

Long Term Delivery Strategy Ambition Testing



Water for the North West

United Utilities

Final Report, April 2023



pwc



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Objectives and approach

Background

As part of Ofwat's upcoming Price Review (PR24), United Utilities will be required to set out their five-year business plan in the context of a 25-year long term delivery strategy (LTDS).

The aim of this research is to inform the development of United Utilities' long term ambitions beyond statutory requirements and provide evidence the strategies are informed by customer preferences in two key areas:

1. **Ambition:** Ofwat expects any long-term objectives to be informed by customer views
2. **Strategy:** Ofwat expects companies to use evidence of customer priorities and preferences to inform the selection and sequencing of investments up to 2050

Qualitative research was conducted that captured representation from United Utilities' range of customer types, including across regions, as well as vulnerable audiences and future bill payers.

Research objectives

1. To understand customers' views, long term priorities and expectations from United Utilities
2. To explore and gauge customer perceptions of United Utilities' identified ambitions, views, future plans and expectations against a variety of backdrops, including United Utilities' Future Scenarios
3. To explore how perceptions, priorities, views and expectations vary across customer segments
4. To evaluate customers' views on intergenerational fairness, focusing on the balance of responsibility for paying for investment between current and future customers

Methodology overview

A virtual approach was chosen to offer greater inclusion across geographics, demographics and types of vulnerability, with additional support for digitally excluded audiences to take part.

Desk research

Previous United Utilities **research into customer priorities was reviewed** to avoid duplicating effort and to inform the research design

Previous feedback was used to design research stimulus that was **accessible and easy to understand** for participants. The **stimulus was cognitively tested** with members of the public to clarify levels of understanding prior to starting fieldwork

General public & future bill payer groups

8 x 120 minute online focus groups with bill paying customers - each session with 5-6 participants, with a sample of customers representative of the region

2 x 120 minute focus groups with 4-5 'future bill payers' (a sample of 18-29 year olds representative of the region, who are yet to start paying for their water bills due to their living situation)

Non-Household customer groups

2 x 90 minute online focus groups with a range of NHH customers across the North West and a range of sectors/industries

A **variety of small, medium and large businesses** were recruited with a split between **high water use** and **lower/medium water use** customers

Vulnerable depths

12 x 60 minute online / telephone depths with potentially vulnerable customers

Representation was achieved across **physical and mental needs, financial vulnerability, need for consistent access to water and digitally excluded customers**. Some interviews were conducted offline to accommodate the participants needs

1 to 1 conversations were conducted with this audience to accommodate any potential sensitivities of the topic

Post task and follow up interviews

20 x 15 minute follow up online interviews with selected customers to explore how views had developed and to provide additional layers of insight

Participants were asked to complete an **audience journalism task with friends and family from different generations**, and record their **reactions to the ambitions and intergenerational fairness** as well as reflect on their own choices / opinions from the first research session

NB: Sub-group analysis was conducted, with any differences by audience and demographics highlighted throughout the report

LTDS Phase 1 and Ambitions Background Information

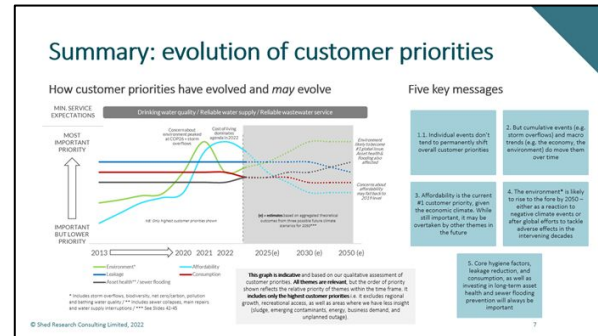
As part of this suite of research, United Utilities **undertook an Insight Synthesis as Phase 1**. This activity looked to explore:

1. How customer priorities have changed over time
2. How events impact views and what this tells us about similar events happening in the future
3. How priorities might change in different future scenarios

We used a variety of data sources including ad-hoc research at the time, customer service data, social listening and verbatim comments. This research took into consideration **11 significant water and wastewater events**, including the Beast from the East, general dry weather/hosepipe bans in the South and COVID-19.

The ambitions tested throughout this Phase Two of customer research for the Long Term Delivery Strategy were derived from the Insight Synthesis in Phase 1, and the following sources:

- The ambitions were determined as a result of regulatory drivers set by Ofwat, the Environment Agency, Defra and the Drinking Water Inspectorate
- The commitments were outlined when developing our long term strategic plans such as the DWMP, WRMP and WINEP based on engagement with customers about the services United Utilities deliver and long term challenges
- Finally, all of the long term ambitions have been reviewed by the United Utilities executive, who considered wider ambitions shaped by the priorities customers and stakeholders



Sample design - Focus groups

United Utilities customers were recruited from a range of demographic and geographical backgrounds, including a mix of customers across Merseyside, Cumbria, Lancashire, Greater Manchester and Cheshire

| General Public online focus groups: 8 x focus groups (5-6 participants per group) | Age Under 40 | Age Over 40 | Total |
|---|-----------------|----------------|----------|
| Inner City | 1 | 1 | 2 |
| Suburban | 2 | 2 | 4 |
| More Rural (village/countryside) | 1 | 1 | 2 |
| Total no. groups: | 4 | 4 | 8 |

| Future Bill Payers online focus groups: 2 x focus groups (4-5 participants per group) | Age 18-22 | Age 23-29 | Total |
|---|--------------|--------------|----------|
| Total no. mini groups: | 1 | 1 | 2 |

| Non-Household Customer focus groups: 2 x 90 minute virtual sessions (5 per group) | Lower / medium water use | Higher water use | Total no. of groups |
|---|--------------------------------|------------------------|------------------------|
| Small / medium / large business | 1 | 1 | 2 |

Other criteria and quotas: Across the sample we included a mix with regard to:

- Gender
- Ethnicity (including at least 1 BAME participant per group)
- Social grade
- Income
- Employment
- Children at home
- Living stages e.g. working full time, retired
- Engagement with water, including water saving behaviours
- Engagement with environmental issues
- Split of metered/unmetered customers

*Detailed sample breakdown can be found in appendix

Sample design - Potentially vulnerable customers

Potentially vulnerable customers were recruited across Merseyside, Cumbria, Lancashire, Greater Manchester and Cheshire and were provided with additional support where needed to access the research stimulus and take part in discussions

| Potentially Vulnerable and PSR Customer depths: 12 x 75 minute in-depth interviews | Total |
|---|-----------|
| Customers with mobility issues | 2 |
| Low income / financially vulnerable | 2 |
| Customers with a heightened need for consistent access to water | 2 |
| Customers dealing with mental health issues | 2 |
| Digitally excluded customers | 4 |
| Total no. interviews: | 12 |

Other criteria and quotas: Across the sample we included a mix with regard to:

- Age, including elderly participants (70+)
- Participants from border areas
- Social grade
- Engagement with water
- Even split of metered/unmetered customers

Sample design - follow up interviews

A selection of United Utilities customers who took part in the focus groups or depth interviews across Merseyside, Cumbria, Lancashire, Greater Manchester and Cheshire were selected to take part in a follow up interview

| Follow up interviews: 20 x 15 minute follow up interviews | | | | | | | Total |
|--|--------|---------|------------|-----------|---------|-------|-------|
| General Public | | | | | | | 11 |
| Future Bill Payers | | | | | | | 3 |
| NHH | | | | | | | 3 |
| Potentially vulnerable customers | | | | | | | 3 |
| Total no. interviews: | | | | | | | 20 |
| Who they spoke to | Family | Friends | Colleagues | Neighbour | Younger | Older | |
| Total: | 23 | 9 | 6 | 2 | 13* | 24* | |

Other criteria and quotas: Across the sample we included a mix with regard to:

- Gender
- Age
- Location
- Ethnicity
- Location
- Engagement with water
- Metered/unmetered customers

Why them:

- Understand the viewpoints of different generations (young and old)
- Different living situation - family, financial, disability, employment
- Differing focuses - environmental, cost
- Area they currently live in

* A few respondents spoke to people of same age but had different demographics (e.g. location / income levels)

Methodology overview: Discussion flow

Topic guide

1.

General Water Views: Purpose was to understand attitudes and behaviours when it comes to water and wastewater, and participants views of water-related issues. Interactive exercises helped to engage customers and warm them up to the topic.

Task 1: Customers were asked to sort everyday household activities by their water consumption e.g. toilet flushes, baths. This helped customers think about how their water use compared to national averages and warm them up for future activities

2.

Immersion in future scenarios: Customers were taken on a journey through time and immersed in two extreme different future scenarios, to encourage them to consider how United Utilities' Ambitions might apply in different scenarios and the challenges facing the water industry in the future. (Slide 12). Customers were also shown images from present day and 25 years prior to encourage thinking on how life can change in 25 years.

3.

Reaction to the ambitions: Purpose was to explore more detailed perceptions of United Utilities' ambitions and potential levels of investment in each, and understand how customers priorities varied across the ambitions. They were probed on Intergenerational fairness throughout this section to understand views on how investment should be spread between generations (Slide 14)

Task 2: Ambitions Investment - Participants were shown each ambition in turn and asked to select the level of investment they would choose and their reasons (Slide 13)

Task 3: Investment trade off - Participants allocated funding across the ambitions to explore if/how priorities changed after discussion/debate during the session (Slide 13)

Methodology Overview: The scenarios

Using AI technology, a series of innovative, virtual scenarios were produced to engage and aid consideration of priorities for the long term future of water. Previous research has shown customers can struggle to consider long-term implications of water investment¹, these scenarios helped customers consider how water usage has changed over time and reflect on how United Utilities future ambitions might apply in two, extreme future scenarios. Alongside the scenarios, music was also used to help transport respondents to different time periods and to help visualise a different way of life:

The Past (1998)



🎵 Oasis: Wonderwall

A house from 25 years ago encouraged consideration of how water usage and life has changed and how different challenges and ambitions would have been in 1998.

The Present



🎵 Harry Styles: As It Was

Present day house reminded participants how life has moved on since 1998 and the challenges these differences has created.

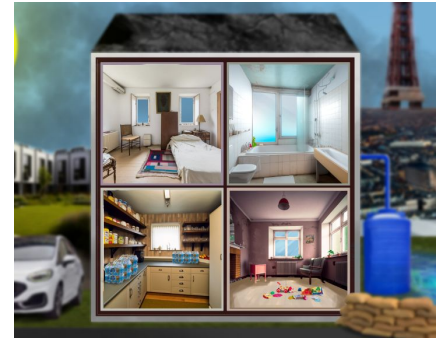
Green Guardianship Future



🎵 Nature Sounds

Two extreme scenarios 25 years in the future - 'Green Guardianship' and 'Climate Inaction/Chaos' future - to encourage thoughts about how the world might change, and how this could impact what United Utilities need to deliver on. E.g. Climate Inaction/Chaos future highlighted potential water disruption due to dry weather events/outages, using imagery of emergency bottled water in the kitchen.

Climate Inaction/Chaos Future



🎵 Traffic Noise

Methodology overview: Ambitions and customer priorities

To help participants understand and immerse themselves in United Utilities ambitions, stimulus was designed to provide clear explanations of each ambition and how different levels of investment impacts outcomes. This was also shared as a pre-read before the session to maximise understanding.

Maintaining our Pipes and Pumps


Ambition: Maintain United Utilities' huge network of 654 treatment works and 120,000km of clean and wastewater pipes across the North West

United Utilities want to be able to plan for how they can effectively invest in these systems to:

- Help maintain their efficiency and condition
- Reduce costly and disruptive failures
- Maintain consistent supply to household and businesses



Maintaining our Pipes and Pumps



| Maintaining our Pipes and Pumps | | |
|--|---|--|
| Option 1 | Option 2 | Option 3 |
| Some investment today in pumps and pipes, although on average these will be getting older. | More investment today in pumps and pipes, targeting the worst assets and starting to replace some of our long life assets | Significantly more investment today in pumps and pipes, fairly large new programmes of asset replacement |
| £ | ££ | £££ |
| High future costs and increasing risk of major failure likely | Slowly increasing future costs and stable risk of major failures | Stable future costs and reducing risk of major failures |

Moderate allocated spend
High allocated spend

Exercise 3: Funding the ambitions

How would you allocate funding across the 6 ambitions?

Drinking Water Quality



Carbon Net Zero



Water usage



Social Value



Maintaining our pipes and pumps



Sewer Flooding



Ambition background

For each ambition, participants were walked through the background and aims of the ambition, including potential types of investment.

Ambition Investment Exercise

Participants were presented with three investment options, with varying impact on their water bill (each £ represented approx. 50p extra annually). Each participant was asked to choose their investment level and reasons for this.

Investment trade off exercise

A final exercise requested participants to allocate funding across the ambitions to explore if/how priorities changed after discussion/debate during the session. Each participant had 10 bags of money that they could distribute freely across the ambitions.

Methodology overview: Intergenerational fairness & follow up interviews

Initial sessions: Establishing views on intergenerational fairness

(How the costs of providing water services and future investment by United Utilities is distributed among different generations of customers.)

Throughout the sessions and ambition discussions, participants were **probed on the balance of responsibility among current and future customers** for paying for investment.

