

State of the Nation Survey

March 2023



Sample Definition

Sample definition

Panel sample & TBC from external sample

Project timings:

Element	Who	Timings
Questionnaire finalised	UU / Explain	24 th March
Scripting and testing	Explain	27 th March to 31 st March
Fieldwork (panel)	Explain	3 rd April to 10 th April
Fieldwork (external)	Explain	10 April th to 24 th April
Draft report to UU	Explain	Friday 5 th May
Debrief	UU / Explain	TBC

Invite:

INVITE TEXT

SUBJECT LINE We'd like to hear your views on the state of the nation

PRE-HEADER There is a new survey opportunity for you on in the flow

Hi [first name],

In this latest survey, we are looking to get your views on a variety of topics, such as which societal issues are important to you, whether your shopping habits have changed recently, what's important to you when dealing with companies, and your views on sustainability.

Your feedback is important and will be used to influence decisions that United Utilities makes for the future. You will not only ensure that your opinions get heard, but we'll also enter you into our prize draw to win one of four £25 prizes.

If you'd like to take part, please click on the button below to start the survey which will take you around 15 minutes to complete.

[CLICK HERE TO GET STARTED]

Survey details

Prize draw: chance to win one of four £25 VEX vouchers in the prize draw

Closing date: 9.30am on TBC

Survey length: 15 minutes

Please let us know if you have any questions by emailing XX

Many thanks for your time and input,

The In the flow team

REMINDER TEXT

SUBJECT LINE

Closing Soon: There's still time to share your views on the state of the nation

PRE-HEADER

There is a new survey opportunity for you on in the flow

Hi [first name],

There's still time to take part in this survey and share your views on a variety of topics, such as which societal issues are important to you, whether your shopping habits have changed recently, what's important to you when dealing with companies, and your views on sustainability.

Your feedback is important and will be used to influence decisions that United Utilities makes for the future. You will not only ensure that your opinions get heard, but we'll also enter you into our prize draw to win one of four £25 prizes.

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Many thanks for your time and input,

The in the flow team

Intro:

SHOW FOR EXTERNAL ONLY Many thanks for taking part in our survey. We'd really appreciate your thoughts on a range of different topics today, which will take about 15 minutes to complete.

Please click on the 'NEXT' button below to get started.

Section A: Screener for external sample

ASK ALL EXTERNAL. SINGLE CODE. SCREENOUT IF CODE 4 NOT SELECTED

S1a. Please confirm which region you live in.

1. South East
2. South West
3. West Midlands
4. **North West**
5. North East
6. Yorkshire and Humber
7. East Midlands
8. East England
9. Scotland
10. Northern Ireland
11. Wales
12. London
13. Don't know

ASK ALL EXTERNAL. SINGLE CODE

S1b. Which part of the North West do you live in?

1. Cumbria
2. Cheshire
3. Greater Manchester
4. Lancashire
5. Merseyside

ASK EXTERNAL. OPEN NUMERIC

S2. How old are you?

[DESIGN NOTES; NUMERICAL BUT RESTRICT TO A MAXIMUM OF 100. PLEASE SCREENOUT AND SHOW SCREENOUT MESSAGE IF BELOW 18 OR OVER 54]

HIDDEN VARIABLE QAGEGROUP:

1. 18-34
2. 35-54
3. 55+

SCREENOUT TEXT: Thanks for your interest in this survey, however you don't quite fit the criteria we're looking for today

ASK ALL EXTERNAL. SINGLE CODE

S3. Are you responsible for paying the water bill in your household?

1. Yes, solely responsible
2. Yes, jointly responsible
3. No, I'm not

ASK ALL EXTERNAL. SINGLE CODE

S4. Are you...?

1. Male
2. Female
3. Other
4. Prefer not to say

SCREENOUT TEXT: Thanks for your interest in this survey, however you don't quite fit the criteria we're looking for today.

Intro:

SHOW FOR INTERNAL ONLY Many thanks for taking part in our survey. We'd really appreciate your thoughts on a range of different topics today, which will take about 15 minutes to complete.

You may have completed a survey like this before, but we'd still really like to hear your latest views so we can gather an updated view on the state of the nation.

Please click on the 'NEXT' button below to get started.

