



# Customer Priorities

*A WaterTalk research report  
prepared for United Utilities*

*May 2020*

# Background and approach



# Research background and approach

In order to better understand which service areas should be prioritised to ensure the successful delivery of United Utilities' services now and in the future, research was required to understand how important customers perceive six aspects of service to be:

- Providing water that tastes and smells good, and is not discoloured
- Preventing homes and businesses from being affected by sewer flooding
- Preventing accidental pollution (e.g. sewage leaks) from United Utilities activities
- Reducing the level of leakage of water from United Utilities' pipe network
- Maintaining good and constant water pressure
- Reducing unplanned interruptions to supply of water e.g. burst pipes leading to no water

## What we did:



5-question online survey with 808 WaterTalk members



Fieldwork ran between 20th – 25th May 2020



Data resulted from natural fall out from the WaterTalk panel

**N.B** Full sample profile available in appendix [here](#)

# Summary of findings



# Summary



## Water that tastes and smells good, and is not discoloured, is the top priority for customers

For many, it's the bare minimum service level they expect to receive from UU, thereby emphasising its importance.

Health and safety concerns arise when customers think about 'dirty' water, particularly during the current pandemic.

Provision of clean water is also felt to be key for environmental efforts, by reducing reliance on bottled water.



## Customers' lowest priority is maintaining good and constant water pressure

While low water pressure is felt to be inconvenient, it's typically something that customers can cope with.

Other service areas are deemed more vital due to the consequences that can occur if something goes wrong.

A quarter of those ranking this aspect as a top two priority changed this to bottom two after being presented with the stats, mainly due to the low number of customers currently affected.



## Reducing leakage was most likely to be given higher priority after the stats were shown

One in five customers ranking it as a bottom two priority changed this to top two after they had read the stats.

The stats were surprising reading for many, who were unaware of how much water is lost each day due to leaks.

Customers also viewed the impact of leakage as a key issue to fix to help lower their bills as well as reduce maintenance costs borne by UU.

# Prioritisation of service areas

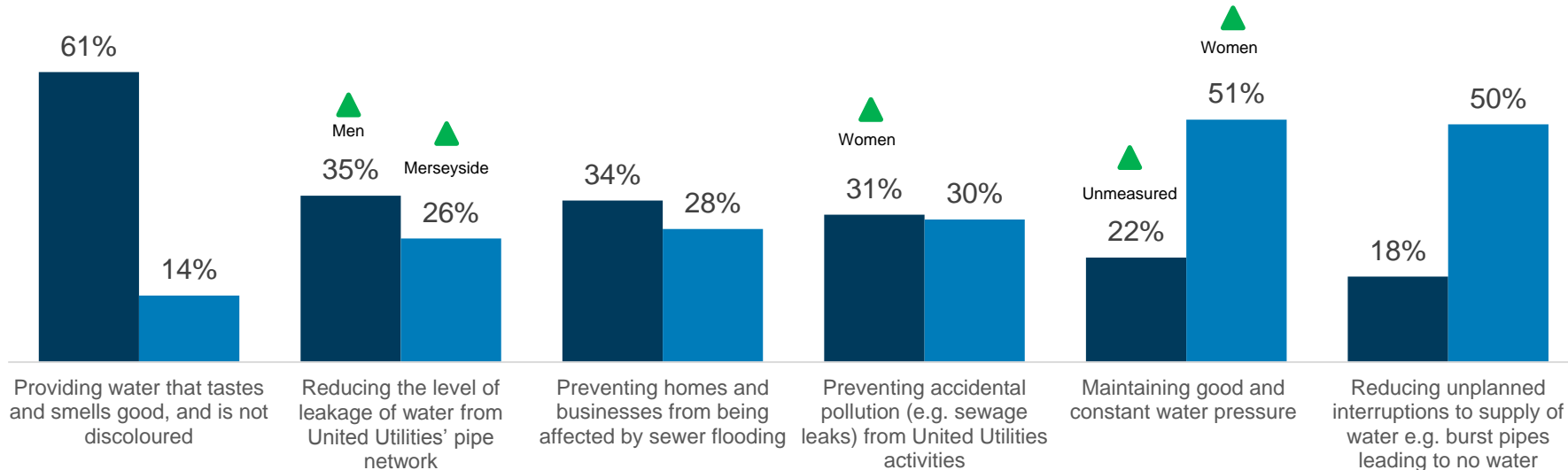


# The *provision of water that tastes and smells good* is by far the top priority and what customers feel UU need to guarantee

By contrast, customers feel *maintaining good water pressure* and *reducing unplanned interruptions* are the lowest priorities

Ranking of priorities (before seeing stats)

■ Ranked Top 2   ■ Ranked Bottom 2



Q1. When thinking about the water and sewerage services that United Utilities provides, how important is it that United Utilities prioritises the following areas for improvement to ensure they can deliver those services now and in the future?

Base: All respondents (n=808)

Source: Customer Priorities WaterTalk survey (May 2020)

▲ ▼ Triangle: Significant difference at 95% conf. level.





