



COVID-19 Impact

*A WaterTalk research report
prepared for United Utilities*

April 2020

Background, approach and summary



Research background and approach

United Utilities wanted to understand how water and sewer usage may have been affected by COVID-19 and understand customer concerns and expectations of United Utilities. The research also sought to help United Utilities understand if it is appropriate to communicate water efficiency and water quality messaging at this time, and if so, how customers would like this to be conveyed.

The research sought to answer the following questions:

1. What concerns do customers have at this time?
2. How has COVID-19 impacted customer behaviours and water and sewage usage?
3. What do customers expect from United Utilities during COVID-19?
4. How can United Utilities communicate water efficiency, water quality and what not to flush messaging during this time?

What we did:

Stage 1



10-minute online survey with 1,390 WaterTalk members



Fieldwork ran between 8th – 15th April 2020



Data resulted from natural fall out from the WaterTalk panel

Stage 2



A Group Talk among 189 WaterTalk members



Fieldwork ran between 27th – 29th April 2020

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

Summary



The economy is people's principal worry during these unprecedented times

Customers aren't too worried about their ability to pay household bills just now, but a minority do expect it to become more difficult in the coming months.

Water efficiency is seen as just as important as it was before the outbreak, suggesting customers are looking to keep costs down. Furthermore, three in five are open to receiving water-saving tips from UU which could help to allay concerns around bills.



Disposal behaviour remains largely unchanged, but reminders needed

While the majority of customers report similar disposal behaviour during and before COVID-19, nearly 40% report disposing of cleaning / disinfectant wipes, dental floss, and cooking fats / oils on a monthly basis.

UU can provide reminders of how such items can damage plumbing, but less than half are open to receiving such info at this time. As such, messaging could be linked to saving water (and therefore money) via less flushing.



Customers respect brands that keep the wellbeing of workers and customers top-of-mind

Customers recognise brands (especially essential businesses) who are operating ethically and meeting customer demands while keeping customers and workers safe.

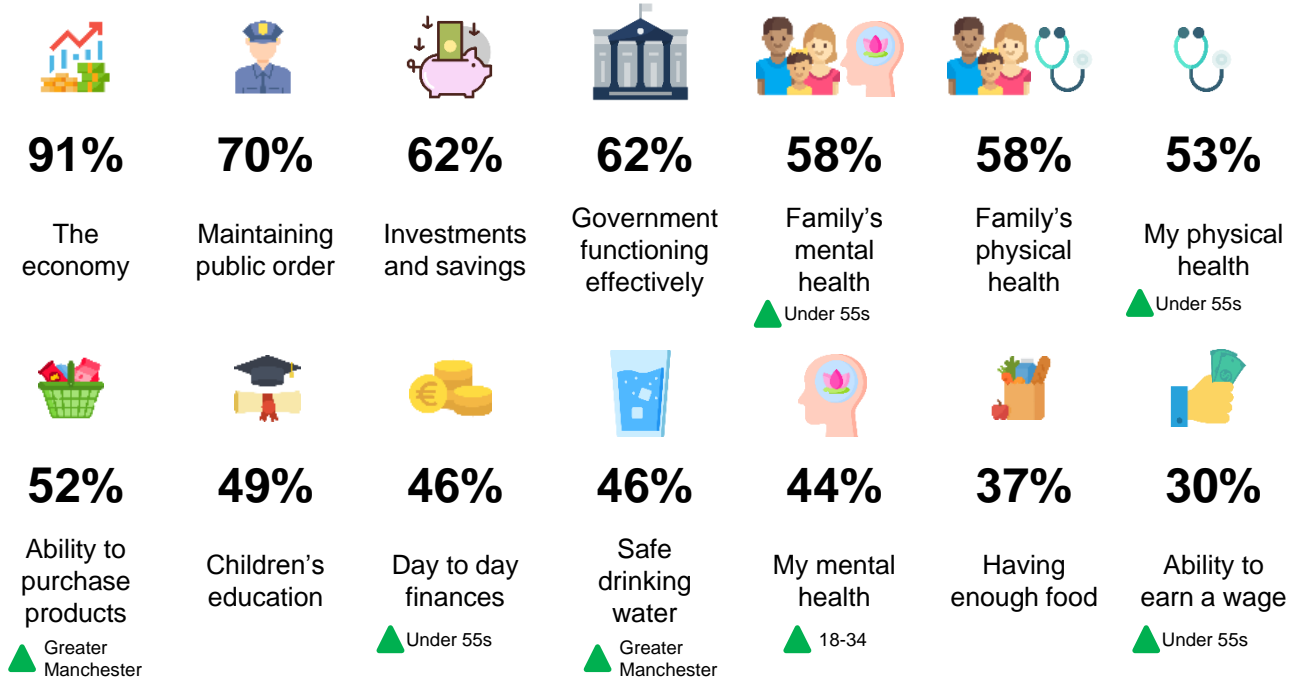
UU's comms on water-saving tips and water quality would typically be welcomed by customers. However, to minimise customer backlash it will be crucial that the framing and tone of any comms doesn't contradict public health advice on the increased importance of handwashing.