Section B: Society and finances

ASK ALL. SINGLE CODE PER DOWNBREAK. FLY-IN STATEMENTS

Q1. Thinking about the country as a whole, to what extent are you concerned about the following issues at this time?

TOP BREAKS – RANDOMISE

1. The economy
2. The environment
3. Climate change
4. My household finances
5. Crime
6. Immigration & asylum
7. Health
8. Education
9. Britain leaving the EU

10. Family life and childcare

DOWNBREAKS

1. Not at all concerned
- 2.
3. Neutral
- 4.
5. Extremely concerned

ASK ALL. MULTI CODE UP TO 3. RANDOMISE

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.

1. Protecting the natural environment / green spaces
2. Climate change
3. Minimising disruption from street works
4. Crime
5. Education
6. Maintenance of recreation sites (e.g. countryside parks and reservoirs)
7. Transport
8. Condition of roads (e.g. potholes)
9. Keeping streets free from litter / fly tipping
10. Housing
11. Tackling poverty and inequality
12. Protecting rivers and the sea
13. Jobs and employment opportunities
14. Flooding
15. Don't know **HOLD. EXCLUSIVE**

ASK ALL. GRID. SINGLE CODE PER ROW. RANDOMISE ROWS

Q4. Over the last 6 months, would you say the following aspects have become any more or less important to you?

ROWS

1. Saving water / being water efficient
2. Protecting the environment
3. Keeping on top of maintenance for my home
4. Supporting the community and those that are vulnerable
5. Staying in touch with friends and family
6. Keeping on top of my finances

-
7. Making sure I eat a healthy, balanced diet
 8. Making sure I get enough exercise

COLUMNS

1. Far less important
2. Slightly less important
3. No change
4. Slightly more important
5. Far more important

ASK ALL. GRID. SINGLE CODE PER ROW. RANDOMISE

Q5. Which, if any, bills or costs are you worried about paying?

ROWS – RANDOMISE

1. Mortgage / rent
2. Phone / broadband bill
3. Water bill
4. Electricity / gas bill
5. Council tax
6. Personal loan repayments
7. TV licence
8. Holidays
9. Streaming subscription (e.g. Spotify, Netflix, Amazon Prime, etc.)
10. Car tax / insurance
11. Food

COLUMNS

1. Not worried at all
2. Not very worried
3. Somewhat worried
4. Very worried
5. Extremely worried
6. Not applicable

ASK ALL. SINGLE CODE PER DOWNBREAK. FLY-IN STATEMENTS

Q6. How difficult would you say it is for your household to meet the monthly payments on your bills?

TOP BREAKS – DO NOT RANDOMISE

1. 6 months ago
2. Now
3. In 6 months' time

DOWNBREAKS

1. Extremely difficult
2. Very difficult
3. Somewhat difficult
4. Slightly difficult
5. Not difficult at all

ASK ALL. SINGLE CODE PER DOWNBREAK. FLY-IN STATEMENTS

Q7. And, specifically, how difficult would you say it is for your household to pay your water bill?

TOP BREAKS – DO NOT RANDOMISE

1. 6 months ago
2. Now
3. In 6 months' time

DOWNBREAKS

1. Extremely difficult
2. Very difficult
3. Somewhat difficult
4. Slightly difficult
5. Not difficult at all

ASK ALL. SINGLE CODE PER DOWNBREAK. FLY IN STATEMENTS

Q8. How have each of the following changed for you compared to 6 months ago?

TOP BREAKS – RANDOMISE

1. Making online purchases
 2. Making impulse purchases
 3. Making big expensive purchases (car, home improvements)
 4. Shopping around to get the best deals
 5. Spending money with companies I trust
 6. Spending money with local, independent companies
 7. Spending money with ethical companies
 8. Dealing with companies via online channels (e.g. email, live chat, etc.)
 9. Doing life admin / making payments online
 10. Your household's discretionary income
-

DOWNBREAKS – DO NOT RANDOMISE

1. I've done this less
2. No change
3. I've done this more
4. Not sure

FOR TOPBREAK 10 'YOUR HOLDHOLD'S DISCRETIONARY INCOME' PLEASE SHOW:

1. I/we have less
2. No change
3. I/we have more
4. Not sure

ASK ALL. SINGLE CODE PER DOWNBREAK. FLY IN STATEMENTS

Q8a. Below are some actions people may be taking in relation to an increasing cost of living. To what extent are you doing any of these this year in relation to your budgeting and spending?

