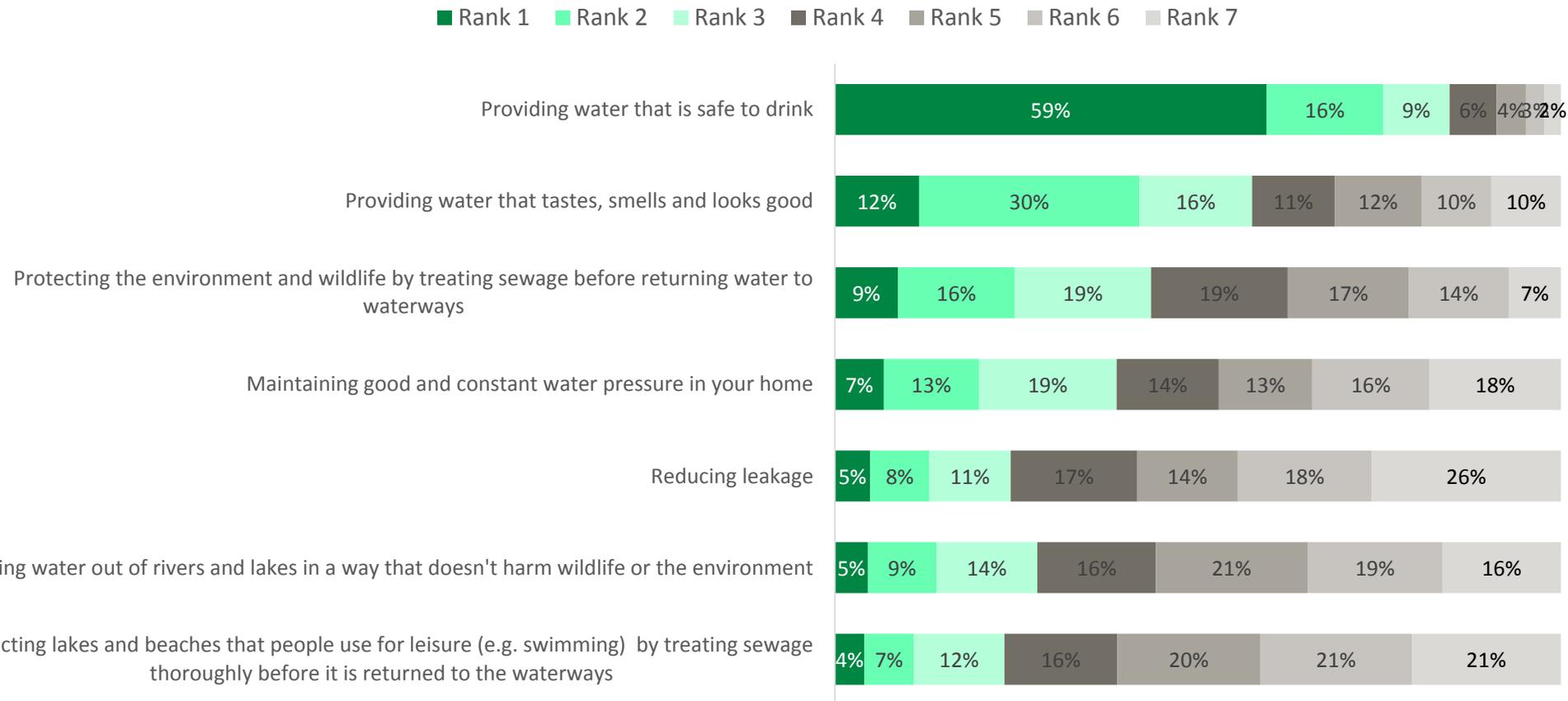
Ranking Exercise Results

**Less discretionary  
investment opportunities**



# Less discretionary investment opportunities– All Household Customers

Providing safe water to drink ‘was the most important priority for Household Customers, with 60% of customers ranking this first. Some Future Bill Payers showed a lack of understating regarding who is responsible for leaks, which may have contributed to this priority being ranked lower.



‘I’m quite surprised that the responsibly of stopping leakages falls on United Utilities’ shoulders, because I can’t really imagine a scenario in which it’s not really the landlord’s fault, I mean surely it has to be a burst pipe or something?’ (Future Bill Payers -Deliberative event)

‘I think [safe water, supply and wastewater] are meeting everybody’s expectations, don’t they?’ (Household) (Deliberative Event)

‘Safe water, it’s a pretty big one really. It’s fundamental....it, it’s a moot point.’ (Deliberative Event)

R1 Here are some initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 7, the least important to you.? Base: Household Total (2,604)



# Less Discretionary Priorities – Household Customers

‘Providing water that is safe to drink’ was the most important priority for All Customer types, including those that have a Lower Income, those that are Vulnerable and Future Bill Payers.

All customer types ranked ‘Reducing leakage’ as the least important priority, this may be because of limited understanding of whose responsibility this is.

	All Household		Household (General Population)		Low Income		Vulnerable		Future Bill Payers		Digitally Excluded	
n	2,604		1,264		504		511		234		91	
	Rank 1 Most important	Rank 7 Least Important	Rank 1 Most important	Rank 7 Least Important	Rank 1 Most important	Rank 7 Least Important	Rank 1 Most important	Rank 7 Least Important	Rank 1 Most important	Rank 7 Least Important	Rank 1 Most important	Rank 7 Least Important
Providing water that is safe to drink	59%	2%	59%	2%	59%	2%	60%	2%	57%	3%	66%	0%
Providing water that tastes, smells and looks good	12%	10%	11%	10%	13%	10%	12%	9%	12%	9%	16%	2%
Protecting the environment and wildlife by treating sewage before returning water to waterways	9%	7%	10%	7%	8%	9%	7%	6%	10%	4%	3%	10%
Maintaining good and constant water pressure in your home	7%	18%	8%	18%	5%	19%	6%	18%	6%	18%	4%	11%
Reducing leakage	5%	26%	4%	26%	6%	23%	6%	26%	2%	19%	3%	32%
Taking water out of rivers and lakes in a way that doesn't harm wildlife or the environment	5%	16%	4%	16%	4%	17%	5%	19%	6%	8%	2%	24%
Protecting lakes and beaches that people use for leisure (e.g. swimming) by treating sewage thoroughly before it is returned to the waterways	4%	21%	4%	20%	4%	20%	4%	20%	7%	28%	4%	21%

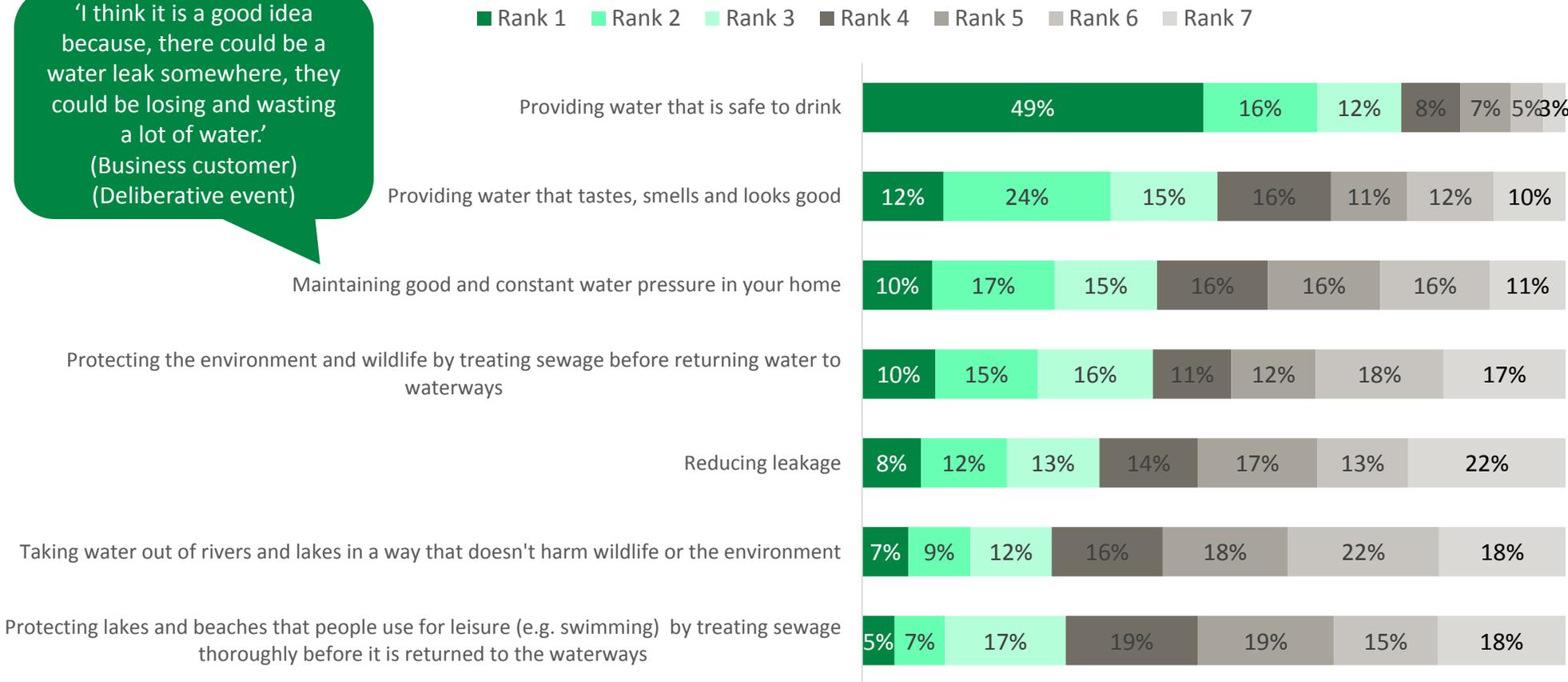
# Less discretionary investment opportunities – Business Customers



Business Customers thought that ‘providing safe water to drink’ was the most important priority, with 49% of customers ranking this in first place.

Business Customers placed a slightly greater importance on reducing leakage than Household Customers.

‘I think it is a good idea because, there could be a water leak somewhere, they could be losing and wasting a lot of water.’  
(Business customer)  
(Deliberative event)



### Businesses who use water for manufacturing processes (69)

- More likely to rank as least important ‘providing water that is safe to drink’ (13% rank 7) and ‘Maintaining good and constant water pressure’ (25% rank 7) compared to all businesses
- Less likely to rank ‘Reducing leakage’ as the least important priority (12% rank 7) than all customers.

R1 Here are some initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 7, the least important to you.? Base: Business (502)

Ranking Exercise Results

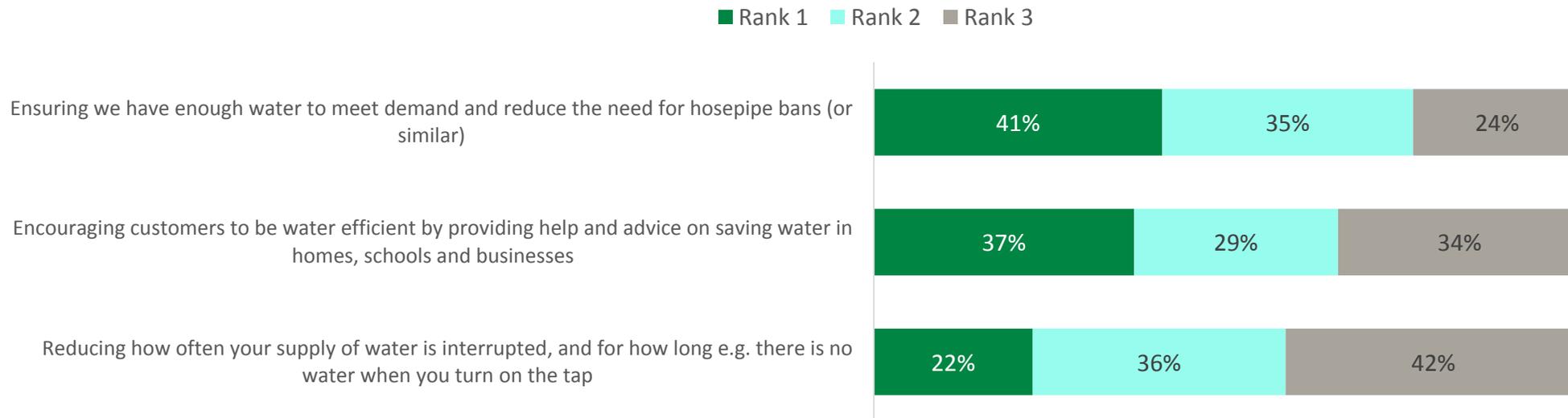
# Water Demand Priorities



# Water Demand Priorities – All Household Customers

**‘Ensuring there is enough water to meet demand’ and ‘reduce the need for hosepipe bans’ were the most important priority for Household Customers.**

Reducing ‘how often the supply is interrupted’ was the less important Water Demand Priority.



‘Ensuring we have enough water to meet demand, I would assume should be a given really for them as an organization.’ (Vulnerable)  
(Deliberative Event)

R2 Here are some water demand initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 3, the least important to you. Base: Household Total (2,604)



# Water Demand Priorities – Household Customers

All Household Customer groups said that ‘having enough water to meet demand’ was the most important priority. However, Future customers ranked ‘encouraging water efficiency’ as the most important priority.

Reducing ‘how often supply is interrupted’ was the least important for all customer groups.

	All Household		Household (General Population)		Low Income		Vulnerable		Future Bill Payers		Digitally Excluded	
n	2,604		1,264		504		511		234		91	
	Rank 1 Most important	Rank 3 Least important	Rank 1 Most important	Rank 3 Least important	Rank 1 Most important	Rank 3 Least important	Rank 1 Most important	Rank 3 Least important	Rank 1 Most important	Rank 3 Least important	Rank 1 Most important	Rank 3 Least important
Ensuring we have enough water to meet demand and reduce the need for hosepipe bans (or similar)	41%	24%	40%	25%	45%	22%	44%	22%	21%	28%	43%	20%
Encouraging customers to be water efficient by providing help and advice on saving water in homes, schools and businesses	37%	34%	37%	35%	35%	34%	35%	36%	41%	32%	40%	34%
Reducing how often your supply of water is interrupted, and for how long e.g. there is no water when you turn on the tap	22%	42%	22%	41%	21%	44%	21%	42%	26%	40%	18%	46%

‘Because it’s [ensuring we have enough water..] actually getting the water into your home. You can encourage customers to save water, but if you have no water to begin with, that’s more important.’ (Household) (Deliberative Event)

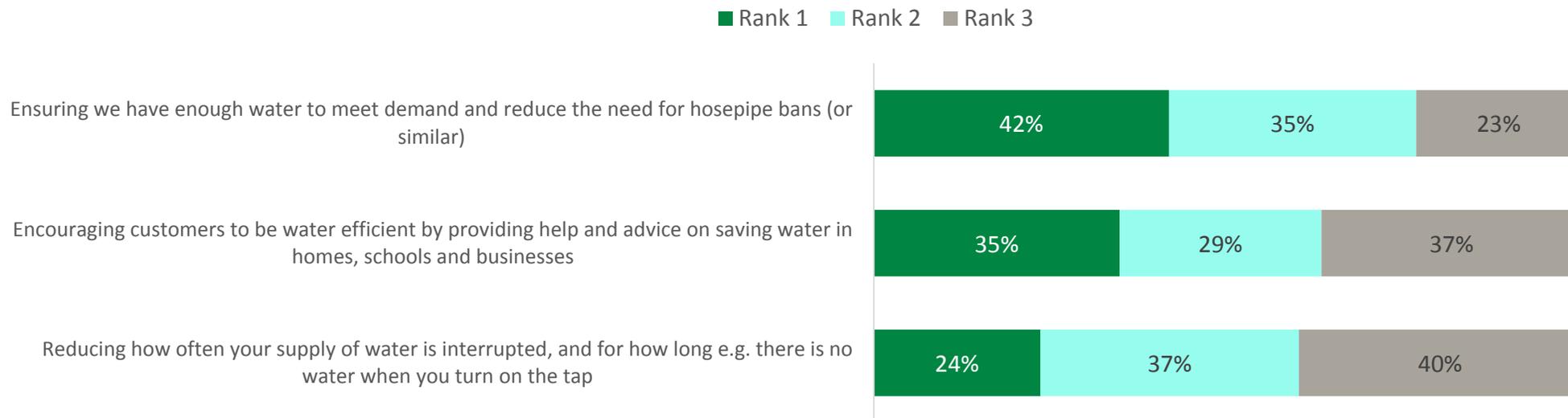
R2 Here are some water demand initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 3, the least important to you. Base: Household Total (2,604) Household General Population (1,264); Low Income (504); Vulnerable (511); Future Bill Payers (234); Digitally Excluded (91)



# Water Demand Priorities – Business Customers

Like Household Customers, ‘ensuring there is enough water to meet demand’ and ‘reduce the need for hosepipe bans’ were also the most important to Business Customers.

‘Reducing how often supply is interrupted’ was therefore the least important priority.



‘[Safe water] it’s fundamental... need a consistent water flow source for us all, but affordability comes hand in hand with that’ (Business customer) (Deliberative Event)

R2 Here are some water demand initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 3, the least important to you. Base: Business (502)

Ranking Exercise Results

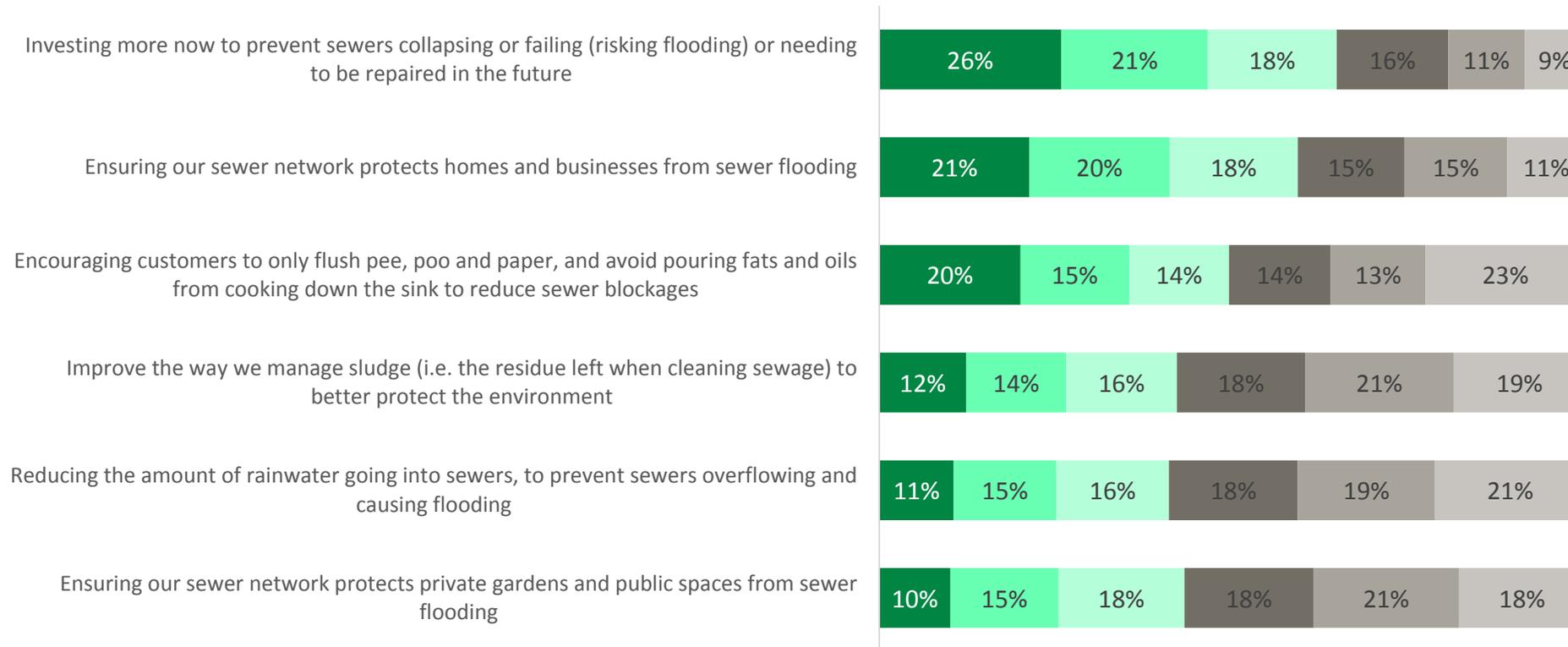
# Wastewater Priorities



# Wastewater Priorities – All Household Customers

**‘Investing more now to prevent future collapsing or failure of sewers was the most important wastewater priority for Household Customers. The second most important priority was ‘ensuring that the sewer network protects homes and businesses’.**

■ Rank 1 ■ Rank 2 ■ Rank 3 ■ Rank 4 ■ Rank 5 ■ Rank 6



‘I think it’s all important, but... if there was ways of reducing the amount of rain waters going into the sewers would help a lot of people.’  
(Household)  
(Deliberative Event)

‘I wasn’t aware that was a problem, rain water going into sewers and then creating a flood from that, I didn’t realise, actually, that was something that really happened’  
(Household) (Deliberative Event)

R3 Here are some wastewater initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 6, the least important to you.. Base: Household Total (2,604)

# Wastewater Priorities – Household Customers



Most Household Customers saw ‘encouraging customers to flush the 3Ps’ as the least important. This implies that some customers do not make the link between flooding and blockages caused by improper disposal of products.

