State of the Nation

(Wave 8)

May 2024

Background, approach and summary

Research objectives and approach

The ‘state of the nation’ looks at customers’ general views and behaviours with regards to household finances, their concerns both at a national and regional level, expectations of brands and the environment.

The research sought to answer the following objectives:

1. Customers’ key concerns and what’s important to them
2. Household finances and concerns around meeting bill payments
3. Changes in water usage in the home
4. Expectations of brands
5. Environmental attitudes and behaviours

Certain aspects of the survey were previously run on WaterTalk; responses have been tracked where comparable.

What we did:

- A 20-minute quantitative survey with 1,000 customers
- Fieldwork took place 15th March – 9th April 2024
- Customers were recruited from the ‘In the Flow’ panel and from an external access panel.
- Data has been weighted to be representative of the United Utilities customer base.
- Details of the sample can be found in the appendix.

What external factors were affecting consumers during fieldwork?

Fieldwork dates: 15th March – 9th April 2024

Spring 2024 budget

THE TIMES

Spring budget 2024 key points: a summary of the highlights

Fall in inflation

Evening Standard

'Inflation in the UK will be too low for the next three years', top economists say

Political disruption

the guardian

Both Labour and group of Conservative MPs say Lee Anderson defection highlights Tory failings – as it happened

Reform UK confirms Lee Anderson, former Conservative MP and ex-deputy chair, has defected to join party ...

Ongoing conflict

sky NEWS

Israel-Hamas war: Three Britons killed in Gaza named, as IDF says 'misidentification' led to deadly airstrike

The Britons are among seven aid workers who died after a convoy they were travelling in was hit as it was leaving a warehouse ...

Water sector

The Telegraph

Sewage dumping at bathing spots up nearly 50pc in a year

Lib Dems accuse water companies of 'environmental vandalism' and declare scandal 'cannot be allowed to continue'

Minimum wage increase

BBC

Minimum wage rise gives boost to 2.7 million lowest-paid

The minimum wage set by the government, known as the national living wage, is increasing by more than a pound for the first ...

Executive summary

Executive Summary

Financial concerns remain the most important, with higher concern seen in health and infrastructure

- Northwest specific concerns noted a significant 12% increase in concern for the condition of roads.
- Issues relating to the country overall remain mostly stable, with health concerns significantly increasing since October 2023.
- The importance of "keeping on top of my finances" (64%) remained consistent with October 2023 findings (61%).
- Discretionary income significantly increased in relation to 'we have more money left'. However, 48% still felt they have less money left (a significant decrease from 52% in October 2023).
- This decline in economic/financial concern continues to reflect national trends and a continued reduction in the consumer price index.

Environmental concerns remain stable, but customers behaviors are more pro-green

- When asked to rank what United Utilities should prioritise tackling first, 'keeping bills low' remained the most common option to be ranked in the top 3. However, 'preventing pollution' was significantly more likely to be in the top 3 among those in Cumbria, and those aged 60-69.
- On an unprompted basis, the most common theme was 'stop sewage leakage/water pollution'. This was expressed by 19%, surpassing the 17% that mentioned 'cheaper bills…' which was the most common in October 2023.
- While overall concern of environmentalism was stable, environmental behavior agreement increased significantly across 'I try to recycle as much as I can' and 'I do everything I personally can to help the environment' for example.

As discretionary income is improving, higher importance is seen with non-financial aspects such as lifestyle

- As household discretionary income improves, a significant growth in 'making sure I eat a healthy, balanced diet' and 'making sure I get enough exercise' was noted, with less of a focus on 'keeping on top of my finances'
- The improvement in discretionary income may relate to the continued growth in previous waves for 'I'm already doing / will definitely do' budgeting and spending behaviours, as well as a reduction in CPI over the previous 6-months.
- However, worry in relation to council tax increased significantly since October 2023, aligning with record 5% increases in 3/4 of councils across England.

Executive Summary

The reduction in financial concerns relates to environmental expectations of companies

- In line with reduced economic/financial concerns, expectations of companies saw significant uplifts for actions that are often associated with a cost to the consumer. For example, reducing their impact on air pollution.
- Although environmental expectations of companies increased, important issues relating to the Northwest saw a minor reduction in environmental concerns since October 2023, in contrast to a significant uplift in infrastructure issues.
- This pivot in respondent expectations is noted in company innovation recall. With ‘brands offering financial incentives/benefits’ no longer present in the top three themes, while environmental innovation remains.

94% of customers were aware that flushing items, such as baby wipes, can lead to blockages

- 60% of United Utilities customers expressed that they have not disposed of any items down the toilet, drain or sink that they should not have. The majority of options remain consistent, while condoms seen a significant increase in ‘flushing’
- Awareness of the consequences returns results consistent with the previous wave, with 94% of customers aware that this would lead to a ‘blocked drain / system’. A minority of customers also mentioned flooding, fatbergs specifically, increased costs, waterway pollution, and environmental damage as consequences of irresponsible disposal.

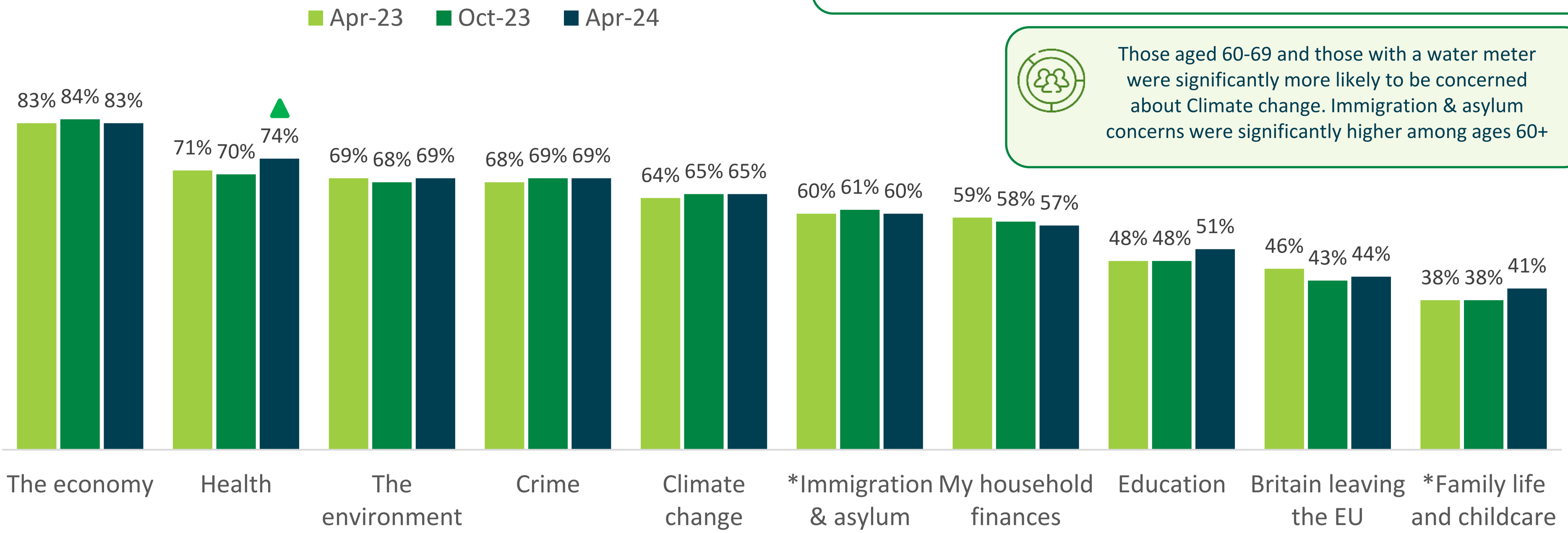
Customers want more communication from United Utilities across almost all options

- 68% of customers would like information how they can ensure good water quality in their home, a 2% uplift since October 2023.
- Tips on what items not to put down the toilet or sink / drain saw a significant increase since October 2023, with 48% interested in communications related to this.
- This increase in communication interest relates to the most common theme when asked about company innovation was ‘customer service, communication, and customer education’. Signalling a desire for updates and further information from companies to compliment the customer experience

Customer Mindset

The majority of customers (83%), continue to be primarily concerned with the economy. All other options remain stable with health seeing a significant increase to 74% this wave.

Current concerns (Very / quite concerned)



An Office for National Statistics report* found that real wages increased 1.4% between November-January 23/24, consistent with the previous three-month period (August-October 2023).

Those aged 60-69 and those with a water meter were significantly more likely to be concerned about Climate change. Immigration & asylum concerns were significantly higher among ages 60+

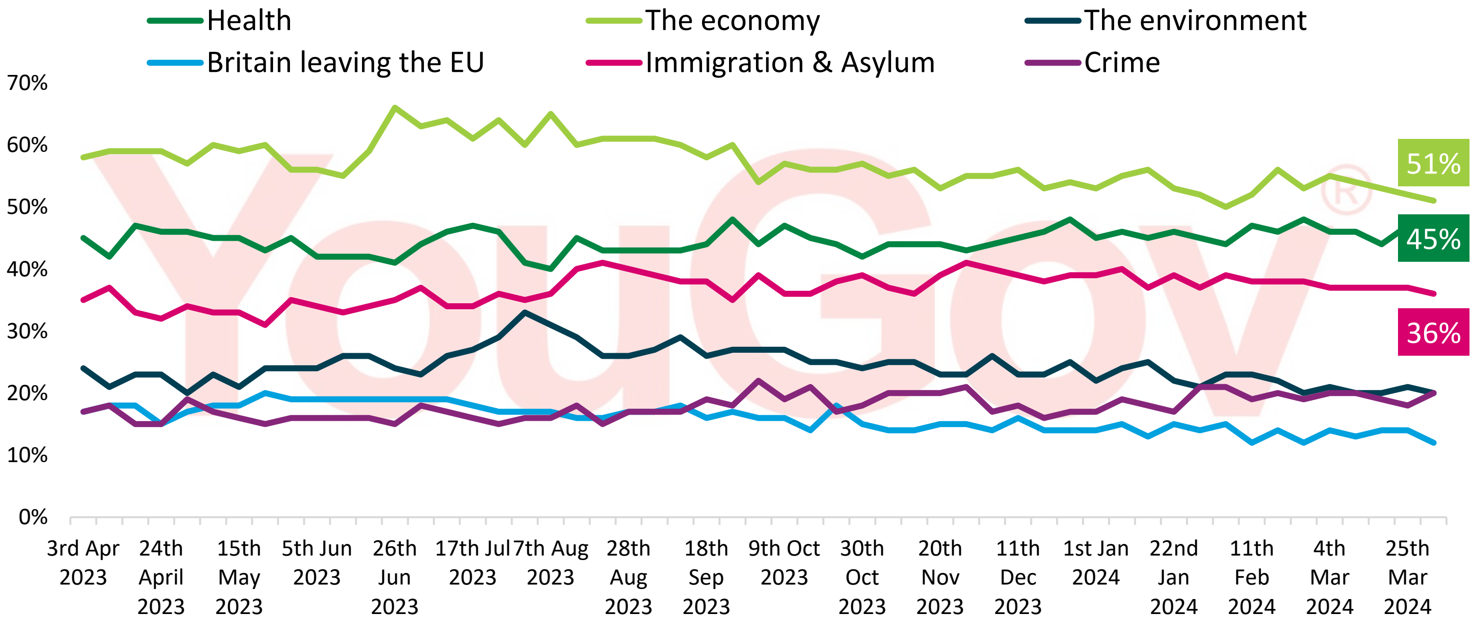
Q1. Thinking about the country as a whole, to what extent are you concerned about the following issues at this time?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)
Source: https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/averageweeklyearningsingreatbritain/october2023

Significant difference at 95% CI

The economy, although still the most important issue, has seen a 7% decline since October 2023, while crime and immigration have seen increases in this period.

In the YouGov data we don't see the same increase in health as we have noticed in the North West. Looking at the timeline and analysing YouGov data on some of the other influencing issues, we see housing increasing in importance, with a 4% increase from October 2023 to March 2024, an issue to be monitored and potentially included in future waves.

