



# Customer Listening

Research Report

May 2022

# What we'll cover today...

1. Background, objectives and method
2. Consumer views of water provision and their environmental priorities
3. Reactions to the four-part plan to improve river health and recreation
4. Summary of the key findings



# 1. Background, objectives and method



# A need for live and unfiltered feedback from customers



United Utilities made a commitment to Ofwat that as part of its plan to engage and foster trust among its customers, it would hold a series of listening sessions where members of the Executive and Board could hear live and unfiltered consumer feedback on what matters to them and their expectations of United Utilities when it comes to the environment, pollution and the way it runs its business

Along with feedback from stakeholders and employees, the results will be used as part of action planning and driving positive change.



## Key topics covered:

- **Water context** – engagement with water, along with views and expectations of United Utilities
- **Environmental priorities** – what matters to them, what do they see as United Utilities responsibilities and how do they feel about river health?
- **Reactions to the United Utilities goals** – assessing in detail the four-part plan to improve river health and recreation



# We ran six focus groups across the five United Utilities regions

We engaged with a good mix of customers and a group of future customers (16-18 year olds)

	Life-stage	Location	Dates	Other criteria	Our United Utilities attendees
1	2x pre-family 3x family 2x post-family	<b>Manchester, central</b>	Weds 27 <sup>th</sup> April	<ul style="list-style-type: none"> <li>Mix of males and females</li> <li>All supplied by United Utilities and aware of this</li> </ul>	<ul style="list-style-type: none"> <li>Louise Beardmore – CEO Designate</li> <li>Alison Goligher – Non-Executive Director</li> </ul>
2	2x pre-family 3x family 2x post-family	<b>Liverpool, central</b>	Thurs 28 <sup>th</sup> April	<ul style="list-style-type: none"> <li>All mainly/solely or jointly responsible for paying the water bill for their household</li> </ul>	<ul style="list-style-type: none"> <li>Paulette Rowe – Non-Executive Director</li> </ul>
3	2x pre-family 3x family 2x post-family	<b>Preston</b>	Weds 4 <sup>th</sup> May	<ul style="list-style-type: none"> <li>A mix within each group of those renting and those who own/have a mortgage</li> <li>A mix of metered / unmetered customers</li> </ul>	<ul style="list-style-type: none"> <li>James Bullock – Strategy, policy and regulation Director</li> <li>Jo Harrison – Environment, Planning and Innovation Director</li> </ul>
4	2x pre-family 3x family 2x post-family	<b>Warrington</b>	Weds 11 <sup>th</sup> May	<ul style="list-style-type: none"> <li>Mix of incomes</li> </ul>	<ul style="list-style-type: none"> <li>Paula Steer – Health, Safety &amp; Wellbeing, Estate Services Director</li> </ul>
5	7x 16-18 living at home with parents (youth)	<b>Warrington</b>	Weds 11 <sup>th</sup> May	<ul style="list-style-type: none"> <li>None disengaged with water / pollution / the environment / the community, but none to be highly engaged either</li> <li>Mix of ethnic backgrounds</li> </ul>	<ul style="list-style-type: none"> <li>Mark Garth – Wastewater Treatment Director</li> <li>Keve Fowlie – Commercial, Engineering and Capital Delivery Director</li> </ul>
6	2x pre-family 3x family 2x post-family	<b>Kendal</b>	Thurs 12 <sup>th</sup> May	<ul style="list-style-type: none"> <li>X2 per group had experienced pollution incident</li> </ul>	<ul style="list-style-type: none"> <li>Gaynor Kenyon – Corporate Affairs Director</li> </ul>

# 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

The results from the research were used to form an action plan and understand what our customers feel we should be doing in areas such as river health and environment. Members of the United Utilities Executive Board were able to listen to live (and unfiltered) feedback, and results were used as part of our commitments to Defra and the Better Rivers Better North West campaign.

## Fit for purpose

This research was designed with the customer in mind. The research materials were designed to gain the best unfiltered feedback, and United Utilities participants were fully briefed before the event. The materials underwent cognitive testing to ensure they were fit for purpose.

## Ethical

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

## Continual

The outputs of this research were contextualised using a wide evidence base including research that followed on environmental priorities, river health and United Utilities as a brand.

## Neutrally designed

Every effort has been made to ensure that the research is neutral and free from bias. Where there is the potential for bias, this has been acknowledged in the report. Participants were encouraged to give their open and honest views and reassurances were given throughout the research that United Utilities attendees were open to hearing their honest opinions and experiences.

## Inclusive

Quotas were set based on the known profile of United Utilities customers, including vulnerable customers. As the focus groups were undertaken face to face, those who were digitally excluded were able to partake.

