United Utilities

State of the Nation

May 2025

Background and Approach

Research objectives and approach

Background

The 'state of the nation' looks at customers' general views and behaviours, and their concerns both at national and regional level. This is an opportunity for customers to tell United Utilities about what's important to them.
This is the latest iteration of a regular tracking survey, which explores customer opinions twice a year.

Objectives

The research sought to answer the following objectives:
- Customers' key concerns and what's important to them
- Thoughts on the future, both at home and nationally
- Household finances and concerns around meeting bill payments
- Changes in water usage at home
- Environmental attitudes and behaviours

Approach

A 20 - minute quantitative survey with 1000 customers.

Fieldwork took place 3rd April to 9th May 2025.

Customers were recruited from the 'In the Flow' panel and from an external access panel.

Data

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 occurred during fieldwork?

Fieldwork dates: 3rd April to 9th May 2025

Global Conflict

BBC

Israeli army starts calling up reservists for planned expansion t
Gaza offensive

Economy

sky news

Bank of England cites trade war hit for interest rate cut to 4.25%

Political Climate

BBC

India trade deal could undercut UK workers, opposition parties say

Dry weather

BBC

UK on track for driest spring on record

Immigration

Mirror

Major immigration crackdown unveiled by Keir Starmer - with huge change to citizenship rules

Prime Minister Keir Starmer will declare a 'clean break from the past' as the Government publishes a long-awaited immigration blueprint on Monday

Economy

BBC

Falling petrol prices push UK inflation down

Industry context: What was happening in the lead up and around the time of the research?

Fieldwork dates: 3rd April to 9th May 2025

Cost of living crisis

Climate change

Storm overflows and pollution

General Election 2024

January
News outlets shared that United Utilities had dropped its legal fight to block access to data on the discharge of sewage in Lake Windermere. Other news reports suggest United Utilities plans to increase dividend payments, with water bills increasing.

February
Several water companies set intentions for delivering AMP8 plans. Continued coverage of national water bill increases.

March
The Guardian and The Independent report that the UK Government will clean up Windermere after months of criticism. United Utilities plans to invest £200 million over five years to upgrade sewers and treatment plans around Windemere. River campaigners plan to sue Ofwat over water bill rises. Thames Water are awaiting a decision over £3bn deal with creditors.

April
Scottish Water workers begin strike action. Media coverage of potential PFAS and forever chemicals in drinking water. Ofwat investigating cost of water firms' infrastructure works. Announcement that water company bosses could be jailed for covering up pollution.

Early May
Significant dry weather experienced in the area. Reports of wildfire in the Peak District. Commencement of water efficiency communications.

Cumbria
- United Utilities concedes in Windemere Sewage Data Access case.
- Announcement of £200 million investment to reduce further spills around Windemere

Lancashire
- Firefighters battle woodland blaze in Leyland

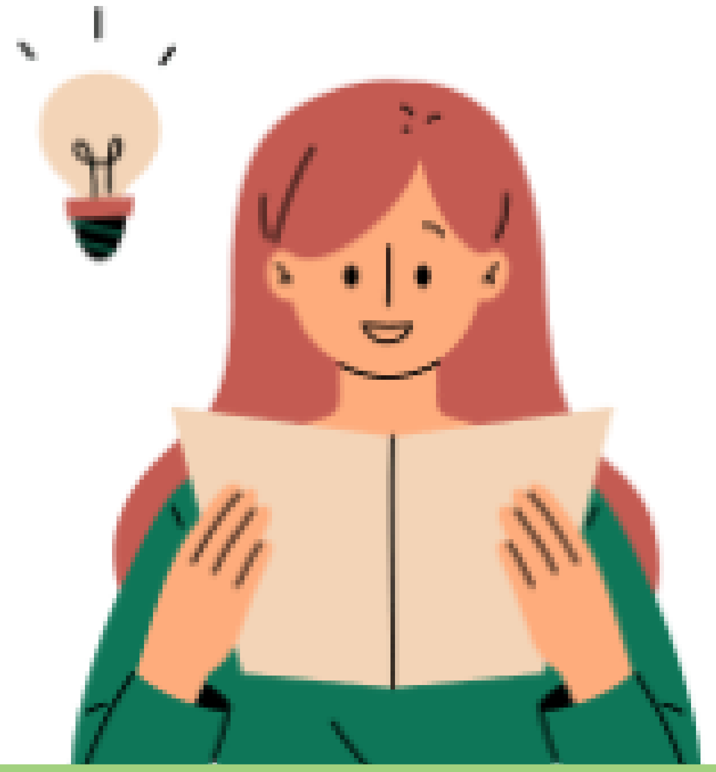
Merseyside
- Liverpool City Council published a Section 19 investigation report into flooding events on Queens Drive in 2023

Greater Manchester
- Burst water pipe in Didsbury causes disruption
- Announcement of new Davyhulme scheme converting sewage waste into clean energy

Chester
- Crewe road closed for emergency pipe repairs

Key Findings

Key Findings



Immigration becomes a bigger concern when comparing with this time last year.

- When considering the country as a whole, issues remained relatively consistent with September last year however year on year, immigration achieved a significant increase.
- Specific to the North West, infrastructure returned an increase, particularly with customers citing condition of the roads being the most Important issue at this time (42%)

While still a key point, less customers highlighted sewage leaks as a main area of focus.

- Climate change returned a significant decrease in customers concerned about the country as a whole.
- Last wave saw support for prevention of sewage leaks at specific recreation sites however this was not a topic raised in April 2025.
- Prevention of sewage leaks also saw a decline when customers were asked what they wanted to see United Utilities do more of.

A higher focus on financial concerns was identified this wave.

- There were significantly less people indicating they had the same level of discretionary income compared to 6 months ago.
- Customers highlighted cheaper bills when considering what they what United Utilities to do more of, with a 3% increase in this area this wave.
- A higher concern from customers in relation to food bills and costs was evident in April 2025. Over half expressed their concern about meeting the household food bill. This is backed up with less people opting to eat locally sourced food and more shopping around to get the best deals.
- Those retired were significantly less likely to be extremely worried about food costs than those 18-59.
- The economy continued to be the main concern for customers, whilst health and crime were also persistent areas of concern.
- Overall financial confidence amongst younger customers, aged 18-39, saw an improvement.

The vast majority continue to be aware of the consequences of flushing, though this does not necessarily stop the behaviour.

- 92% were aware that disposing of products down the toilet, sink or drain could lead to blockages, however, only 55% of customers had not done this. Toilet tissue wipes (17%) tissues not toilet tissue (13%) and pet/human hair (13%) were the most disposed of items
- Having no bathroom bin could indicate the reason for flushing as the highest percentage of those flushing most of the items stated they did not have one.

Customers want consistent levels of communication to last year.

- Communication preferences remained relatively consistent with September 2024 as customers would be interested in receiving information on water quality and efficiency, including where water comes from and how it's treated, and tips on how to save money. Light relief communication continued to be the least desired.

Priorities & Finances

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Water for the North West

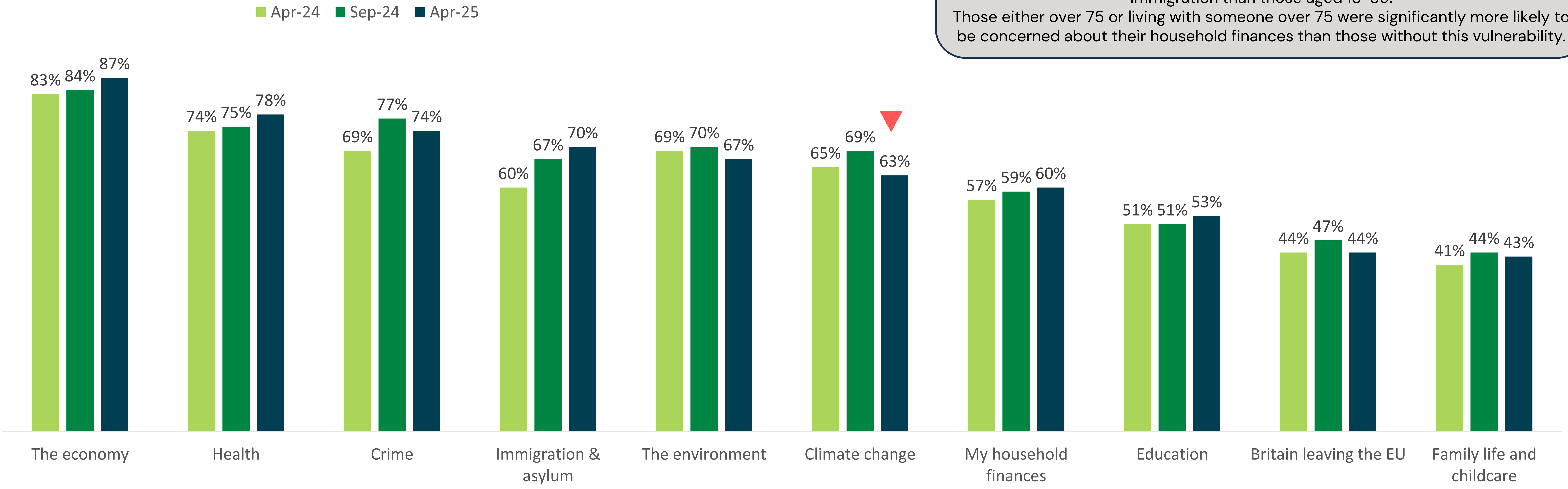
in the flow
on behalf of United Utilities
Water for the North West

explain

The economy continues to be the main concern for customers with 87%. Health overtook crime this wave to be the secondary concern. Climate change observed the largest decrease (-6%) since Sept 2024. When comparing April 2024, immigration and asylum has shown a significant increase.

Those with a meter were significantly more likely to be extremely concerned about the economy than those without a meter.
Those from Merseyside were significantly more likely to be extremely concerned about the environment than those from Cheshire.
Those aged 60+ were significantly more likely to be extremely concerned about immigration than those aged 18-59.
Those either over 75 or living with someone over 75 were significantly more likely to be concerned about their household finances than those without this vulnerability.

Current concerns (Very/quite concerned)

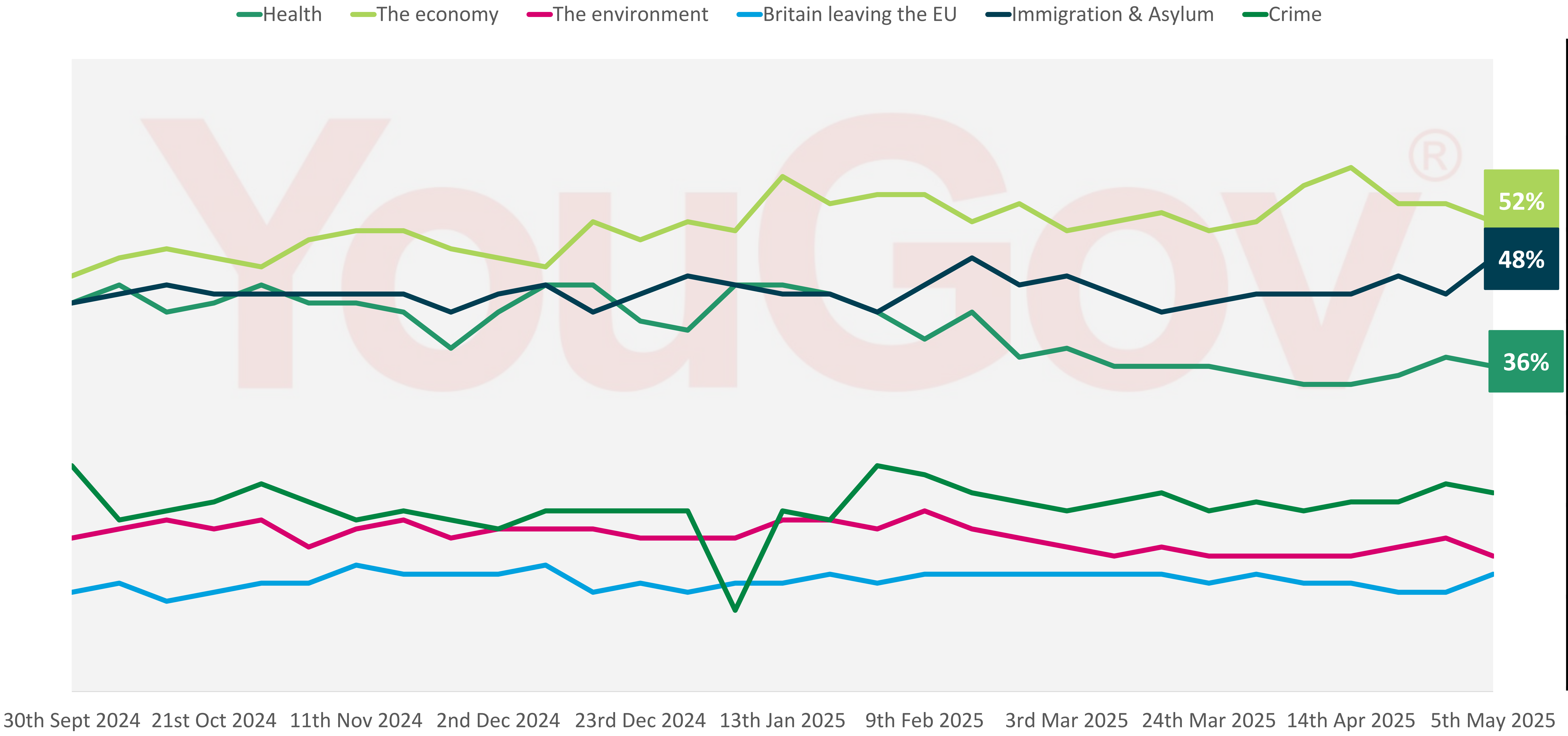


Q1. Thinking about the country as a whole, to what extent are you concerned about the following issues at this time?
Base: April 2025 (n=1000)

Significant difference at 95% CI

External research shows although a dip in September 2024, the economy remains the most important issue. A significant decline of –9% in health was also presented in May 2025.

Important issues facing the country – YouGov data



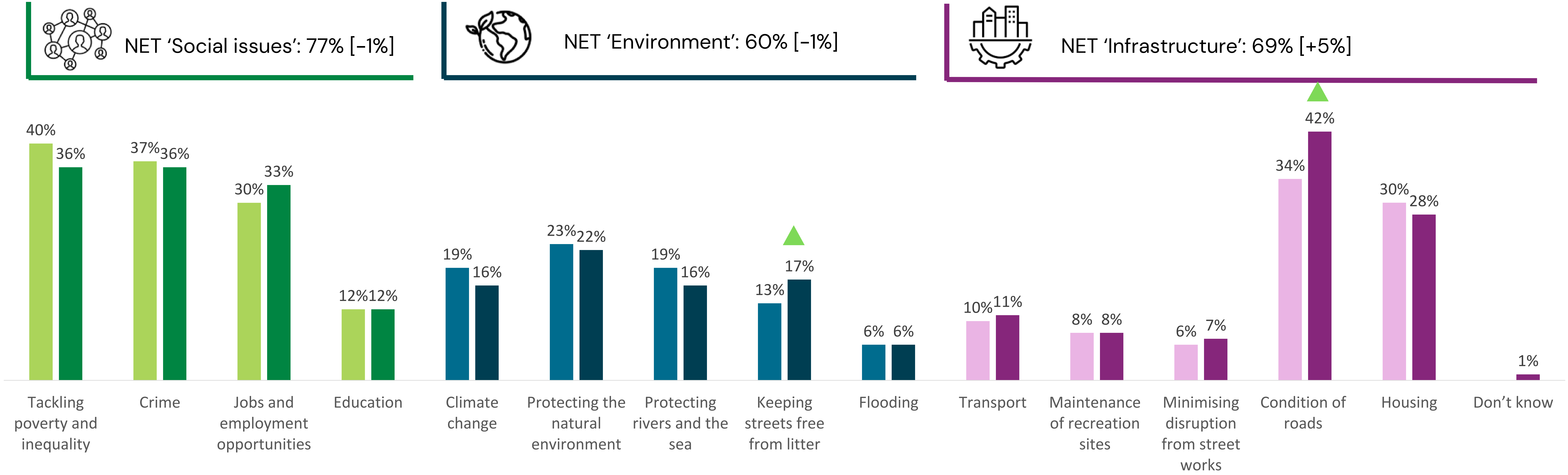
Issues	Diff vs. Sep 2024
Economy	+4%
Health	-9%
Environment	-2%
Immigration	+2%
Leaving EU	+2%
Crime	0%

Source: YouGov tracker
https://yougov.co.uk/topics/society/trackers/the-most-important-issues-facing-the-country

Overall, social issues within the North West remain the most important. However, infrastructure achieved an increase of 5%, specifically condition of the roads which turned over the highest level of concern with 42% (+8% increase).

Current concerns – North West specifically

Males were significantly more likely than females to think climate change was the most important.
Those from Cumbria were significantly less likely to think crime was the most important.
18-39 year olds were significantly more likely to think housing was most important.