AI Visualization of the two, distinct **future scenarios helped participants to think about how the world could change for future generations** and encouraged debate and discussion.





How do we pay for investments?

We need to think about the balance of responsibility amongst current and future customers for paying for investments:

How could we pay for this?

- **Option 1:** Make additional investments to 'future proof' now so that fewer problems arise in the future. An increase in bills would start sooner, spreading increases across different generations of bill payers
- **Option 2:** Invest less in 'future proofing' now and tackle any future issues as and when they arise. The increase in bills would start much later (ie, years down the line) and would cost more to fix

Exercise 2b: How we pay for investments (Daughter, Age 18)

| Ambition | | Option 1 | Option 2 |
|--|---------------------------------------|-------------------------------------|-------------------------------------|
|  | Maintaining Pipes and Pumps | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|  | Water quality: Drinking Water Quality | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|  | Water quality: Lead Pipe Removal | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
|  | Carbon Net Zero | <input type="checkbox"/> | <input checked="" type="checkbox"/> |

Part of PwC designed post-task

Follow-up interviews: Exploring how views and attitudes develop

A selection of participants took part in a further session, with an audience journalism task ahead of this, to understand the views of their family/friends from different generations, and then report back what they found in a reconvened depth interview.

We explored participants discussions and debates with their friends/family, particularly around intergenerational fairness, any changes in their priorities after a period of reflection and their understanding of the stimulus materials shown.

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 to inform the development of United Utilities' long term ambitions, looking at customer preferences to different investment options. The research captured representation from United Utilities' range of customer types, regions, as well as vulnerable audiences and future bill payers. A review of existing research was also conducted

Fit for purpose

This research used online focus groups and in-depth interviews to understand customer sentiment of six different ambitions, using different investment option tables containing information on various service levels and bill impacts. Innovative, AI visuals of different future based scenarios were also created in order to engage and aid consideration when thinking about future customer priorities. A Mural was designed to create interactive tasks to encourage engagement and present ambition summaries in more digestible formats. Cognitive testing was carried out during the design phase to ensure the complex subject matter was presented in a way which was as understandable and engaging as possible

Shared in full with others

The full final report and research materials will be shared on the United Utilities' research library webpage

Continual

The customer ambition testing from this research will be directly fed into the final plan submission for the long-term development strategy of PR24, alongside other customer priorities research and long term delivery strategy research

Neutrally designed

Every effort has been made to ensure that the research is neutral and free from bias. 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

Inclusive

A mix of online and telephone interviews were conducted to ensure that digitally vulnerable and hard-to-reach customers were included in the research. Quotas were set based on the known profile of United Utilities' customers, including age, gender, ethnicity and social grade

Ethical

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

Independently assured

All research was conducted by PwC, 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

Main findings

General water views

Water behaviours were currently seen as less of a priority than energy

The lack of choice and relatively low impact of the water bill meant customers were less engaged with water and United Utilities compared with other utilities:

- **Water bills don't have the same cost impact** as other household bills (eg, gas, electric). Therefore **energy saving behaviours were adopted more widely**
- Unable to choose their water provider and shop around meant **United Utilities was not compared with other water providers**
- **Wastewater was rarely thought about** and knowledge of United Utilities' role was low

Triggers to greater engagement with water:

- Experience of water-related issue e.g. interrupted water supply, sewer flooding
- Sharp increases in water bills
- Local United Utilities temporary works including digging up roads/pavement (may disrupt commute, cause diversions, create noise pollution and/or seen as an eyesore)
- United Utilities advertisements - especially connected to local weather forecast
- Increased awareness of the environmental impact of water wastage. This can be through education (e.g. United Utilities advert, children's learning at school), coverage of the topic in the news, friends/family that inspire action

“““

“I think the reason I don't think about it is it's not something you have a choice about. It's not like choosing an energy provider or anything else at home. You get who you are given.”

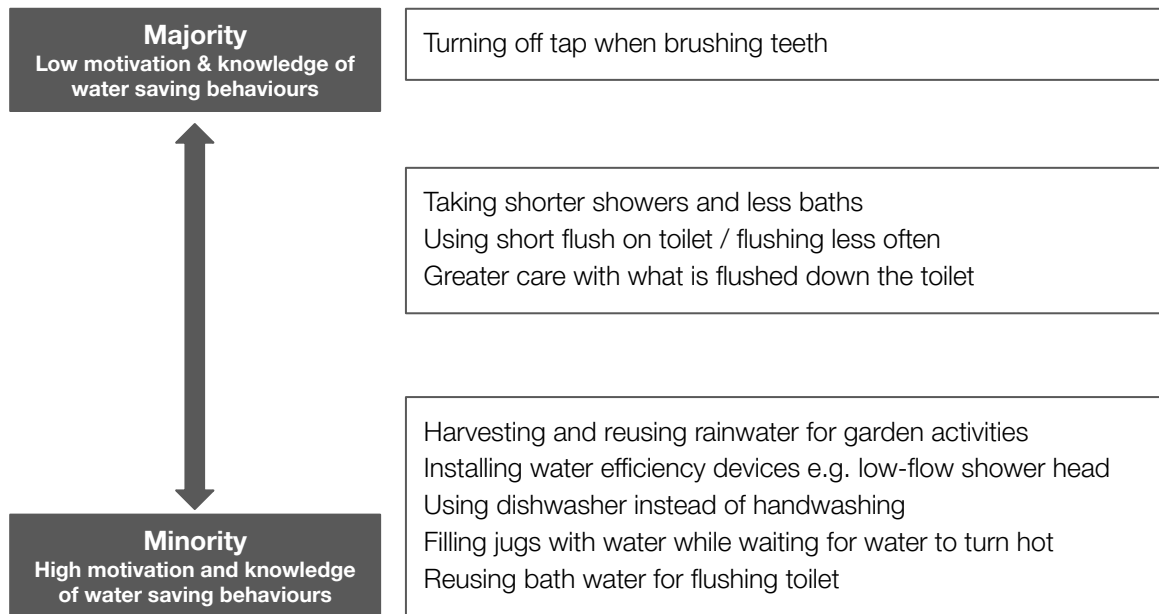
General Public, Over 40, Greater Manchester, Inner city

“I just take for granted that the wastewater goes out one way and I get nice fresh clean water out of the tap.”

Vulnerable, Over 40, Greater Manchester, Inner City

Small water saving behaviours are common, but level of action and knowledge are patchy

Most don't think about water as a finite resource, apart from customers that had experienced water restrictions e.g. hose pipe ban. As a result, customers hadn't adopted many water saving behaviours day to day.



Throughout the sessions there were references to United Utilities' advertisements which helped to raise awareness of common water issues and this had impacted behaviours

United Utilities' role is seen as providing clean water and network maintenance with customers struggling to identify areas beyond this

Initial views of United Utilities

Aware and expect the core service responsibilities:

Safe drinking water

Consistent water supply

Reduce supply disruption

Reduce sewer flooding



Occasionally recognised/recalled:

Wastewater treatment

Return treated wastewater

Encourage wise water use



"Social value surprised me a little bit. The access to recreational space and improving employment opportunities are something I don't think align to what they need to do."

General Public, Under 40, Greater Manchester, Inner City

More surprised by these wider roles:

Environmental projects

Social Values

Considered a lower priority for United Utilities



Drivers to change water consumption and wastewater behaviour were influenced by a number of factors

Customers views and priorities were shaped by the extent these drivers influenced their decision making

Direct or indirect experience:

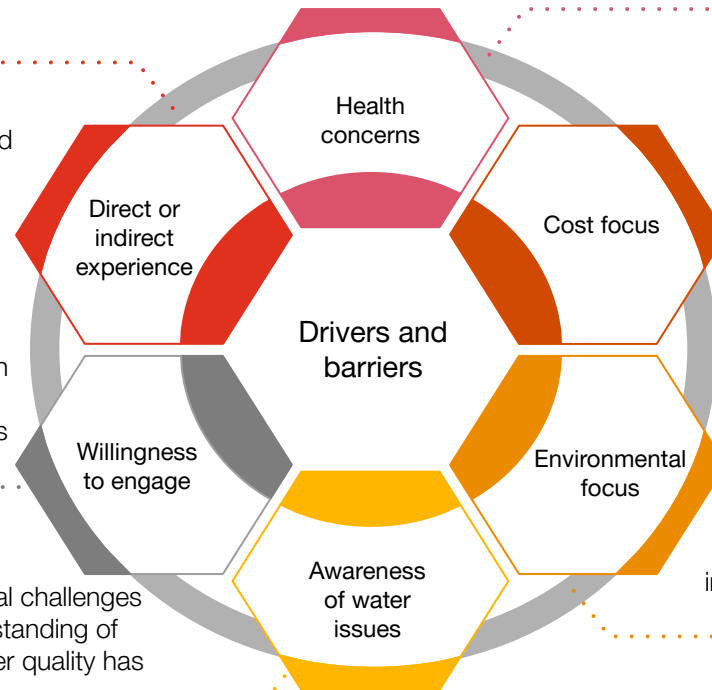
Water-related emergencies experienced individually or by friends/family e.g. sewer flooding, discoloured tap water

Willingness to engage:

Willingness to take personal responsibility for actions and motivation to change behaviour, in order to make things better now for future generations

Awareness of water issues:

Awareness and concern about potential challenges e.g. water scarcity in future and understanding of the impact the water network and water quality has on their life



Health concerns:

Concerns about health and wellbeing linked to United Utilities services and responsibilities e.g. lead pipe removal

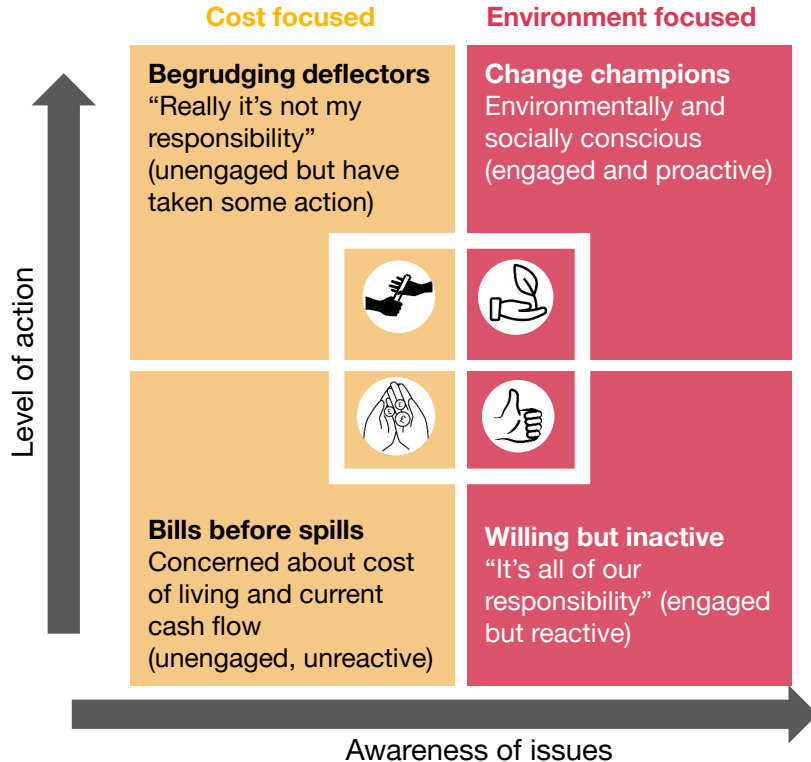
Cost focus:

The extent the customer was focused on saving money and keeping costs down

Environmental focus:

Levels of concern about environmental impacts and climate change/skepticism of climate change

Emerging personas: level of action, awareness of issues and cost sensitivity strongly influenced customer priorities



Introduction to personas

A matrix of four personas emerged across the household sessions, based on drivers they were most influenced by and their current engagement. This included:

- **Levels of awareness/engagement** in issues around water consumption/wastewater
- **How much action** they were willing and able to take day to day to reduce consumption and change behaviours
- How this was perceived as a **personal responsibility** or a **responsibility for the government/water companies/others**

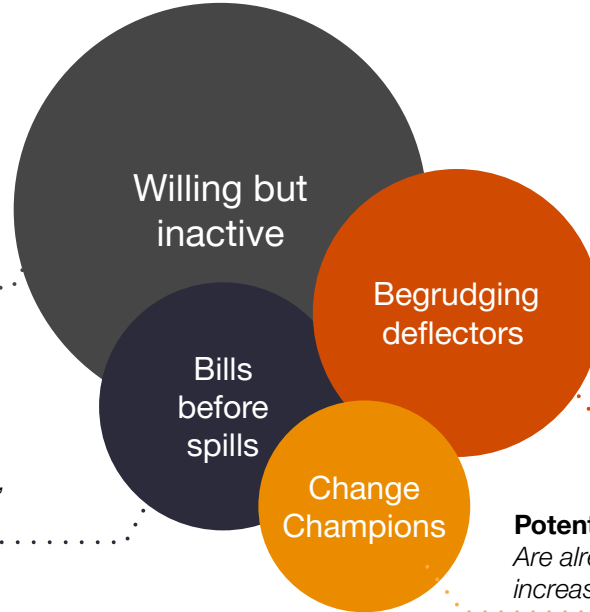
These personas **strongly influenced customers reactions to the ambitions** and their expected priorities from United Utilities’ strategy

Health concerns and **direct and indirect experience resonated across customers** and were strong influencers of choice and priorities, regardless of persona

The majority of customers had the potential to become more engaged in water-related issues and taking action

Potential to encourage action: High

Need actions and behavioural changes clearly communicated and their benefits



Potential to encourage action: Medium

Open to make small changes but need reassurance of wider actions taken by business/government

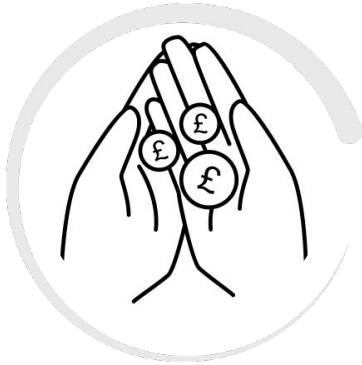
Potential to encourage action: Low

Unengaged and low motivation to change, less likely to change their behaviours

Potential to encourage action: High

Are already taking action, further education can help increase their impact and influence on others

NB. Size of circle represents prevalence in sample



Bills before spills

Price sensitive customers that prioritise immediate savings on bills and a focus on United Utilities 'core' services i.e. water quality and network maintenance, over other services which are perceived to be 'above and beyond' e.g. social values

"I've got a bit of a selfish take. I don't have children, so I'm not really that worried about future generations. I'm more worried about what it's gonna cost me in 20 years time."