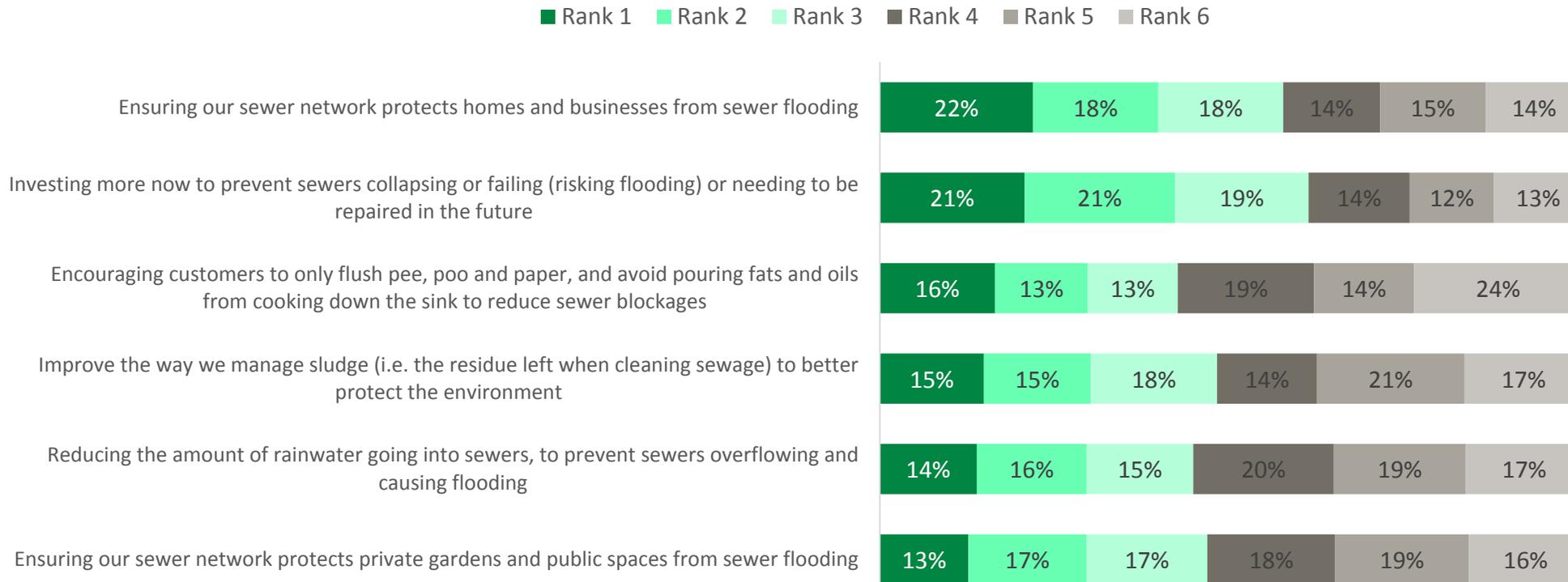
Vulnerable Customers placed more importance on ‘ensuring our sewer network protects homes and businesses from sewer flooding’. Future Bill Payers placed less importance on this, with only 15% ranking this as most important. These differences are statistically significant for Vulnerable and Future Bill Payers when compared against the General Household Population.

	All Household		Household (General Population)		Low Income		Vulnerable		Future Bill Payers		Digitally Excluded	
n	2,604		1,264		504		511		234		91	
	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important
Investing more now to prevent sewers collapsing or failing (risking flooding) or needing to be repaired in the future	26%	9%	26%	8%	25%	9%	27%	8%	23%	14%	30%	11%
Ensuring our sewer network protects homes and businesses from sewer flooding	21%	11%	<b>21%</b>	11%	19%	13%	<b>27%</b>	8%	<b>15%</b>	11%	18%	14%
Encouraging customers to only flush pee, poo and paper, and avoid pouring fats and oils from cooking down the sink to reduce sewer blockages	20%	23%	19%	<b>23%</b>	22%	20%	19%	25%	21%	23%	29%	11%
Improve the way we manage sludge (i.e. the residue left when cleaning sewage) to better protect the environment	12%	19%	13%	20%	12%	16%	8%	22%	20%	12%	7%	21%
Reducing the amount of rainwater going into sewers, to prevent sewers overflowing and causing flooding	11%	21%	11%	22%	11%	21%	9%	21%	10%	18%	10%	25%
Ensuring our sewer network protects private gardens and public spaces from sewer flooding	10%	18%	10%	17%	12%	20%	10%	17%	11%	23%	8%	18%



# Wastewater Priorities – Business Customers

‘Ensuring the sewer network protects homes and business from sewer flooding’ is the most important factor to Business Customers, following ‘investing to prevent sewer collapse’.



### Businesses who use water for manufacturing processes (69)

- Less likely to rank ‘Ensuring our sewer network protects homes and business from sewer flooding’ (6%) as the lowest wastewater priority than all businesses
- More likely to rank ‘Improve the way we manage sludge’ (29% rank 1) as the most important priority than all businesses



### Insight spotlight

Of the wastewater priorities, general household customers and business customers ranked flooding highly. Business customers are more focused on flooding now, while household customers prioritise preventative action to avoid future flooding.

R3 Here are some wastewater initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 6, the least important to you.. Base: Business (502)

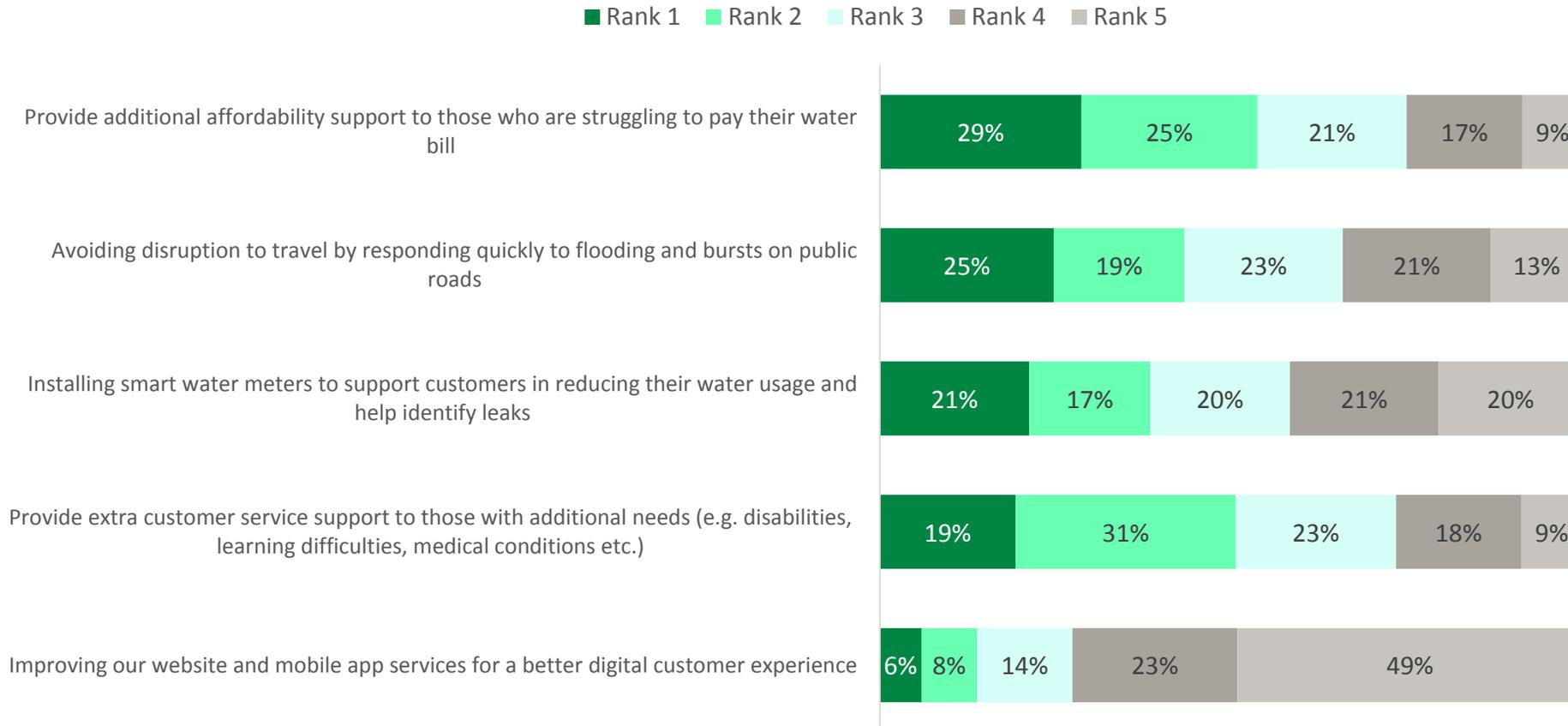
Ranking Exercise Results

# Customer Service Priorities



# Customer Service Priorities – All Household Customers

‘Providing additional affordability support’ was the most important to Household Customers.



‘These all come down to emergencies versus nice to have’s, I think. So, the emergencies would be the most important.’ (Household) (Deliberative Event)

Customers with a water meter (1,074) were more likely to rank ‘**Installing smart meter**’ as the most important (31%) than customers without a water meter (1,401) (14%)

Customers with a water meter (1,074) were less likely to rank ‘**provide additional affordability support to those who are struggling to pay their water bill**’ as the most important (22%) than customers without a water meter (1,401) (33%)

R4 Here are some customer service initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 5, the least important to you. Base: Household Total (2,604)



# Customer Service Priorities – Household Customers

General Household Customers, Low Income, Future Bill Payers and Digitally Excluded Customers saw ‘provide additional affordability support to those who are struggling to pay their water bill’ as most important.

‘Avoiding disruption to travel’ was the most important for Vulnerable Customers, but when this was tested against 17 other statements in the max diff, it was the 2<sup>nd</sup> least important out of the 18.

All Household Customers thought ‘having a better digital experience’ was the least important.

	All Household		Household (General Population)		Low Income		Vulnerable		Future Bill Payers		Digitally Excluded	
n	2,604		1,264		504		511		234		91	
	Rank 1 Most important	Rank 5 Least important	Rank 1 Most important	Rank 5 Least important	Rank 1 Most important	Rank 5 Least important	Rank 1 Most important	Rank 5 Least important	Rank 1 Most important	Rank 5 Least important	Rank 1 Most important	Rank 5 Least important
Provide additional affordability support to those who are struggling to pay their water bill	29%	9%	29%	9%	33%	8%	23%	9%	32%	8%	34%	7%
Avoiding disruption to travel by responding quickly to flooding and bursts on public roads	25%	13%	26%	13%	20%	15%	29%	11%	23%	15%	18%	8%
Installing smart water meters to support customers in reducing their water usage and help identify leaks	21%	20%	22%	22%	20%	21%	22%	21%	18%	15%	27%	14%
Provide extra customer service support to those with additional needs (e.g. disabilities, learning difficulties, medical conditions etc.)	19%	9%	18%	10%	21%	9%	22%	6%	17%	11%	19%	2%
Improving our website and mobile app services for a better digital customer experience	6%	49%	6%	46%	6%	47%	4%	54%	11%	51%	2%	69%

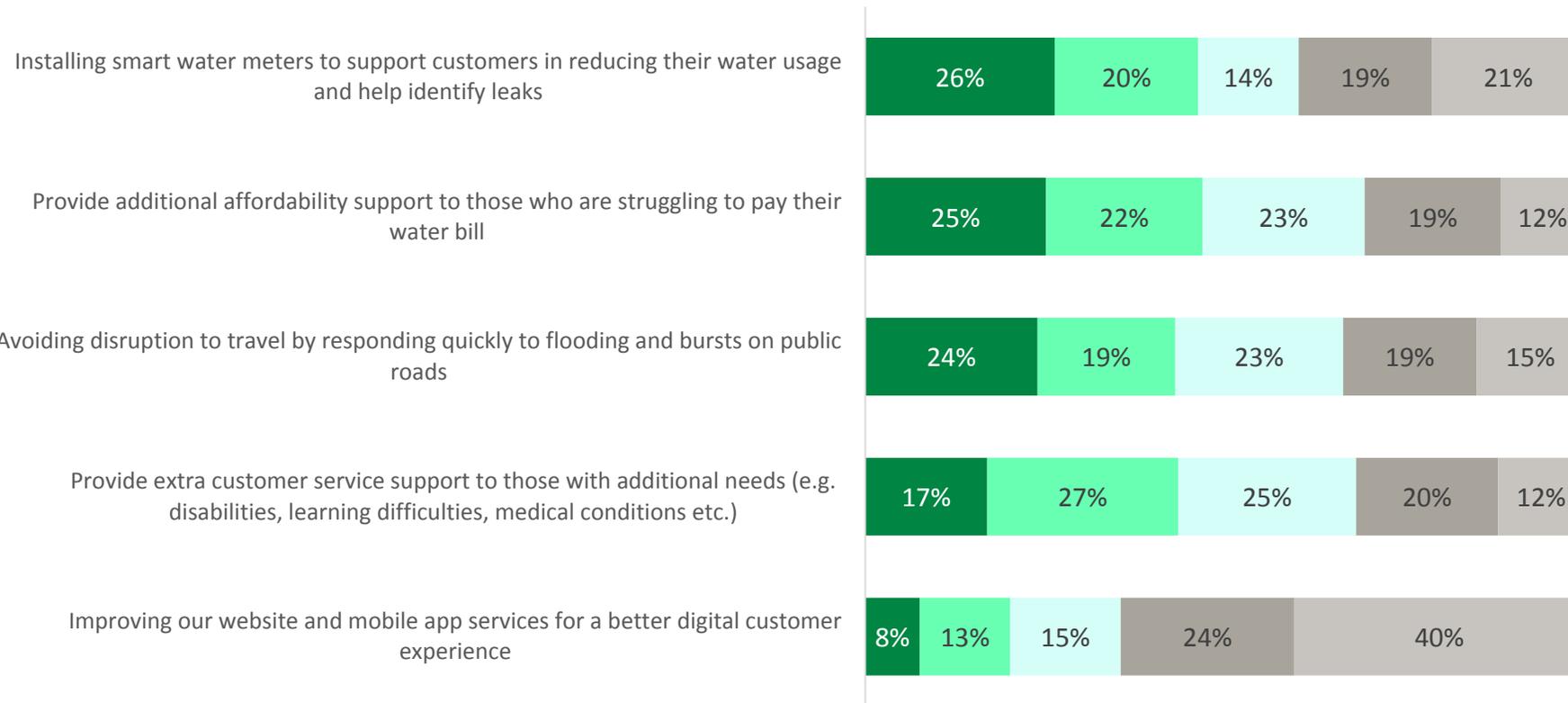
R4 Here are some customer service initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 5, the least important to you. Base: Household Total (2,604) Household General Population (1,264); Low Income (504); Vulnerable (511); Future Bill Payers (234); Digitally Excluded (91)

‘The website and mobile app services for me is probably not a high priority, really. I’d say its more of a nice-to-do when the other priorities have been sorted.’ (Vulnerable) (Deliberative Event)

# Customer Service Priorities – Business Customers

‘Installing smart meters’ was the most important to business customers at 26%, followed closely by ‘affordability support’ at 25%. ‘Avoiding disruption to travel’ was the 3<sup>rd</sup> most important priority in this area, at 24%, whereas in the max diff (covering all areas), this was 17<sup>th</sup> most important out of all 18 tested.

■ Rank 1 ■ Rank 2 ■ Rank 3 ■ Rank 4 ■ Rank 5



## Businesses who use water for manufacturing processes

(69)

- Less likely to rank ‘Installing smart meters’ (12%); ‘Avoid disruption to travel’ (12%) and ‘Improving digital experience’ as the lowest (rank 5) customer service priority than all business customers.
- Providing ‘affordability support’ was less important to these customers (23% rank 5)

## Businesses who use water as an ingredient or product

(82)

- Less likely to rank ‘Installing smart meters’ (16%); and ‘Improving digital experience’ (27%) as the lowest (rank 5) customer service priority than all business customers

## Businesses who use water for normal domestic use

(304)

- Less likely to rank ‘Avoiding disruption to travel’ (10%) as the lowest (rank 5) customer service priority than all business customers

Business customers without a water meter (179) put more importance on ‘provide additional affordability support to those who are struggling to pay their bills’ (6% rank 5)

R4 Here are some customer service initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 5, the least important to you. Base: Business (502)

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‘I think with technology if you’re looking at software if they are trying to incentivize you to use less water, it is really easy to make you feel pretty guilty these days by having flash ups with a sad face saying you’ve used more water this month... So I think that would be a good way to help towards the environmental things.’ (Business customer) (Deliberative Event)

Ranking Exercise Results

# Environmental Priorities

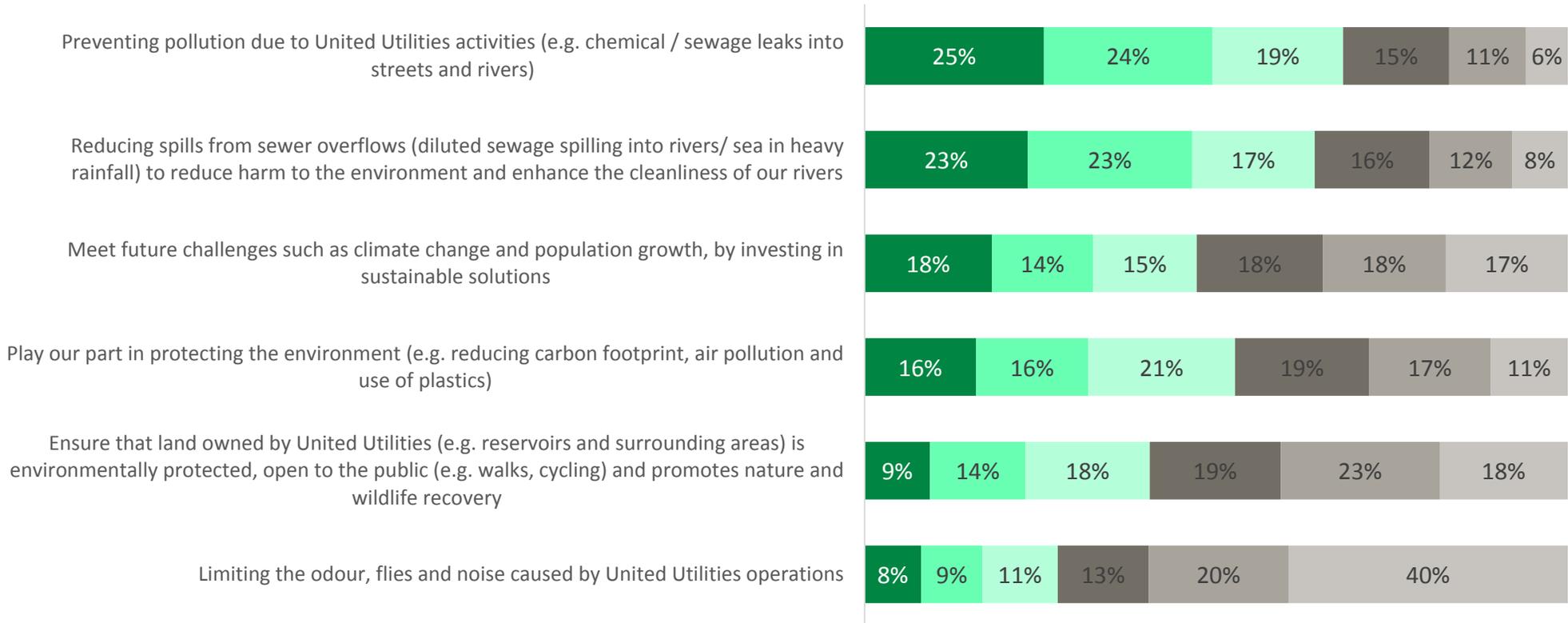


# Environmental Priorities - All Household Customers

‘Preventing pollution due to United Utilities activities’ was the most important for Household Customers, ‘limiting odours’ was the least important.