Darker bars are April 2025; Lighter bars are September 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 2025 (n=1000)

Significant difference at 95% CI

Those who selected maintenance of recreation sites in the previous question were asked if elaborate on the specifics. Many suggestions overlapped with the overarching theme being maintenance and cleanliness in some form alongside additional facilities.

Additional requests for maintenance and amenities in the North West

Better maintenance (32%)

- *"Local parks not always maintained"*
- *"Just all of them need maintained better and painted in some areas"*
- *"Maintenance of the riverbank at Burrs Country Park, all along the Irwell. The amount of litter in the river and along the riverbank after the floods earlier this year is awful, but work needs to be done."*

More facilities (16%)

- *"I regularly visit UU sites, specifically Rivington and it would be good to have more facilities there; bins, seating, I would also be keen on establishing a coffee trailer on the car park"*
- *"Gym equipment for older children and adults around park areas as you often find in other countries"*

Keep clean (14%)

- *"Clean up in the Crompton lodges country park and along the river croak and irwell"*
- *"Street cleaning and potholes"*

More Bins (9%)

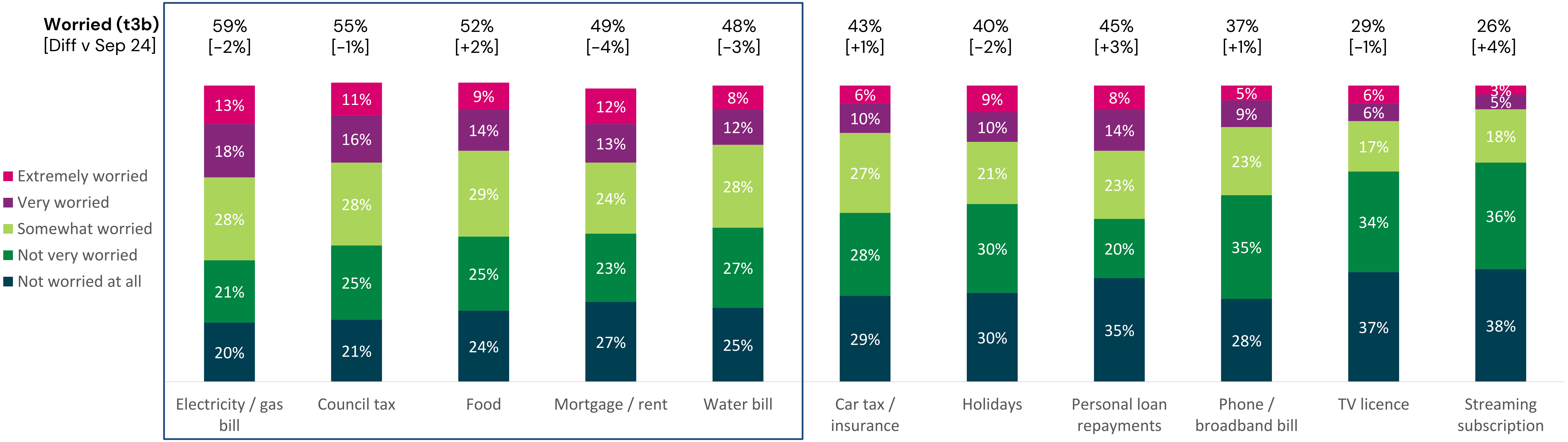
- *"More places for dog bags to be disposed"*
- *"More rubbish bins for community"*

Q2a. Is there anything in particular in regards to maintenance or amenities, that you would like to see at specific recreation sites in the North West? Please specify the name of the site you are referring to.
Base: April 2025; Coded themes from n=82 open responses (Excluding nothing/don't know and N/A, base is n=56. % is based off this figure

Electricity and gas bills remained the bill respondents were most concerned about their ability to pay, despite seeing a decrease (-2%). Interestingly, there was a decrease in worry towards mortgage and rent (-4%), however food returned a higher score with over half (52%) concerned with the cost of this.

Those from Merseyside were significantly more likely to be extremely worried about their rent than those from Cheshire.
Those retired were significantly less likely to be extremely worried about the cost of food than those 18 to 59.

Concern about meeting household bills



Q3. Which, if any, bills or costs are you worried about paying?
Base: April 2025 (excluding those who said ‘not applicable’ - base varies per bill; n= 525-999)

Significant difference at 95% CI

Streaming subscriptions returned the highest increase in concern (+4%) since September 2024 while mortgage/rent returned the biggest decrease (-4%).

Concern for meeting bills (NET: Worried)

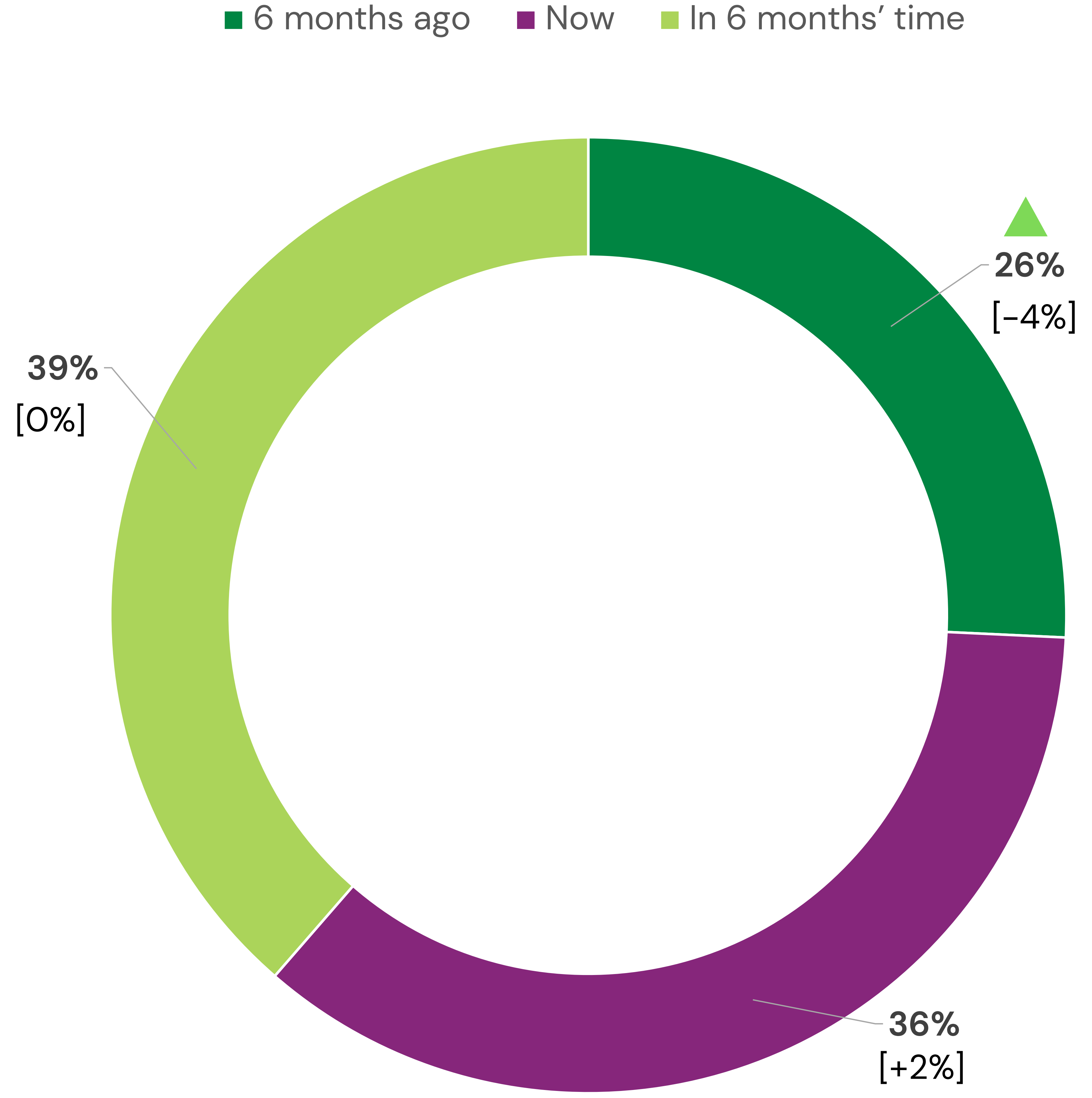
Concern for meeting bills (NET: Worried - T3B)	Apr-20	Mar-21	Sep-21	Apr-22	Sep-22	Apr-23	Oct-23	Apr-24	Sep-24	Apr-25	Diff vs Sep-24
Electricity / gas bills	21%	28%	56%	84%	88%	74%	65%	62%	61%	59%	-2%
Food	21%	27%	38%	61%	72%	74%	57%	54%	49%	52%	+3%
Council tax	N/A		36%	60%	60%	58%	50%	54%	54%	55%	+1%
Water bill	21%	21%	33%	52%	58%	46%	46%	47%	45%	48%	+3%
Mortgage / rent	22%	19%	28%	50%	57%	52%	54%	55%	53%	49%	-4%
Car tax / insurance	21%	18%	27%	45%	50%	45%	48%	48%	44%	43%	-1%
Personal loan repayments	15%	22%	21%	43%	50%	44%	44%	38%	42%	45%	+3%
Holidays	24%	21%	21%	42%	49%	43%	40%	42%	42%	40%	-2%
Phone / broadband bill	19%	20%	26%	44%	47%	45%	40%	43%	36%	37%	+1%
TV licence	17%	14%	20%	32%	34%	35%	29%	31%	30%	29%	-1%
Streaming subscription	11%	12%	13%	27%	33%	27%	31%	30%	22%	26%	+4%

Q3. Which, if any, bills or costs are you worried about paying?
Base: April 2025 (excluding those who said 'not applicable' - base varies per bill; n= 525-999)

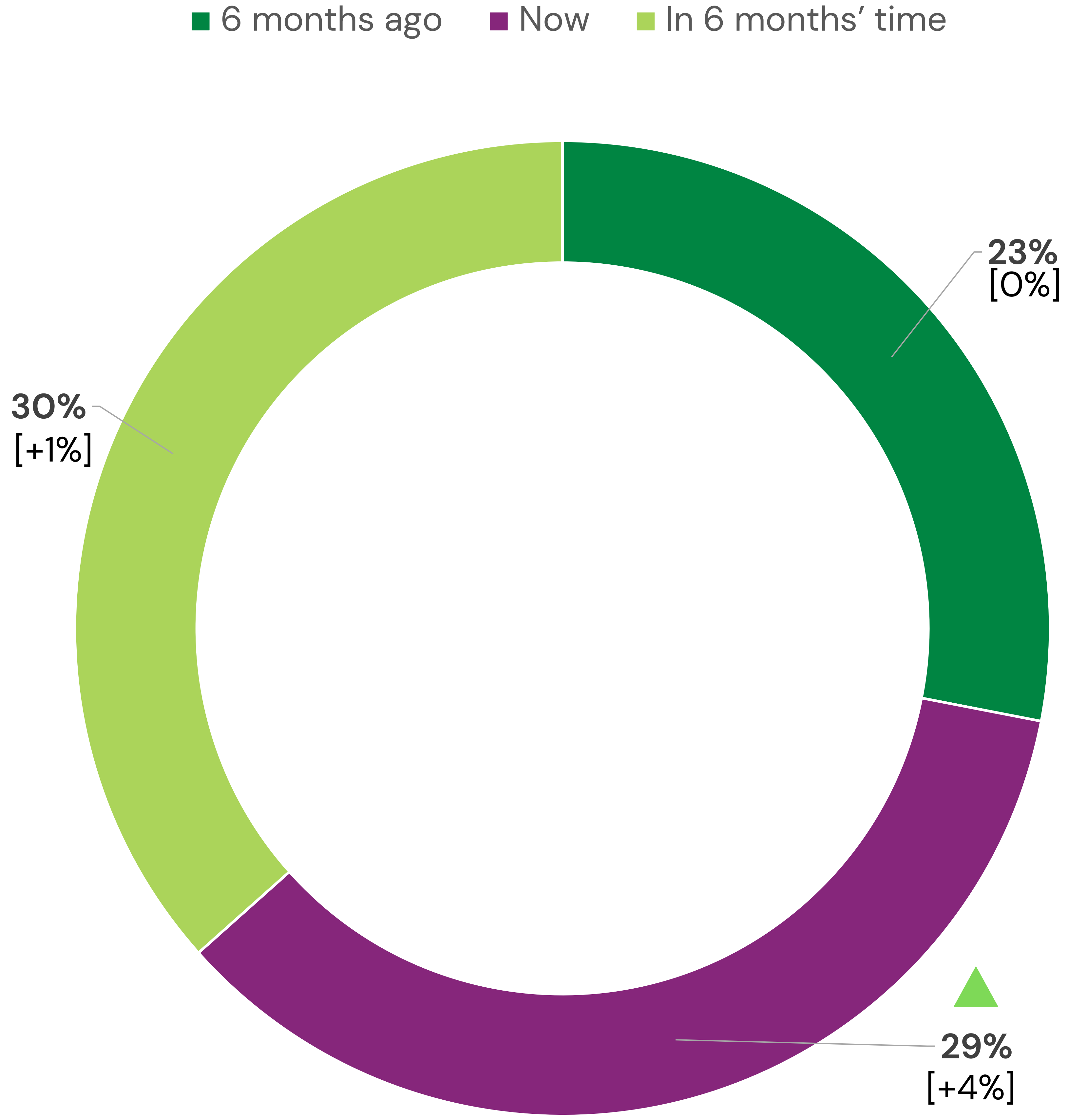
Significant difference at 95% CI

Customers are finding it more difficult to meet monthly bill payments currently than they were six months ago. After a steady decline in previous waves, difficulty with meeting water bill payments increased by 4% in April 2025.

NET Difficult – Difficulty with meeting monthly bill payments (general)



NET Difficult – Difficulty with meeting monthly bill payments (water)



Females were significantly more likely to find it extremely difficult to meet monthly payments on bills generally and water bills than males.

To note, during this fieldwork period, there was media coverage regarding national water bills increasing.

Q4. How difficult would you say it is for your household to meet the monthly payments on your bill?
Q5. And, specifically, how difficult would you say it is for your household to pay your water bill?
Base: April 2025 (n=1000)

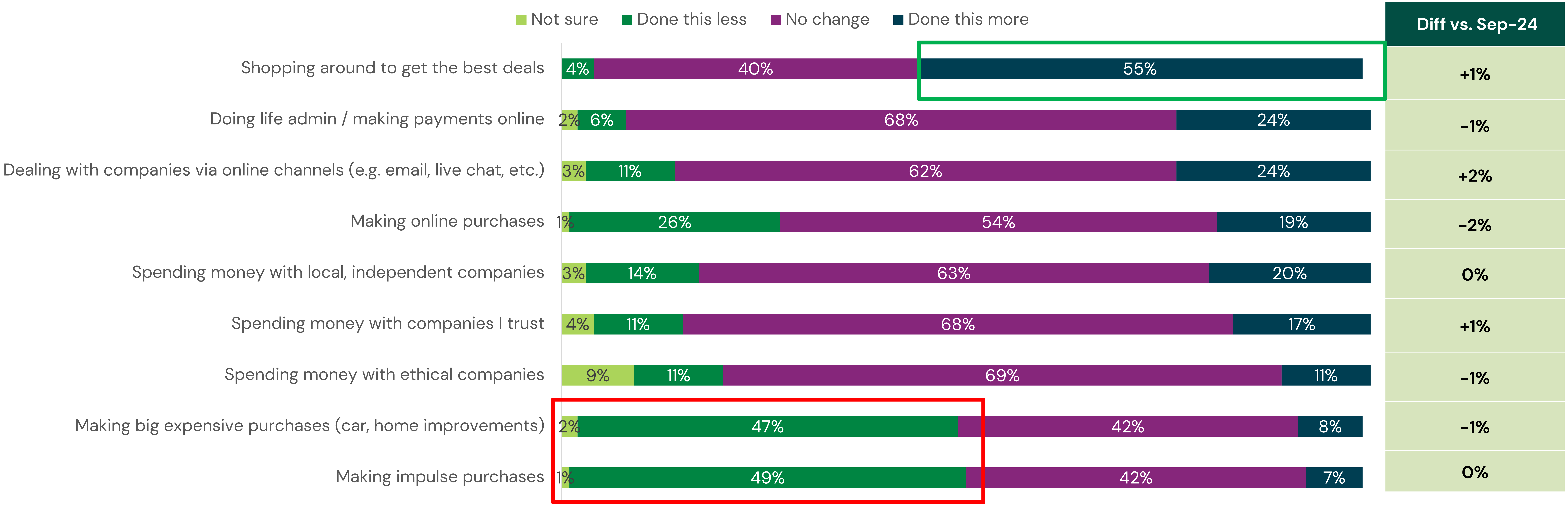
[%] difference since September 2024

Significant difference at 95% CI

Reported changes in shopping behaviours reflected previous waves with shopping around for the best deals most commonly highlighted as being “done more” in the last six months. Impulsive and expensive purchases remain the behaviours respondents were most likely to be doing less of.

