



Water for the North West

Fluidmaster Research

March 2024

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Background, objectives & methodology

Background and objectives

Each year, United Utilities runs a programme called the Innovation Lab which gives a handful of applicants the chance to trial their solutions in an operational setting. One of this year's participants is Save Water Save Money, who have created a product with Fluidmaster that is intended to be a universal leak-free fix to tackle leaky toilets in residential and commercial properties.

United Utilities commissioned this piece of research to understand customers' experiences with leaks at home, and to gather opinions on the new syphon.

Key objectives:

- To determine the likelihood of uptake, and identify any barriers to purchase.
- To gather insight on perceived ease of installation.
- To determine the route to market for the syphon.
- To test a scale of price points to assess willingness to pay for the syphon.

 Fluidmaster.



 savewater savemoney

Leaky Loo solution – introducing our new Easy Fit Ultra Syphon

Button activated universal leak free flush valve

The importance of saving water

We all know that water is widely considered to be Earth's most precious resource. *'The value of water for people, the environment, industry, agriculture and cultures has been long-recognised, not least because achieving safely-managed drinking water is essential for human life.'*¹

The Leaky Loo Problem

Between 4% and 8% of UK toilets are leaking. A worn flush valve can create an internal leak within a toilet, allowing many thousands of litres of clean water to trickle from the cistern and into the bowl. Considering that a single leaky loo can waste up to 400 litres of water per day, it is easy to understand the importance of identifying and fixing leaking toilets.

¹ *Why the world needs to rethink the value of water* | University of Oxford

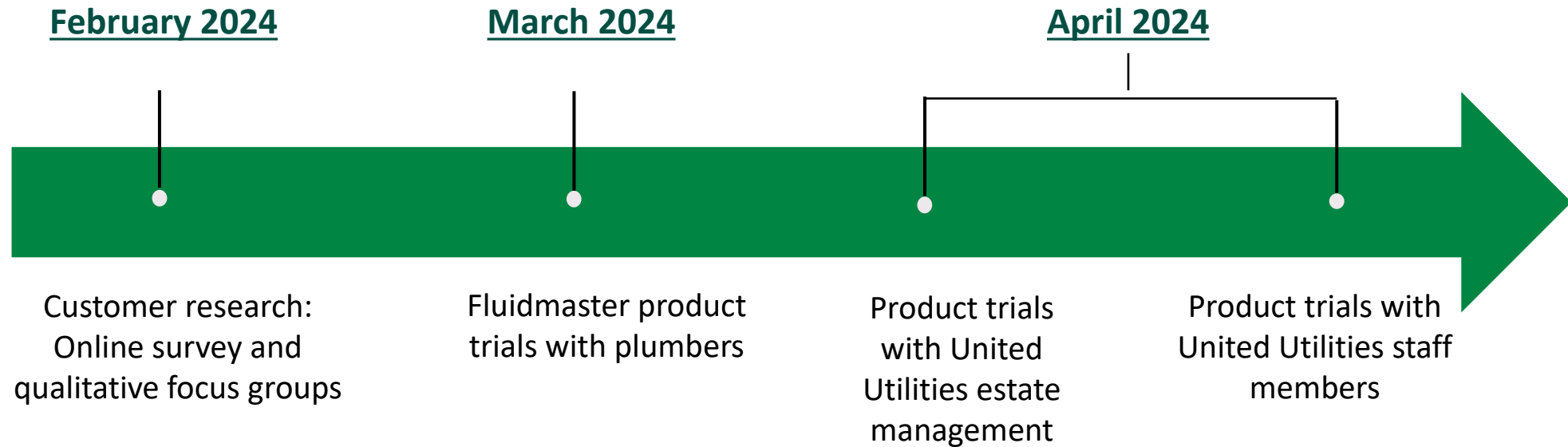
Patent pending.



December 2023

Programme of research

This research constitutes the first step in a comprehensive programme of research into customer's perceptions of the syphon, and their willingness to pay and install. Further research will be conducted in Spring 2024, as shown below.



Customer Groupings

We approached multiple groups of customers as part of this research...

When there is an unusual amount of water being used in a metered home, this triggers a leak alarm at Untied Utilities. When a leak alarm sounds, metered customers are emailed to notify them of a leak in the household.

Group 1 Leak Fixers

This group have received this email and taken action to stop the leak.

Group 2 Leak Ignorers

These are customers who have received the previously mentioned email and not taken action to stop the leak.

Group 3 Leak Claimers (Get Water Fit)

This group is made up of customers who have signed up to Get Water Fit and have stated on sign-up that they think they have a leak.

Group 4 Unmetered Leak Customers

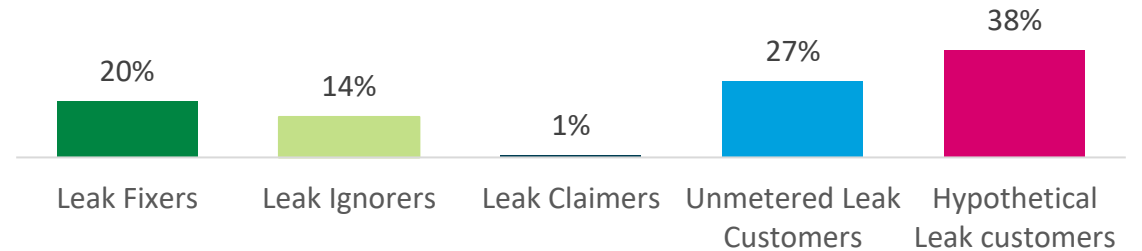
Unmetered customers who have had a leak and either fixed or ignored it.

Group 5 Hypothetical Leak Customers

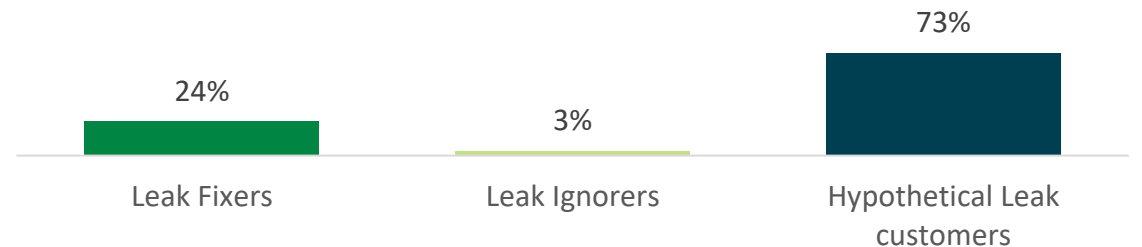
Both metered and unmetered customers who are not currently experiencing a leak but could in the future. This forms the majority of the customer base and makes up 73% of the research sample. As such, results reported at a 'total' level will be heavily weighted toward Hypothetical customers.

During the course of the survey, customers were asked a number of questions designed to confirm their grouping, and are then re-classified as appropriate...

Original Grouping on Sample



New Grouping Determined by Survey Answers



*Note – Group differences highlighted throughout this report are based on New Grouping shown above. All charts use data weighted to be representative of population in United Utilities regions, but bases shown in footnotes represent true unweighted values.

Methodology



Quantitative

1,698 Total sample

1,637 Online, 61 CAPI (Digitally excluded customers)

Prior to full launch, DJS conducted a soft launch of the online survey to test participants' understanding of the survey and identify any areas for improvement.

Following this, a total of 1698 interviews were carried out, split between online and face-to-face CAPI (Computer Assisted Personal Interview) methodologies, with the latter specifically targeting digitally excluded customers.

Additionally, results have been weighted by region to ensure they are reflective of the United Utilities customer base.

Fieldwork Dates:

Online: 30th January – 12th February

CAPI: 11th – 19th February

UU customer sample was used as our potential pool of respondents for the online survey. This was used in combination with recruitment from DJS's online panel Opinion Exchange to recruit participants to the qualitative focus groups.



Qualitative

30 Total sample

4 focus groups spanning customer subgroups and region

We undertook three face-to-face focus groups, and one online focus group.

Group Location	Regions recruited*	Date	Sample Group
Manchester	Greater Manchester	6th Feb	Leak Fixers (8)
Preston	Lancashire	7th Feb	Unmetered leak customers (9)
Carlisle	Cumbria	13th Feb	Hypothetical Leak customers (9)
Online	Greater Manchester	15 th Feb	Leak Ignorers (4**)

We selected participants based on their leak experience, as well as a range of ages, gender and SEG.

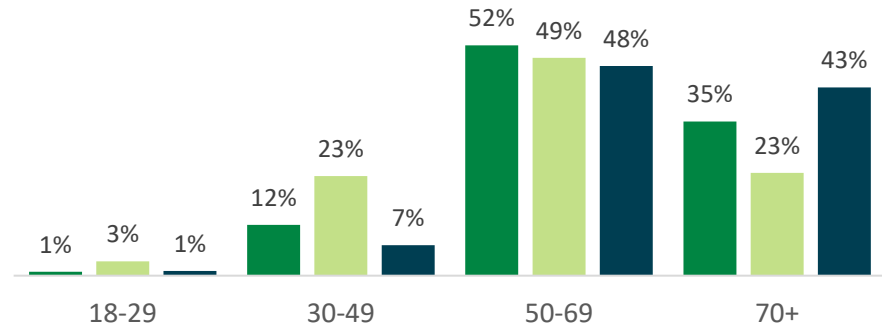
All focus groups were attended by a United Utilities representative, with these representatives taking an active part in both the Preston and Carlisle groups, by way of introducing the product and the Innovation Lab.

Note* Due to difficulties finding respondents of each customer group across United Utilities' 5 regions, recruiting all 5 customer groups was prioritised over region, hence the absence of Cheshire and Merseyside. However, respondents across all 5 regions have been represented in the online survey ****** Due to the high proportion of customers incorrectly documented as Leak Ignorers, it was deemed not possible to recruit 8 respondents in one region. As such, the decision was made to use an online focus group methodology with a smaller sample group in order to ensure this group would be represented.

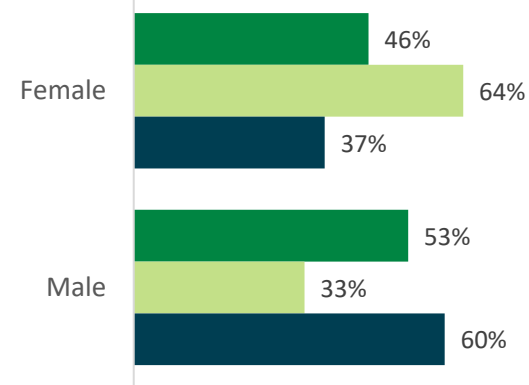
New customer groupings - Demographics

■ Leak fixers ■ Leak ignorers ■ Hypothetical

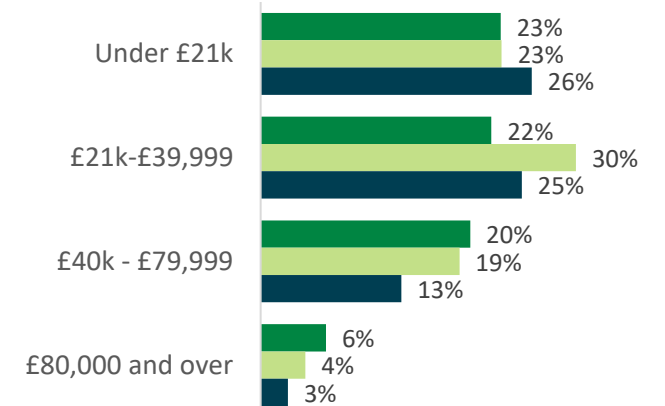
Age



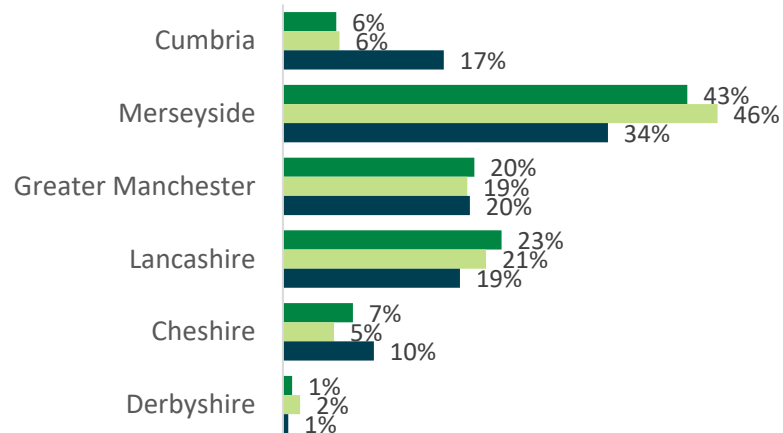
Gender



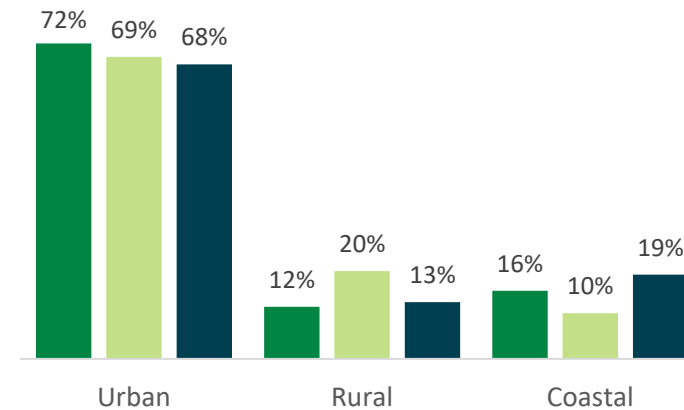
Income band



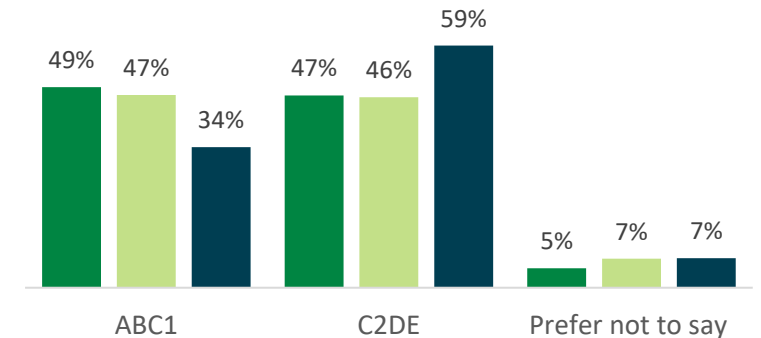
United Utilities Region



Region Type



SEG



Base: All respondents (1698) **S02.** How would you describe yourself? **S03.** Which of the following age groups do you fall within? **S04.** Where in the North West do you live? **S05.** Would you describe where you live as... **S06.** Which of the following best describes your occupation? **C04.** Which of the following income bands does your total household income fall into?

Context

The following events happened before or during fieldwork and may have influenced customers' answers...

Cost of living and increases in bills

Since late 2021, a large proportion of the UK population have experienced the effects of the cost-of-living crisis. In February 2023, United Utilities announced that 2023/24 bills would see a 6.4% increase.

Related news articles released across the fieldwork period:

2nd Feb – BBC article titled 'Water bills to rise above inflation in April'

Water companies in England, Wales, and Scotland are expected to implement above-inflation increases in household bills in April, with average annual bills rising by 6% and 8.8% respectively. This rise is attributed to significant investments aimed at improving water supply security and reducing sewage pollution. However, critics argue that these increases will add pressure on low-income households, and there are calls for water companies to offer more financial support. Meanwhile, regulators are considering proposals for further bill increases to fund infrastructure upgrades, prompting discussions about balancing affordability with the need for essential improvements in water and sewage systems.



Context – Leaky loos

The following news articles published during fieldwork and may have influenced customers' answers...

Press Release relating to competitor product

30th Jan – Made in Britain - Thomas Dudley signals the end of the leaky toilet valve

Thomas Dudley, a UK-based manufacturer, announces the development of a new leak-proof toilet valve, aiming to eliminate the common problem of leaking toilets. The innovative design utilises a dual action diaphragm, enhancing reliability and reducing water wastage, signaling a significant advancement in toilet valve technology for both domestic and commercial applications. It also boasts a hassle-free installation process.

Signposting to current water-saving devices

14th Feb 24 - Which? Magazine - 9 ways to have a more eco-friendly bathroom.

This article stresses the importance of fixing leaks in the house (including toilet leaks), as well as signposting towards water-saving products. There are specific mentions of dual-flush toilets, and also information about products bearing the Unified Water Label, which to help consumers across Europe and the UK choose water-saving products more easily.



Ofwat standards for high-quality research

Ofwat have set out requirements for [high-quality research in their Customer Engagement Policy](#). All water company research and engagement should follow best practice and lead to a meaningful understanding of what is important to customers and wider stakeholders.

Useful and contextualised

This research was conducted in order to determine the route to market and to understand if customers would consider take up of the product and how it can be marketed effectively to reduce leaks and water wastage. The results of the research will be used to inform decisions surrounding the price, positioning and promotion of the syphon. The research was contextualised using a range of existing research on leaks and water saving devices.

Fit for purpose

The research was designed with input from the industry experts, who also participated in the drafting of the stimulus material. To assure that material is easy to understand and engaging, DJS Research also conducted a soft launch of the online survey.

Ethical

This research was conducted by DJS Research who are a member of the Market Research Society. Participants were informed at the beginning of the survey that they could be open and honest in their views due to anonymity and DJS and United Utilities were subject to strict data protection protocols.

Continual

The results will inform whether the product is a viable option for customers to use. Ultimately, the research element will be used in conjunction with the physical product trial to understand whether the application of the innovation is successful and to propose a sensible route to market.

Inclusive

This research included customers from each of the United Utilities regions, and included a mix of online and face-to-face CAPI surveys to assure the inclusion of digitally excluded customers.

Neutrally designed

Every effort has been made to ensure that the research is neutral and free from bias. Where there is the potential for bias, this has been acknowledged in the report. Participants were encouraged to give their open and honest views and reassurances were given throughout the research that United Utilities were open to hearing their honest opinions and experiences. The pricing exercise was designed to ensure that customer Willingness to Pay was gathered in a methodical and unbiased manner.

Independently assured

Research was conducted by DJS Research, an independent market research agency. United Utilities collaborated with Your Voice, the Independent Challenge Group, who reviewed all research materials and provided a check and challenge approach on the method and findings.

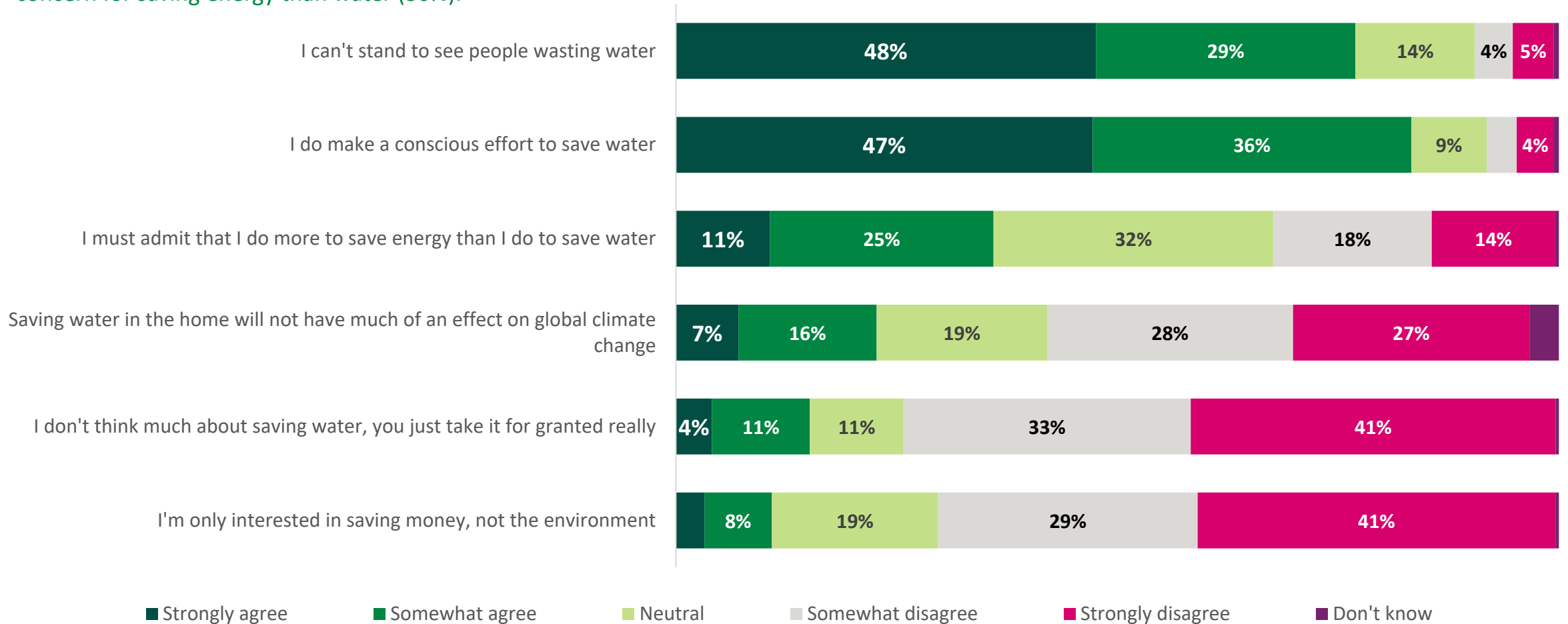
Shared in full with others

The full final report and research materials will be shared on the United Utilities' research library webpage and through their industry newsletter The Source.

Attitudes towards saving water

Attitudes to saving water – total sample

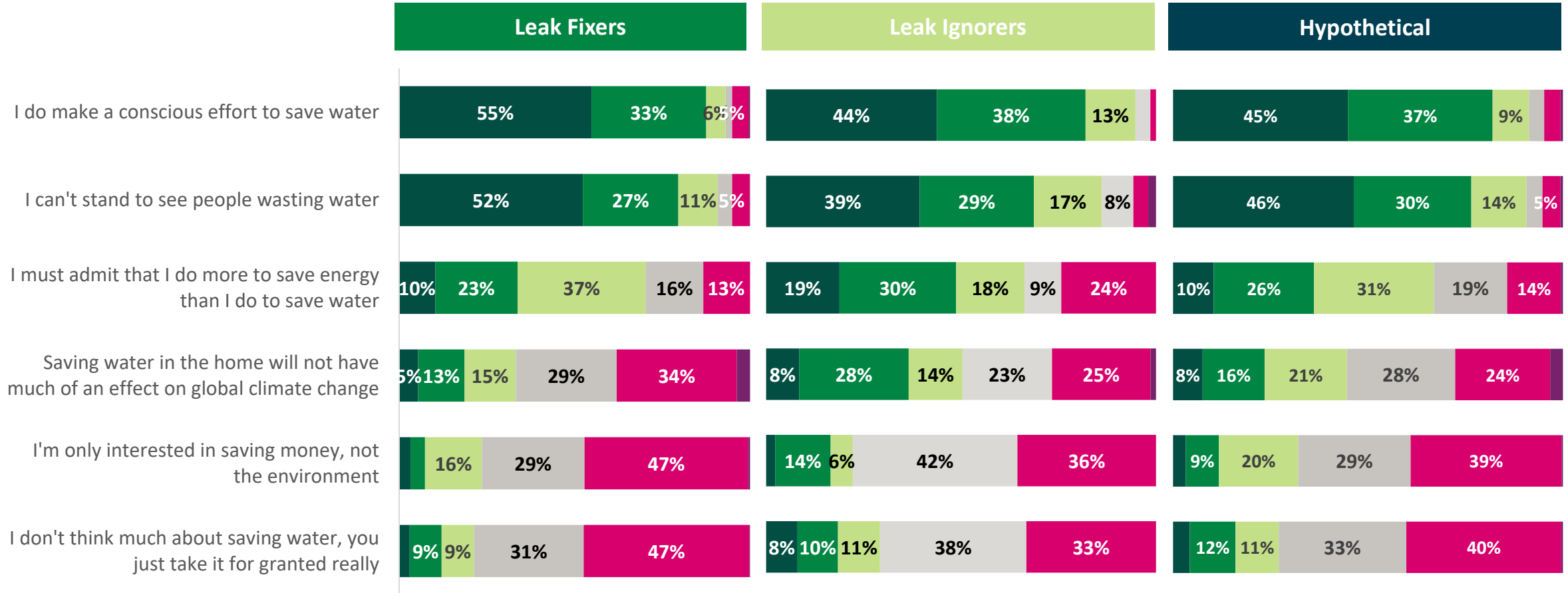
Overall, customers show positive attitudes toward saving water. Motivations are more stemmed in saving the environment than saving money, with just 11% noting that their focus is financial rather than environmental. However, over one-third of people show more concern for saving energy than water (36%).



Base: All respondents (1698) S09 How much do you agree or disagree with the following statements related specifically to saving water? *Data labels <4% not shown.

Attitudes to saving water – Customer Group

All customer groups express positive attitudes towards saving water, with 88% of Leak Fixers and 82% of Leak Ignorers and hypotheticals doing so consciously. However, Leak Ignorers are 8 percentage points more likely than Leak Fixers to agree that saving water at home won't make a difference to global climate change. This represents a significant difference between customer groups.