Vulnerable, Over 40, Greater Manchester, Inner city

Who are they?

Engagement and action

Unengaged in issues about water consumption and the environment, and unreactive in their actions. **Less willing to pay for ambitions**

Cost and environment focus

Very sensitive to bill increases, especially low income customers who feel they can't pay more or large families with high water usage.

Ambition reactions

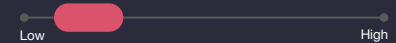
Bills before spills customers are **less likely to consider the bigger picture and wider societal impact of increased water investment** e.g. Social Values ambition, instead preferring investment in United Utilities core responsibilities: Network Maintenance, Drinking Water Quality and Lead Pipe Removal. These are seen to have a **more immediate and personal benefit**

"I am a single mum and water is one of my biggest outgoings... Maybe they could start [bill increases] a year down the line, if they give us something to work towards and prepare for?"

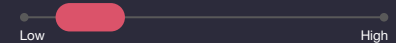
General Public, Over 40, Merseyside, Suburban

Traits

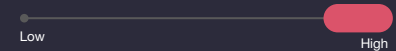
Level of action



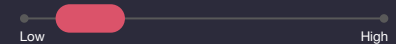
Engagement



Cost focus



Environment focus



Key drivers/barriers

Cost focus

Highly motivated to save money. For some, cost of living pressure on household makes them very sensitive to bill increases.

Trust

General lack of trust that investment now will save money/provide clear benefits in the long term.



Begrudging defectors

Customers that have made small changes in behaviour, but characterised by believing change and investment should be driven by government/big business, and not individual households

“The support for people struggling to pay their bills [Social Values]. I don't think that should fall on us as consumers to subsidise that.”

General public, Over 40, Lancashire, Rural

Who are they?

Engagement and action

Have **taken some action on water use** e.g. taking shorter showers, but do so begrudgingly and are **generally unengaged with water and environmental issues**

Cost and environment focus

Prioritise cost of water bills over improving environmental and societal impacts of the water industry as they believe that this is the responsibility of the government/businesses, not the customer

Ambition reactions

Less likely to want to pay towards ambitions seen as 'above and beyond' United Utilities core remit: Carbon Net Zero, Social Values and reducing customers water consumption. These ambitions are still seen as beneficial, but they do not think the customer should have to foot the bill

“I'm not naive to the fact that they won't put the costs up, but I think meeting people halfway at least and suggesting that we're [United Utilities] putting X amount of money towards this out of profits. That would be welcome.”

General Public, Over 40, Cheshire, Inner City

Traits

Level of action



Engagement



Cost focus



Environment focus



Key drivers/barriers

Cost focus

Are keen to maximise cost savings and share the cost of investment with government/businesses

Rewards/incentives

Keen on the idea of businesses offering incentives to encourage households to change behaviour and save water



Willing but inactive

Can see how future challenges facing the water industry are a collective responsibility (reinforced by future scenarios) and are happy to do their bit, but have not changed their current behaviours

"I do understand the global warming and climate implications... But my mind goes more to electricity than it does water consumption, which is probably something I should work on."

Future Bill Payer, 18-23, Greater Manchester, Suburban

Who are they?

Engagement and action

Take **personal responsibility** and 'do their bit' but have currently not changed behaviours a great deal due to a **lack of prior knowledge and awareness of water issues**

Believe it's a **shared responsibility** between customers, businesses and the government to **take action**

Cost and environment focus

Clear environmental benefits take priority cost savings, but often need to be made clear

Ambition Reactions

React positively to United Utilities ambitions considered 'core' to its service: Network Maintenance and Drinking Water Quality, and are also willing to pay for investment in services that have long-term positive environmental and social impacts **once benefits have been made clear** e.g. Social Values and Carbon Net Zero

"I don't think we are particularly careful. Yeah, I'll turn the tap off when brushing teeth and stuff like that, showers not baths. Tiny things. But I'm not really thinking about it that much."

General Public, Under 40, Lancashire, Rural

Traits

Level of action



Engagement



Cost focus



Environment focus



Key drivers/barriers

Environmental benefits

Willing to change behaviours when the benefits to the environment are made clear.

Level of awareness

Generally unaware of the environmental impact of water use/wastewater and therefore have done little to change their behaviour in response.



Change Champions

Actively and socially conscious customers who want to see improvements in the water network that benefit all customers and the environment.

"We now live in a society where there's so much waste and we just take so much for granted. I think we've got to conserve it, we've got to be careful with it and we've got to not waste it, whether you're on a meter or you're not."

Vulnerable, Over 40, Cheshire, Suburban

Who are they?

Engagement and action

Very aware of water issues/social challenges, and have considered the climate inaction/chaos vision of the future scenario. Actively reduce their water consumption and wastewater e.g recycling rainwater, fewer toilet flushes and encourage those around them to do the same.

Cost and environment focus

Environmental and socially conscious customers. They are **engaged and proactive**, implementing a wide range of behaviour changes in their household **to save water and protect the environment**.

Ambition Reactions

These customers are very receptive and more willing to pay for ambitions that aim to **support vulnerable customers and positively impact society** e.g. Social Values and Carbon Net Zero. They are **more likely to consider the bigger picture** of the benefits investment can bring across the ambitions

"I'm in a position to be able to pay a little bit more to ensure all the people get clean water."

General Public, Under 40, Merseyside, Inner City

Traits

Level of action



Engagement



Cost focus



Environment focus



Key drivers/barriers

Environment

Protecting the natural environment is a priority and are keen to invest in ambitions that deliver environmental improvements e.g. Net Zero.

Social consciousness

A desire for United Utilities to help address some of the main challenges their society faces e.g. affordability, public health.

Introducing the ambitions

A summary of the ambitions tested with customers



Carbon Net Zero

United Utilities will reach Carbon Net Zero by 2050 by switching own vehicles to electric or alternative fuels, investing in tech that emits less carbon and planting more trees



Water Usage

Consumption
Support and educate customers on how to increase efficiency of their water usage

Leaks

Proactively reduce leaks, prevent clean water being wasted through the use of technology and enhanced network monitoring



Sewer Flooding

Minimise sewer flooding by investing in technology to proactively identify issues / blockages and increase the capacity of sewer network



Water Quality

Drinking Water Quality
Maintain high quality water with a reduction in customer contacts regarding taste, smell and appearance of drinking water (ie, treat algae growth in reservoirs/rivers which can affect quality)

Lead Pipe Removal

Continue and expand support for customers to identify and replace lead pipes. The Government advises that all lead pipes are replaced by 2070



Maintaining Pipes/Pumps

Maintain efficiency and condition of the network of treatment works and pipes to ensure a consistent supply and reduce costly and disruptive failures



Social Value

Green Space
Improve access to green & recreational spaces (eg, creating water sports, paddling boarding and recreational clubs)

Jobs/Support

Supporting vulnerable customers who struggle to pay their bills. Supporting jobs across the region along with upskilling and training schemes

Initial reactions focused on prioritising ambitions that had the biggest impact on daily lives and more top of mind social issues

Higher Priority



**Drinking
Water
Quality**



**Lead Pipe
Removal**



**Maint.
Pipes &
Pumps**

**More direct impact on their lives
therefore a big priority area for most**

“Our drinking water quality is really important as we get guests from all over the world and they quite often ask “is the water okay to drink?””

NHH, Low / Medium Usage, Cumbria

Medium Priority



**Water
Leakage**



**Water
Usage**



**Sewer
Flooding**



**Social Values:
Jobs/Support**

**Key areas of water management or
addressing top of mind social issues
therefore some focus expected**

“I think making people aware of how efficient they can be and what they’re actually doing with water is something I think is great.”

Future bill payers, 18-22, Greater Manchester, Suburban

Lower Priority



**Carbon Net
Zero**



**Social Values:
Green Space**

**Not considered to be a key
area of focus for United
Utilities**

“I personally think things like carbon net zero should be more liable to the company than it should be to the customer.”

**Future bill payers, 18-22, Greater
Manchester, Suburban**

Future scenarios

The scenarios: A journey through time

Using AI technology, a series of innovative, virtual scenarios were produced to engage and aid consideration of priorities for the long term future of water. Previous research has shown customers can struggle to consider long-term implications of water investment¹, these scenarios helped customers consider how water usage has changed over time and reflect on how United Utilities future ambitions might apply in two, extreme future scenarios. Alongside the scenarios, music was also used to help transport respondents to different time periods and to help visualise a different way of life:

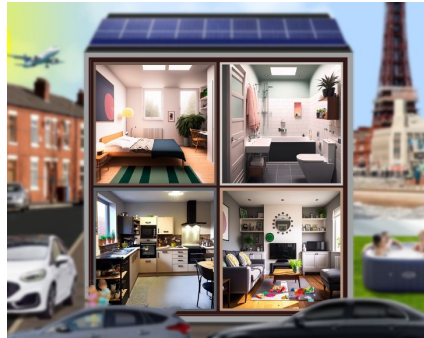
The Past (1998)



🎵 Oasis: Wonderwall

A house from 25 years ago encouraged consideration of how water usage and life has changed and how different challenges and ambitions would have been in 1998

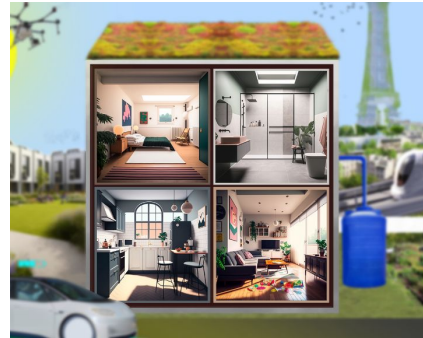
The Present



🎵 Harry Styles: As It Was

Present day house reminded participants how life has moved on since 1998 and the challenges these differences has created

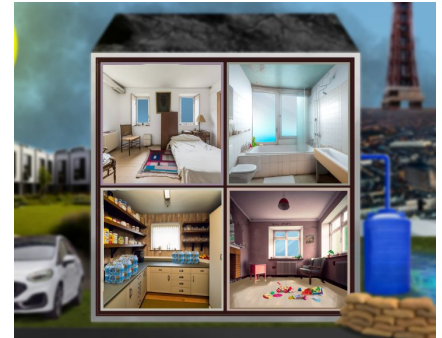
Green Guardianship Future



🎵 Nature Sounds

Two extreme scenarios 25 years in the future - 'Green Guardianship' and 'Climate Inaction/Chaos' future - to encourage thoughts about how the world might change, and how this could impact what United Utilities need to deliver on. E.g. Climate Inaction/Chaos future highlighted potential water disruption due to climate change, using imagery of emergency bottled water in the kitchen

Climate Inaction/Chaos Future



🎵 Traffic Noise

Respondents reflected that less consideration was given to water usage and climate change in 1998

Overall reactions

- Water tended to be more freely used with less consideration given to water usage and the amounts being used
- The scenario highlighted the presence of different water usage behaviours back then. For example, baths were more common and there were fewer household appliances used

The Ambitions:

- Respondents reflected that climate change was less of a concern in 1998, therefore imagined that United Utilities had less of a focus on carbon net zero
- The impact of sewer flooding was probably lower too as there was less pressure on the sewers due to smaller populations and lower impact of climate change

“I don’t think United Utilities would have been thinking about carbon net zero. There’s nowhere near the kind of corporate and social responsibility that you see for companies these days.”
General Public, Over 40, Lancashire, Inner City

The Past (1998)



The present day scenario highlighted how changing behaviours have impacted on water usage and climate change

Overall reactions

- Respondents acknowledged the increase in water usage since 1998; hot tubs, dishwashers, jet washers, power showers are more common, creating more water waste
- Levels of pollution have worsened, with more cars on the road, more gadgets and technology being used
- Changes in climate change and temperatures are quite stark