Important issues facing the country – YouGov data



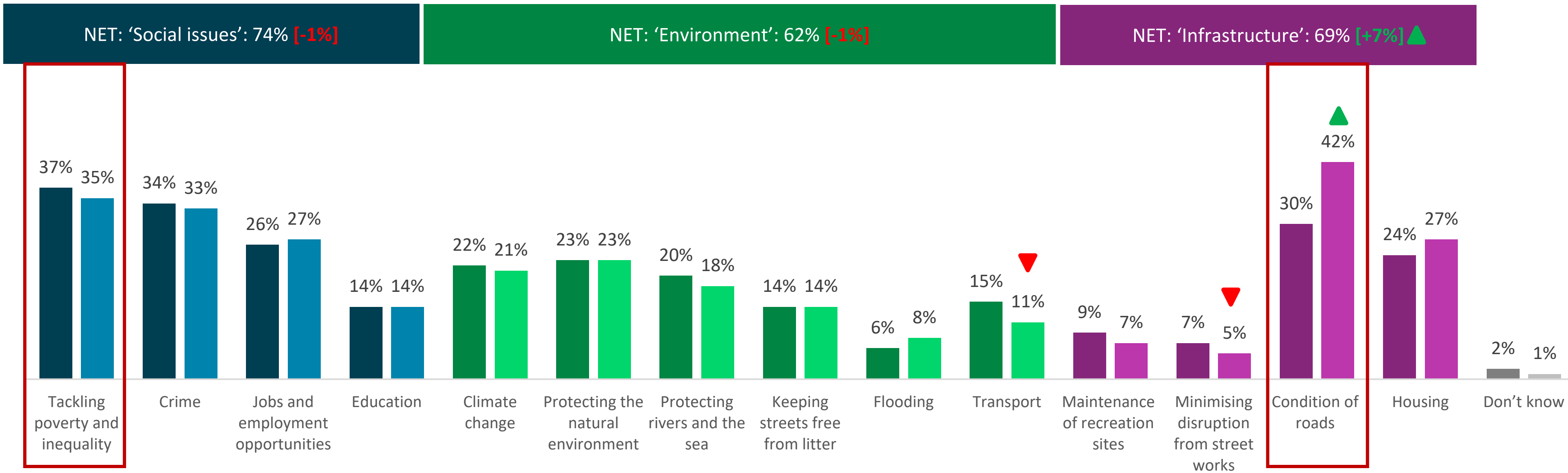
Issues	Diff vs. Oct 2023
Economy	-7%
Health	0%
Environment	-4%
Immigration	+1%
Leaving EU	-5%
Crime	+3%

Source: YouGov tracker
https://yougov.co.uk/topics/politics/trackers/the-most-important-issues-facing-the-country?period=1yr

In the North West infrastructure is more important, specifically in relation to the condition of roads which has significantly increased by 12%. Social and environmental concerns have remained stable.

Current concerns – North West specifically

Customers in Cumbria and those aged 60+ were significantly more likely to select environmental issues, with 60–69-year-olds also significantly more likely to select social issues



Darker bars are October 2023; Lighter bars are April 2024

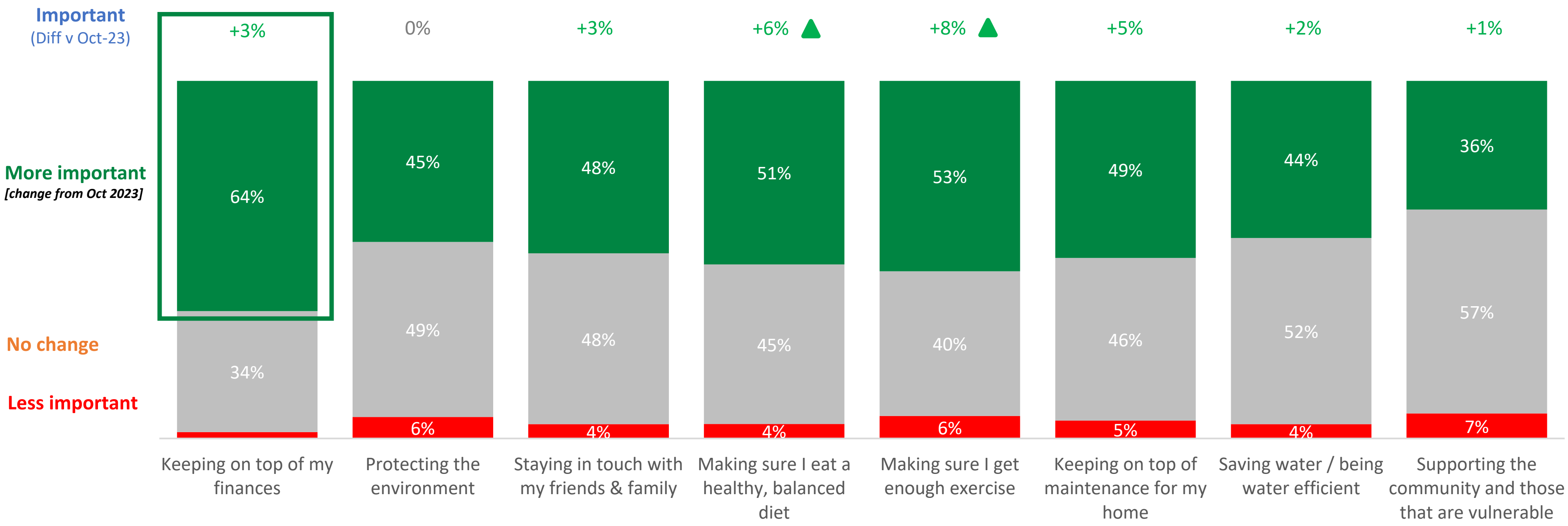
Q2. Now thinking specifically about the North West, which of the following do you think are the most important issues at this time? Please select up to three.
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

Customers continue to say financial management is still most important to them; healthy behaviours like eating a balanced diet and getting enough exercise are more important right now.

Important aspects – change in L6M

Those aged 18-29 and females were significantly more likely to see 'keeping on top of my finances' as more important over the last 6 months.

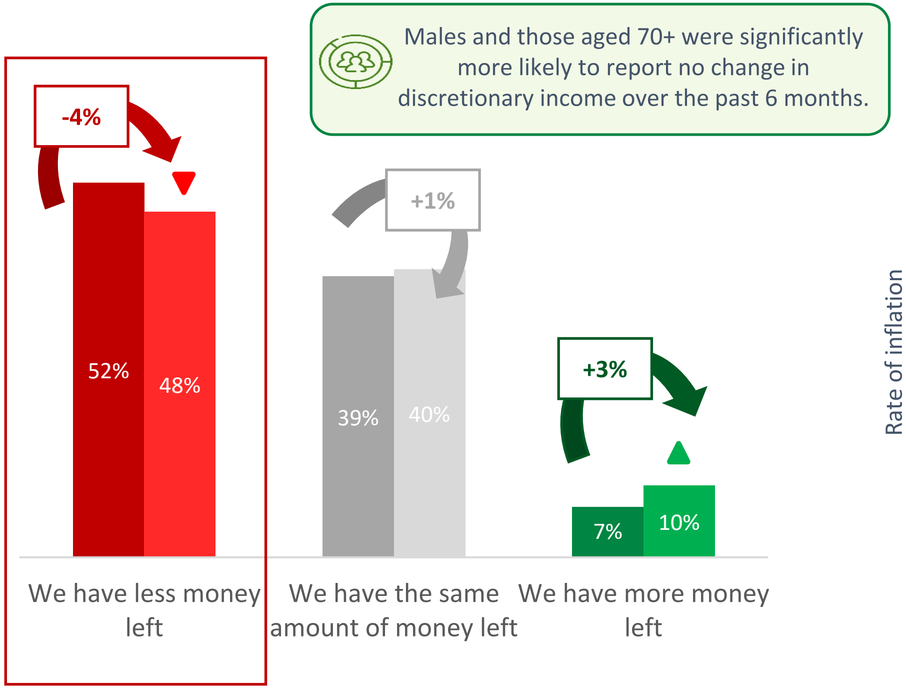


Q4. Over the last 6 months, would you say the following aspects have become any more or less important to you?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

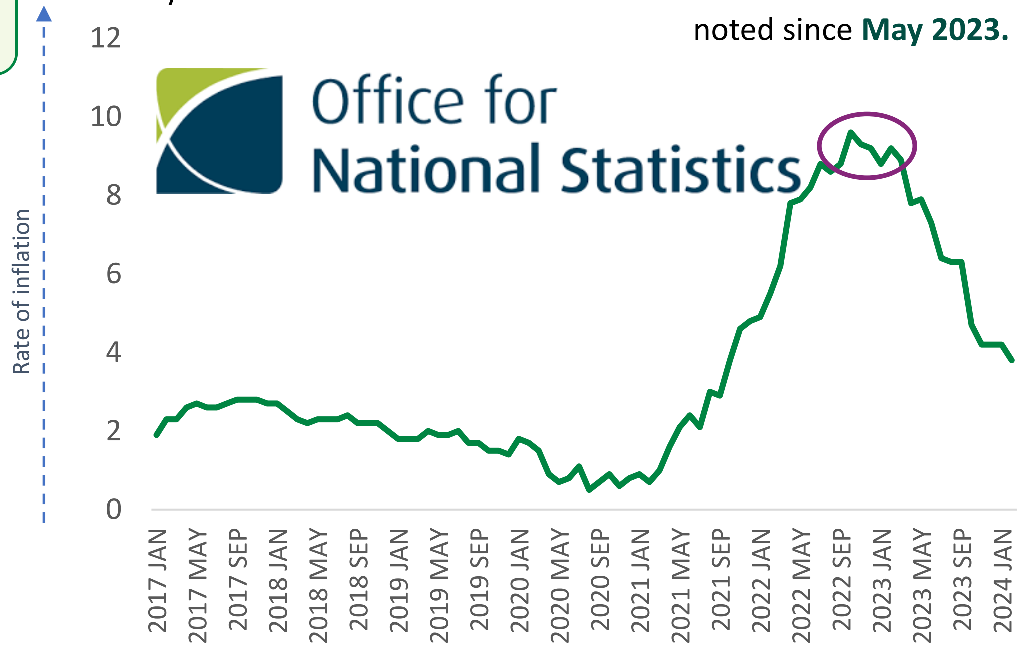
Customers are still indicating that they have less discretionary income, however there are slow signs of recovery with more customers stating they 'have more money left', correlating with the decrease in inflation.

Household discretionary income



Darker bars are October 2023; Lighter bars are April 2024

The ‘**Consumer Price Index**’, an index of the variation in prices for a representative basket of retail goods and services, ROSE by 3.2% in the **12-months to March 2024**. A trend of decline is noted since **May 2023.**



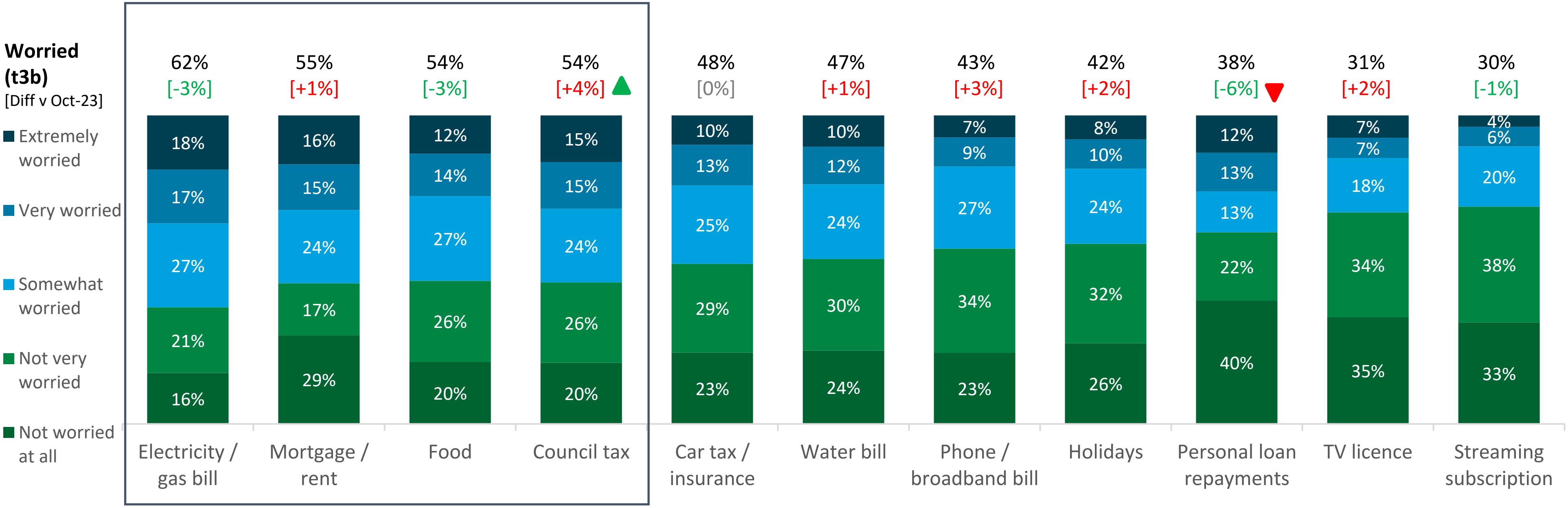
Q8. How have each of the following changed for you compared to 6 months ago?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024), https://www.ons.gov.uk/economy/inflationandpriceindices/bulletins/consumerpriceinflation/march2024

Significant difference at 95% CI

Utility bills remain the highest area of worry at 62%. Worry relating to Council tax saw a significant increase since October 2023, while personal loan repayments saw a significant decrease in the same period.

Concern about meeting household bills

Those aged 60+, have a water meter, and are male, were significantly less likely to be worried about paying their electricity / gas bill.



Q5. Which, if any, bills or costs are you worried about paying?
Base: April 2024 (excludes those who said 'not applicable – based varies per bill; (n=529-992)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

The majority of bills show a continued trend of decline since their peaks in Sep-22. However, mortgage/rent, car tax/insurance and streaming subscriptions indicate a trend of slight increase WoW.