‘I think preventing pollution is a given.’ (Vulnerable)  
(Deliberative Event)

Rank 1 Rank 2 Rank 3 Rank 4 Rank 5 Rank 6



Customers who live near wastewater treatment works (377) were more likely to rank ‘limiting odour, flies and noise cause by United Utilities operations’ as the most important priority (13%)

R5 Here are some environmental initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 6, the least important to you. Base: Household Total (2,604)



# Environmental Priorities – Household Customers

There were some differences amongst how Household Customer groups rated different environmental priorities.

‘Reducing spills from overflows’ was most important to Low Income Customers, and ‘meeting future challenges’ was most important to Future Bill Payers. ‘Preventing pollution due to United Utilities activities’ is most important for General Household Population and Vulnerable Customers.

	All Household		Household (General Population)		Low Income		Vulnerable		Future Bill Payers		Digitally Excluded	
n	2,604		1,264		504		511		234		91	
	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important	Rank 1 Most important	Rank 6 Least important
Preventing pollution due to United Utilities activities (e.g. chemical / sewage leaks into streets and rivers)	25%	6%	<b>25%</b>	6%	25%	7%	<b>31%</b>	5%	18%	7%	24%	4%
Reducing spills from sewer overflows (diluted sewage spilling into rivers/ sea in heavy rainfall) to reduce harm to the environment and enhance the cleanliness of our rivers	23%	8%	<b>23%</b>	8%	<b>26%</b>	9%	25%	6%	16%	12%	24%	8%
Meet future challenges such as climate change and population growth, by investing in sustainable solutions	18%	17%	<b>17%</b>	18%	17%	20%	19%	16%	<b>24%</b>	13%	15%	18%
Play our part in protecting the environment (e.g. reducing carbon footprint, air pollution and use of plastics)	16%	11%	16%	11%	16%	11%	13%	12%	17%	12%	22%	5%
Ensure that land owned by United Utilities (e.g. reservoirs and surrounding areas) is environmentally protected, open to the public (e.g. walks, cycling) and promotes nature and wildlife recovery	9%	18%	10%	18%	8%	16%	6%	19%	15%	19%	8%	22%
Limiting the odour, flies and noise caused by United Utilities operations	8%	40%	8%	40%	8%	38%	7%	42%	12%	37%	7%	45%

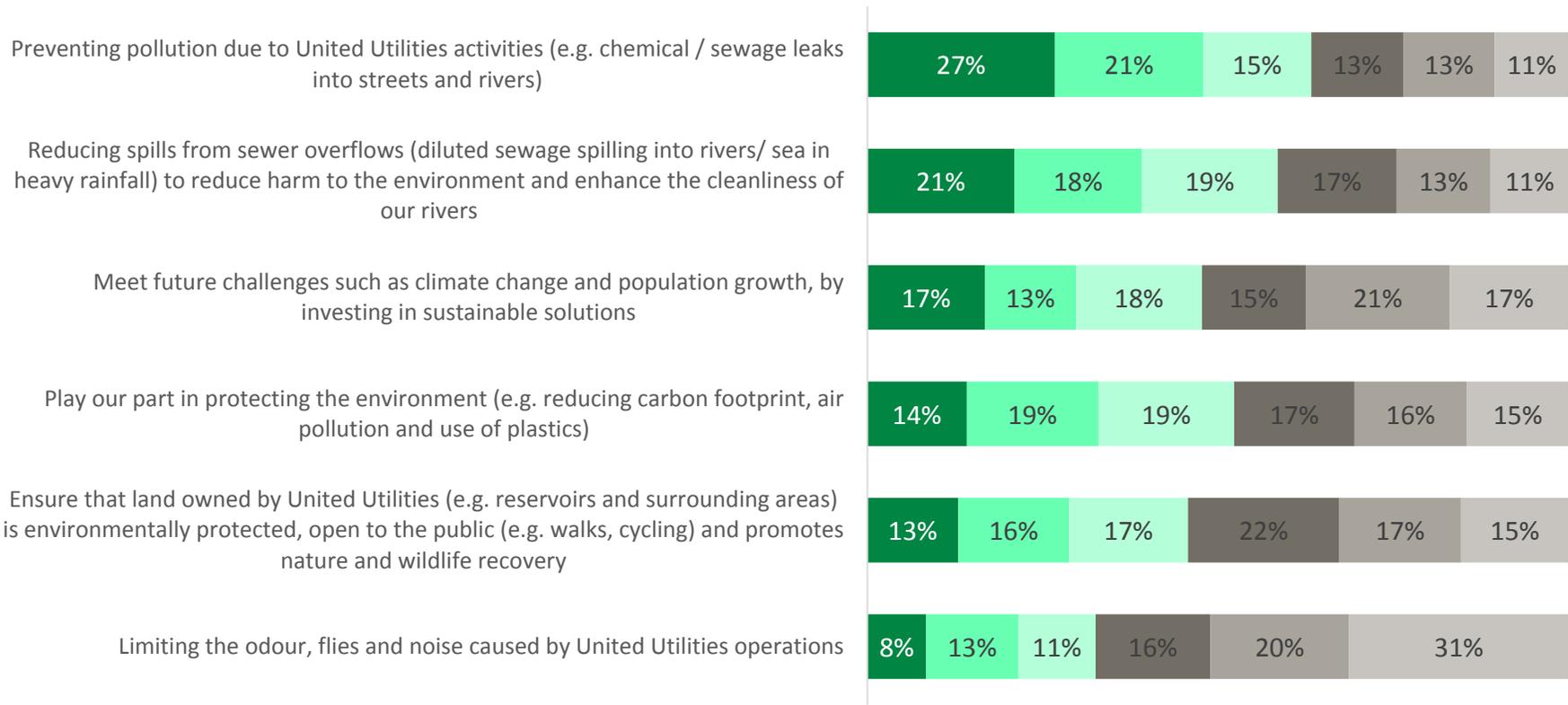
R5 Here are some environmental initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 6, the least important to you. Base: Household Total (2,604) Household General Population (1,264); Low Income (504); Vulnerable (511); Future Bill Payers (234); Digitally Excluded (91)

# Environmental Priorities – Business Customers

Similar to household customers, ‘preventing pollution due to United Utilities activities’ was the most important priority for business customers.

‘Whether the population declines or not, we’ve still got the environmental challenges that we’re facing imminently. I’d like to see that further up the list. If we’re all rowing in the same boat at least we might get there a little bit faster.’ (Business customers)  
(Deliberative Event)

■ Rank 1 ■ Rank 2 ■ Rank 3 ■ Rank 4 ■ Rank 5 ■ Rank 6



### Businesses who use water for manufacturing processes (69)

- More likely to rank ‘**Preventing pollution due to United Utilities activities**’ as the least important (22% rank 6) environmental priority than all business customers
- Less likely to rank ‘**Ensure land owned by United Utilities is environmentally protected, open to the public and promotes nature and wildlife recovery**’ as the lowest priority (6% rank 6) than all business customers

Business customers with a water meter (221) were less likely to rank ‘**Reducing spills from sewer overflows to reduce harm to the environment and enhance cleanliness of river**’ as the most important priority (15% rank 1)

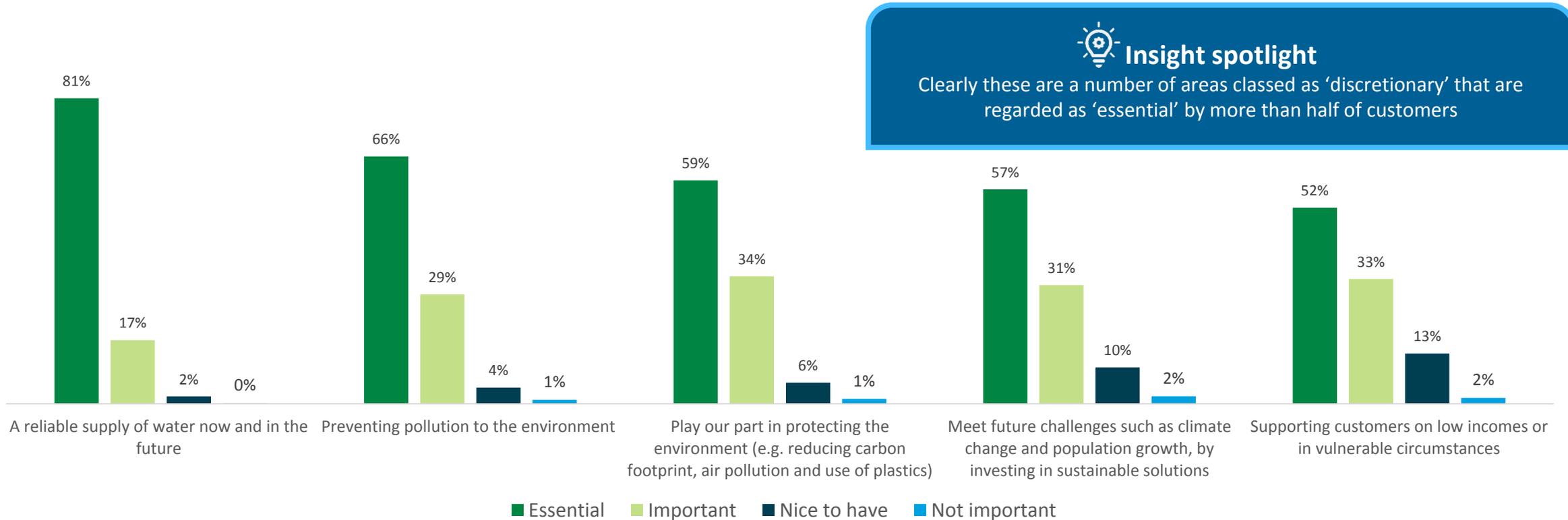
Business customers without a water meter (179) were less likely to rank ‘**Ensure land owned by United Utilities is environmentally protected, open to the public and promotes nature and wildlife recovery**’ as the least important priority (8% rank 6)

R5 Here are some environmental initiatives United Utilities are considering for investment. Please rank the following initiatives in the order of 1, the most important and 6, the least important to you. Base: Business (502)  
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# Priorities seen as Essential by customers

# Top 5 Customer's Essential Priorities - All Customers

Customers were asked to state how essential they thought the more discretionary priorities were following on from the max diff exercise. 'A reliable supply of water now and in the future' was classified as essential by 81% of customers, followed by 'Preventing pollution to the environment' (66%).



**Insight spotlight**  
 Clearly these are a number of areas classed as 'discretionary' that are regarded as 'essential' by more than half of customers

\*Only asked about discretionary priorities

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F1 How would you classify [OUTCOME X] Base: All Customers (813-)

# Top 5 Essential priorities - All Customers

The main reason why Customers considered these 5 priorities the most essential was due to: ‘caring about future generations’; ‘the environment’ and ‘it being best for their community and themselves’.

A reliable supply of water now and in the future	Preventing pollution to the environment	Play our part in protecting the environment	Meet future challenges such as climate change and population growth	Supporting customers on low incomes or in vulnerable circumstances
<b>Essential (n=787)</b>	<b>Essential (n=626)</b>	<b>Essential (n=581)</b>	<b>Essential (n=570)</b>	<b>Essential (n=503)</b>
I care about future generations <b>62%</b>	I care about the environment <b>85%</b>	I care about the environment <b>81%</b>	I care about future generations <b>77%</b>	It's what's best for my community <b>55%</b>
It's what's best for me as a customer <b>42%</b>	I care about future generations <b>67%</b>	I care about future generations <b>77%</b>	I care about the environment <b>73%</b>	It will help me and/or others save money <b>48%</b>
It's what's best for my community <b>41%</b>	It's what's best for my community <b>43%</b>	It's what's best for my community <b>43%</b>	It's what's best for my community <b>43%</b>	It's what's best for me as a customer <b>35%</b>

‘ I would really like to know and I think the public should have a right to know what happens to sludge, what happens currently and what you plan to do. As an environmentalist, that would be an essential thing for me to be thinking about.’  
(Business customer) (Deliberative Event)

‘Its logical I think and I'm glad they do things like protect wildlife, that's important to me.’ (Future) (Deliberative Event)

# Comparison to 2016

# How have priorities changed since 2016? – All Customers

Overall, strength of agreement with the priorities tested in 2016 has increased.

Within this, affordability is now 3rd most important to customers in 2021 compared to 6th in 2016. The needs of vulnerable customers are also placed higher.

	2021		2016	
	Customer Agreement		Customer Agreement	
Providing safe drinking water that is of good quality	1 <sup>st</sup>	85%	←	1 <sup>st</sup> 78%
Providing a reliable, continuous supply of water	2 <sup>nd</sup>	83%	←	1 <sup>st</sup> 78%
Working hard to keep the cost of water as affordable as possible	3 <sup>rd</sup>	77%	←	6 <sup>th</sup> 64% ↑
Providing reliable and continuous sewerage removal and processing services	4 <sup>th</sup>	74%	←	3 <sup>rd</sup> 74%
Ensuring that the water needs of customers in vulnerable circumstances are met	5 <sup>th</sup>	71%	←	7 <sup>th</sup> 62% ↑
Making sure the impact of the operation on the environment is kept to a minimum	6 <sup>th</sup>	69%	←	4 <sup>th</sup> 66%
Taking good care of the land and reservoirs that they own and manage	7 <sup>th</sup>	68%	←	8 <sup>th</sup> 61% ↑
Providing good quality customer service	8 <sup>th</sup>	66%	←	5 <sup>th</sup> 65%
Keeping people informed about the way water is provided and recycled	9 <sup>th</sup>	49%	←	9 <sup>th</sup> 49%
Supporting communities (e.g. access to recreational land, partnerships with community)	10 <sup>th</sup>	43%	←	10 <sup>th</sup> 38%
Providing recreational activities that could take place on the land and reservoirs they own	11 <sup>th</sup>	35%	←	11 <sup>th</sup> 31%

The small green arrows indicate the factors that have been rated as notably more important in 2021 than in 2016.

# Value of Priorities



# The value of priorities for Household Customers

A simple bill payment question was included at the end of the questionnaire, to measure the general overall value of the priorities presented to Customers. The result in £ is only an indication of general value, not an indication of Customers' actual willingness to pay.

Household Customers value the investment of the given priorities as much as an increase of £13 on their annual bill. The value is highest amongst Vulnerable Customers at £16.



Household General Population £13.43	Vulnerable £16.05 (older population and high income)
Future Bill Payers £9.87	Low income £10.87
Digitally Excluded £9.08	

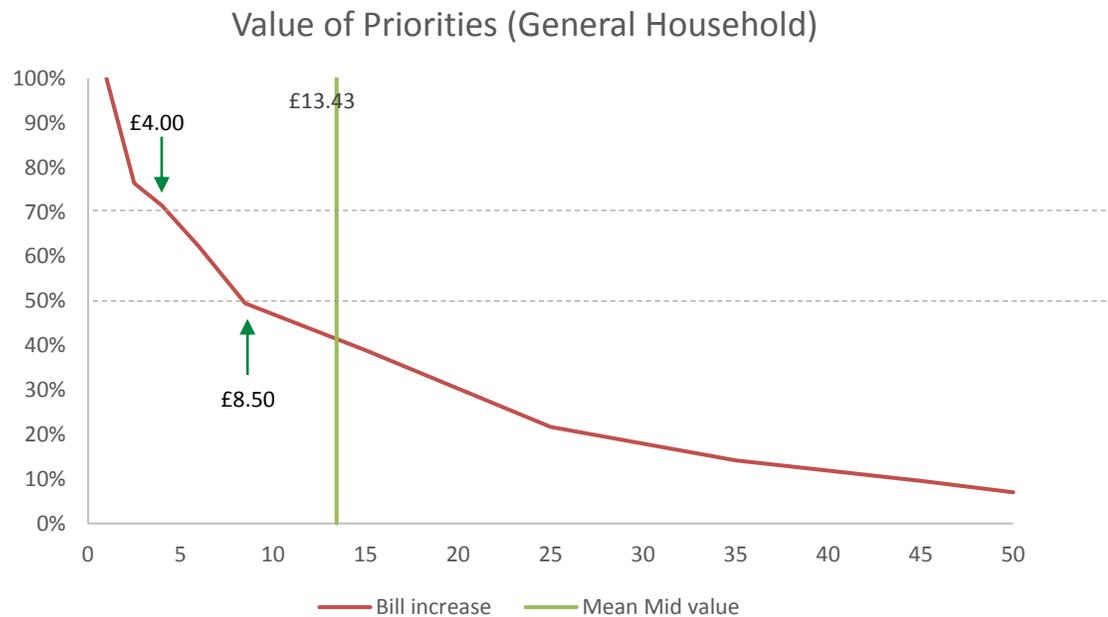
Q VoP How likely would you be to support investment in these areas if your annual bill was to increase by £<RANDOMLY SELECT VALUE FROM TABLE BELOW FROM ITEMS 3 TO 5> to help pay for these investments? This would be in addition to any regular bill increases that may occur over time. Base: All Household (2426); Household general population (1242), Low income (472); Vulnerable (479); Future Bill Payers Bill Payers (233); Digitally Excluded (91)



# The value of priorities for Household Customers (Income Adjusted)

The way customers can express the value of priorities in £ equivalent bill increases will to some extent be constrained by their income. Here we present the same results but with Vulnerable, Future Bill Payers and Low Income Customers adjusted by income (i.e. this is the value if their incomes were equal to the average Household General Population).

The adjustment shows that future bill payers have a value close to the household general population, while low income customers show a very high value – the priorities are particularly important to them.



Household General Population  
£13.43

Vulnerable  
£15.39  
(older population and high income)

Future Bill Payers  
£13.11

Low income  
£32.97

Digitally Excluded  
£15.76

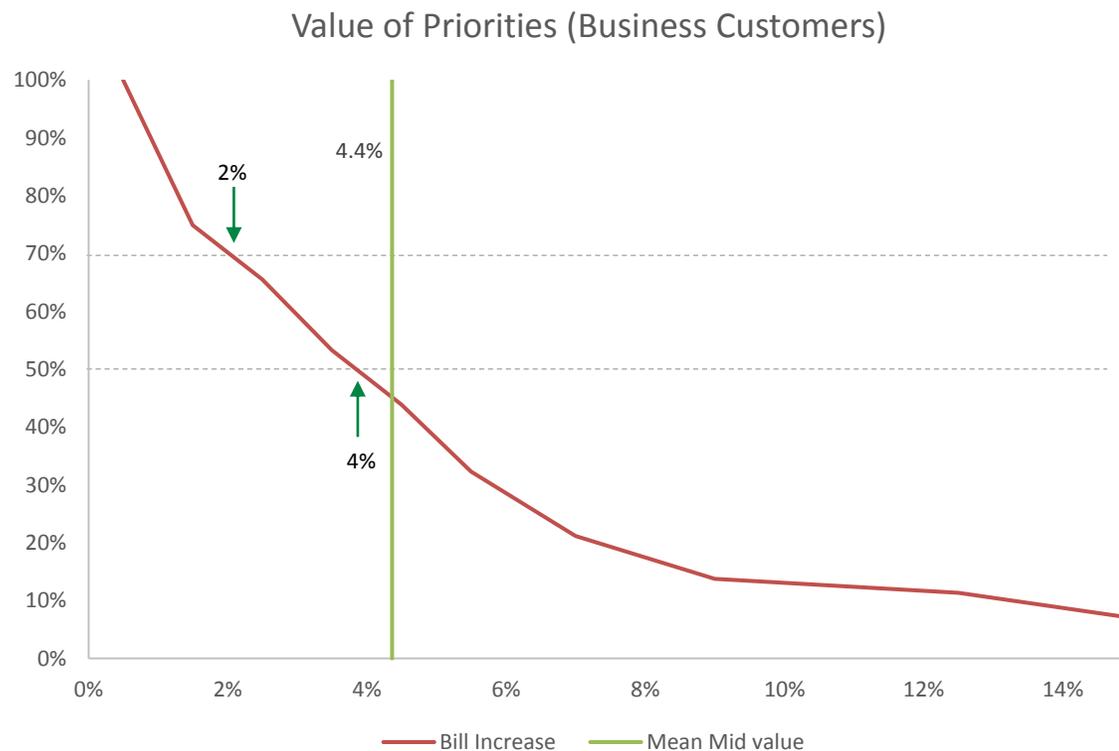
Q VoP How likely would you be to support investment in these areas if your annual bill was to increase by £<RANDOMLY SELECT VALUE FROM TABLE BELOW FROM ITEMS 3 TO 5> to help pay for these investments? This would be in addition to any regular bill increases that may occur over time. Base: All Household (2426); Household general population (1242), Low income (472); Vulnerable (479); Future Bill Payers (233); Digitally Excluded (91)



# The value of priorities for Business Customers

The bill payment question for Business Customers was similar to the one given to Household Customers, except that bill increases were expressed in relation to proportional increases on their bill.