# ***Provision of water that tastes and smells good is customers' top priority as it's the minimum standard they expect to receive***

**They also see it as essential to health and safety, and for discouraging use of bottled water**



**46%** ranked *providing water that tastes and smells good, and is not discoloured* as the top priority

**“** | *I'm not really sure it requires explanation...it is the minimum I would expect*  
Male, 35-54

**“** | *That is the primary responsibility of the water company and ensures that people have access to clean healthy water resources*  
Male, 35-54

**“** | *That should be a core goal to increase water uptake from customers over bottled water*  
Male, 18-34

**“** | *This is fundamental to who and what you are and confidence in you as a provider. It is how you are judged every hour of everyday. Water quality is so important*  
Male, 55+

**“** | *Because we put it in our bodies, it should at the very least be clean and safe for us to drink*  
Female, 18-34

**“** | *People will drink it and not bottled water, therefore reducing plastic waste*  
Female, 35-54



# Customers ranking *provision of clean water* as lowest priority did so because they believe it will still be safe to consume



**6%** ranked *providing water that tastes and smells good, and is not discoloured* as the lowest priority

“

*It's still safe to drink and use so a little off colour or taste will not do you any harm*

*Male, 55+*

“

*Cosmetic so long as it is safe to drink that's okay*

*Female, 35-54*

“

*I have lived on a farm where well was the only supply. Sulphurous smell and taste were very evident, but did us no harm.*

*Male, unknown*

“

*Discolouration does not necessarily mean it's contaminated*

*Female, 55+*

“

*I realise that the way water looks and smells is important even if it is only cosmetic and is not affecting a person's health. But it can be just a cosmetic issue rather than something which will poison you*

*Female, 55+*

“

*Some discoloration is natural so that doesn't bother us. We can filter the water in our home.*

*Female, 18-34*

# The financial implications are key for customers who rank *reducing leakage* as their top priority

There's also a sense that leakage negates customer efforts to save water in the home



**17%** ranked *reducing the level of leakage from UU's pipe network* as the top priority

“ | *The waste is very costly. Water resources are limited. Its a waste of resources purifying water to let it leak back into the ground.*  
Male, 55+

“ | *Due to wastage. A lot of people have water meters now and try their best to save as much water as possible but this would be completely useless if there is leakage of water.*  
Female, 18-34

“ | *Because it would mean in the summer we wouldn't need a hosepipe ban as all of the water that falls in winter in Cumbria would be in the reservoirs and not wasted on its way to people's homes and businesses*  
Female, 35-54

“ | *It takes money and effort to get clean water, losing it in leaks is literally a waste of money*  
Female, 55+

“ | *Because it's a big problem, in droughts the public are asked not to waste water (not that they all take any notice) but UUs pipes continue to leak.* Female, 55+

“ | *Wasting water is a crime to the community and will result in rising costs*  
Female, 55+

# Reducing leakage is ranked lowest as customers believe it directly affects them less compared to other aspects



**11%** ranked *reducing the level of leakage from UU's pipe network* as the lowest priority

“ | *That affects the customer the least*  
Female, 18-34

“ | *Although this is very important the others affect the customer the most*  
Male, 55+

“ | *This would not have a massive effect on most consumers but it is still very important*  
Female, 55+

“ | *They are all important, but this has less impact on single households.*  
Female, 35-54

“ | *It affects me the least but is still important.*  
Female, 55+

“ | *Doesn't directly impact customer use*  
Female, 35-54

# Health and hygiene, particularly in the current climate, are key reasons for *prevention of sewer flooding* being top priority

The disruption to daily life is also a key factor



**13%** ranked *preventing homes and businesses from being affected by sewer flooding* as the top priority

“ | *Having been flooded with sewage in the past I know what the effects are and how long it takes to clear the mess and how all the disruption to normal life and the odours left behind effect you and your welfare*  
Male, 55+

“ | *The risk to life from waterborne diseases would be to much of a risk particularly at this time*  
Female, 55+

“ | *Because it is very important for health, especially at this time, for there to be no possible chance of infection to add to the Covid-19 virus*  
Male, 55+

“ | *This could cause health problems and the disruption to customers could be costly and very inconvenient.*  
Male, 55+

“ | *Whereas a drop in water pressure or a brief interruption is inconvenient, it is much greater problem and health hazard if sewage leaks into homes or business*  
Male, 35-54

“ | *This causes the highest risk to people, bringing germs and bugs into living and working areas.*  
Female, 35-54

# Those ranking prevention of sewer flooding as lowest priority because they believe it's rare and unlikely to happen to them

 **13%** ranked *preventing homes and businesses from being affected by sewer flooding* as the lowest priority

“ | *Sewer flooding is not as prevalent as the other issues, and is being dealt with already through the "Think before you flush" campaign*  
Male, 18-34

“ | *In over 50 years I have never experienced a problem of this type and I feel that a quality water supply service and uninterrupted supply is of more importance.*  
Male, 55+

“ | *I'm sure if someone is affected by sewerage flooding that is a devastating situation. However, I believe this to be a relatively rare occurrence and therefore more time and effort should be spent in ensuring the basic water supply for all private and business needs.*  
Male, 55+

“ | *This is not something I have ever experienced. I see how devastating this is when houses and businesses are flooded on the news but doubt this would ever happen to me because we are so lucky to live in an area not affected by flooding.*  
Female, 55+