Customer concerns during COVID-19



The economy is by far the chief concern, followed by the need to maintain public order in society

COVID-19 concerns



Average number of concerns = **7.6**

▲ 18-34s (8.9), those living with children (8.7), and women (8.2)

▲ Women are significantly more concerned than men about finances, availability of goods, health, public order and educational concerns.

Q1 We will ask you to indicate this by clicking on the 'concerned' or 'not concerned' buttons for each statement.

Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

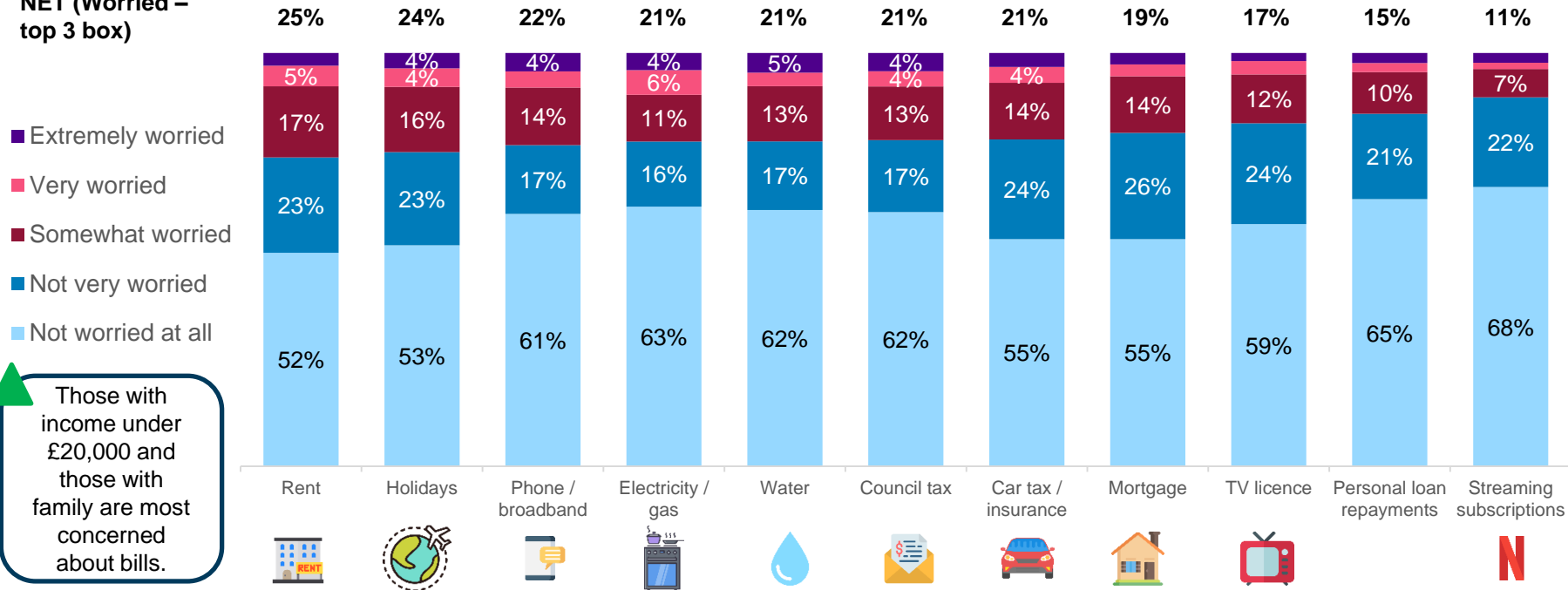
▲ ▼ Triangle: Significant difference at 95% conf. level.