Business customers value the priorities as much as an increase of 4 to 5% on their annual bill.



Q VoP: How likely would you be to support investment in these areas if your annual business bill was to increase by <RANDOMLY SELECT VALUE FROM TABLE BELOW FROM ITEMS 3 TO 5>% to help pay for these investments? This would be in addition to any regular bill increases that may occur over time. Base: Business (458)

# Conclusion of customers' priorities

# Conclusion of customer priorities ( part one of two)

## Environment



All household and business customers felt water safety and provision was most important, but it is a 'hygiene factor' for United Utilities.

Wider environmental impacts related to climate change and protecting the environment were seen as a high priority. Future bill payers prioritized the environment most among the customer groups.

## Affordability support



Supporting customers with low incomes / in vulnerable circumstances was the second highest priority for customers, after the environment.

This was especially true for customers on low incomes and future bill payers.

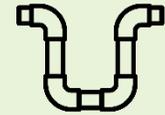
## Leaks



Overall, reducing leakage was seen as a low priority.

Business customers placed a slightly higher priority on this than household customers.

## Flooding



Overall, reducing flooding was seen as a low priority.

Business customers placed this as a slightly higher priority compared to household customers.

# Conclusion of customer priorities (part two of two)

## Environment



Customers said that these priorities mattered because they care about:

- The environment
- Future generations
- Their community.

## Affordability



Customers said that these priorities mattered because:

- It was best for their community
- Would help them / others to save money
- It is what's best for them as consumers.

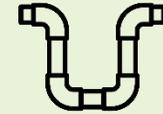
## Leaks



Customers said that this priority mattered less because:

- *There was a lower level of understating as to how United Utilities was responsible for this*
- Business customers indicated that saving water was important.

## Flooding



Customers said that this priority mattered less because:

- *It only affects a few people*
- *They did not see it as problem that needed solving*

Those that did see this as important indicated that they cared about the environment.

# Summary

# Summary

1

Customers were **able to express what their priorities** are and why

3

The **environment is a high priority** for customers. This became either the 2<sup>nd</sup> or 3<sup>rd</sup> most important priority to customers.

2

**Safe water and a continuous supply** were seen as a 'hygiene factor' for United Utilities.

4

**Supporting customers with low incomes / in vulnerable circumstances** were the second most important as a group of priorities, and they mattered most to Future Bill Payers.

# Appendix

# Appendix 1 - Methodology

# Detail of approach

## Phase 1: Qualitative

## Phase 2: Quantitative

## Delivery



Deliberative event:  
collective view

Deliberative events:  
break out groups

Cognitive  
interviews: ensure  
quality

Quantitative survey

Reporting

- **27 customers took part in a 2.5 hour online event**
- Large introductory and feedback sessions with all customers

- **Break out into 4 groups of 6-7 to ensure in-depth insights**
- Respondents grouped by customer type

- To test survey length, comprehension and ease of completion
- Conducting these via zoom allowed us to fully understand ease of completion and quality of user experience

- **3,000 surveys**
- **20 minute survey**
- Anchored Max-diff approach to test all priorities

- Plain English and in a user-friendly format
- Topline summary and final report
- Thematic and sub-group analysis
- Conclusions and recommendations

# Cognitive Interviews: Findings

We conducted 5 cognitive interviews via the online platform Zoom on 21<sup>st</sup> and 22<sup>nd</sup> October. 3 were with household customers and 2 with business customers.

Customers completed the survey via an online link to test understanding of information, usability, ability to rate the priority areas and the time taken to complete it.

## What customers found difficult in the survey

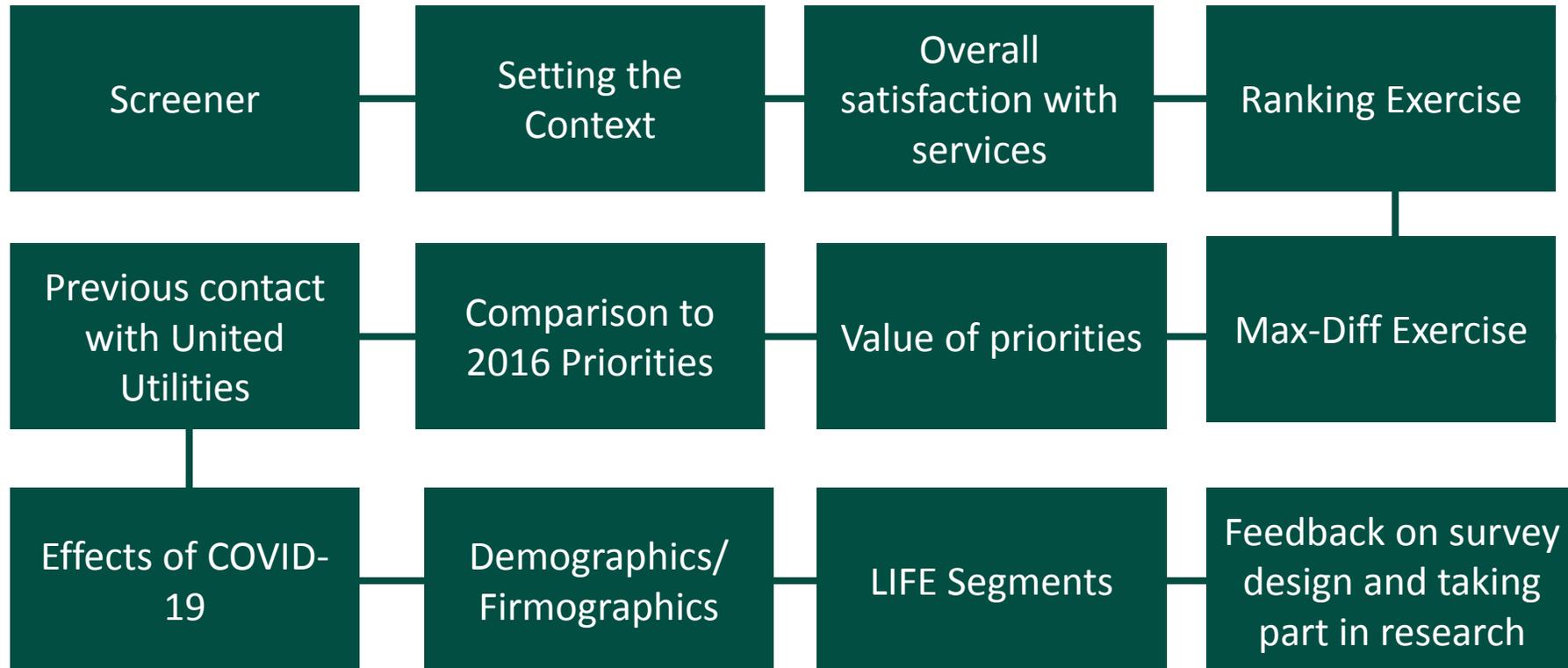
- Dates were not clear (2025-2030)
- The ranking and max-diff exercise were a little repetitive
- Some business customers would think about their home at times
- Respondents completed the survey between 18 and 27 minutes

## Improvements made

- Extra instruction to the max-diff exercise to pre-warn customers that they may see the same outcomes more than once
- Numbering of the ranking and max-diff exercise to communicate progress
- Extra reminders were added to the business customer survey to remind customers they needed to think about their business

# Questionnaire content

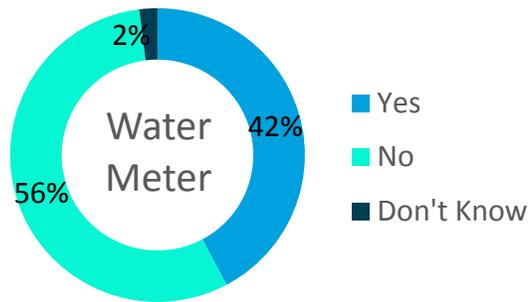
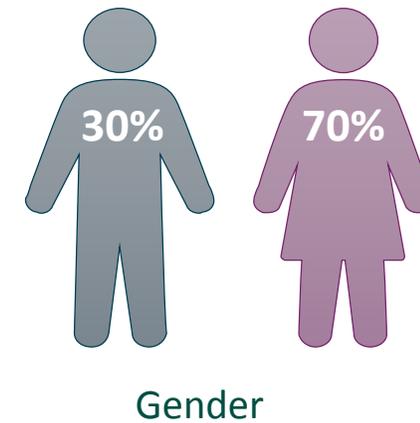
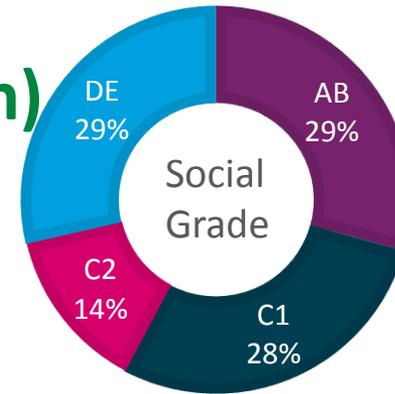
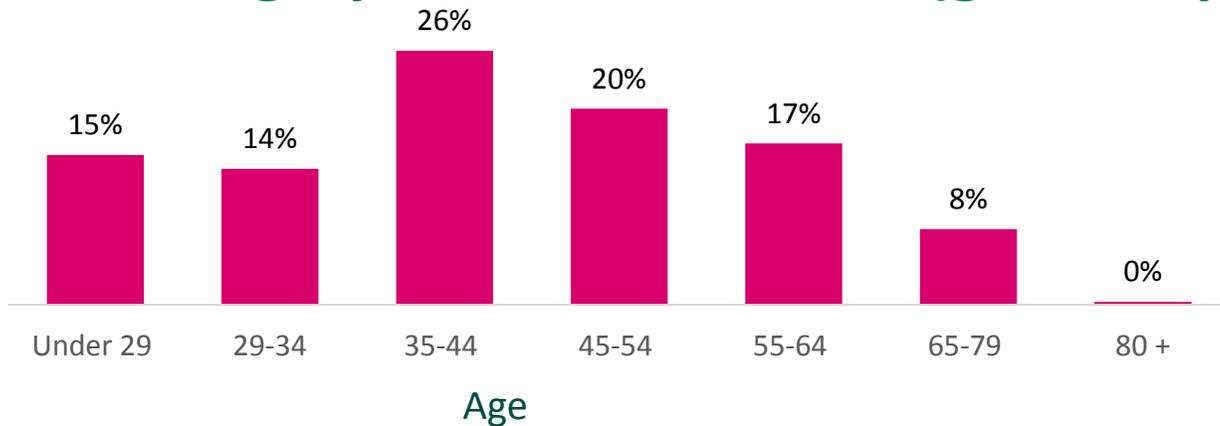
The flow chart below sets out the sections that were included in the quantitative survey.



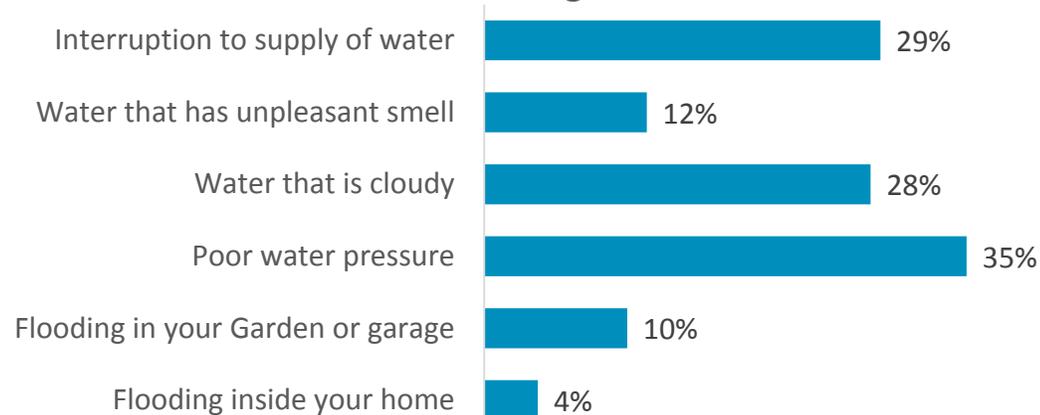
# Appendix 2 - Survey Demographics



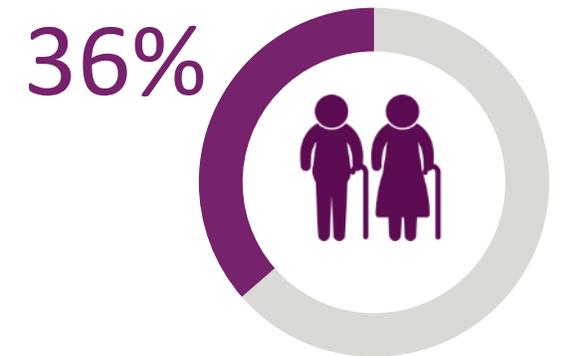
# Demographics – Household (general population)



## Those who have experienced the following



## Vulnerable customers



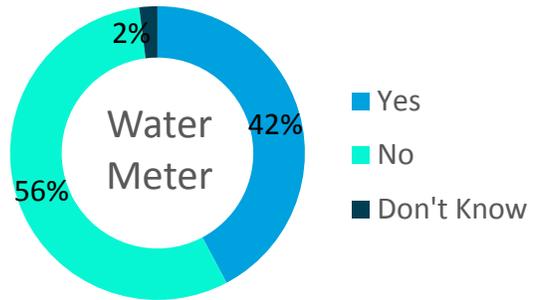
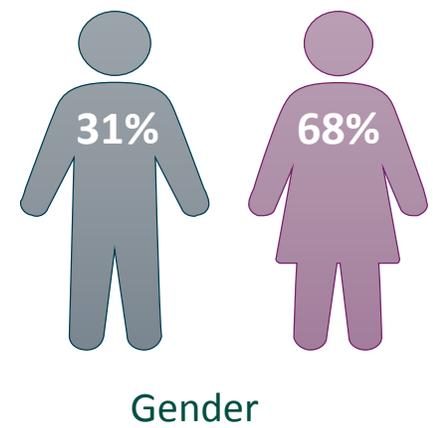
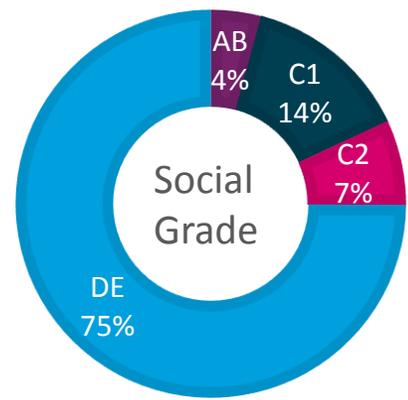
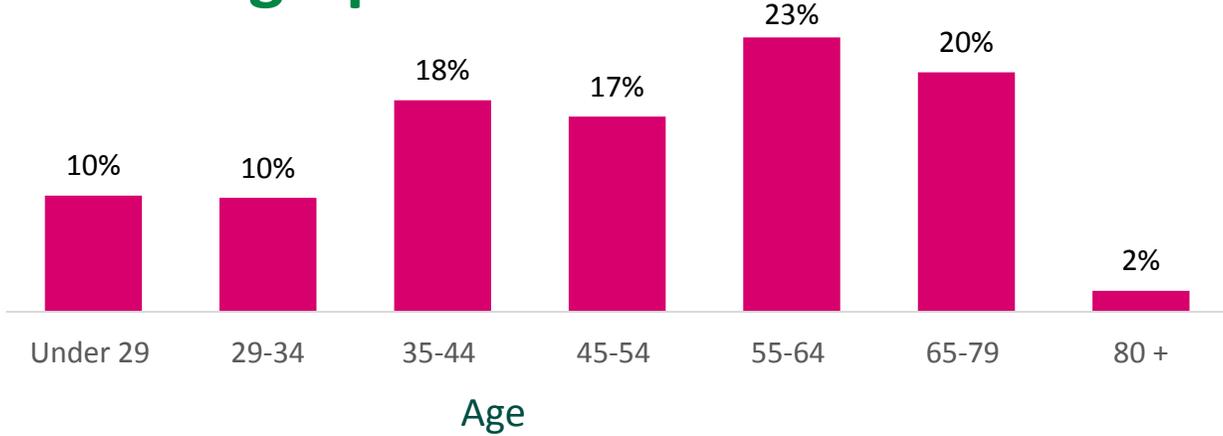
9% Registered on the PSM



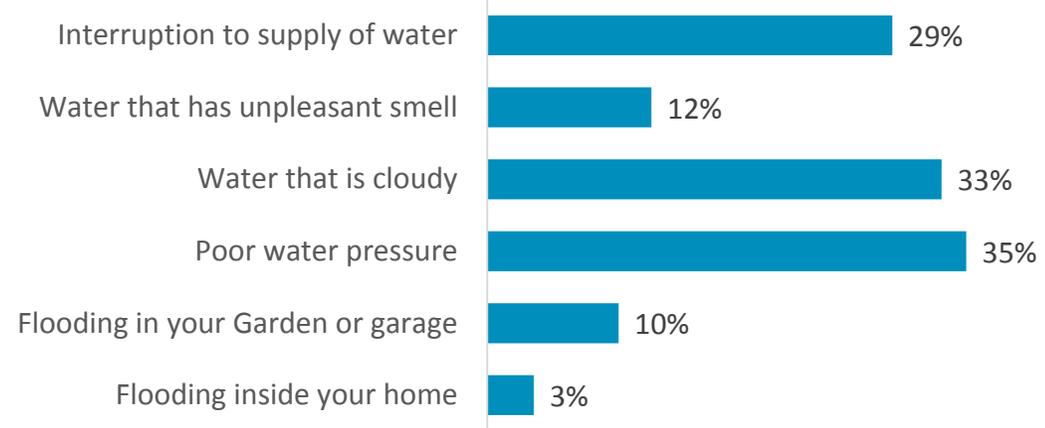
S8 What is your gender? Base: Household general population (1264). S9 What is your age? Base: Household general population (1264). S12 There are a wide range of factors that could mean anyone might need extra help or support. Base: Household general population (1264). S13 Is anyone in your household registered as a Priority Service Member? Base: Household general population (1264). S10 Which of the following categories best describes the employment status of the highest income earner in your household? Base: Household general population (1264). S7A Does your home have a water meter? Base: Household general population (1264). S18 Have you ever experienced any of the following at home? Base: Household general population (1264). C4 Which of the following best describes the area where you live? Base: Household general population (1264).