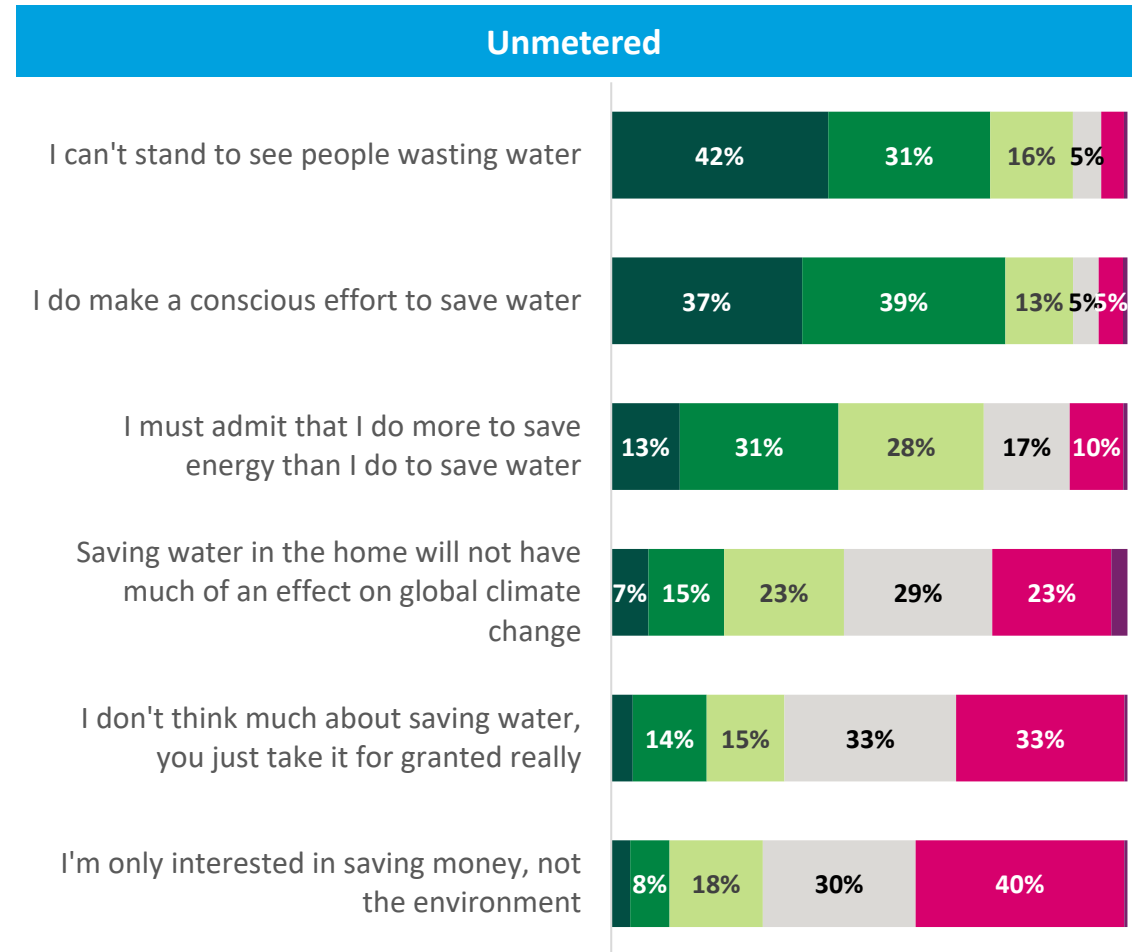
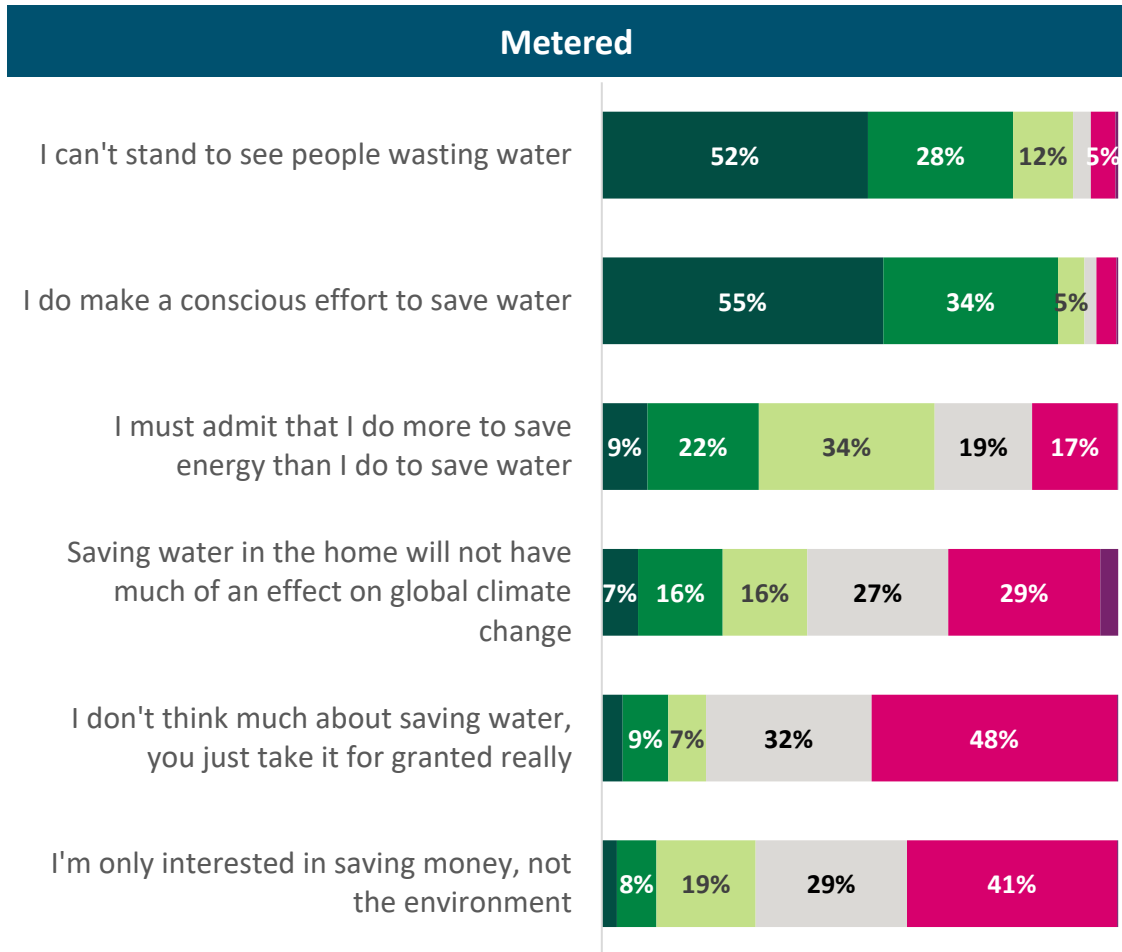


Base: All respondents (1698) S09 How much do you agree or disagree with the following statements related specifically to saving water?

*Data labels <5% not shown

Attitudes to saving water – Metered Status

Metered customers have slightly stronger positive opinions and attitudes towards saving water than unmetered customers. However, views on saving money rather than saving the environment are the same across the two groups.



Base: All respondents (1698) S09 How much do you agree or disagree with the following statements related specifically to saving water? *Data labels <5% not shown

Attitudes to saving water – Demographic differences

Positive attitudes towards saving water are comparatively stronger amongst females, customers living in coastal areas, and those who fall into socioeconomic group ABC1.

Gender:

Females show more positive opinions towards saving water in answers to all but one of the statements shown:

Statement	Female	Male
I don't think much about saving water, you just take it for granted really	78% disagree	71% disagree
I must admit that I do more to save energy than I do to save water	35% disagree	30% disagree
Saving water in the home will not have much of an effect on global climate change	59% disagree	52% disagree
I'm only interested in saving money, not the environment	72% disagree	69% disagree
I do make a conscious effort to save water	86% agree	82% agree
I can't stand to see people wasting water	80% agree	75% agree

Region:

Customers in Cumbria are significantly more likely to agree that they do more to save energy than water (43%) than customers in Greater Manchester (34%) and Cheshire (32%).

Moreover, those in Cheshire are significantly more likely to agree that they can't stand seeing people waste water (82%) compared to customers in Greater Manchester (75%).

More generally, customers in coastal areas exhibit significantly more positive attitudes to saving water.

Age:

Those aged 70+ are significantly less likely to disagree that saving water in the home will not have much of an effect on global climate change (51%) compared to those aged 30-49 (62%) and 50-69 (57%).

Customers aged 18-29* are significantly more likely than any other age group to agree that they are only interested in saving money, not the environment (28% cf 11% for 30-49 and 50-69, and 10% aged 70+).

SEG:

Customers in SEG ABC1 exhibit more positive attitudes to saving water in 4 of the 6 statements posed.

Notably, ABC1 are 8 percentage points more likely to show positive attitudes to thinking about saving water (79% cf 71%), household contributions towards climate change (60% cf 52%), and saving the environment rather than saving money (75% cf 67%).

Base: All respondents (1698) **S09** How much do you agree or disagree with the following statements related specifically to saving water?

*Caution – low base size (20)

Significantly higher than comparator **Significantly lower than comparator**

Attitudes to saving water

Overall, customers are in favour of reducing their water usage, and actively do so to varying degrees in their own homes. Motivations are both economic and environmental.

General attitudes:

Customers are conscious of the need to save water and there's a good understanding of the benefits that saving water has for them (lowering bills) and the environment.

Water-saving techniques have been influenced by a range of sources, from videos seen on YouTube, to the experiences of neighbours and friends.

Education is needed – customers say that although they hear a lot about recycling in general, they don't know a lot about water wastage saving and recycling water.

Interestingly, those who have young children at home often mention that their children are up to speed when it comes to saving water as this subject is covered at school.

Prevalence

Common water-saving methods:

- Turning the tap off when brushing their teeth,
- Using water butts,
- Saving their dishwater to use in their gardens,
- Washing their dishes by hand instead of using the dishwasher, or using a washing-up bowl
- Switching from baths to showers,
- Shorter showers,
- Not overfilling the kettle
- Using the eco setting on washing machines
- Collecting excess water in bottles or buckets to use in gardens or for cooking.
- Using water flow regulators on their taps, and showerheads.
- Installing dual flushes on toilets.

Attitudes towards saving water vary slightly depending on metered status.

Metered customers are more likely to mention cost benefits, whereas unmetered customer focus primarily on the environmental advantages. However, for both groups, this is seen as more of a moral obligation rather than a money matter. Those on a meter advocate getting one fitted on the basis that they will save water and money in the long-term as it has helped them to keep track of their usage.

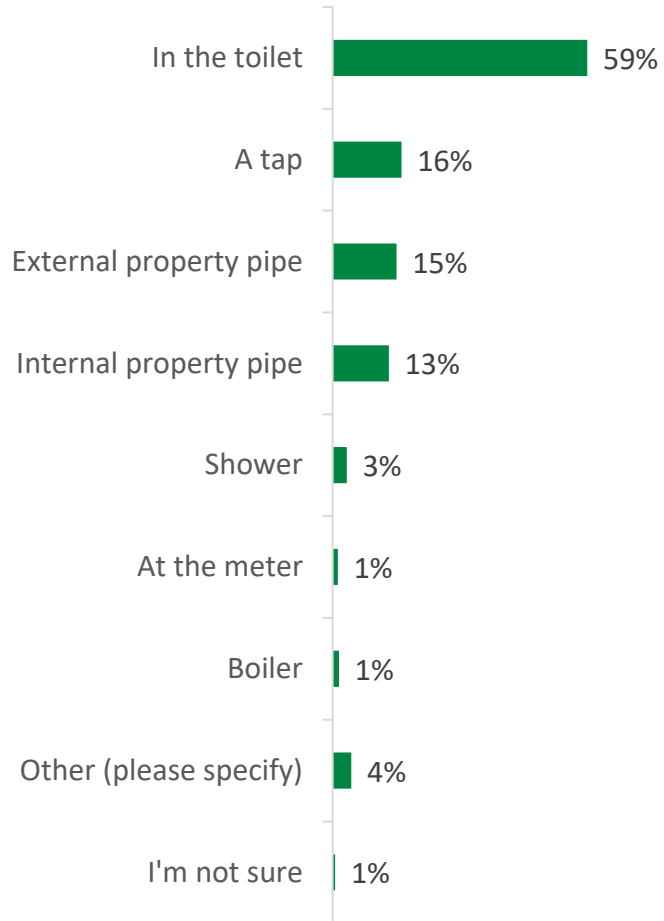
“I couldn't believe that such a small toilet leak led to that much water and money being wasted. This has made me more mindful of saving water and dealing with leaks in my home.”

Leak Fixer

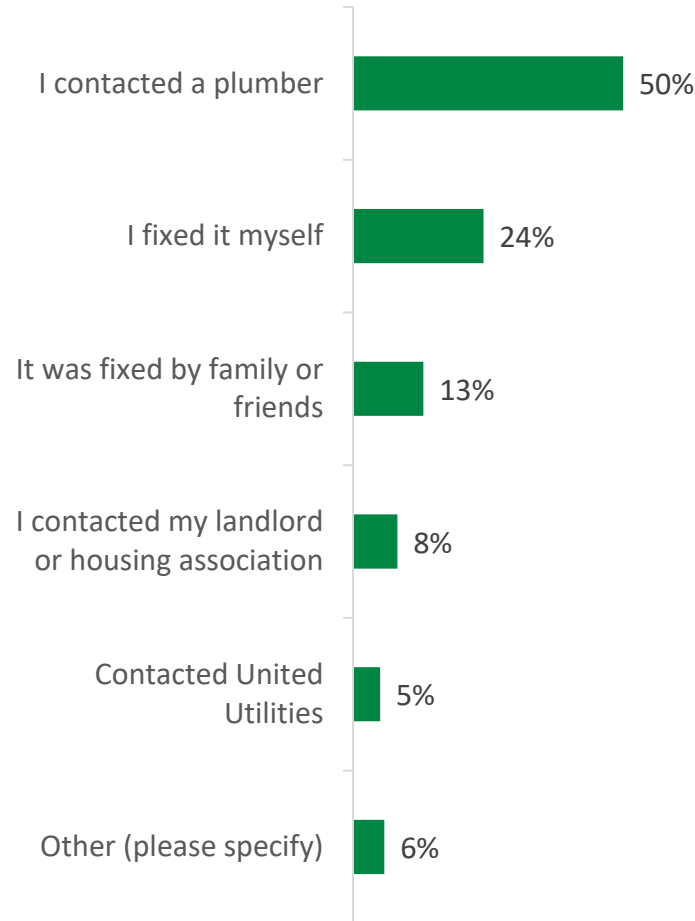
Leak Fixers

Personal experiences with leaks in the home – Leak Fixers

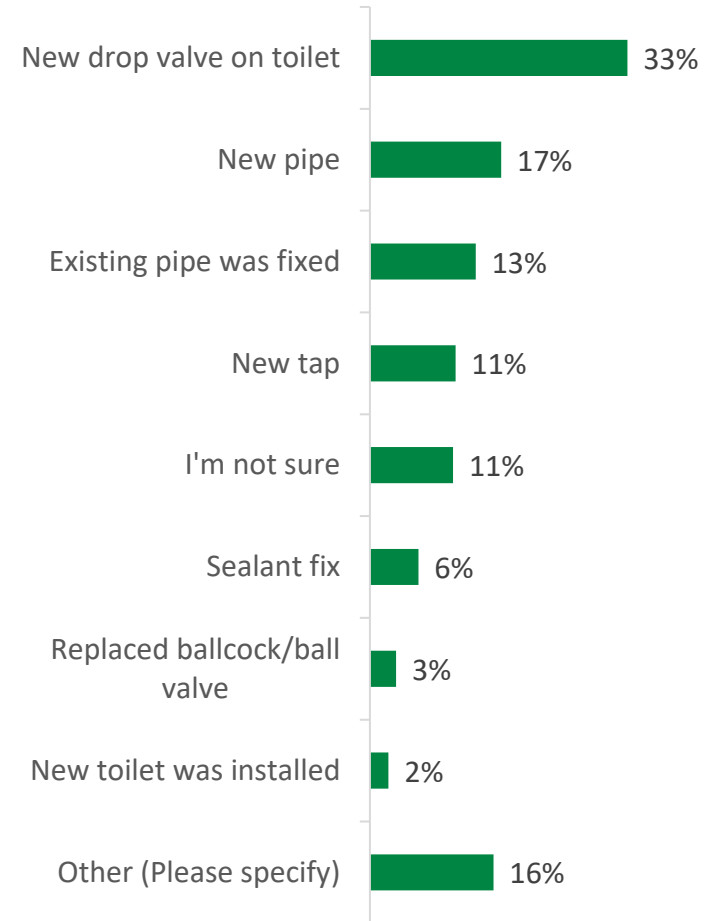
Leak location



Actions taken to fix leak



Leak repair

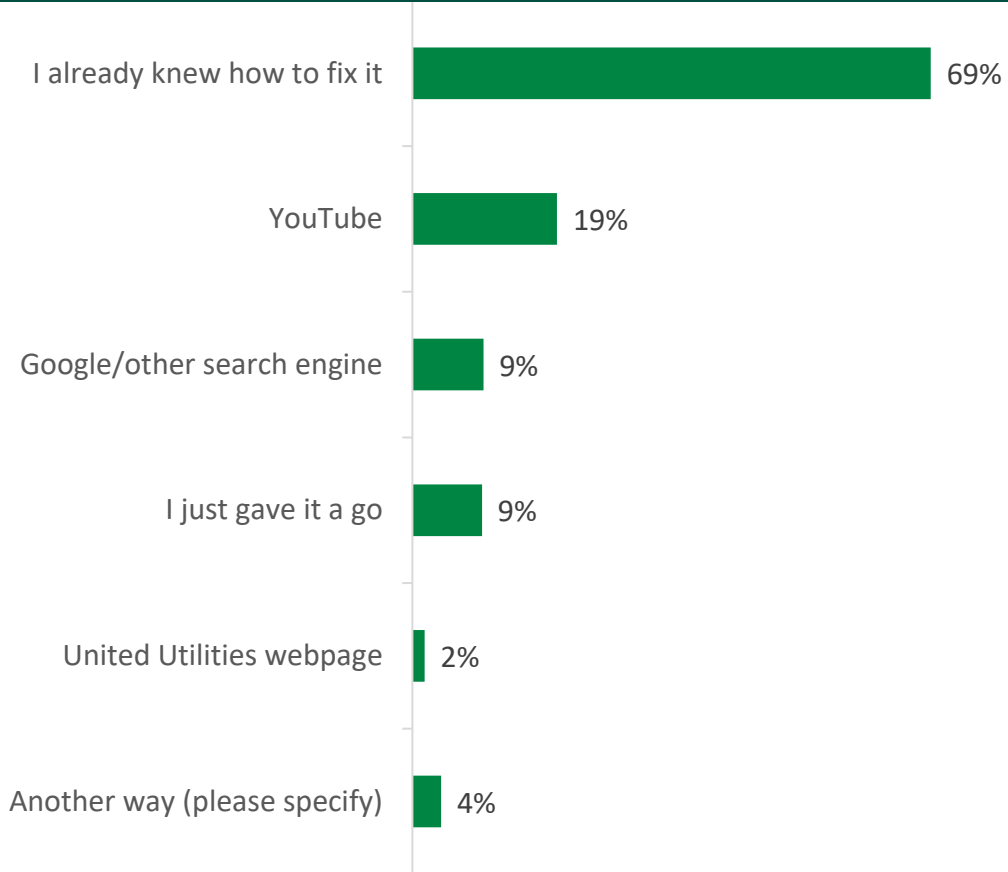


Base: All respondents who fixed their leak (397) Q02 Where was the leak located? Q03 Which of the following actions, if any, did you take to fix the leak? Q05 How was the leak repaired?

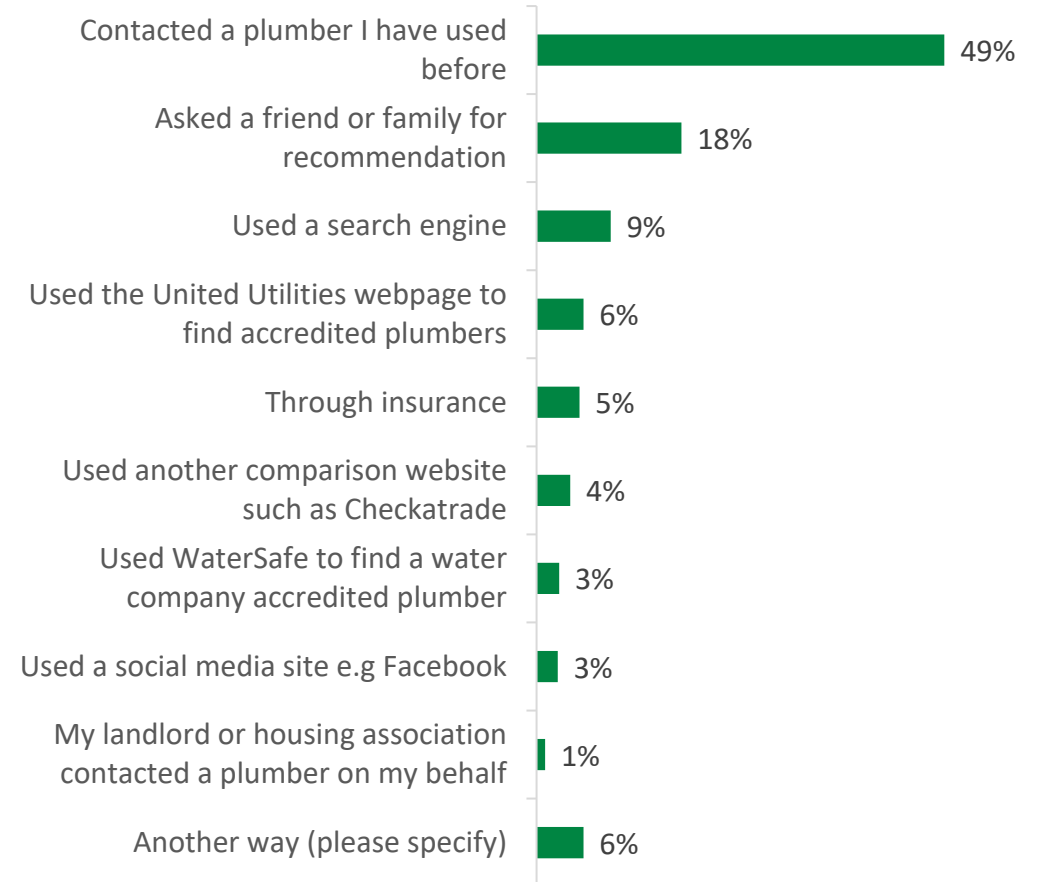
Personal experiences with leaks in the home – Leak Fixers

Over two-thirds of those who fixed the leak themselves said that they had prior knowledge of how to do so. YouTube is the second most popular source for information. Elsewhere, almost half of those who contacted a plumber used one that they had used before.

Sources of knowledge if fixed leak themselves



Method of finding suitable plumber, if used



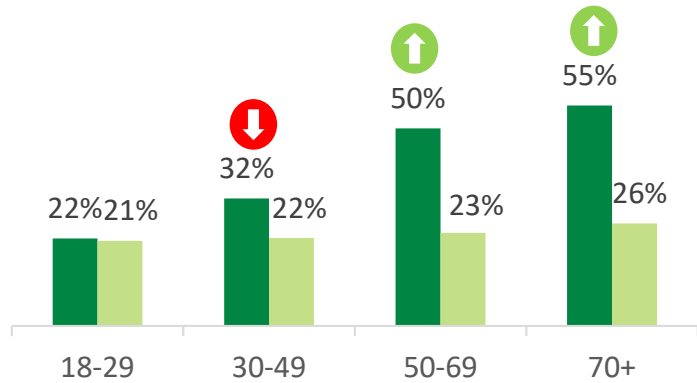
Base: All respondents who made their own repairs (93) Q04a How did you learn how to do the repair? Base: Those who contacted a plumber (202) Q04b How did you go about contacting a plumber?

Action taken - Demographics

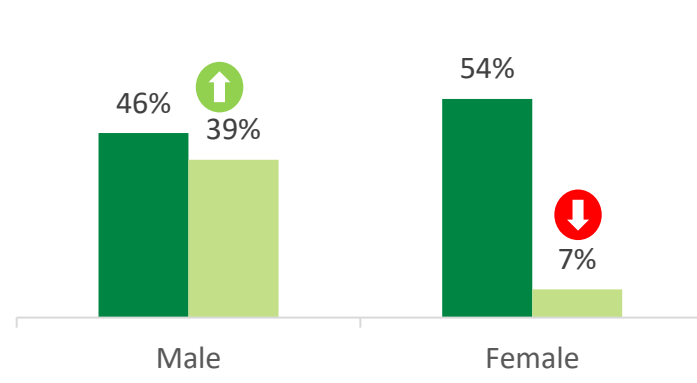
Those earning under £21k are significantly more likely to contact a plumber than those earning £40k - £79,999 (58% cf 41%). Conversely, those in this higher bracket are significantly more likely to fix a leak themselves than customers in the lowest income band (33% cf 14%). Moreover, those aged 50+ are far more likely to call a plumber than fix a leak themselves.