“ | *It doesn't happen often, the other area above this have more issues in our area anyway.*  
Male, 35-54

# Preventing accidental pollution is top priority mainly due to the environmental impact

Customers also cite the potential health implications via contaminated drinking water



**10%** ranked *preventing accidental pollution from UU activities* as the top priority

“ | *Any leak that is harmful to the environment or causes a hazard to people and wildlife is unwanted*  
Female, 55+

“ | *I think accidental pollution is probably the most costly to put right and effects the environment in a detrimental way.*  
Male, 55+

“ | *I think this is most important to prevent illnesses and bacteria escaping*  
Female, 35-54

“ | *Reliable supply of clean water is UU's primary responsibility*  
Male, unknown

“ | *Because in my opinion, environmental issues are the highest priority in order to maintain a sustainable and healthy planet.*  
Female, 55+

“ | *The environmental impact would be very large and take time to recover*  
Male, unknown

# Preventing accidental pollution is lowest priority because customers accept that accidents can happen



15% ranked preventing accidental pollution from UU activities as the lowest priority

“ | *Accidents are accidents and happen when not expected.*

*Male, 55+*

“ | *Because accidents can't be helped*

*Female, 55+*

“ | *If it's accidental, it can't be avoided, so there's no way this could be planned for or prioritised in the first place*

*Male, 35-54*

“ | *Accidents do happen hopefully not that often*

*Male, 55+*

“ | *Generally speaking you have no control over accidental pollution.*

*Male, 55+*

“ | *You cannot prevent accidents, if you could they would not be accidents*

*Male, 55+*

“ | *Accidents happen, they are beyond control*

*Female, 35-54*

“ | *You can't account for ACCIDENTAL incidents.*

*Male, 55+*



# Customers rank *reducing unplanned interruptions* as top priority due to water's importance to their daily lives



**8%** ranked *reducing unplanned interruptions* as the top priority

“ | *Because you don't realise how important water supply is for numerous things around house until you have no water!*  
Female, 55+

“ | *Planned interruptions can be worked around, unplanned ones throw businesses, such as our Dental Surgery into complete chaos.*  
Male, 55+

“ | *No water is a total nightmare. I have a toddler and I couldn't imagine not being able to use water. I remember a few years ago when there was an issue and we had to boil water first. That was awful and I didn't have a toddler then and we had water. I think people take clean running water for granted*  
Female, 18-34

“ | *A constant water supply is important to all our lives all people and especially businesses need water to run, also public services such as hospitals*  
Female, 55+

“ | *There is nothing worse than finding you have no drinking water or water to wash with, particularly with our present position with Covid19!*  
Male, 55+

# Customers rank *reducing unplanned interruptions* as lowest priority as they feel they're rare and difficult to anticipate



**25%** ranked *reducing unplanned interruptions* as the lowest priority

“

*You can't plan for the unforeseeable.*

*Male, 55+*

“

*I have lived at my home for 45 years and have had unplanned disruption only 2 times in that period.*

*Male, 55+*

“

*How can you know a pipe is going to burst, you cannot plan for this*

*Female, unknown*

“

*It's a rare occurrence anyway, and a minor inconvenience to most people. We have lived in the same house for 30 years, and I think it has happened less than 10 times.*

*Male, 55+*

“

*Accidents happen and I would not expect that you would always be able to plan for every eventuality.*

*Female, 55+*

“

*These are already so infrequent, in my experience, that reducing them further is not a priority for me. I have lived at my current address since 1988 and can only think of one or two occasions when my water supply has been interrupted in all the time I have lived here.*

*Male, 55+*

# Customers rating *good water pressure* as top priority link this to 'normal' everyday life

It's felt to be particularly important for the functioning of household appliances



**7%** ranked *maintaining good and constant water pressure* as the top priority

“ | *For modern living you need a consistent water pressure*  
Male, 55+

“ | *I use a supply shower so water pressure ensures that I am protected from scalding I am sure that most people are in the same position and a drop in pressure will cause many problems for us*  
Male, unknown

“ | *Because it makes a big difference, while having shower and impacts equipment like wash machine, dishwasher, causing issues and extra repair bills.*  
Male, 35-54

“ | *As it is important to have a good water pressure to ensure all your appliances work correctly*  
Male, 18-34

“ | *Because the water pressure isn't great in our house to begin with, so in order to keep dishwashers and washing machines etc going when we need them to (we have a baby so these are on constantly), it's necessary that water pressure is consistent.*  
Female, 18-34

# Good water pressure is ranked lowest because it's largely something customers could live without, occasionally at least



**30%** ranked *maintaining good and constant water pressure* as the lowest priority

“ | *It's nice to have constant water pressure but you can live with the odd hiccup*  
Male, 55+

“ | *It's not a major problem waiting for a kettle to fill and if the toilet cistern takes a couple of minutes to fill then it is not big issue.*  
Male, 55+

“ | *If it takes longer to fill a glass of water, it is of little importance but too low a pressure ay cause some problem with showers but these a small problems against those others that were listed.*  
Male, unknown

“ | *Water running a bit slower is not a huge inconvenience and I think we could live with that if all the other things are being done.*  
Female, 55+