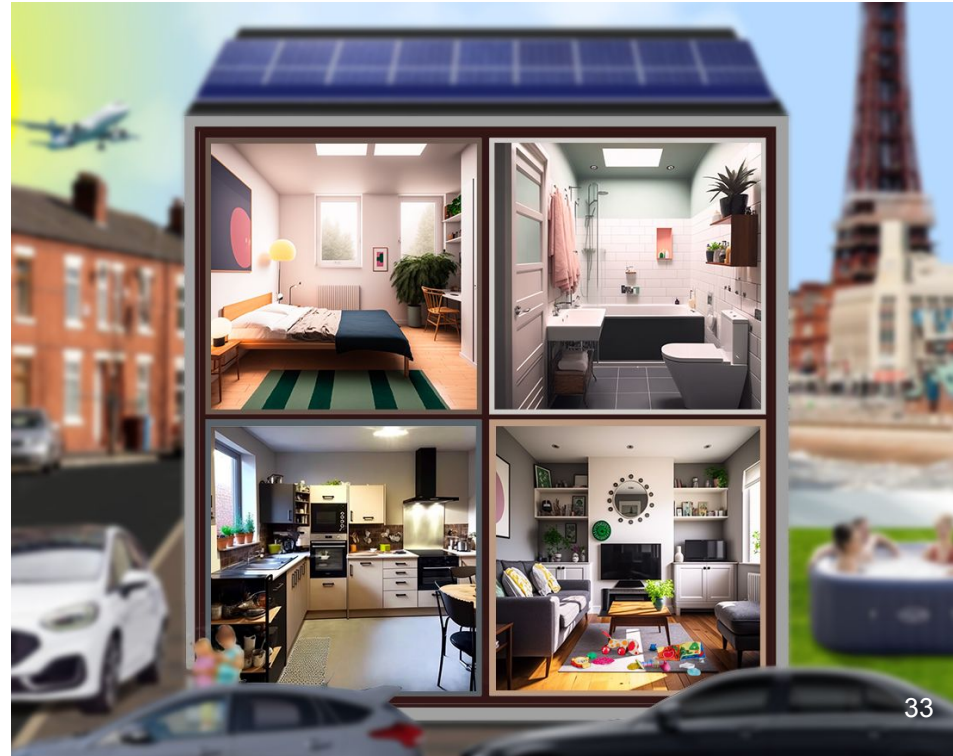
The Ambitions:

- Carbon net zero and water usage are more of a focus compared to 25 years ago as the public are more aware of the environment and mindful of their water usage

“We’ve got most people that have hot tubs now and they take a lot more water. I’ve only filled ours a couple of times as I know the cost and waste of it.”

General Public, Over 40, Merseyside, Suburban

The Present (2023)



The Green Guardianship future highlighted the positive impact that ‘acting now’ could have on their future lives and world

Overall reactions

- Encouraged consideration of water usage and the positive impact cutting back could have
- Changes to behaviours, such as no baths, water butts and electric vehicles were seen as likely
- These behaviour changes made the personal contribution to carbon reduction feel more realistic
- Shared community growing / gardens were popular with the more socially conscious, but the idea of the green roofs felt a little futuristic / unattainable for some

The Ambitions:

- Achieved by creating an infrastructure of green communal space, community jobs, action towards reaching carbon net zero early, whilst maintaining the core service (ie, quality water, maint. pipes/pumps)
- Assume some ambitions would require less investment beyond 2050 as the issues would have been addressed (ie, education, sewer flooding, lead pipes, carbon net zero)

“If we educate and change then hopefully our children and grandchildren can live in this scenario.”

NHH, Low-Medium Water Usage, Merseyside

Green Guardianship Future (2050)



Climate inaction/chaos scenario painted a concerning picture that accentuated the need to ‘act now’ and invest

Overall reactions

- An understanding from most that this version of the future could happen, especially from the environmentally aware
- Reinforces concerns about not acting now and delaying investments
- The prospect of a low or interrupted water supply was a big concern due to the direct impact it would have on their lives, though some still struggled to see how water could become a finite resource

The Ambitions:

- Sewer impact brought into sharper focus
- Highlights the need for immediate action educating on ‘why we need to act now’, especially on water usage
- Some, especially Change Champions, raised the importance of carbon net zero targets, although a few still not understanding the link with everyday pollutants

“It kind of looks like everything was left a little bit too late and now we’re having to deal with the consequences opposed to being able to tackle it earlier on.”

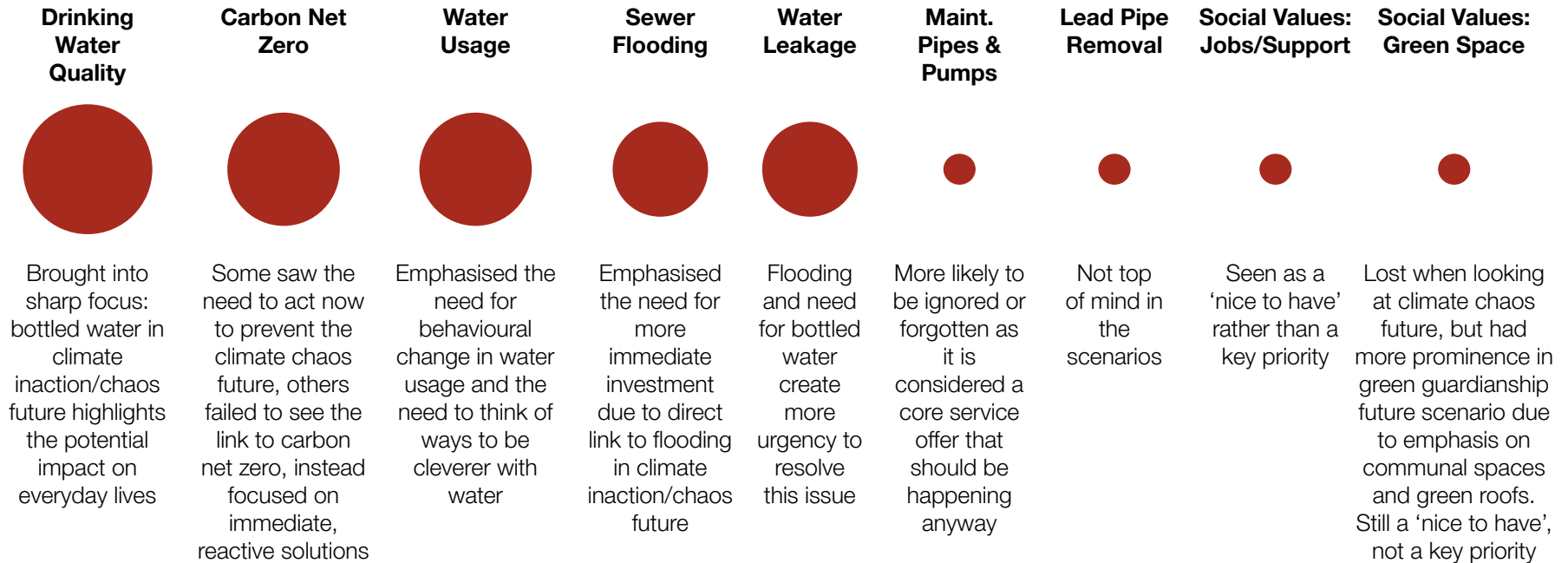
Future Bill Payer, 18-22, Greater Manchester, Suburban

Climate Inaction/Chaos Future (2050)



The future scenarios brought some challenges and ambitions into sharp focus, encouraging reconsideration of some of the priorities

Ambitions perceived as being emphasised by the future scenarios



note: size of bubble indicates priority of ambition



““”

Having to think back to 1998... Obviously, I was a younger girl whose parents dealt with the water bill. And then now, I've got my water bill, and I've got my kids. As a mother, I would like to ensure that going forward, that they're going to experience the same sort of quality that I've had all my life and that they're not going to suffer.

General Public, Over 40, Greater Manchester, Suburban

Detailed reactions to the ambitions

Overall there was little consensus, with opinions often split on how investment should be attributed to the ambitions

Reasons for selection:

Drinking Water Quality Lead Pipe Removal Maint. Pipes & Pumps Water Leakage Water Consumption Sewer Flooding Social Values: Jobs/Support Carbon Net Zero Social Values: Green Space

Option 1 level of investment:

More likely to be seen as a 'nice to have' e.g. green space, net zero, aside from water quality which received lower investment due to quality benchmarking



Option 2 level of investment:

Often seen as a 'compromise' for important issues but guarding against sizeable increases to their payments



Option 3 level of investment:

More of a consensus for higher investment if there was a health/wellbeing impact e.g. lead pipes or disruption to service



Note: size of bubble indicates number of responses

☆ = Most popular choice overall (strong consensus)

↔ = Most popular choice overall (split consensus)

Drinking Water Quality

Seen as a core service offer and basic human need therefore a priority ambition for most

Overall reactions:

- Drinking water is regarded as a core service offer and therefore a big priority for many
- Customers often express pride in the quality of the drinking water in the North West, with their drinking water acknowledged to be much better than in other areas of the Country
- Customers want and expect the high level quality drinking water to be maintained by United Utilities, with concerns about any potential drop in water standards

Audience differences:

- **All audiences:** Potential to have a direct impact across all audiences due to a daily need for access to quality drinking water
- **NHH:** Highlighted the damaging impact a drop in drinking water quality could have on their businesses, especially those in the hospitality industry



Drinking Water Quality: Ambition

Maintain high quality drinking water for customers over the long term:

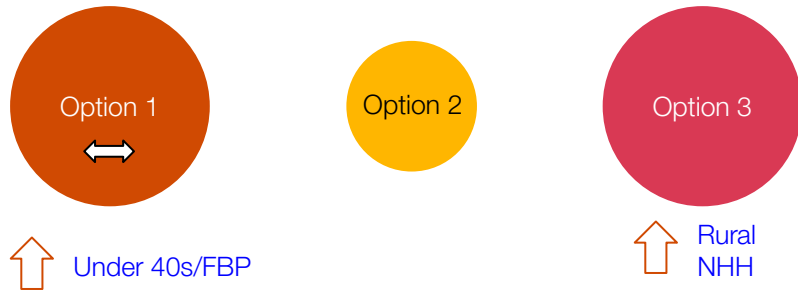
- Reducing impacts of climate change (e.g. algae growth in reservoirs and rivers), which can affect the taste of drinking water and require further treatment
- More extreme and frequent weather events which leads to an increase in sediment entering water courses



Higher Priority

Drinking Water Quality

A priority area for most, but opinions were split on the level of investment due to benchmarking



note: size of bubble indicates number of responses

| Drinking Water Quality | | |
|---|---|--|
| Option 1 | Option 2 | Option 3 |
| 4 complaints about taste, smell or appearance per 10,000 people by 2050 | 2 complaints about taste, smell or appearance per 10,000 people by 2050 | Less than 1 complaint about taste, smell or appearance per 10,000 people by 2050 |
| £ | ££ | ££££ |

Small allocated spend

High allocated spend

*Currently complaints are 14 per 10,000 customers

PwC | Confidential information for the sole benefit and

↔ = Most popular choice overall (split consensus)

Reasons for investment choice:

Option 1:

- Offers an improvement on the current water quality (ie, 14 to 4 complaints per 10,000 customers) so a solid option as customers are already happy with the current water quality so see little need to invest any more
- Also felt to be minimal difference between option 1 and options 2 & 3 so little reason to invest any more
- **Under 40s/FBP:** More likely to select; they have had less previous exposure to water quality issues

Option 2:

- Only a small increase in investment between option 1 and 2 and a big improvement in the water quality so seen as a good option for a minority

Option 3:

- Want to give maximum investment due to the potential big impact not investing could have on their daily lives
- **Rural:** Eager to invest more as more seemed to have experienced issues with water quality / knew others that had
- **NHH:** Potential to have a damaging impact on their businesses so seen to invest more heavily



Drinking Water Quality: In their words



I'll stick to that number one. I think four complaints in 10,000 is not bad at all....I've never had a problem, never ever, so I think it should be just maintaining what they've got now.

Vulnerable Customer, Over 40, Lancashire, Suburban

I'll go option 1 but just for how little the difference is between the options.

General Public, Over 40, Merseyside, Inner City

It's not that much across your annual bill so I'm happy to go for option 3, we're drinking it at the end of the day!

Future Bill Payers, 18-22, Merseyside

I really wouldn't invest in it that much, we have some of the best drinking water in the world in the northwest of England - and it's been proven and tested that it's absolutely no different to the stuff you buy in bottles from the shop.