■ I contacted a plumber
 ■ I fixed it myself

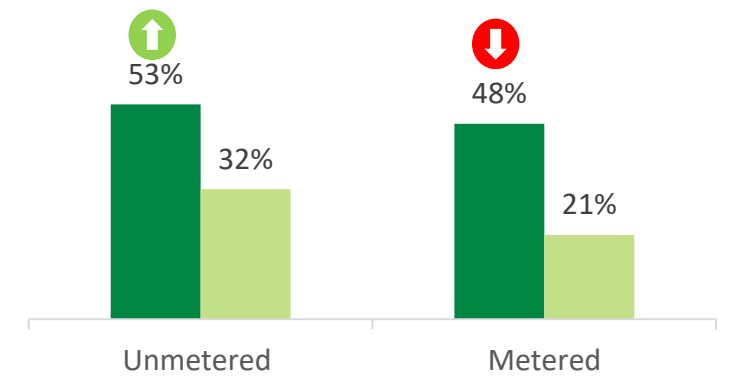
Age



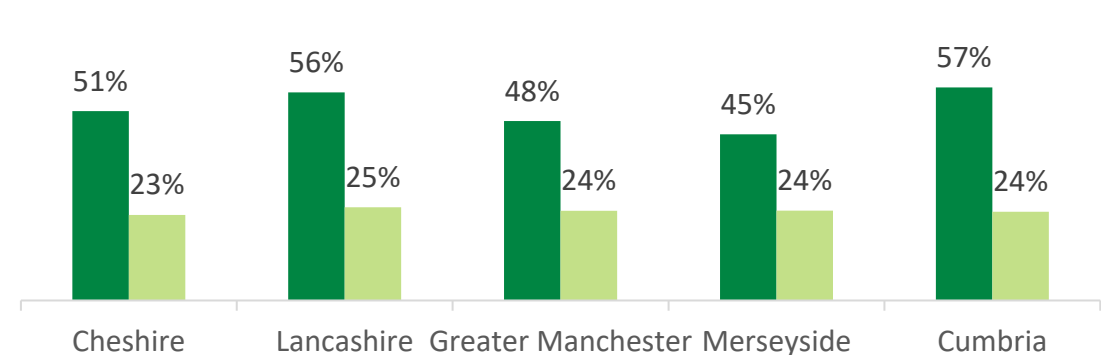
Gender



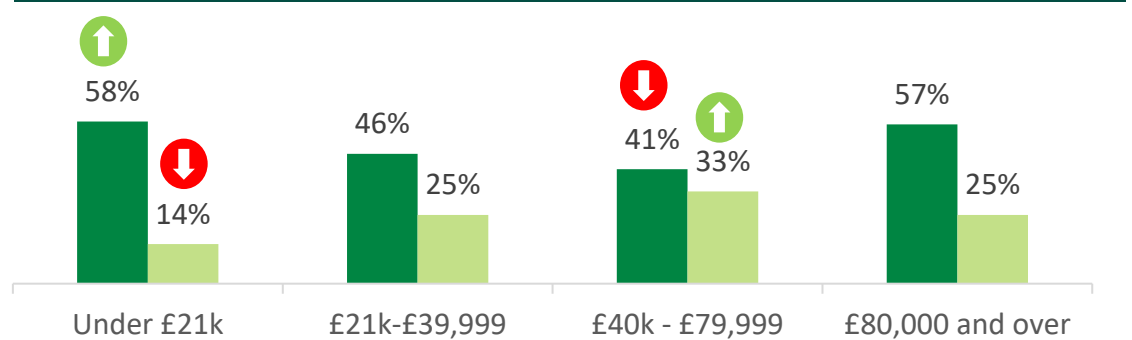
Meter status



Region



Income band



Base: All respondents who fixed their leak (397) Q03 Which of the following actions, if any, did you take to fix the leak?

↑ Significantly higher than comparator ↓ Significantly lower than comparator

Personal experiences with leaks in the home – Leak Fixers

Getting leaks fixed is largely seen as a high priority job, but motivations centre less around cost implications, and more around irritation or a general sense of obligation for keeping the house in order.

Level of priority

There is a general worry amongst all customers that a leak may lead to more serious damage, with this forming the basis of concerns when a leak is identified. Customers immediately think about finding the source of the issue and identifying the cause of the leak.

Intervention

Though many customers can pinpoint the cause of the leak themselves, the majority prefer to rely on plumbers for fixing it. Those who say they will fix it themselves tend to have prior experience or are confident in their own DIY skills.

The main reason for customers choosing not to fix a leak themselves is a lack of skills/confidence, and a worry that they would only exacerbate the issue.

Those who contact plumbers tend to use one they have previously used or have a personal relationship with.

Awareness of currently available fixes for leaky toilets is low, with only those who have previously encountered the issue having knowledge of solutions.

“ I think you panic in case it does any more damage. You don't want to go through the rigmarole of calling up the water board – you want it done there and then.”

Metered Leak Fixer

Metered v Unmetered

For metered customers, fixing the leak is seen as a relatively high priority, particularly in instances where participants knew what the issue is and/or are monitoring their daily water usage after having been informed by UU that their consumption has increased.

The unmetered group express differing views, with urgency mainly stemming from the irritation of the sound of dripping water. Some worry about contacting a plumber because of the cosmetic damage it could potentially cause.

"All I'd hear all night was dripping. It got to a point where I would but a sponge there before I went to bed because it was annoying me that much."

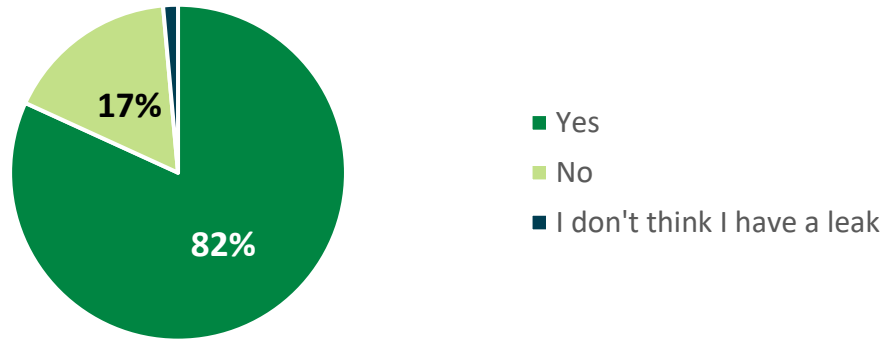
Unmetered Leak Fixer

Leak Ignorers

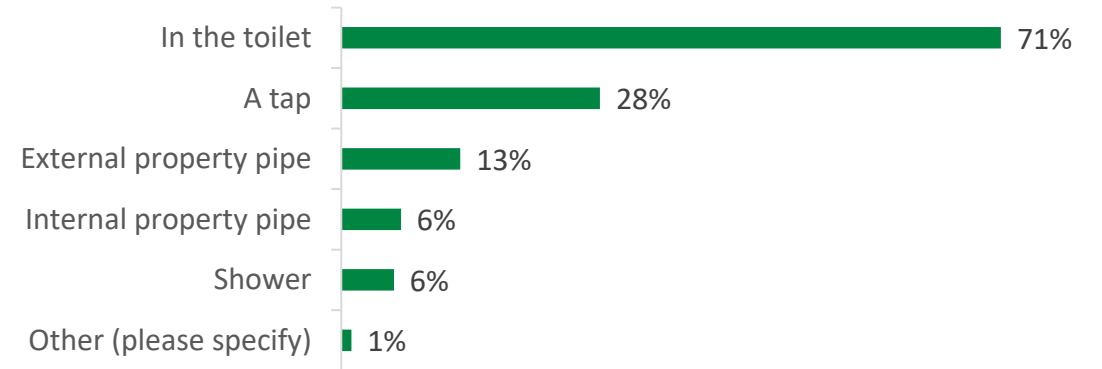
Personal experiences with leaks in the home – Leak Ignorers

Over 8 in 10 Leak Ignorers are aware of the location of their leak, with 71% being in the toilet. The main reason that this group of customers have not fixed the leak in their homes is a lack of knowledge on how to fix it themselves. Furthermore, almost a quarter of Leak Ignorers say that they cannot currently afford to get the leak fixed.

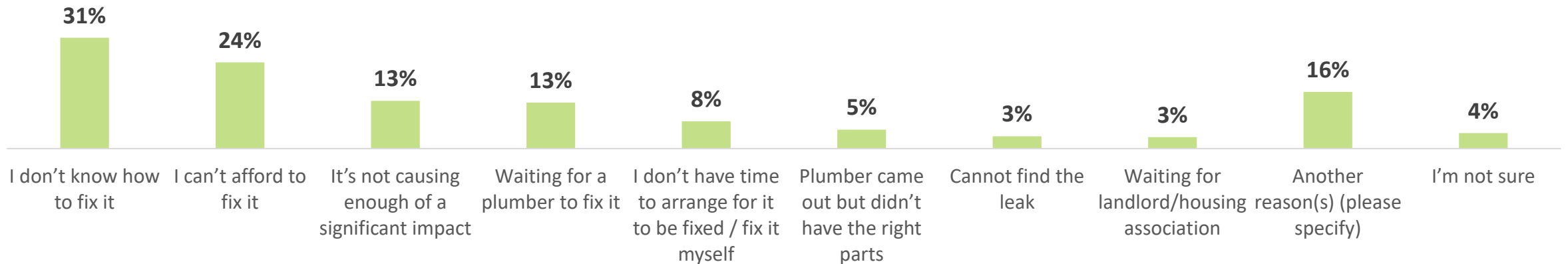
Aware of leak location



Leak location



Reason leak hasn't been fixed



Base: All who have ignored a leak (51) Q06 Do you know where the leak is in your home? Q08 What are the reasons you have not fixed the leak? Base: Leak ignorers who know where their leak was (42) Q07 Where was the leak located?

Personal experiences with leaks in the home – Leak Ignorers

Leak ignorers have mixed opinions on the urgency of fixing leaks. Their prioritisation is heavily influenced by the severity of the leak and the potential damage it could cause.

Level of priority

This group is split in terms of feelings of urgency to get the issue fixed. Half of the Leak Ignorers see this as a low priority task due to being largely inconsequential to their every day lives, whereas the other half see it as a high priority due to the potential damage that has (or could have) been made as a result.

Intervention

Level of action taken depends on the severity of the issue and the consequential level of priority stated. For those with minor leaks, such as within toilets or radiators, no action has been taken. For larger, more problematic leaks, customers are in the process of having leaks addressed, but have encountered issues with escalating the issue with landlords and housing associations. In both cases, United Utilities has been contacted, on the recommendation of family members.

As evidenced in the quotes to the left, cost also forms part of the reasoning against addressing leaks. Customers would rather look to fix it themselves or put in place temporary solutions to avoid the cost of hiring a plumber. However, it is worth noting that customers had not yet sought a quote for the work that would need to be done. These comments are based on assumption.

Awareness of currently available fixes for leaky toilets is low. However, customers do recognise the current types of syphon used when presented with a photograph.

"I've just left it as it is. I think getting it fixed will be quite expensive if I get a plumber around so instead, I just keep refilling the pressure in the boiler and it starts working again."

Leak Ignorer

"I basically got in touch my landlord, and they kept fobbing me off, telling me someone's expected to come round but no one ever turned up"

Leak Ignorer

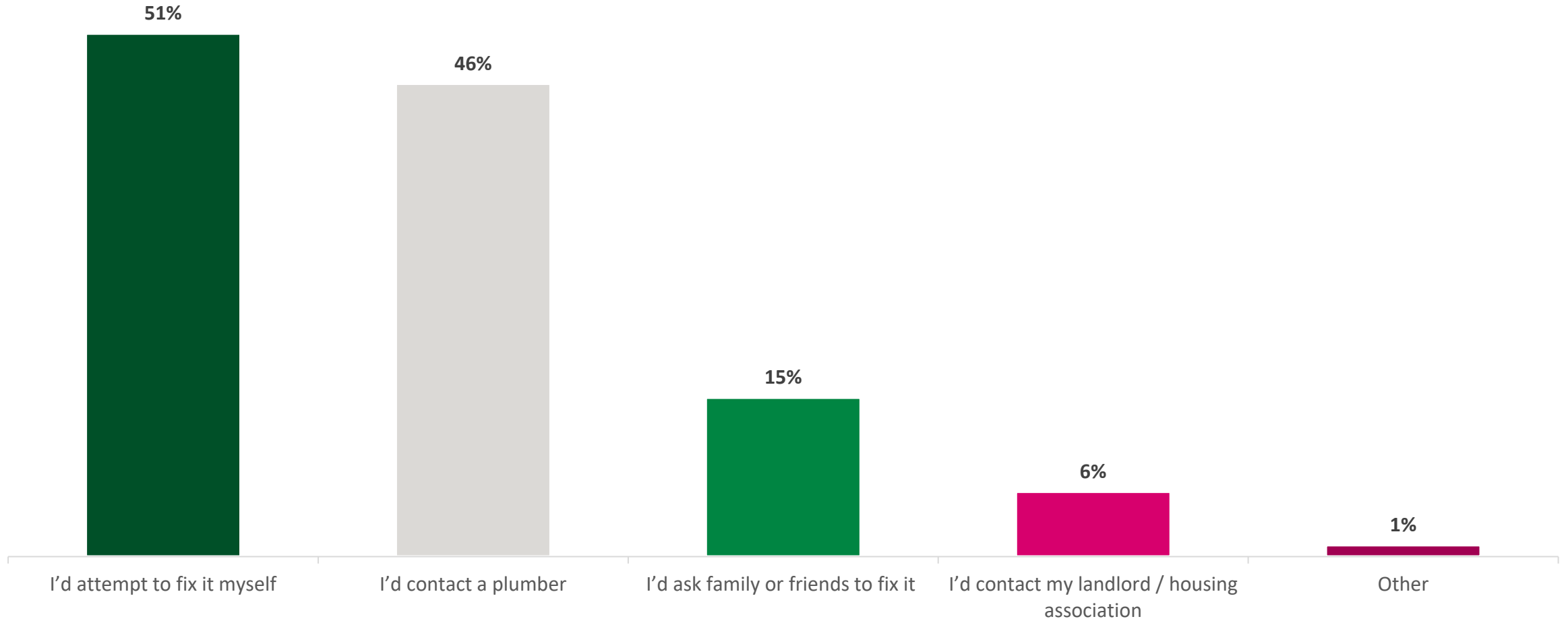
"It's just been put on the back burner. But it's been leaking for too long, probably four or five months now. I would do it myself - I won't call a plumber out because of the cost."

Leak Ignorer

Hypothetical Leak Customers

Hypothetical action to fix the leak

Contrary to findings observed amongst leak customers, half (51%) of those who have not had a leak believe that in such an event, they would fix it themselves. Contacting a plumber makes up the next most likely action with just five percent less saying that they would do so (46%).



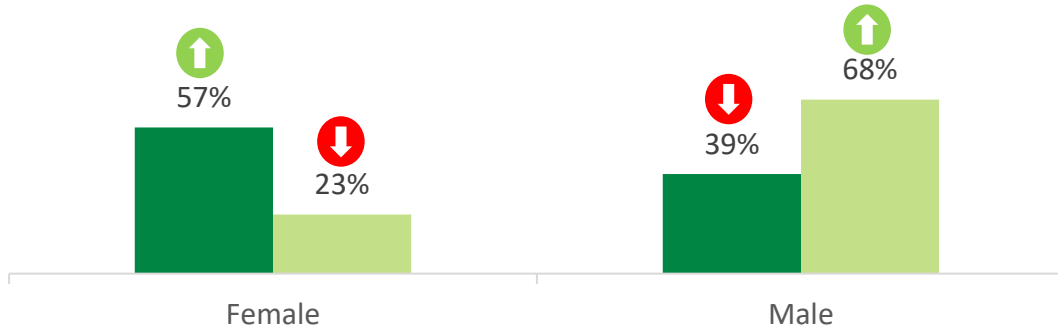
Base: All hypothetical leak customers (1250) Q011 What actions, if any, would you take to fix the toilet leak?

Action taken - Demographics

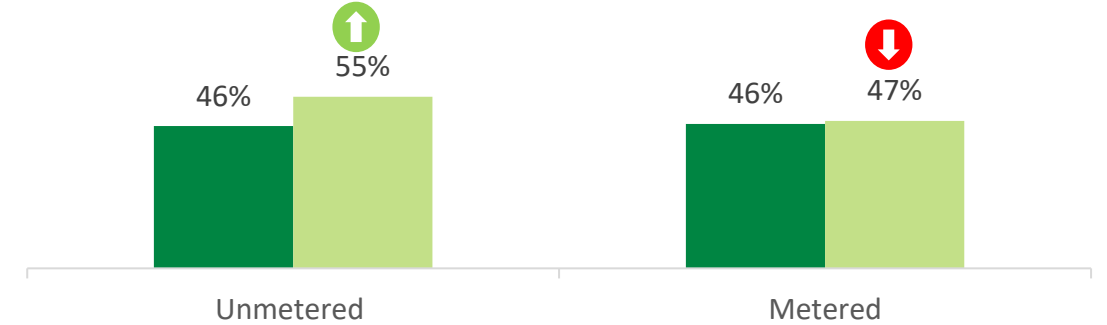
Females are significantly more likely to consider contacting a plumber (57%) than Males (39%), who, conversely, are significantly more likely to consider fixing themselves (68%) than females (23%).

- I'd contact a plumber
- I'd fix it myself

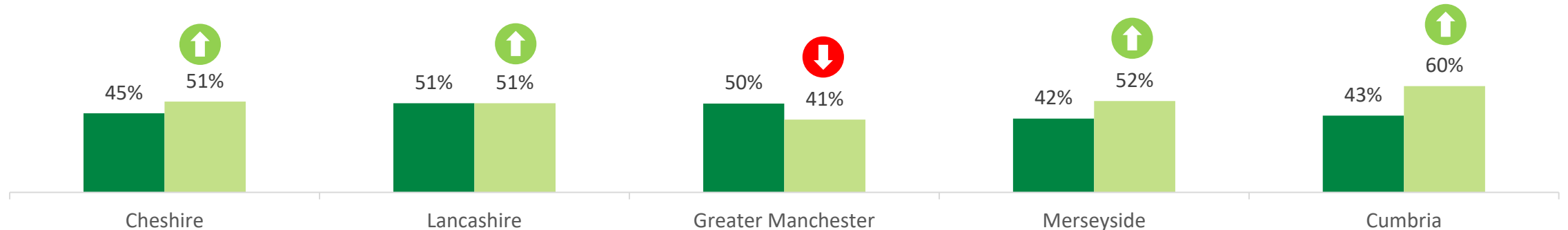
Gender



Meter Status



Region



*Note – only significant differences with representative sample sizes are displayed. Those 18-29 are significantly less likely than any other age group to attempt to fix a leak themselves. However, the sample size for this age group is very low (<15), meaning that comparison should be made with caution.

Base: All Hypothetical Leak Customers (1250) Q011 What actions, if any, would you take to fix the toilet leak?

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↑ Significantly higher than comparator ↓ Significantly lower than comparator

Action taken – Demographics – Income and SEG

■ I'd contact a plumber
 ■ I'd fix it myself

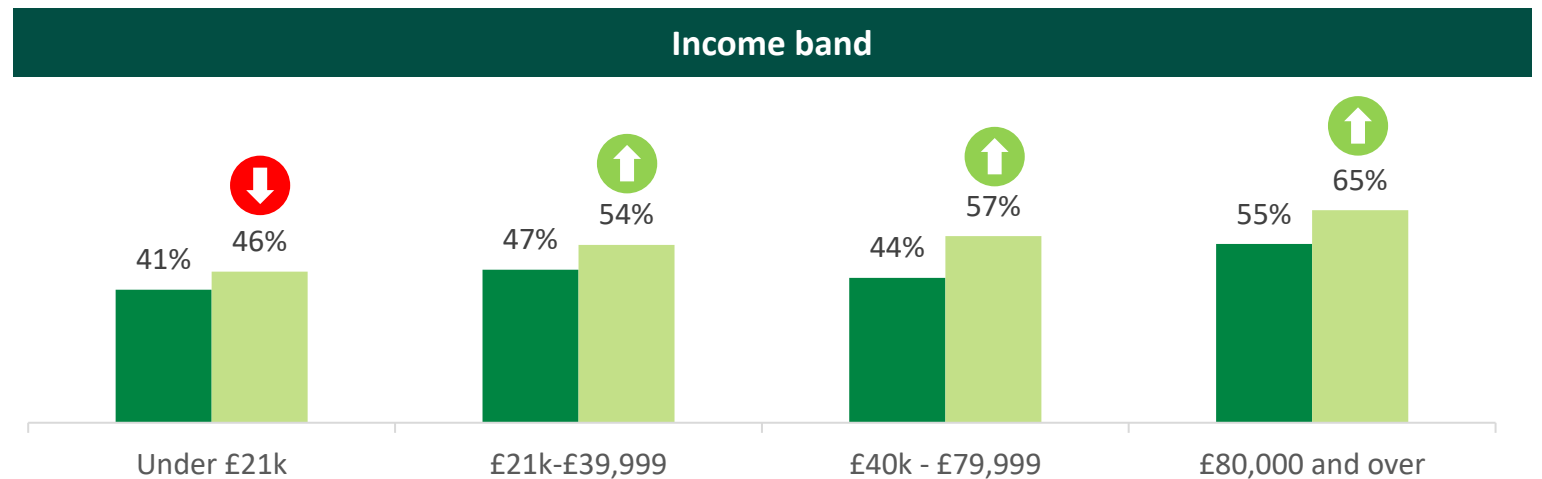
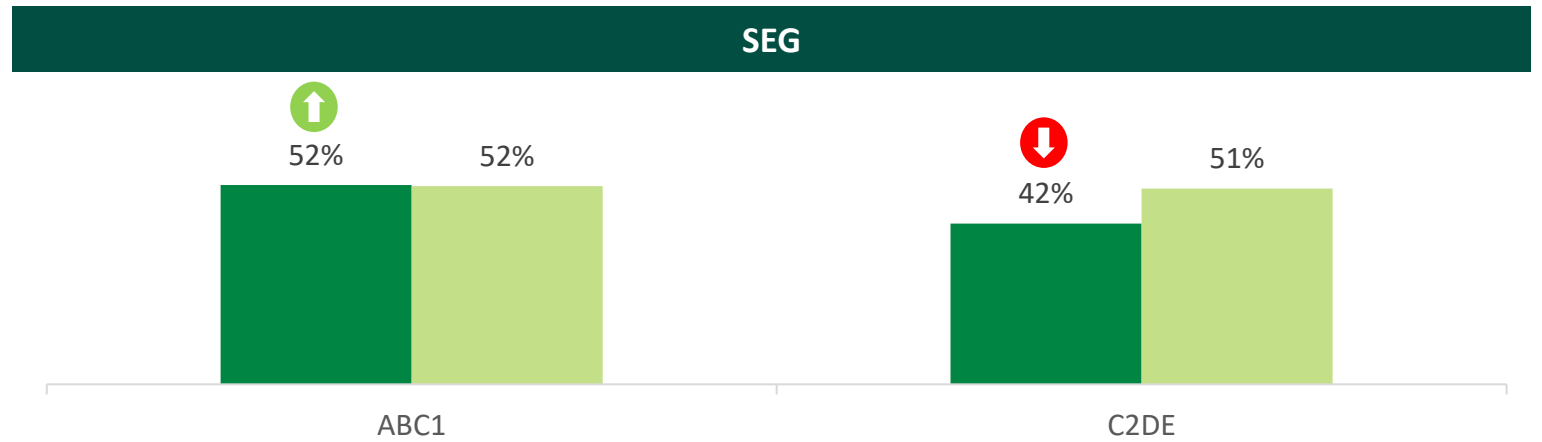
Income and SEG explained

Those on higher incomes (£21k +) are significantly more likely to hypothetically fix a leak themselves.

At the same time, customers in lower SEG bands (C2, D and E) are less likely to contact a plumber.

Though this may seem contradictory, SEG is based on job role and seniority rather than income level. As a result, plumbers and handymen will fall into SEG C2DE.

Consequently, it is unsurprising that those in C2DE would be more likely to fix a leak themselves as this encompasses those that do this for a living and are more likely to possess DIY skills.

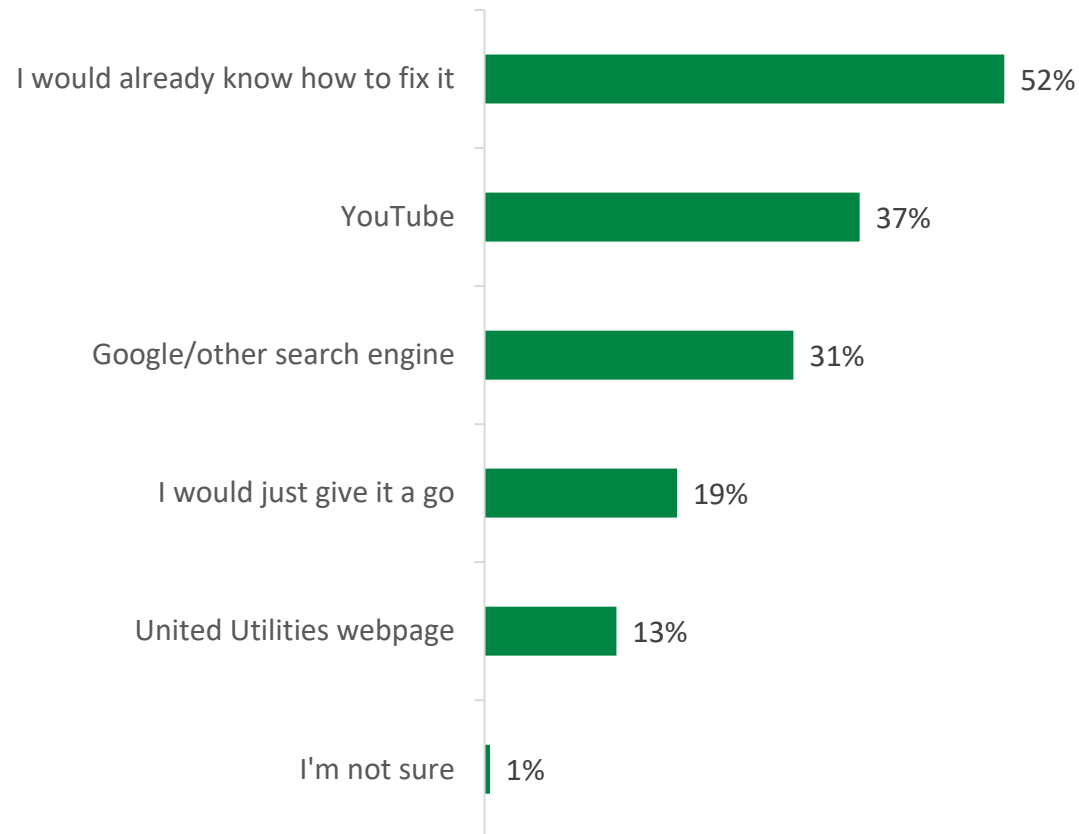


Base: All Hypothetical Leak Customers (1250) Q011 What actions, if any, would you take to fix the toilet leak?