## Shared in full with others

The research is published and shared on our website and through our industry customer insight newsletter, The Source.

## Independently assured

All research was conducted by Boxclever, an independent market research consultancy. United Utilities shared the methodology and results with Your Voice, the Independent Challenge Group.


## 2. Consumer views of water provision and their environmental priorities



# There was a lack of engagement with water

Most customers had:

- Never had a problem with their water supply
- Never needed to deal with UU beyond paying bills
- Never directly experienced a 'pollution incident'



*"I turn the tap on and the water's there – I'm not thinking deeply about it!"*



# Only a minority were aware of United Utilities' work & responsibilities

**Amongst the more engaged, there's recognition that United Utilities is a big business with a lot to look after...**

- Provide water via an antiquated Victorian infrastructure
- Wastewater is a crucial part of water supply
- Involved with reservoirs and green space recreation
- Involved with the environment and river upkeep
- Educate the NW on how to save water
- Comply with Ofwat regulations

*"It's a big responsibility – they have to look after their assets, the infrastructure and comply with the regulator"*

# United Utilities was typically viewed positively – there's belief that we're doing a good job

*“We're blessed to have United Utilities – the water here is fresher and softer compared to London.”*

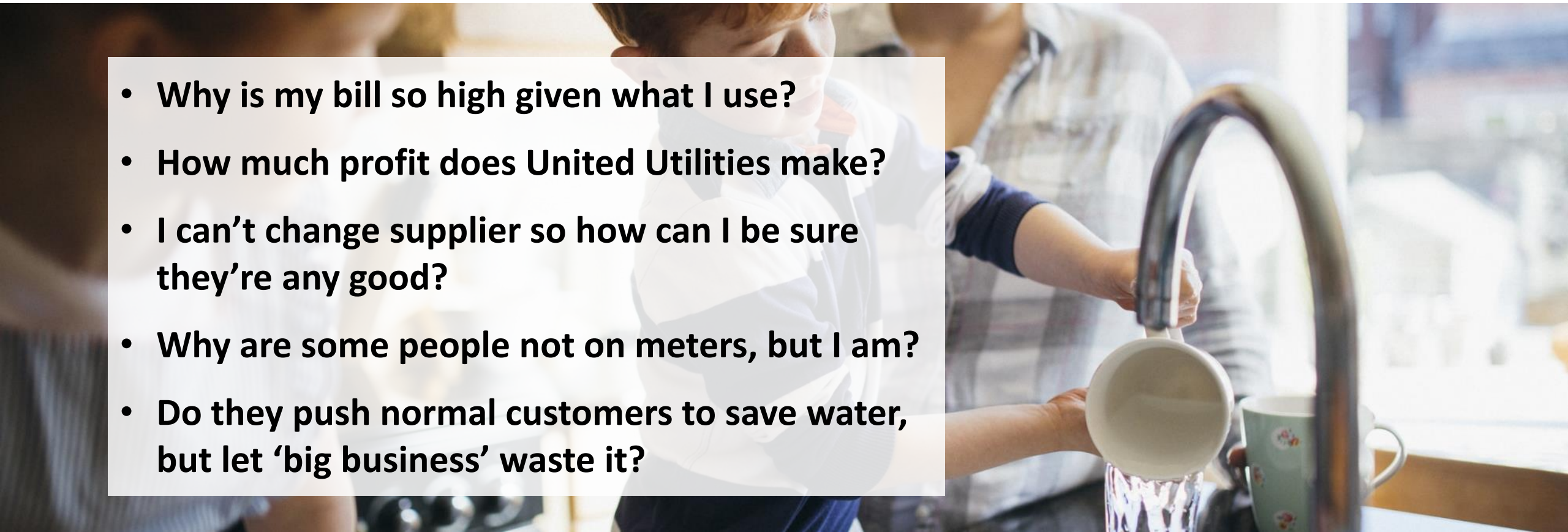
- ✓ Consistently reliable service
- ✓ Lower cost than other utilities
- ✓ Where there have been issues with supply, these have been resolved effectively
- ✓ Despite a recent media spotlight, there's a lack of understanding about the ways United Utilities might be negatively impacting the environment



# Only a minority had a few concerns and questions about United Utilities

*“I pay a lot compared to my daughter’s bill, but why when she’s a family of four? I can’t work that out!”*

- **Why is my bill so high given what I use?**
- **How much profit does United Utilities make?**
- **I can’t change supplier so how can I be sure they’re any good?**
- **Why are some people not on meters, but I am?**
- **Do they push normal customers to save water, but let ‘big business’ waste it?**



# River health was not a top-of-mind key environmental concern for customers

*“To be honest with you – rivers? Not really, no. I’ve not thought about it.”*



# Customers typically looked to the tangible environmental issues with a bearing on or visibility in their everyday lives