“ | *So long as I have clean supply of drinking water that is first priority. Getting sewage away is necessary for health. For showers, washing machines, dishwashers etc a good constant pressure is essential but not life threatening.*  
Female, 55+

# Customers were then shown the following statistics relating to the six service areas



## Providing water that tastes and smells good, and is not discoloured

Currently around **40 in every 10,000 customers** contact us each year about problems with **taste, smell or discolouration of water**



## Preventing homes and businesses from being affected by sewer flooding

Currently around **4 properties in every 10,000 customers' properties** are affected by **internal sewer flooding** each year



## Preventing accidental pollution (e.g. sewage leaks) from United Utilities activities

Currently there are around **190 pollution incidents per year**



## Reducing the level of leakage of water from United Utilities' pipe network

Currently around **130 litres of water per customer (the equivalent of one bath)** leak from the water network each day



## Maintaining good and constant water pressure

Currently **less than one in every 10,000 customers** receive water pressure **below the guaranteed standard**



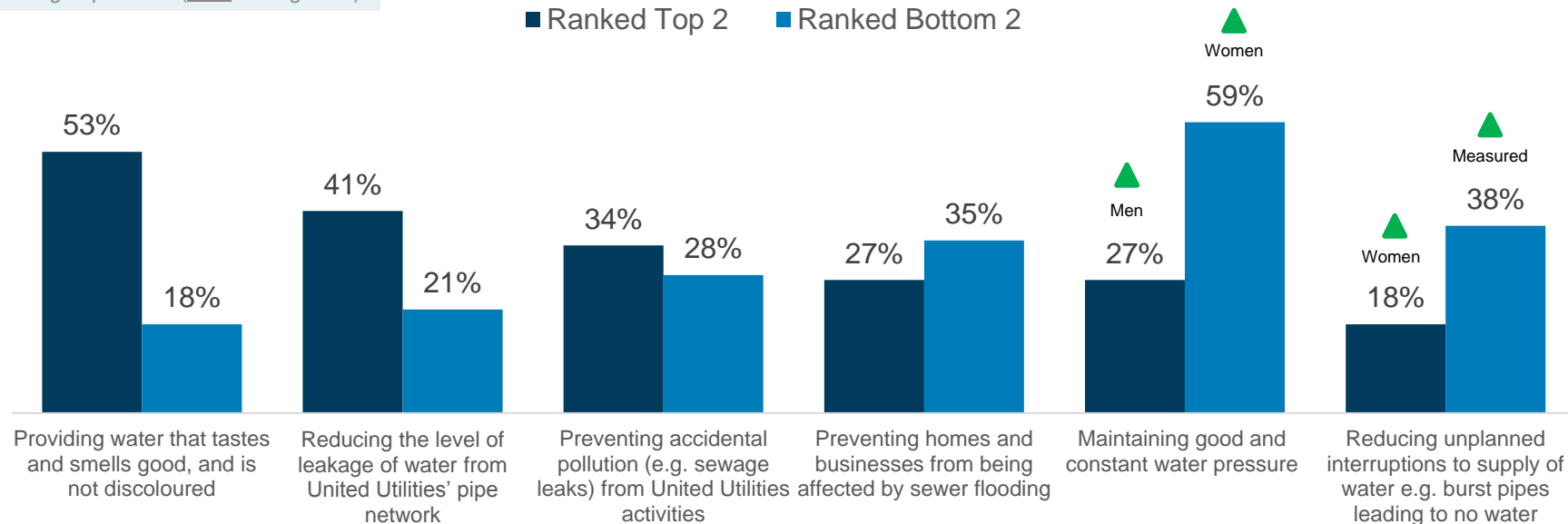
## Reducing unplanned interruptions to supply of water e.g. burst pipes leading to no water

Currently **270 in every 10,000 customers** are affected each year by **water supply interruptions, lasting on average for 6 hours**

# After seeing the stats, customers still give highest priority to *provision of water that tastes and smells good*

However, maintaining good water pressure is now out on its own as the lowest priority by far, due to the relatively low numbers of customers currently affected (<1 in 10,000)

Ranking of priorities (after seeing stats)



Q4. Based on the information you've just seen, please rank the service areas again from the highest priority (1) to the one you think should be given least priority (6).

Base: All respondents (n=808)

Source: Customer Priorities WaterTalk survey (May 2020)