Those from Merseyside were significantly more likely to shop around for the best deals than those from Cumbria or Lancashire.
Males were significantly more likely to have made a big expensive purchases than females.

Changes in shopping behaviour vs. 6 months ago

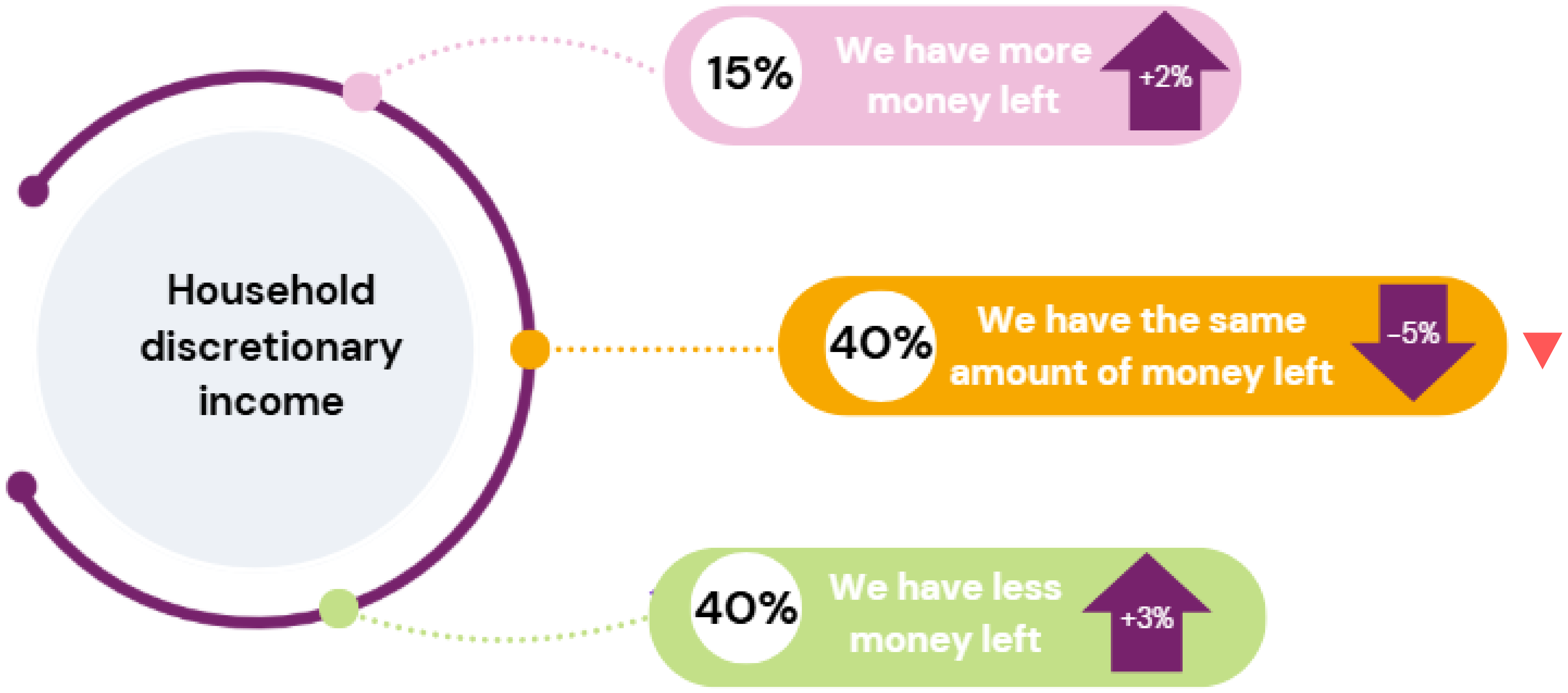


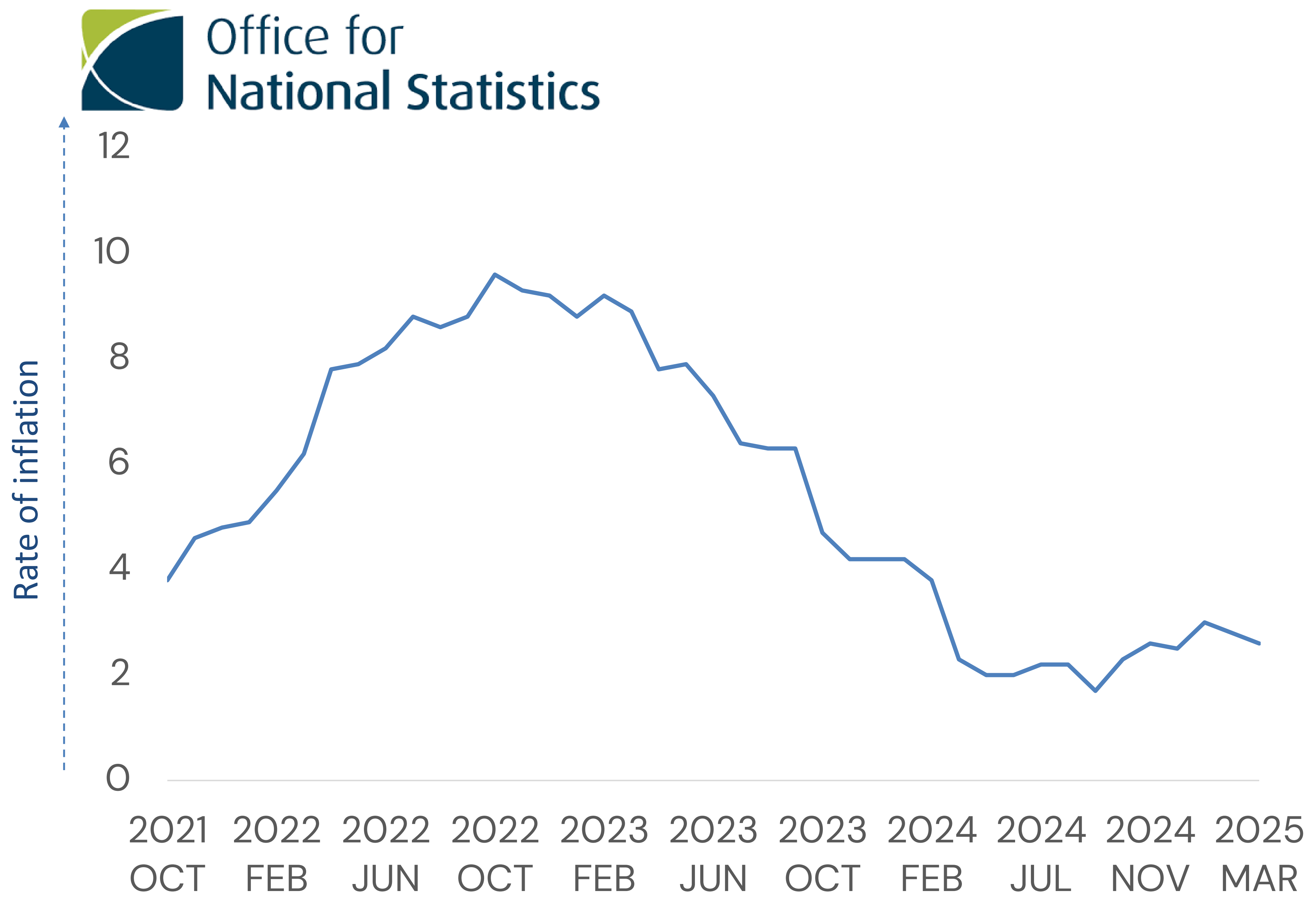
Q6. How have each of the following changes for you compared to 6 months ago?
Base: April 2025 (n=1000)

Significant difference at 95% CI

Significantly less customers agreed that they had the same amount of discretionary income compared to six months ago (40%). 40% agreed they had less discretionary income, increasing by 3%. There was a 2% increase in those who had more discretionary income, however this group represented only 15% of the sample.

Those living with a partner and children under 18 were significantly more likely to have more money left than those living with family over 18 or partners with children that have left home.
18-39 year olds were significantly more likely to have more than those 40+.
Greater Manchester were significantly more likely to have more than Cheshire.





Q6. How have each of the following changed for you compared to 6 months ago?
Base: April 2025 (n=1000)
Source: [Consumer price inflation, UK - Office for National Statistics]

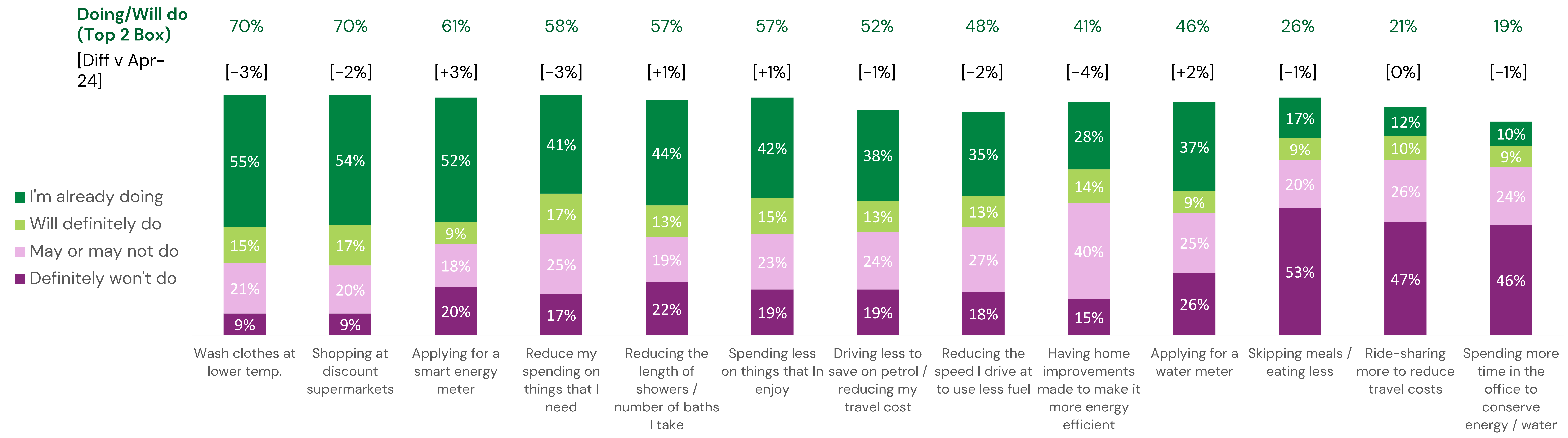
[%] difference since September 2024

Significant difference at 95% CI

When considering customer behaviours regarding budgeting and spending, washing clothes at a lower temp and shopping in discount stores were most common with respondents doing these already or planning to. Having home improvements returned the highest decrease (-4%).

Those retired and unemployed were significantly more likely to be doing/will do reducing showers.
Those 30-59 were significantly more likely to be doing/will do spending less on things they enjoy.
Males were significantly more likely to be doing/will do applying for a water meter.

Behaviour changes to save money



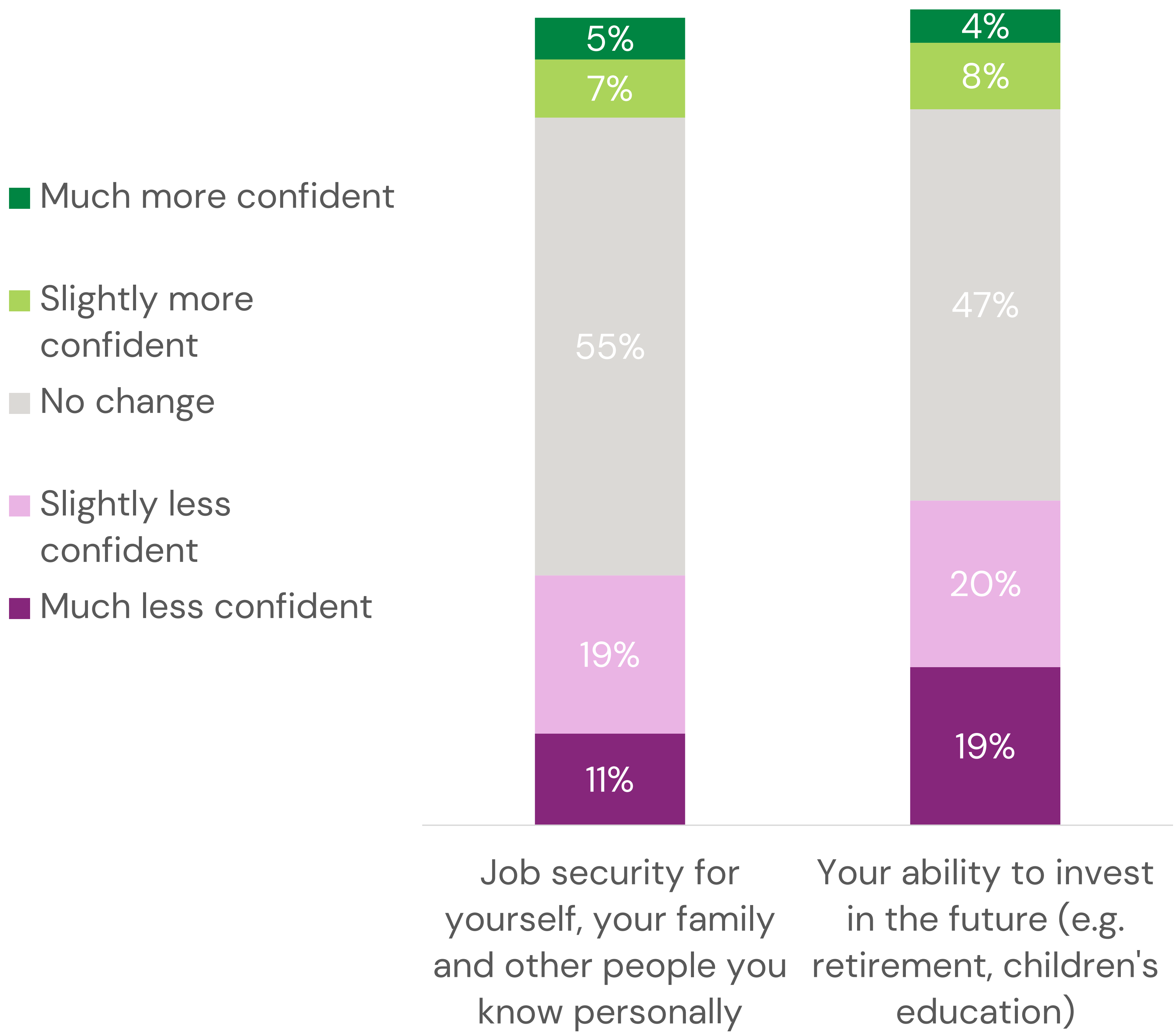
Q7. To what extent are you doing any of these this year in relation to your budgeting and spending?
Base: April 2024 (n=1000)

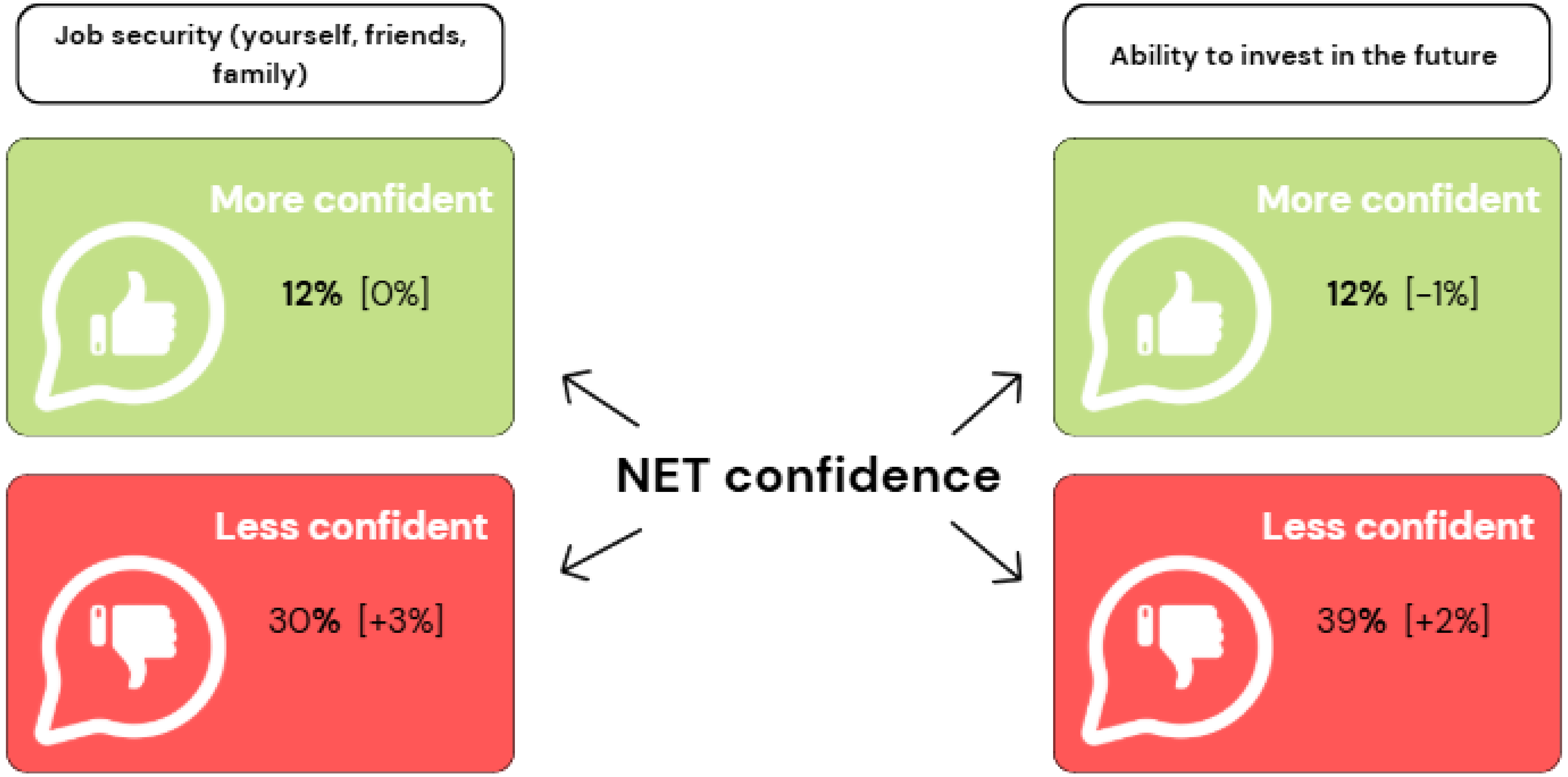
Significant difference at 95% CI

A higher proportion of respondents stated they felt less confident compared to six months ago in terms of both job security and the ability to invest in the future.