- Litter
- Cars / air pollution
- A lack of usable green space in urban areas
- Flooding\*
- Dirty canals
- Use of plastic

*\*Customers didn't differentiate between clean water and sewage flooding / overflow*



*“The litter is horrendous all around Manchester”.*

# When prompted, customers agreed river health is important

- There are some clearly polluted rivers across the NW
- Rivers might be better than they were years ago, but many could still be much better
- Rivers are key for wildlife
- People *should* be able to swim in and enjoy them
- Enjoying rivers is free and healthy entertainment
- Clean rivers demonstrate pride in the local area

*“We don’t know if our rivers are safe to swim in. Locals won’t let their kids paddle – there’s a belief it’s polluted by sewage”.*



# Location has an impact on how customers engage with water



Cumbrians were typically more engaged as water can be very important to their work and recreation.



Urban customers can be less engaged with water-focused environmental issues than their rural counterparts.



Those that had been close to flooded areas or knew people impacted by flooding were clear about how important it is to prevent it.

# Future customers (16-18) were sometimes as or more engaged with water, United Utilities and the environment than the adults

1. Learned about the importance of saving water at school
2. Learned about the water cycle and the role of organisations like United Utilities at school
3. Environmentally engaged having been taught from a young age that significant action needs to be taken to reduce the harm we cause\*

*\***However**, not all were actively interested in taking environmental action beyond that which is convenient and commonplace (e.g. using recycling bins).*



*“As a generation, we’ve been brought up with it. Like ‘Planet Earth’ filming places that have been changed by litter. It’s on social media and Greta is a role model for our generation”.*



# 3. Reactions to the four-part plan to improve river health and recreation



**1.**

**Ensuring our operations progressively reduce harmful impacts on river health**

**2.**

**Being open and transparent about our performance and our plans**

**3.**

**Making rivers beautiful and supporting others to improve and care for them**

**4.**

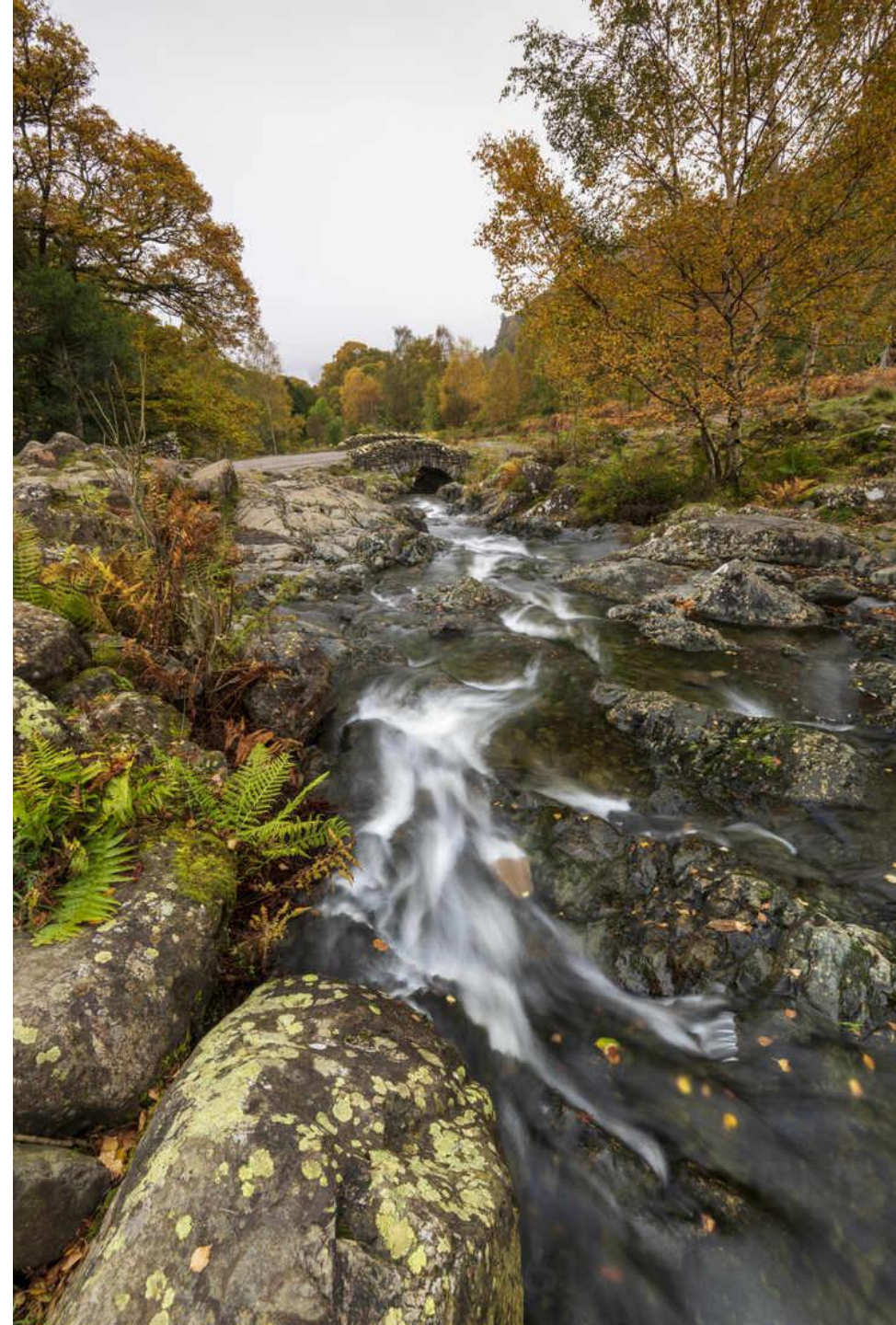
**Creating more opportunities for everyone to enjoy rivers and waterways**