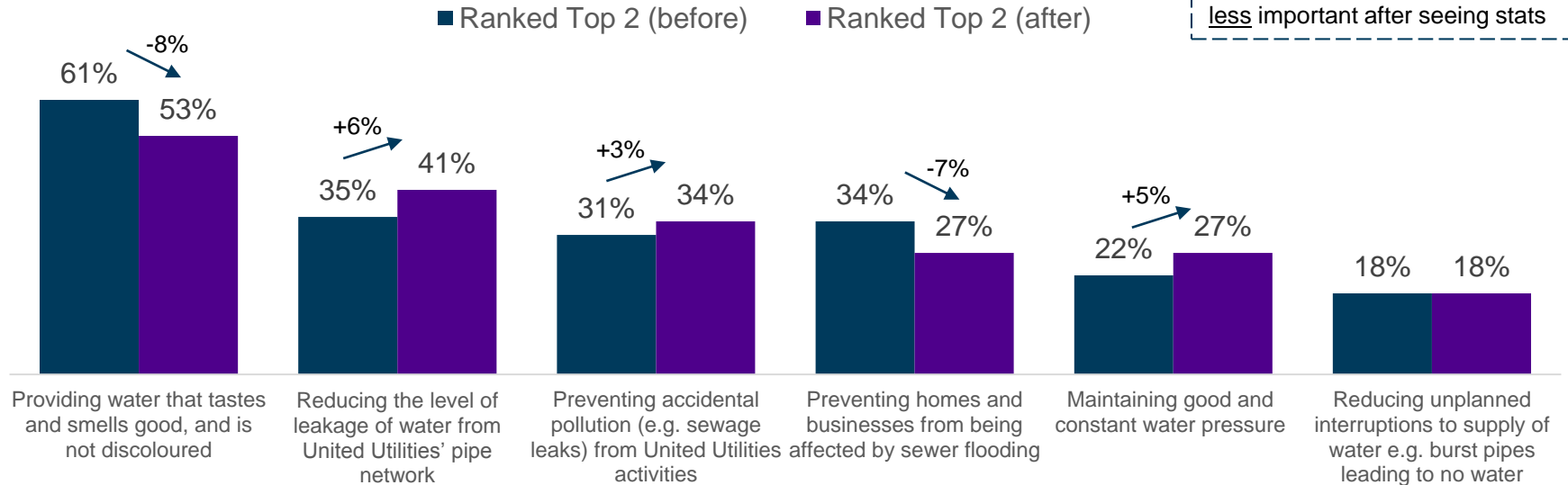
▲ ▼ Triangle: Significant difference at 95% conf. level.



# Provision of clean water and preventing sewer flooding become slightly less important after the stats were shown

Conversely, *reducing leakage, preventing accidental pollution, and maintaining good water pressure* see increases in prioritisation

Ranking of priorities (before and after seeing stats)



Q1. When thinking about the water and sewerage services that United Utilities provides, how important is it that United Utilities prioritises the following areas for improvement to ensure they can deliver those services now and in the future? / Q4. Based on the information you've just seen, please rank the service areas again from the highest priority (1) to the one you think should be given least priority (6). Base: All respondents (n=808)

Source: Customer Priorities WaterTalk survey (May 2020)

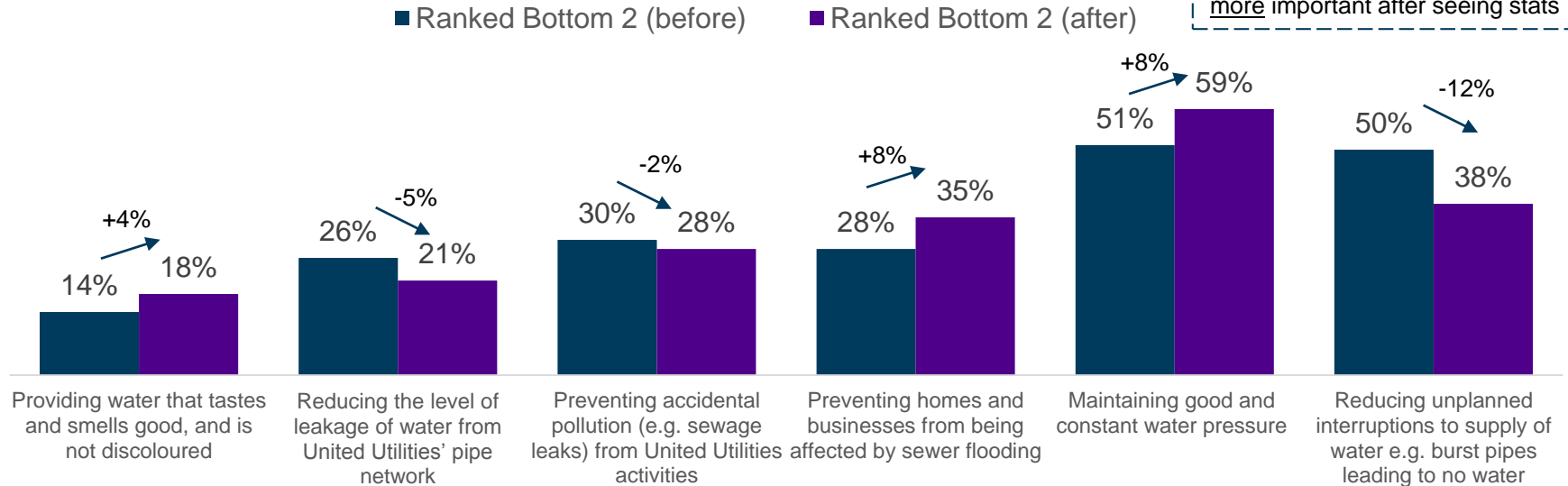


# Reducing leakage, preventing accidental pollution and reducing unplanned interruptions become more important

Conversely, provision of clean water, preventing sewer flooding, and maintaining good water pressure see decreases in prioritisation

Ranking of priorities (before and after seeing stats)

Increase in % = service area less important after seeing stats  
Decrease in % = service area more important after seeing stats