Those from Merseyside were significantly less confident in job security than those from Cumbria.
18-39 year olds were significantly more confident in their ability to invest in future than those 40+.
Overall financial confidence improved amongst 18-39 year olds this wave.

Financial confidence vs. 6 months ago





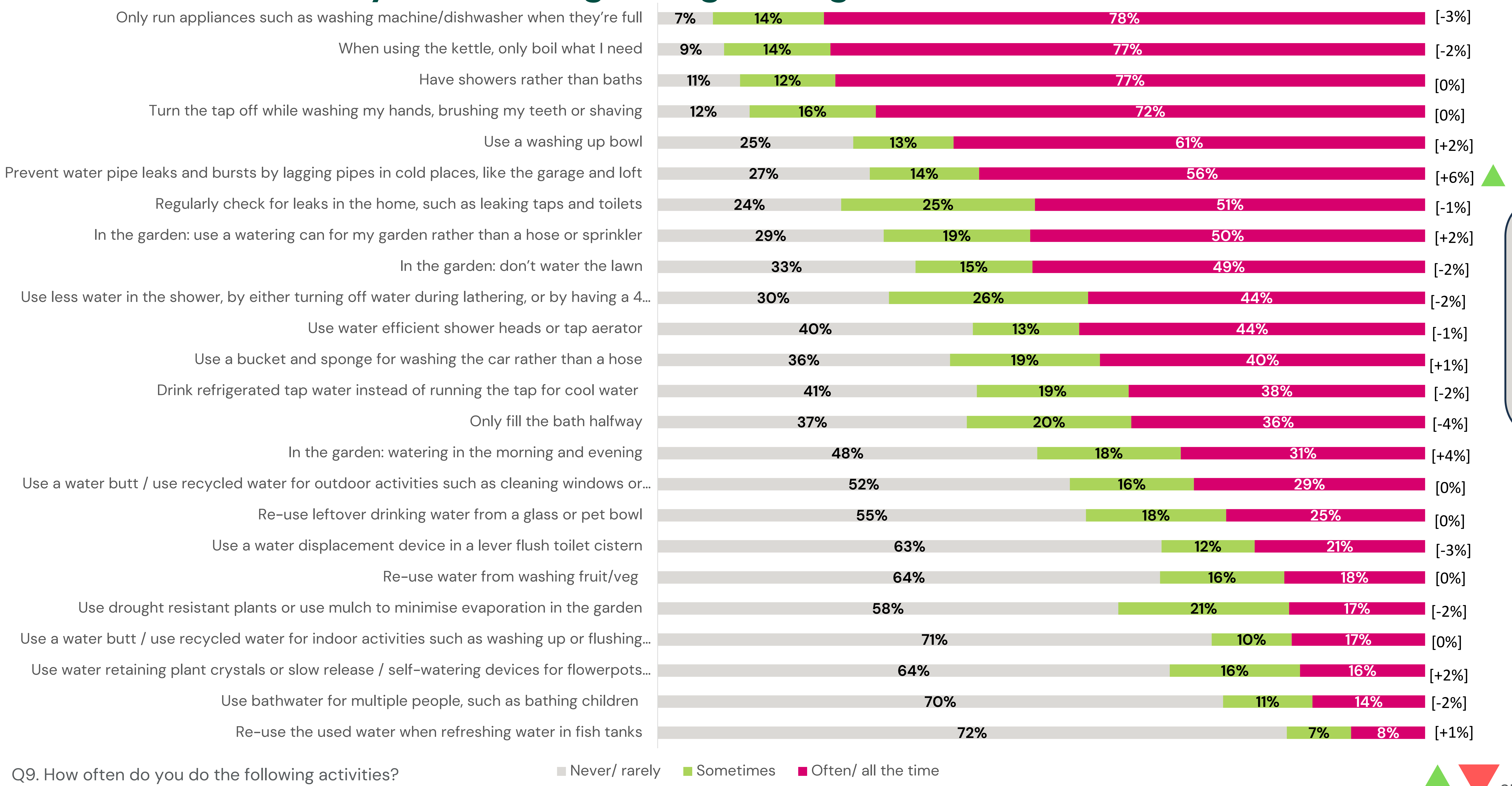
Q8. Compared to 6 months ago, how confident do you feel about…
Base: April 2025 (n=1000)

[%] difference since September 2024

Significant difference at 95% CI

Water Efficiency & Flushing Behaviours

Most customers only run appliances when they're full, only boil the kettle with what is needed or have showers over baths. The biggest increase was seen in customers actively preventing water pipe leaks and bursts (+6). Due to the dry weather experienced, customers may have been influenced by comms regarding leakages.

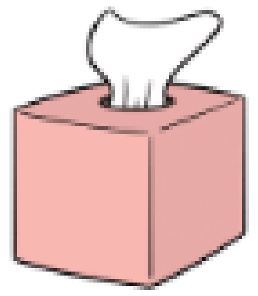


In the Flow members were significantly more likely to regularly check for leaks in the home than non-members. These members may have previously engaged with content on the community website which has increased their awareness in this area.

Q9. How often do you do the following activities?
Base: April 2025 (n=1000)

Significant difference at 95% CI

There was little change in flushing behaviour this wave. Moist toilet tissue wipes continued to be the most commonly flushed item (17%).

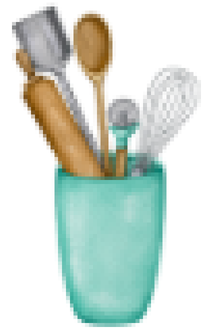


Hygiene / Personal care

Moist toilet tissue wipes	17%	[+2%]
Tissues (not toilet tissues)	13%	[0%]
Tampon	6%	[+2%]
Dental floss	4%	[+1%]
Cotton Buds	4%	N/A
Condoms	4%	[+1%]
Baby wipes	3%	[0%]
Cotton pads	3%	[0%]
Cigarettes	3%	[0%]
Period pads / liners	3%	[+1%]
Bladder weakness products	2%	[+1%]
Contact lenses	2%	[0%]
Make-up wipes	2%	[0%]
Tampon applicator	1%	[0%]
Nappies	1%	[0%]
Plasters	1%	[0%]

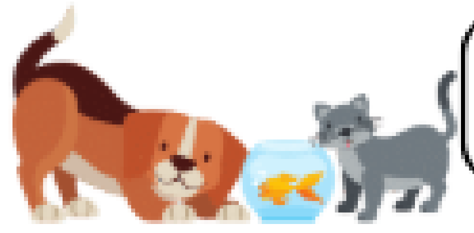
Cleaning

Cleaning / disinfectant wipes	4%	[+1%]
Contents of vaccum cleaner	1%	[-1%]



Kitchen

Food waste	7%	[0%]
Cooking fats / oils	7%	[0%]
Kitchen towel	5%	[+1%]



Pets

Pet hair / human hair	13%	[+1%]
Pet mess	6%	[+1%]
Pets that have passed away	1%	[0%]

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

55% of customers had NOT disposed of any of the above via toilet, sink or drain in the last 6 months

Those aged 30-39 were significantly more likely to have flushed items down the toilet beyond toilet tissue.

Q10. Which, if any, of the following have you disposed of down the toilet or sink/drain in the past 6 months?
Base: April 2025 (n=1000)

[%] difference since September 2024

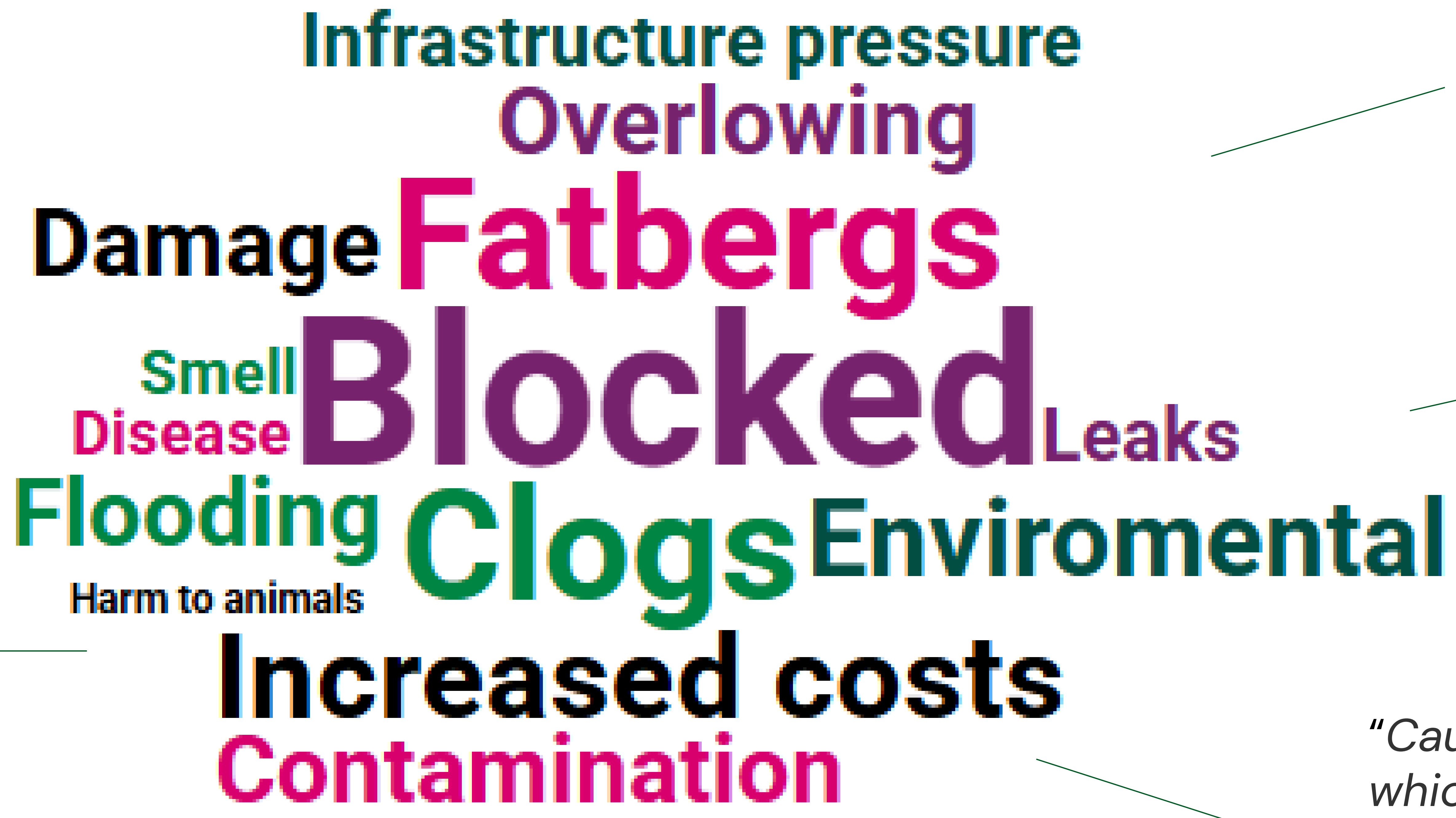
Significant difference at 95% CI

98% correctly identified the various consequences of disposing products down the toilet, sink or drain. This is a slight 1% increase from September 2024.

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

*"It will block the drain and cause further **blockages** in local water pipes"* **92%**

"It's wrong to flush non bio degradable items down the toilet as it's blocks drains and **pollutes** rivers and the sea" ***7%***



"Blocked drains, pollution, **higher costs** at water cleaning facilities" ***4%***

*"**Fatbergs**, general blockages causing problems with the water flow"* ***4%***

*"Cause blockages which can lead to burst pipes , **flooding** etc"* ***5%***

Q11. What do you think are some of the possible consequences of items being flushed down the drain when they shouldn't be?
Base: April 2025 (n=1000) (Excluding nothing/don't know/N/A, and 'other' base is n=977. % is based off this figure)

Significant difference at 95% CI

Across most items, a higher percentage stated they had disposed of them when they did not have a bin in their bathroom.

Hygiene / Personal care	Total	Has a bin (809, 81%)	No bin (189, 19%)
Moist toilet tissue wipes	17%	18%	13%
Tissues (not toilet tissues)	13%	12%	15%
Tampon	6%	7%	3%
Dental floss	4%	3%	5%
Cotton Buds	4%	4%	4%
Condoms	4%	4%	5%
Baby wipes	3%	3%	4%
Cotton pads	3%	2%	4%
Cigarettes	3%	3%	5%
Period pads / liners	3%	2%	5%
Bladder weakness products	2%	2%	2%
Contact lenses	2%	2%	3%
Make-up wipes	2%	2%	1%
Tampon applicator	1%	1%	2%
Nappies	1%	1%	0%
Plasters	1%	1%	1%

	Total	Has a bin	No bin
Cleaning			
Cleaning / disinfectant wipes	4%	4%	6%
Contents of vaccum cleaner	1%	1%	2%
Kitchen			
Food waste	7%	8%	6%
Cooking fats / oils	7%	6%	9%
Kitchen towel	5%	5%	6%
Pets			
Pet hair / human hair	13%	13%	17%
Pet mess	6%	6%	7%
Pets that have passed away	1%	1%	0%

Q10. Which if any of the following items have you disposed down the toilet or sink/drain in the past 6 months? SPLIT BY Q12. Do you have a bin in your bathroom?
Base: April I2025 (n=1000)

Significant difference at 95% CI

Customer Priorities for United Utilities

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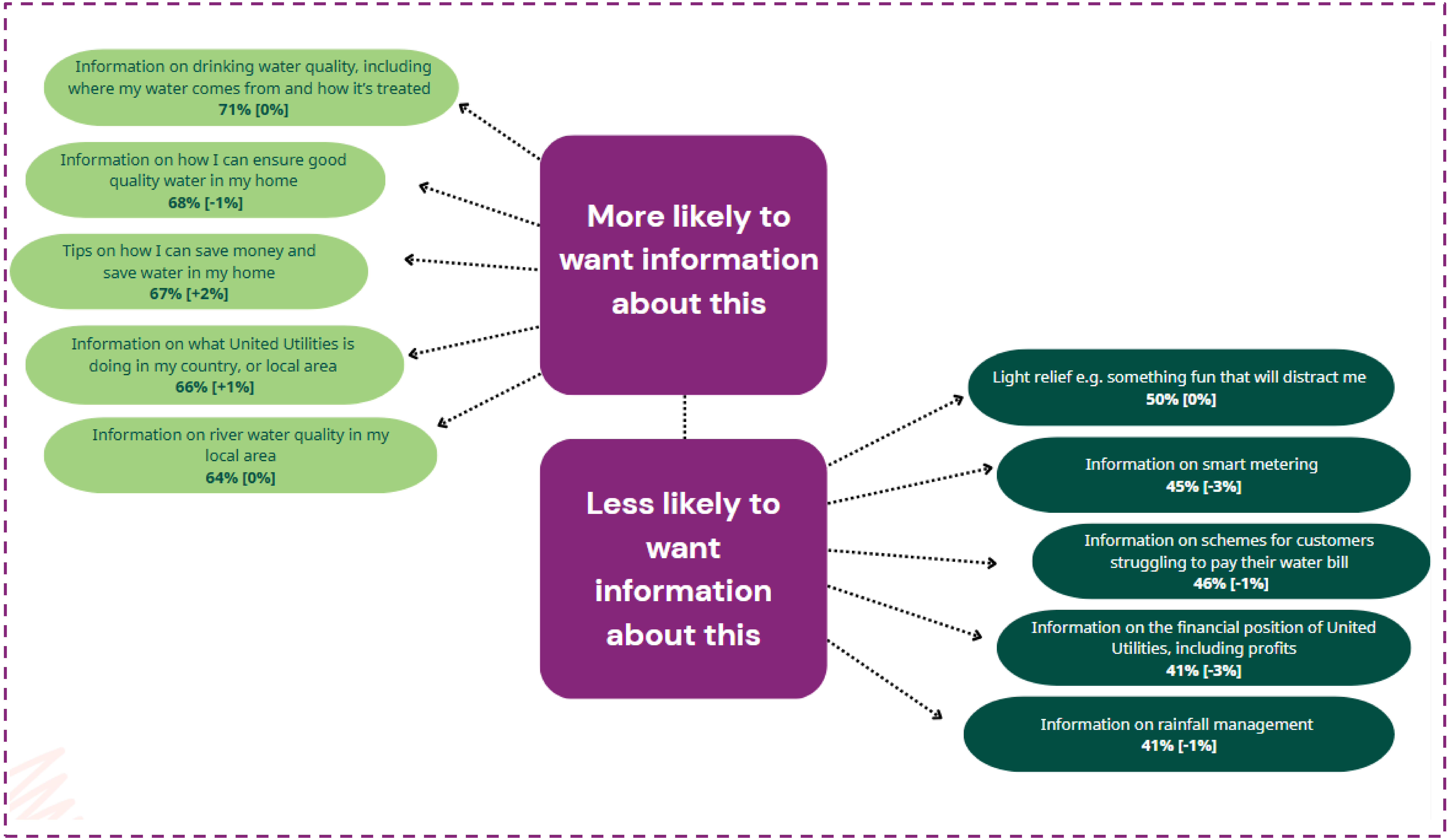
Water for the North West

in the flow
on behalf of United Utilities
Water for the North West

explain

Respondents were interested in receiving a range of comms.