TOP BREAKS – RANDOMISE

1. Washing clothes at lower temperatures
2. Reducing the length of showers I take or reducing the number of baths I take
3. Driving less to save on petrol / reducing my travel costs
4. Reduce my spending on things that I need (e.g. buying food from value ranges/cheaper options)
5. Spending less on things that I enjoy (e.g. eating out, holidays, socialising)
6. Reducing the speed I drive to use less fuel
7. Having home improvements made to my home to make it more energy efficient (e.g. loft insulation)
8. Skipping meals / eating less
9. Ride-sharing more to reduce travel costs
10. Shopping at discount supermarkets (e.g. Aldi, Lidl)
11. Spending more time in the office to conserve energy / water
12. Applying for a water meter
13. Applying for a smart energy meter

DOWNBREAKS

1. I am already doing this
2. I will definitely do this
3. I may or may not do this
4. I will definitely not do this

ASK ALL. SINGLE CODE PER DOWNBREAK

Q9. Compared to 6 months ago, how confident do you feel about...

TOP BREAKS – RANDOMISE

1. Job security for yourself, your family and other people you know personally
2. Your ability to invest in the future (e.g. retirement, children's education)

DOWNBREAKS

1. Much less confident
2. Slightly less confident
3. No change
4. Slightly more confident
5. Much more confident

Section C: Activities and water usage

SHOW TEXT ON SEPARATE SCREEN BY ITSELF

In the next few questions, we'd like to understand a little more about how your day to day activities may have changed over the past 6 months.

ASK ALL. SINGLE CODE. FLY IN STATEMENTS

Q10. Over the past 6 months, for each of the following activities have you been doing them more, less or the same amount than you were previously?

TOPBREAKS – RANDOMISE

1. Watching TV / playing video games
2. Working from home
3. Going for walks / exercising
4. Gardening / watering plants
5. Washing my hands
6. Showering
7. Taking baths
8. Using the toilet
9. Cooking or baking
10. Drinking water / tea / coffee
11. Ordering takeaways
12. Shopping (either online or in-store)
13. Socialising with friends / family
14. Visiting areas of natural beauty in the North West
15. Going on holiday in the UK **KEEP WITH CODE 16**
16. Going on holiday abroad **KEEP WITH CODE 15**
17. Going to restaurants / cafes / pubs / bars

DO NOT RANDOMISE

1. Less
2. No change
3. More

4. Not sure

ASK ALL. SINGLE CODE. FLY IN STATEMENTS

Q11. And looking ahead to 6 months from now, for each of the following do you expect to be doing them more, less or the same amount as you do now?

TOPBREAKS – RANDOMISE

1. Watching TV / playing video games
2. Working from home
3. Going for walks / exercising
4. Gardening / watering plants
5. Washing my hands
6. Showering
7. Taking baths
8. Using the toilet
9. Cooking or baking
10. Drinking water / tea / coffee
11. Ordering takeaways
12. Shopping (either online or in-store)
13. Socialising with friends / family
18. Visiting areas of natural beauty in the North West
19. Going on holiday in the UK **KEEP WITH CODE 16**
20. Going on holiday abroad **KEEP WITH CODE 15**
21. Going to restaurants / cafes / pubs / bars

DO NOT RANDOMISE

1. Less
2. No change
3. More
4. Not sure

ASK ALL. GRID. MULTI CODE. RANDOMISE

Q12. Which, if any, of the following items have you disposed of down the toilet or sink/drains in the past 6 months?

Please be assured that all of your responses will be kept fully anonymous and won't be attributed to you or your details.

Please select all that apply.

1. Baby wipes
2. Moist toilet tissue wipes
3. Cleaning / disinfectant wipes
4. Nappies

5. Sanitary towels / panty liners
6. Tampons
7. Food waste
8. Pet mess
9. Cigarettes
10. Pets that have passed away
11. Pet hair / human hair
12. Cotton pads, cotton buds
13. Make-up wipes
14. The contents of your vacuum cleaner
15. Condoms
16. Dental floss
17. Kitchen towel
18. Cooking fats / oils
19. Tissues (not toilet tissue)
20. Contact lenses
21. Plasters
22. None of these **HOLD. EXCLUSIVE**

ASK ALL. OPEN FORCE RESPONSE.