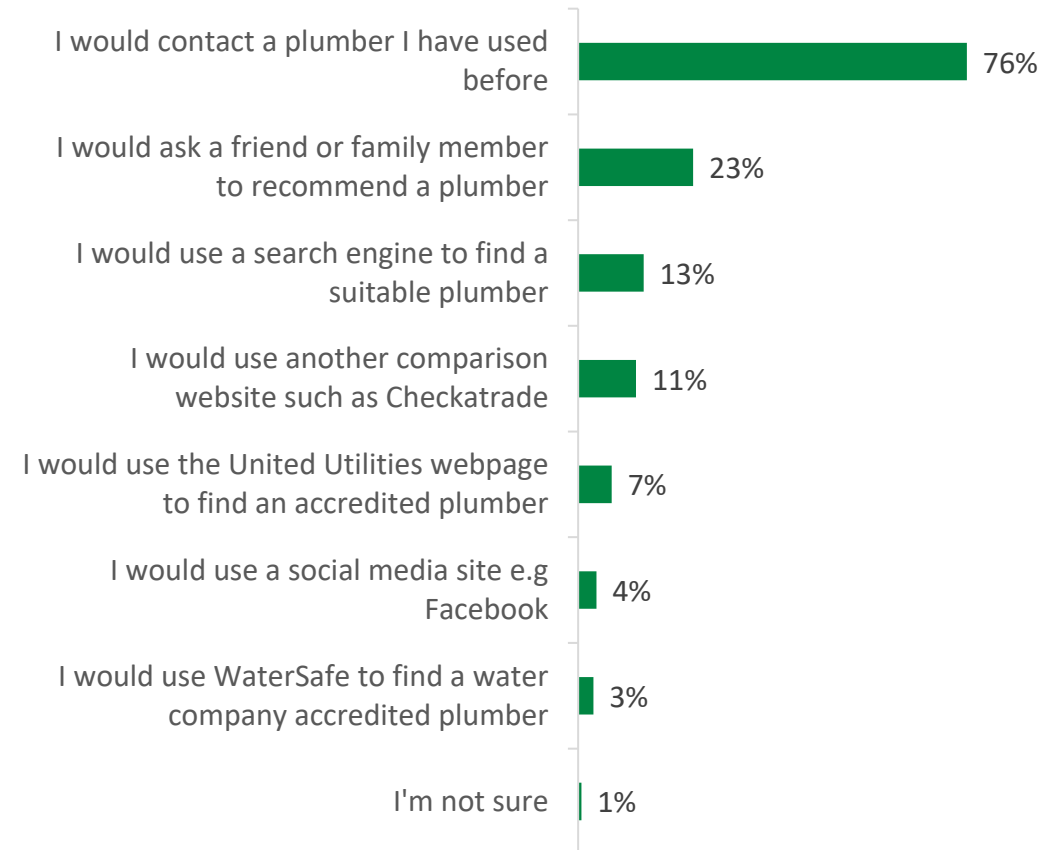
Hypothetical action to fix the leak

Just over half of those who say they would fix a leak themselves state that they believe they'd already know how to do so. YouTube is once again seen as the second most popular source for information (37%). Elsewhere, the majority turning to a plumber would contact one they've used previously.

Sources of knowledge if would fix leak themselves



Method of finding suitable plumber



Base: Hypothetical leak sample who would fix a leak themselves (616) Q012 How did you learn how to do the repair? Base: Hypothetical leak sample who would contact a plumber (587) Q013 How would you go about contacting a plumber?

Personal experiences with leaks in the home – Hypothetical

Getting leaks fixed is largely seen as a high priority job. Most would opt to contact a plumber, though some would try to diagnose the issue themselves first.

Level of priority

Fixing leaks would be a priority for the group, either because of the annoyance caused (by leaking taps), the amount of water wasted, or the extra cost this could add to their water bill. The general feeling is that if a leak is identified it should be fixed as soon as possible.

Intervention

Most state that they would contact a plumber if a leak arose. They would find an appropriate plumber in one of the following ways:

- Local village/area noticeboards,
- Recommendations from friends, family or neighbours,
- General word of mouth recommendations,
- Social media platforms like Facebook.

Some members of the group would try to identify the issue themselves, then making a judgement call on whether it would be something they could fix or whether it would be necessary to contact a plumber. Sources of information for fixing leaks if attempting to fix themselves include general google searches, manufacturer websites and retailers like B&Q.

Awareness of currently available fixes for leaky toilets is low, with only those who had previously encountered the issue having knowledge of solutions. Two of the group recall things they had seen online or heard on the radio about fixing leaks, but their recollection is vague.

Metered v Unmetered

There are no stark differences between metered and unmetered customers, other than mentions of cost when assessing level of priority to fix the leak.

“If a tap is dripping, I wouldn’t think it’d waste that much. It’s more that it’s annoying”

Hypothetical Leak Customer

“I would have a look but I’d get a plumber to do the work as you’d have to dismantle the whole bathroom to get to my cistern.”

Hypothetical Leak Customer

Perceptions of the syphon

Perceptions of the syphon

While opinions about the device are generally positive, concerns linger about technical aspects of the syphon and its compatibility with customers' toilets

Perceptions of the syphon

After reviewing the product, questions arise regarding its compatibility with various toilets, ease of installation and availability for purchase.

Particularly, those with more modern bathrooms mention that their cisterns are built into the wall, so accessing it would be incredibly difficult.

Concerns are also raised about the durability of the device's plastic components and their longevity over a 20-year span, with some expressing scepticism about their potential lifespan.

Customers mostly feel that they would be unaffected if the dual flush button were to change to a single flush button. However, there are concerns about the usability. As people are generally familiar with dual flush toilets having two separate buttons, a single button design is often perceived as less intuitive due to its unfamiliarity. To add to this, the action of pressing and holding for a short flush is seen as counterintuitive, and customers worry that this would be a problem for themselves, their children, and their guests.

Group differences

Leak fixers show more hesitancy and scepticism towards the syphon than Hypothetical customers, who are generally positive.

Interestingly, the unmetered group focus more on the potential cost of the product and are more vocal about the possibility of subsidised installation costs and integrating the syphon into new toilets.

Unmetered customers express more concern about the new button's intuitive operation.

"It seems like there's too many moving parts there, really. If part came off, you'd then have to replace it. You don't know how long it would last."

Leak Fixer

"That would create an issue with children – at 2 years old, I don't know how I'd teach my child. If you had to hold it down for a short flush, in the end, every flush would end up being a long flush because he wouldn't understand."

Unmetered Leak customer

"I think fitting would be an issue. If they were going to roll this out, I think they'd have to subsidise the fitting because most people aren't going to understand the concept."

Unmetered Leak customer

"They've brought out something new and more sustainable and something that's gonna last so yeah, I would say it's good."

Leak Ignorer

Perceptions of the syphon

"I'm very sceptical about what I've read here as to why this is any better than the existing ones."

Leak Fixer

"I feel that people who aren't tech-savvy or DIY-savvy will have difficulties installing it."

Unmetered Leak customer

"I don't think it would make any difference for me or my son because he just presses it."

Hypothetical Leak customer

"With this new one, it looks much bigger, so we'll really have to replace the cistern or get a new toilet."

Leak Ignorer

"Depends how much each unit is worth because if you have a few toilets in your house, it's going to be quite expensive."

Unmetered Leak customer

"I don't think that'd fit inside my toilet. There's very restricted room inside my toilet and that's quite tall."

Unmetered Leak customer

"If it gets the backing of the United Utilities, it must be a decent product."

Leak Ignorer

"If you went to B&Q to buy a toilet and UU had supported the inclusion of the syphon, that would help."

Unmetered Leak customer

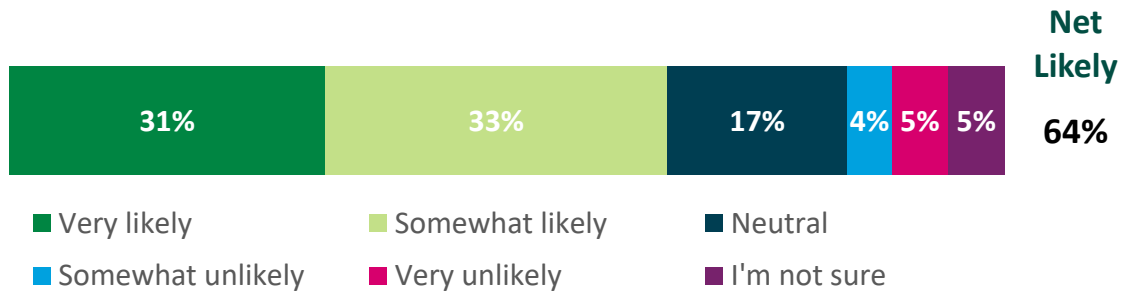
"I'm a little bit dubious about whether it will last the distance because it is made of plastic."

Leak Fixer

Likelihood of customers using the syphon

The majority of customers show a high level of likelihood of using the syphon if they were to encounter a toilet leak in the future (64% NET: Likely). However, over 2 in 10 customers either give neutral ratings or say that they are unsure, perhaps signalling some ambiguity around the product and its ease of installation.

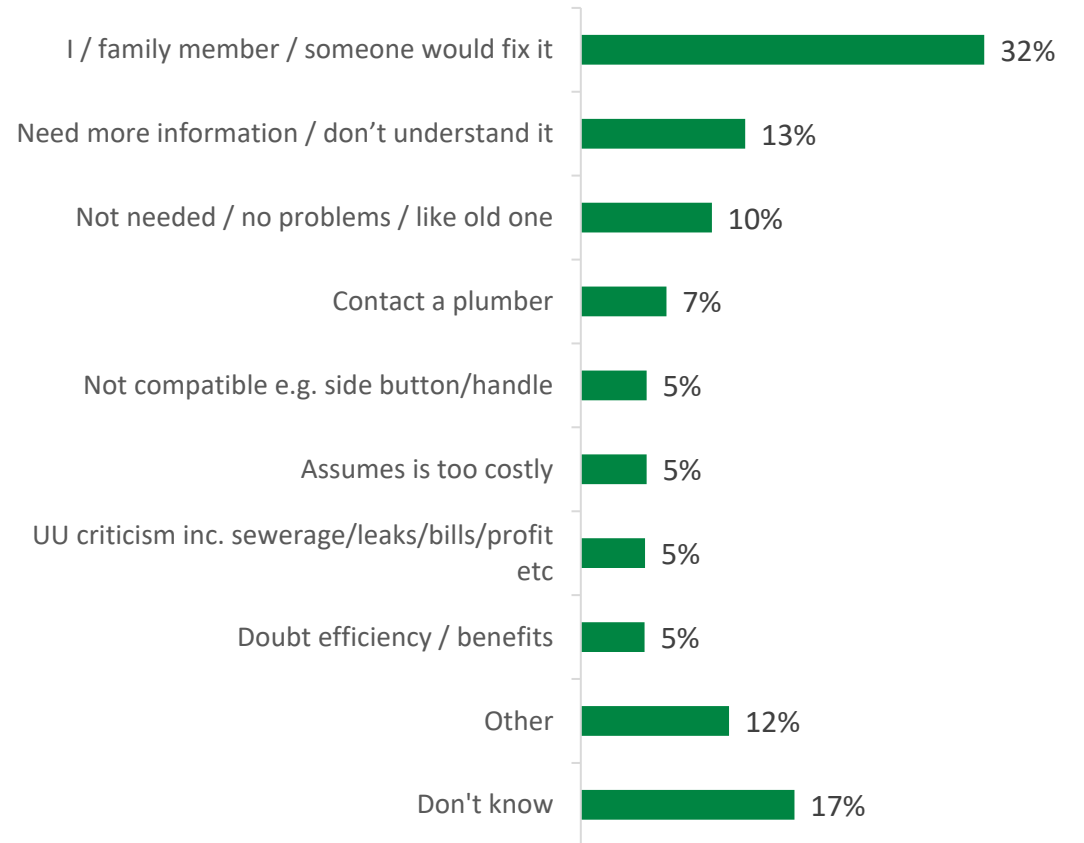
Likelihood of using the syphon



“I could fix the leak using conventional methods, replacing cistern parts etc.”
Leak Fixer

“Just added costs we can't afford to put on already stretched finances.”
Unmetered Leak Customer

Reasons for low likelihood of use



Base: All respondents (1698). Q014 If you were experiencing a leaking toilet, how likely, or unlikely would you be to use this product? Base: All respondents who would be unlikely to use the syphon (167). Q015 Why would you be unlikely to use the product?

Likelihood of customers using the syphon - Demographics

Demographic differences exist between those of different age groups, region, SEG and meter status.

	Female	Male	18-29	30-49	50-69	70+	Leak fixers	Leak ignorers	Hypothetical
Likely	64%	64%	54%	70%	66%	61%	68%	88%	61%
Unlikely	9%	10%	24%	8%	9%	11%	8%	5%	11%

	Cheshire	Lancashire	Greater Manchester	Merseyside	Cumbria	Urban	Coastal	Rural
Likely	68%	64%	63%	66%	56%	64%	61%	63%
Unlikely	8%	10%	10%	8%	14%	9%	13%	11%

	ABC1	C2DE	White	MEG	Unmetered	Metered
Likely	70%	60%	65%	64%	57%	69%
Unlikely	7%	11%	9%	9%	12%	8%

Sub-group analysis

Those aged 30-49 are significantly more likely to use the syphon than those aged 70+ (70% cf 61%).

Likewise, customers living in Cumbria are significantly less likely to use the syphon (56%) than those from Cheshire (68%), Lancashire (64%) and Merseyside (66%).

Those in socio-economic group ABC1 are significantly more likely to use the syphon (70%) compared to C2DE (60%), as are metered customers (69% cf 57% unmetered).

Significantly higher than comparator

Significantly lower than comparator

Base: All respondents (1698). Q014 If you were experiencing a leaking toilet, how likely, or unlikely would you be to use this product? Base: All respondents who would be unlikely to use the syphon (167). Q015 Why would you be unlikely to use the product?

Likelihood of customers using the syphon

Most customers would be willing to purchase the syphon, but would be most likely to do so in the event of a leak. Concerns regarding installation are prominent, with many stating that they would get a professional to fit it.

Likelihood of using the syphon

Though most groups say that they would use the product, many participants express reluctance to install the device themselves due to perceived complexity, preferring to enlist a plumber for the task. They cited barriers such as water supply isolation, cistern draining, and tool requirements. Doubts are voiced regarding the feasibility of completing the installation within an hour and the device's ability to fulfill its advertised functions.

Most respondents express a willingness to purchase the syphon in the event of a leak, contingent on its price, though some question whether they would see it as a necessity in the current economic climate.

Group differences

Concerns around practical challenges arise in all four groups. However, the Leak Fixers' and unmetered leak customers' concerns are more centered around the technicalities of the product itself (e.g. compatibility, durability and effectiveness), whereas Hypothetical Customers and Leak Ignorers are more likely to focus on their own ability to install it independently.

"As a tenant, I wouldn't buy this because I'm not sure if I'd be in the same place long-term."

Leak Fixer

"It's an unnecessary cost considering the climate we are in at the moment."

Unmetered Leak Customer

"Yeah, I would use it. I'd definitely give it a try if the price is right. I won't pay double for that compared to a normal one."

Leak Ignorer

"Knowing that it's a fix and that it lasts a long time, I would be inclined to say I want it at the point of having a leak. I wouldn't go out of my way to spend money now when I don't have a problem."

Unmetered Leak customer

Likelihood of customers using the syphon

"If you bought this product, would United Utilities send out someone to fit it for you, like companies like Sky do? I think that would be the way forward. Then they could actually charge a little more."

Leak Fixer

"I'd wait until it had been on the market a good few years, all the problems had been resolved, and had it been tweaked, and then I might think about it."

Hypothetical Leak Customer

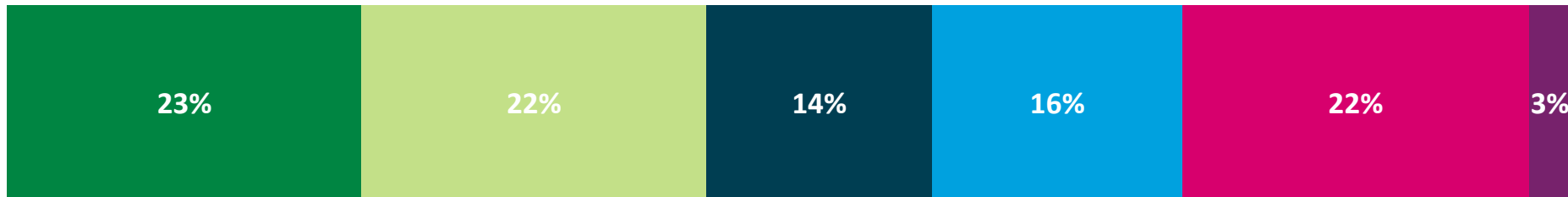
"I'm still struggling to believe that it would do what it says it's going to do."

Leak Fixer

Confidence in installing the syphon

Upon seeing the instructional video, a higher proportion of customers reported feeling confident that they could install the syphon themselves than not confident (45% confident cf 38% not confident).

Confidence installing the syphon



Net Confident

45%

Net Not Confident

38%

■ Very confident ■ Somewhat confident ■ Neutral ■ Not very confident ■ Not at all confident ■ I'm not sure

Base: All respondents (1698). Q017 How confident would you feel about installing the syphon yourself?

Confidence installing the syphon - Demographics

Demographic differences exist between those of different gender, age group, and customer group.

	Female	Male	18-29	30-49	50-69	70+	Leak fixers	Leak ignorers	Hypothetical
Confident	23%	60%	46%	56%	46%	41%	37%	34%	48%
Not confident	61%	22%	44%	23%	37%	42%	41%	46%	37%

	Cheshire	Lancashire	Greater Manchester	Merseyside	Cumbria	Urban	Coastal	Rural
Confident	47%	44%	43%	44%	48%	45%	41%	46%
Not confident	36%	37%	37%	41%	35%	39%	36%	37%

	ABC1	C2DE	White	MEG	Unmetered	Metered
Confident	47%	42%	45%	49%	47%	43%
Not confident	38%	39%	38%	39%	37%	39%

Sub-group analysis

Those aged 30-49 are significantly more likely to feel confident installing the syphon themselves than those aged 70+ (56% cf 41%). Such is the case for males, who are 37 percentage points more likely to report feeling confident with the installation.

Likewise, Hypothetical customers are significantly more likely to feel confident fitting the syphon (48%) than Leak Fixers (37%), and Leak Ignorers (34%).

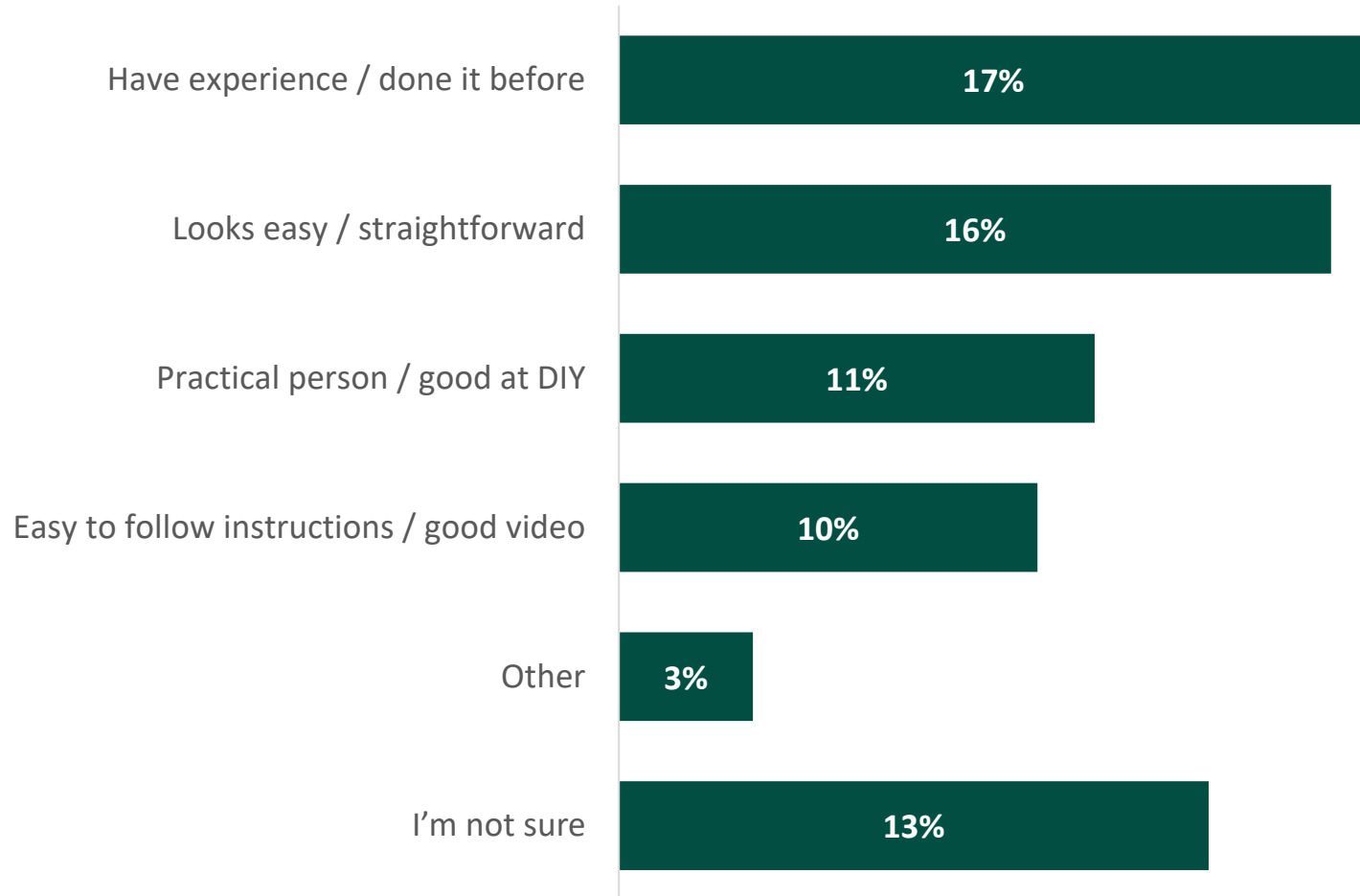
Significantly higher than comparator

Significantly lower than comparator

Base: All respondents (1698). Q017 How confident would you feel about installing the syphon yourself?

Customers' reasons for feeling confident

Of those who say they would feel confident, the biggest reason for saying so was that they have experienced the problem in the past and have fixed it before (17%). This is followed by reports that the fitting of the syphon seems simple enough for someone to fit themselves (16%)



“I have replaced a flush button similar to this before and the whole process is well demonstrated.”
Leak Fixer

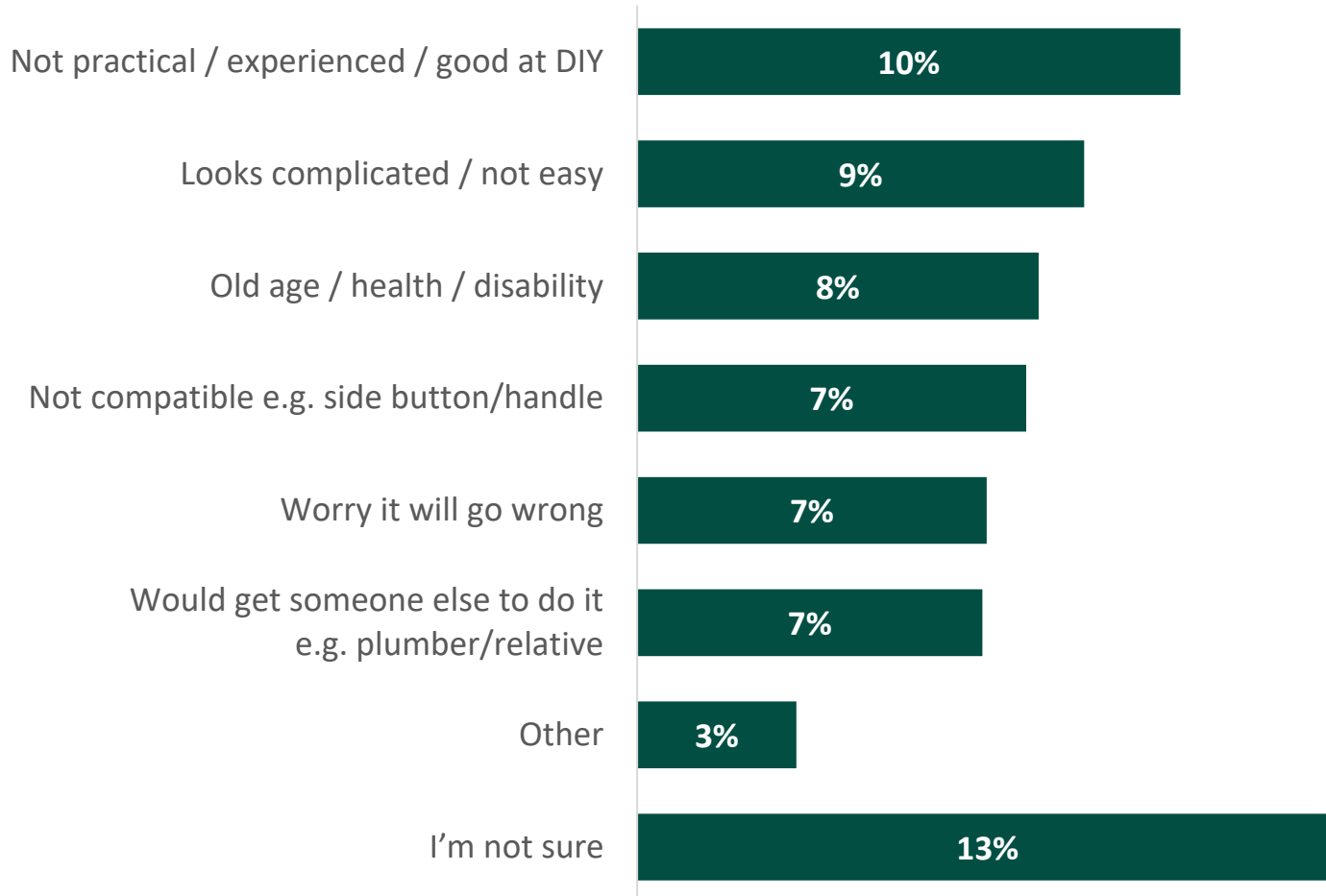
“The instructions were clear and explained carefully. Every step was shown.”
Leak Ignorer

“I've always been very practical, worked building submarines and will try my hand at anything now.”
Hypothetical Leak Customer

Base: All respondents who would feel confident / not confident to install (1393). Q018 Can you explain why you feel [confident / not confident] about installing the syphon yourself?