Concern for meeting bills (Net: Worried)

Concern for meeting bills (NET: Worried - T3B)	Apr-20	Mar-21	Sep-21	Apr-22	Sep-22	Apr-23	Oct-23	Apr-24	Diff vs Oct-23
Electricity / gas bills	21%	28%	56%	84%	88%	74%	65%	62%	-3%
Food	21%	27%	38%	61%	72%	74%	57%	54%	-3%
Council tax	N/A		36%	60%	60%	58%	50%	54%	4% ▲
Water bill	21%	21%	33%	52%	58%	46%	46%	47%	1%
Mortgage / rent	22%	19%	28%	50%	57%	52%	54%	54%	0%
Car tax / insurance	21%	18%	27%	45%	50%	45%	48%	48%	0%
Personal loan repayments	15%	22%	21%	43%	50%	44%	44%	38%	-6% ▼
Holidays	24%	21%	21%	42%	49%	43%	40%	42%	2%
Phone / broadband bill	19%	20%	26%	44%	47%	45%	40%	43%	3%
TV licence	17%	14%	20%	32%	34%	35%	29%	31%	2%
Streaming subscription	11%	12%	13%	27%	33%	27%	31%	30%	-1%

***Wave-on-wave differences driven by younger sample in April 2022**

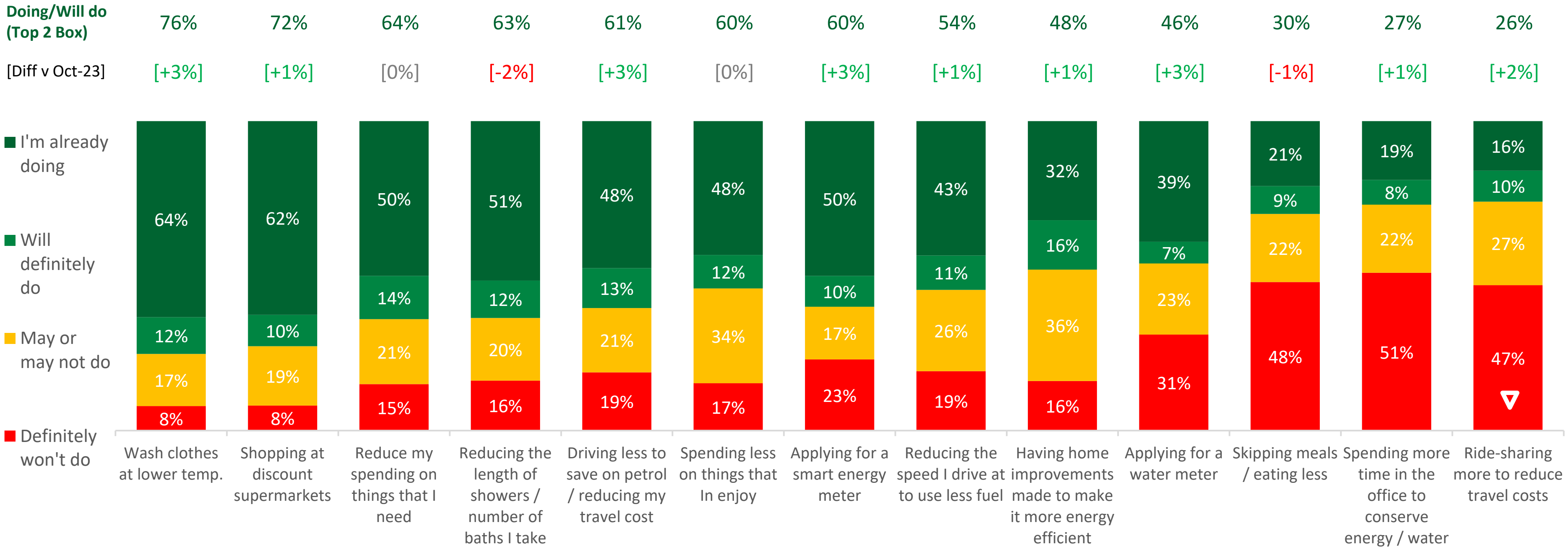
Q5. Which, if any, bills or costs are you worried about paying?
Base: April 2024 (excludes those who said 'not applicable – based varies per bill; (n=499-996)
Source: State of the Nation (April 2024)

▲▼ Significant difference at 95% CI

Doing/Will do has seen marginal increases across most options. Ride-sharing returned a significant decrease in customers responding ‘definitely won’t do this’ since October 2023.

Behaviour change to save money

Those aged 60-69 were significantly more likely to already be washing clothes at lower temperatures, with 76% expressing this.

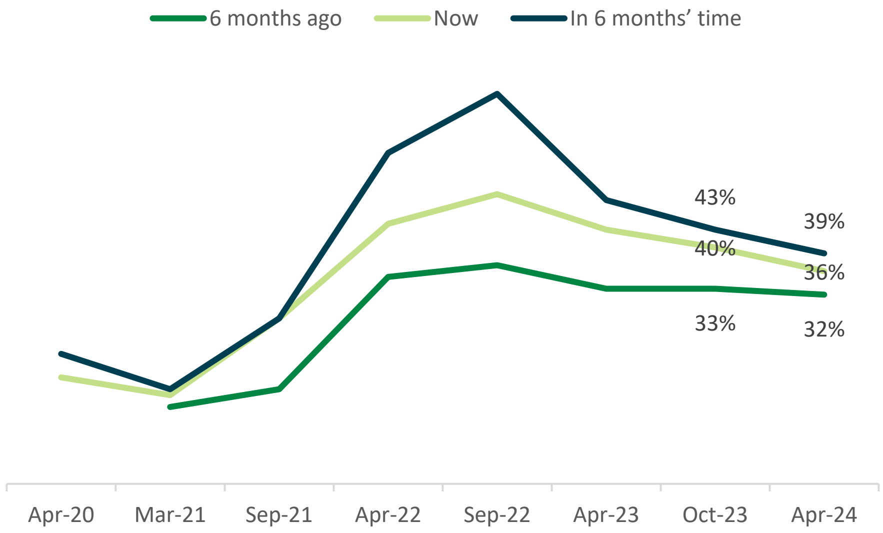


Q8a. To what extent are you doing any of these this year in relation to your budgeting and spending?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

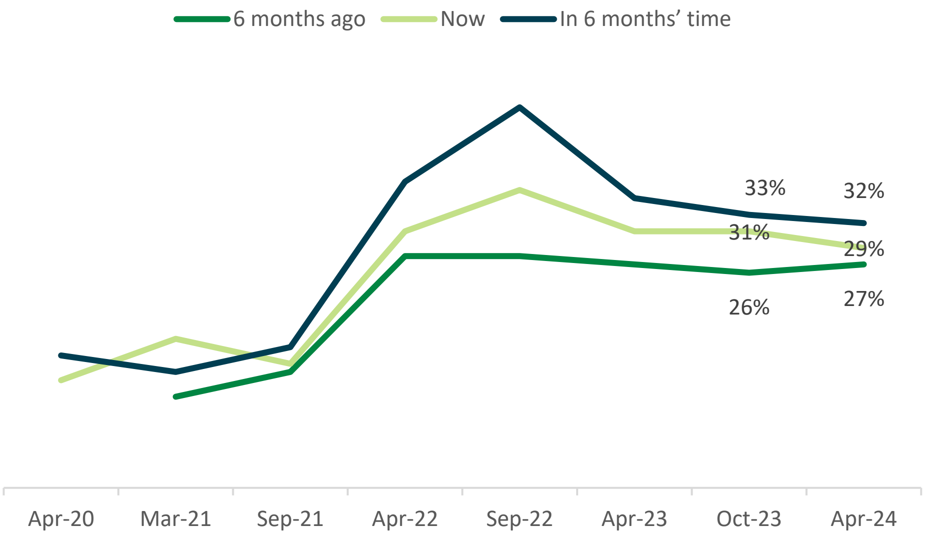
Significant difference at 95% CI

Customers are finding it less difficult to meet monthly bill payments, showing a steady decline. Meeting water bill payments has remained consistent over the last two waves.

Difficulty with meeting monthly bill payments (general)



Difficulty with meeting monthly bill payments (water)



***Wave-on-wave differences driven by younger sample in April 2022**

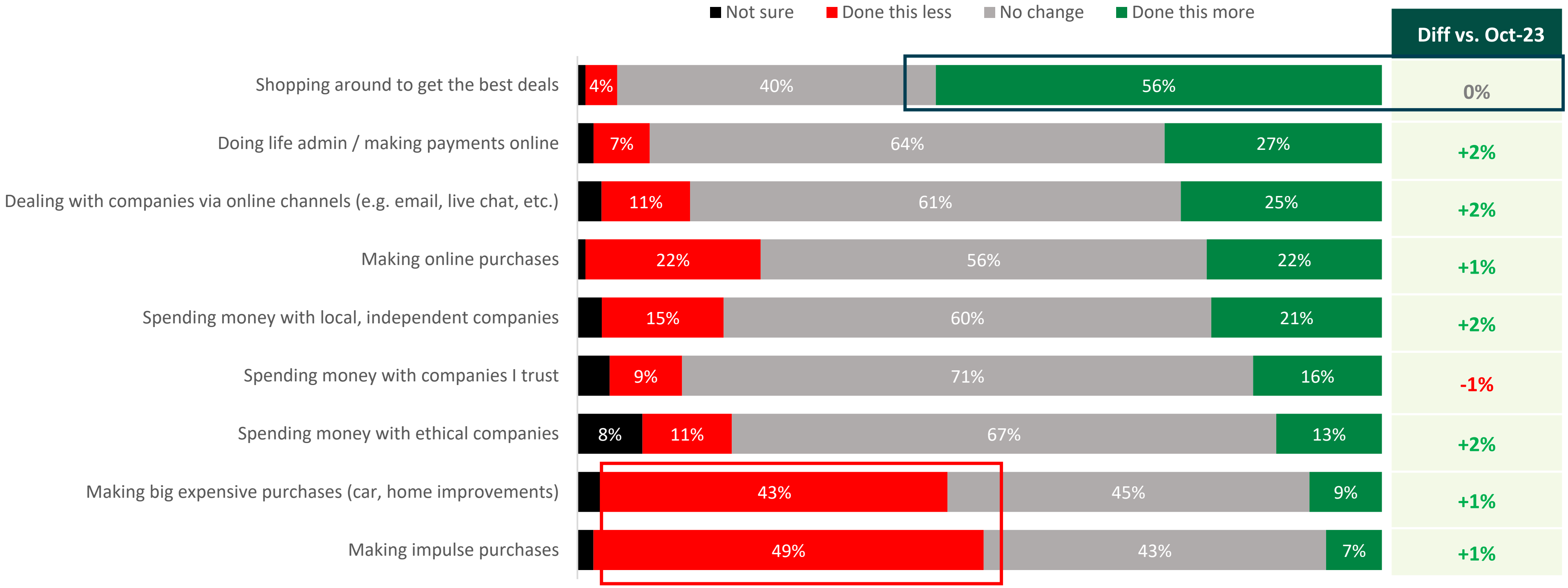
Those with a water meter in their home and males were significantly more likely to express that their water bill will be not at all difficult to pay in 6 months time

Q6. How difficult would you say it is for your household to meet the monthly payments on your bills?
Q7. And, specifically, how difficult would you say it is for your household to pay your water bill?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

In the past 6 months, behaviors have remained stable, with no significant changes across all options. Shopping around to get the best deals remains the most popular opinion, with 56% doing this more in the past 6 months.

Changes in shopping behaviour vs. 6 months ago



Q8. How have each of the following changed for you compared to 6 months ago?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

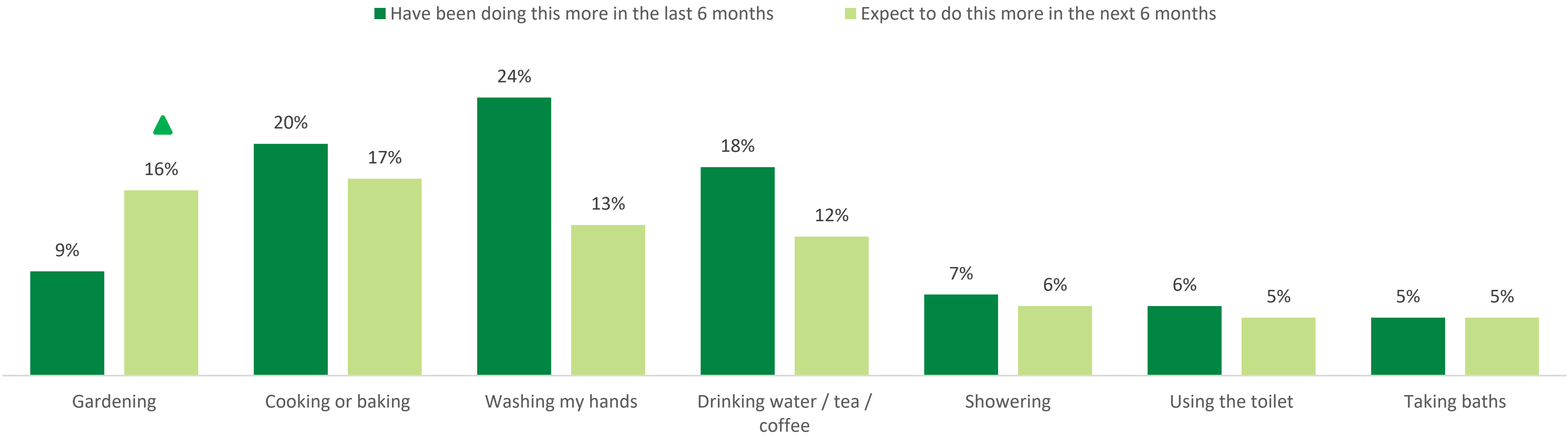
Significant difference at 95% CI

Lifestyle & water usage

With weather likely to improve within the next 6 months, customers expect to reduce the majority of water-related activities with the exception of gardening.