Vulnerable Customer, Over 40, Greater Manchester, Inner City

Lead Pipe Removal

Potential health implications associated with lead pipes made this ambition stand out in importance

Overall reactions:

- Lead pipe removal was of high importance to customers, due to the potential impact lead pipes could have on customers' health, particularly pregnant women and children (most aware that lead is bad for health, but only a minority were spontaneously aware of the specific health implications)
- There was a general lack of awareness of how lead pipes can be removed and a lack of understanding of the difficulties United Utilities face in accessing people's properties
- Customers felt that the government should provide grants and support with this ambition, particularly as they have advised for their replacement by 2070

Audience differences:

- No audience differences due to the consistent and overwhelming need to limit the impact on customers health



Lead Pipe Removal: Ambition

The removal of lead pipes across the North West:

- The Government advises that due to potential health issues, all lead pipes should be replaced by 2070, but this is not a legal requirement (*)

(*) 2 groups and 3 vulnerable depths were shown the description above. Prior to this, 10 groups and 9 vulnerable depths were shown the below description:

Now the Government has issued a legal requirement that due to potential health issues, all lead pipes should be replaced by 2070

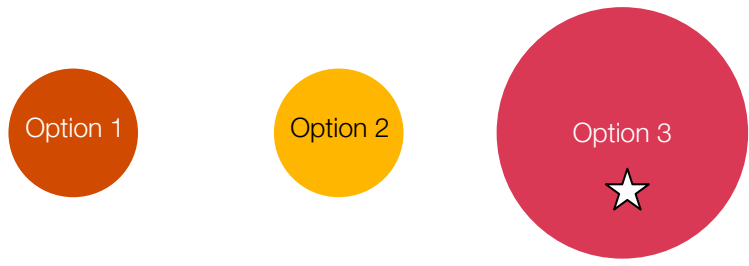
The change in wording didn't affect responses as the potential health implications associated with lead piping was the primary factor that made this ambition a priority



Higher Priority

Lead Pipe Removal

An important ambition, but many have a limited understanding of how important their role is



note: size of bubble indicates number of responses

| Lead Pipe Removal | | |
|--------------------------------|--------------------------------|--------------------------------|
| Option 1 | Option 2 | Option 3 |
| All lead pipes removed by 2070 | All lead pipes removed by 2060 | All lead pipes removed by 2050 |
| £££ | ££££ | £££££ |

Moderate allocated spend

High allocated spend

Reasons for investment choice:

Option 1:

- A minority were happy to be guided by the government and go with their suggested 2070 removal deadline, especially as they had not experienced any negative effects from lead pipes during their lifetime

Option 2:

- Typically those who were price conscious and want to spread the cost of the total bill across multiple ambitions

Option 3:

- Health implications of lead pipes are a major driver amongst customers for choosing Option 3
- Customers want this ambition to start as soon as possible. In fact, most feel that the ambition does not go far enough and should be achieved sooner due to the potential impact on customers' health
- Customers thought that the removal of lead pipes would also have a positive impact on other United Utilities ambitions too (ie, maintaining pipes and pumps, drinking water quality)



Lead Pipe Removal: In their words



I used to work in the lead industry, we'd get tested every six months (for lead content in blood) and I must have exceeded the limit at least five times, and to be honest with you, it's caused me quite a few health problems. I lost my appetite, I became irritable, I felt sick all the time, dizziness, I couldn't sleep, it caused my depression and anxiety... It's not something that anybody wants to get really.

Vulnerable Customer, Over 40, Greater Manchester, Inner City

[Option 3] the shortest length of time to get there, even though I'd still say that is totally way out of the time scale that it really should be.

Vulnerable Customer, Over 40, Greater Manchester, Rural

In my opinion, Option 3, where there is health implications, it's a no brainer really, I think it's the same as safe drinking water, it is important.

Future Bill Payers, 18-22, Greater Manchester, Suburban

If it affects pregnant women or children, it needs to be front and centre... I would hate to think that we've got children accessing water with lead when there's money there that can be invested and it can be changed out quite quickly.

General Public, Over 40, Lancashire, Inner City

Maintaining Pipes/Pumps

A high priority as it's a core service offer and had the potential to positively impact other ambitions too

Overall reactions:

- Seen as a core service offer and therefore a priority for United Utilities to invest in
- It also had the potential to help with other ambitions too (ie, water quality, lead pipe removal, leaks) therefore important to invest in
- Sometimes customers were confused between differences in the lead pipe replacement ambition

Audience differences:

- **Bills before spills:** felt the ambition was a core responsibility for United Utilities to personally invest in and struggled to understand why they should have any personal responsibility to pay for it



Maintaining Pipes/Pumps: Ambition

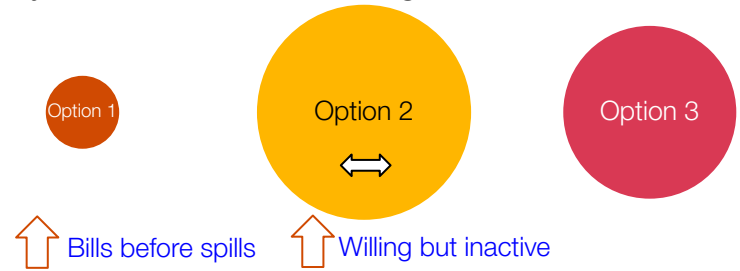
- Help maintain their efficiency and condition
- Reduce costly and disruptive failures
- Maintain consistent supply to household and businesses



Higher Priority

Maintaining Pipes/Pumps

Avoiding major failures and high future costs were key drivers when choosing their level of investment



note: size of bubble indicates number of responses

| Maintaining our Pipes and Pumps | | |
|---|--|--|
| Option 1 | Option 2 | Option 3 |
| Some investment today in pumps and pipes, although on average these will be getting older | More investment today in pumps and pipes, targeting the worst assets and starting replace some of our long life assets | Significantly more investment today in pumps and pipes, fairly large new programmes of asset replacement |
| No increase | ££ | £££ |
| High future costs and increasing risk of major failure likely | Slowly increasing future costs and stable risk of major failures | Stable future costs and reducing risk of major failures |

Moderate allocated spend

↔ = Most popular choice overall (split consensus)

Reasons for investment choice:

Option 1:

- Very few customers chose this option as most were put off at the reference to high future costs
- **Bills before spills:** more likely to say that they cannot afford to see increases to their bills and believe that it is an expected service so do not want to pay for it

Option 2:

- Option 2 was often chosen as a more pragmatic approach to investment, as such, stable costs were more likely to be chosen than risk of major failures
- Some customers were concerned by the potential disruption to roads that large new asset replacement programmes might result from Option 3
- **Willing but inactive:** The slow increase to bill cost balanced against reduced chances of failure felt the right level of overall investment

Option 3:

- Some customers were aware how old some of the system pipes were and felt that this had the potential to help with other ambitions too (ie, water quality, lead pipe removal, leaks) therefore was important to invest in
- Also driven by the desire to reduce the number of times roads are dug up which would reduce the impact on their life (ie, less delays getting to work due to traffic jams) and keep costs down



Maintaining Pipes/Pumps: In their words



I'd like to think that United Utilities could afford to sort their major fixes now anyway. They need to give us some sort of price guarantee.

General Public, Under 40, Inner City

I don't necessarily believe that there will be major failures and I think that United Utilities should be on top of this as we pay enough money as it is!

Vulnerable Customer, Over 40, Lancashire

This is something that has to be done, otherwise the whole system will come to a standstill.

NHH, Low-Medium Water Usage, Lancashire

Definitely Option 3 [Significant investment] as I see the importance in it, and it says reducing risk of major failures in the future. We've had a few problems in Crosby, where water's been off, there's been leaking. That alone tells me things need to be improved.

General Public, Under 40, Merseyside, Rural

Option 2 as there's loads of pipe work getting done around me and you notice it a lot. I think option 3 would cause too much disruption.

Future Bill Payer, 23-29, Merseyside, Suburban

Water Usage: Leaks

A priority ambition, with the current reactive approach to managing leaks seen as inefficient and costly

Overall reactions:

- Seen as an important ambition due to the waste and disruption caused by leaks and the impact it can have on their lives
- Some were keen to minimise the disruption to roads and the impact on residents whilst 'digging them up' due to a reactive approach to leaks
- When prompted, customers were shocked to learn how much water is lost in the North West on a daily basis (166 olympic sized swimming pools)

Audience differences:

- **Rural:** More likely to not regard this as a priority, potentially as they are less impacted by major road works caused by leaks
- **Inner city:** More likely to have seen leaks near to where they live and have been impacted by road works



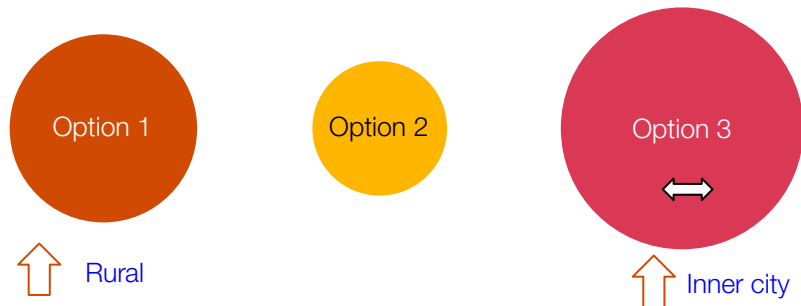
Water Usage: Leaks Ambition

- Proactively identify and reduce leaks through the use of technology and enhanced monitoring of the network



Water Usage: Leaks

An important ambition, but investment choices varied based on personal framing of the investment options



note: size of bubble indicates number of responses

| Water Usage: Leaks | | |
|-------------------------------|-------------------------------|-------------------------------|
| Option 1 | Option 2 | Option 3 |
| Reduce leakage by 50% by 2050 | Reduce leakage by 55% by 2050 | Reduce leakage by 60% by 2050 |
| ££ | £££ | ££££ |

Moderate allocated spend

High allocated spend

Reasons for investment choice:

Option 1:

- Many thought it was important but didn't think the difference between 50% and 60% leakage was a big enough difference to justify the price increase
- **Rural:** More likely to pick option 1, perhaps due to a lack of familiarity of the disruption caused by leaks on road networks

Option 2:

- Little interest in option 2 - reason chosen being sufficient investment or a struggle to visualise the 5% increase

Option 3:

- Customers thought about the volume of water that would be saved and understood the significant difference that 10% would make
- Seen as an important priority and an easier way to save water (ie, rather than focusing on customer water usage)
- **Inner City:** For some, this was due to personal experiences of being impacted by road works in city centres caused by leaks



Water Usage - Leaks: In their words



I'll go for option 3 for this one because I think everybody's getting sick of the amount of times the roads are being dug up for repairing water bursts, and it's leaving the roads in an absolute disgrace. The sooner they can actually fix that for the long term the better.

Vulnerable Customer, Over 40, Greater Manchester, Rural

I'd like to see an even more aggressive target. I think 60% is quite soft. I think that they [United Utilities] need to be more proactive and incentivise all of their customers to report leaks.

General Public, Over 40, Lancashire, Inner City

Option 1 as a 10% difference [compared to Option 3], for a lot more money isn't worth it.

NHH, Low-Medium Water Usage, Merseyside

I don't mind paying £5 more if they said that they would fix 60% of leaks. But is this money actually going to pay for leaks or is it going to the CEO's wages?

NHH, Medium-High Water Usage, Cumbria

Water Usage: Consumption

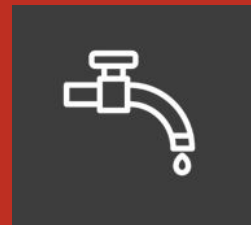
For some, education was at the heart of changing behaviours, whilst for others it was a waste of money

Overall reactions:

- Majority of customers felt that this ambition had lower importance in comparison to other, crucial services e.g. drinking water quality, maintaining pipes and pumps
- Some could see the value in educating customers on their water consumption, especially those that could recall previous water education campaigns (ie, turn off tap whilst brushing teeth)
- However, others regarded education campaigns as a waste of money (ie, already know it, unable to control others behaviours, want to be able to use what they want)

Audience differences:

- **Begrudging deflectors:** Saw the impact of education campaigns as unmeasurable, or resented being told how they should use their water
- **Over 40:** More likely to watch linear (live) TV and listen to the radio overall, so have more chance to encounter United Utilities advertisements, as well as remembering the effects of previous educational campaigns e.g. turning tap off when brushing teeth



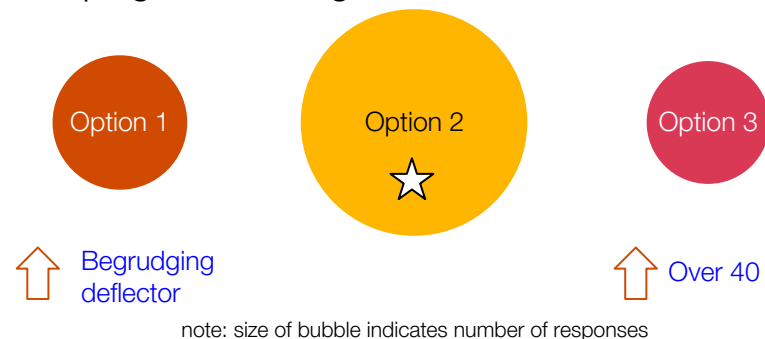
Water Usage: Consumption Ambition

- Help educate customers on how to increase efficiency of their water usage



Water Usage: Consumption

Awareness/engagement with previous educational campaigns encouraged desire for investment



| Water Usage: Consumption | | |
|--|--|---|
| Option 1 | Option 2 | Option 3 |
| Reduce customer consumption by 20% from today by 2050 (110 litres per person per day) | Reduce customer consumption by 20% from today by 2037 (110 litres per person per day) | Reduce customer consumption by 40% from today by 2050 (85 litres per person per day) |
| £ | ££ | ££££ |

Moderate allocated spend

High allocated spend

Reasons for investment choice:

Option 1:

- Customers often saw the ambition as a waste of money as they failed to understand the impact that education could have on consumption
- **Begrudging Deflectors:** Not only was this seen as being a waste of money, some customers didn't want to be told how much water they could use and stated that they would want an incentive for decreasing their consumption

Option 2:

- Appealed to most customers. Despite having the same reduction as option 1 (20%), the earlier target of 2037, sounded more appealing to customers as it seemed more ambitious but still achievable
- For those that are environmentally conscious, it felt important to get consumption down as early as possible, in light of the future scenarios in particular

Option 3:

- Some customers mentioned seeing United Utilities adverts on TV such as their 'leaky loo' campaign and felt like similar educational campaigns would be beneficial for younger generations. This was especially effective for customers with young children
- **Over 40:** Recognised the impact that previous water education has had (ie, turning off tap whilst brushing teeth) so would want to see that continued for future generations



Water usage - Consumption: In their words



If it's £5 more a year on your bill but it's going to investment in better appliances and education for people to help themselves [to reduce their water consumption] then I'm all for it. Absolutely. We have to drag ourselves into being more environmentally friendly.