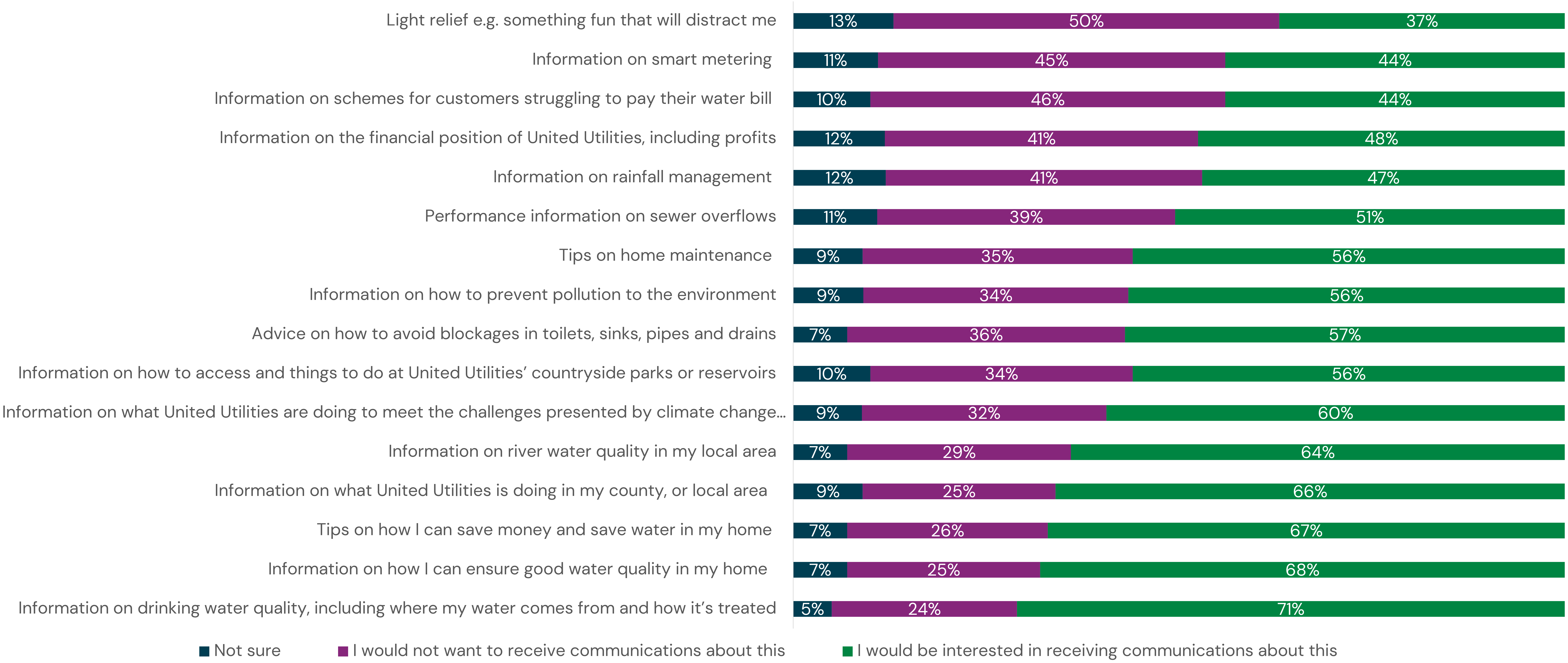
[%] difference since September 2024



Q13. Which of the following type of communication would you be open to receiving from United Utilities?
Base: April 2025 (n=1000)

Significant difference at 95% CI

Interest in receiving comms from United Utilities



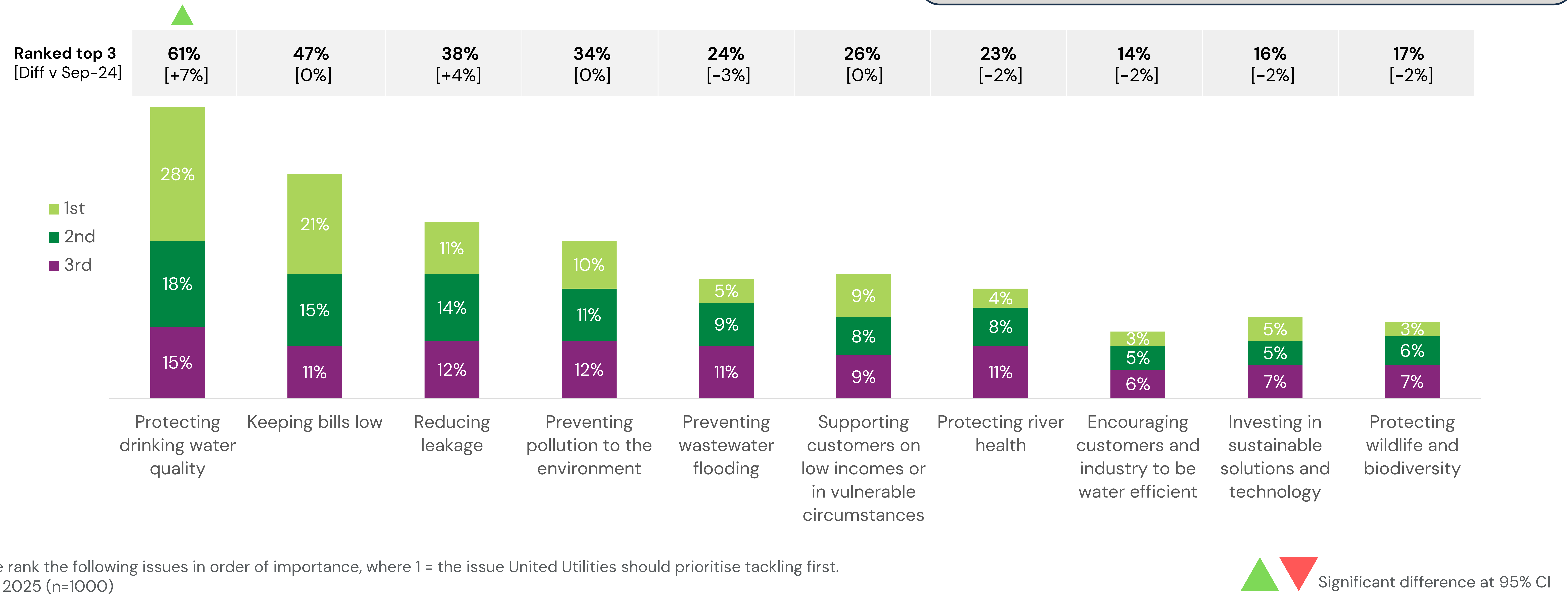
Q13. Which of the following type of communication would you be open to receiving from United Utilities?
Base: April 2025 (n=1000)

Significant difference at 95% CI

When prioritising the issues United Utilities should tackle first, there was no change in the top three. Protecting drinking water and reducing leakage remained in the top 3 and also achieved the biggest % increases. Keeping bills low remained in the top three, but with no change in %.

Those 70+ were significantly more likely to rank protecting drinking water quality as their top priority than those 30-59.
Females were significantly more likely to rank supporting customers on low incomes or in vulnerable circumstances as their top priority.

Important issues for United Utilities to be tackling



Q14. Please rank the following issues in order of importance, where 1 = the issue United Utilities should prioritise tackling first.
Base: April 2025 (n=1000)

Unprompted, customers were asked if there was anything they'd like to see United Utilities do more of. Reductions in bills, less leakage, reduction of dividends, and investment into infrastructure were highlighted most often.

Additional requests for United Utilities to do more of

Cheaper bills / rates / rewards (25%)

- *"Cheaper bills"*
- *"Better value for money they receive"*
- *"Just trying to keep our bills low. There has been a big increase this year and we are on a meter and are very careful to minimise our water usqge"*

Stop sewage leakage/water pollution (16%)

- *"Preventing sewage run off particularly on the coast"*
- *"Do more to prevent damage to rivers and make it so our waters are clean and safe to swim in and to drink"*

Reduce dividends / bonus to shareholders (12%)

- *"Reducing or stopping dividends being paid to shareholders"*
- *"Stop wasting money and giving higher ups profits when people are struggling to pay bills"*

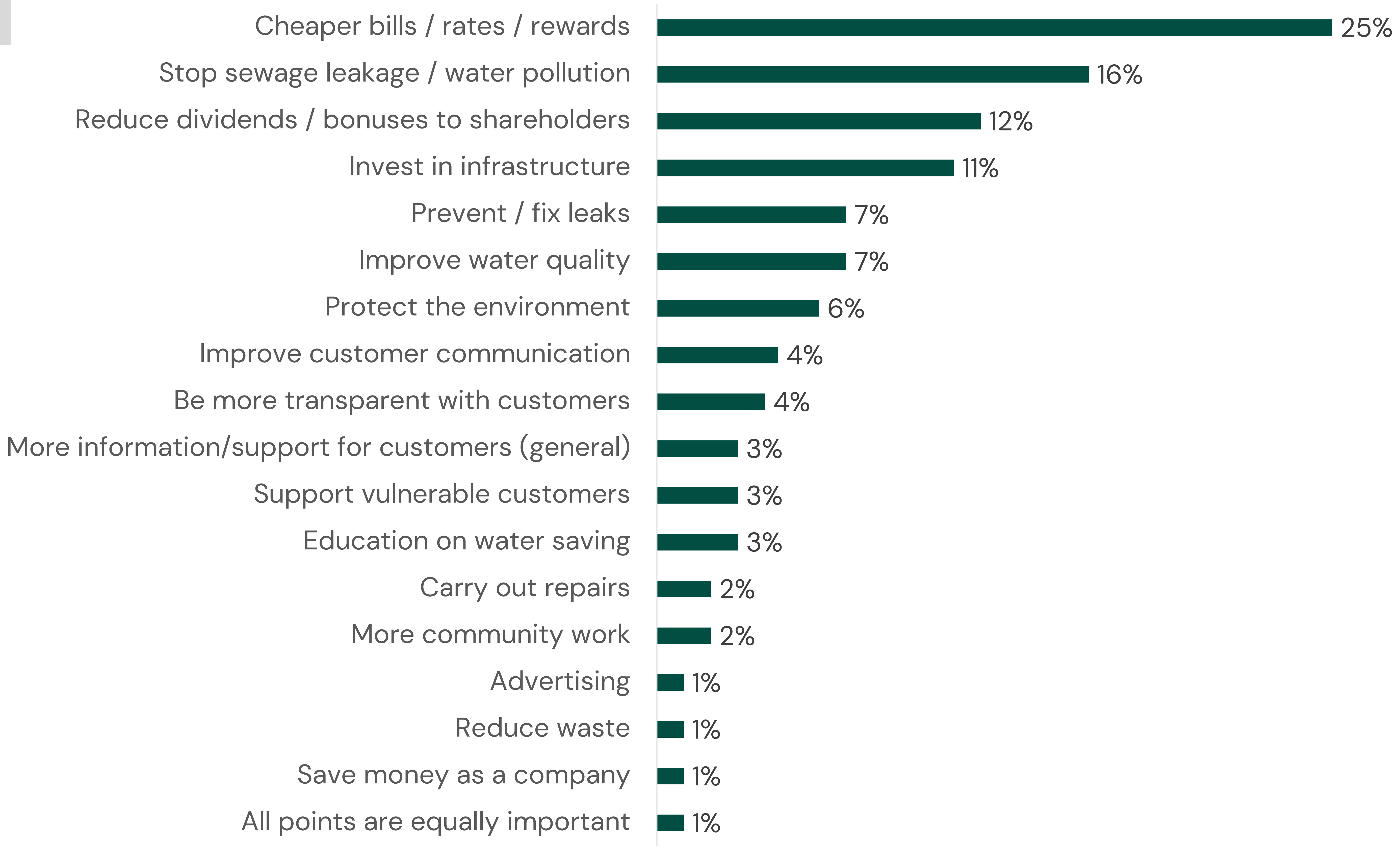
Invest in infrastructure (11%)

- *"Spend more on upgrading failing water mains instead of waiting for a burst then patching that particular pipe when the rest of that same pipe is failing badly in the same road"*
- *"Sustainability initiative and infrastructure upgrades"*

Q15. Is there anything else you'd like to see United Utilities do more of?
Base April 2025; Coded themes from n=1000 open ended responses (Excluding nothing/don't know and N/A, base is n=445. % is based off this figure

After an increase of 3% this wave, cheaper bills was the most requested from customers, bypassing the previous top answer of stopping sewage leakage and water pollution.

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



Q15. Is there anything else you'd like to see United Utilities do more of?
Base April 2025; Coded themes from n=1000 open ended responses (Excluding nothing/don't know and N/A, base is n=445. % is based off this figure

Environmental Attitudes & Behaviours

United Utilities
Water for the North West

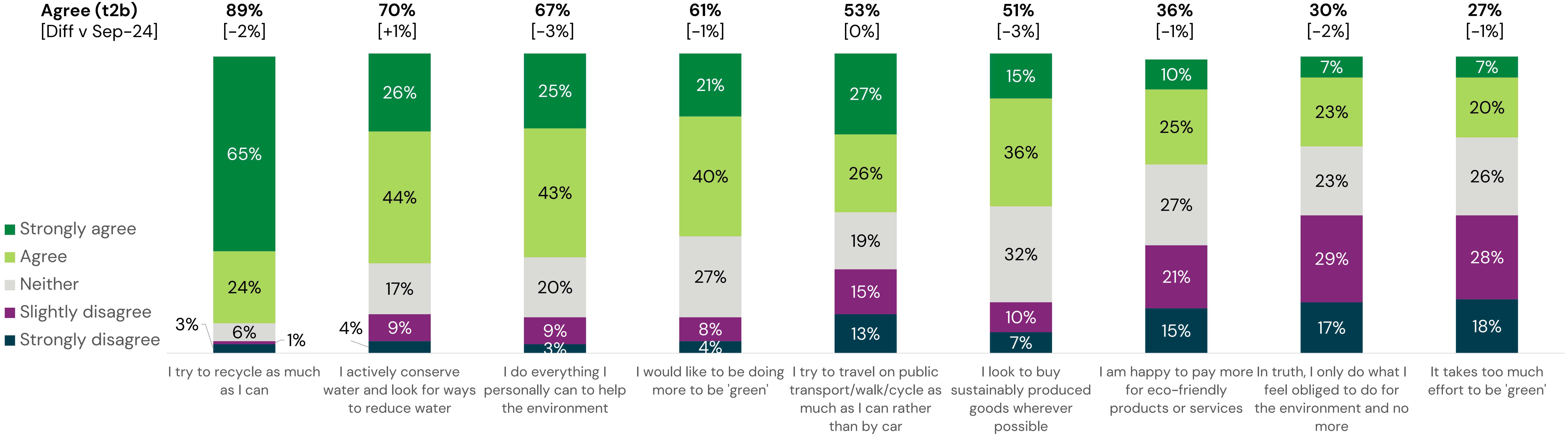
in the flow
on behalf of United Utilities
Water for the North West

explain

A slight increase (+1%) was shown in those who actively try to conserve water. All other behaviours saw either no change or a decrease. Around 9 in 10 customers continue to recycle as much as they can.