Time spent doing activities – 'spent more time L6M / N6M' [water activities]

Oct-23	11%	8%	18%	16%	24%	14%	15%	11%	6%	7%	5%	5%	4%	5%
[Diff]	[-2%]	[+8%]	[-2%]	[+1%]	[0%]	[-1%]	[+3%]	[-1%]	[+1%]	[-1%]	[+1%]	[0%]	[+1%]	[0%]

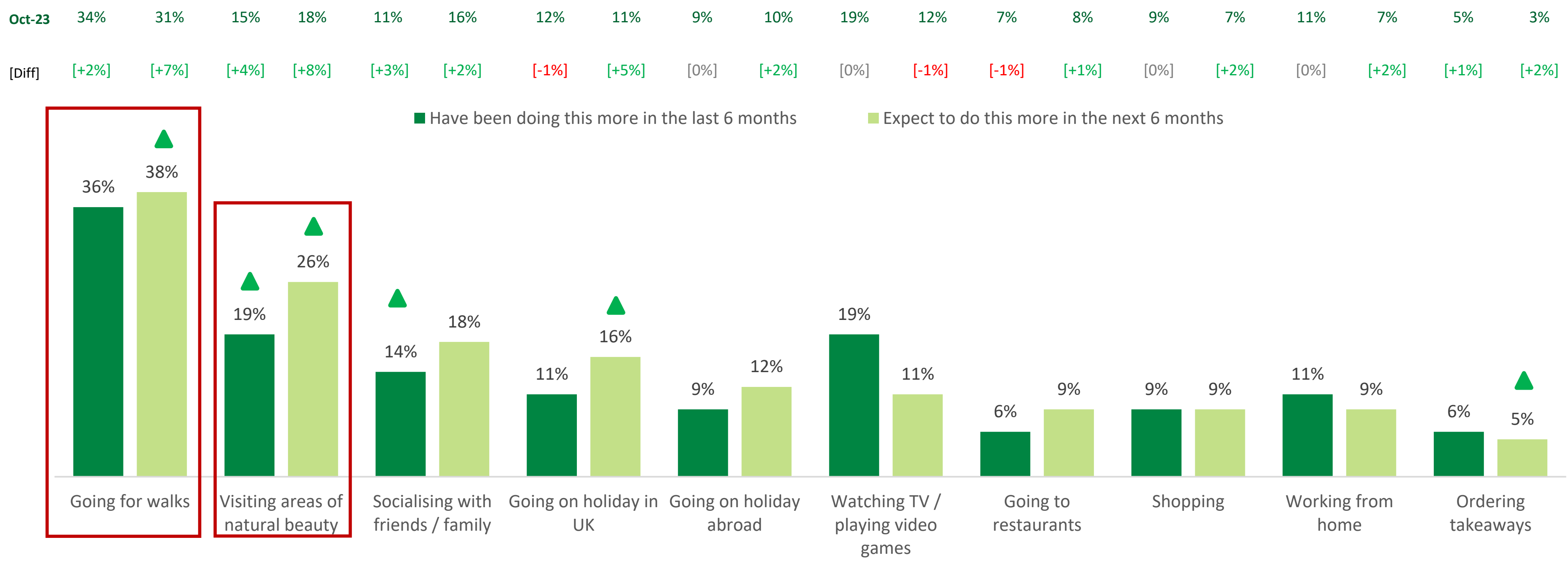


Q10. Which of the following have you been spending more time doing or doing more often in the last 6 months?
Q11. And, which of the following do you expect to spend more time doing or doing more often in the next 6 months?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

In terms of non-water activities, customers expect to be doing more walking, socialising, going on holiday, with visiting areas of natural beauty seeing the largest increase (+8%).

Time spent doing activities – 'spent more time L6M / N6M' [non-water activities]



Q10. Which of the following have you been spending more time doing or doing more often in the last 6 months?
Q11. And, which of the following do you expect to spend more time doing or doing more often in the next 6 months?
Base: April 2024 ((n=1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

Moist toilet tissue wipes remains the most common item flushed. We also saw marginal differences in items being flushed since October 2023.

Items disposed of down toilet, sink or drain in last 6 months

Hygiene / Personal care

		Difference vs. Oct 2023
Moist toilet tissue wipes	14%	0%
Tissues (not toilet tissues)	12%	0%
Tampons	4%	0%
Baby wipes	3%	0%
Dental floss	3%	0%
Cotton pads, cotton buds	2%	-1%
Cigarettes	2%	-1%
Make-up wipes	2%	-1%
Period pads / liners	2%	0%
Condoms	2%	1% ▲
Contact lenses	1%	-1%
Plasters	1%	-1%
Nappies	0%	0%
Bladder weakness products	0%	N/A

Cleaning

		Difference vs. Oct 2023
Cleaning / disinfectant wipes	3%	0%
Contents of vaccum cleaner	1%	0%

Kitchen

		Difference vs. Oct 2023
Cooking fats / oils	6%	-1%
Food waste	6%	-1%
Kitchen towel	4%	-1%

Pet

		Difference vs. Oct 2023
Pet hair / human hair	12%	0%
Pet mess	5%	0%
Pets that have passed away	0%	-1% ▼

60%
haven't disposed of any of the above via toilet, sink or drain in the last 6 months.

Q12. Which, if any, of the following items have you disposed of down the toilet or sink/drains in the past 6 months?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

▲▼ Significant difference at 95% CI

Encouragingly, 94% of respondents can correctly identify the consequences of incorrectly disposing down toilet, sink or drains. This is an increase from 85% in October 2023.

Consequences of disposing products down toilet, sink or drain (themes from open-ends)

7%

*Drains get blocked and if serious enough, could cause local **flooding**. Costs United Utilities money to fix problems caused by blocked drains. This will, in turn, increase my water bill*
***Female,** 60-69*

3%

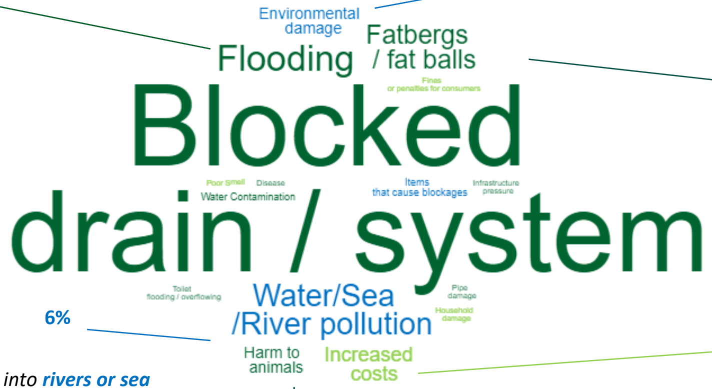
*Blockages, problems at the water plant and subsequent **environmental** and health issues as well as unnecessary costs*
Male, 70+

5%

*Blocked main drain blockage there are massive **fat burger** in a lot of drains*
***Male,** 60-69*

94%

*Will cause **blockages** further along the drain system*
***Male,** 60-69*



6%

*Blocked sewers and / or eventually being emptied into **rivers or sea***
Female, 70+

4%

Blocking drains which are owned by United Utilities but when they need replacing or repairing I, the customer pay more
Male, 40-49

3%

*They may clog up the drainage system or with regards to **animals**: cause pollution or disease.*
Female, 50-59

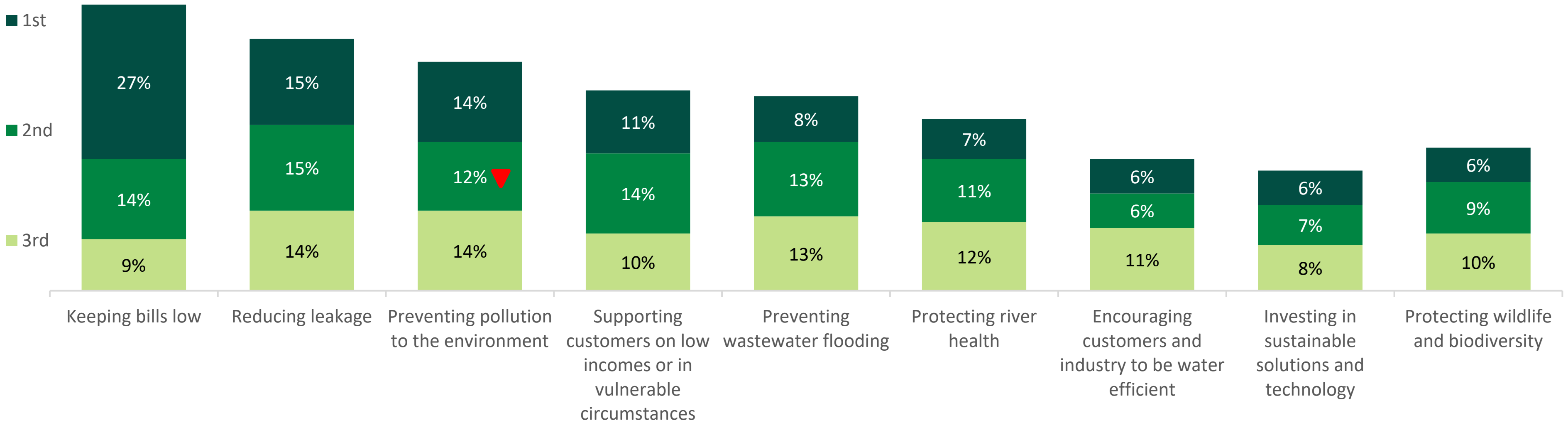
Q13. What do you think are some of the possible consequences of items being flushed or put down the drain when they shouldn't be?
Base: October 2023 (n= 1004) (Excluding nothing/don't know/N/A, and 'other' base is n=945, % is based off this figure)
Source: State of the Nation (October 2023)

Customer needs

Customers continue to call for United Utilities to prioritise keeping bills low, followed by reducing leakage and pollution to the environment.

Important issues for United Utilities to be tackling

Ranked top 3 [Diff v Oct-23]	Keeping bills low	Reducing leakage	Preventing pollution to the environment	Supporting customers on low incomes or in vulnerable circumstances	Preventing wastewater flooding	Protecting river health	Encouraging customers and industry to be water efficient	Investing in sustainable solutions and technology	Protecting wildlife and biodiversity
	50% [-2%]	44% [-1%]	40% [-3%]	35% [+3%]	34% [+2%]	30% [-2%]	23% [+2%]	21% [+3%]	25% [+2%]



Q28. Please rank the following issues in order of importance, where 1 = the issue United Utilities should prioritise tackling first.
Base: October 2023 (n= 1004)
Source: State of the Nation (October 2023)

Significant difference at 95% CI

Customers spontaneously mention that they would like United Utilities to stop sewage pollution. Although ranked second as priority, leaks was not in the top four spontaneous themes which was seen throughout 2023.