General Public, Under 40, Lancashire, Rural

Option two and purely because the date is sooner. I don't want to pay more money about educating people who do not want to be educated.

General Public, Over 40, Cheshire, Suburban

When it comes to consumption reduction, I think everyone's got a little bit of responsibility to at least meet each other on a middle ground.

Vulnerable Customer, Over 40, Greater Manchester, Inner City

I think making people aware of how efficient they can be and what they're actually doing with water is something I think is great. I think the UK as a whole can benefit from this.

Future Bill Payers, 18-22, Merseyside, Suburban

They do a really good advertising campaign with a little kid who comes on the TV and radio talking about leaky loos'

General Public, Over 40, Lancashire, Inner City

Sewer Flooding

Level of importance is significantly related to direct or indirect experience with the impact of sewer flooding

Overall reactions:

- Highly important for customers that have had direct or indirect (friends / family) experience with sewer flooding and are keen to prevent it from happening to anyone else
- For others that haven't experienced sewer flooding, there was often limited empathy for residents in sewer flooding areas and limited awareness of the impacts of sewer flooding (eg, time and cost to repair homes)
- Seen as important but not as high a priority as water quality and maintenance, for those who have not experienced it
- It was seen that focusing on other priorities (water usage, maintenance) would also help to prevent sewer flooding

Audience differences:

- **NHH:** This ambition particularly resonated as they considered the impact that sewer flooding would have on their business (eg, potential lost stock, time taken to clean warehouse facilities)

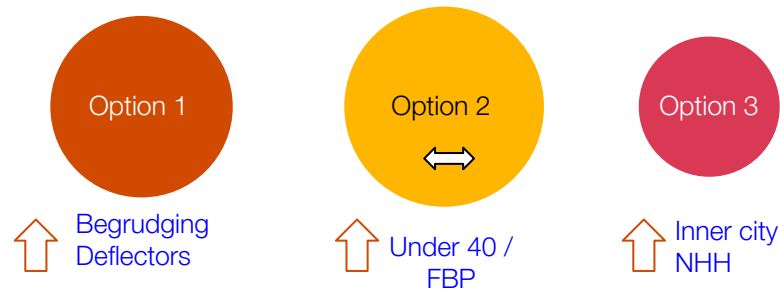


Sewer Flooding: Ambition

- Use technology to proactively identify issues such as blockages and rising water to prevent flooding before it happens
- Increase the capacity of sewer network
 - Managing rainwater to prevent it from entering the sewers (e.g. through sustainable drainage systems)

Sewer Flooding

Overall, a fairly even distribution of investment options, with empathy and experience largely driving choices



note: size of bubble indicates number of responses

| Sewer Flooding | | |
|--|--|--|
| Option 1 | Option 2 | Option 3 |
| Customers risk experiencing sewer flooding occurring once every 30 years | Customers risk experiencing sewer flooding occurring once every 40 years | Customers risk experiencing sewer flooding occurring once every 50 years |
| No increase | ££ | £££ |



Reasons for investment choice:

Option 1:

- Customers that had not experienced the impact of sewer flooding (either directly or indirectly) and had little understanding of the impact sewer flooding has (ie, takes months to repair/clean home, huge costs) felt this was less of a priority
- **Begrudging deflectors:** Felt this core service should be covered by United Utilities and not paid for by customers

Option 2:

- Represents a middle ground for some customers. The risk of it occurring once every 40 years was regarded as a 'once in a lifetime' timeframe; therefore little reason to invest any more, particularly as the risk of it happening once in their lifetime was still there with option 3
- **Under 40/FBP:** More likely to pick, perhaps due to limited awareness of the effects of sewer flooding

Option 3:

- More likely to have had direct / indirect experience of sewer flooding or strongly empathise with those that could/have experienced it
- **Inner city:** More likely to want increased investment, perhaps due to feelings that urban environments may be impacted more
- **NHH:** A priority due to the impact it could have on a business (ie, revenue, lost stock)



Sewer Flooding: In their words



Maintenance wise, they need to do it ASAP. Because it's not just cleaning up the waste, it's the decontamination afterwards. It could affect the stock in our warehouse.

**NHH, Medium-High Water Usage,
Merseyside**

Option 3 because my family experienced it 10 years ago. I feel like you have to experience it to want to invest in it. I wouldn't wish it on my worst enemy as it costs a lot to fix and takes months to sort.

**Future Bill Payers, 23-29, Cheshire,
Rural**

I'd be happy to go to the top with this because where I live we've had sewer flooding quite bad. I've had this outside my front door, and had to wade through it to get in.

**Vulnerable Customer, Over 40,
Cheshire, Inner City**

Why are we paying for people being stupid throwing wet wipes down the toilet?

**General Public, Under 40,
Lancashire, Suburban**

If I'd have experienced it I'd maybe be option 3 but I haven't so I'll go for option 1.

**General Public, Under 40,
Merseyside, Inner City**

I've never really suffered with flooding myself and it's something I find difficult to relate to.

**Future Bill Payers, 18-22,
Greater Manchester, Suburban**

Social Values: Jobs/Support

Seen as a worthwhile initiative, with support and an increase in job opportunities welcomed

Overall reactions:

- Customers had the current cost of living crisis at the forefront of their minds, as such, most thought that it was important to support vulnerable customers that were struggling with their finances
- Providing jobs in the North West was positively viewed as it was seen to be important to invest in the North West
- Some were hopeful that this would provide more job prospects for future generations too

Audience differences:

- **Over 40s:** Are more open to greater support being provided to vulnerable customers as they want to protect their children/grandchildren if they are currently/should they require financial support
- **Vulnerable customers/low income:** More likely to welcome the idea of supporting customers, especially as they may qualify for the support now / in the future



Social Values, Jobs/Support: Ambition

Make the North West fairer and stronger:

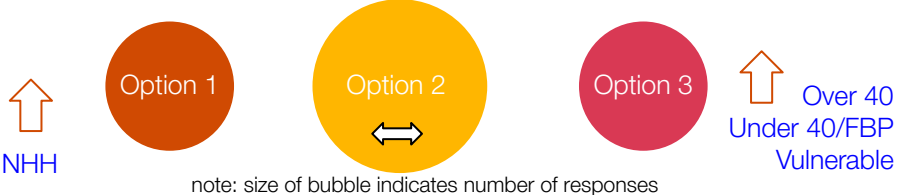
- Support vulnerable customers in paying their bills
- Provide more jobs, upskilling and training opportunities across the North West



Medium Priority

Social Values: Jobs/Support

A 'nice' ambition, but opinions are split on who should be responsible for paying for this investment



| Social Values: Jobs/Support | | |
|--|--|--|
| Option 1 | Option 2 | Option 3 |
| <p>We currently support 200,000 customers who struggle to pay their bills through our affordability schemes</p> <p>United Utilities is a reliable employer supporting jobs across the North West</p> | <p>We continue to offer support for customers through working with more partners (e.g. social housing providers) to extend affordability schemes, reducing the number of customers who are in water poverty</p> <p>United Utilities continues to generate significant employment opportunities for North West residents and is a considered a top employer</p> | <p>Incorporating all the actions in option 1 and 2, United Utilities also support the wider North West economy through investment in innovative technology, affordability and infrastructure</p> |
| No Increase | £££ | ££££ |

Moderate allocated spend High allocated spend

PwC | Confidential information for the sole benefit and **↔ = Most popular choice overall (split consensus)**

Reasons for investment choice:

Option 1:

- Some customers could see that it's important to support other people as a priority, particularly during a financial crisis. However, they also felt other areas were more of a priority for deeper investment, particularly when considering longer term issues, as opposed to more immediate solutions
- For others, it was difficult to comprehend why they should be responsible for helping other customers pay their bills and thought it was something United Utilities should be funding.
- A minority were concerned that some 'vulnerable' customers may exploit the system (ie, are these customers facing financial difficulties or are they 'playing the system'?)
- **NHH:** Felt that this wasn't something that United Utilities should be passing onto the customers, it is something that they need to take responsibility for and that it was solely a business expense

Option 2:

- Most popular opinion, given the increasing pressure from the cost of living crisis. Customers, who are able to offer financial support to those 'vulnerable' felt that it was important to do so and are happy to pay that added cost to those who need it

Option 3:

- **Vulnerable Customers/low income:** More likely to choose as they felt that they could, one day, be in need of support
- **Over 40:** Greater concern, this is something their children /grandchildren may need one day. They want to make sure that there is as much support as possible, should they need it
- **Under 40/FBP:** Relate to the idea of protecting future job prospects and supporting the economy



Social Values - Jobs/Support: In their words



Because it's important to support vulnerable customers. I'm in a position where I can afford a bit more so I think it's important to help those get clean water.
General Public, Under 40, Merseyside, Inner City

My priority is vulnerable customers and helping them manage their day to day costs.
General Public, Over 40, Merseyside, Inner City

Supporting vulnerable customers should be coming out of their profits.
NHH, Low-Medium Water Usage, Greater Manchester

We're paying for a service so why do we need to pay for other people. It kind of feels like guilt tripping to me.
Future Bill Payers, Under 40, Cheshire, Rural

Carbon Net Zero

Most appreciate the importance of the ambition, but struggle to understand why they must bear the cost

Overall reactions:

- Most customers appreciate the importance of achieving this ambition, especially with how prevalent climate change has been in the last 25 years
- Customers do acknowledge that achieving net zero is something that is really important, which is brought to life by the climate inaction/chaos future. To avoid this happening, action needs to be taken sooner rather than later
- However, customers struggle to understand why this is something that they need to help United Utilities to achieve
- The initiatives (electric vehicles, less carbon emission tech, planting more trees) also felt a little intangible to customers and hard to measure the impact of
- Given that the U.K. government has set out plans to become carbon neutral by 2050, it is seen as United Utilities responsibility, not the individual customer

Audience differences:

- **Change champions** - Place greater emphasis on reaching net zero, as carbon net zero is important to them
- **Bills before spills, begrudging deflectors** - less future focused, not tangible enough of a benefit for them



Carbon Net Zero: Ambition

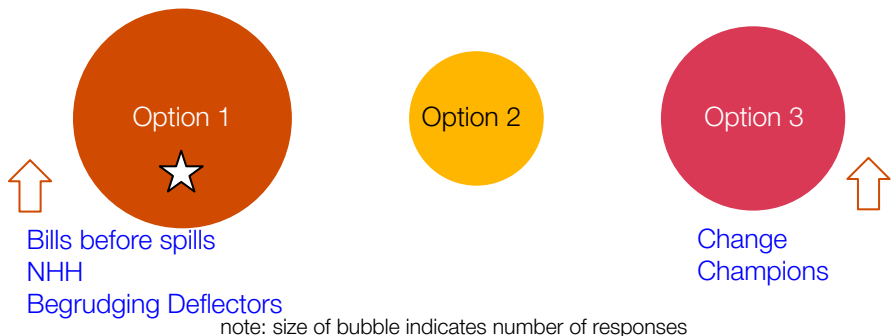
Reach Carbon Net Zero by:

- Switching transport fuels to electric vehicles
- Investing in technologies which emit less carbon (reducing carbon from United Utilities operation)
- Planting more trees to absorb carbon from the atmosphere (offsetting construction activity)

Lower Priority

Carbon Net Zero

Customers are aware of its importance, they just don't want to pay for it



| Carbon Net Zero | | |
|--|--|--|
| Option 1 | Option 2 | Option 3 |
| United Utilities to reach net zero by 2050 | United Utilities to reach net zero by 2045 | United Utilities to reach net zero by 2040 |
| £££ | ££££ | £££££ |

Moderate allocated spend

Very high allocated spend

Reasons for investment choice:

Option 1:

- The most popular choice, with most appreciating the importance of achieving the ambition, but a range of factors were driving their lower investment choice:
- **Bills before spills:** Given the increased financial pressures during the cost of living crisis, they were unwilling to pay even more for something which they don't think they will get a direct benefit from
- **NHH:** They can see why United Utilities are pushing for net zero, however, this is a cost that United Utilities should take responsibility for, not the customer
- **Begrudging Deflectors:** Some customers don't see the impact of climate change, thus don't see it as an ambition United Utilities should push for
- Other customers are happy with United Utilities to follow the government recommendation of 2050

Option 2:

- Option 2 is often selected as it is closer to achieving net zero than Option 1, but is not as expensive as Option 3

Option 3:

- **Change Champions:** Can see the importance of achieving carbon net zero and are doing their bit to make this happen. They want to see this ambition achieved as soon as possible and are happy to pay more



Carbon Net Zero: In their words



Option 3 because we're running out of time to reverse any damage that we've done so we need to crack on really.