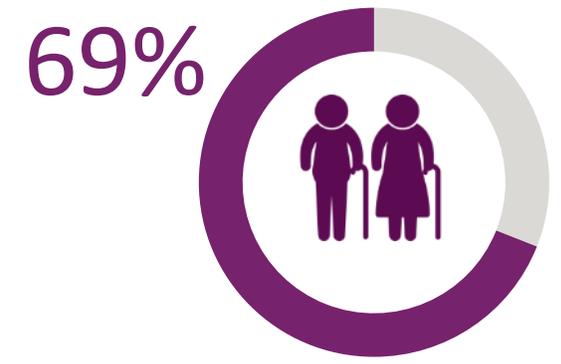
# Demographics – Low Income



## Those who have experienced the following



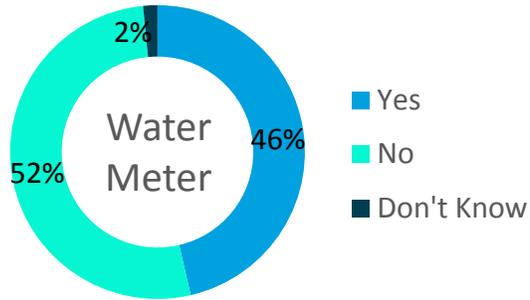
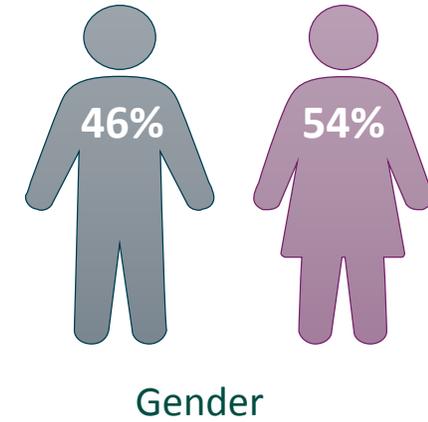
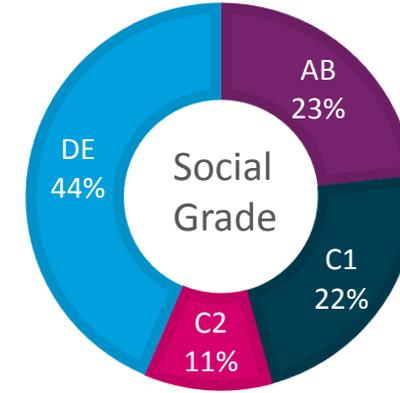
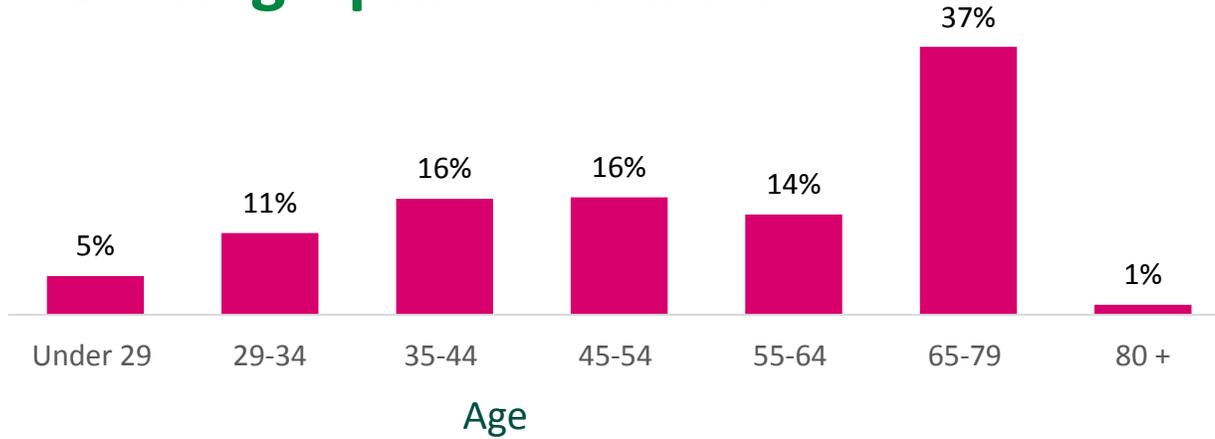
## Vulnerable customers



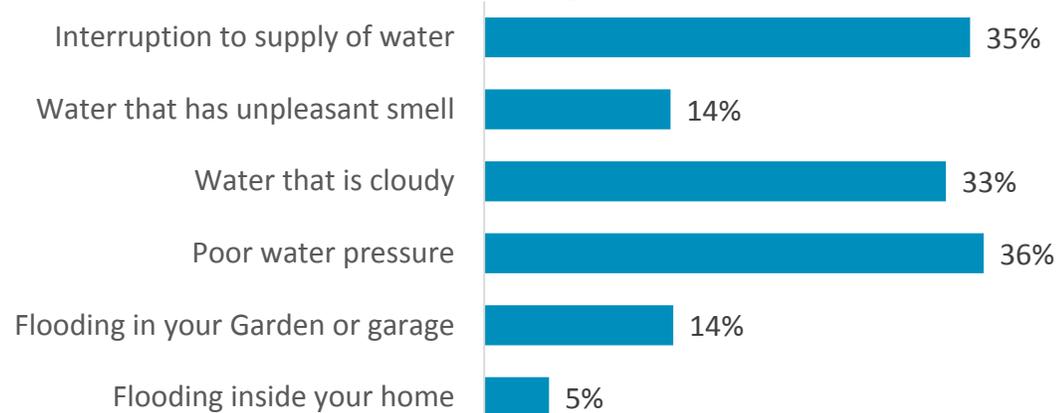
S8 What is your gender? Base: Low Income (504). S9 What is your age? Base: Low Income (504). S12 There are a wide range of factors that could mean anyone might need extra help or support. Base: Low Income (504). S13 Is anyone in your household registered as a Priority Service Member? Base: Low Income (504). S10A Which of the following categories best describes the employment status of the highest income earner in your household? Base: Low Income (504). S7ADoes your home have a water meter? Base: Low Income (504). S18 Have you ever experienced any of the following at home? Base: Low Income (504). C4 Which of the following best describes the area where you live? Base: Low Income (504).



# Demographics – Vulnerable



## Those who have experienced the following



## Vulnerable customers



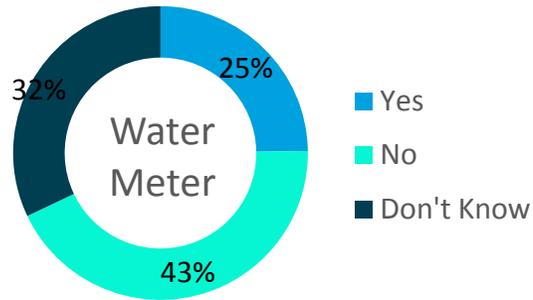
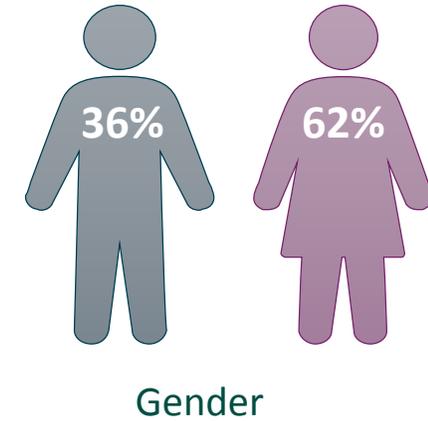
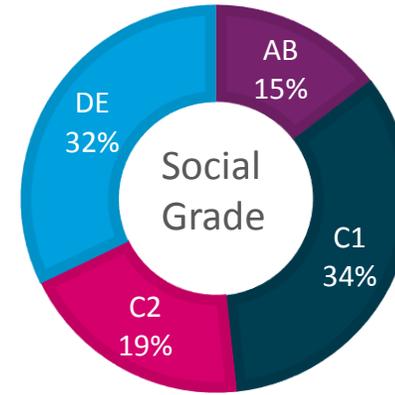
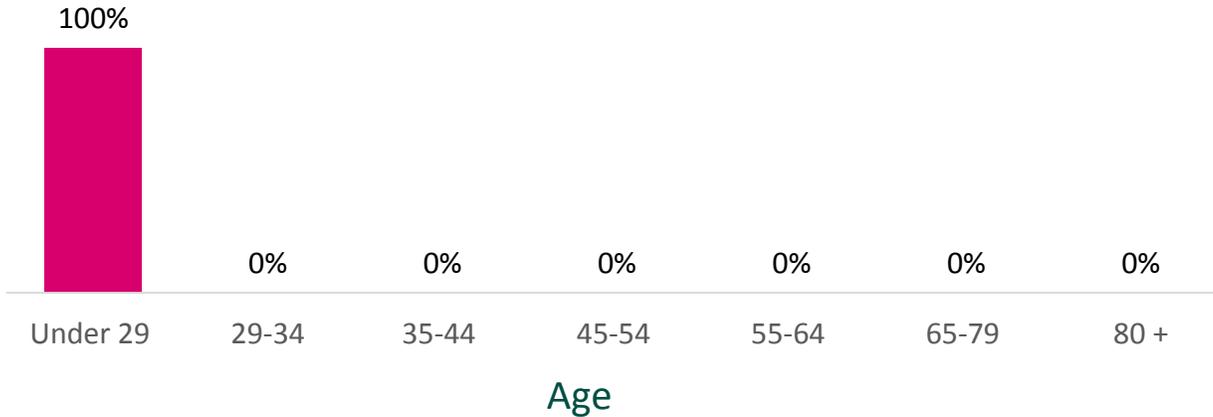
24% Registered on the PSM



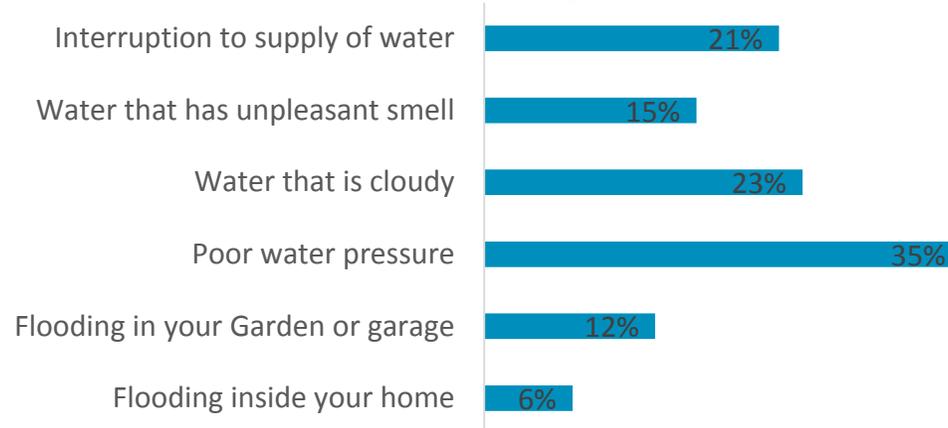
S8 What is your gender? Base: Vulnerable (511). S9 What is your age? Base: Vulnerable (511). S12 There are a wide range of factors that could mean anyone might need extra help or support. Base: Vulnerable (511). S13 Is anyone in your household registered as a Priority Service Member? Base: Vulnerable (511). S10A Which of the following categories best describes the employment status of the highest income earner in your household? Base: Vulnerable (511). S7A Does your home have a water meter? Base: Vulnerable (511). S18 Have you ever experienced any of the following at home? Base: Vulnerable (511). C4 Which of the following best describes the area where you live? Base: Vulnerable (511).



# Demographics – Future Bill Payers



## Those who have experienced the following



## Vulnerable customers

44%



1%

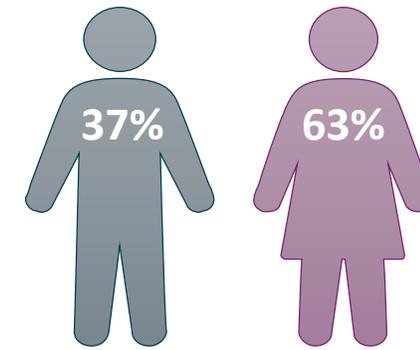
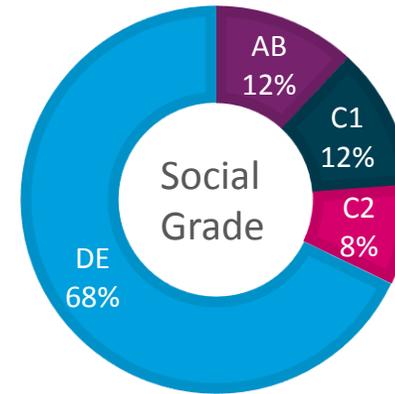
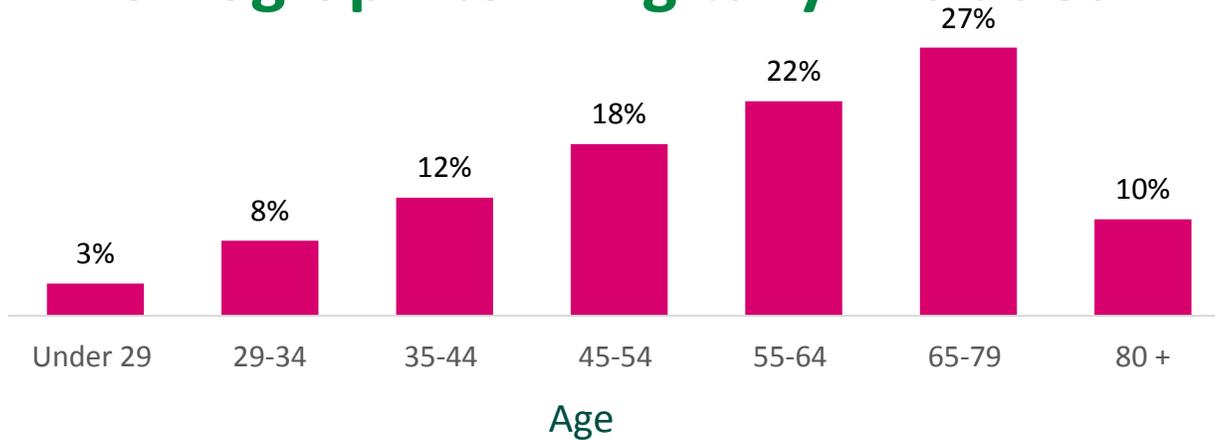
Registered on the PSM



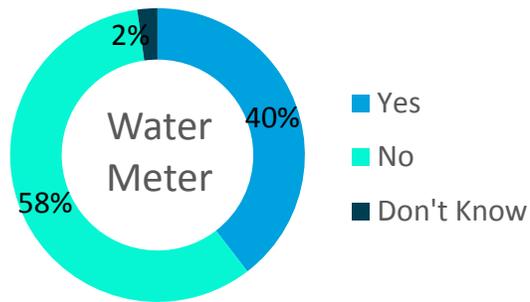
S8 What is your gender? Base: Future Bill Payers (234). S9 What is your age Base: : Future Bill Payers (234). S12 There are a wide range of factors that could mean anyone might need extra help or support. Base: : Future Bill Payers (234). S13 Is anyone in your household registered as a Priority Service Member? Base: : Future Bill Payers (234). S10A Which of the following categories best describes the employment status of the highest income earner in your household? Base: : Future Bill Payers (234). S7ADoes your home have a water meter? Base: : Future Bill Payers (234). S18 Have you ever experienced any of the following at home? Base: : Future Bill Payers (234). C4 Which of the following best describes the area where you live? Base: : Future Bill Payers (234).



# Demographics – Digitally Excluded



Gender

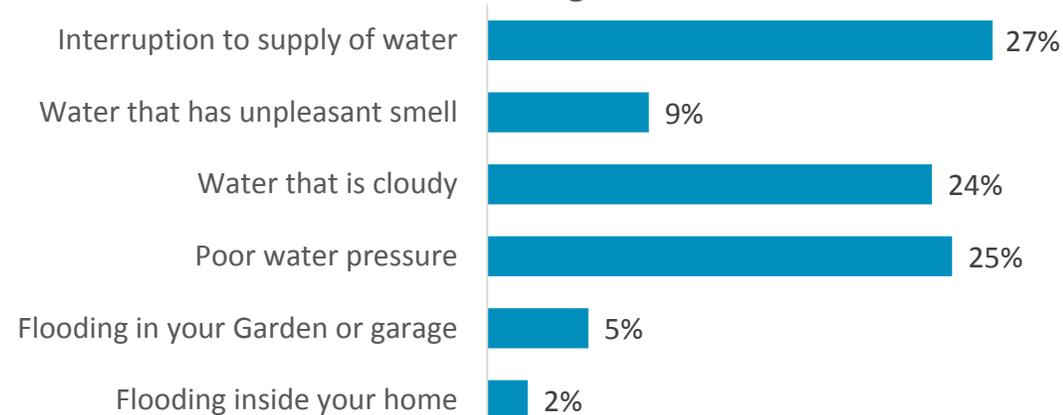


Vulnerable customers

63%



## Those who have experienced the following



10%

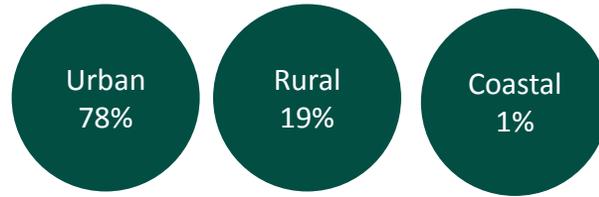
Registered on the PSM



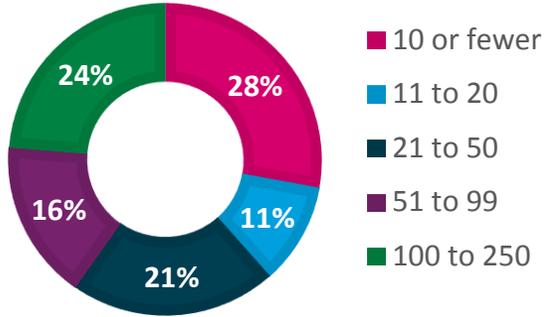
S8 What is your gender? Base: Digitally Excluded (91). S9 What is your age? Base: Digitally Excluded (91). S12 There are a wide range of factors that could mean anyone might need extra help or support. Base: Digitally Excluded (91). S13 Is anyone in your household registered as a Priority Service Member? Base: Digitally Excluded (91). S10A Which of the following categories best describes the employment status of the highest income earner in your household? Base: Digitally Excluded (91). S7ADoes your home have a water meter? Base: Digitally Excluded (91). S18 Have you ever experienced any of the following at home? Base: Digitally Excluded (91). C4 Which of the following best describes the area where you live? Base: Digitally Excluded (91).



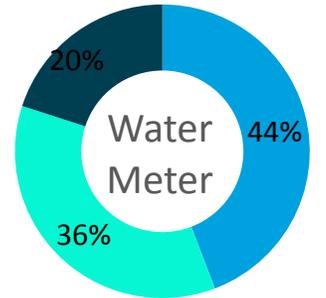
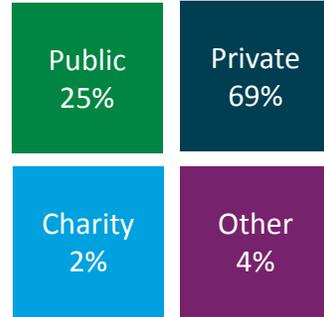
# Demographics – Business Customers