Customers' reasons for not feeling confident

One in ten customers who rate their confidence in installing the syphon as low do so because they believe they are not practical people and thus would not have the skills or knowledge required to successfully fit the product themselves.



“I generally have a go fixing these kinds of things, but it did not look easy. I think I might struggle..”
Leak Fixer

“Recently had to change a leaking flush valve on our toilet. Had to call a plumber to do it as it was not as easy as the videos makes it look! Mechanism did not release as easily.”
Leak Ignorer

“I have a boxed in cistern with push button fitted to the front face of the cabinet. Not at all like the flush in the video. How does the unit work for other types of flush?”
Hypothetical Leak Customer

Base: All respondents who would feel confident / not confident to install (1393), Q018 Can you explain why you feel [confident / not confident] about installing the syphon yourself ?

Customer confidence installing the syphon themselves

Customers have concerns about installation complexity and the need for professional assistance among less technically-minded or DIY-savvy individuals.

Confidence in DIY installation

After watching the video, some participants admit to lacking confidence in installing the device themselves and a few suggest that United Utilities provide installation services. Various challenges are highlighted, such as difficulty removing old parts, and the fear of making errors, particularly in cutting components.

Opinions are divided, with some preferring professional installation to avoid responsibility for any mishaps, while others are willing to take on the task. Ultimately, only a few feel completely confident in DIY installation, citing concerns about precision, skill, tools, and the maturity of the product.

Group differences

A higher proportion of Unmetered Customers and Leak Ignorers state that they would be willing to attempt installation, but customers in both groups still lack full confidence in their ability to do so successfully.

Demographically, males show much higher levels of confidence that they would be able to install the syphon themselves.

“The bit where you have to cut the stem off the button... I’d worry that I’d measure it wrong, cut off too much and then it wouldn’t work.”

Leak Fixer

“Naturally, you’d want someone to be responsible for something like that, so you’d call out a plumber. If they did it wrong, they’d have to come out and fix it at no extra expense, but it’s a one-shot wonder if you did it wrong.”

Unmetered Leak Customer

“I do a lot of jobs in the house but I wouldn’t tackle that because I know exactly what would happen – if it wasn’t just right, it wouldn’t work.”

Hypothetical Leak Customer

“Things don't come apart that easily when they've been there 10-15 years. You don't unscrew something like that so easily. I know that from experience.”

Leak Ignorer

Customer confidence installing the syphon themselves

“My concern would be with the cutting – there’s too much room for error there.”

Unmetered Leak Customer

“It just assumes that you’d have all of that equipment but in reality, a lot of us wouldn’t.”

Unmetered Leak Customer

“I think it’s a man’s job – I don’t think I could tackle it.”

Hypothetical Leak Customer

“If there was a problem, I would probably give it a go considering the cost of a plumber. However, if I didn’t have an issue, then I wouldn’t tamper with it – if it’s not broke, don’t fix it.”

Hypothetical Leak Customer

“I think my husband could do it if he watched the video.”

Leak Fixer

“The video shows it being fitted to a modern toilet, but mine is an old 1960’s style cistern so it’d be a case of having to replace the whole toilet.”

Hypothetical Leak Customer

“Personally, I think it should be advertised as ‘can be done by a competent DIYer’ or something like that... I don’t think it’s easy enough for someone with no experience.”

Leak Ignorer

“I’d only be able to do it and if I was watching on YouTube, stopping and pausing the video.”

Leak Ignorer

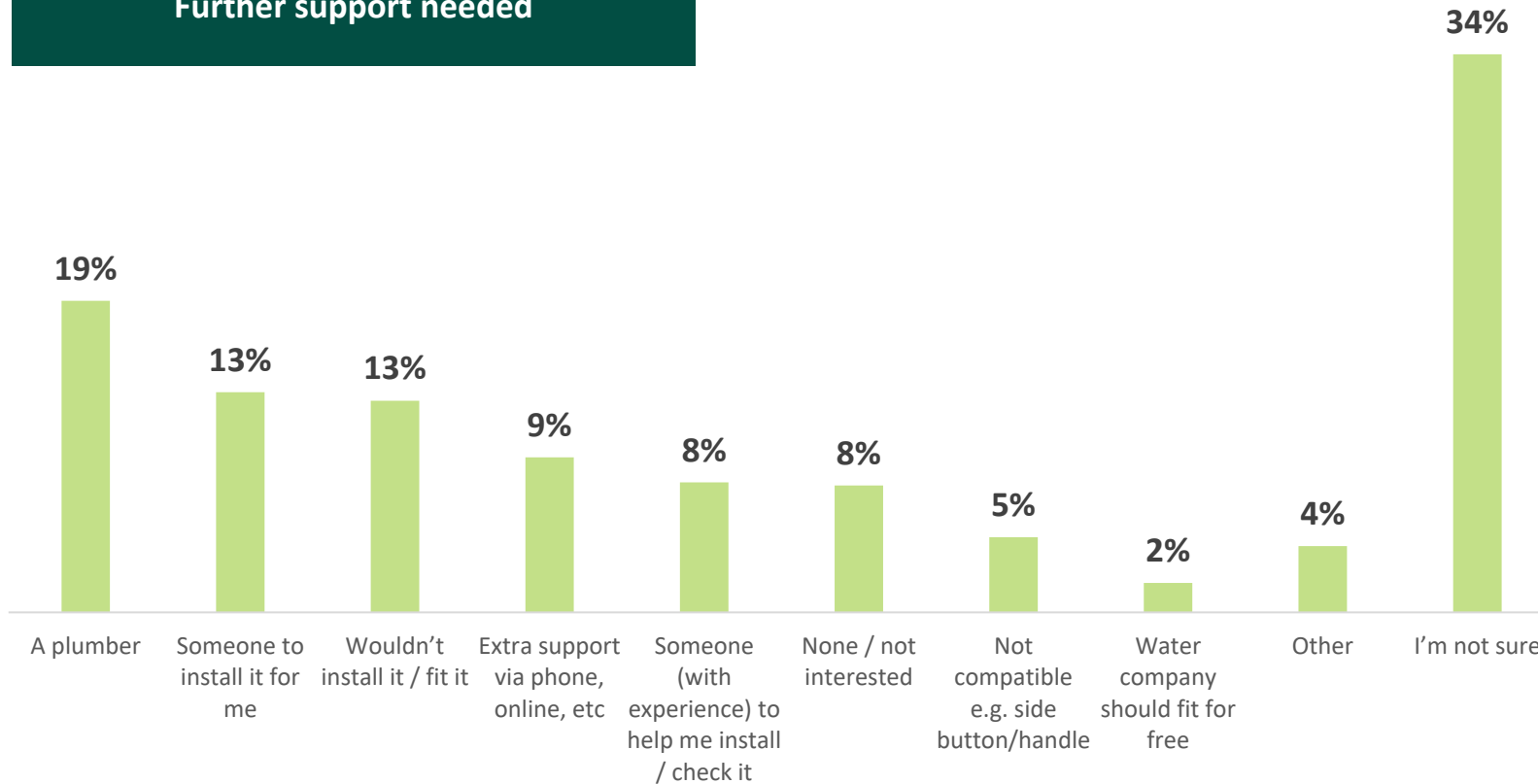
“Looking at the restriction of getting the old one out, than can be pretty difficult to get out. I don’t think it’s as easy as they make out in the video.”

Leak Fixer

Support required to increase confidence

Over a third of customers are unsure about what further support would help them feel more confident (34%). Elsewhere, 19% of customers believe that they'd approach a plumber for help.

Further support needed



Sub-group analysis

Those in younger age brackets are significantly more likely to look for support via phone, online or in video format (35% of 18-29 year olds, 20% for 30-49 year olds, 8% for 50-69 year olds and 9% for those aged 70+).

Additionally, those living in coastal locations are less likely to seek support in this way (1% cf 11% of urban customers and 8% of rural customers).

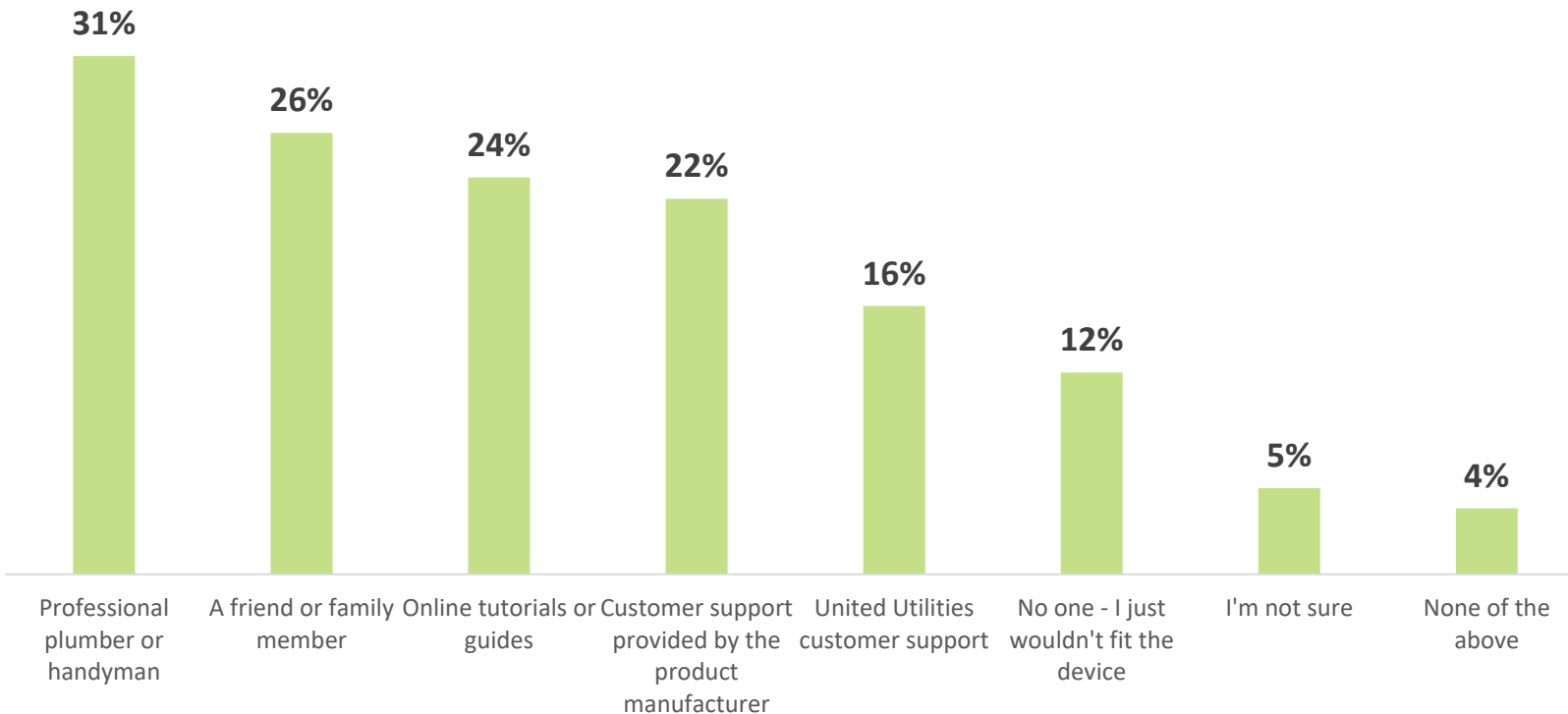
Customers in Greater Manchester are significantly less likely to look for support from a plumber (12%) compared to customers in Cheshire (26%), Cumbria (22%), and Lancashire (21%).

Base: All respondents who would not feel confident to install (632). Q018a What further support would you want in order to feel more confident about installing the syphon yourself?

Sources of assistance whilst installing the syphon

As seen in the previous question, plumbers or handymen would be the main source of assistance for customers if they were struggling to install the syphon (31%). A quarter (24%) would look for guidance online.

Sources of assistance



Sub-group analysis

Unsurprisingly, those aged 70+ are significantly less likely to look for online tutorials or guides (19%) than those aged 30-49 and 50-69 (both 27%).

Customers in Merseyside are significantly less likely contact a plumber or handyman for assistance (26%) compared to customers in Greater Manchester (34%) and Lancashire (37%).

Women are significantly more likely to turn to another **person** for support. Most notably, 34% of women would turn to a friend or family member compared to 21% of men. Conversely, men are more likely to turn to online tutorials or guides (30% cf 16% for women).

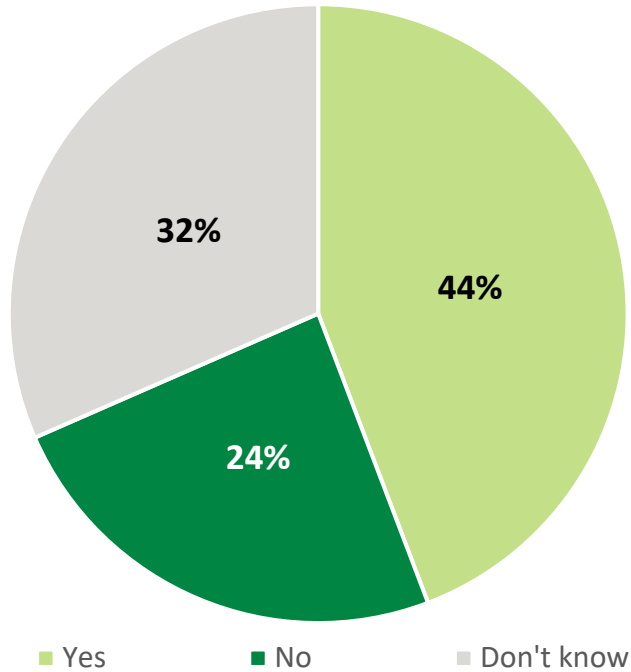
Base: All respondents (1698). Q019 If you were to encounter difficulties or have questions while installing the product, who would you contact for assistance?

*caution – low base size <20

Retrospective opinions of using the syphon to fix past leaks

Of those who have had leaks in their toilets in the past, 44% say that they would have used the syphon to fix that leak, had they been aware of it and it had been available in the past.

Would/wouldn't have used



"I wouldn't have attempted it unless it was shown to be compatible with my existing toilet."

Leak Fixer

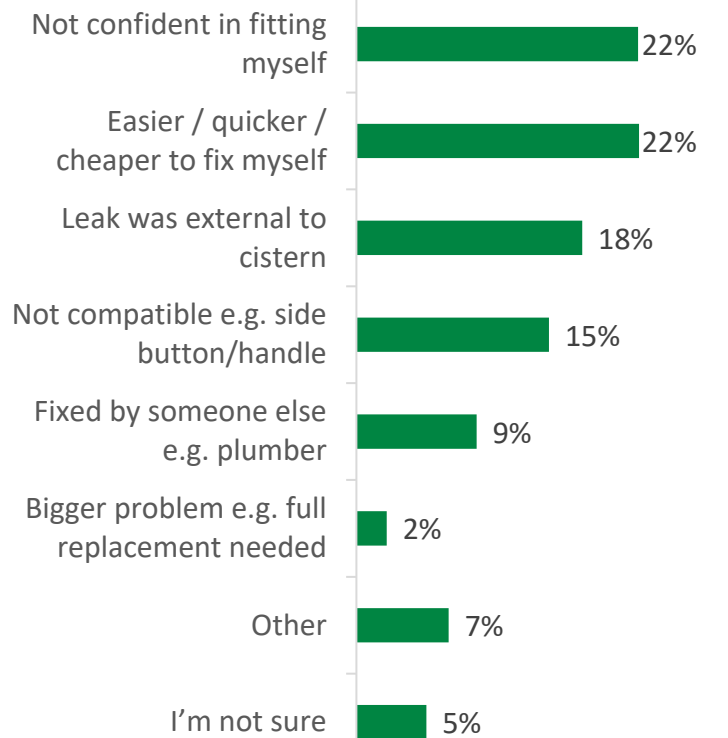
"The toilet in question is extremely old and in need of a full replacement. I will be replacing the full unit and therefore wouldn't waste time and money on this."

Leak Ignorer

"I prefer to use a professional incase I did something wrong and made the situation worse."

Leak Fixer

Reasons for not using

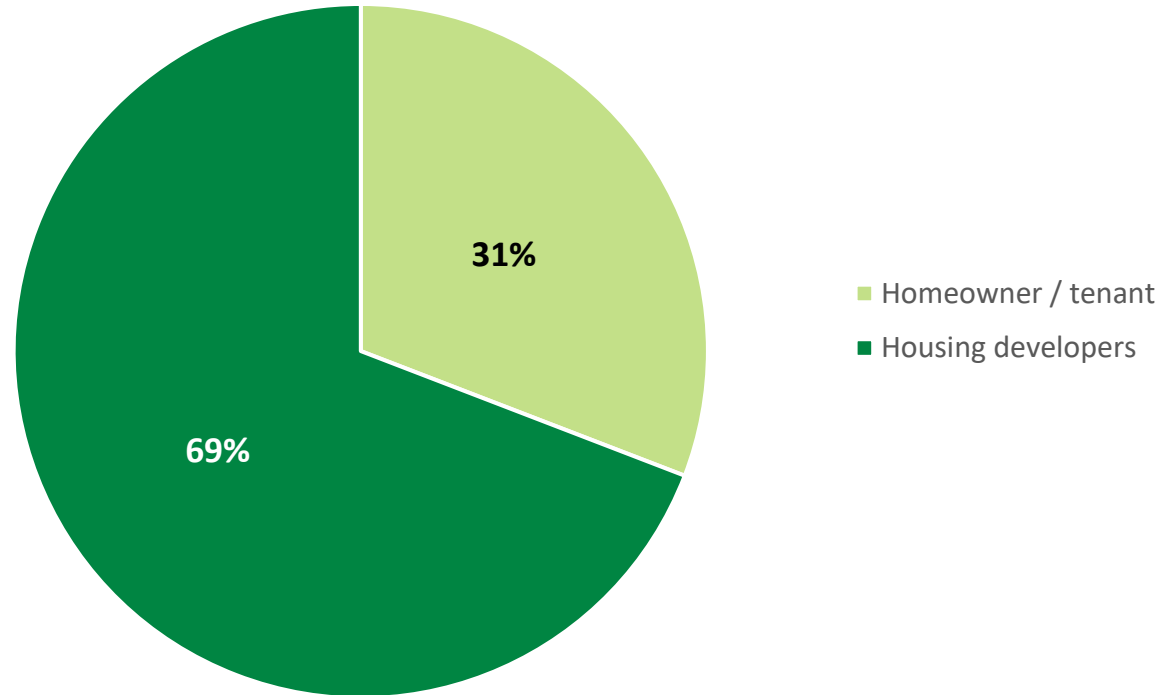


Base: Leak fixers and ignorers who had a leak from their toilet (276). Q20 Given that you have previously experienced a toilet leak, now that you are aware of the syphon, would you have used it to fix the leak in your toilet? Base: All respondents who would not have used product (62). Q20a Can you explain why you would not have used the syphon?

Responsibility of fitting the syphon

Almost 7 in 10 customers see the responsibility of fitting water saving devices like the syphon lying with the housing developers.

Responsible party



Base: All respondents (1698). Q21 Please indicate whose responsibility you think it is to fit products such as the syphon to help prevent leaking toilets.

Customer views of fitting responsibility

Generally, customers believe that it is the responsibility of housing developers to fit products such as the syphon.

Responsibility of fitting the syphon

Opinions are split - while some argue that developers should bear the burden, others believe it should be manufacturers' responsibility to incorporate leak-preventing devices and adopt environmentally friendly practices. Suggestions are made for inclusion in building regulations to ensure compliance and accountability, with emphasis on the role of housing developers and associations.

Some customers also advocate for targeting this product at plumbers as their recommendations are respected by customers as it is deemed that they would be more knowledgeable.

Group differences

Leak Fixers and Ignorers both advocate for building control to enforce regulations that ensure developers install toilets less prone to leaks, with Ignorers highlighting the strict compliance developers already face. Hypothetical Customers present a split perspective, with some attributing responsibility to developers and others emphasising the role of manufacturers in incorporating leak-preventing devices and adopting eco-friendly practices.

“Building control should have systems in place to make sure that there is no leakage. If there are issues, then these should be fitted as standard. If they made it part of building regulations, they’d have to put them in.”

Leak Fixer

“If I had a leak and the plumber recommended it, I’d take his word for it, but otherwise I wouldn’t be interested.”

Unmetered Leak customer

“It’s the [toilet] manufacturers that choose which company’s syphons they use so it depends what mechanism they install.”

Hypothetical Leak Customer

“The housing association should be involved. It all comes down to the pipework and the toilets that they install. It could be saving them money in the long term.”

Leak Ignorer

Willingness to Pay for the syphon

Gabor Granger methodology

This 'Willingness to Pay' analysis is derived from the *Gabor Granger pricing* exercise included in the survey.

The aim of the exercise is to establish what proportion of any given population will be willing to pay for the syphon across a range of price-points.

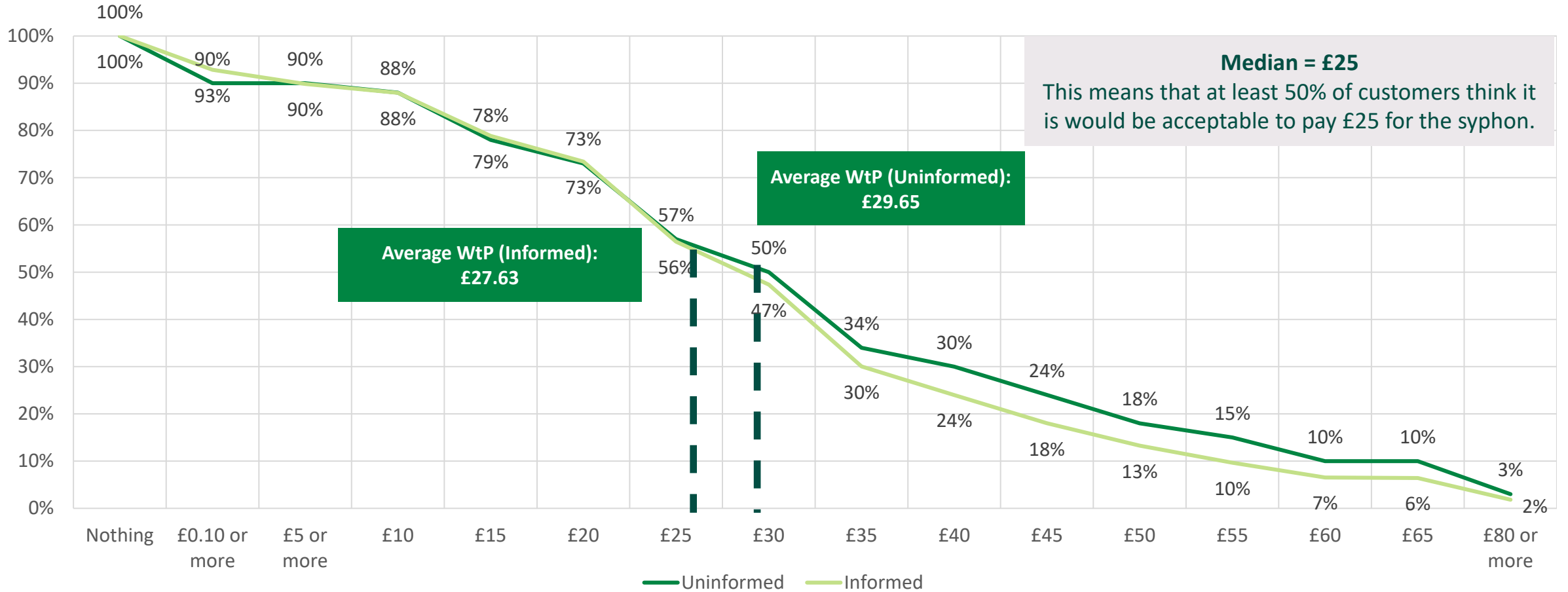
The *Gabor Granger* approach presented each respondent with a random starting point, ranging from £30 to £70. The respondent was then simply asked whether they would be willing to pay this amount to purchase the syphon.

If the respondent said that the initial price *is* acceptable, they were asked again, but this time at a higher value (taken from the list displayed right). If they rejected the initial price, we asked about a lower value. This was repeated a maximum of 3 times, with those respondents who did not reach a maximum acceptable price point during the exercise invited to say how much they would find acceptable (allowing a £0 response for respondents who do not think it is acceptable to contribute at all).

Price points used	
Price Point	Amount
p1	£20
p2	£25
p3	£30
p4	£35
p5	£40
p6	£45
p7	£50
p8	£55
p9	£60
p10	£65
p11	£70
p12	£75
p13	£80

Acceptability of paying extra towards enhanced screening

The average price that customers would be willing to pay for the syphon, once being supplied with information about the price of current solutions, is £27.63, with an upper limit of £28.53 and a lower limit of £26.73.



Base: All respondents giving valid WtP (1564) Q22 (UNINFORMED). How likely or unlikely would you be to buy the syphon product for [PRICE]? Q24 (INFORMED) The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?

Uninformed v Informed Willingness to Pay

Though the Median Willingness to Pay value remains constant (£25), the average value deemed acceptable to pay for the syphon decreases by £2.02 after customers are made aware of the price of parts currently available on the market (£27.63 down from £29.65).

	Zero willingness to pay	Average WtP (95% confidence interval)	Median WtP	% willing to pay £40 or more
Uninformed	10%	£29.65 (£28.64 - £30.67)	£25	30%
Informed	7%	£27.63 (£26.73 - £28.53)	£25	24%

Sub-group analysis

There are no significant differences in Average Willingness to Pay across sub-groups.