**Reducing harmful impacts on rivers (goal 1)  
was considered the most important goal**

*Being open and accountable (goal 2) was considered crucial for its success (assuming the comms. are proactive, simple and engaging)*

**Customers' urged United Utilities to focus on goals 1 & 2 rather than an attempting to do all 4 and spreading itself too thinly**

*"It's impressive, but is it realistic? Should they focus on one thing at a time and get the really important things sorted?"*



# The four goals made sense as a set and as a 'flow'

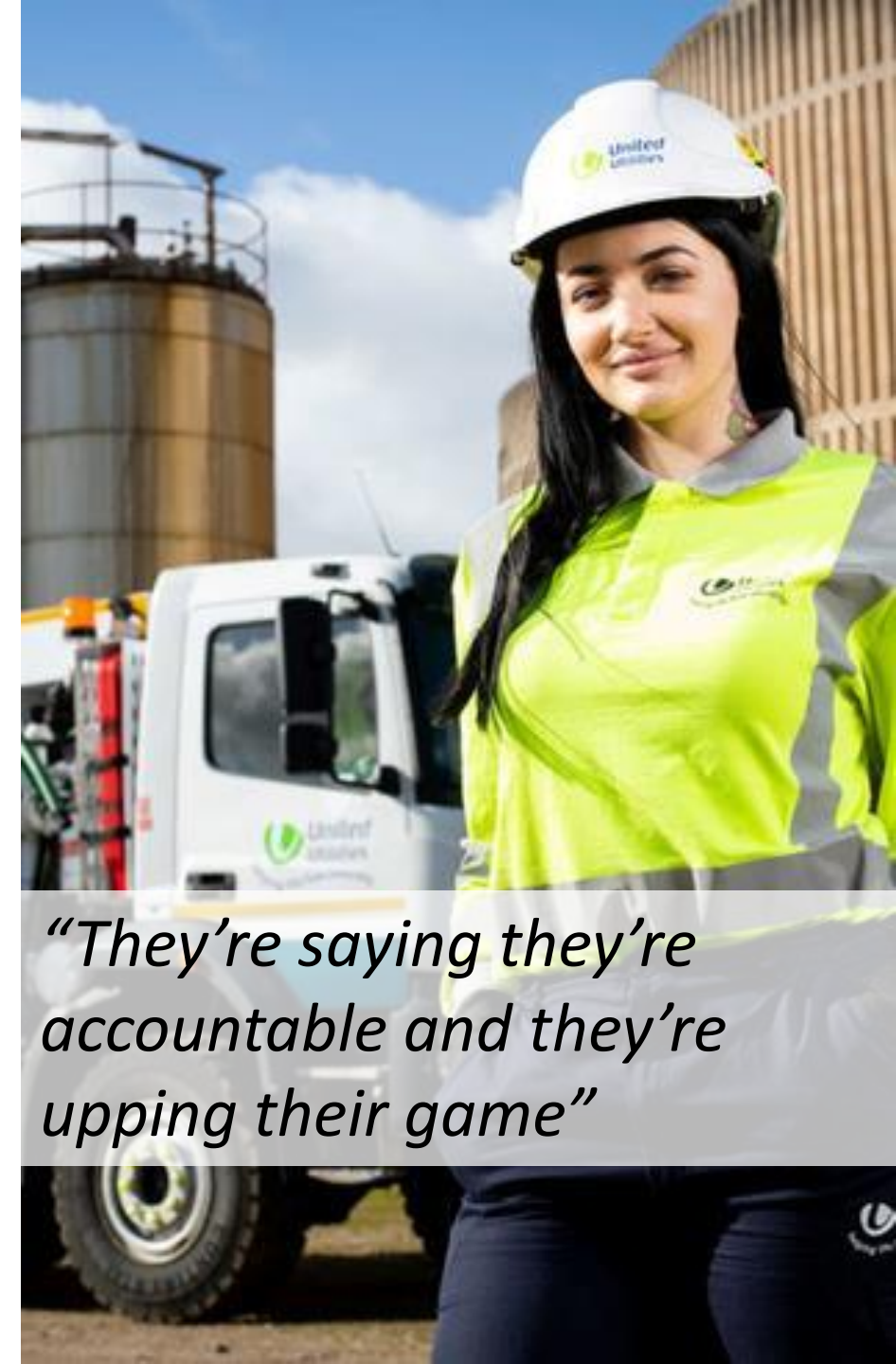
1. Take care of the big pollution issues as a priority (goal 1)
2. Make sure you're accountable for your promises (goal 2)
3. By taking care of goal 1, it creates the platform for better collaborative care of rivers (goal 3)
4. If rivers are healthy and beautiful, there's more desire and potential for using them more (goal 4)