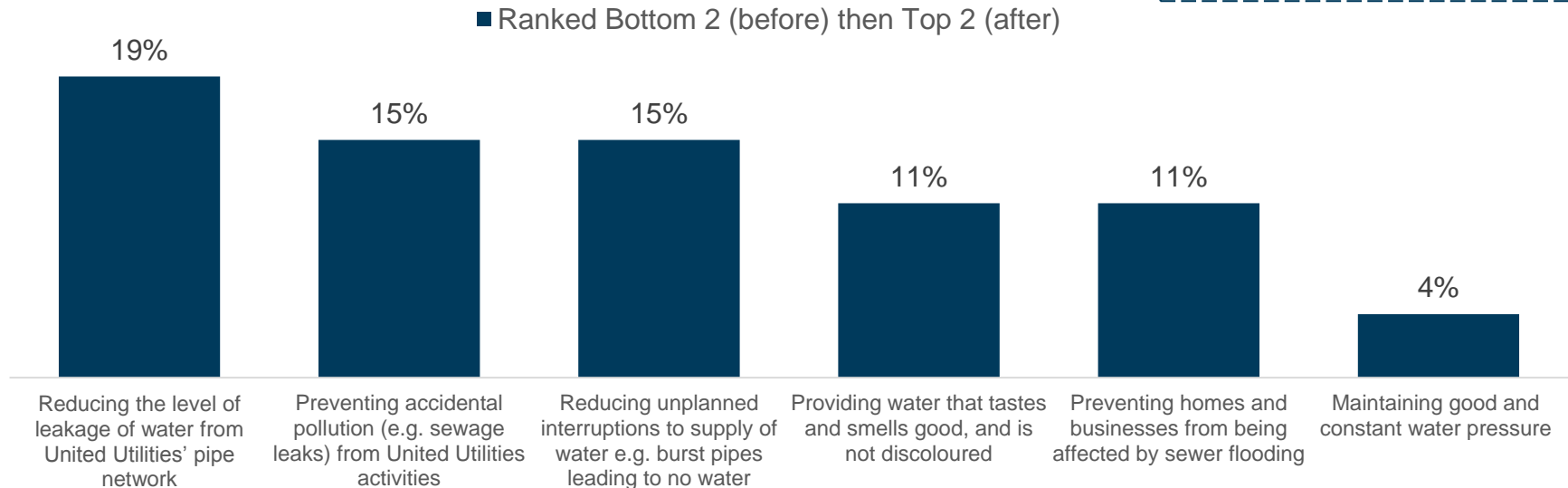
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Source: Customer Priorities WaterTalk survey (May 2020)

# The stats were most likely to have a positive impact on the ranking for *reducing the level of leakage*

Priorities ranked Bottom 2 then Top 2 after seeing the stats


% of those initially ranking service area in bottom two, then ranked it in top two after seeing the stats



Q1. When thinking about the water and sewerage services that United Utilities provides, how important is it that United Utilities prioritises the following areas for improvement to ensure they can deliver those services now and in the future? / Q4. Based on the information you've just seen, please rank the service areas again from the highest priority (1) to the one you think should be given least priority (6). **Base: All ranking service area as bottom two priority before seeing stats (base sizes vary by service area)**

Source: Customer Priorities WaterTalk survey (May 2020)

# Customers are surprised at the amount of water lost to *leakage*, which makes other aspects feel less important by comparison

 **19%** of those who ranked *reducing the level of leakage* as a bottom two priority changed this to a top two priority after seeing the stats

“ | *The amount of water that is lost is a ridiculous amount, this needs to be reduced and help prevent other problems*  
Female, 18-34

“ | *The amount that is wasted from the network is higher than I would have expected and it is a key area to manage scarce resources and lower customer bills*  
Male, 35-54

“ | *Due to your stats it seems to be a bigger issue than I imagined so needs addressing for times when we have shortages.*  
Male, 35-54

“ | *The level of leakage in the system must be a big cost to customers. When compared with other priorities it's a bigger issue*  
Male, unknown

“ | *It seems the other issues are being dealt with appropriately and don't present a frequent disruption to the customers. On contrast, the amount of leakage is impressively high*  
Female, 35-54

“ | *If you could cure the leak problems then the other priorities could be put further up the list*  
Male, 55+

Q5. You previously ranked *reducing the level of leakage of water from United Utilities' pipe network* as one of the bottom two priorities, but now you've ranked it as one of the top two priorities, what made you change your mind? Base: All ranking as bottom two priority then top two priority (n=31)  
Source: Customer Priorities WaterTalk survey (May 2020)