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?

Section D: Brands and retailers

SHOW TEXT ON SEPARATE SCREEN BY ITSELF

In the next few questions, we'd like to understand a little more about your views on brands and retailers.

ASK ALL

Q15. Please tell us about a time when you experienced great innovation from a company and what made it so innovative?

OPEN TEXT BOX WITH 'DON'T KNOW / CAN'T SAY' TICK-BOX

ASK ALL. GRID. SINGLE CODE PER ROW.

Q16. Which of the following types of communications would you be open to receiving from United Utilities?

Please be assured that this is just to gauge your interest, you aren't opting in to receiving anything from United Utilities.

ROWS – RANDOMISE

1. Information on schemes for customers struggling to pay their water bill
2. Light relief e.g. something fun that will distract me
3. Tips on how I can save water in my home
4. Tips on how to save money
5. Tips on what items not to put down the toilet or sink / drain
6. Tips on home maintenance
7. Information on how I can ensure good water quality in my home
8. Information on how United Utilities are supporting the environment
9. Information on how to access and things to do at United Utilities' countryside parks or reservoirs
10. Updates on what United Utilities are doing as a company
11. Information on what United Utilities are doing in my local area and community
12. Information on what United Utilities are doing to meet the challenges presented by climate change (e.g. extreme rainfall, drought)
13. Advice on how to avoid blockages in toilets, sinks, pipes and drains
14. Information on how to prevent pollution to the environment

COLUMNS

1. I would be interested in receiving communications about this
2. I would not want to receive communications about this
3. Not sure

ASK ALL. RANKING EXERCISE.

Q28. Please rank the following issues in order of importance, where 1 = the issue United Utilities should prioritise tackling first.

RANDOMISE

1. Protecting river health
2. Protecting wildlife and biodiversity
3. Preventing pollution to the environment
4. Reducing leakage
5. Preventing wastewater flooding
6. Encouraging customers and industry to be water efficient
7. Investing in sustainable solutions and technology
8. Keeping bills low
9. Supporting customers on low incomes or in vulnerable circumstances

ASK ALL. OPEN TEXT BOX WITH NOT SURE/ DON'T KNOW OPTION

Q17. Is there anything else you'd like to see United Utilities doing more of?

Section E: Environmental attitudes and behaviours

SHOW TEXT ON SEPARATE SCREEN BY ITSELF

Now we'd like to hear more about your views on sustainability and any environmental behaviours you have adopted.

ASK ALL. SINGLE CODE PER ROW

Q18. How much do you agree or disagree with the following statements?

ROWS – RANDOMISE

1. I do everything I personally can to help the environment
2. In truth, I only do what I feel obliged to do for the environment and no more
3. I try to travel on public transport/walk/cycle as much as I can rather than by car
4. I look to buy sustainably produced goods wherever possible
5. It takes too much effort to be 'green'
6. I try to recycle as much as I can
7. I would like to be doing more to be 'green'
8. I am happy to pay more for eco-friendly products or services

COLUMNS

1. Strongly disagree
2. Somewhat disagree
3. Neither agree nor disagree
4. Somewhat agree
5. Strongly agree

ASK ALL. SINGLE CODE PER ROW

Q19. How would you describe your behaviour towards each of the following sustainable activities?

ROWS – RANDOMISE

1. Recycling
2. Reducing your energy usage
3. Avoiding single-use plastics
4. Eating more plant-based foods instead of animal products
5. Travelling by car less often
6. Buying fewer new clothes

7. Upcycling items you own
8. Buying more second-hand items
9. Eating food sourced locally
10. Picking up litter
11. Reducing your water usage **KEEP WITH CODE 12**
12. Re-using water e.g. via a water butt **KEEP WITH CODE 11**
13. Reducing your personal impact on air pollution

COLUMNS

1. I have thought about it but I don't plan to start
2. I have never really thought about it and I don't plan to start
3. I have never really thought about it, but would be open to doing so
4. I intend to start doing this soon
5. I have recently started doing this
6. I have been doing this for a long time
7. I started doing this but couldn't stick to it

ASK IF MORE THAN ONE ROW AT Q19 = 3-5. AUTO-PUNCH IF ONE CODE SELECTED AT Q19. SHOW CODES SELECTED AT Q19. SINGLE CODE

Q20. And which of the following are you most interested in / passionate about?