# Achieving the goals will boost trust in United Utilities

**Pledging to make positive changes to river health and communicate openly about performance suggests United Utilities is looking beyond profits.**

United Utilities is at least trying to do something important for the NW.



*“They’re saying they’re accountable and they’re upping their game”*

# Being local is key to customer engagement

*Macro goals and associated efforts and communication need to be grounded in 'local'.*

*“Be local, focus on communities – it sticks out more when it’s where you live”*



# There was a reluctance to pay more to help United Utilities achieve the goals

- Bills are high enough
- Times are financially tough for a lot of households
- United Utilities makes profits, so the money should come from that





# 1.

## Ensuring our operations progressively reduce harmful impacts on river health

- a) Deliver a significant reduction in pollution caused by sewer water entering rivers by 2030
- b) No serious pollution incidents caused by United Utilities
- c) Monitor the impact of any sewer water entering the river system
- d) Reduce the amount of sewer water entering rivers by at least one-third by 2025
- e) Aim to reduce pollution incidents that have an impact on the environment, people or property by 50% by 2025
- f) Recruit over 100 Green Apprenticeship roles by 2030 – i.e. scientists, land managers, engineers to help tackle river health and environmental challenges

*Note: Goals were re-worded to be more colloquial and 'customer friendly'*

# Goal 1

**River health isn't an issue that is visible and prominent for many as they go about their day-to-day lives.**

However, once goal 1 was seen and understood, there was a desire for United Utilities to take every action to reduce harm to rivers.



*“This should be the benchmark already. Why aren't they doing it already?”*



# Goal 1

## More engaged customers wanted greater clarity:

What do “significant” and “serious” mean?

What would a reduction of a third or 50% really mean?

How exactly will these goals be achieved?

What has already been achieved or started?

Can the scope be broadened to cover lakes, canals and coastline, as well as rivers?



*“These are difficult to argue with, but we need to know more. These are a bit wishy-washy, they lack a bit of substance”*



## 2.

# Being open and transparent about our performance and our plans

- a) Ensure all sewer water entering rivers from storm overflows is monitored by 2023
- b) Provide easy access to timely data when there has been a sewer water discharge
- c) Publish an annual report on storm overflows
- d) Provide total transparency relating to action plans for all overflows that operate frequently by end of 2022
- e) Provide greater transparency on the link between environmental performance and financial reward
- f) Create an independent environmental scrutiny committee to drive greater overseeing of our actions/activities
- g) Hold an Environmental AGM to review performance and progress
- h) Encourage collaboration and innovation to drive new ideas on pollution solutions

*Note: Goals were re-worded to be more colloquial and 'customer friendly'*

# Goal 2

**There was an expectation that United Utilities will be required to make its actions, achievements and issues public.**

Transparency was often considered essential if the goal of reducing harmful impacts on river health is to be achieved.