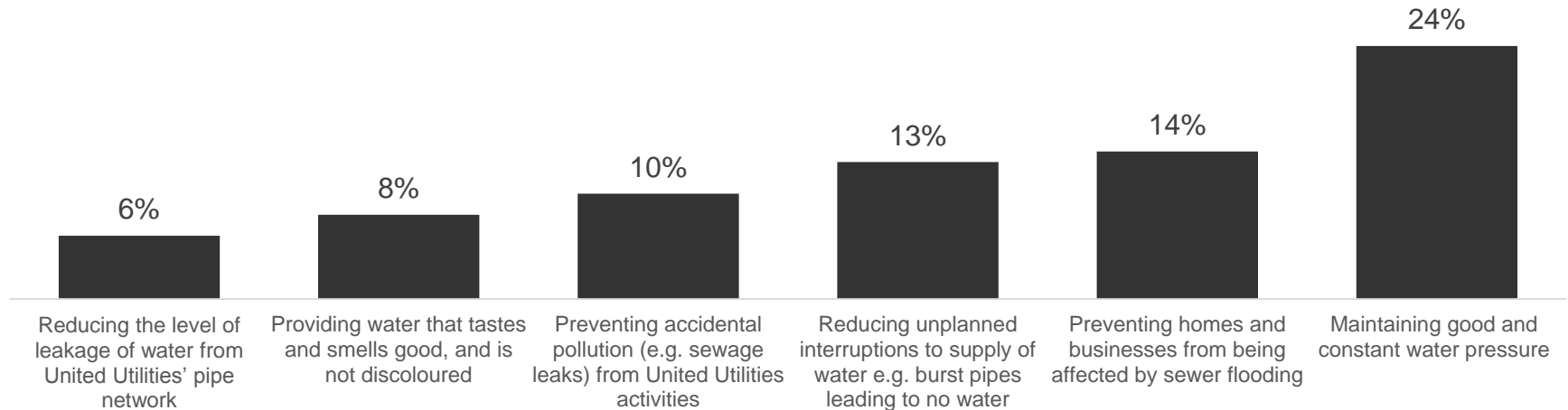


# Conversely, *maintaining good water pressure* was most likely to drop in importance after customers were shown the stats

Priorities ranked Top 2 then Bottom 2 after seeing the stats

% of those initially ranking service area in top two, then ranked it in bottom two after seeing the stats

■ Ranked Top 2 (before) then Bottom 2 (after)



Q1. When thinking about the water and sewerage services that United Utilities provides, how important is it that United Utilities prioritises the following areas for improvement to ensure they can deliver those services now and in the future? / Q4. Based on the information you've just seen, please rank the service areas again from the highest priority (1) to the one you think should be given least priority (6). **Base: All ranking service area as top two priority before seeing stats (base sizes vary by service area)**

Source: Customer Priorities WaterTalk survey (May 2020)

# The stats make customers feel that *maintaining good water pressure* isn't actually a big issue in the wider scheme of things

 **24%** of those who ranked *maintaining good and constant water pressure* as a top two priority changed this to a bottom two priority after seeing the stats

“ | *I wasn't aware that the majority of people have the guaranteed water pressure already*  
Female, 35-54

“ | *You said a very small proportion don't get constant water pressure so it seems like you have this well under control. I still think it's important though.*  
Female, 18-34

“ | *I've just seen the statistics I now realise that this wasn't a great problem*  
Male, 35-54

“ | *Pressure is only a problem to a minority of households so other issues would be more of a priority as they affect more people*  
Female, 35-54

“ | *Doesn't seem to be a big problem and isn't the end of the world if it's just a little lower pressure than normal.*  
Female, 35-54

“ | *The number of incidents is not that high when compared against others*  
Female, 35-54

Q5. You previously ranked *maintaining good and constant water pressure* as one of the top two priorities, but now you've ranked it as one of the bottom two priorities, what made you change your mind? Base: All ranking as bottom two priority then top two priority (n=28)  
Source: Customer Priorities WaterTalk survey (May 2020)