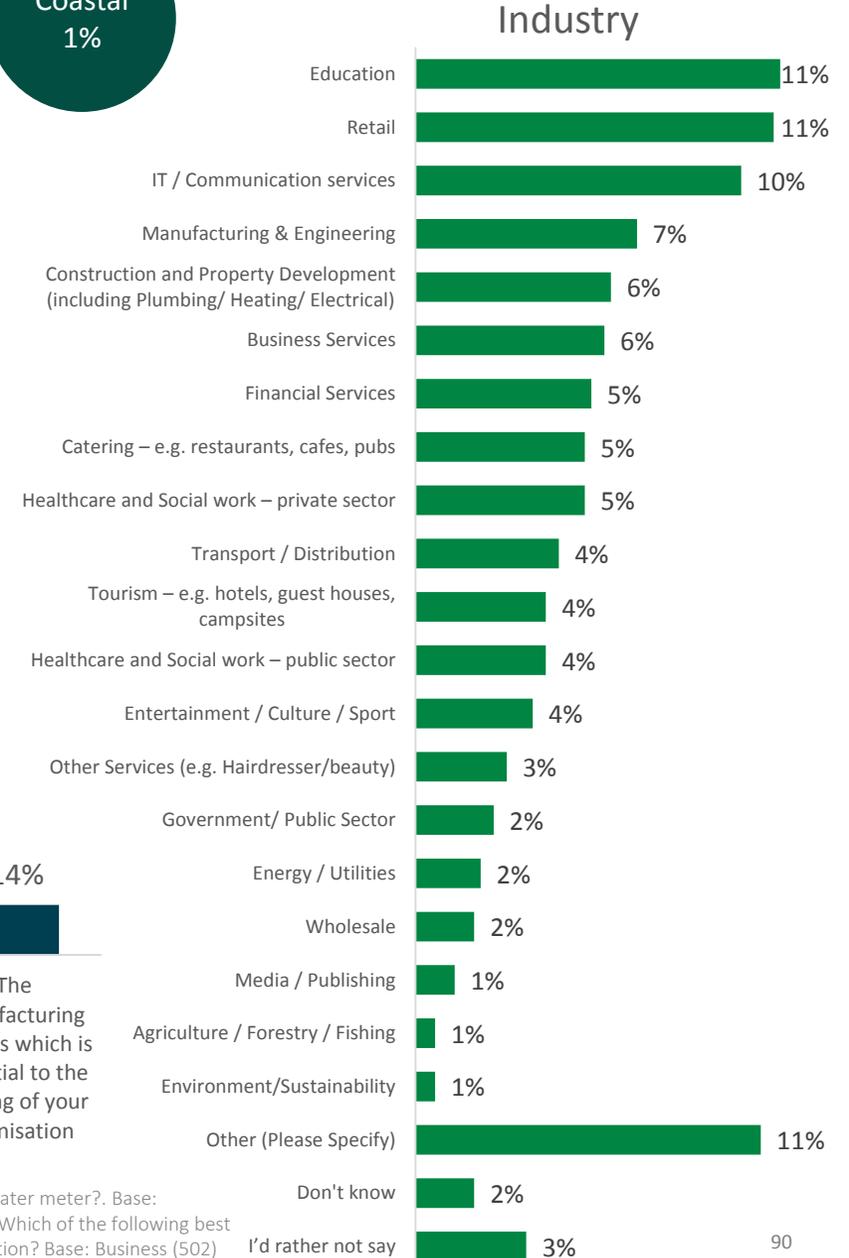
## Business Size



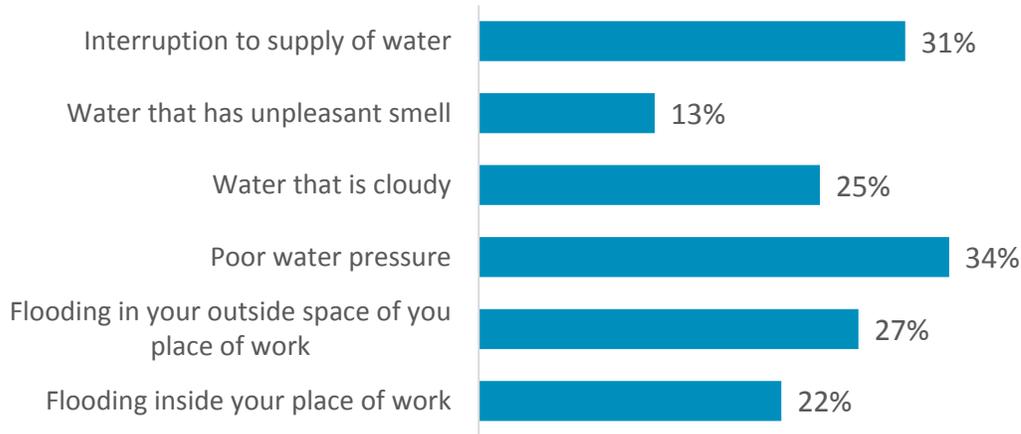
## Sector



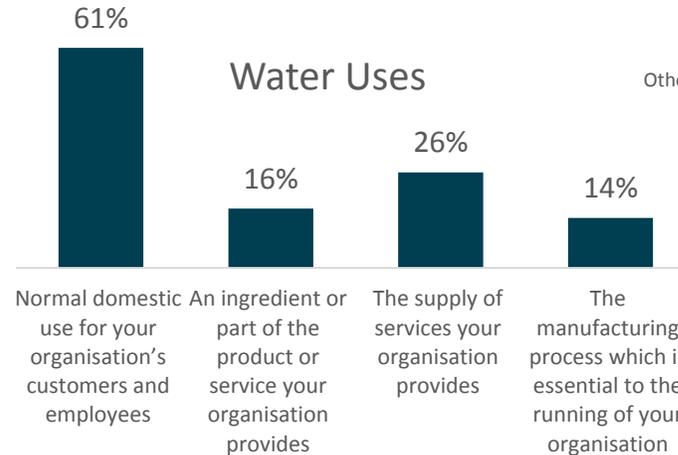
■ Yes ■ No ■ Don't Know



## Those who have experienced the following



## Water Uses



# Appendix 3 - Service Failure Experiences



# Service failure by county – All Customers

Service failures seem to be similar at a county level to the overall occurrence in UU’s area.

The notable exceptions are Cheshire, which had 6% more customers reporting poor water pressure, and Cumbria, which had 5% less respondents reporting water with an unpleasant smell than customers overall.

	Total	Cheshire	Cumbria	Greater Manchester	Lancashire	Merseyside
n	3106	437	190	1133	773	588
Flooding inside your home / place of work	7%	8%	8%	7%	7%	7%
Flooding in your outside space	14%	13%	15%	11%	16%	15%
Poor water pressure	35%	41%	32%	35%	33%	34%
Water that is cloudy	29%	30%	25%	29%	28%	30%
Water that has unpleasant smell	12%	14%	7%	13%	12%	11%
Interruption to supply of water	30%	32%	28%	28%	31%	31%

S18 Have you ever experienced any of the following at home? Base: All Customers (3106).



# Customers who have experienced water service failure– All Customers

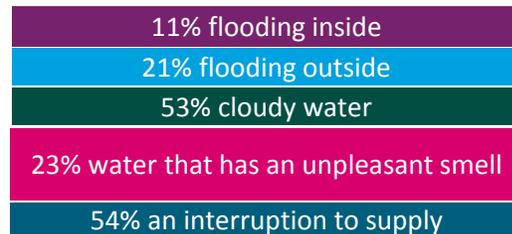
Poor water pressure was the most common service failure with 35% of Customers experiencing it, followed by an interruption to supply at 30% and cloudy water at 29%. 37% of customers experienced more than one service failure. 20 Business and 4 Household Customers experienced all service failures.

Have you ever experienced **poor water pressure**?

**35%**

Said Yes

Also experienced:



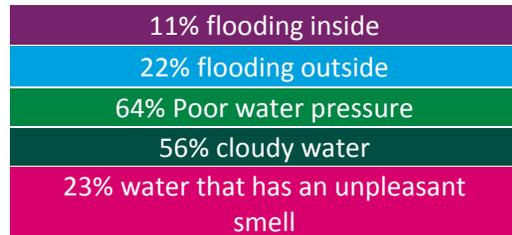
Of the 35% of customers that experienced poor water pressure, 79% also experienced a second service failure, the most common being an interruption to supply.

Have you ever experienced **interruption to supply of water**?

**30%**

Said Yes

Also experienced:



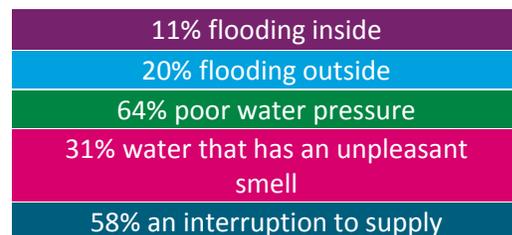
Of the 30% of customers that experienced an interruption to supply, 84% also experienced a second service failure, the most common being poor water pressure.

Have you ever experienced **water that is cloudy**?

**29%**

Said Yes

Also experienced:



Of the 29% of customers that experienced cloudy water, 87% also experienced a second service failure, the most common being poor water pressure.



## Insight spotlight

Those that experienced cloudy water are most likely to experience other service failures.



# Customers who have experienced flooding and unpleasant water smell – All Customers

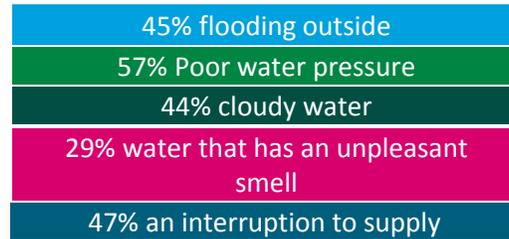
Flooding is experienced by a lower percentage of Customers with 7% inside and 14% outside their home or place of work, compared to water service failures.

Have you ever experienced **flooding inside your home / place of work?**

7%

Said Yes

Also experienced:



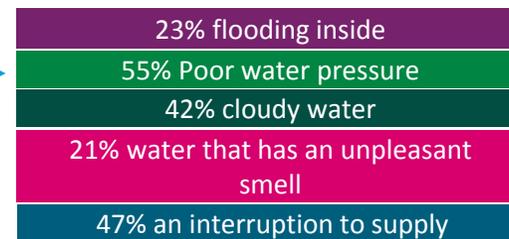
Of the 7% of customers that experienced a flooding inside their home or place of work, 84% also experienced a second service failure, the most common being poor water pressure.

Have you ever experienced **flooding outside your home / place of work?**

14%

Said Yes

Also experienced:



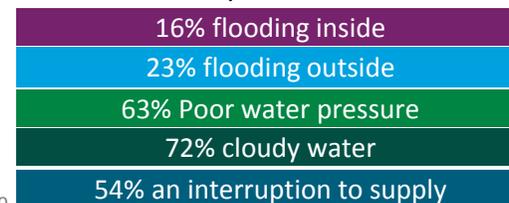
Of the 14% of customers that experienced a flooding outside their home or place of work, 79% also experienced a second service failure, the most common being poor water pressure.

Have you ever experienced **water that has unpleasant smell?**

12%

Said Yes

Also experienced:



Of the 12% of customers that experienced unpleasant smelling water, 91% also experienced a second service failure, the most common being poor water pressure.



# Customers who have experienced the following – All Customers

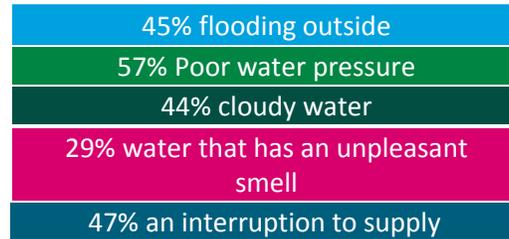
Poor water pressure was the most common problem to occur, followed by an interruption to supply. 20 Business Customers and 4 Household Customers experienced all 6 problems to supply.

Have you ever experienced **flooding inside your home / place of work?**

**7%**

Said Yes

Also experienced:

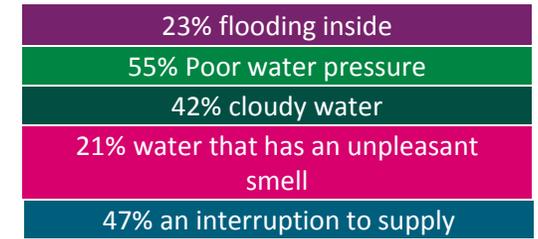


Have you ever experienced **flooding outside your home / place of work?**

**14%**

Said Yes

Also experienced:

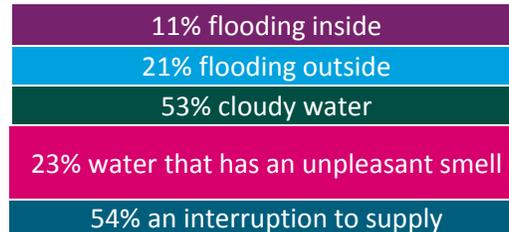


Have you ever experienced **poor water pressure?**

**35%**

Said Yes

Also experienced:

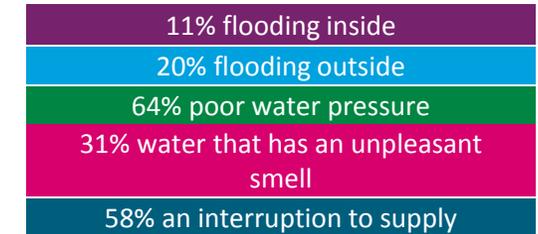


Have you ever experienced **water that is cloudy?**

**29%**

Said Yes

Also experienced:

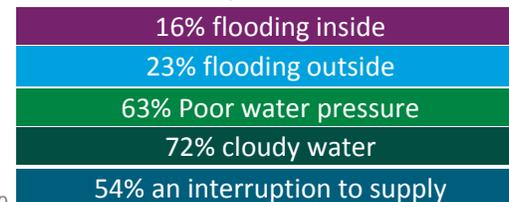


Have you ever experienced **water that has unpleasant smell?**

**12%**

Said Yes

Also experienced:

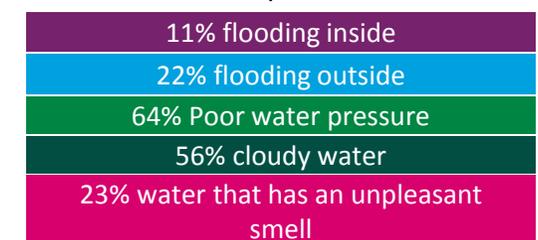


Have you ever experienced **interruption to supply of water?**

**30%**

Said Yes

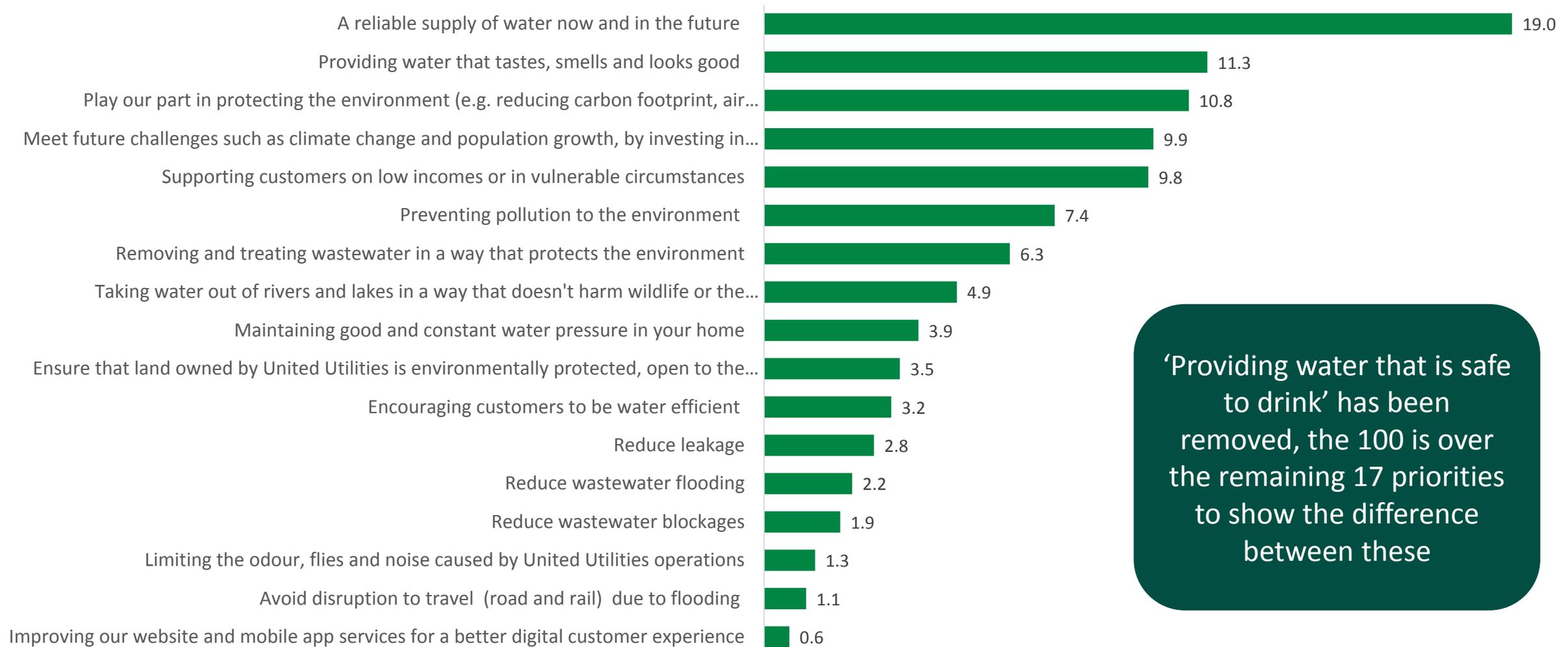
Also experienced:



# Appendix 4 – Max Diff



# All priorities – Household All Customers

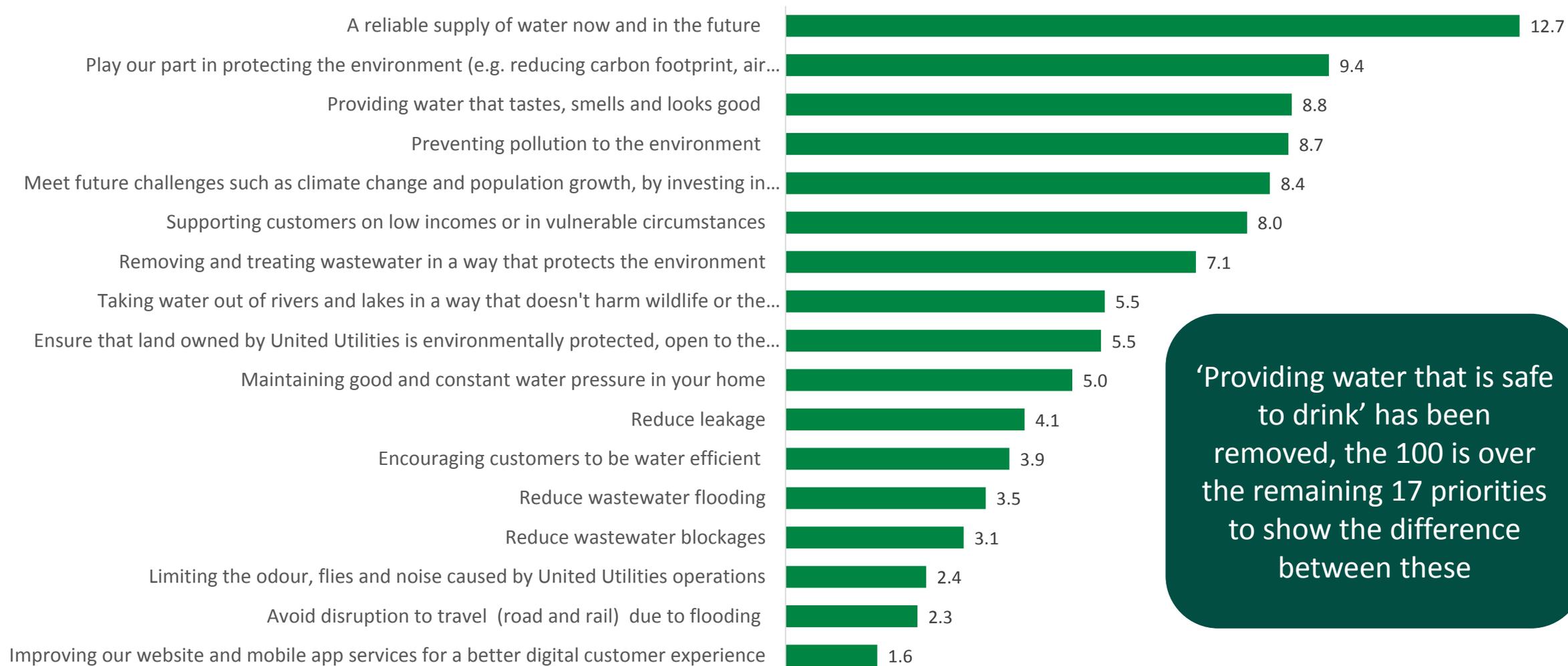


‘Providing water that is safe to drink’ has been removed, the 100 is over the remaining 17 priorities to show the difference between these

The total of all the numbers in the bar chart add up to 100%. Each value shows the % importance of each item. The larger the % the more important an area is. The % of each bar are relative to each other therefore a value of 10 % is twice as important as another area with a score of 5%.



# All priorities – Business Customers



‘Providing water that is safe to drink’ has been removed, the 100 is over the remaining 17 priorities to show the difference between these

The total of all the numbers in the bar chart add up to 100%. Each value shows the % importance of each item. The larger the % the more important an area is. The % of each bar are relative to each other therefore a value of 10 % is twice as important as another area with a score of 5%.