*“This should just be getting done anyway! It’s normal data that companies should be providing. If they’re not already doing this then they’re lagging behind”*

# Goal 2

## Customers' advice on openness and transparency was very clear:

1. Go to them - use Instagram and its 'influencers', Facebook, TikTok, local newspapers, local news & weather, local radio and door drops
2. Communicate in the places people are using water via displays and QR codes
3. Deliver very simple, bitesize, accessible info accessible and engaging messages



*"It's got to be so simple – most won't understand any of these reports. They'd have to make it relevant to the general, normal population".*

# 3.

## Making rivers beautiful and supporting others to improve and care for them

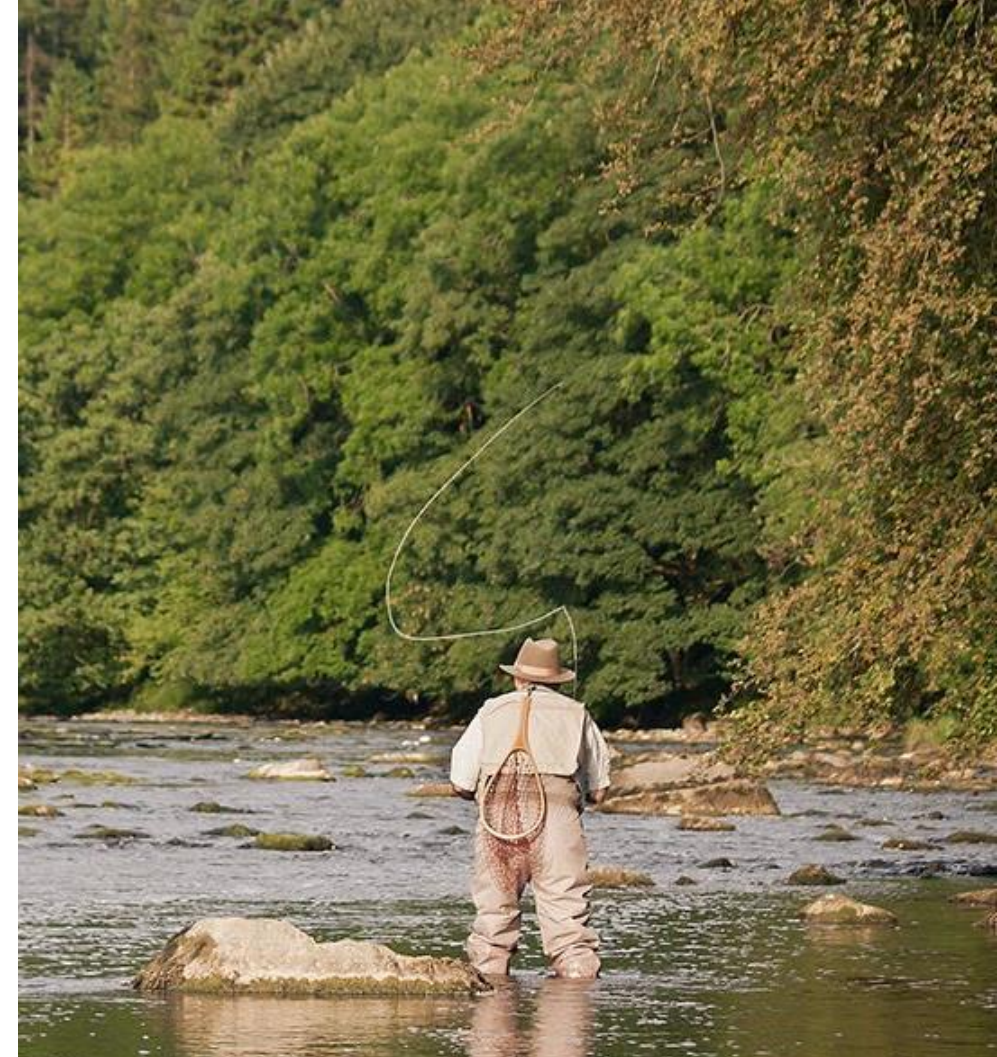
- a) Incentivise farmers to change existing practices to reduce negative impacts on river quality
- b) Promote responsible development by supporting the removal of the automatic right to connect drains on new housing estates/ developments to existing sewers
- c) Champion legislation to ban those wet wipes that negatively impact the environment and water quality (i.e. contain plastic and/or clog our sewer system)
- d) Lead and partner with other interested parties (e.g. Rivers Trust, RSPB and local authorities and bodies to play their part in improving river health)
  - Convene a North West Rivers summit in 2022
  - Community Fund to support groups to improve our rivers
  - North West citizen scientists (where members of the community participate in the scientific research and collection of data on river health)
  - Fund local universities and research studies to understand river health
  - Help our network of employee volunteers to focus on river health
  - Plant over 1 million trees by 2030
- e) A Site of Special Scientific Interest (SSSI) is a formal conservation designation. Usually, it describes an area that's of particular interest to science due to the rare species of fauna or flora it contains - or even important geological or physiological features that may lie in its boundaries. We aim to achieve 100% of sites in a healthy or recovering state on the land that we own.

*Note: Goals were re-worded to be more colloquial and 'customer friendly'*

# Goal 3

River beauty wasn't often spontaneously mentioned as a top-of-mind environmental concern (unless it was part of a wider concern about litter).