Metered customers were significantly more likely to strongly agree they actively conserve water than unmetered and future customers.
70+ were significantly less likely to strongly agree that it takes too much effort to be green than those 18-59.

Attitudes towards the environment

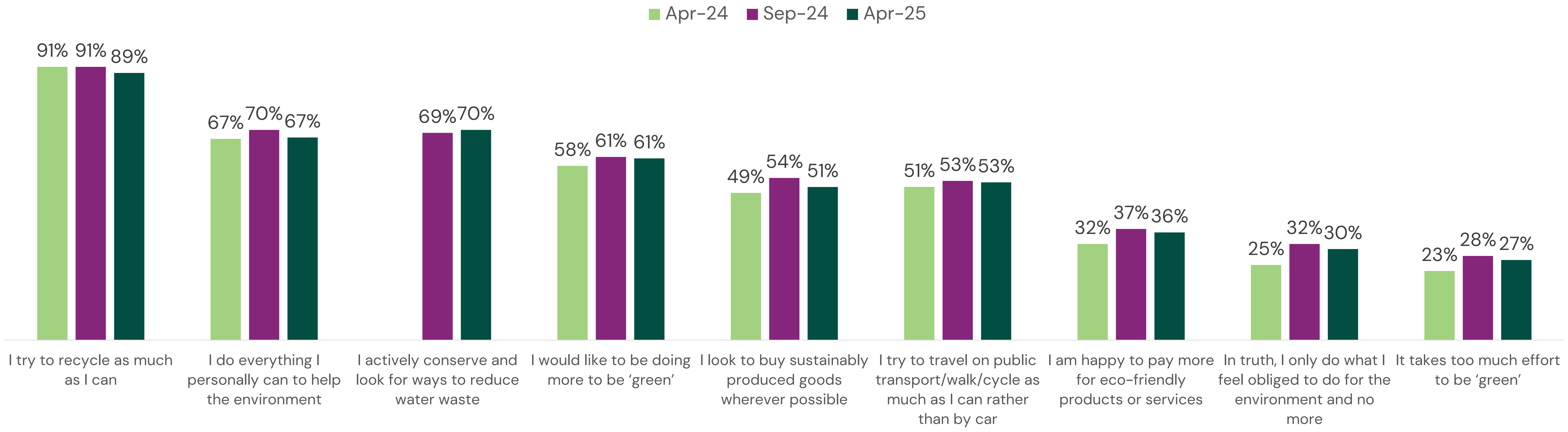


Q16. How much do you agree or disagree with the following statements?
Base: April 2025 (n=1000)

Significant difference at 95% CI

April 2025 saw less customers indicating their attempt to engage with environmentally conscious behaviours. The only increase this wave was shown with those actively conserving or reducing their water.

Attitudes towards the environment (Strongly agree / somewhat agree)



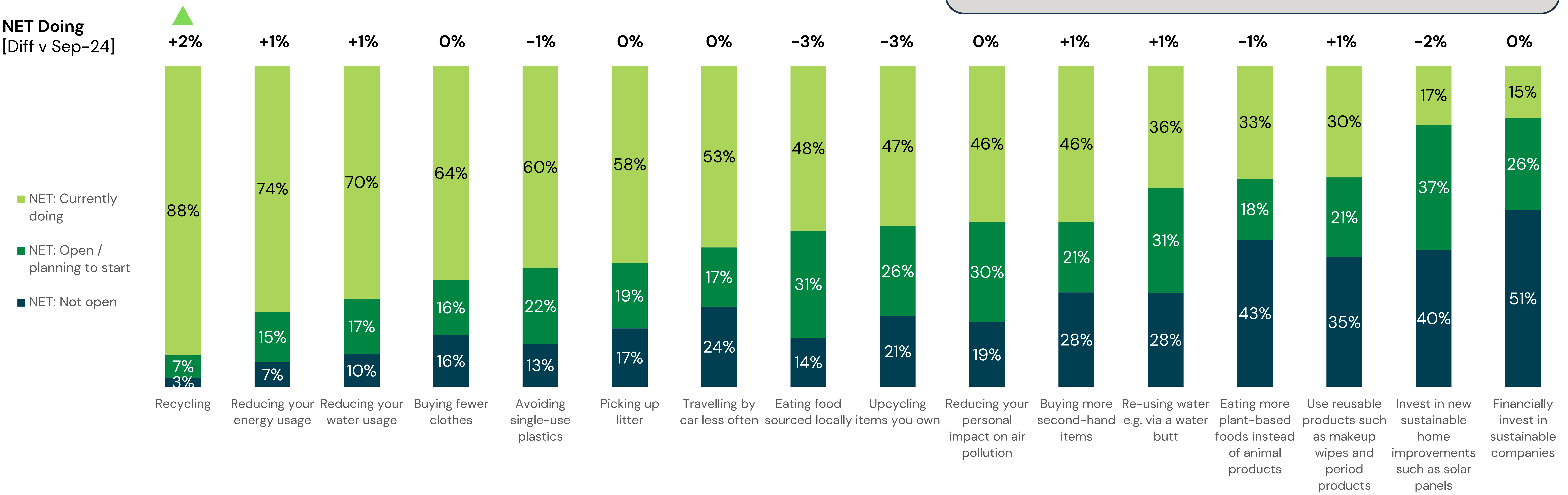
Q16. How much do you agree or disagree with the following statements?
Base: April 2025 (n=1000)

Significant difference at 95% CI

Recycling continues to be the behaviour adopted by the majority (88%) of customers followed by reducing energy usage (74%). The biggest decreases in behaviours were customers eating locally sourced food and upcycling items they own with -3% each.

Engaging in pro-environmental behaviours

Those from Greater Manchester were significantly less likely to have been recycling for a long time than any other region.
Those 70+ were significantly less likely to be open to eating food sourced locally than those 18-69.



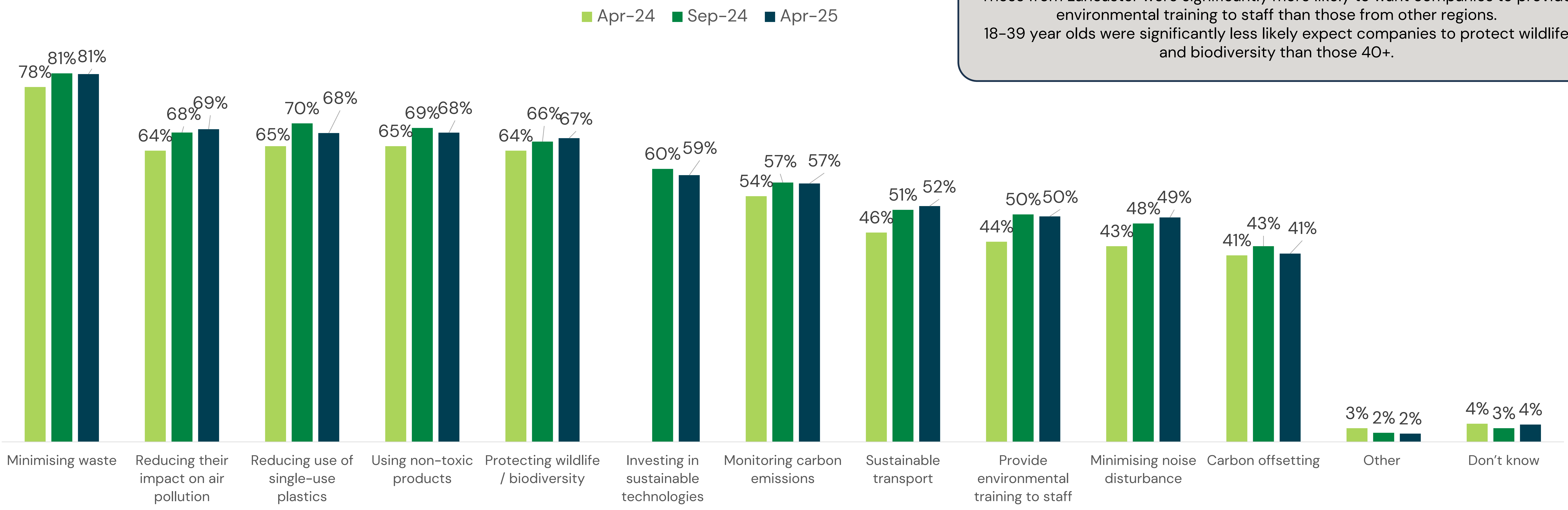
Q17. How would you describe your behaviours towards each of the following sustainable activities?
Base: April 2025 (n=1000)

Significant difference at 95% CI

Expectations of the actions of companies remained relatively consistent this wave with minimising waste, reducing impact on air pollution and reducing single use plastic the most common expectations.

Expectations of companies

Those from Lancaster were significantly more likely to want companies to provide environmental training to staff than those from other regions.
18-39 year olds were significantly less likely expect companies to protect wildlife and biodiversity than those 40+.



Q18. Which of the following would you expect companies to be doing as part of their standard operating procedures?
Base: April 2025 (n=1000)

Significant difference at 95% CI

Recap

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on behalf of United Utilities
Water for the North West

explain

Recap

Immigration became a bigger concern when comparing this time last year after achieving a significant increase. The economy, health and crime remained the three areas of highest concern.

While still a key point, less customers highlighted sewage leaks as a main area of focus. Climate change also returned a decrease in April 2025.

A higher focus on financial concerns was shown this year. Significantly less people reported the same levels of discretionary income compared to six months ago.

The vast majority continued to be aware of the consequences of flushing, though this does not necessarily stop it from happening with only around half never disposing items down toilets, sinks or drains.

Most customers only run appliances when they're full, only boil the kettle with was is needed or have showers over baths. The biggest increase was seen in customers actively preventing water pipe leaks and bursts (+6).

Customers are finding it more difficult to meet water bill payments currently than they were six months ago, with females finding this significantly more difficult.

Cheaper bills was most the most common request from customers, bypassing the previous top answer of stopping sewage leakage and water pollution.

Appendix

Data statement

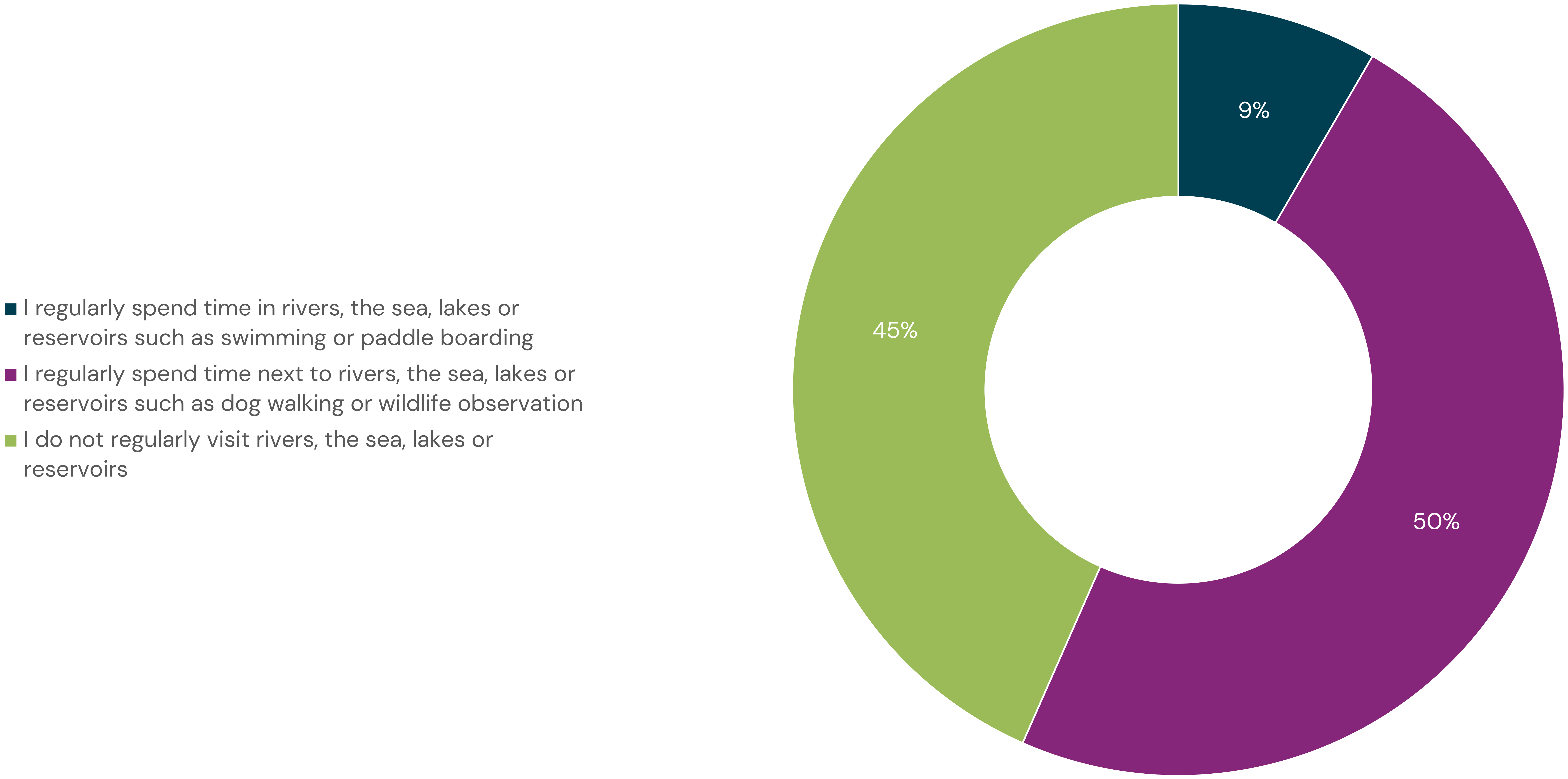
There is a very small proportion of In the Flow community members who do not have demographic information available due to missing profile data. These have been classified as 'prefer not to say' and 'other'. In order for the sample to meet quotas which are representative of United Utilities customers on the external panel, 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 while 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 ⅓ of the total LOI (20 minutes) and poor verbatim (gibberish, random characters and profanities).

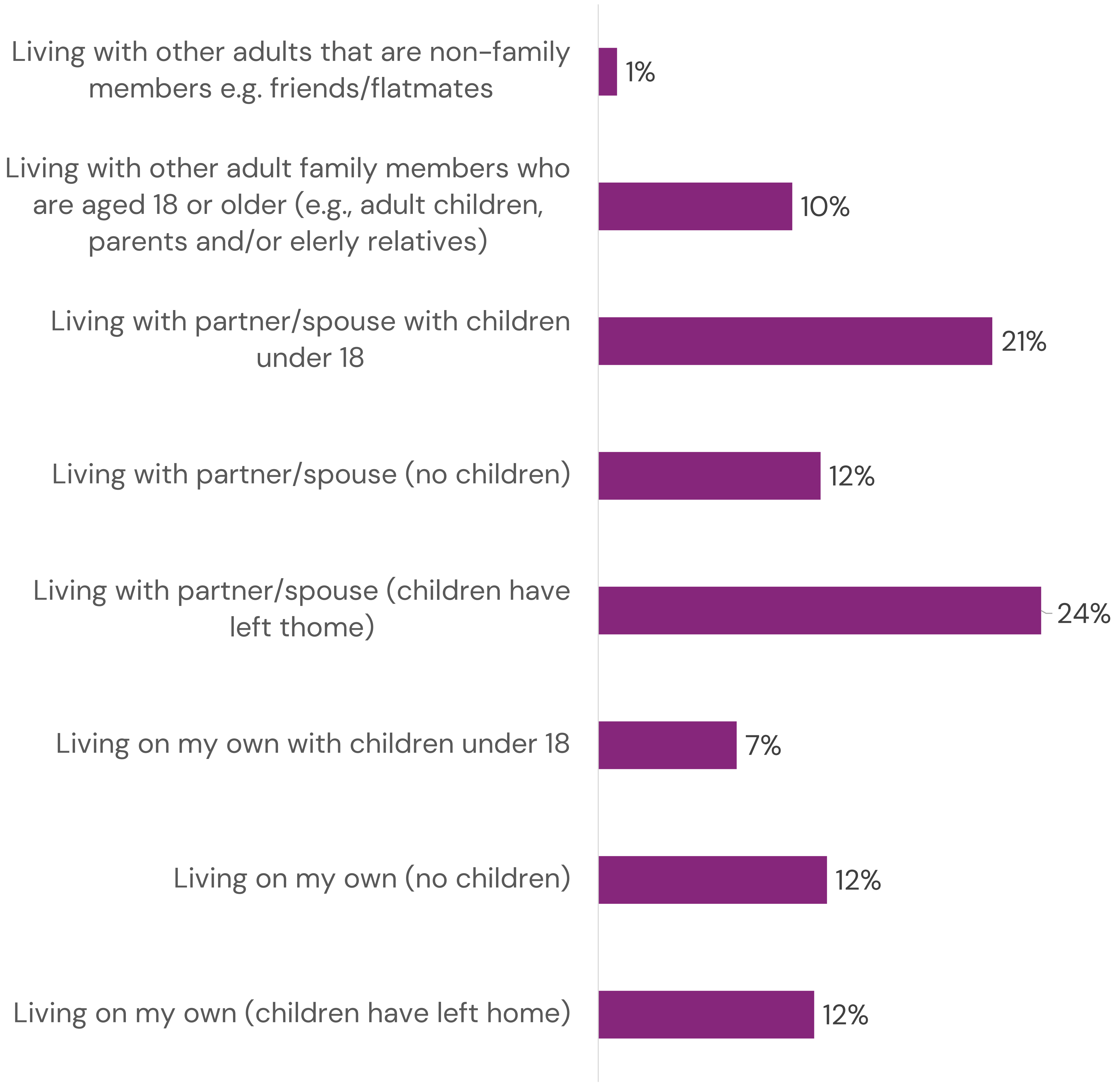
All statistical significance has been calculated using a Z-Test between subgroups across all options.