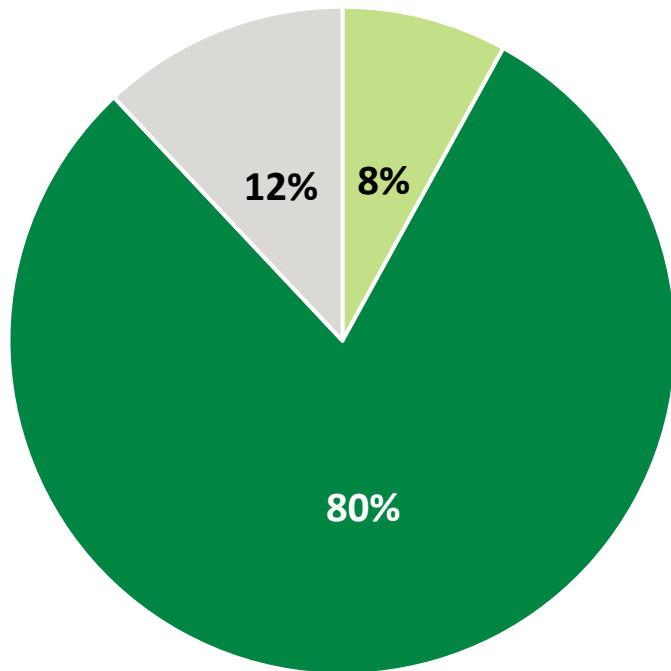
However, those in the Hypothetical customer group and those aged 70+ are significantly more likely to give a value of £0.

Base: All respondents giving valid WtP (1564) **Q22 (UNINFORMED)**. How likely or unlikely would you be to buy the syphon product for [PRICE]? **Q24 (INFORMED)** The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?

Uninformed v Informed Willingness to Pay

8 in 10 customers did not change the maximum price they initially stated after being made aware of the price of parts currently available on the market. However, any change identified is influenced by the steepness of the initial value given.

Changes in WtP once informed of price of current syphons



■ Gave higher price ■ Remained the same ■ Gave lower price

Changes in WtP once informed	Initial WtP <£50	Initial WtP £50 or more
Gave lower price	6.9%	34.9%
Remained the same	83.3%	64.1%
Gave higher price	9.8%	1.0%

People who give an initial Willingness to Pay of £50 or more are likely to revise their answer and tend to drop their maximum price once informed of the price of current products on the market.

Conversely, those who give a lower initial Willingness to pay (<£50) are more likely to not change their answers. However, around 1 in 10 increase this value once informed.

Base: All respondents giving valid WtP (1564) Q22 (UNINFORMED). How likely or unlikely would you be to buy the syphon product for [PRICE]? Q24 (INFORMED) The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?

Informed Willingness to Pay - sub-group analysis

There are no significant differences in Average Willingness to Pay across gender, age, region, meter status or customer group. However, the Average Willingness to Pay for the lowest income group is significantly lower than all other income bands.

	Female	Male	18-29	30-49	50-69	70+	Leak fixers	Leak ignorers	Hypothetical	Unmetered	Metered
Average WtP	£27.92	£27.65	£31.50	£28.86	£28.11	£26.89	£29.16	£29.03	£27.07	£26.38	£28.52
Median WtP	£25.00	£25.00	£25.00	£30.00	£25.00	£25.00	£30.00	£30.00	£25.00	£25.00	£30.00
% giving £0 WtP	8%	7%	8%	4%	6%	9%	5%	0%	8%	8%	7%

	Cheshire	Lancashire	Greater Manchester	Merseyside	Cumbria	Under £21k	£21k-£39,999	£40k - £79,999	£80,000 and over
Average WtP	£29.65	£30.17	£29.89	£28.87	£26.97	£26.63	£30.70	£30.97	£35.77
Median WtP	£25.00	£25.00	£30.00	£25.00	£25.00	£25.00	£30.00	£30.00	£30.00
% giving £0 WtP	8%	5%	8%	6%	7%	6%	4%	3%	5%

Base: All respondents giving valid WtP (1564) Q22 (UNINFORMED). How likely or unlikely would you be to buy the syphon product for [PRICE]? Q24 (INFORMED) The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?

Significantly higher than comparator **Significantly lower than comparator**

Likelihood of ordering the syphon if it was offered free of charge

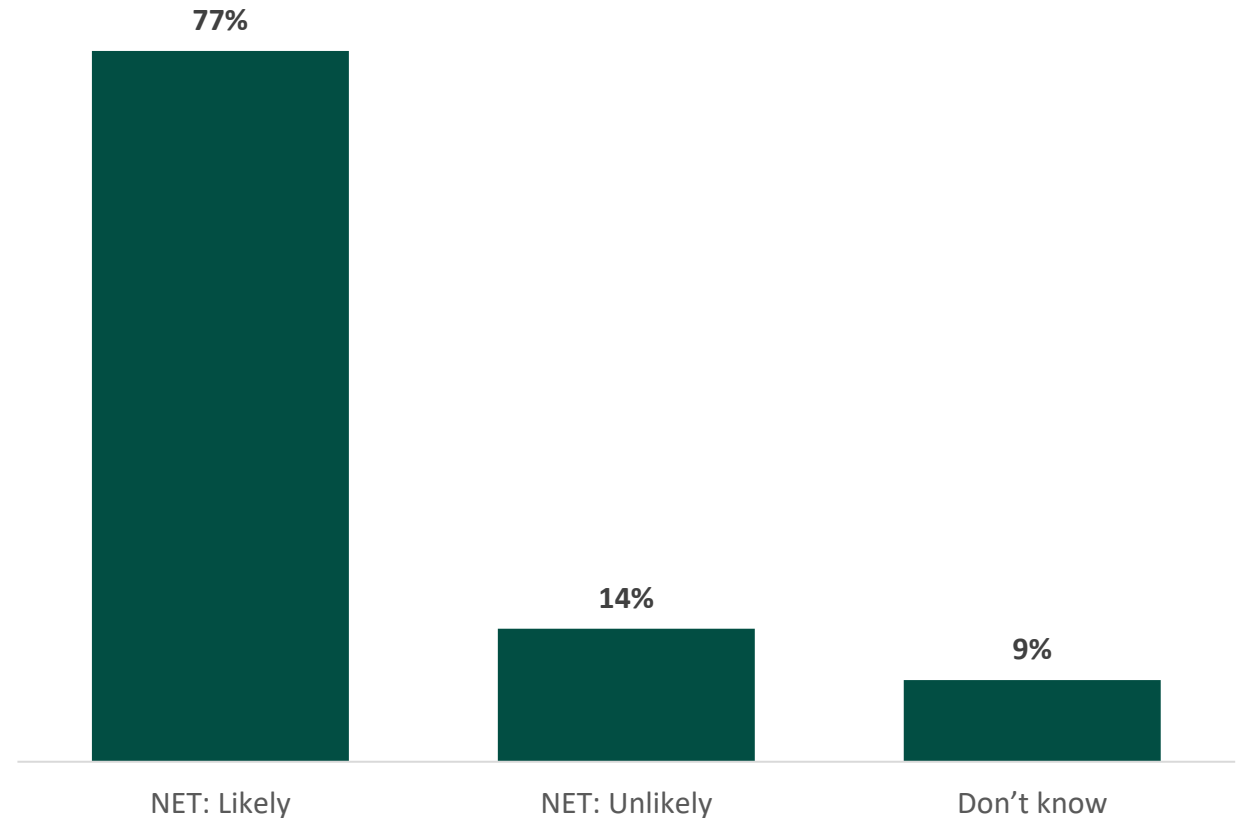
Over three-quarters of customers state that they would likely order the syphon if it was provided for no cost.

Sub-group analysis

Males would be significantly more likely than females to order the syphon if it was free (79% cf 74%), along with those in socio-economic groups ABC1 (84% cf 73% for C2DE), and those on a meter (81%) compared to those unmetered customers (71%).

Unsurprisingly, likelihood of ordering the syphon if it was offered free of charge is positively correlated to feelings of confidence installing the syphon. Those who are confident are 24 percent more likely (88% confident cf 64% not confident) to order one if free.

Moreover, Leak Fixers are significantly more likely to order a product if free of charge (81%) than Hypothetical Leak Customers (75%). There is no significant difference observed for Leak Ignorers.



Base: All respondents (1696) Q26 How likely or unlikely would you be to order the syphon product if it was offered free of charge?

Willingness to pay

The average maximum price customers are willing to pay after being informed of the cost of parts currently available on the market is £40.53.

Respondents generally find it difficult to price the syphon before being provided with information about the price of other products that are currently available on the market.

The long-term savings made by installing the device are seen to make it cost effective, whatever the price point, but customers are quick to mention that there would be an added cost of installation as most would employ a plumber to do so on their behalf.

There are numerous mentions of UU / Fluidmaster / Save Water Save Money representatives fitting the product, with many being willing to pay slightly more for the provision of this service.

Unmetered Customers, in particular, express a willingness to pay more if the manufacturer provided a 20-year guarantee on the product, and would pay more still if a fitting service was offered.

*This may have impacted reported figures for the willingness to pay exercise as some gave a price contingent on someone installing it for them and having a 20-year warranty.

The majority of customers state that they would definitely order a syphon if it were offered for free.

Group	Average Max Price (uninformed)	Average Max Price (informed)
Leak Fixers	33.75	36.88
Leak Ignorers	30.00	22.50
Hypotheticals	38.89	34.00
Unmetered	50.55*	58.33*
Total	39.83	40.53

Customers from our focus groups are willing to pay up to £40.53 on average for the syphon, with Leak Ignorers stating the lowest price and Unmetered Leak Customers giving the highest values.

“The longevity is really the selling point. I’d be willing to pay £80 if it’s got a 20-year lifetime guarantee.”
Unmetered Leak Customer

Willingness to pay

"If a plumber was going to cost me £200, I'd happily pay £70 to fit it myself."

Unmetered Leak Customer

"I put £50. It costs at least £30 just to get a plumber to come out so if this was only another £20, it'd be money well spent if my husband would fit it."

Hypothetical Leak Customer

"I put £35 based on having replaced something like that in the past. That's the top end I'd be willing to pay."

Hypothetical Leak Customer

"I know how much a plumber costs and I'd have to get a plumber so I'm considering how much that would add up to."

Leak Fixers

"I put £65 because it's a new invention and they seem to cost a bit more."

Hypothetical Leak Customer

"I changed mine to £30 based on what others have said about the current prices of syphons."

Hypothetical Leak Customer

"I'm just guessing. I think that's what the usual price bracket is on something like that."

Leak Ignorer

"I know I can get replacement part in a supplier for £25."

Leak Ignorer

Willingness to pay - conditions

As previously mentioned, many customers' values for the willingness to pay exercise are contingent on one or both of the following:

- **Fitting being provided by United Utilities/Fluidmaster/Save Money Save Water**
 - Higher prices were given if this was offered free of charge as standard. However, a few customers mention having a base price point for the product alone, or a higher price point with fitting included.
- **A formalised 20-year warranty or money back guarantee.**

Focus group participants were not asked directly to give a separate value for product plus installation, and so it is not possible to quantify the average price willing to pay in this case. However, customers cite price points of up to £80 on the basis that the product comes with a formalised 20-year guarantee.

As the focus groups encompassed open discussion around the reasoning behind price points suggested, as well as a more interactive conversation around the benefits of the product itself, participants had more opportunity to share these conditions of purchase with us. This is likely the reason for the discrepancy in Willingness to Pay between the qualitative and quantitative methodologies.

As such, it is advised that the Average Willingness to Pay given by quantitative respondents should be focused on, unless the involved parties are willing to put these suggestions in place.

Even though their water consumption does not influence their bill cost, Unmetered customers gave the highest Average Willingness to Pay for the syphon, and were the most vocal about the perceived benefit of a warranty/formal guarantee. Leak Fixers were most vocal about installation being included in the price.

“I’ve upped mine from £20 to £50 with a guarantee that it would last 20 years.”
Unmetered Leak Customer

“I think there should be an option – either you pay £20 or £30, or you pay extra for someone to come and fit it for you.”
Leak Fixers

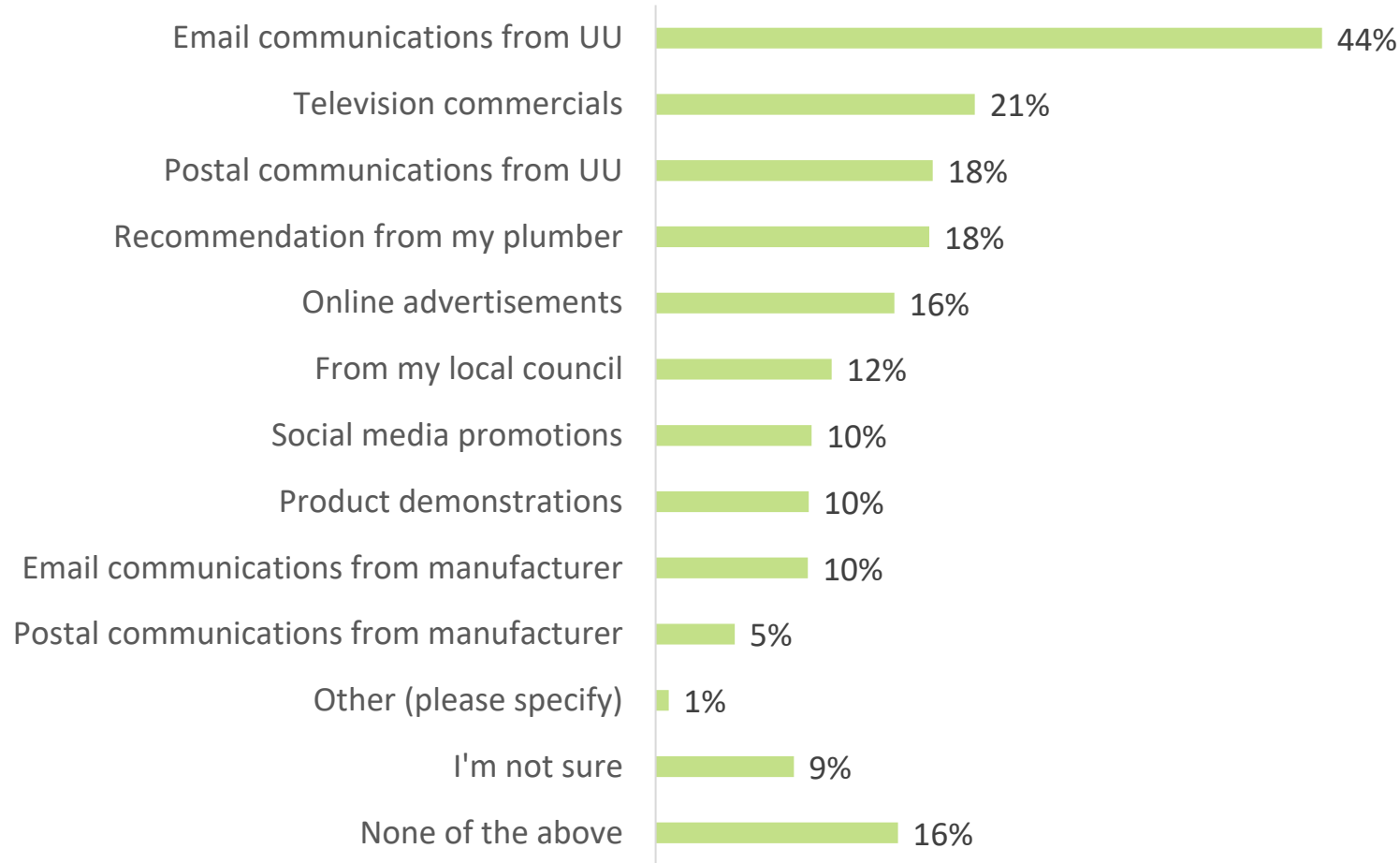
“If they gave me even a 10-year guarantee, it would sit better with me as it would show that they back their product”
Leak Fixers

“The longevity is really the selling point. I’d be willing to pay £80 if it’s got a 20-year lifetime guarantee.”
Unmetered Leak Customer

Route to market

Preferred sources of information for the syphon

The most popular source for information regarding the syphon is within email communications from United Utilities. Customers are more likely to mention wanting comms from UU rather than from the manufacturer. Furthermore, 21% would like to see it in TV adverts.



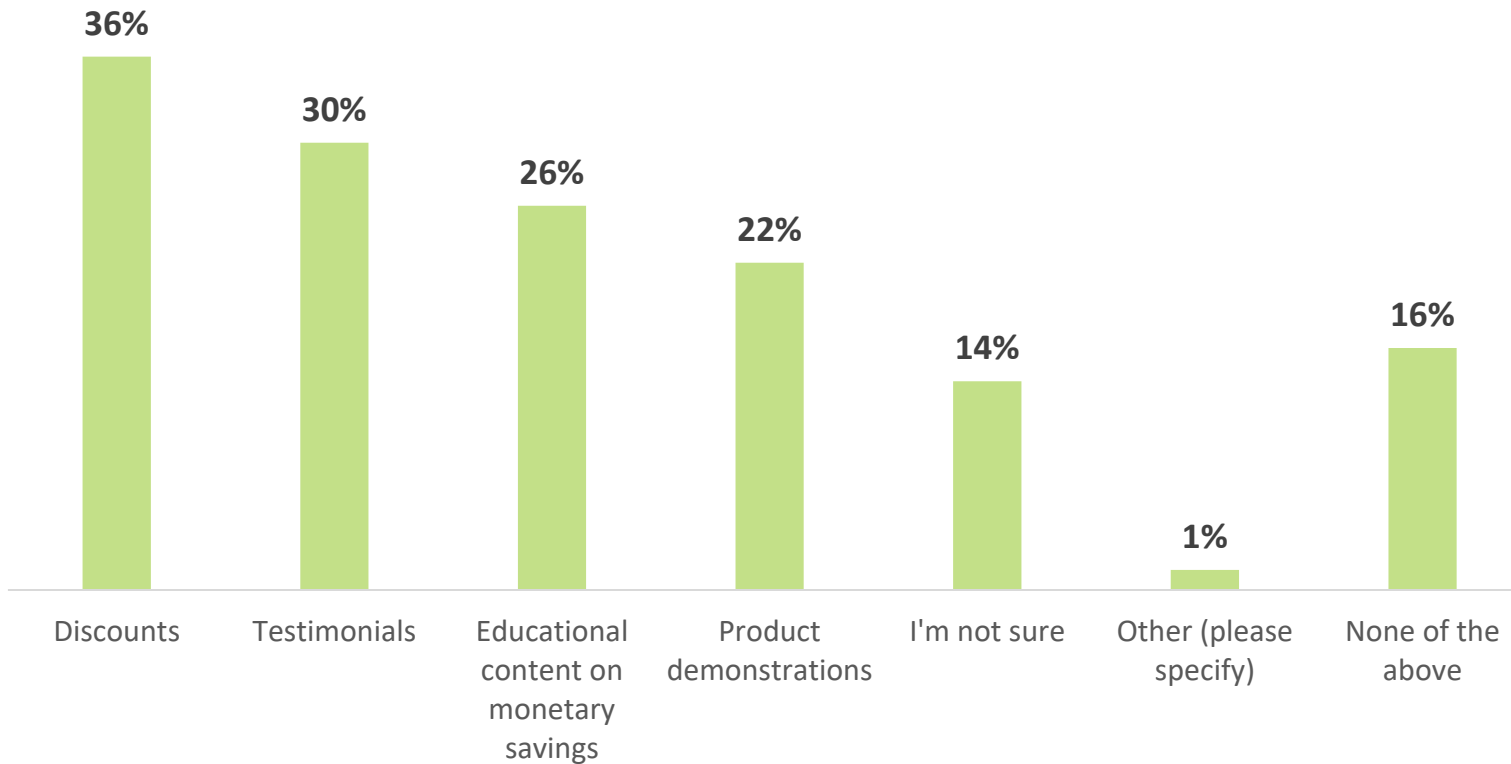
Sub-group analysis

Customers in Greater Manchester are significantly more likely to want to see information for the syphon in Television commercials (25%) compared to customers in Cumbria (15%) and Lancashire (19%).

Metered customers are significantly more likely to want to see information for the syphon in emails from United Utilities (47%) than unmetered customers (39%).

Preferred promotional content

Over one-third of customers state that discounts on the price of the syphon would encourage them to order the product. Following this is testimonials, showing the power of word-of-mouth when it comes to product uptake. Possible savings is also seen as a key selling factor, with over one-quarter of customers stating that they would want this explained to them.



Sub-group analysis

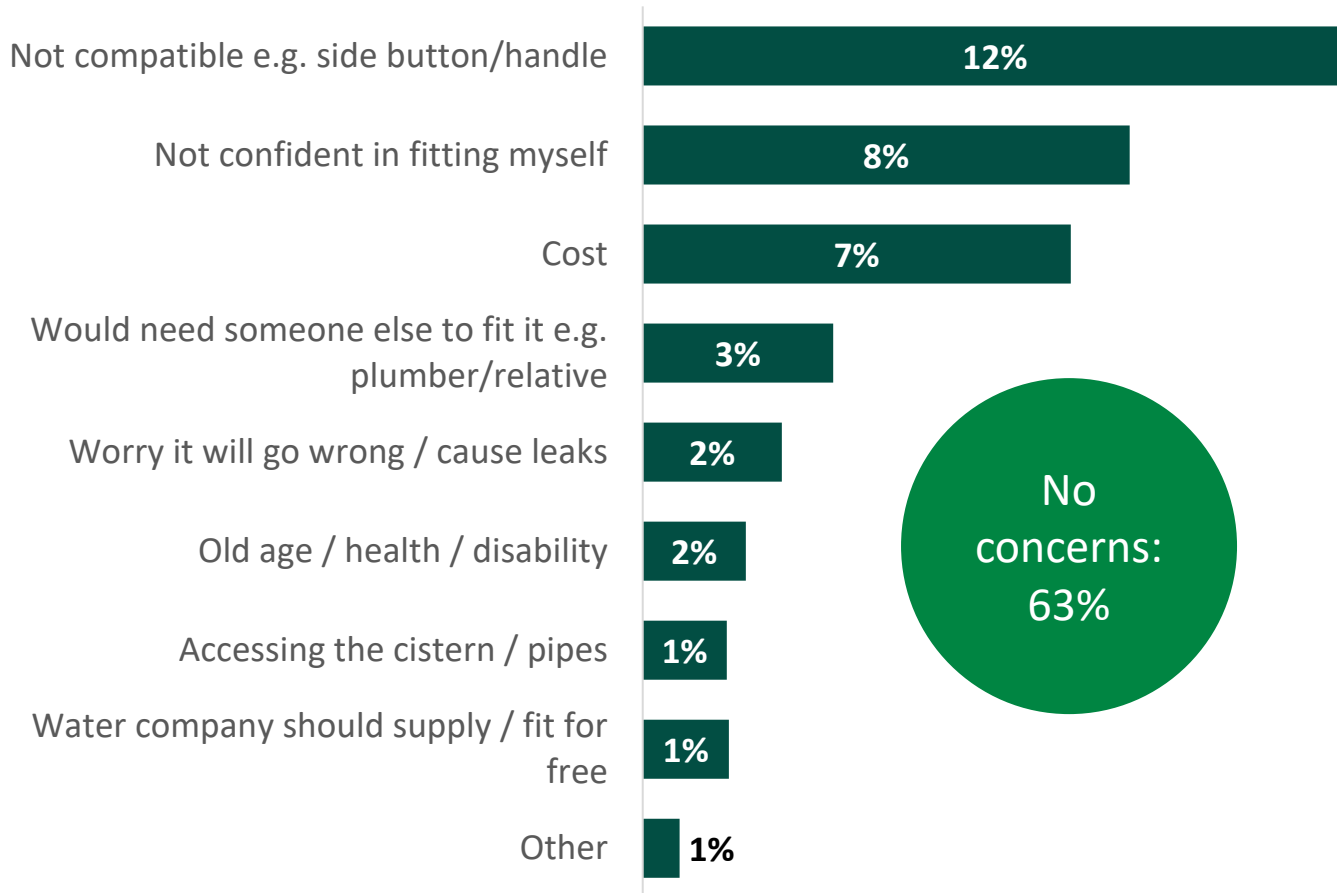
Discounts are more significantly persuasive to customers aged 30-49 (49%) compared to 50-69 year-olds (40%) and those aged 70+ (30%).

Product demonstrations are favoured by those in Urban locations (24%) significantly more-so than customers living on the coast (16%).

Interestingly, those in SEG groups ABC1 are significantly more likely to be persuaded by discounts (43%) and educational content relating to monetary savings associated with installing the syphon compared with those in groups C2DE (33% and 21% respectively).

Barriers to purchase

Whilst the majority of customers (63%) report having no concerns about the syphon, the biggest barrier for uptake is incompatibility (12%). Confidence in installation plays a part in customer hesitation, with 8% of customers noting this as a concern.



“Things are financially difficult, so any additional spend would be difficult for our household.”
Leak Fixer

“It will take more than the suggested 5 minutes to fit for those of us who are not plumbers.”
Leak Fixer

“I hate messing with water fittings as it often introduces leaks. My cistern is concealed behind a wall in my house so would be difficult to adapt. I am not even sure the product is suitable for such systems.”
Hypothetical Leak Customer

Base: All respondents (1698) Q29 Are there any specific concerns or barriers that would prevent you from using the syphon?

Route to market

Overall, customers would look for information to be spread by United Utilities in bills and emails. Elsewhere, social media, TV and home improvement stores are seen as appropriate sources

Spreading awareness

Customers mention a number of different outlets by which they would like to see information about the syphon.

Firstly, customers turn to **United Utilities** to raise awareness, whether that be via marketing campaigns, including marketing materials or leaflets in **customer bills**, or featuring the product on a **water-saving email**.