# Appendix 5 – Priorities that were seen as Essential by customers

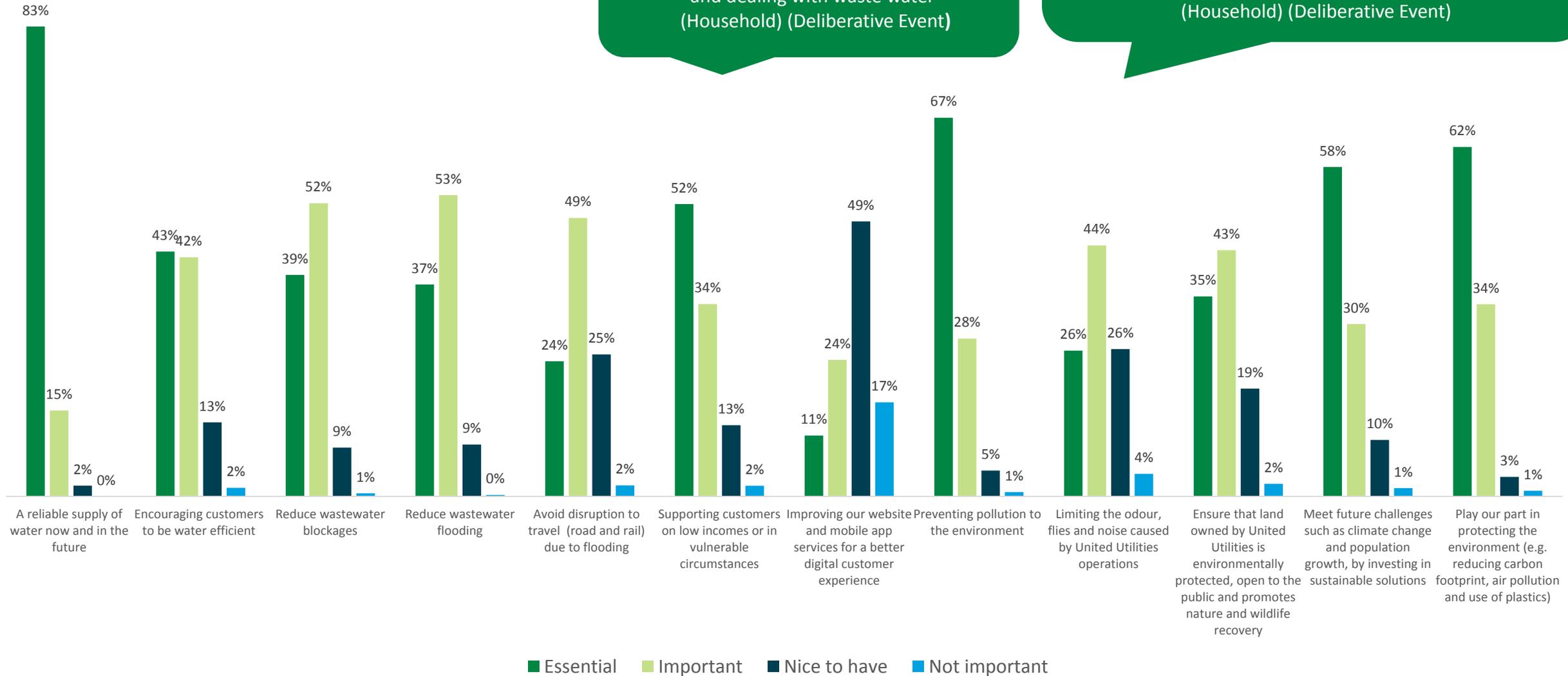


# Importance of priorities

## Household – General Population

‘As a society, I think we’ll become more conscious about the impact of providing water and dealing with waste water’  
(Household) (Deliberative Event)

‘They’re not all important to everybody, are they? Not everyone wants, necessarily, to have the website and mobile app services for a better digital customer experience.... It’s be good to be efficient and move with the times and everything, but its not even on the same parallel as the flooding and bursts, in my opinion, obviously.’  
(Household) (Deliberative Event)

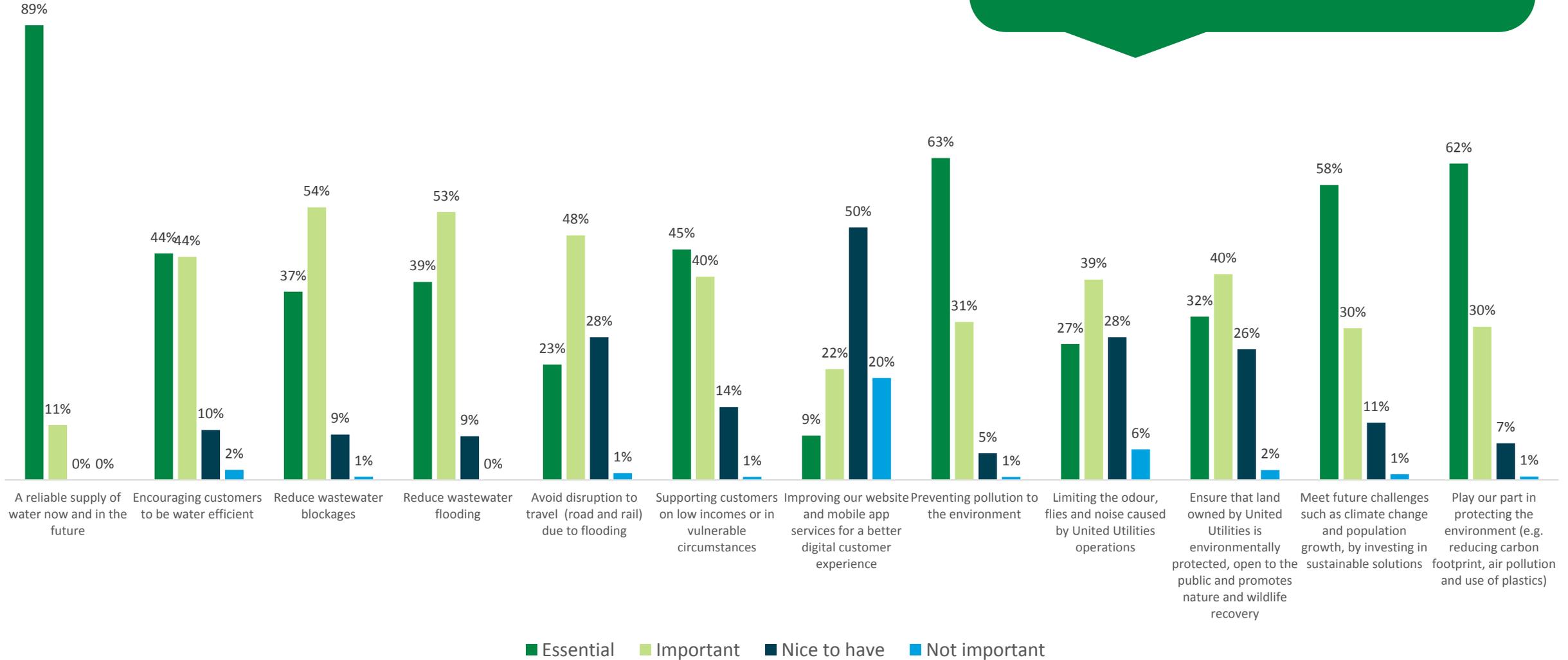




# Importance of priorities

## Household – Vulnerable

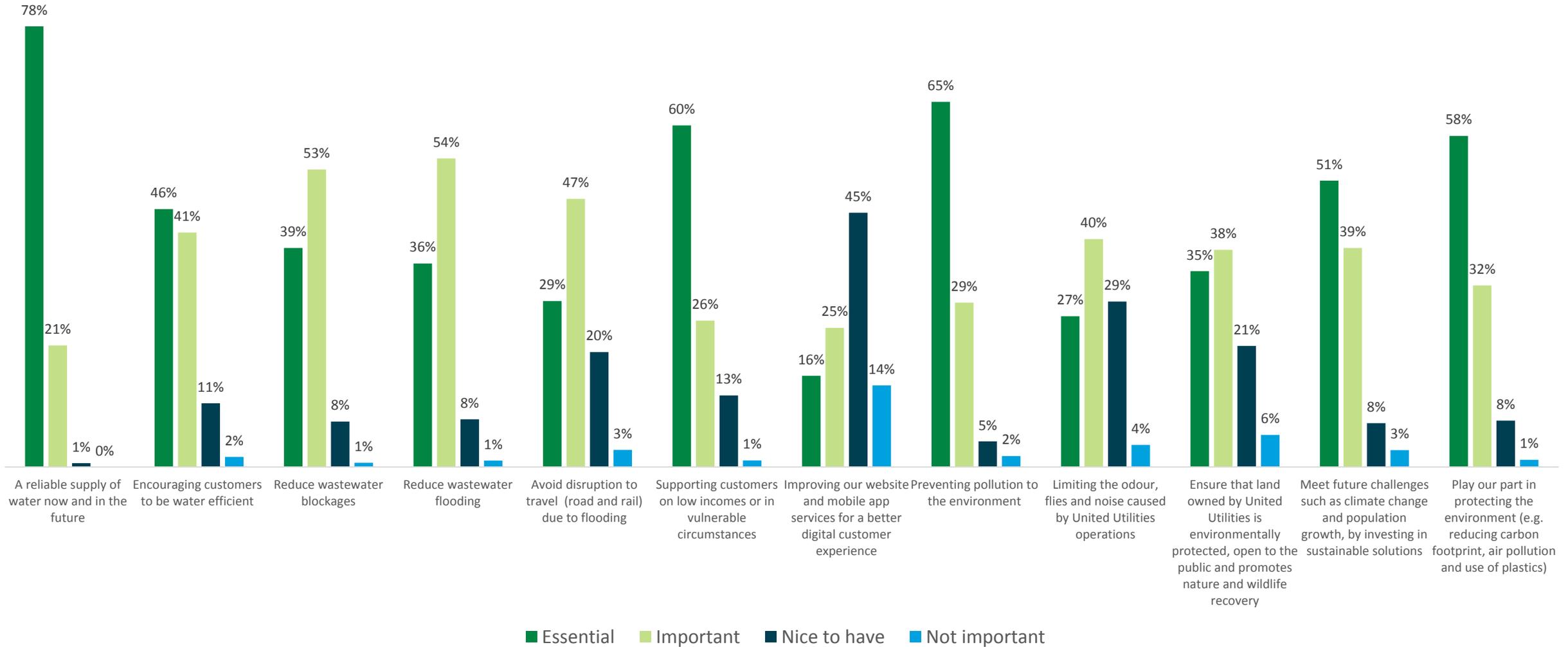
‘If you know what you’re doing, you know how to help, you know how to make things better for not only your future but your children’s future and your future grandchildren’s future, put the money into education, then we know what to do to make it better, which makes it more effective for everybody, right?’ (Vulnerable) (Deliberative Event)





# Importance of priorities

## Household – Low Income

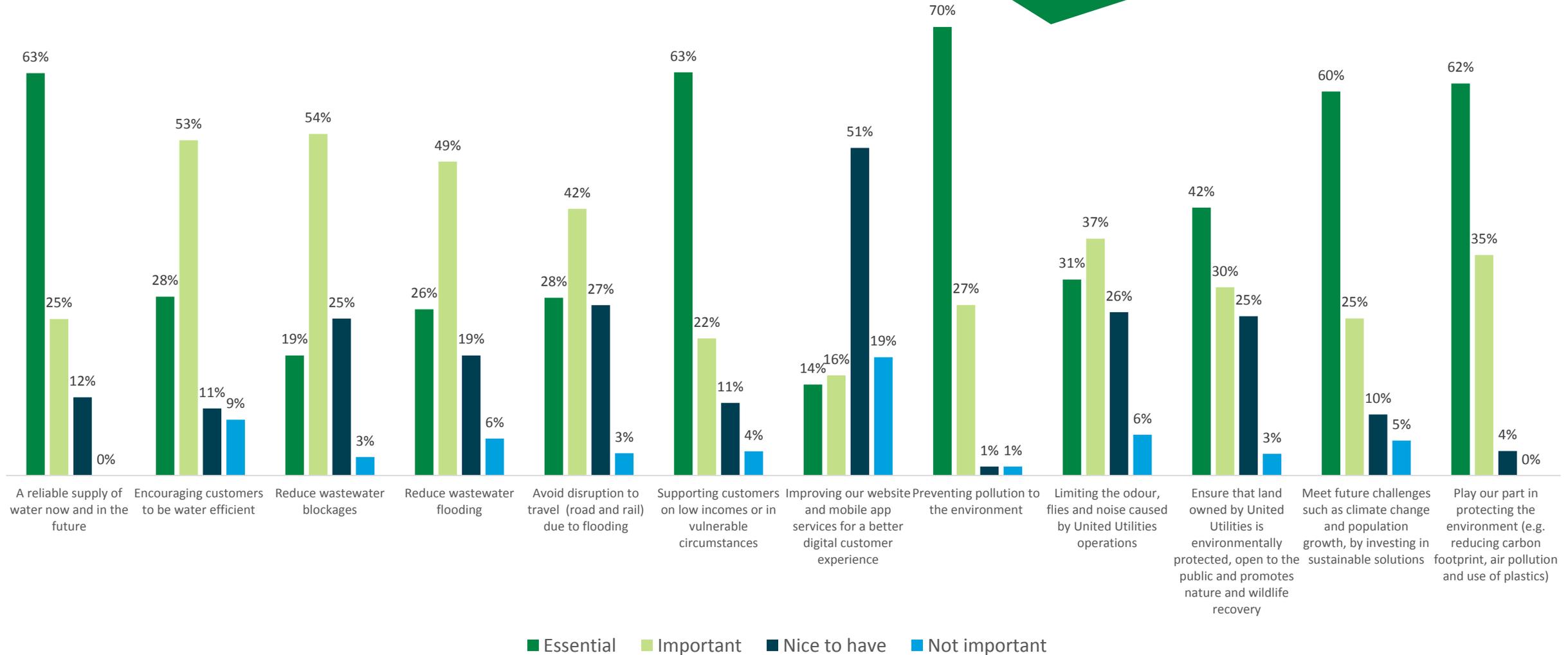




# Importance of priorities

## Household – Future Bill Payers

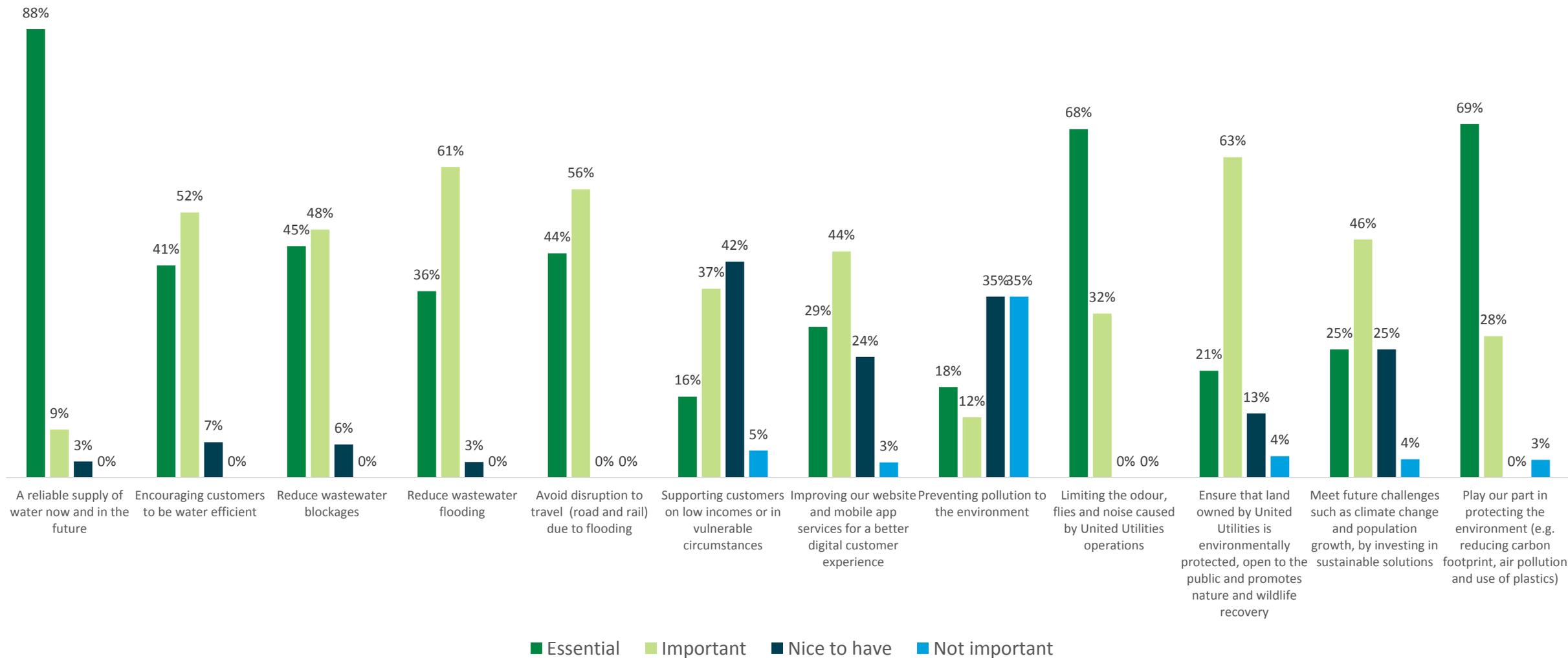
'As future bill payers I think the environment is such a big part of who we are and what we think is important, and companies that focus on that and advertise that, are a lot more attractive in that sense. It makes you feel better about paying those bills; it makes you feel that you're doing something good.' (Future Bill Payers) (Deliberative Event)





# Importance of priorities

## Digitally Excluded



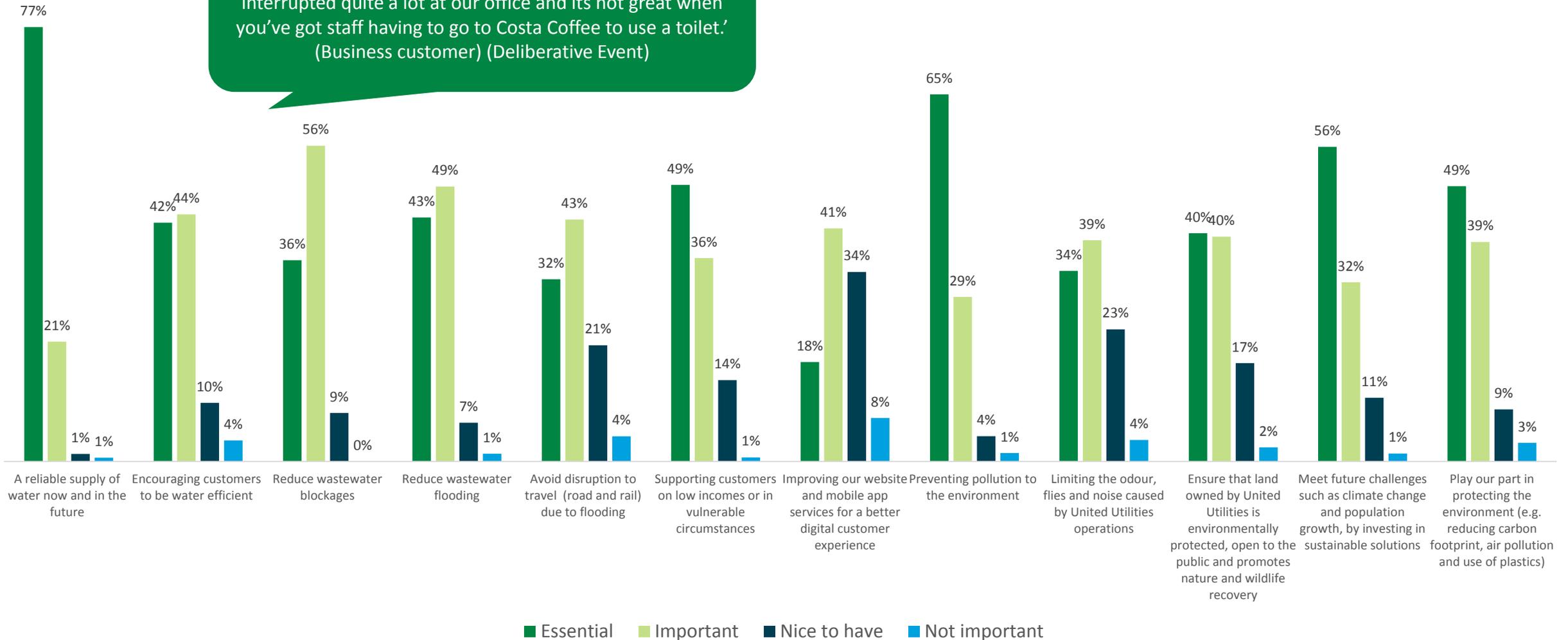


# Importance of priorities

## Business Customers

'The interruptions, that's caused us a few problems actually. Its interrupted quite a lot at our office and its not great when you've got staff having to go to Costa Coffee to use a toilet.'  
(Business customer) (Deliberative Event)

'I just think that they should get the other stuff right, the storm drains etc., to prevent the floods; I think that's a bigger problem. I think we've all got a duty to sort the environment out.'  
(Business customer) (Deliberative Event)



# Reasons why more discretionary priorities are classed essential or not important to customers – All Customers

A reliable supply of water now and in the future	
Essential (n=787)	Nice to have / Not Important (n=20)
I care about future generations 62%	I care about the environment 40%
It's what's best for me as a customer 42%	I don't think this is a problem that needs solving 25%
It's what's best for my community 41%	I'm worried about affordability/my bill going up 20%

Encouraging customers to be water efficient	
Essential (n=402)	Nice to have / Not Important (n=130)
I care about future generations 61%	It will help me and/or others save water 25%
I care about the environment 57%	I care about the environment 20%
It will help me and/or others save water 56%	I don't think this is a problem that needs solving 19%