However, once these goals were seen and understood there was a desire for United Utilities to take every action to improve rivers collaboratively.



*“It’s really positive, they’re creating the energy for change, but they’ve got to drive it, keep it going, stop it fading away”.*



# 4.

## Creating more opportunities for everyone to enjoy rivers and waterways

- a) Make sure that 95% of customers will be no further than 30 miles from bathing water
- b) Play our part in creating and promoting additional inland bathing waters in the North West
- c) Create a number of new water-based clubs (i.e. sailing, swimming, canoeing) for everyone in the North West to enjoy

*Note: Goals were re-worded to be more colloquial and 'customer friendly'*

# Goal 4

Access to rivers and waterways is undeniably positive and can make a tangible difference to customers' enjoyment of the NW.

However, access to rivers and waterways is not a necessity and was not deemed as important as the environmental goals.

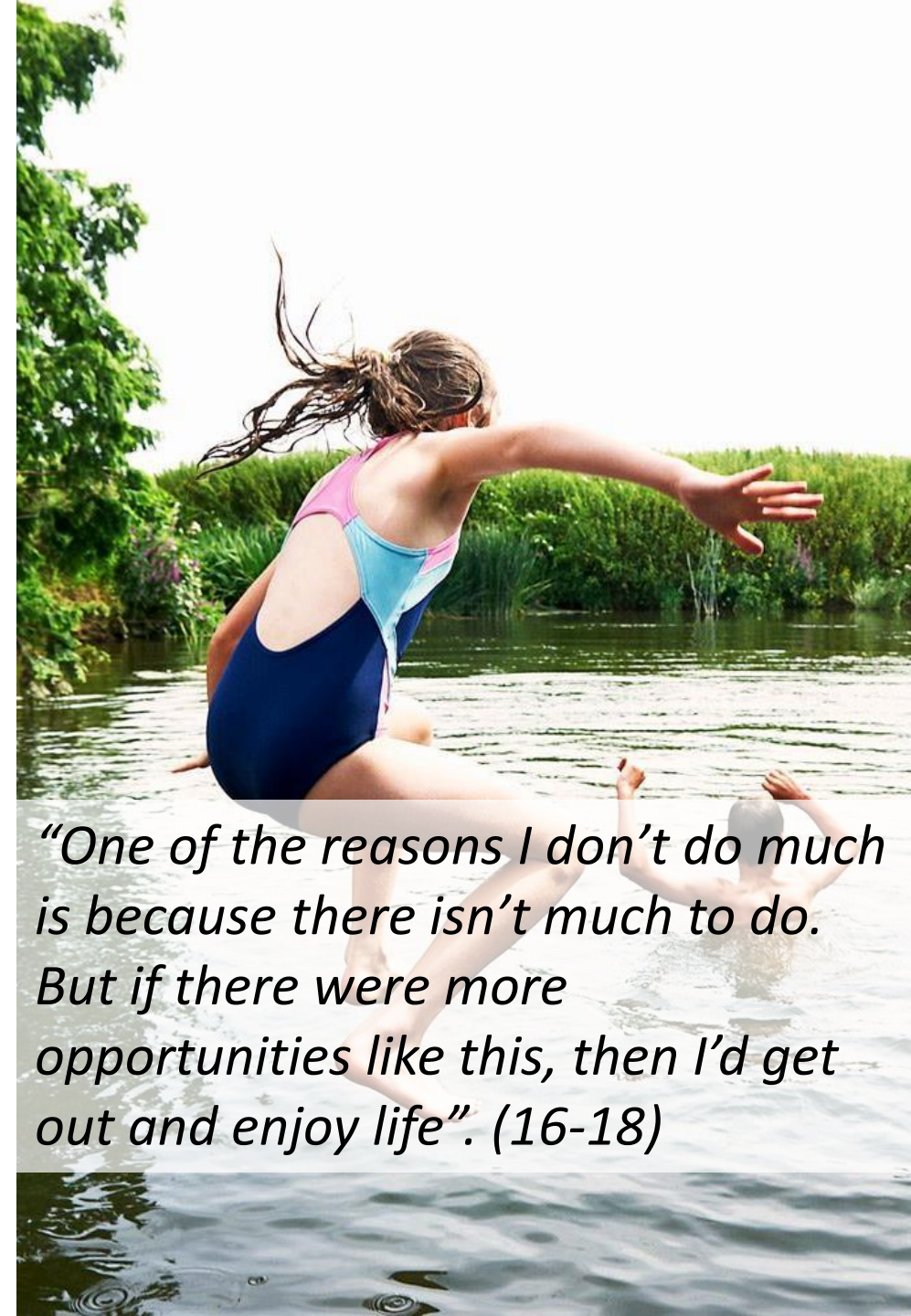


*“If you want to do this sort of thing, you can already do it. The main priority has to be sorting out the environment”.*