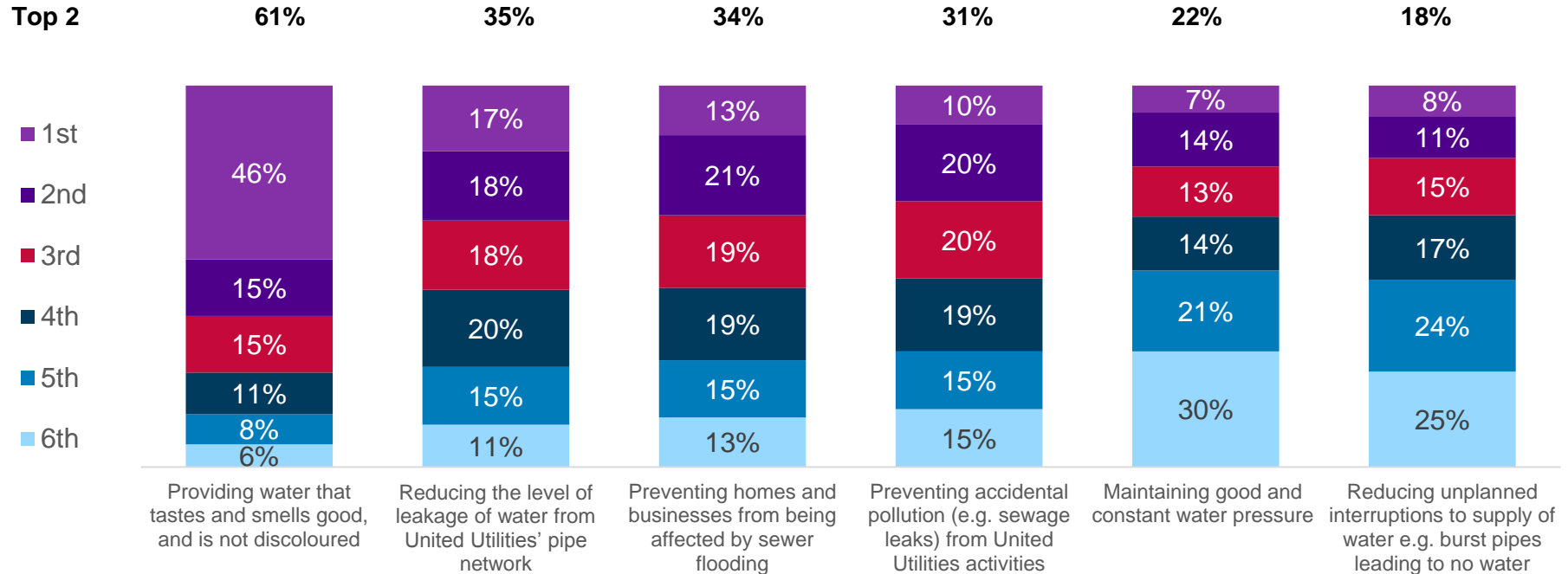


# Appendix



# The *provision of clean water* is by far the top priority for customers

Ranking of priorities (*before* seeing stats)



Q1. When thinking about the water and sewerage services that United Utilities provides, how important is it that United Utilities prioritises the following areas for improvement to ensure they can deliver those services now and in the future?

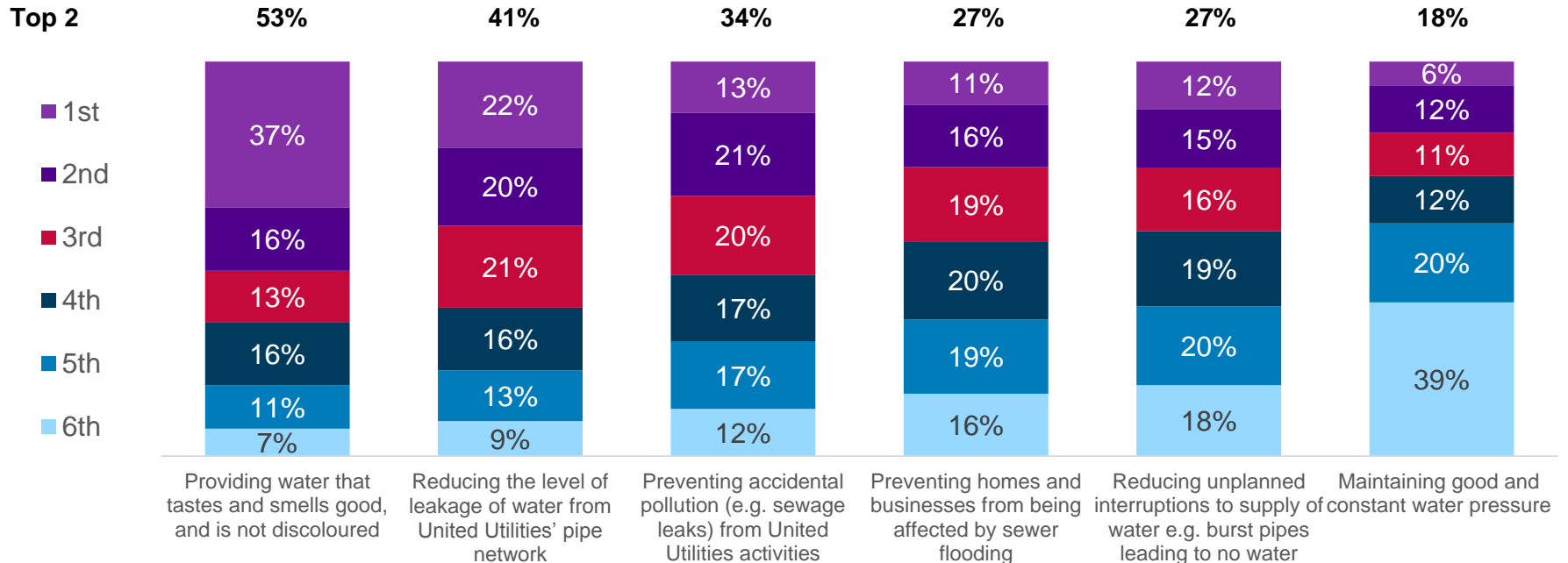
Base: All respondents (n=808)

Source: Customer Priorities WaterTalk survey (May 2020)



# After seeing the stats, customers still give highest priority to *provision of clean water*

Ranking of priorities (after seeing stats)



Q4. Based on the information you've just seen, please rank the service areas again from the highest priority (1) to the one you think should be given least priority (6).

Base: All respondents (n=808)

Source: Customer Priorities WaterTalk survey (May 2020)

# Sample profile

Total	Unweighted	
	Count	%
<b>Gender</b>		
Male	552	68%
Female	251	31%
Unknown	5	1%
<b>Age</b>		
18-34	42	5%
35-54	156	19%
55+	551	68%
Unknown	59	7%
<b>Region</b>		
Cheshire	129	16%
Cumbria	70	9%
Greater Manchester	293	36%
Lancashire	185	23%
Merseyside	122	15%
Unknown	9	1%