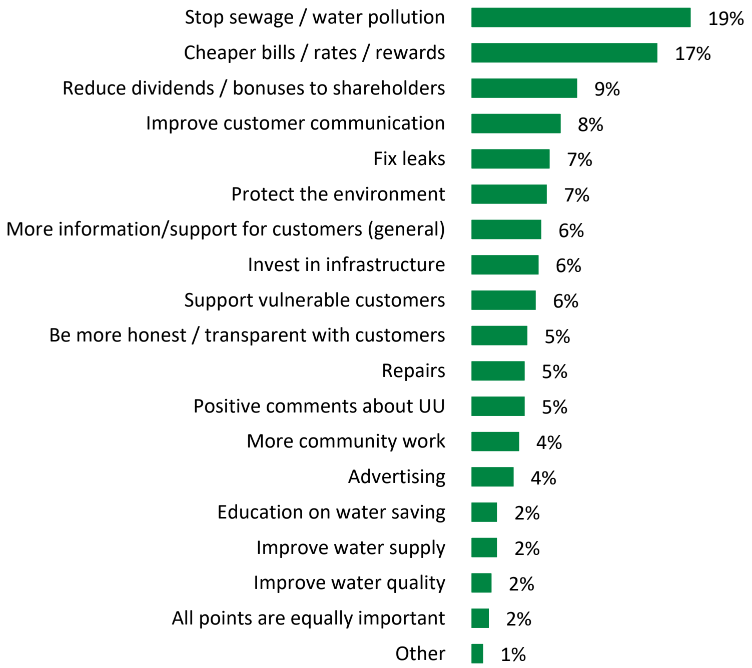
Additional requests of United Utilities (themes from open-ended responses)

Stop sewage /water pollution (c.19%)	Cheaper bills / rates / rewards (c.17%)	Reduce dividends / bonuses to shareholders (c.9%)	Improve customer communication (8%)
More transparent about sewage dumping ***Male, 40-49***	*Reward system for loyal customers* ***Female, 30-39***	*Reducing shareholder dividends and executive pay, abandon bonuses for high paid staff, ask to be re-nationalised* ***Male, 60-69***	*Effective communication with the people on services and products that interest them* ***Male, 30-39***
Stop dumping sewage & fix leaks instead of preaching to the public about not wasting water & polluting ***Male, 50-59***	*Lowering water bills and more help for low income families. Tips on how to be more water efficient* ***Male, 30-39***	*Focusing more on the needs of customers and the environment and less on shareholders* ***Male, 50-59***	*To send leaflets every other month so people remember what to do and don't forget* ***Male, 40-49***
Stop polluting our rivers and lakes now, and sort out the flooding at the Ellers allotment in Ulverston ***Male, 60-69***	*Reducing costs and passing savings on to customers* ***Male, 70+***	*Reducing bonus and dividend payment and using the money to invest in the infrastructure* ***Male, 70+***	*Informing what UU are doing in local area, I.e maintenance works* ***Female, 18-29***

Q17. Is there anything else you'd like to see United Utilities doing more of?
Base: April 2024; Coded themes from n=1000 open-ended responses (Excluding nothing/don't know and 'N/A, base is n=411, % is based off this figure)
Source: State of the Nation (April 2024)

Stopping sewage and water pollution is the top answer and has increased 8% since October 2023.   Cheaper bills / rates has remained consistent in second place. Fixing leaks has seen a drop from 2nd to 5th place.

Additional requests of United Utilities (coded themes from open-ended responses)

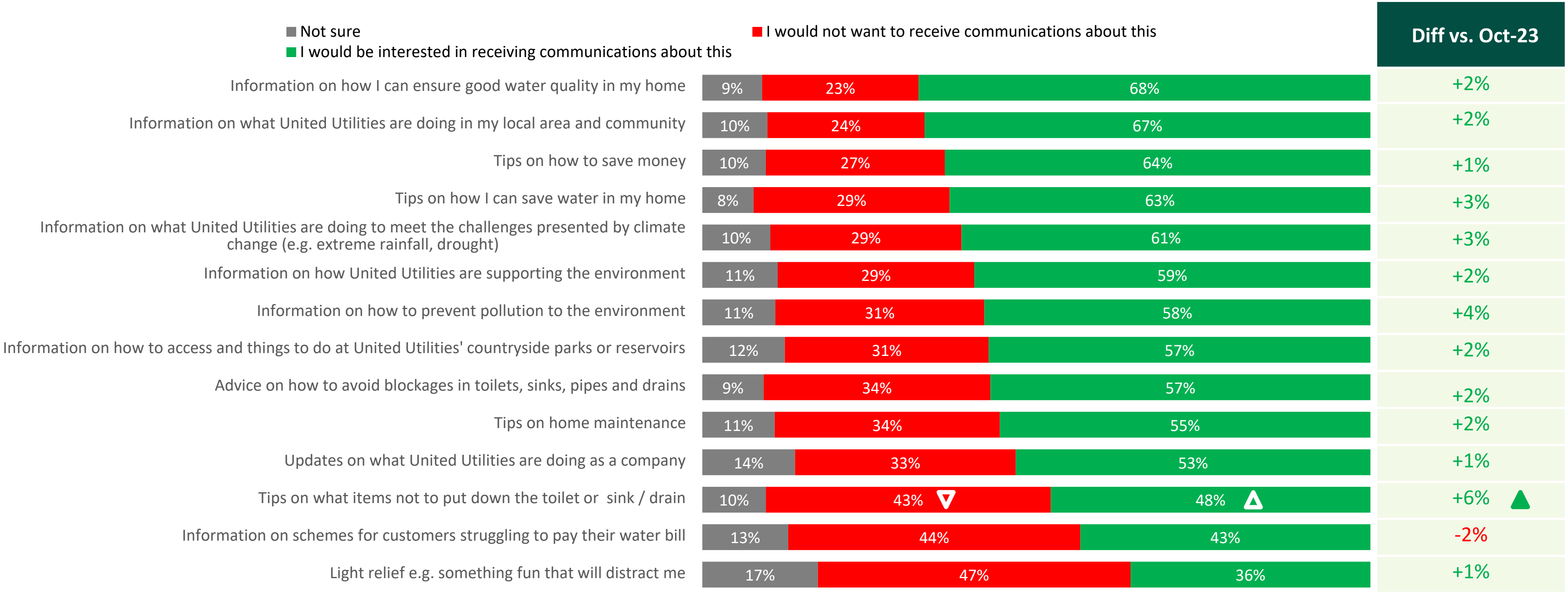


Q17. Is there anything else you'd like to see United Utilities doing more of?
Base: April 2024; Coded themes from n=1000 open-ended responses (Excluding nothing/don't know and 'N/A, base is n=411, % is based off this figure)
Source: State of the Nation (April 2024)
All codes 1% or less have been omitted

Tips on how I can ensure good water quality in my home continues to be the most important. Tips on what items not to put down the toilet sink/drain have seen a significant increase this wave.

Interest in receiving comms from United Utilities

Those with a water meter were significantly more likely to be in favour of receiving communication across the majority of response options, consistent with October 2023 findings.



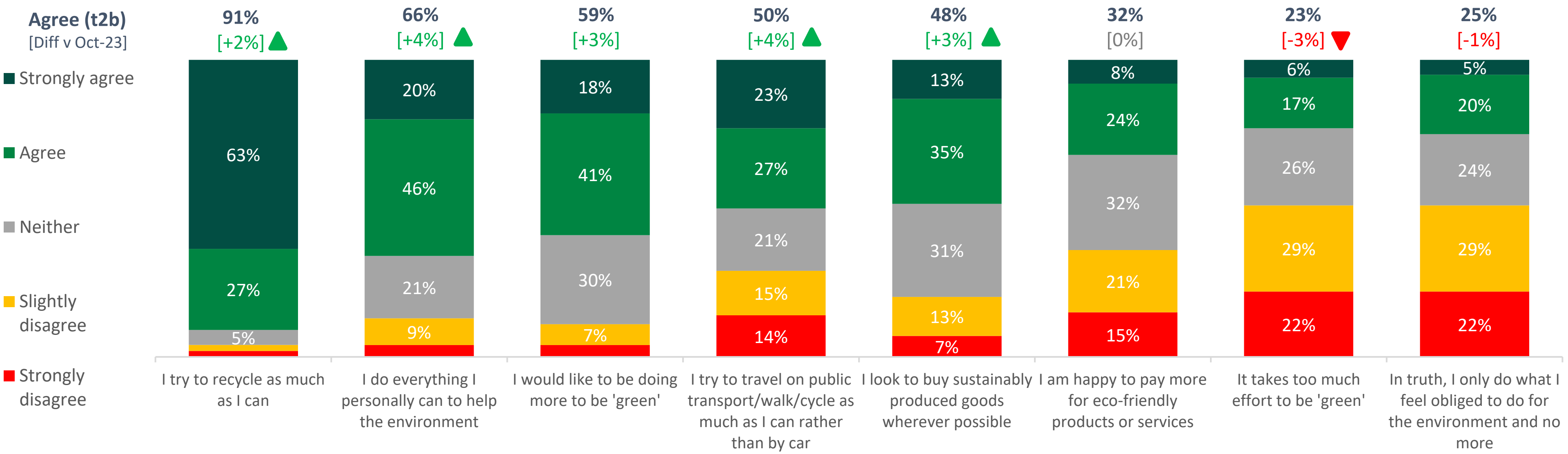
Q16. Which of the following types of communications would you be open to receiving from United Utilities during this time?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

Over 9 in 10 customers try to recycle as much as they can. The majority of options noted significant increases this wave, with ‘it takes too much effort to be ‘green’ significantly declining in this period.

Attitudes toward the environment

Those aged 18-29 were significantly more likely to agree that they only do what they feel obliged to do for the environment, that it takes too much effort to be ‘green’, and that they are happy to pay more for eco-friendly products or services.

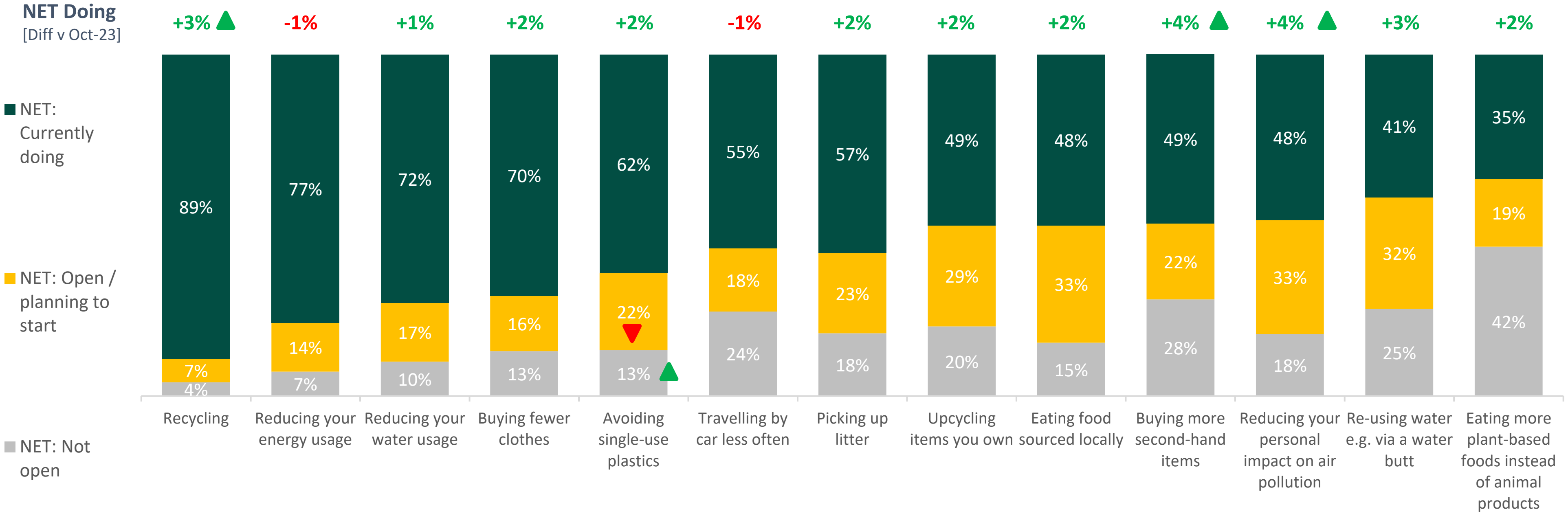


Q18. How much do you agree or disagree with the following statements?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

Recycling and reducing energy usage are still key green behaviours. Female respondents and those aged 70+ are significantly more likely to recycle.

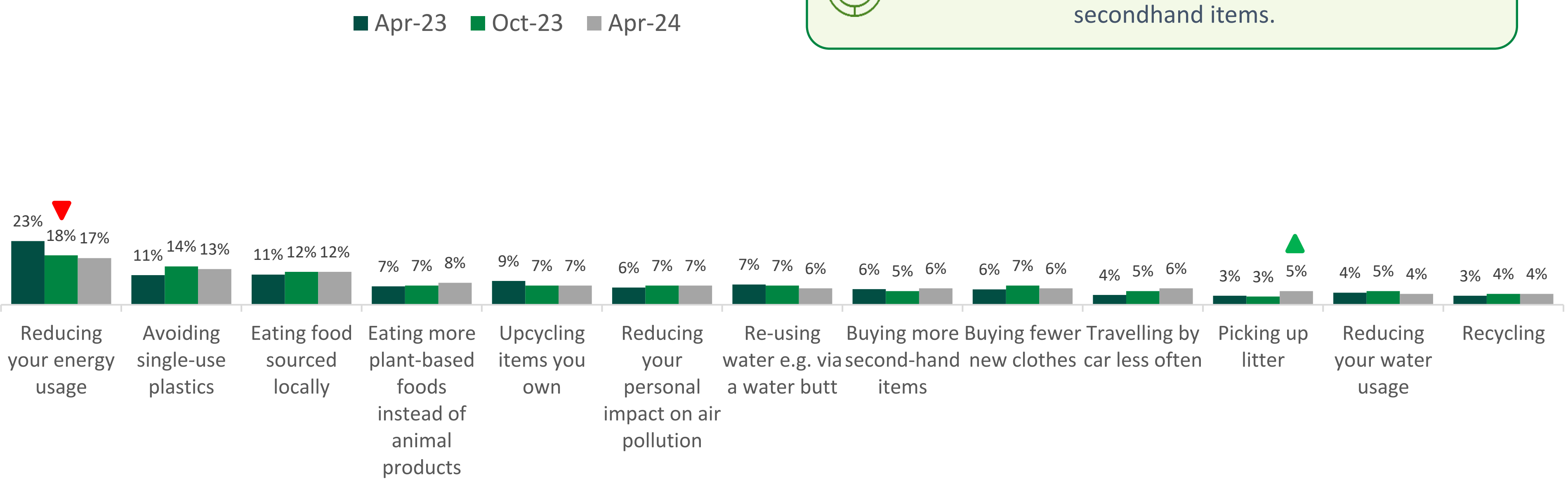
Engagement in pro-environmental behaviours



Q19. How would you describe your behaviour towards each of the following sustainable activities?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

There have been no significant changes in regards to customers interests, picking up litter has seen a slight increase in comparison to October 2023.