# Goal 4

**Our young participants could see how recreation opportunities would directly benefit them.**

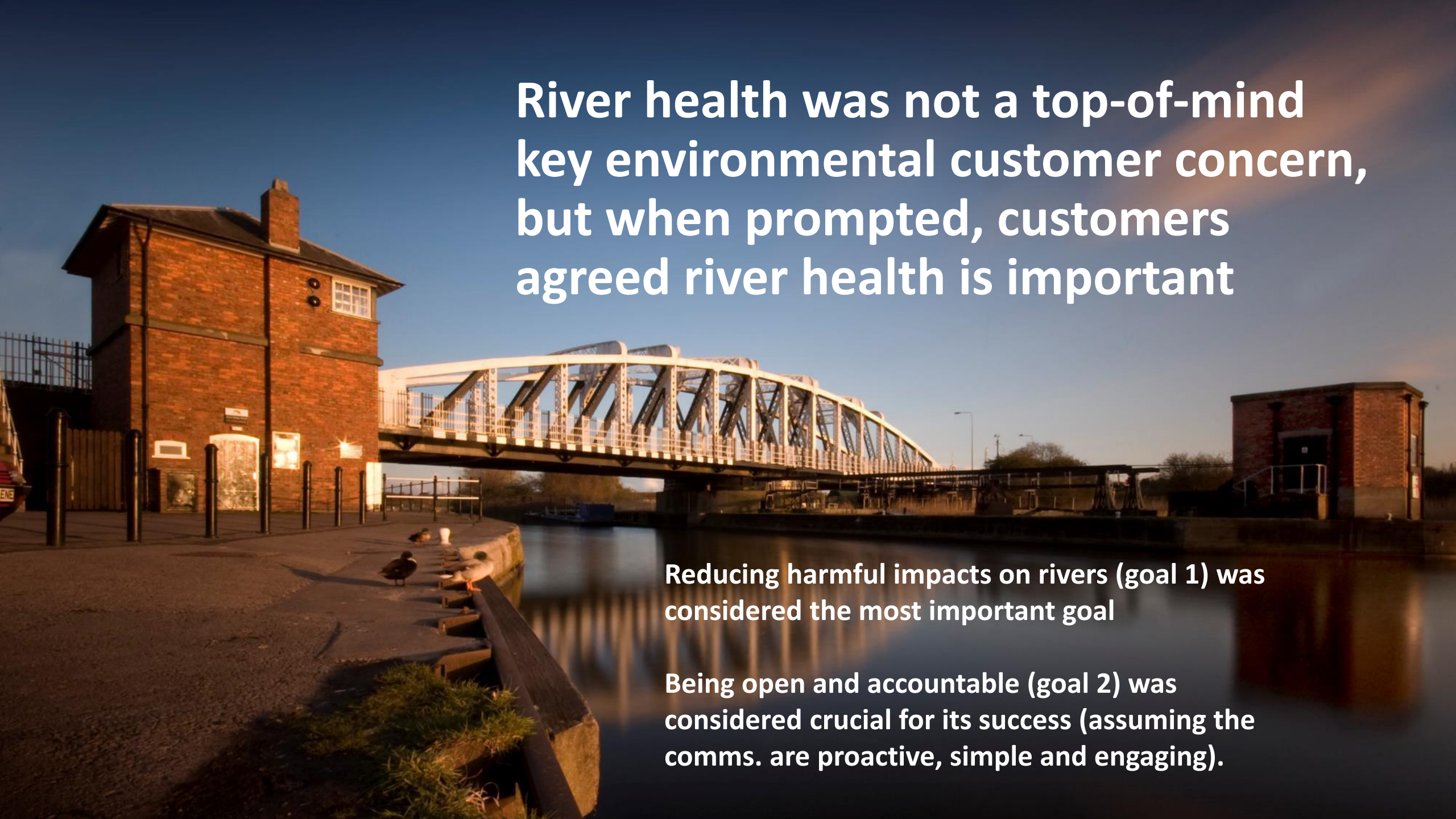
They were looking for new ways to entertain themselves, to relieve boredom. They considered this goal more relevant and important.



*“One of the reasons I don’t do much is because there isn’t much to do. But if there were more opportunities like this, then I’d get out and enjoy life”. (16-18)*

# 4. Summary of key findings





**River health was not a top-of-mind key environmental customer concern, but when prompted, customers agreed river health is important**

**Reducing harmful impacts on rivers (goal 1) was considered the most important goal**

**Being open and accountable (goal 2) was considered crucial for its success (assuming the comms. are proactive, simple and engaging).**