Customers also say that they'd turn to other **online sources**. Recommendations and reviews are highly valued, with customer saying that they'd look at reviews on **retailers' websites** such as Screwfix or B&Q, as well as testimonials on **customer association websites** like Which?

Across all channels, the importance of calling out the **specific selling points** of the product is emphasized – it is difficult for customers to understand the real benefits of the syphon over other products that are available based off first impressions of looking at both side-by-side. Moreover, the only way customers currently see themselves becoming aware of the syphon would be if they had the specific issue outlined and actively searched for information.

Customers also advocate for **UU endorsement**, stating that this would be more likely to draw their attention. Though unlikely to refer to UU when dealing with a small leak (turning to other sources instead), customers have a high level of trust for UU and are confident in their expertise relating to saving water and recommendations of products such as this.

How customers typically discover new home improvement products

- TV adverts
- Internet – The UU Website, Online retailers like Amazon, and home improvement websites or social accounts
- Social media platforms like Facebook and TikTok, including influencer promotion
- Trade suppliers
- Homeware stores like B&Q (for advice);
- YouTube (for installation videos).

“If there was an advert on the TV and the opening line was, ‘are you on a meter, do you want to save money?’, I’d be tuned into that - I would want to buy one.”

Hypothetical Leak Customer

Route to market

Customers across the board emphasise the importance of highlighting the syphon's USP at point of sale. Additionally, scepticism exists around the "easy fit" claims, so managing expectations in marketing is recommended.

Educational content

According to our focus groups, the main element customers would like education on is the difference between this product and others available. They would like to know:

- How much water could be saved
- How long it will prevent leaks
- How long it will take to install
- How simple installation is

They also mention seeing value in a free trial period where customers were able to review the product and provide feedback.

The 20-year guarantee is viewed as a key differentiator for the syphon – it is recommended that this forms the basis of marketing.

"I'd want to know what the statistics are of them leaking before and what the difference is with this product."

Unmetered Leak Customer

Instructions

All customer groups show a preference for video instructions over written instructions – they see more value in seeing people fitting the product in real time to reduce process complexity.

Members of the Leak Ignorers group mention the possibility of releasing an app that could be downloaded after purchase, which gives a step-by-step instructional demonstration of how to fit the product.

Some recommend promoting the device from a water saving / money saving perspective rather than trying to promote its DIY credentials, which are not believed to be realistic.

Customers worry that they'd be left feeling disgruntled if the "Quick and Easy" claims are not proven true. Consequently, they stress the importance of managing expectations.

Route to market

"[I'd like to see] maybe a rough estimate of how long it'd take to install."

Unmetered Leak Customer

"At B&Q I would have a sign saying "Have you had trouble with a leaky loo?" then showing you this new thing and how long it lasts and that you get warranty with it. Then people might think to change it."

Leak Ignorer

"I think [United Utilities] could offer a certain number of customers a free trial with it to start off that review process, with the guarantee that if you did fit it yourself and something went wrong, they'll help you with it."

Hypothetical Leak Customer

"I think if there was a QR code in the box to bring up a video, that'd be good. Then you can stop and start it as you need."

Unmetered Leak Customer

"If there was a practical video that you can show to people like how it saves water, what you have now and what this does and how it works... people might stop and look at it."

Leak Fixer

"I like to watch somebody do it, you know. I'd rather look at something like that than read instructions and drawings."

Leak Ignorer

"United Utilities need to be backing it because at the end of the day, it's going to be benefitting them too [in terms of saving water]. They should be pushing us to go and get it."

Hypothetical Leak Customer

"I'd offer an app that you can download on your phone. That would probably be the best bet, so you can take it with you into the bathroom."

Leak Ignorer

"It may be that you really need to promote to the plumbing trade. If the plumber knew of the value of this comparatively, and was honest about it, we'd trust them."

Leak Fixer

"I think with everything nowadays, if you teach it to the younger generation, they keep us in check."

Unmetered Leak Customer

Summary of findings

Summary of findings (I)

Attitudes towards saving water

Customers generally tend to prioritise environmental concerns over financial ones, though metered customers show stronger support for water conservation. Many customers state that their children often demonstrate awareness of water-saving practices due to school education, but they see a lack in education amongst adults on this topic.

Fixing leaks

Leak Fixers typically address leaks by contacting plumbers or fixing them independently, driven by concerns about potential damage. Leak Ignorers often lack the knowledge or financial means to address leaks promptly, with action varying based on perceived severity.

Though Hypothetical customers are more likely to suggest they would try to fix the leak themselves, they would also have a plumber on hand to offer support, if needed.

General perceptions of the syphon

While generally positive about the device, customers express concerns about its technical aspects, compatibility, and ease of installation. Leak Fixers show more hesitancy towards the device compared to Hypothetical customers. Some expressed worries about usability of the single push button, particularly for children.

Likelihood of use

While most customers show a high likelihood of using the syphon, concerns about installation complexity lead many to consider professional fitting. Leak Fixers and Unmetered customers focus more on technical aspects while Hypothetical customers and Leak Ignorers worry more about their ability to install the syphon independently.

Additionally, some question its necessity amid current economic hardship.

Confidence installing the syphon

Customer confidence in installing the syphon varies widely, with demographic differences observed. Challenges highlighted include removing old parts and fear of errors, with less than half of customers (45%) feeling confident in DIY installation after viewing the instructional video.

Demographic differences exist, with those aged 30-49 and males more likely to feel confident in installation.

When looking for assistance, 19% would consider consulting a plumber for assistance. Younger age groups are more inclined to seek support through phone, online, or video formats.

Males exhibit much higher levels of confidence in their ability to fit the syphon themselves, at 60% feeling confident, compared to just 23% of females feeling the same.

Summary of findings (II)

Price

There are significant differences in willingness to pay depending on methodology, with those taking part in focus groups giving a higher average value.

For survey respondents whose Willingness to Pay was determined using Gabor Granger analysis, the average informed price they're willing to pay for the syphon is £27.63.

For focus group respondents who were simply asked to give a maximum price willing to pay, the average value is £40.53 (informed).

Context and comparison do influence the values customers state they would be willing to pay – we see a decrease of an average of £2.02 after customers are made aware of the price of parts currently available on the market.

Unsurprisingly, the Average Willingness to Pay for the lowest income group is significantly lower than all other income bands.

Over three-quarters of survey participants state that they would likely order a syphon if it were offered free of charge.

Long-term savings are seen as justifying the cost, though many anticipate added installation expenses.

Many expressed a willingness to pay a higher price if UU / Fluidmaster / Save Water Save Money representatives were able to fit the product, and others would pay more still if the product had a 20-year warranty.

Promotion

Email communications from United Utilities are the top source of information about the syphon, with interest also shown in TV adverts. Discounts and educational content are persuasive, especially among SEG groups ABC1.

Potential endorsement by United Utilities is also seen as a key selling point, along with the 20 year guarantee, which customers would like to see formalised.

Customers would like for instructions to be made available online, with most preferring a video format to allow them to follow along. Some mentioned using an app in the same way.

Recommendations

We would recommend that United Utilities and Save Water Save Money...

The discrepancy between average WtP for online respondents and those attending focus groups may be explained by the fact that focus group participants were able to physically see and feel the syphon, and were given a more extensive introduction to the product, including how it differs to current syphons/fixes.

Therefore, to set a price that is higher than that of current parts (£35+), it may be necessary to **have the product physically available in stores, with clear call-outs relating to differentiating factors.**

Consider readdressing the usability of the single-push button as it is currently seen as somewhat unintuitive.

Manage expectations and adapt language to suggest this would be **easy for a DIY-savvy** audience, rather than for all.

Alter the instructional video to address common challenges highlighted, such as the removal of old parts. Provide step-by-step guidance with clear visuals to enhance understanding.

Consider the viability of a UU fitting service as this would increase the price customers are willing to pay for the syphon.

Include educational content on key points of differentiation, including conservation of water, potentially reducing bills, and preventing issues reoccurring for up to 20 years.

If it is decided that UU will back the syphon, it is important that this is communicated in marketing efforts. **Customers are looking for the endorsement of their water company**, and would rather learn of the product directly from you than from the manufacturer/retailers.

Consider offering promotional discounts or incentives to encourage customers to purchase the syphon despite economic concerns. Highlight the value proposition of the syphon, including its potential to reduce water bills and contribute to environmental sustainability, to justify the investment to cost-conscious consumers.

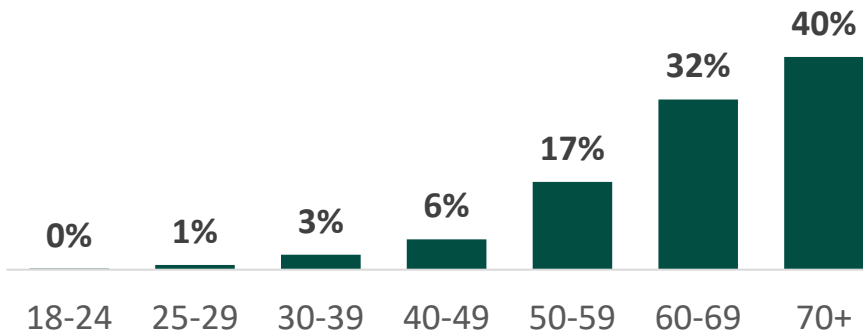
To this point, we recommend that you **consider implementing a money-back guarantee based on the 20 years worth of flushing.** This was seen as a big advantage for many.

Make plumbers a primary target audience. Customers say that they trust the recommendation of a plumber, so if you can promote the syphon to trade retailers and tradespeople directly, they **may be able to advocate for the use of the product on your behalf.**

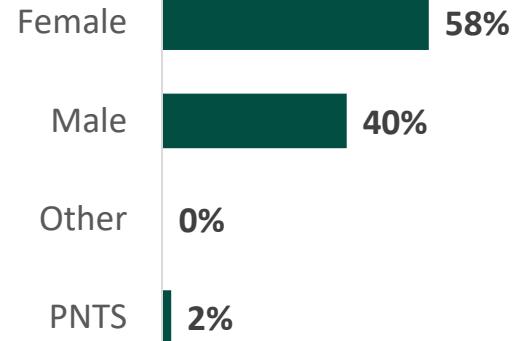
Appendix A: Demographics

Demographic (I)

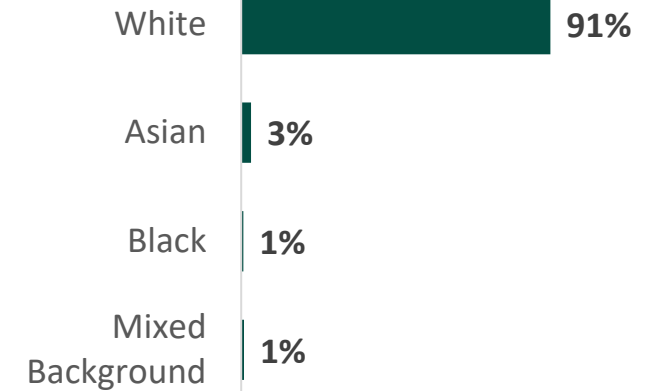
Age



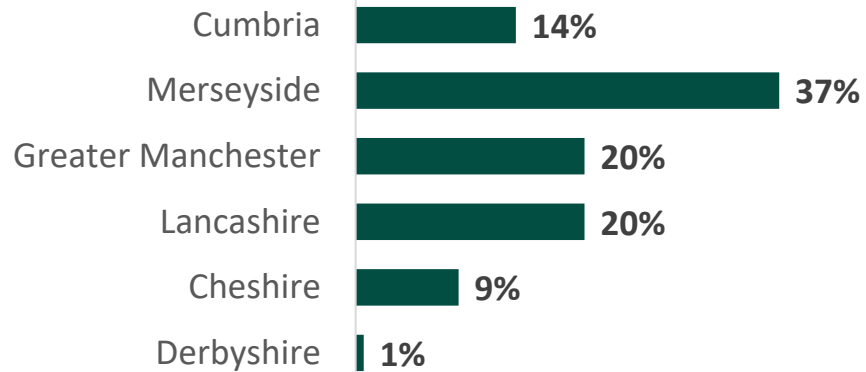
Gender



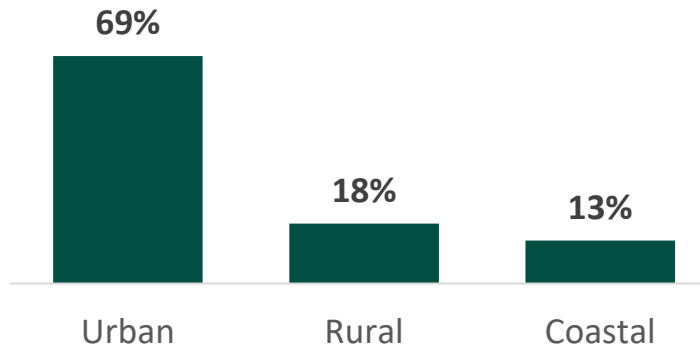
Ethnicity



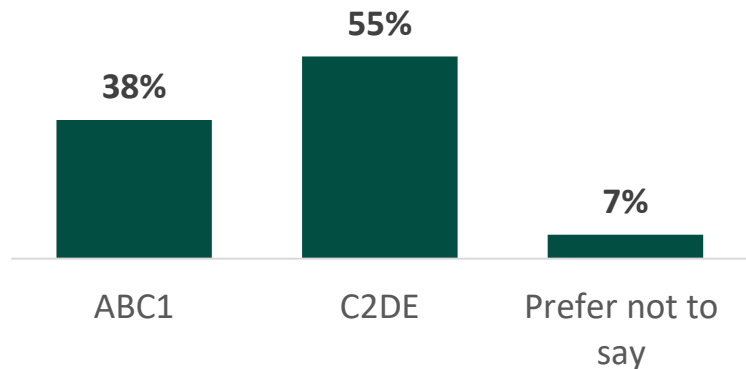
United Utilities Region



Region



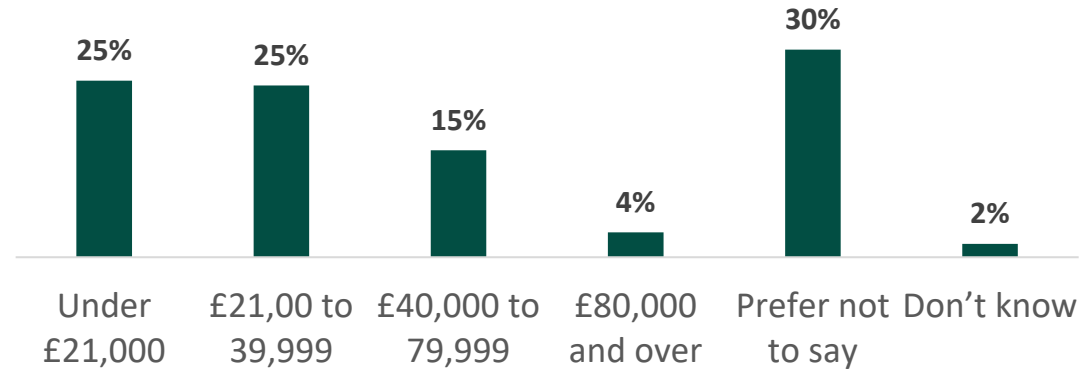
SEG



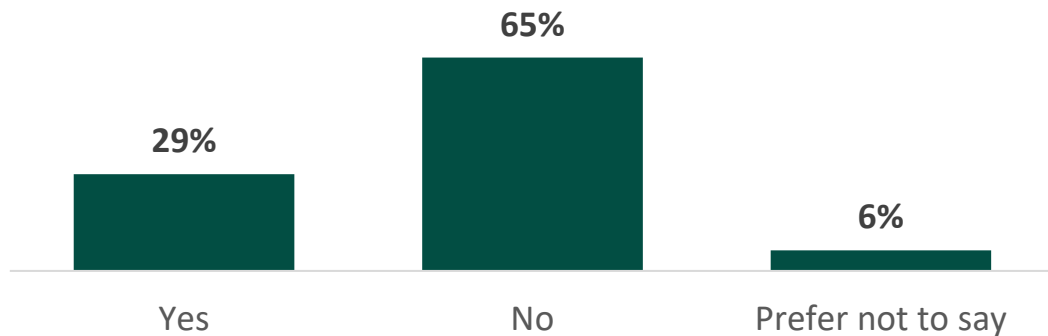
Base: All respondents (1698) **S02.** How would you describe yourself? **S03.** Which of the following age groups do you fall within? **S04.** Where in the North West do you live? **S05.** Would you describe where you live as... **S06.** Which of the following best describes your occupation? **C01.** What is your race or ethnic group?

Demographic (II)

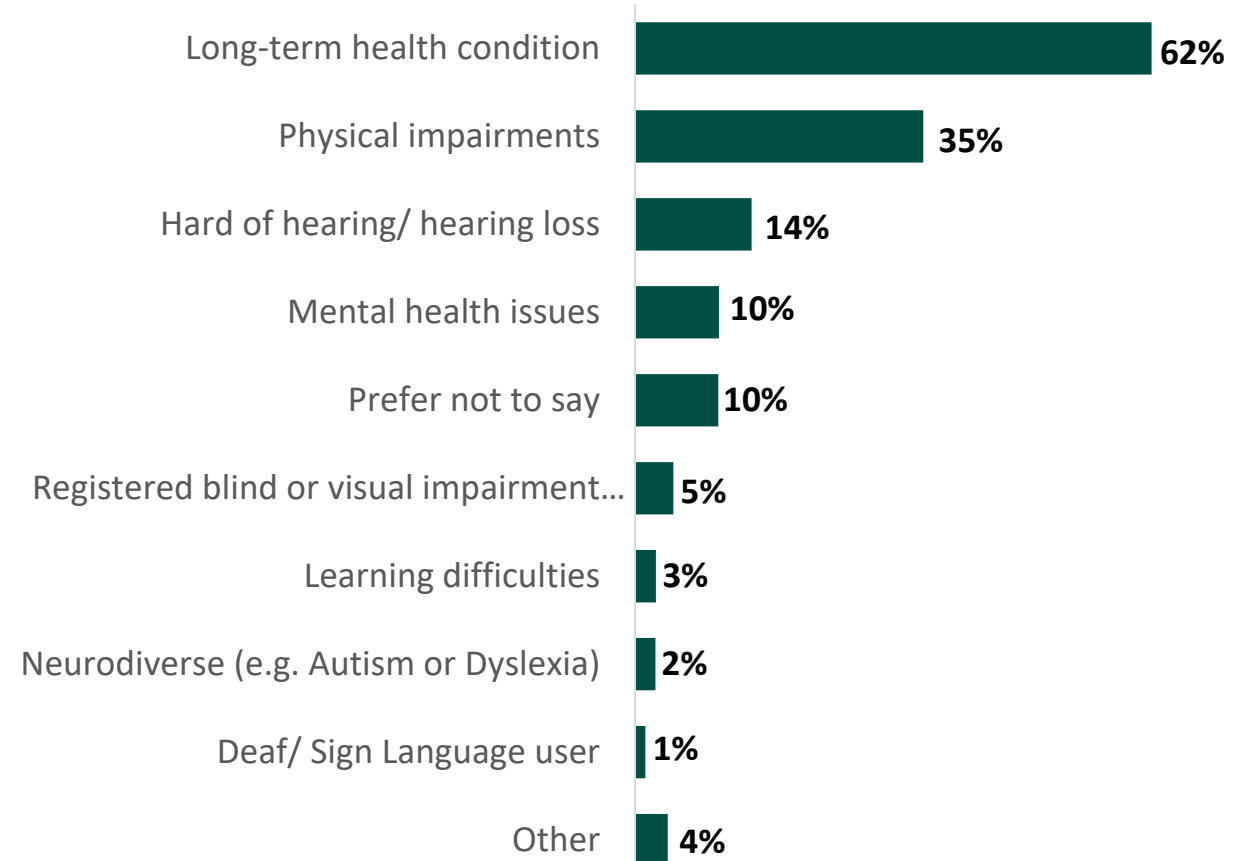
Income



Disability



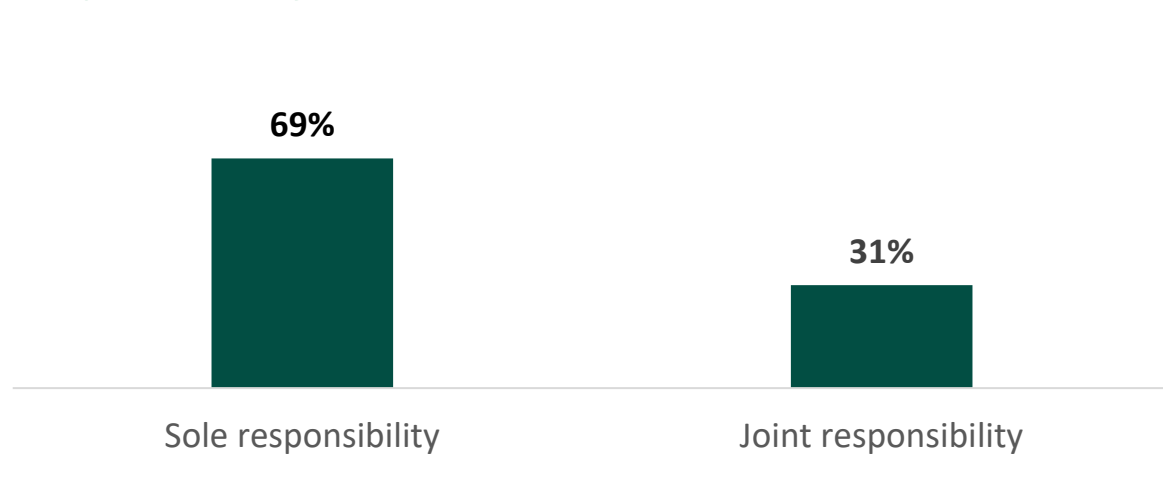
Nature of Disability



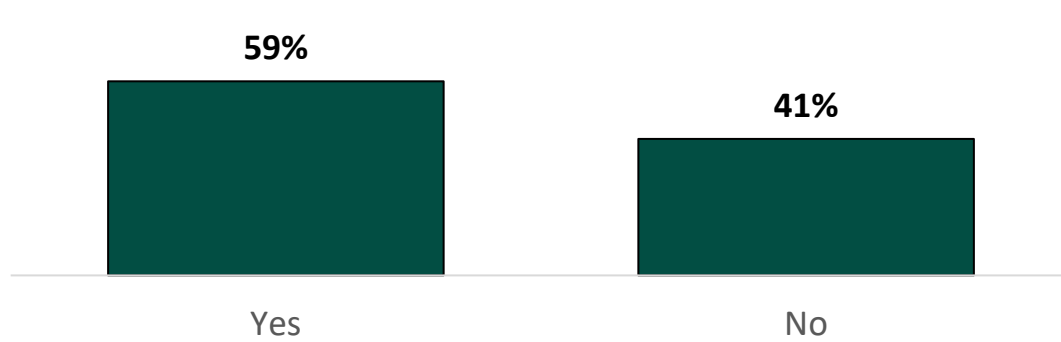
Base: All respondents (1698) C02 Do you consider yourself to have a disability or long-term health condition? C03. Which of these best describes the nature of your disability or long-term health condition? C04. Which of the following income bands does your total household income fall into?