Future Bill Payers, Under 40, Greater Manchester, Suburban

I'd be happy to pay more. However, I don't think we should be paying more as a consumer so that a company can reach it faster.

Future Bill Payers, Under 40, Greater Manchester, Suburban

This is a business expense for them (United Utilities) and they should have to build it into their business model. We

shouldn't have to pay for it.
NHH, Low-Medium Water Usage, Cumbria

They have a responsibility as an industry. This shouldn't be an ambition, just get on and do it.
General Public, Over 40, Merseyside, Inner City

I would definitely give £5 if that's what they said it was going to do. I can't understand why anybody would not do it.

Vulnerable Customer, Over 40, Lancashire, Suburban

Social Values: Green Space

A 'nice to have' ambition but customers struggle to see the urgency of this ambition for future investment

Overall reactions:

- Struggled to see why this ambition needed investment when there are other areas that United Utilities should focus their investment on
- Some felt that green space should be free for customers to access and didn't understand of why money was required to maintain land
- A minority of customers could see the value of investing in green space - it was seen as a 'nice to have' and something everyone could take advantage of. The pandemic had emphasised the need for green space to help improve health and wellbeing

Audience differences:

- **Begrudging Deflectors / Rural:** Struggled to see the value in this compared to other ambitions. Would rather see the investment spent elsewhere. Hard to convince them that this was something pressing, especially if they already had access to ample green space or, conversely, didn't use much/any green space



Social Values, Green Space: Ambition

Make the North West greener and healthier:

- Give local customers access to recreational green space e.g. creating water sports and recreational clubs, opening up sites for activities like paddle boarding



Lower Priority

Social Values: Green Space

Not a priority ambition for most, with a clear preference for investment to be focused elsewhere



Begrudging Deflector Rural



note: size of bubble indicates number of responses

| Social Values: Green Space | | |
|--|---|--|
| Option 1 | Option 2 | Option 3 |
| 65 reservoirs currently have recreational clubs (e.g. sailing). Most of our catchment land across the North West provides open access to green space. We continue to offer this visitor experience | We go above to provide more facilities and opportunity for different types of water and land based activities for customers, and work to further improve accessibility to and on our land | Building on options 2 and 3 we also invest in working across communities and with other authorities and organisations to promote access to United Utilities catchment land (e.g. promoting walking trails and offering activities to a diverse range of customers) |
| £ | £££ | £££ |

Moderate allocated spend

PwC | Confidential information for the sole benefit and



= Most popular choice overall (strong consensus)

Reasons for investment choice:

Option 1:

- By far the most popular investment option, with drivers differing based on the customer's lifestyle
- Those who use outdoor spaces feel that they already have access to enough green space therefore did not see the need for any further investment
- Those who don't use outdoor spaces didn't see it as a priority compared to other ambitions and were not willing to pay for a service they wouldn't use
- **Rural:** Tend to have much more green space in their local area, therefore, it is hard for them to understand why they need to pay more, given how much green space they have access to already
- **Begrudging Deflector:** Struggle to see the value of this ambition, given the level of importance and need other ambitions have for investment

Option 2:

- Realise the importance of green space, especially after the pandemic and saw the benefit of investing in this ambition
- Struggled to understand the change from Option 2 to Option 3, even though it is the same increase in annual bills for customers

Option 3:

- Appreciate the importance of green space and giving customers access to it



Social Values - Green Space: In their words



I feel like I've got this at the moment and I feel like the money could be spent better elsewhere.

General Public, Under 40, Merseyside, Inner City

It's a lovely thing to have, but it's definitely not a need.

Future Bill Payers, Under 40, Greater Manchester, Suburban

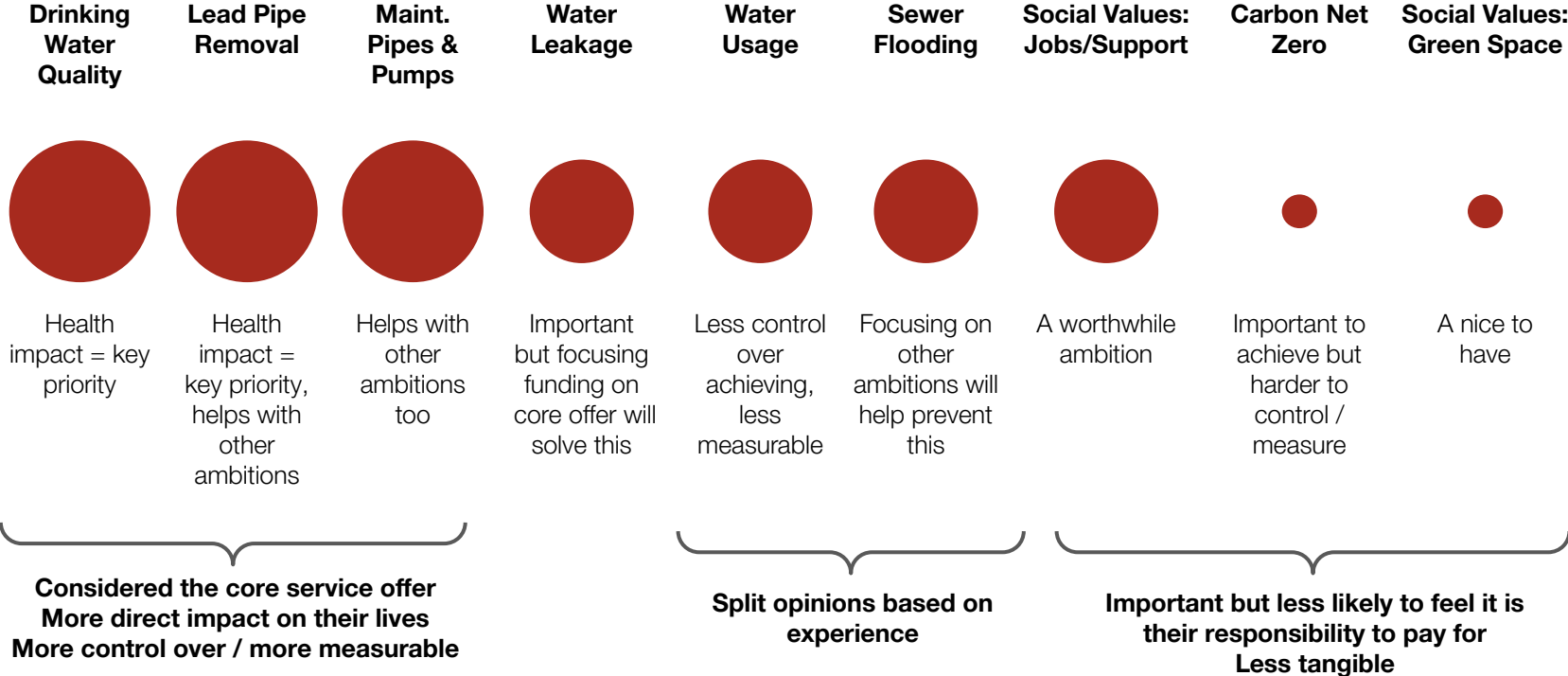
I do walk and do like walking. I walk around quite a few of the reservoirs and the land there. So, you know, that fits with my lifestyle well.

Vulnerable Customer, Over 40, Cheshire, Rural

Option 3 because I've always enjoyed being out and about in nice recreational spaces.

Future Bill Payers, Under 40, Greater Manchester, Suburban

After a detailed review, customers prioritised ambitions considered to be ‘core services’ and with a more measurable impact



note: size of bubble indicates priority of ambition and investment

Reflective interviews gave customers chance to share how views and behaviour had changed

Priority ambitions

- **Maintaining pipes and pumps and drinking water quality were reinforced**, as customers viewed these as the foundational ambitions and would influence the success of other ambitions

Changes in their own views/behaviours

- Overall, there **weren't large changes in customer attitudes towards priority ambitions**, having had time to reflect
- However they **felt more conscious about their own water usage**
- After speaking to family/friends, they were **more mindful of other people's opinions** ie intergenerational fairness - and more focused on helping their family

Impact of future scenarios

- Indications that customers were **more mindful about the impact their water usage/behaviour** can have on water reserves and on the wider environment
- Customers had **reflected further on the importance of water quality**, as customers don't want a future reliant on bottled water

NB: All those that took part in the follow up interviews confirmed that they understood the stimulus materials shown during the research sessions

““”

Having had time to reflect on their responses from the initial research session, some felt differently about certain ambitions

“I chose option 1 for carbon net zero and I feel that gives a very wrong impression of me. I do think it's possible to reduce carbon footprint and the quicker, the better. So I'll probably change my choice to option 3 for that.”

General Public, Under 40, Cheshire, Suburban

“I've thought a little bit more about the carbon net zero and about reducing water usage. I'd like to learn a little bit more about how water comes under net zero.”

Vulnerable Customer, Over 40, Greater Manchester, Inner City

Customers also mentioned how the sessions had positively impacted their thoughts and behaviours at home...

“Since I was a child I used to be the person that used to keep the tap running. Now I don't keep the tap on. I think if anything, it's made me realise how much [water] I'm actually using.”

Future Bill Payer, 23-29, Cheshire, Rural

“I learned more about water than I've ever learned before [in the focus group]. I'd like to see a breakdown of my bill that explains how much of your bill has gone into these [ambitions].”

General Public, Over 40, Merseyside, Inner City

Impact of the research on behaviours...



I'm planning on getting a new bathroom in the next 12 months or so. And I'm actually questioning now, 'Do I really need a bath?' So yeah, it's making me think about that.

General Public, Over 40, Merseyside, Suburban

It's definitely made me more mindful and think about what I can do to reduce my water consumption and, hopefully, if other people can think like that then it helps towards our future.

General Public, Under 40, Cheshire, Inner City

It's definitely made me think about my behaviour - little things like having less baths, changing the washing cycle, not filling the kettle to the top for one cup of tea.

General Public, Under 40, Cumbria, Suburban

It's (the research) made me think more, like turning the tap off, not keeping things turned on, I'm trying to do my bit more.

General Public, Over 40, Lancashire, Suburban

I can't believe that flushing the toilet uses that much! It makes you think! Now I know why my Mum says 'Don't flush'.

General Public, Under 40, Merseyside, Inner City

Intergenerational fairness

Multiple touch points were used to gain reactions towards the intergenerational fairness question

Stimulus used to explore intergenerational fairness...



How do we pay for investments?

We need to think about the balance of responsibility amongst current and future customers for paying for investments:

How could we pay for this?

- **Option 1:** Make additional investments to 'future proof' now so that fewer problems arise in the future. An increase in bills would start sooner, spreading increases across different generations of bill payers
- **Option 2:** Invest less in 'future proofing' now and tackle any future issues as and when they arise. The increase in bills would start much later (ie, years down the line) and would cost more to fix

Follow up task: How we pay for investments

| | Ambition | Option 1 | Option 2 |
|--|---------------------------------------|--------------------------|--------------------------|
|  | Maintaining Pipes and Pumps | <input type="checkbox"/> | <input type="checkbox"/> |
|  | Water quality: Drinking Water Quality | <input type="checkbox"/> | <input type="checkbox"/> |

Multiple touch points used:

1

Probed at different points in the main research sessions to capture more nuanced and considered views

2

Probed in the main sessions to gain overall reactions to the intergenerational issue, as well as reactions towards specific ambitions