Interest/passion in pro-environmental behaviours



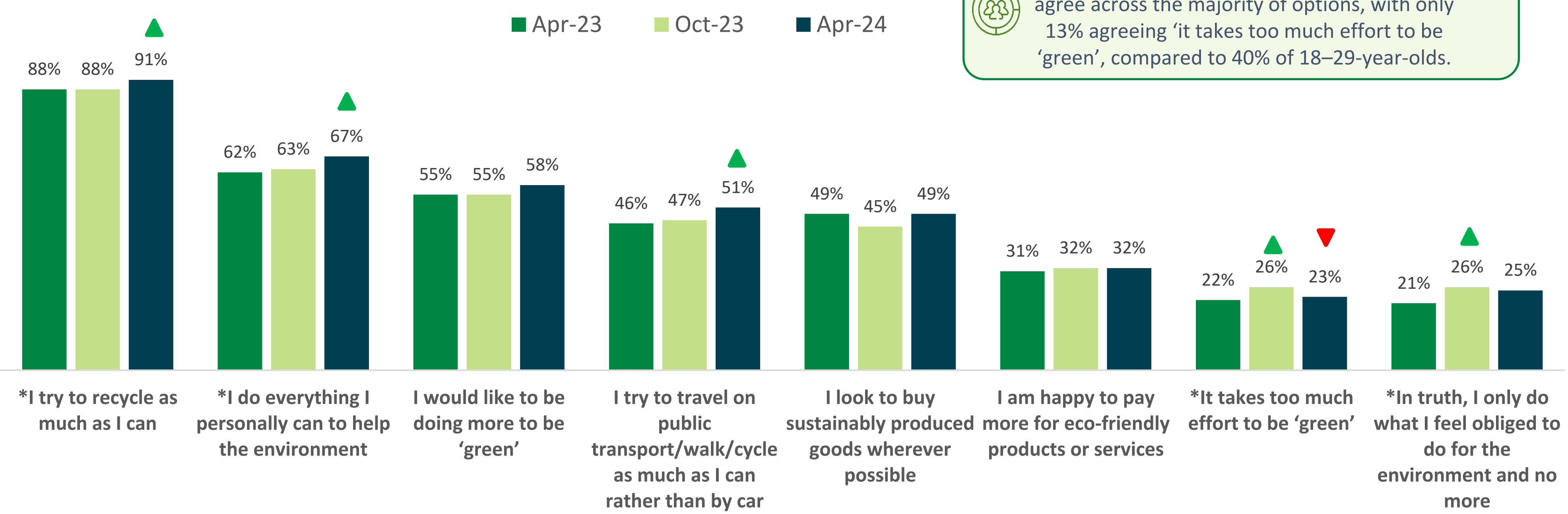
Females were significantly more likely than males to be most passionate about buying more secondhand items.

Q20. And which of the following are you most interested in / passionate about?
Base: April 2024 (n= 875)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

This wave we see more customers claiming to be more engaged with environmentally conscious behaviours, by recycling and doing everything they personally can to help the environment.

Attitudes towards the environment (Strongly agree / somewhat agree)



Those aged 70+ were significantly less likely to agree across the majority of options, with only 13% agreeing 'it takes too much effort to be 'green', compared to 40% of 18–29-year-olds.

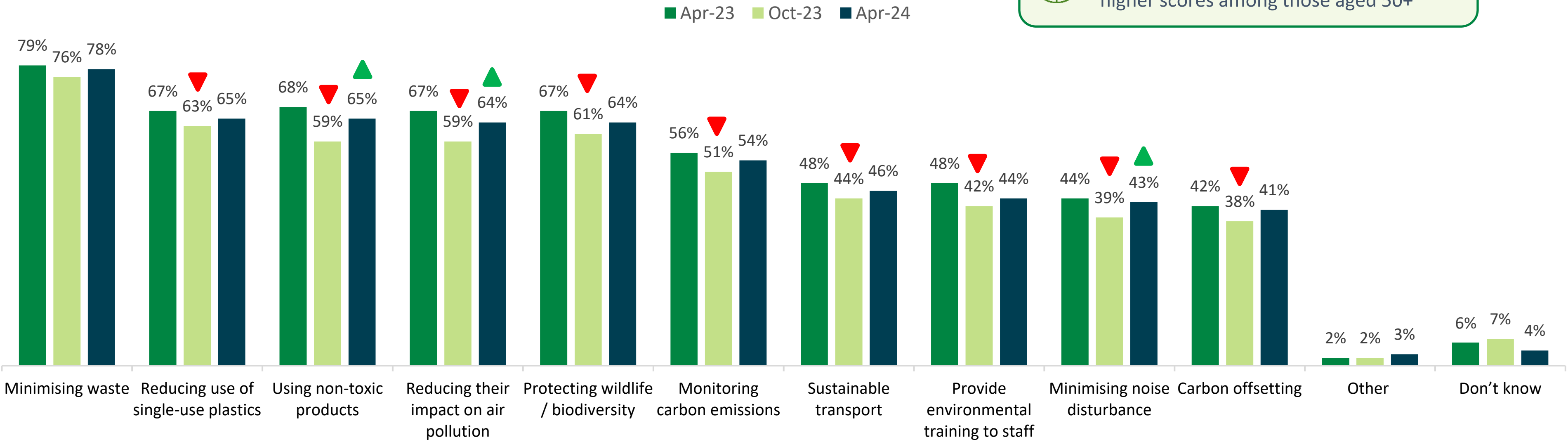
Q18. How much do you agree or disagree with the following statements?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

Customers expectations of companies have seen significant increases across ‘using non-toxic products’, ‘reducing their impact on air pollution’ and ‘minimising noise disturbance’.

Expectations of companies

Minimising waste and minimising noise disturbance was driven by significantly higher scores among those aged 50+



Q21. Which of the following would you expect companies to be doing as part of their standard operating procedures?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

Participants found that customer service and communication was a key area of innovation among companies in their experience(s) of innovation.

Brand innovation (open-ended responses)

Customer service, communication, and consumer education

I was on a flight and the cabin manager came up and talked to me. They knew my name, my travel history and it demonstrated they understood my needs and purchase history, previous issues etc
Male, 60-69

I think it's great that united utilities send you a text every time there is an outage in water, or they are doing repairs and keep you updated
Male, 60-69

My recent dealings with Apple were both very thorough and kept me in the loop about everything. They were extremely efficient and quick
Female, 40-49

User-centric design and ease of use

Wi-Fi connected washing machine so it can be used remotely and timed to wash at night
Male, 50-59

BMW - my car has automatic start/stop/steering so makes travelling on our congested roads so much easier - the car does it all
Male, 60-69

Amazon prime having multiple different streaming services you can buy on one site. Makes it easy to navigate all the shows you like in one place
Female, 18-29

Environmental sustainability and being eco friendly

I am always impressed by the way the Co-op cares for the community and environment and fair trade
Female, 60-69

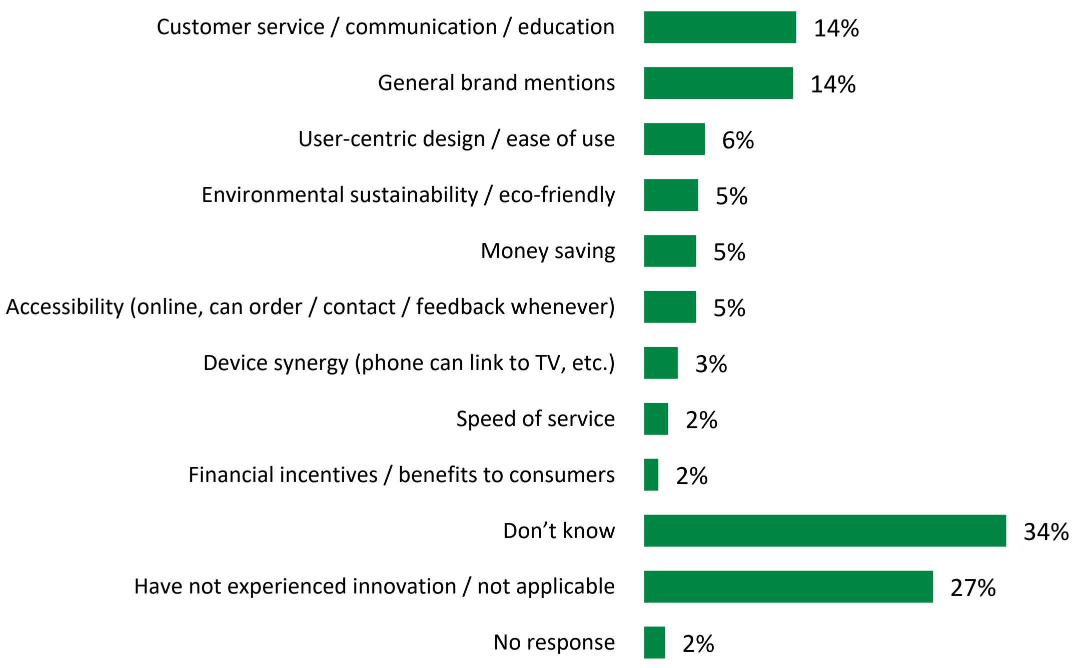
They made sketchbooks using sustainable and recycling paper, it's the current sketchbook that I used. They also gave me a pencil with seeds, and I could plant
Female, 60-69

An environmentally friendly company sent me their paperwork on seed paper printed with vegetable ink so that once I read it, I could plant it and it would grow - thereby meaning that could be sustainably done and would contribute to the environment. (We got some lovely wildflowers from)
Female, 50-59

Q15. Please tell us about a time when you experienced great innovation from a company and what made it so innovative?
Base: Aril 2024 (n= 917) (Excluding 'nothing/no/don't know and 'other-N/A / have not experience innovation, base is n=339, % is based off this figure)
Source: State of the Nation (April 2024)

Of those who could recall a brand innovation experience, the most popular themes were customer service / communication / education, and general brand mentions. 34% didn't know of an innovation, while 27% expressed they have not experience innovation.

Brand innovation (coded themes from open-ended responses)



Q15. Please tell us about a time when you experienced great innovation from a company and what made it so innovative?
Base: Aril 2024 (n= 917) (all responses displayed, % calculated from this)
Source: State of the Nation (April 2024)
All codes less than 1% have been omitted

Recap

Recap

Financial concerns remain the most important, with uplifts in health and infrastructure

Environmental concerns remain stable, but customers behaviors are more pro-green

Discretionary income is improving, with non-financial aspects growing in importance

The reduction in financial concerns relates to environmental expectations of companies

Responsible flushing and the consequences of this remain consistent with October 2023

Customers want more communication from United Utilities across almost all options

Appendix

Data statement

Note on analysis

There is a very small portion of In the Flow community members who do not have demographic information available due to missing profile data. These have been classified as 'prefer not to say' and 'other'.

In order for the sample to meet quotas on the external panel which are representative of United Utilities customers, this group has been down weighted to a miniscule amount, so that when figures are rounded to whole numbers, they equal zero. All other customers meet the quota and equal the proportions specified. As an effect of weighting, some subgroup base sizes may not equal the total base displayed, to a minor extent.

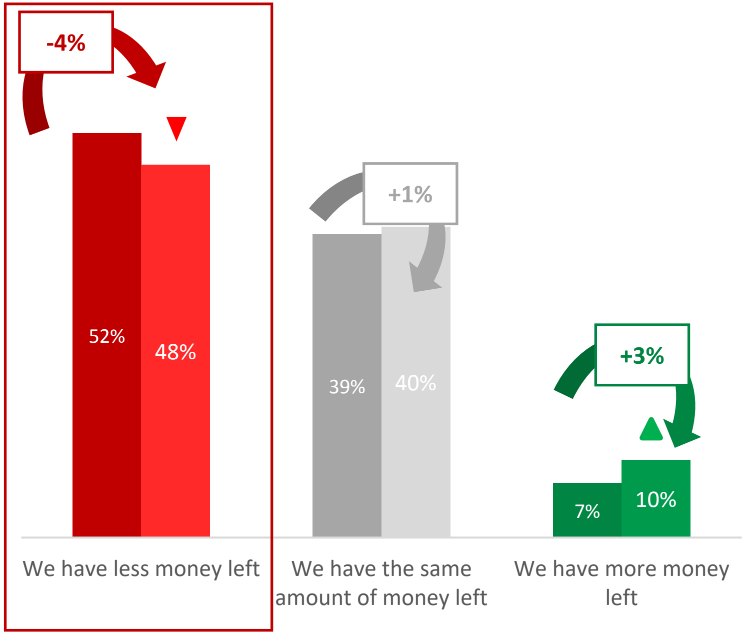
Some percentages may not add up to a sum of 100%. This is due to rounding of percentages to display a whole number, consistent with reporting formatting.