Demographic (III)

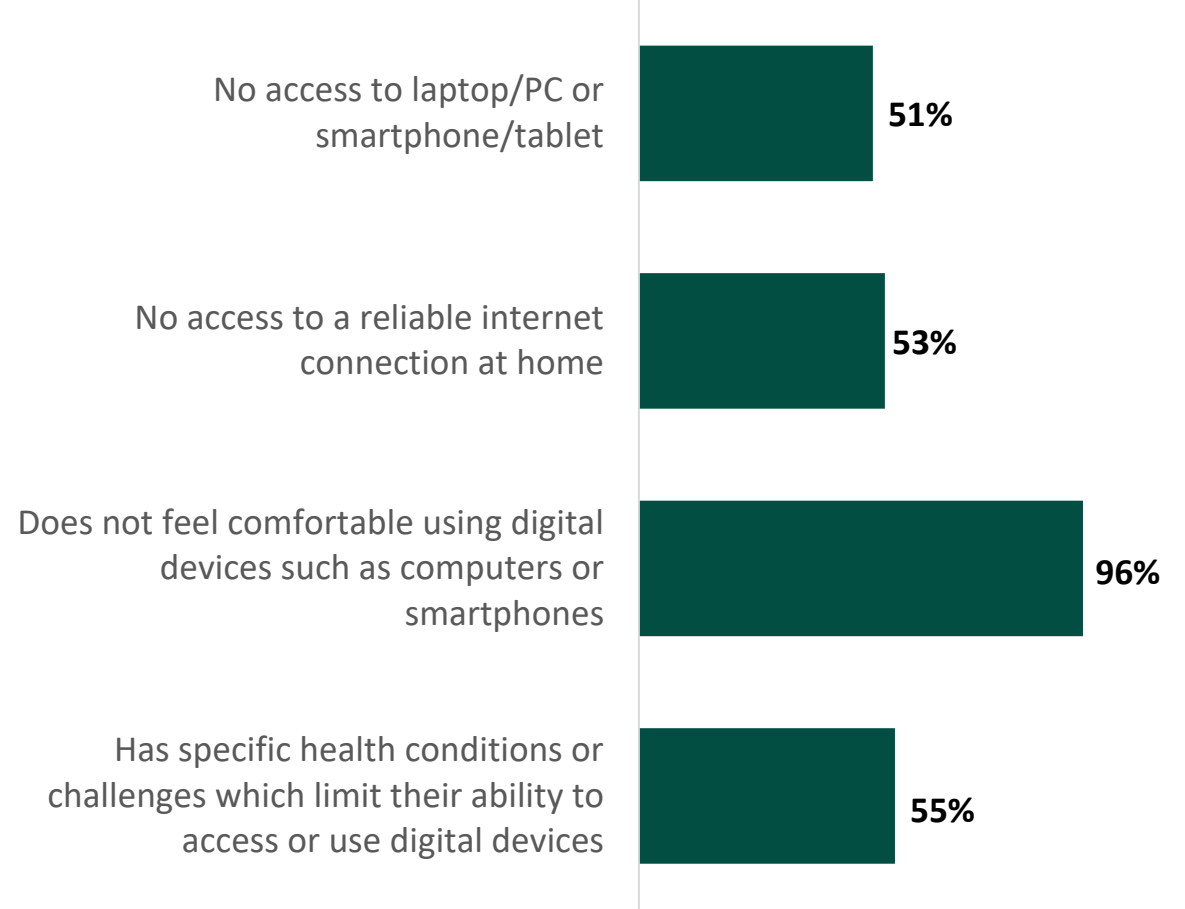
Responsibility for bills



Metered



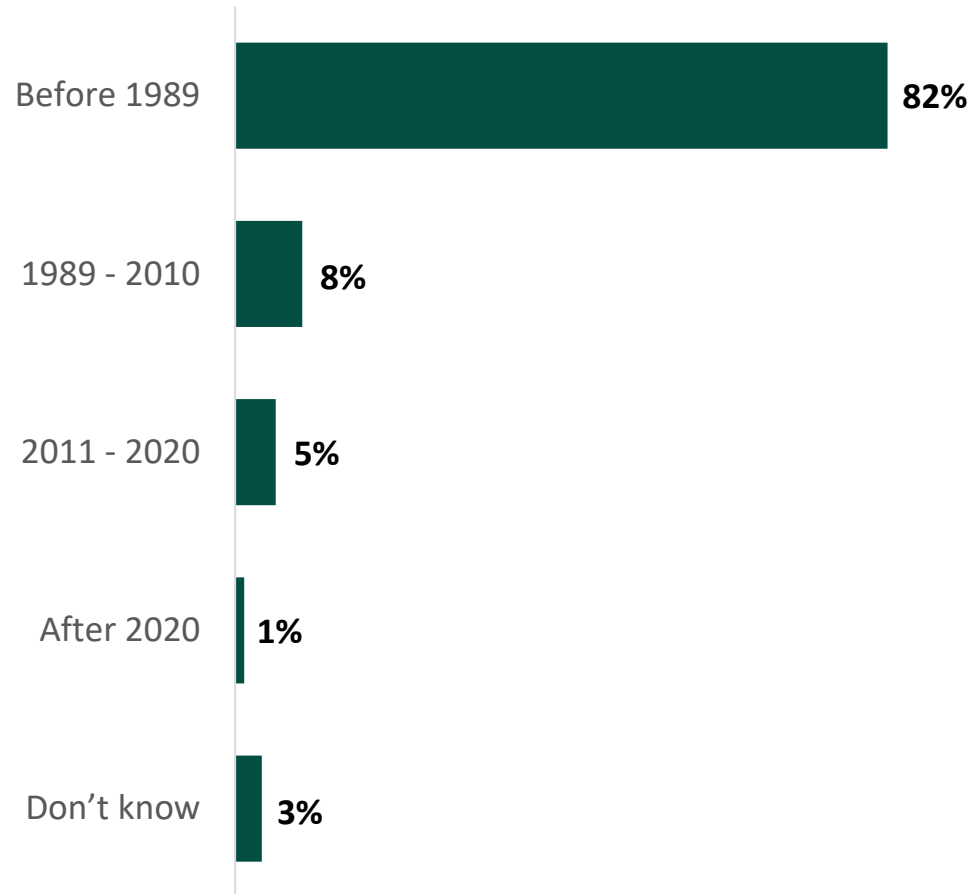
Reasons for digital exclusion (CAPI only)



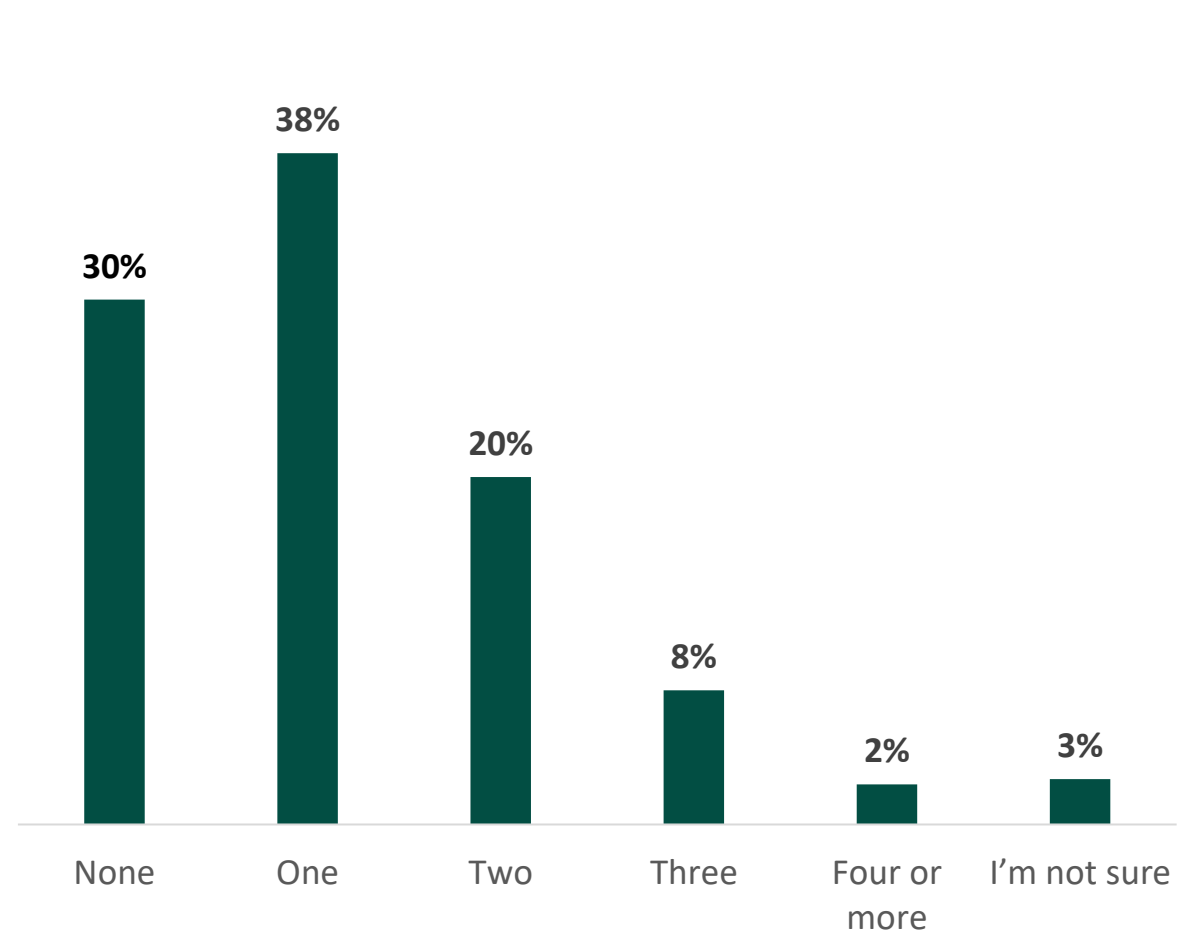
Base: All respondents (1698) **S07**. Do you have any responsibility for the utility bills in your home? Base: All CAPI respondents (61) **S03**. Please indicate whether you feel that the following statements are true or false
Base: All CAPI respondents (61) **GC02**. Do you have a water meter in your home? **Meter status for online respondents was determined by initial grouping.**

Demographic (IV)

Year house built



Number of dual flush toilets in property



Base: All respondents (1698) C07. Approximately when was your property built? C05. How many toilets do you have in your property? Base: All respondents who know how many toilets they have (1694) C06. You mentioned that you have [INSERT CODE AT C05] toilets in your property, how many have a dual flush i.e. two flush buttons

Appendix B: Stimulus

Stimulus (I)

“One of the biggest culprits for wasting water in the home are toilet cisterns, especially the modern push button types. That’s because modern cisterns tend to overflow into the toilet bowl rather than through a pipe in the wall, making leaks difficult to spot.

You are now going to be shown some information about a new ‘syphon’ product that is coming to the market, which will help to fix and prevent future leaks in toilets.

A syphon is a tube fitted in the toilet cistern which, when flushed, assists in drawing water and waste from the bowl, ensuring that everything is efficiently flushed away.

Please read the information sheet below and click ‘next’ once finished.”

Leaky Loo solution: introducing our new syphon

Did you know?

Around **400 million litres of water** is estimated to leak from **UK toilets every day**, which is enough water to supply 2.8 million people



Fixing a leaky loo can **halve a customer's water bill** if they pay by meter



The Leaky loo problem

Between **4%** and **8%** of UK toilets are leaking. With 3 million homes in North West that equates to between 250,000 and 500,000 leaky loos!

A worn flush can create a leaky loo, allowing thousands of litres of clean water to trickle from the cistern and into the bowl. Considering that a single leaky loo can waste up to **400 litres of water per day**, it is easy to understand the importance of fixing leaking toilets.

But there's a solution!

Leaky Loo solution

Introducing the new Easy Fit Ultra Syphon. This innovative product is proven to prevent leaky loos from happening in the first place. It is also:

- **Quick & simple to install yourself at home**
- **Affordable for a variety of customers**
- **Thoroughly tested in labs & in the field**
- **Sustainably made & packaged**

By taking five minutes to install the syphon, you could prevent your loo leaking for 20 years' worth of flushing, saving water and money.



Stimulus (II)

Qual

“Each year, United Utilities runs an innovation programme which gives a handful of applicants the chance to trial their solutions in an operational setting. This year marks the fifth wave of the innovation lab programme. One of this year’s participants is Save Water Save Money. United Utilities would like to gather opinions on a new product created by Save Water Save Money and Fluidmaster (a repair parts manufacturer), that is intended to help tackle toilet leaks. To be clear, United Utilities is not the manufacturer of this product.

One of the biggest culprits for wasting water in the home are toilet cisterns, especially the modern push button types. These types of toilets have a rubber seal within the push button flush valve inside the cistern which moves with every flush, and over time degrades. When it starts to degrade, the cistern starts to leak water down in to the toilet pan. As modern cisterns tend to overflow into the toilet bowl rather than through a pipe in the wall, it makes these leaks more difficult to spot.

We have handed out some information about a new ‘syphon’ product that is coming to the market, which will help to fix and prevent future leaks in toilets. For context, a syphon is a tube fitted in the toilet cistern which, when flushed, assists in drawing water and waste from the bowl, ensuring that everything is efficiently flushed away.

When you open your normal toilet cistern, you will see a fitting like this picture. This is the part which over time can start to leak. This new syphon, can be fitted by taking out old one, and replacing like this... (MODERATOR TO GIVE DEMONSTRATION)... then adding the push button back on top like so. Then you close the lid and your loo will work like normal.”

Leaky Loo solution: introducing a new syphon

Did you know?

Around **400 million litres of water is estimated to leak from UK toilets every day**, which is enough water to supply 2.8 million people



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A worn flush can create a leaky loo, allowing thousands of litres of clean water to trickle from the cistern and into the bowl. Considering that a single leaky loo can waste up to **400 litres of water per day**, it is easy to understand the importance of fixing leaking toilets.

Leaky Loo solution

Introducing the new Easy Fit Ultra Syphon. This product is proven to prevent leaky loos from happening in the first place, by replacing the rubber seal within the push button flush valve inside the cistern. This seal is a moving part with every flush, and over time degrades. When it starts to degrade, the cistern starts to leak water down into the toilet pan. This new product uses a syphon which prevents this issue and leaking happening in the first place.

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 **Fluidmaster.**

Leaky Loo solution: introducing a new syphon

The manufacturer, **Fluidmaster**, claims that it is:

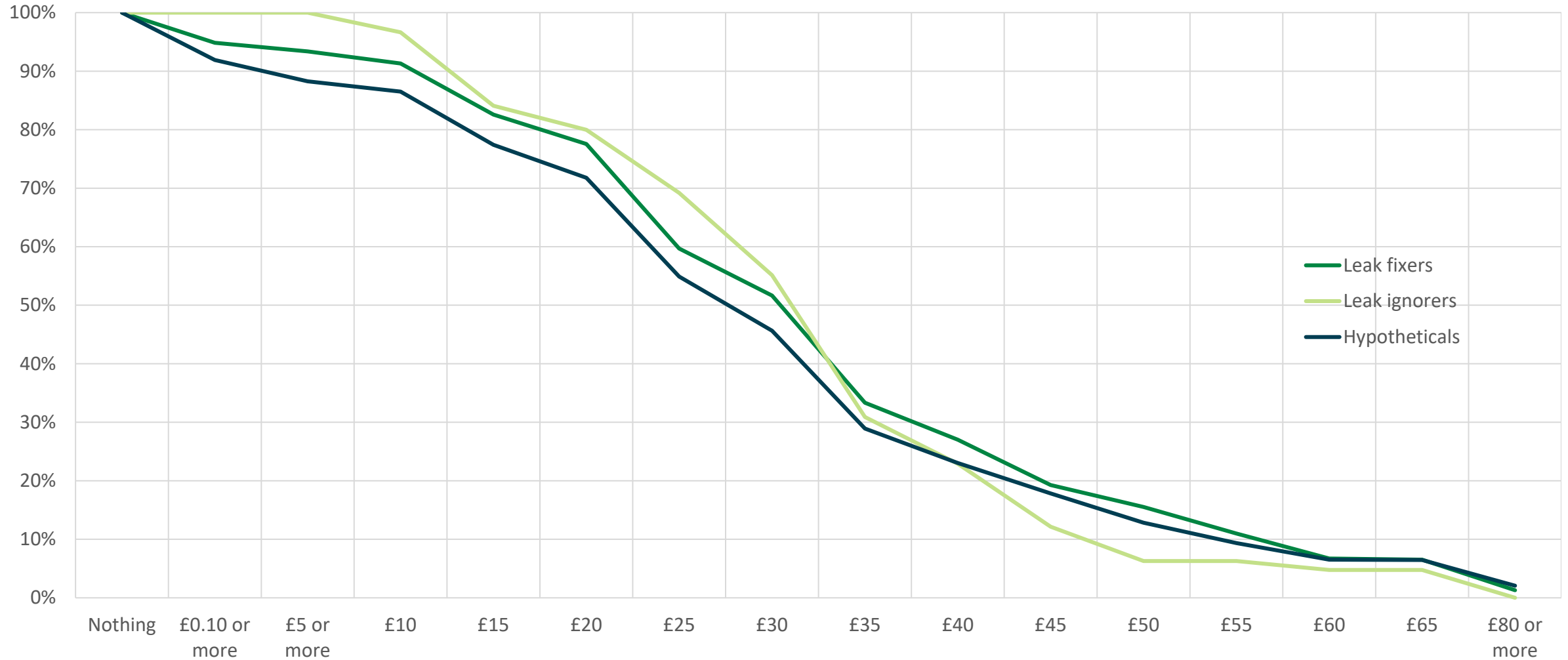
- **Quick & simple to install yourself at home**
- **Affordable for a variety of customers**
- **Thoroughly tested in labs & in the field**
- **Sustainably made & packaged**

By installing the syphon, you could prevent your loo leaking for 20 years' worth of flushing, saving water and money.

 **Fluidmaster.**

Appendix C: Willingness to Pay Subgroup Analysis

Willingness to Pay (Informed): Customer Group



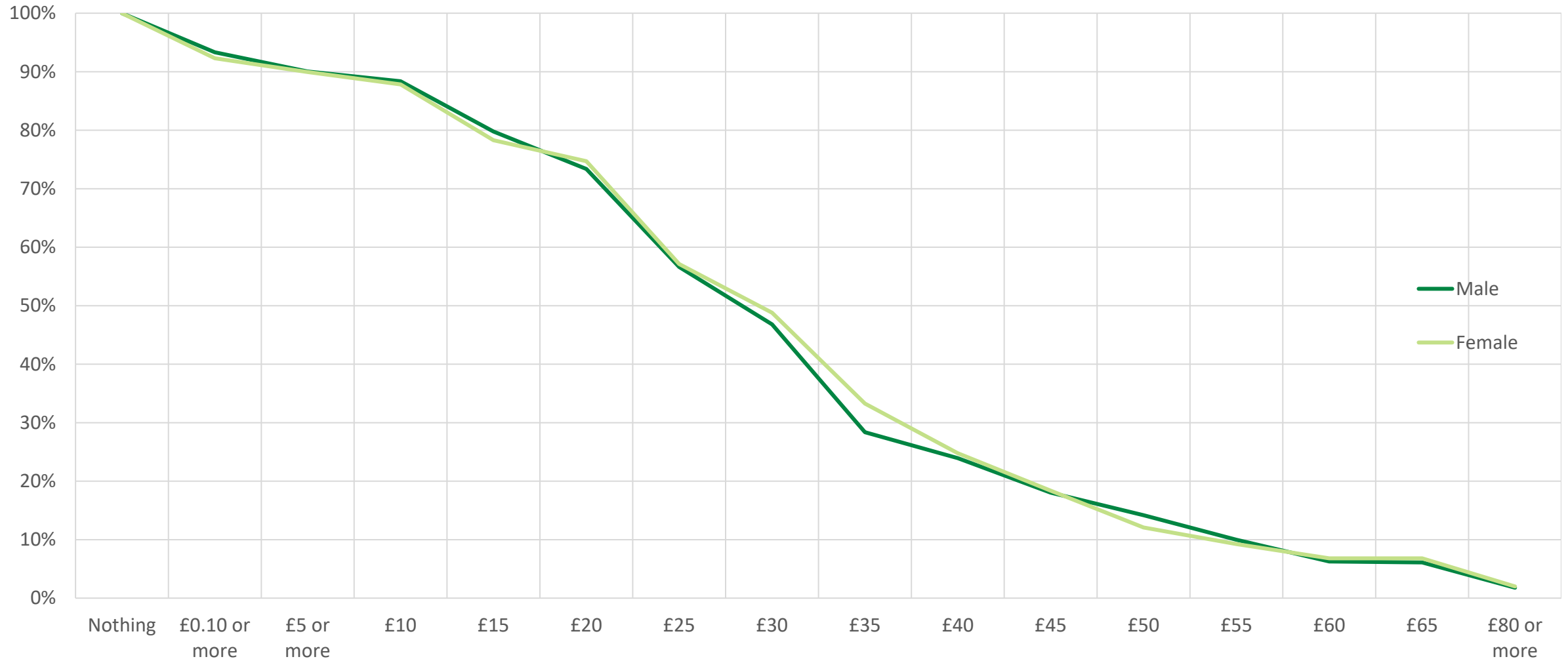
Base: All respondents giving valid WtP (1564) Q22 (UNINFORMED). How likely or unlikely would you be to buy the syphon product for [PRICE]? Q24 (INFORMED) The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?

Willingness to Pay (Informed): Meter status



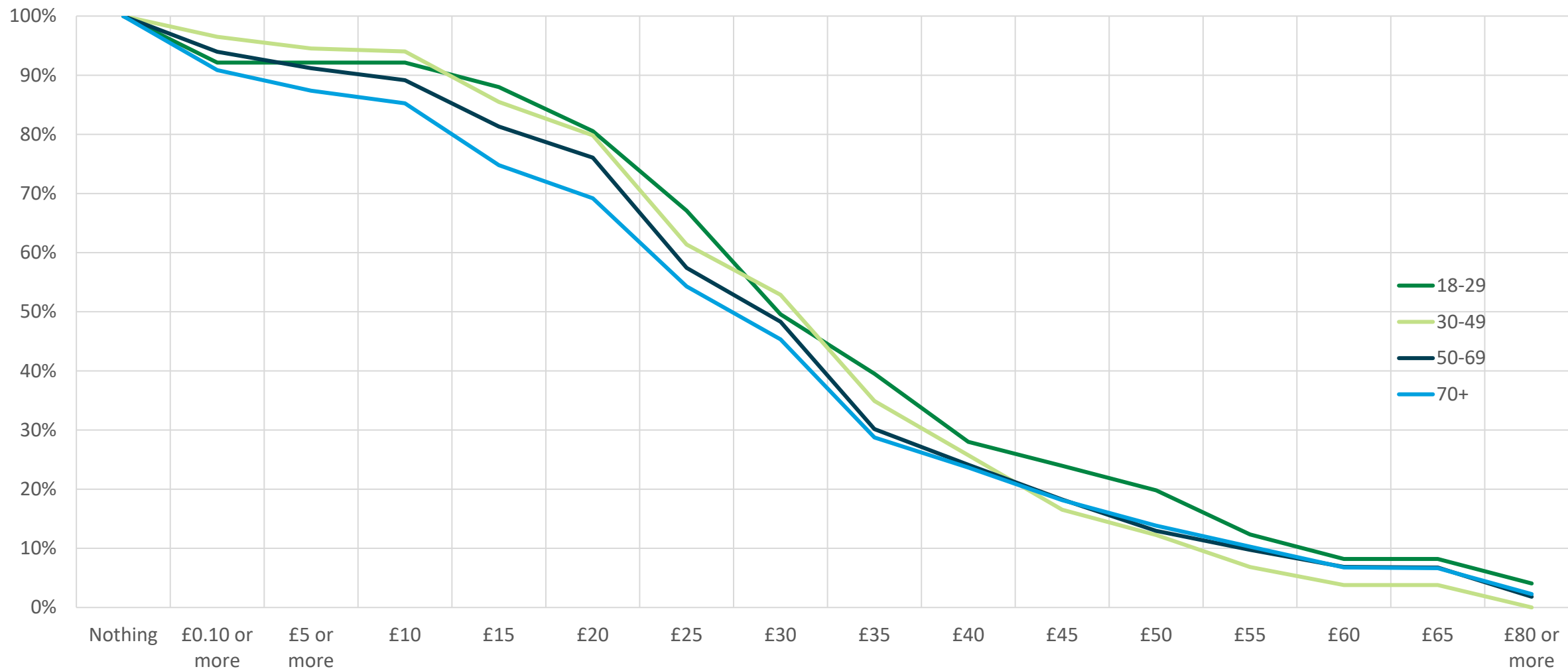
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Willingness to Pay (Informed): Gender



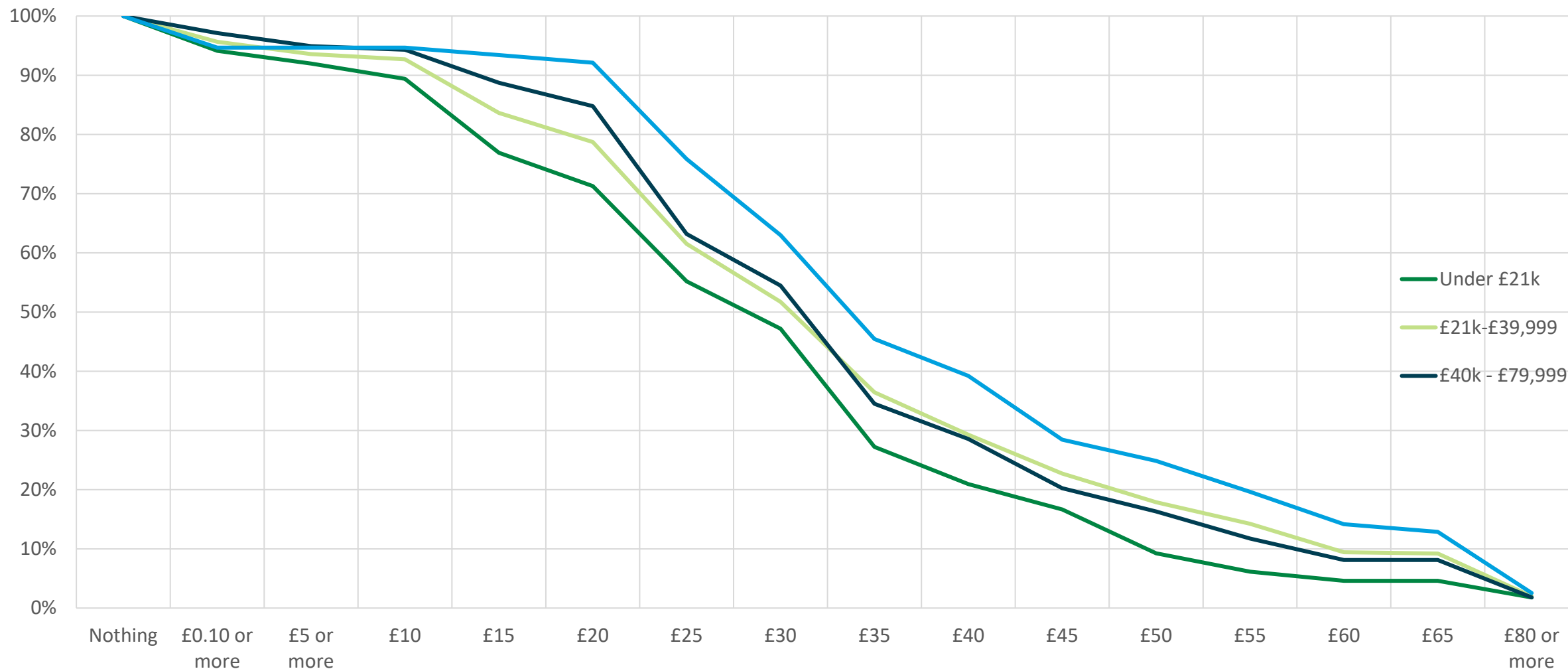
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Willingness to Pay (Informed): Age



Base: All respondents giving valid WtP (1564) Q22 (UNINFORMED). How likely or unlikely would you be to buy the syphon product for [PRICE]? Q24 (INFORMED) The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?

Willingness to Pay (Informed): Income band



Base: All respondents giving valid WtP (1564) Q22 (UNINFORMED). How likely or unlikely would you be to buy the syphon product for [PRICE]? Q24 (INFORMED) The parts that are currently on the market to fix a leaky toilet are priced between £20-35 on average. With this in mind, would you still be willing to pay a maximum of [PULL THROUGH MAXIMUM PRICE BRACKET SELECTED AT Q22 OR PRICE GIVEN AT Q23] for the syphon?