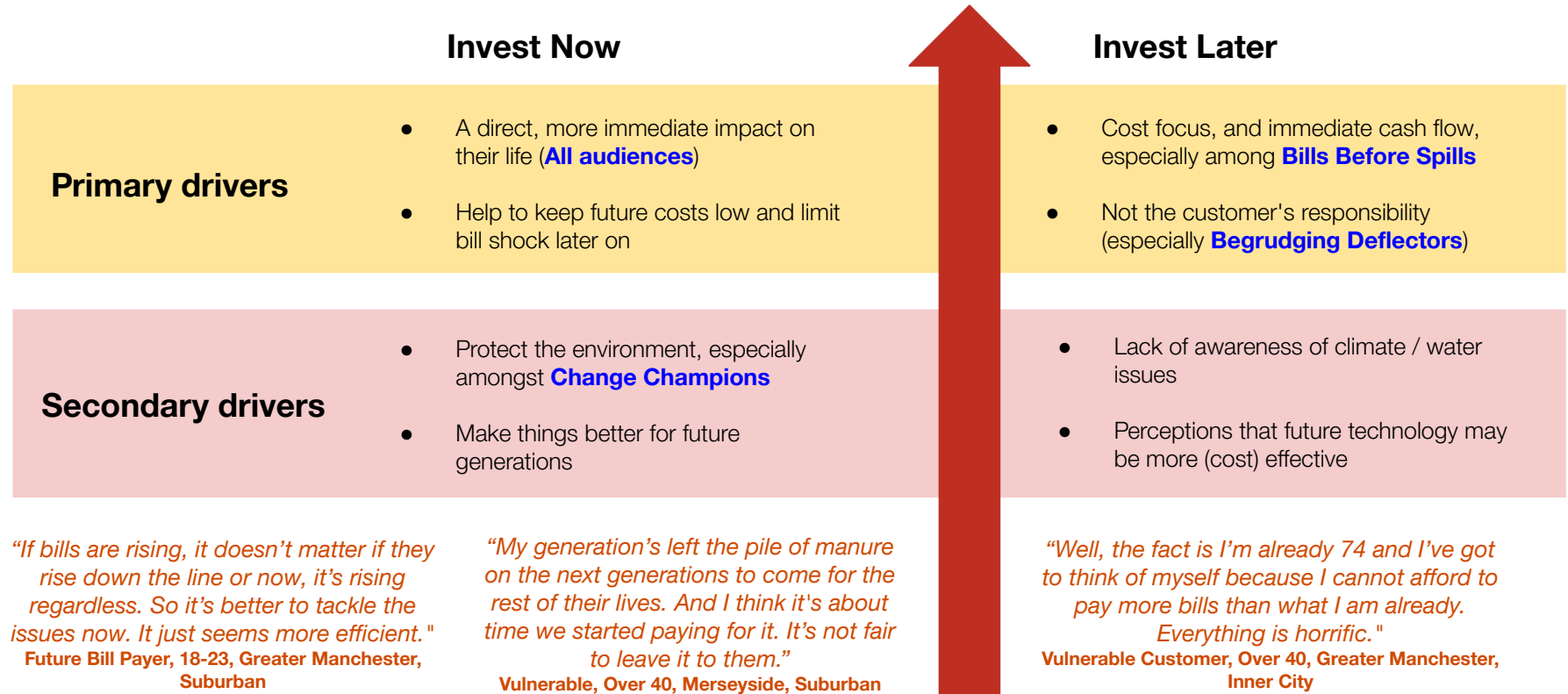
3

Follow up stage, to gain more considered, nuanced views once respondents have had time to reflect on the intergenerational issue (See slide 12 for more information)

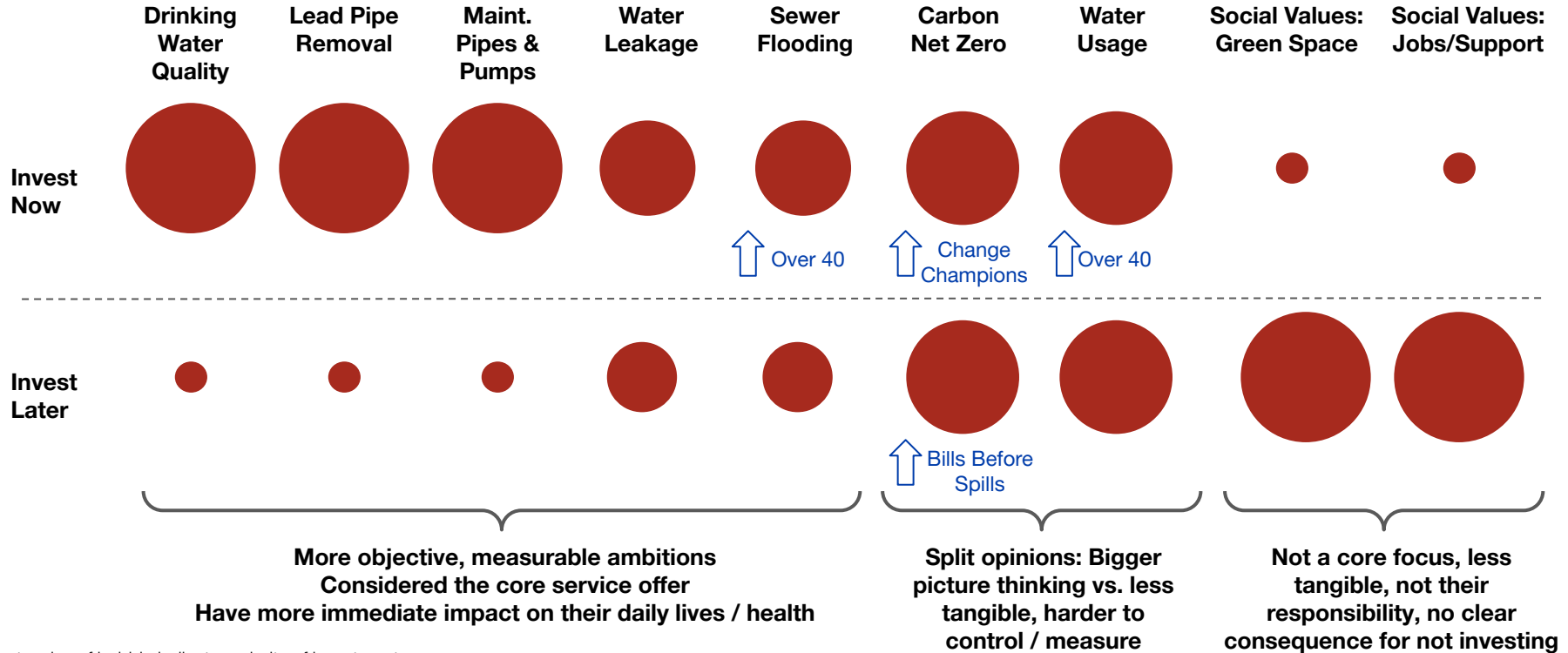
4

Follow up stage, for respondents to open up the discussion to a wider intergenerational audience by asking different aged friends / family members about the issue and report back

The vast majority were uncomfortable with the idea of not taking action and not investing now in the ambitions



Customers want to see more urgent investment in ‘core services’ that have more immediate impact on lives/health



note: size of bubble indicates priority of investment

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Speaking to different generations produced nuanced discussions on intergenerational fairness

Intergenerational fairness

- Low income and less environmentally conscious customers and their friends / family were more likely to push things down the road and focus on 'core needs', e.g. water quality
- Those who selected 'invest now' for an ambition felt that they needed immediate action, whereas 'invest later' are focused on fundamental service ambitions providing a more tangible benefit to them
- Split across some ambitions, such Carbon Net Zero and Water Usage: Consumption due to different views on the immediacy and importance

Invest now

- Customers would often select the ambitions they felt were more measurable and ones that United Utilities could achieve
- Those who selected 'invest now' for Social Values: Jobs/Support were more supportive of increased job opportunities and investment in the North West

Invest later

- Ambitions considered harder to achieve, such as Water Usage: Consumption, as they heavily relied on customers changing behaviours
- Ambitions they didn't see as their responsibility and felt they should not be responsible for e.g. Carbon Net Zero, Social Values

“”

Some customers were surprised that older generations of their family chose to invest now rather than later...

"I was wondering with my Grandma if she would have a different opinion being significantly older, but actually she also said it's better to pay more now rather than leave it till later."

General Public, Under 40, Cheshire, Suburban

"My Dad took more of an avid interest in the environmental side, which kind of surprised me, because I expected [net zero] to be targeted towards my generation and opposed to the elder generation."

Future Bill Payer, 18-22, Greater Manchester, Suburban

Customers who were struggling financially or some older generations were more reluctant to invest now...

"[My friend] lives with a disability and has taken early retirement. She's on a limited budget, having finished work, so didn't want to spend as much now."

General Public, Over 40, Greater Manchester, Inner City

"It was all down to budget and the fact that she's not going to live to see any of the benefits. It's the old age argument "[I've] paid all [my] life so why should [I] pay now?"

Vulnerable Customer, Over 40, Merseyside, Suburban

When areas for debate arose, some customers managed to get others to see from their own perspective...

"My Dad would prefer to see quick fixes, where I was explaining quick fixes are the problems that lead to longer term problems and debt. When I explained that I think he opened up to the idea."

Future Bill Payer, 23-29, Cheshire, Rural

Conclusions

Conclusions: Key headlines

1 Customers' initial reactions towards ambitions largely influenced by their understanding and expectations of United Utilities' key roles and responsibilities

Drinking water quality and maintenance roles were felt to be key priority areas for future ambitions, with views remaining fairly consistent throughout the research discussions and following a period of reflection.

2 Four customer personas emerged based on levels of awareness and engagement in issues around water consumption, wastewater and the environment, cost saving behaviours and level of action and personal responsibility.

Overall, these four personas strongly influenced customers' reactions to the ambitions and their priorities on where and how investment should be allocated (ie, option 1, 2 or 3).

3 Customers prioritised investment on ambitions that had more of a direct impact on their daily lives, health and/or wellbeing

Core services were considered as drinking water quality, maintaining the network and lead pipe removal, as well as supporting vulnerable customers with their bills (front of mind due to cost of living crisis). These felt more achievable, where success could be easily measured and United Utilities held accountable for progress, as well as helping to reduce investment needed for other ambitions (ie water leakage, sewer flooding)

4 Reactions to ambitions were strongly influenced by customers direct/indirect experience

Customers experience of sewer flooding or water restrictions, or recall of the positive influence of water education campaigns, increased the importance of the respective ambitions. Ambitions considered to be 'big picture' ie carbon net zero, green spaces, were considered a 'nice to have' particularly in context of cost of living crisis, with limited consequences for delaying investment. Additionally, investment in these ambitions was seen as United Utilities responsibility, not the customers.

Conclusions: Key headlines

5 Future scenarios brought into sharper focus carbon net zero, sewer flooding and water usage ambitions, highlighting the potential impact of not investing in these ambitions and/or customers not changing behaviour

The AI generated visuals helped customers immerse themselves in the potential future challenges and what the long term priorities and focus for investment should be. They highlighted the importance of educating the public on water-issues to encourage positive behaviour change.

6 Intergenerational fairness: Vast majority of customers uncomfortable with not taking action now and delaying investment in the ambitions, despite the cost of living crisis

Particularly when investment is positioned as a minimal increase in cost on annual bills, and impact on delay could be far more disruptive and costly. Ambitions part of core service offer i.e. more measurable and more immediate impact on daily health and/or wellbeing were a priority of investment now (e.g. lead pipe removal) but less tangible ambitions (harder to measure/control) were more likely to be deprioritized

7 After a period of reflection, customers reported heightened mindfulness of their water usage and its environmental impact

When customers discussed the ambitions/research with different generations of friends and family, opinions on their ambitions remained fairly consistent. However, hearing additional views made customers slightly more mindful of their financial responsibilities, intergenerational fairness and the need to act now. Views of friends/family were largely consistent with participant views.

Appendix

Detailed sample composition

| Demographics | Audience | Location | | | | | Total |
|--------------|---------------|----------|------------|--------------------|------------|----------|-------|
| | | Cumbria | Merseyside | Greater Manchester | Lancashire | Cheshire | |
| SEG | ABC1 | 1 | 12 | 13 | 7 | 8 | 41 |
| | C2DE | 4 | 9 | 4 | 4 | 2 | 23 |
| Gender | Male | 1 | 10 | 8 | 5 | 7 | 31 |
| | Female | 4 | 11 | 9 | 6 | 3 | 33 |
| Location | Inner city | | 5 | 7 | 2 | 1 | 15 |
| | Suburban | 3 | 13 | 9 | 7 | 3 | 35 |
| | Rural | 2 | 3 | 1 | 2 | 6 | 14 |
| Age | FBB (18-22) | | 1 | 2 | 1 | | 4 |
| | FBB (23-29) | | 2 | 2 | | 1 | 5 |
| | Under 40 | 2 | 11 | 4 | 4 | 4 | 25 |
| | Over 40 | 3 | 7 | 9 | 6 | 5 | 30 |
| Ethnicity | White British | 5 | 16 | 11 | 7 | 8 | 47 |
| | British Asian | | 1 | 3 | 3 | 2 | 9 |
| | Black British | | 2 | 2 | 1 | | 5 |
| | Other | | 2 | 1 | | | 3 |
| Water meter | Metered | 3 | 10 | 11 | 4 | 4 | 32 |
| | Unmetered | 1 | 10 | 5 | 6 | 6 | 28 |
| | Don't know | 1 | | | | | 1 |

Participant pre-engagement sample composition

| Engagement area | Audience | Location | | | | | Total* |
|-----------------------|-----------|----------|------------|--------------------|------------|----------|--------|
| | | Cumbria | Merseyside | Greater Manchester | Lancashire | Cheshire | |
| Environmental issues | Engaged | 1 | 8 | 4 | 4 | 6 | 23 |
| | Unengaged | 4 | 13 | 13 | 7 | 4 | 41 |
| Water bill statements | Engaged | 3 | 13 | 4 | 4 | 5 | 29 |
| | Unengaged | 2 | 5 | 9 | 6 | 4 | 26 |
| United Utilities | Engaged | 1 | 5 | 4 | 4 | 4 | 18 |
| | Unengaged | 4 | 13 | 9 | 6 | 5 | 37 |

*Total responses may differ across engagement areas as some audiences did not provide an answer for each question i.e. future bill payers

Participant post-engagement sample composition

| Statement | Average score |
|---|---------------|
| I feel I understood the issue and the information presented to me | 9.1 |
| It is difficult for customers to give informed opinions on these issues | 3.0 |
| It is important that United Utilities ask customers views on these issues | 9.5 |
| It has been good taking part in this research and sharing my views on this topic | 9.8 |

NB. Average score is based on a scale of 1-10, with 1 being 'strongly disagree' and 10 being 'strongly agree'

Thank you



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