1. Recycling
2. Reducing your energy usage
3. Avoiding single-use plastics
4. Eating more plant-based foods instead of animal products
5. Travelling by car less often
6. Buying fewer new clothes
7. Upcycling items you own
8. Buying more second-hand items
9. Eating food sourced locally
10. Picking up litter
11. Reducing your water usage **KEEP WITH CODE 12**
12. Re-using water e.g. via a water butt **KEEP WITH CODE 11**
13. Reducing your personal impact on air pollution

ASK ALL. MULTI CODE. RANDOMISE

Q21. Which of the following would you expect companies to be doing as part of their standard operating procedures?

Please select all that apply.

1. Monitoring carbon emissions
2. Provide environmental training to staff
3. Carbon offsetting
4. Sustainable transport
5. Minimising waste
6. Minimising noise disturbance
7. Using non-toxic products
8. Reducing use of single-use plastics
9. Reducing their impact on air pollution
10. Protecting wildlife and biodiversity
11. Other (please specify) **HOLD**
12. Don't know **HOLD. EXCLUSIVE**

Section F: Additional profiling

SHOW TEXT ON SEPARATE SCREEN BY ITSELF

Finally, just a few more questions to help us put your answers into context.

ASK ALL. MULTICODE. RANDOMISE

Q22. Which of these activities, if any, have you done in the last 6 months?

Please select all that apply.

1. Walking
2. Cycling
3. Running
4. Sailing / yachting
5. Fishing
6. Bird watching
7. Wild swimming (i.e. in lakes, rivers, or the sea)
8. Surfing
9. Rowing
10. Canoeing
11. Kayaking
12. Paddle boarding
13. None of these **HOLD. EXCLUSIVE**

ASK ALL. SINGLE CODE

Q23. Please could you confirm which household situation best applies to you?

1. Living on my own (children have left home)
2. Living on my own (no children)
3. Living on my own with children under 18
4. Living with partner/spouse (children have left home)
5. Living with partner/spouse (no children)
6. Living with partner/spouse with children under 18
7. Living with other adult family members that are aged 18 or older (e.g. adult children, parents and/or elderly relatives)
8. Living with other adults that are non-family members e.g. friends/flatmates
9. Prefer not to say

ASK IF HAVE CHILDREN UNDER 18 LIVING AT HOME [Q23=3 OR 6]

Q24. You said you have children under 18 living at home. In what year were each of your children who are under 18 born?

DROP DOWN LIST YEAR FOR EACH CHILD

1. 1st Child **FORCED**
2. 2nd Child

3. 3rd Child
4. 4th Child
5. 5th Child

ASK ALL. SINGLE CODE

Q25. Do you currently have a water meter installed at your home?

1. Yes
2. No
3. Don't know

ASK ALL. SINGLE CODE

Q26. Which of the following applies to you?

1. Employed full-time
2. Employed part-time
3. Self-employed
4. Housewife / Husband
5. Student
6. Casual worker - not in permanent employment
7. Retired and living on state/company pension
8. Unemployed or not working due to long-term sickness
9. Full-time carer of other household member
10. Other, please specify
11. Prefer not to say

ASK ALL. SINGLE CODE

Q27. Does the property you live in have a garden?

1. Yes, there is a garden that I/we actively maintain (e.g. that you regularly or occasionally water)
2. Yes, there is a garden but I/we do not actively maintain it (e.g. you do not regularly or occasionally water it)
3. No, there is not a garden BUT there is a balcony/terrace with plants that gets actively maintained
4. No, I/we do not have a garden

END TEXT: Thanks for your time today, that's all the questions we have. We really appreciate your feedback.

Closing text

That's all for today! Thank you so much for taking the time to complete this survey, we appreciate your feedback.

SHOW TO PANEL: Becky and the in the flow team