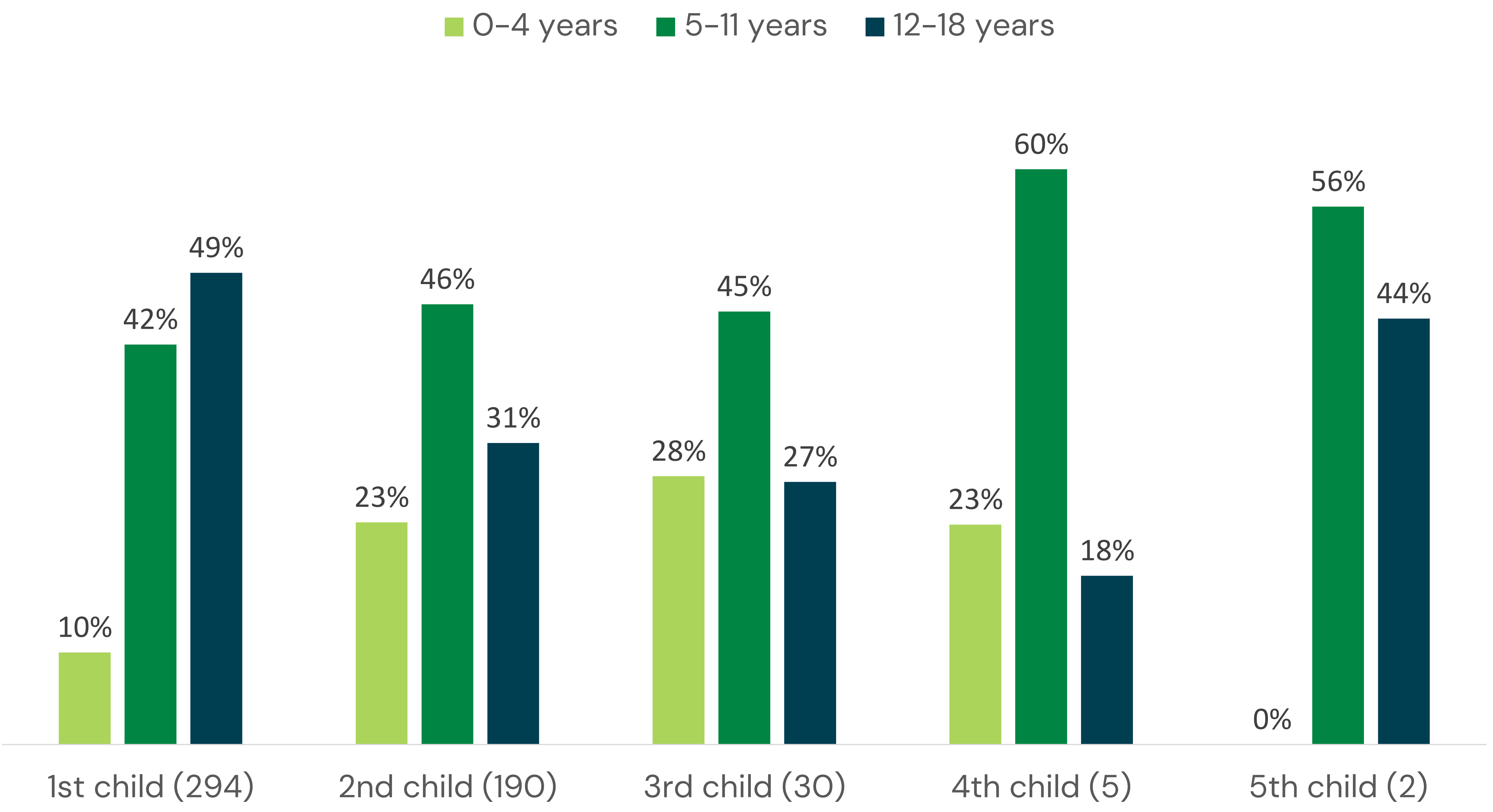
Use of rivers, the sea, lakes and reservoirs



Q19. Please select all that apply
Base: April 2025 (n=1000)

Household status

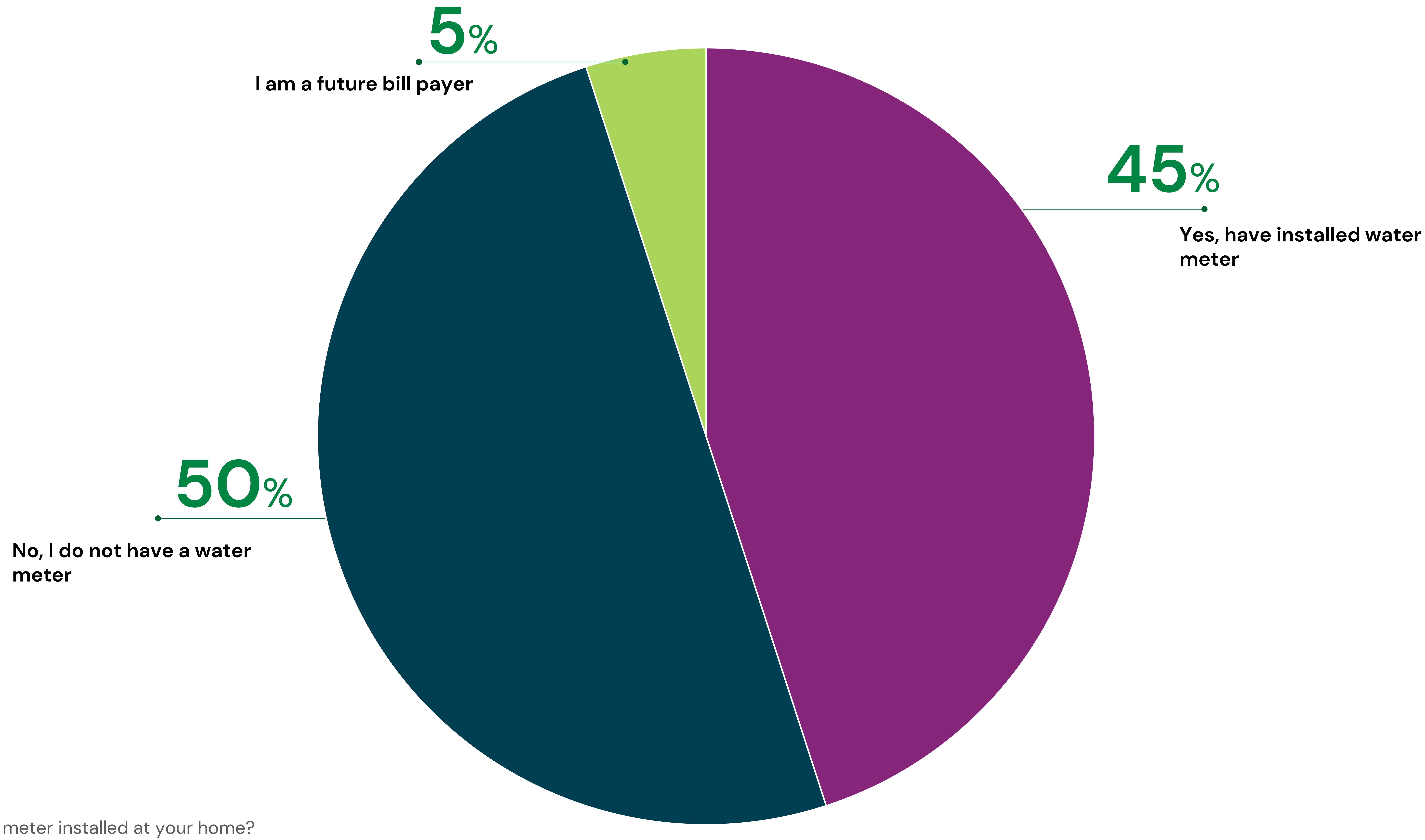




Q20. Please could you confirm which household situation best applies to you?
Base: April 2025 (n=1000)

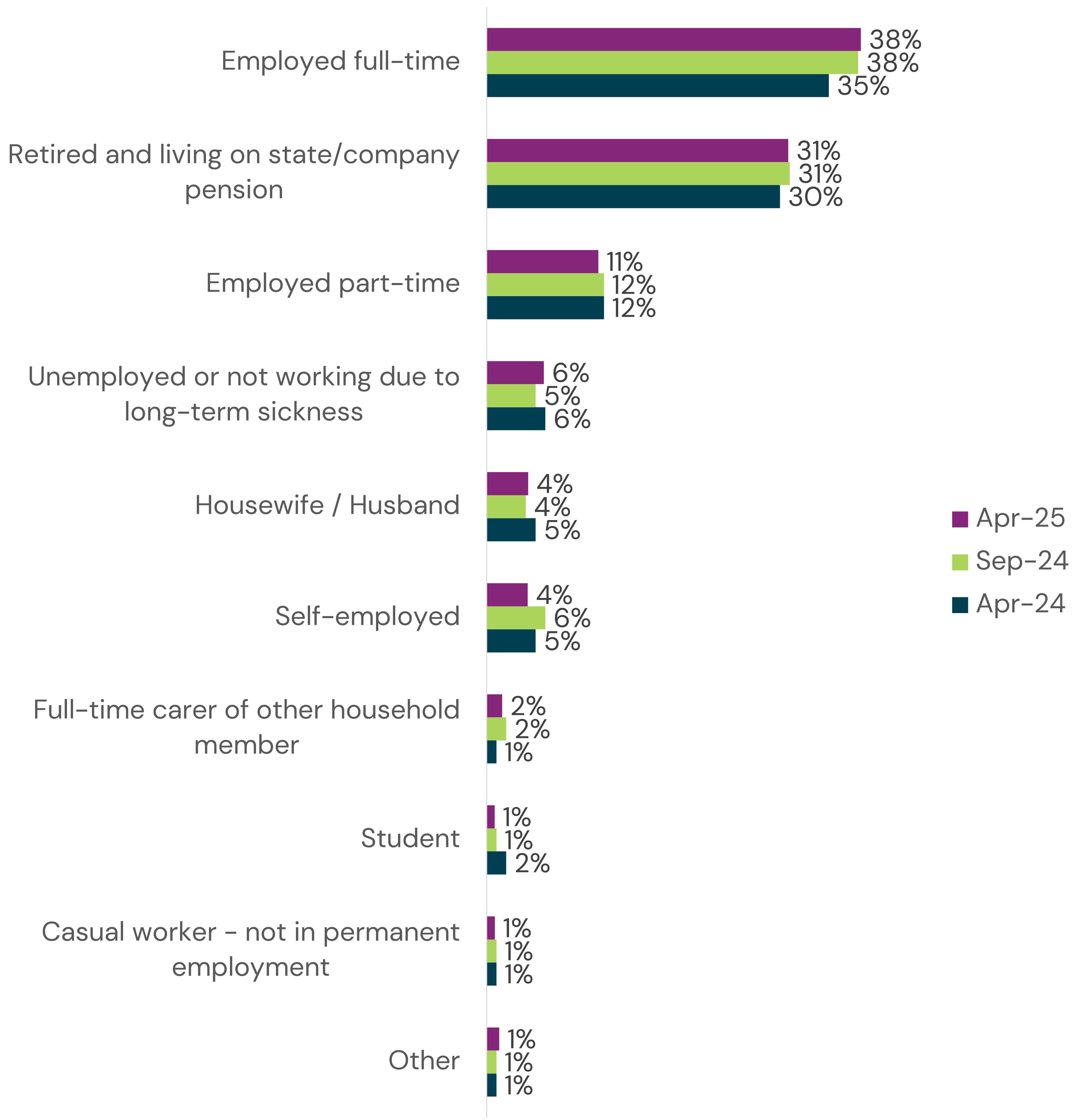
Q21. You said you have children under 18 living at home. In what year were each of your children who are under 18 born?
Base: April 2025 (n=285)

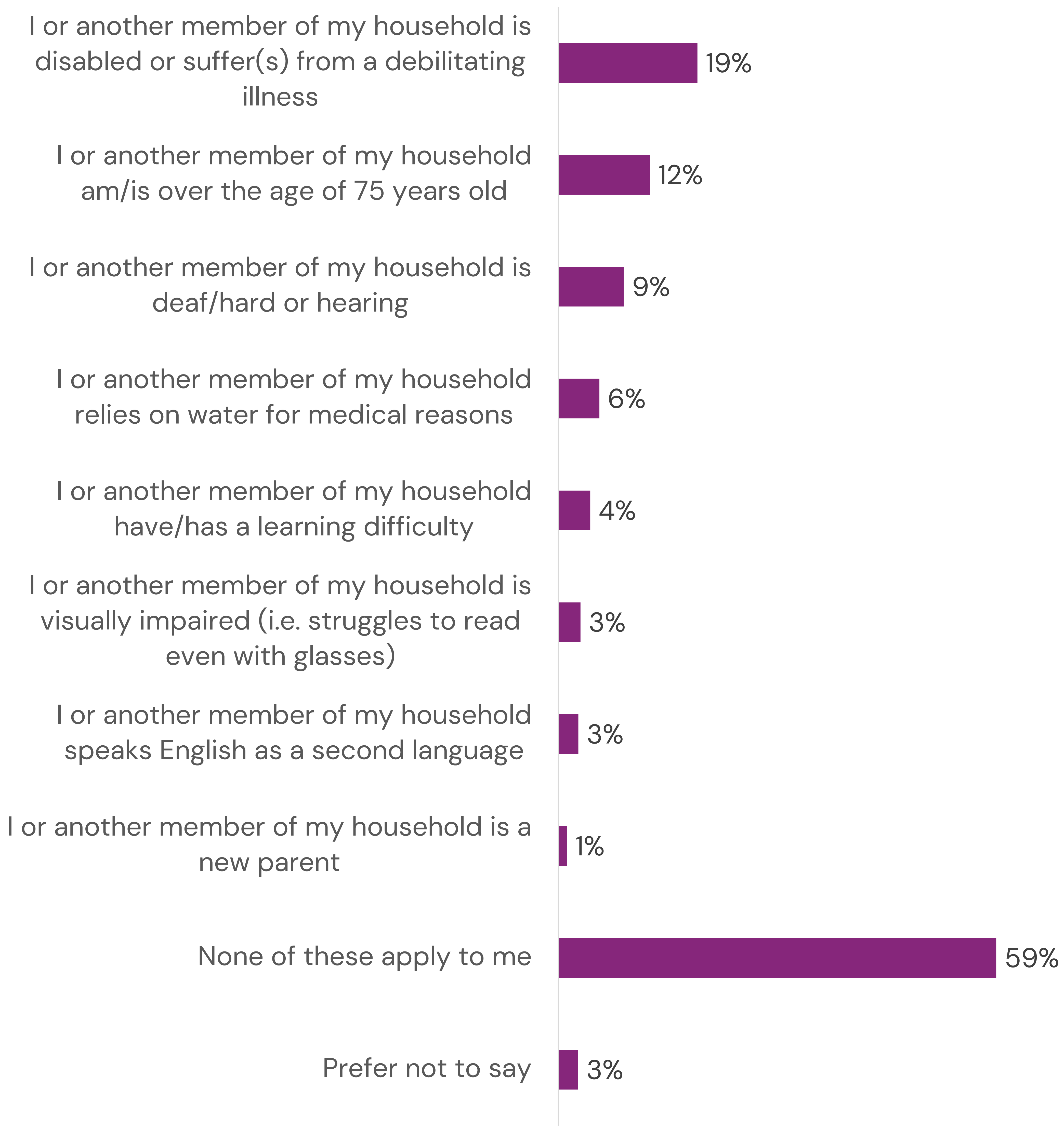
Metered vs. Unmetered weighted



Q22. Do you have a water meter installed at your home?
Base: April 2025 (n=1000)