Reduce wastewater blockages	
Essential (n=341)	Nice to have / Not Important (n=96)
I care about the environment 49%	I care about the environment 26%
It's what's best for my community 49%	I don't think this is a problem that needs solving 25%
I care about future generations 40%	It's what's best for my community 24%

Reduce wastewater flooding	
Essential (n=372)	Nice to have / Not Important (n=99)
I care about the environment 59%	It only affects a few people in a few places 32%
It's what's best for my community 50%	It's what's best for my community 29%
I care about future generations 40%	I care about the environment 24%

Avoid disruption to travel (road and rail) due to flooding	
Essential (n=256)	Nice to have / Not Important (n=266)
It's what's best for my community 61%	It only affects a few people in a few places 42%
It's what's best for me as a customer 34%	It's what's best for my community 22%
I care about the environment 31%	I don't think this is a problem that needs solving 19%

Supporting customers on low incomes or in vulnerable circumstances	
Essential (n=503)	Nice to have / Not Important (n=145)
It's what's best for my community 55%	It only affects a few people in a few places 28%
It will help me and/or others save money 48%	I'm worried about affordability/my bill going up 26%
It's what's best for me as a customer 35%	It's what's best for my community 19%

# Reasons why more discretionary priorities are classed essential or not important to customers – All Customers

## Improving our website and mobile app services for a better digital customer experience

Essential (n=107)	Nice to have / Not Important (n=486)
It will help me and/or others save money 45%	I don't think this is a problem that needs solving 48%
It's what's best for me as a customer 39%	It's what's best for me as a customer 23%
It will help me and/or others save water 38%	It only affects a few people in a few places 14%

## Ensure that land owned by United Utilities is environmentally protected, open to the public and promotes nature and wildlife recovery

Essential (n=357)	Nice to have / Not Important (n=237)
I care about the environment 80%	I care about the environment 35%
I care about future generations 56%	It's what's best for my community 24%
It's what's best for my community 50%	I don't think this is a problem that needs solving 23%

## Preventing pollution to the environment

Essential (n=626)	Nice to have / Not Important (n=51)
I care about the environment 85%	I care about the environment 29%
I care about future generations 67%	It's what's best for my community 24%
It's what's best for my community 43%	I care about future generations 22%

## Meet future challenges such as climate change and population growth, by investing in sustainable solutions

Essential (n=570)	Nice to have / Not Important (n=117)
I care about future generations 77%	I care about the environment 26%
I care about the environment 73%	I care about future generations 26%
It's what's best for my community 43%	It's what's best for my community 20%

## Limiting the odour, flies and noise caused by United Utilities operations

Essential (n=269)	Nice to have / Not Important (n=294)
It's what's best for my community 60%	It only affects a few people in a few places 43%
I care about the environment 50%	I don't think this is a problem that needs solving 26%
It's what's best for me as a customer 44%	It's what's best for my community 19%

## Play our part in protecting the environment (e.g. reducing carbon footprint, air pollution and use of plastics)

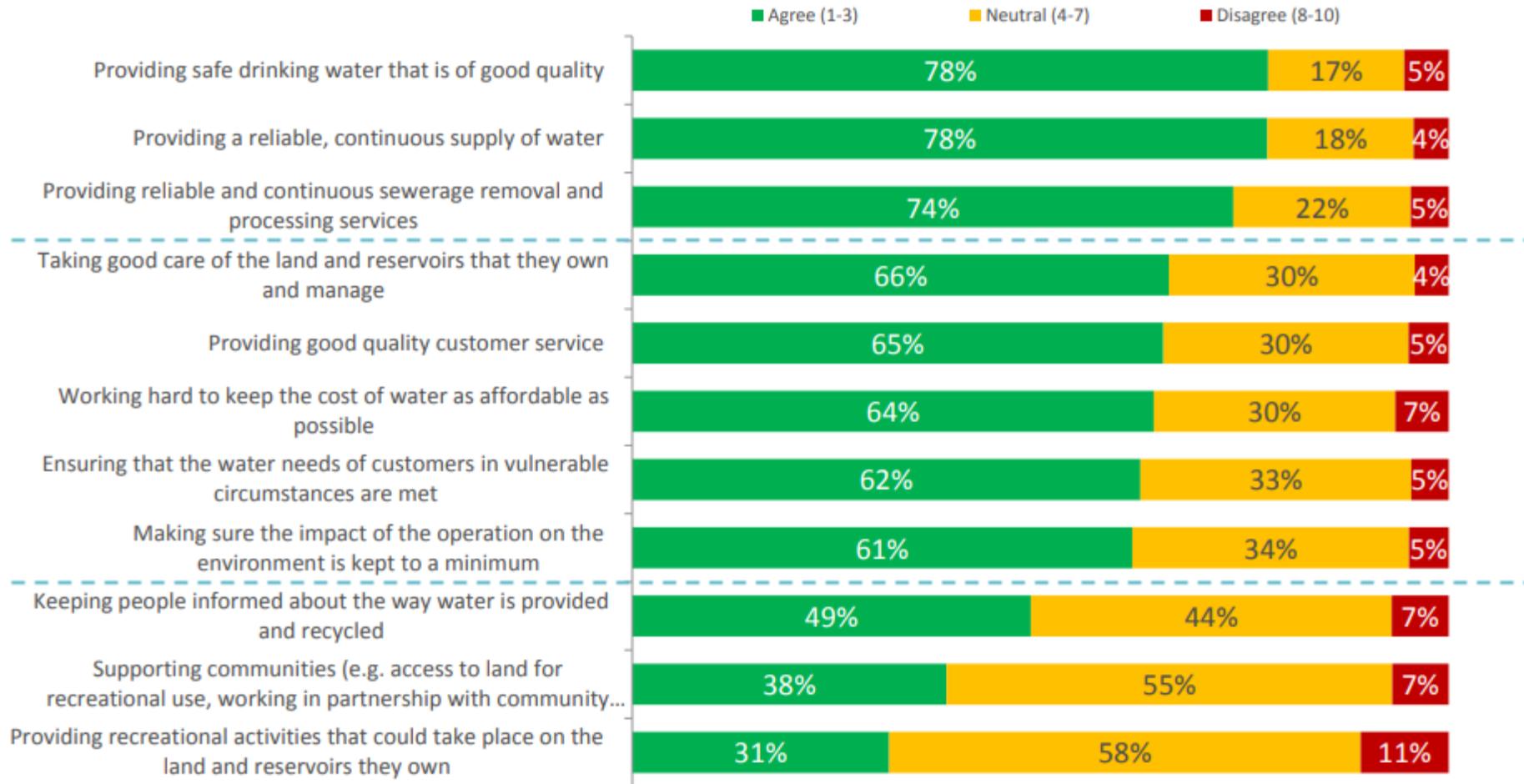
Essential (n=581)	Nice to have / Not Important (n=68)
I care about the environment 81%	I care about the environment 37%
I care about future generations 77%	I care about future generations 28%
It's what's best for my community 43%	I'm worried about affordability/my bill going up 15%

# Appendix 6 - Comparison to 2016

# 2016 Priorities Ranking

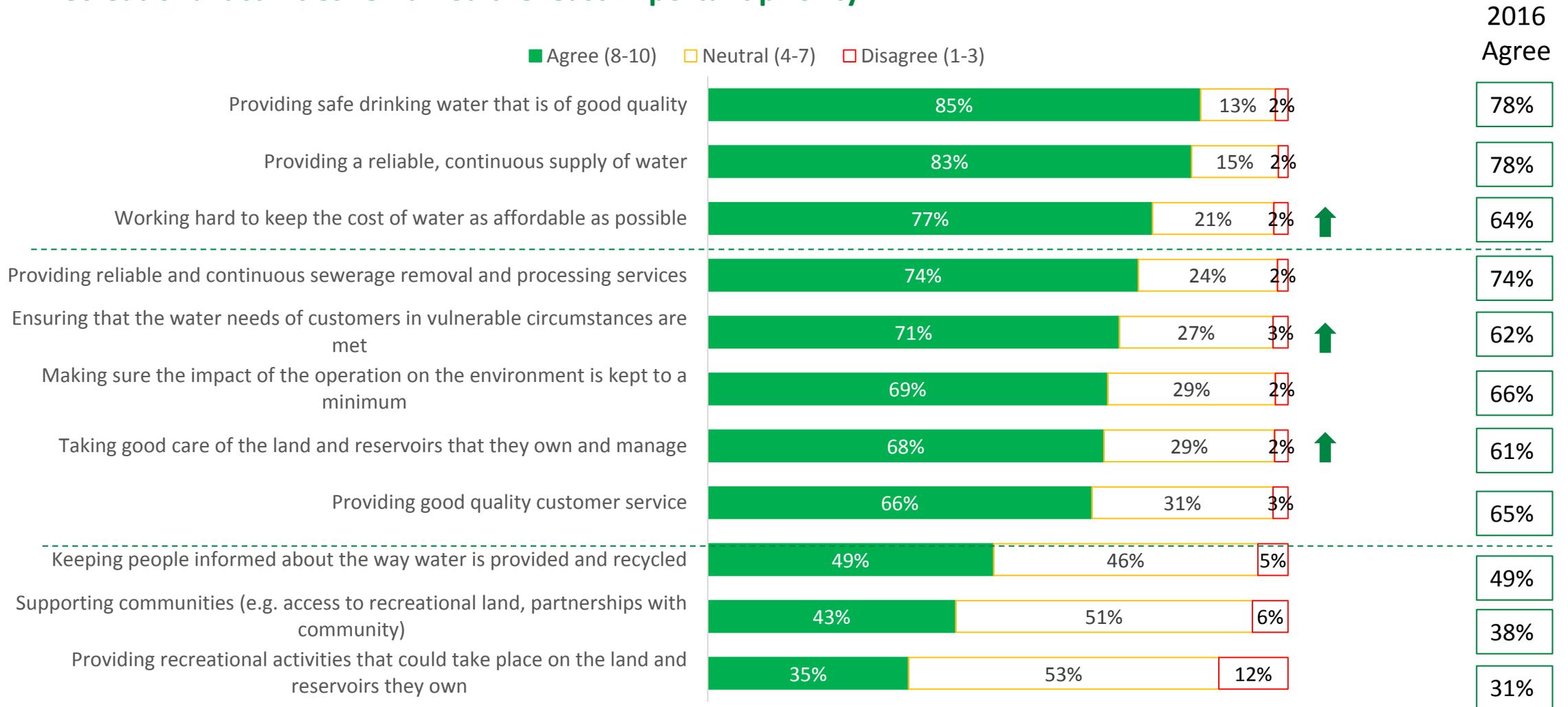
## Consumer priorities from 2016

### Areas that UU should focus on (from prompted list) – Consumer & SME



# How have priorities changed since 2016? – All Customers

Affordability is now 3<sup>rd</sup> most important to Customers in 2021 compared to 6<sup>th</sup> most important in 2016.  
Recreational activities remained the least important priority.

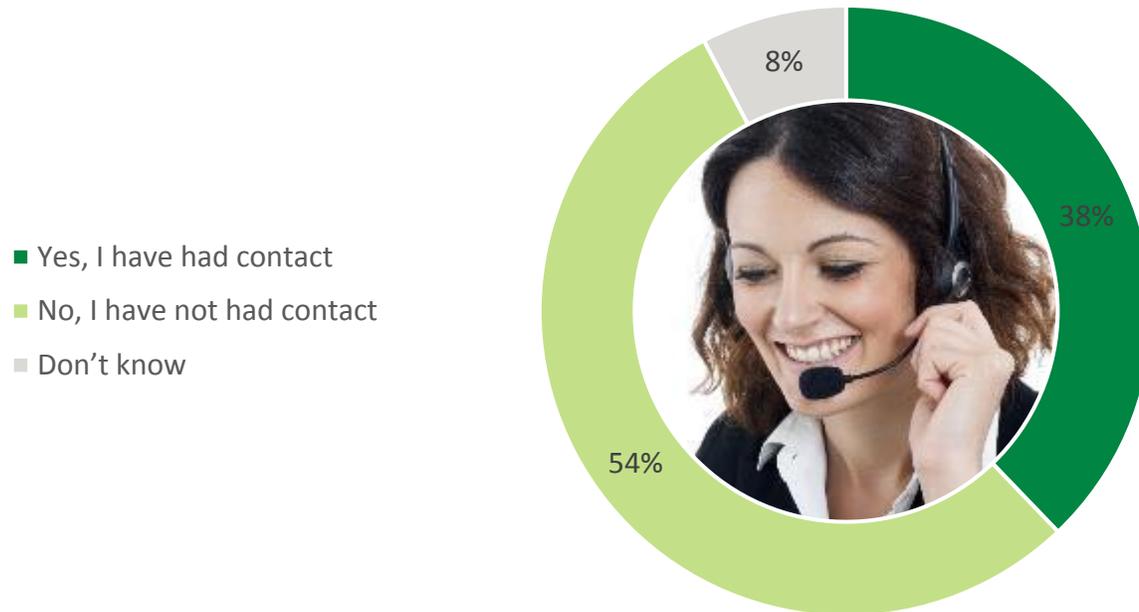


The small green arrows indicate the factors that have been rated as notably more important in 2021 than in 2016.

Copyright © United Utilities Water Limited 2020  
Q4 The following are initiatives that United Utilities looked at in 2016. Looking at the list below to what extent do you agree that your water company should be focused on each of these areas, where 1 is strongly disagree and 10 is strongly agree. Base: All Customers (3106)

# Appendix 7 – Other Information

# Previous Contact with United Utilities – All Customers

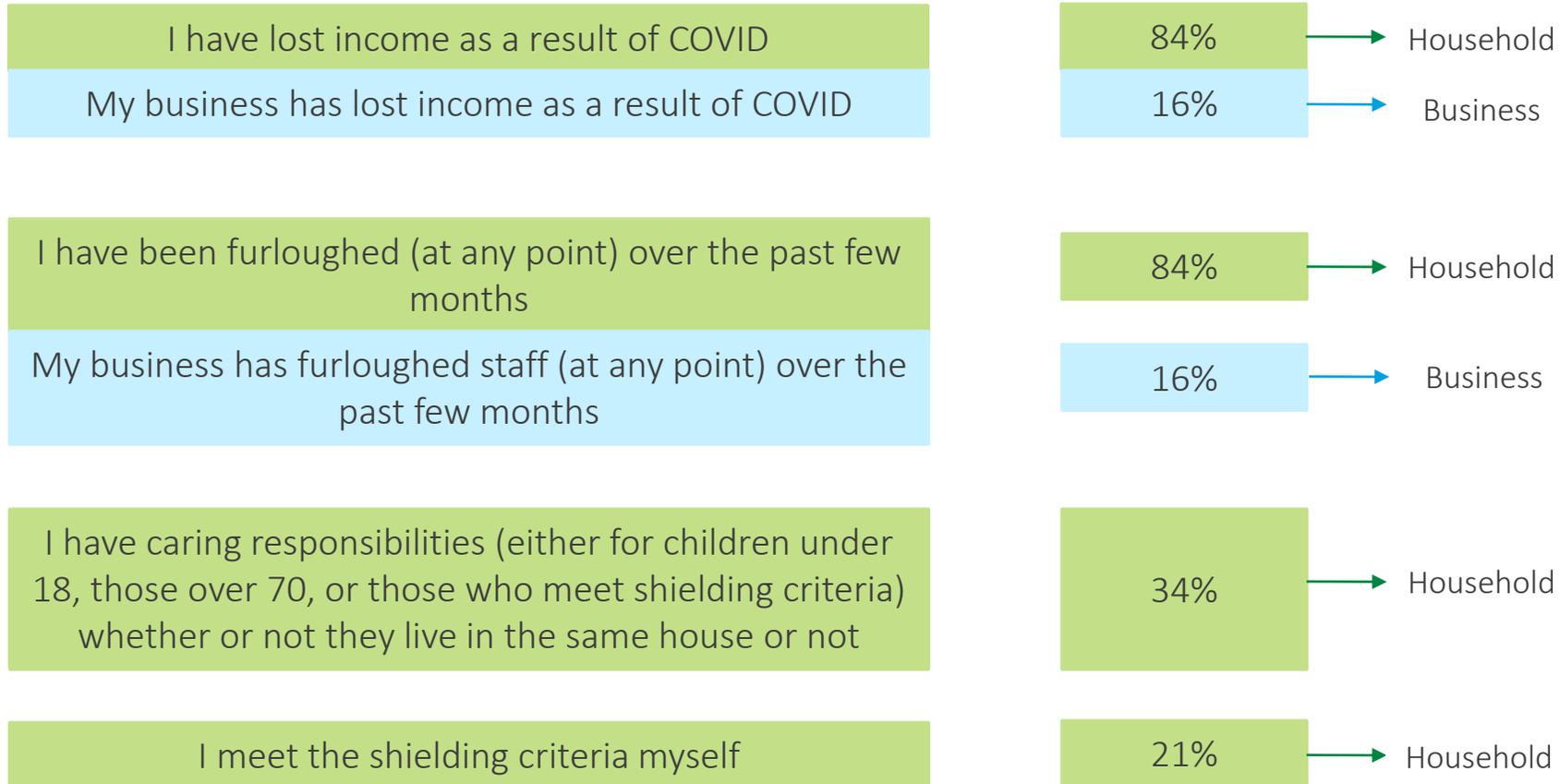


**70%** of customers were satisfied with the customer service they received  
(Score 8-10)

C1a Before today, have you ever contacted or been contacted by United Utilities? Base: All customers : (3106). C2 Thinking about your previous contact with United Utilities, how satisfied were you with the customer service that you received? Base: Yes to C1a (1176)

# COVID-19

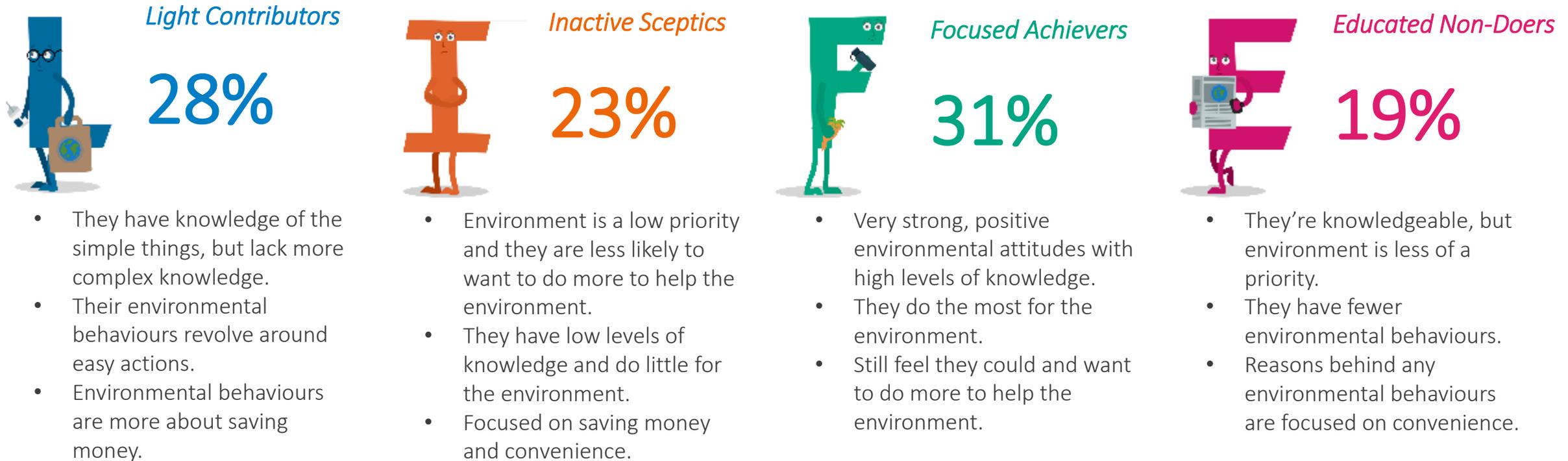
Questions regarding COVID-19 were asked to understand how the pandemic may have affected customers' current living or work situations and finances.



**Resulting from COVID, most Household Customers (84%) both lost income and were furloughed at some point, whereas Business Customers were far less likely to lose income or furlough staff (16%).**

# IMPACT'S 'LIFE' SEGMENTATION

We, here at Impact, have developed our own segmentation based on consumers' environmental attitudes. An outline of our segments can be found below.



# Thank you

Hala Osman

Head of Utilities

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All projects are carried out in compliance with the ISO 20252 international standard for market, opinion and social research and GDPR.