All data from external panel providers has been cleaned and vetted against rigid standards to remove those that flatline (select the first choice on all questions in order to complete the survey quicker), speeders (completion faster than 1/3 of the total LOI (15 minutes) and poor verbatim (gibberish, random characters and profanities).

All statistical significance has been calculated using a Z-Test between subgroups across all options.

Although ‘we have less money’ declined significantly this wave, still just under half feel they have less discretionary income. Being less confident in job security significantly increased this wave.

Household discretionary income



Darker bars are October 2023; Lighter bars are April 2024

Financial confidence vs. 6 months ago

[Difference vs. October 2023]

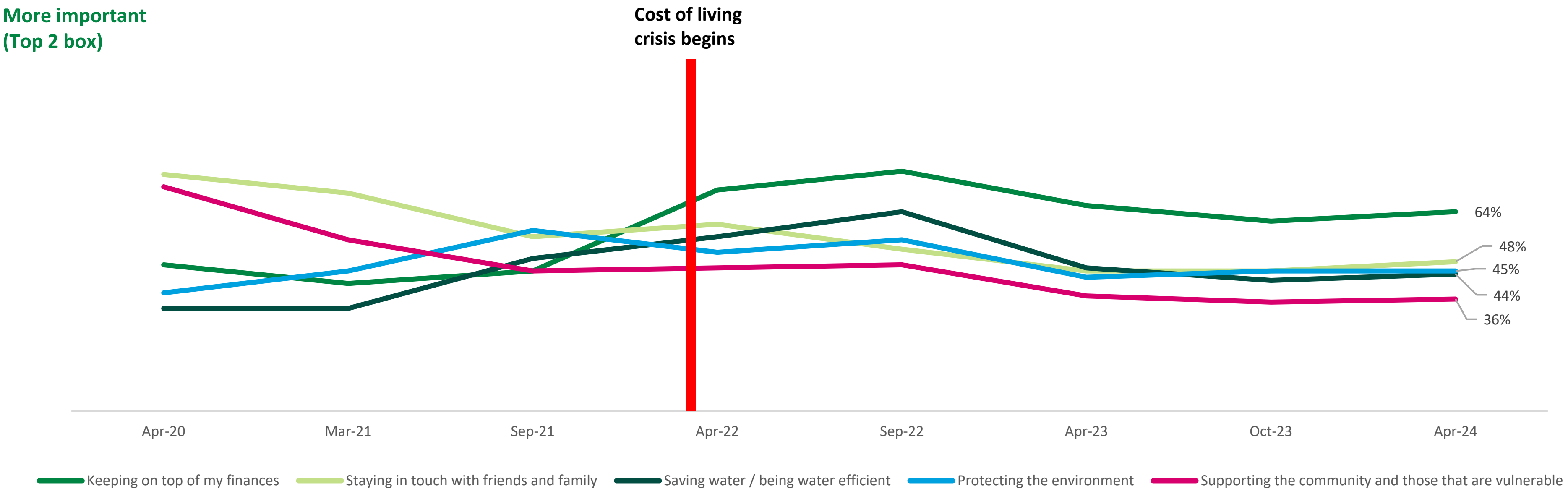
	Job security (yourself, friends, family)	Ability to invest in the future
Less confident	29% [+3%]	38% [-2%]
More confident	9% [0%]	10% [+1%]

Q8. How have each of the following changed for you compared to 6 months ago?
Q9. Compared to 6 months ago, how confident do you feel about...
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Significant difference at 95% CI

All options remained stable in the past 6 months, with 'keeping on top of my finances' remaining the most important option among customers.

Important aspects – change in L6M



Q4. Over the last 6 months, would you say the following aspects have become any more or less important to you?
Base: October 2023 (n= 1004)
Source: State of the Nation (October 2023)

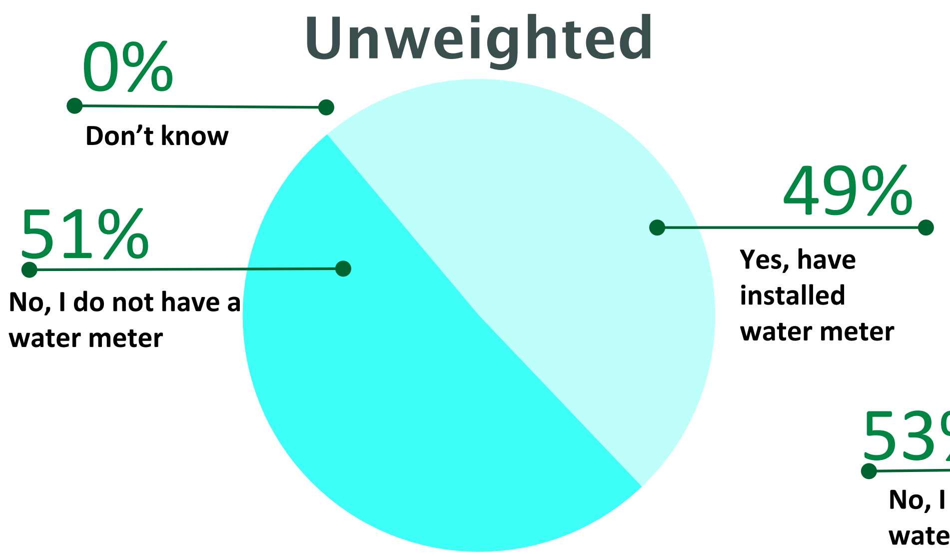
Significant difference at 95% CI

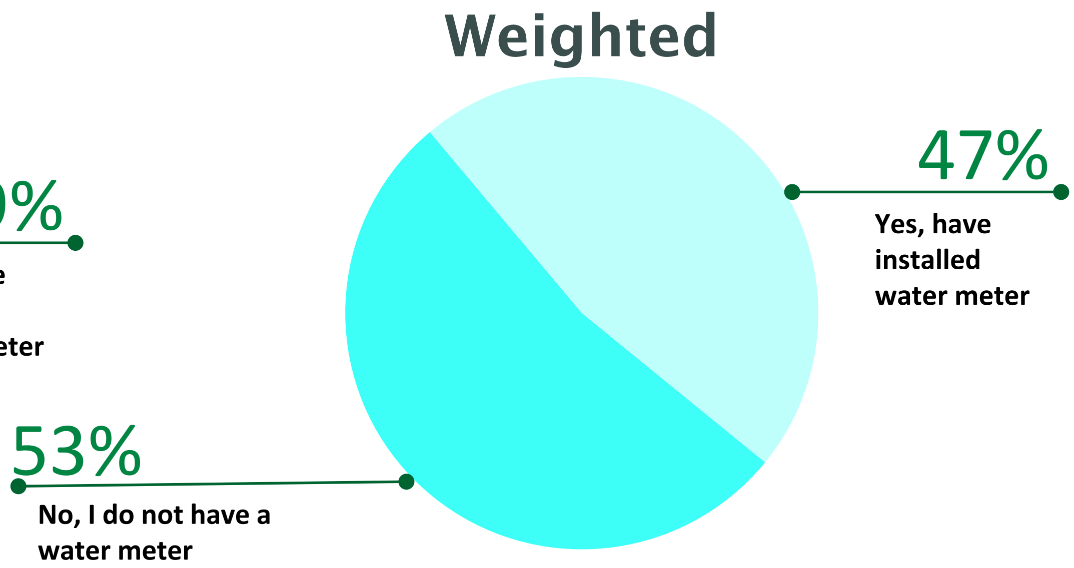
Significant year on year changed (April 2023 – 2024)

Total	Weighted %	
Question / option	**April 2023**	**April 2024**
Thinking about the country as a whole, to what extent are you concerned about the following issues at this time?		
Health	71%	74%
Now thinking specifically about the North West, which of the following do you think are the most important issues at this time?		
Condition of roads (e.g. potholes)	34%	42%
Housing	24%	27%
Tackling poverty and inequality	41%	35%
Flooding	5%	8%
Now thinking specifically about the North West, which of the following do you think are the most important issues at this time? (NETs)		
NET Social issues	78%	74%
NET Infrastructure issues	60%	69%
Over the last 6 months, would you say the following aspects have become any more or less important to you? (More important)		
Keeping on top of maintenance for my home	44%	49%
Making sure I get enough exercise	47%	53%
How have each of the following changed for you compared to 6 months ago?		
Shopping around to get the best deals (I've done this less)	3%	4%
Doing life admin / making payments online (I've done this less)	5%	7%
Your household's discretionary income (I/we have less)	58%	48%
Your household's discretionary income (I/we have more)	8%	10%
Compared to 6 months ago, how confident do you feel about...?		
Your ability to invest in the future (e.g. retirement, children's education) (NET Less confident)	47%	38%

Metered vs. Unmetered

Metered vs. Unmetered

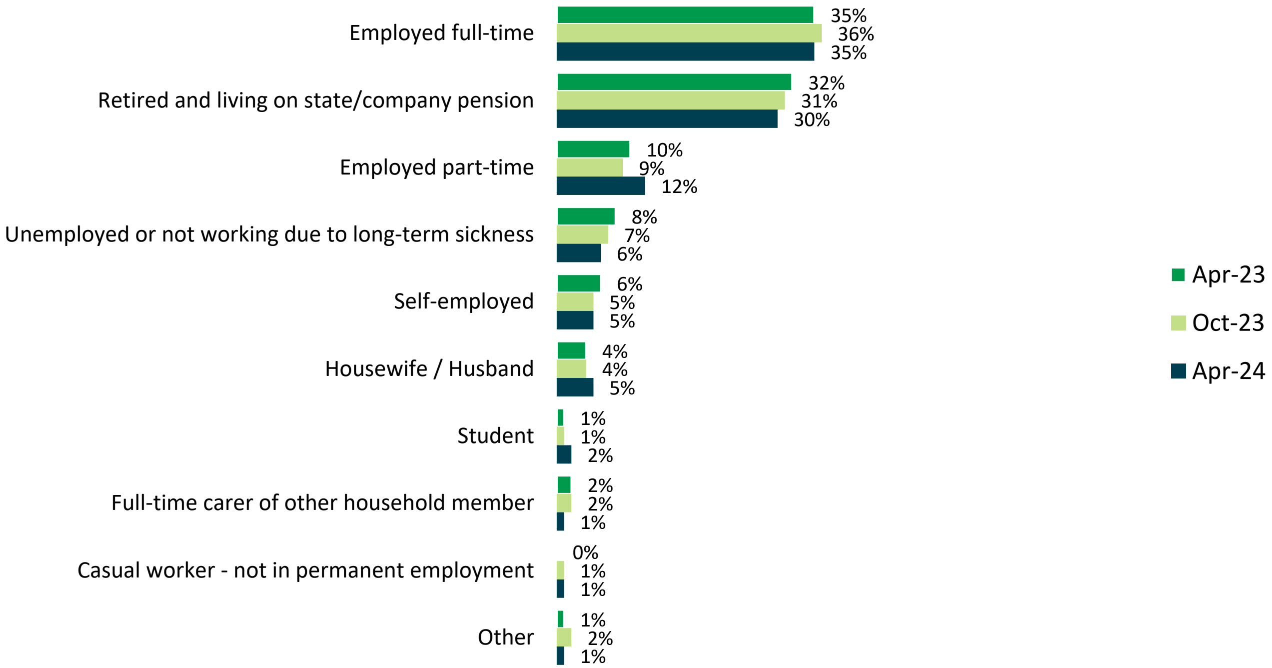




Q25: Do you currently have a water meter installed at your home?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Employment status

Employment status



Q26: Which of the following applies to you?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