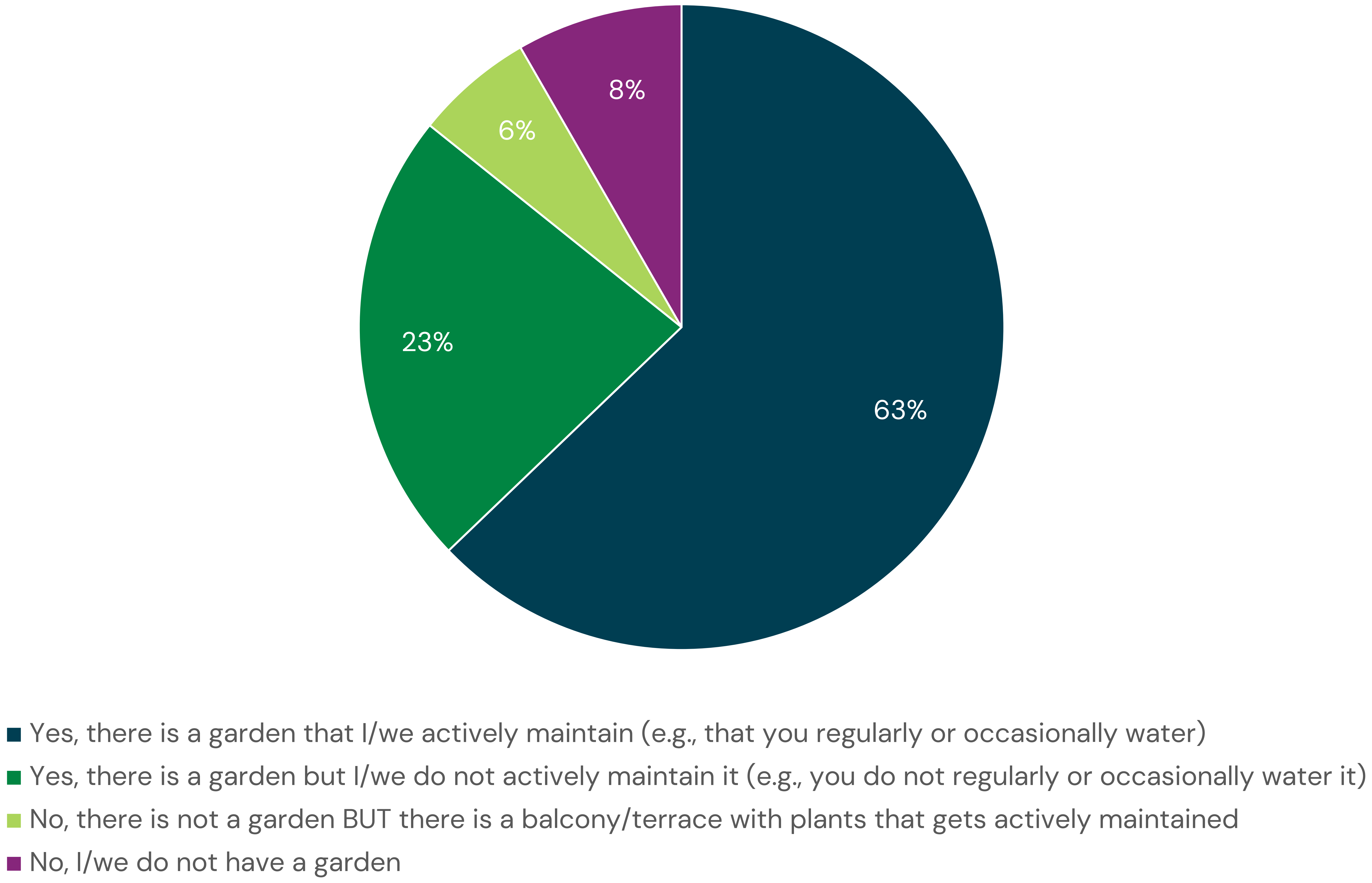
Employment status





Q23. Which of the following applies to you?
Q25. Which of the following applies to you?
Base: April 2025 (n=1000)

Garden access

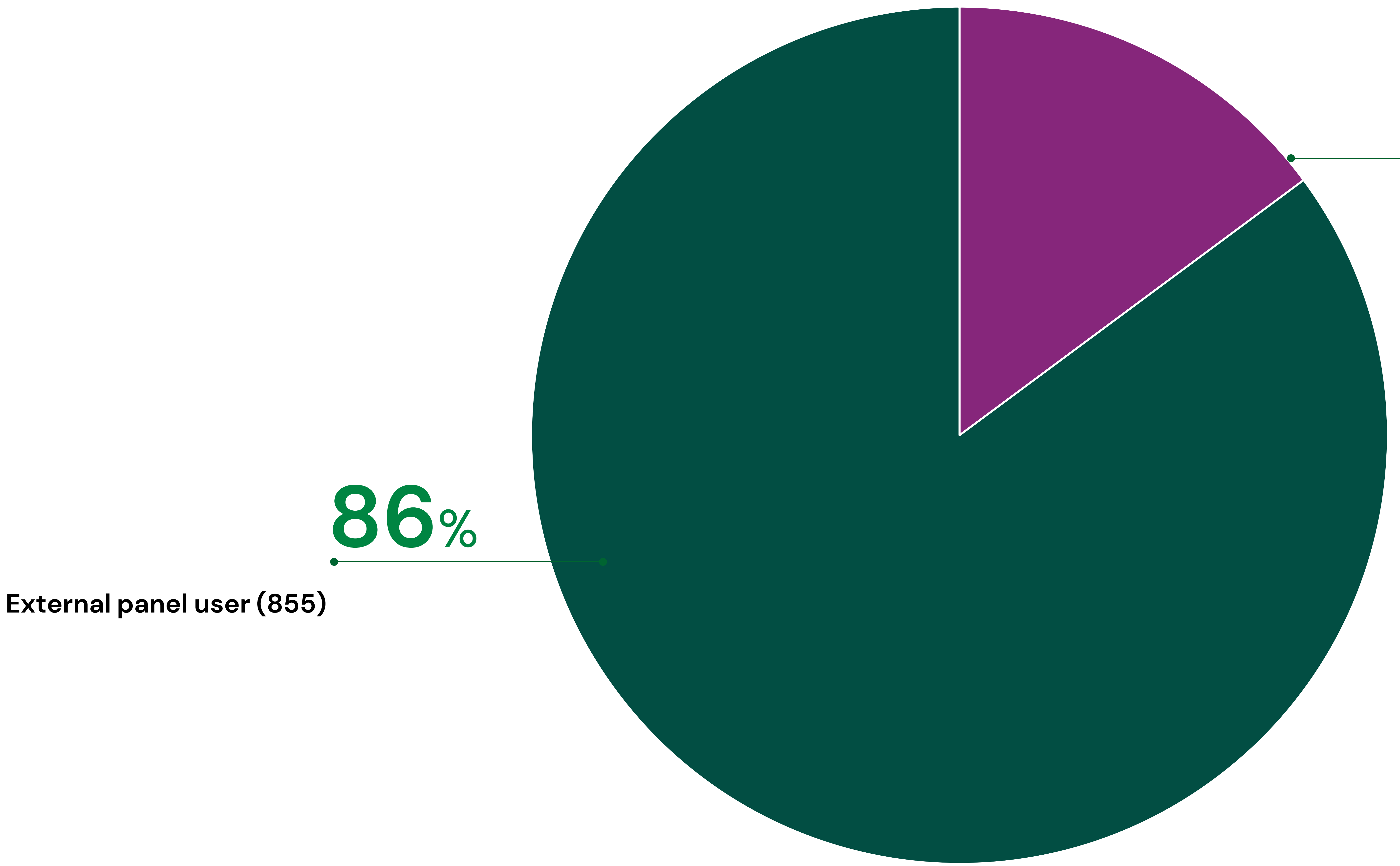


Q24. Does the property you live in have a garden?
Base: April 2025 (n=1000)

Sample profile

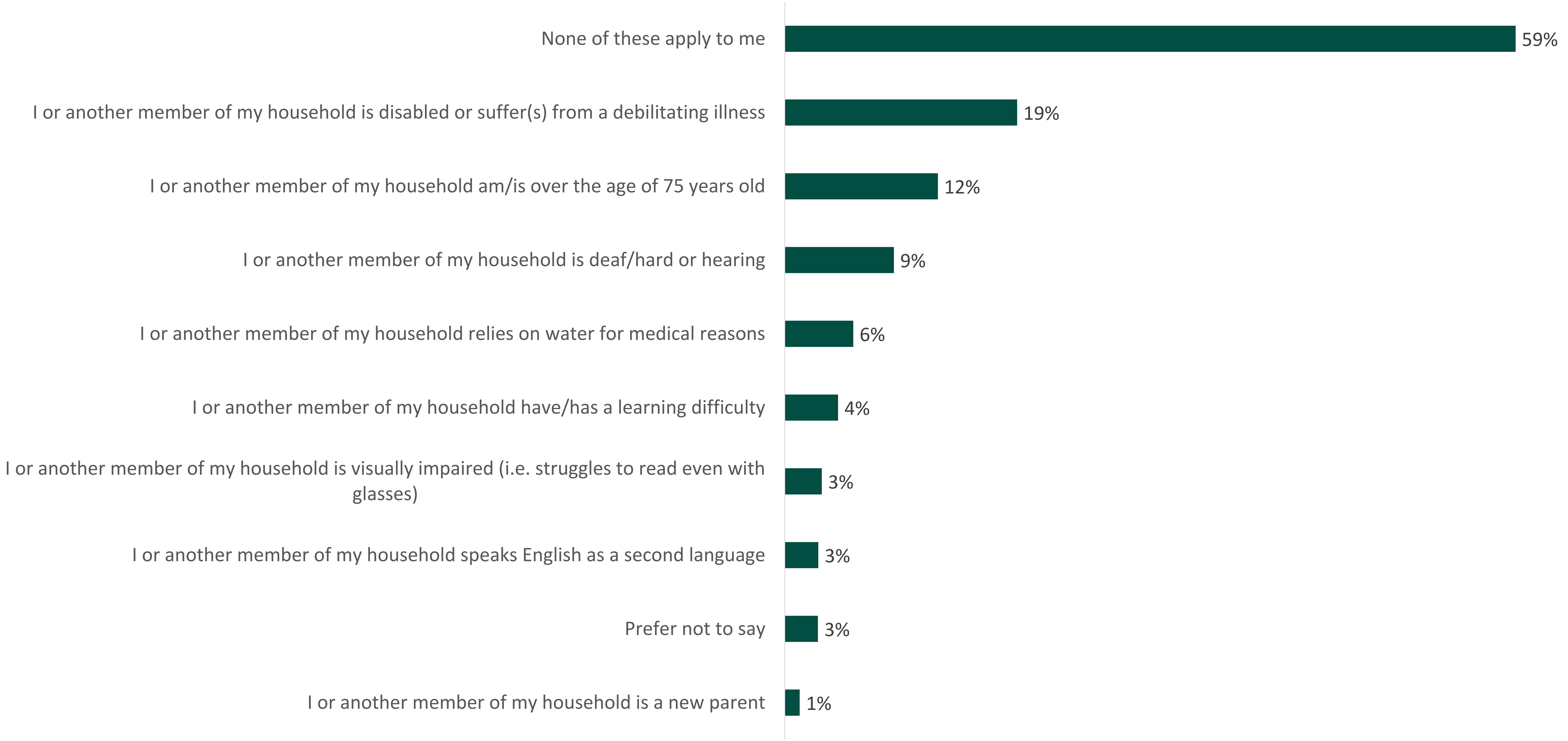
Total	Unweighted		Weighted	
	Count	%	Count	%
Gender				
Male	442	44%	490	49%
Female	556	56%	510	51%
Age				
18-29	84	8%	80	8%
30-39	165	17%	160	16%
40-49	175	18%	170	17%
50-59	197	20%	200	20%
60-69	154	15%	160	16%
70+	223	22%	230	23%
Region				
Cheshire	150	15%	140	14%
Cumbria	97	10%	90	9%
Greater Manchester	367	37%	370	37%
Lancashire	218	22%	200	20%
Merseyside	167	17%	200	20%

Fieldwork breakdown unweighted



Base : April 2025 (n=1,000)

Vulnerability



Q25. Which of the following apply to you?
Base : April 2025 (n=1,000)

The ‘In the Flow’ community

Jenny Fathers, Customer Insight Specialist

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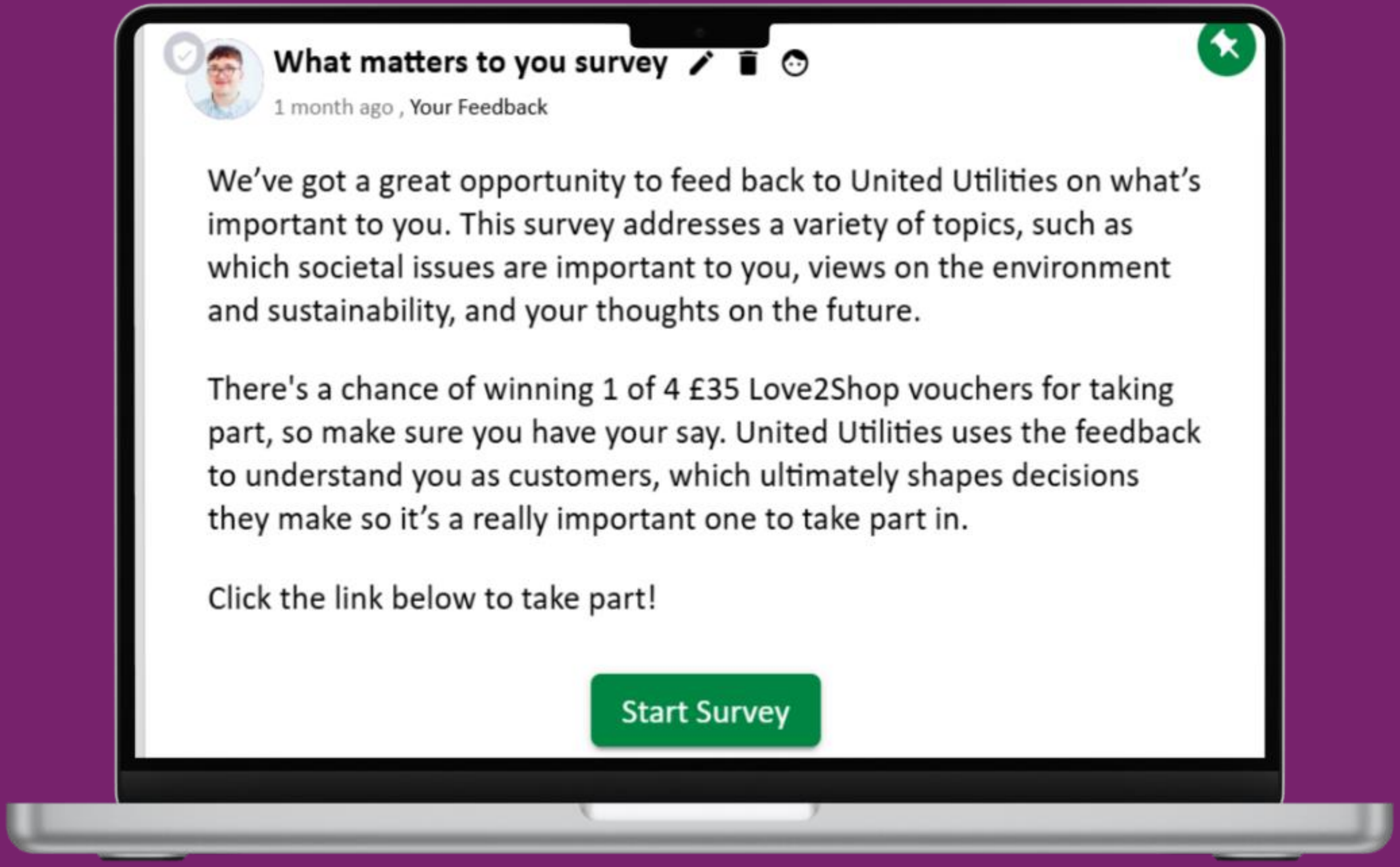
Haweswater House

In the Flow is our online research panel. It is an online community of over <u>1300</u> United Utilities customers who participate in research activities to help us understand what customers want and value.

There are lots of different ways we can engage with our customers, such as polls, discussion posts and surveys.

- Have you got an idea you want to test with real list customers?
- Do you have upcoming communications going out to customers that you want some feedback on?
- Do you want to gain some tailored customer insight on a subject before planning your next project?



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