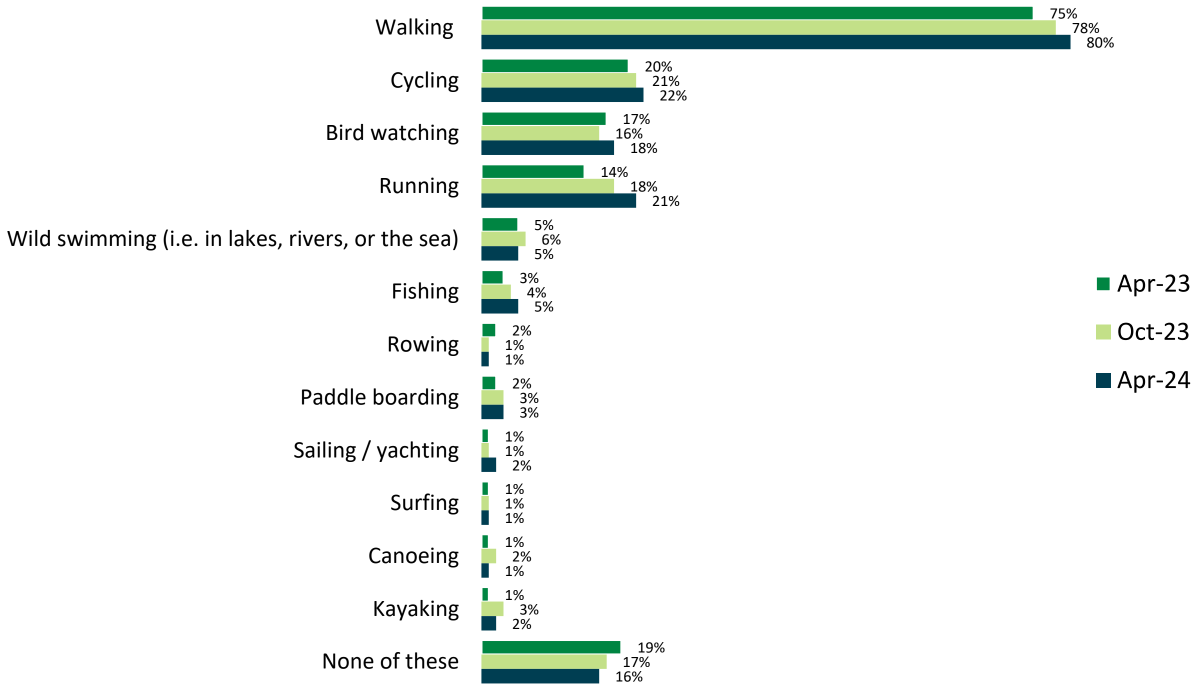
Sample profile

Total	Unweighted		Weighted	
	Count	%	Count	%
Gender				
Male	466	47%	490	49%
Female	528	53%	510	51%
Age				
18-29	82	8%	80	8%
30-39	142	14%	160	16%
40-49	175	18%	170	17%
50-59	187	19%	200	20%
60-69	170	17%	160	16%
70+	236	24%	230	23%
Region				
Cheshire	136	14%	140	14%
Cumbria	87	9%	90	9%
Greater Manchester	374	37%	370	37%
Lancashire	203	20%	200	20%
Merseyside	198	20%	200	20%

Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Activity engagement

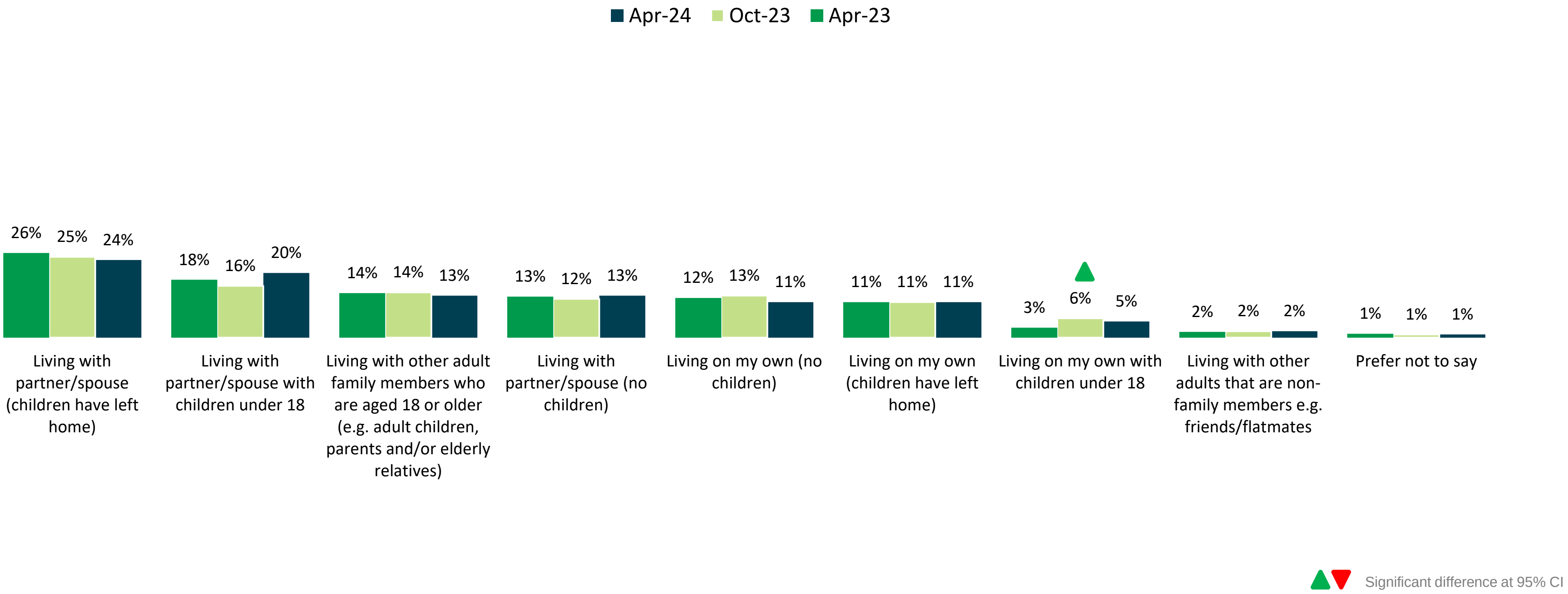
Activity engagement



Q22: Which of these activities, if any, have you done in the last 6 months?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Household status

Household status



Q23: Please could you confirm which household situation best applies to you?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Garden access

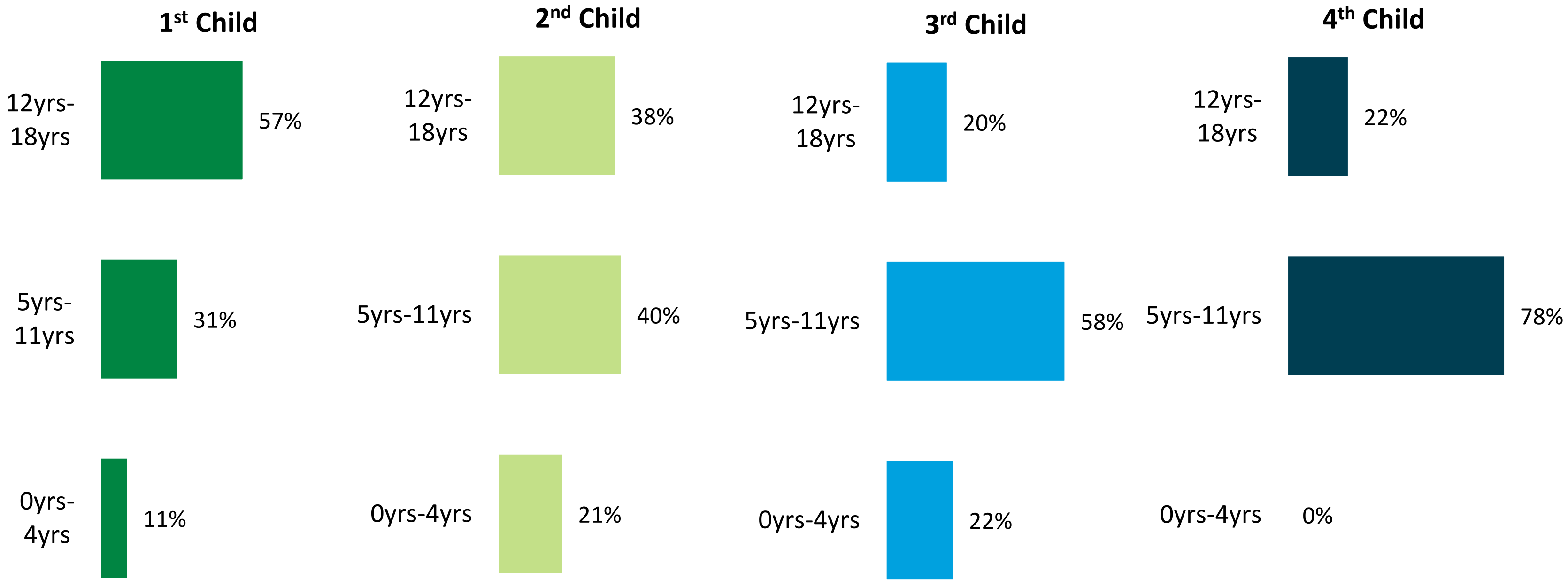
Garden access

Total		
	Count	**%**
Garden access		
Yes, there is a garden that I/we actively maintain (e.g. that you regularly or occasionally water)	654	65%
Yes, there is a garden but I/we do not actively maintain it (e.g. you do not regularly or occasionally water it)	199	20%
No, there is not a garden BUT there is a balcony/terrace with plants that gets actively maintained	53	5%
No, I/we do not have a garden	94	9%

Q27: Does the property you live in have a garden?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Children age breakdown (weighted)

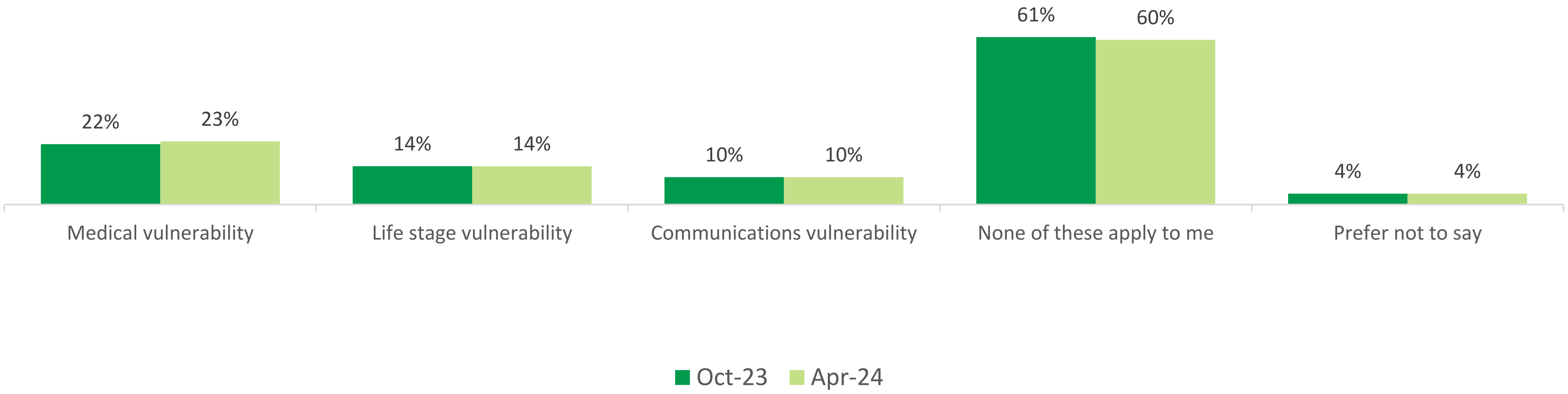
Children age breakdown (weighted)



Q27: You said you have children under 18 living at home. In what year were each of your children who are under 18 born?
Base: April 2024 (n= 247)
Source: State of the Nation (April 2024)

Vulnerability break down

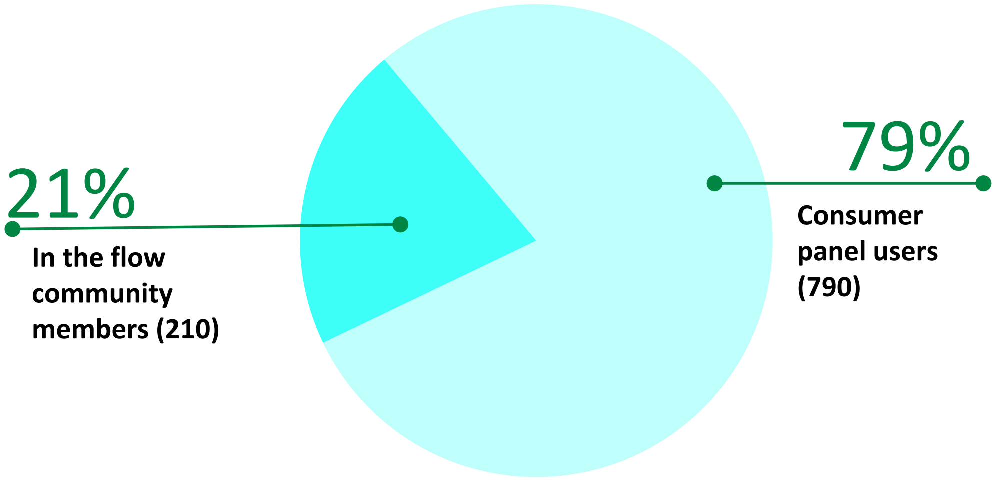
Vulnerability segment breakdown



Q28: Which of the following apply to you?
Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

Fieldwork breakdown

Sample source breakdown (unweighted)



Base: April 2024 (n= 1000)
Source: State of the Nation (April 2024)

The ‘in the flow’ panel

- In the flow is an online community designed to gather the views of those in the North West who have access to the internet (circa 90% of the population)
- Customer communities typically provide a deeper level of engagement with customers than ad-hoc pieces of research
- It provides rapid research access to United Utilities customers
  - This can provide fast and cost-effective feedback on a wide range of issues
- Where appropriate, work is supported with other methodologies and samples to represent those not present on in the flow
- Over 1,300 United Utilities customers are on the community

To find out more about using the ‘in the flow’ panel to meet your business needs, please contact **Shy Sharma or another member of the Insight Team**:

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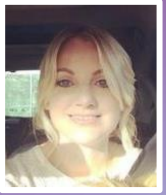

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