At present, the majority of customers aren't concerned about their ability to pay household bills

Women, unmetered customers, under 55s, renters, <£20k income

Concern about paying bills / costs

NET (Worried – top 3 box)



Q4. Which, if any, bills or costs are you worried about paying?
 Bases vary based on those who pay each bill – excluding 'not applicable'
 Source: COVID-19 Impact survey (April 2020)

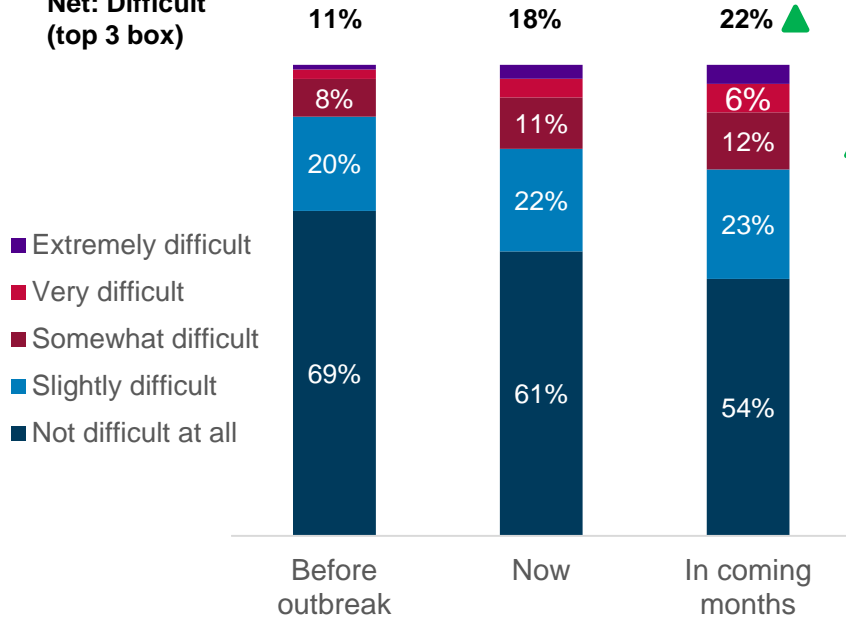
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However, it's expected that paying bills will become more difficult in the coming months; the water bill is of less concern though



Difficulty with meeting monthly bill payments

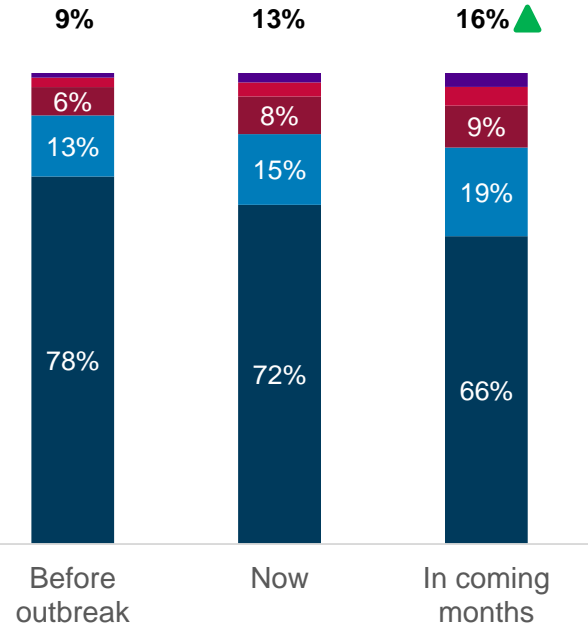
**Net: Difficult
(top 3 box)**



Women and those with families are significantly more likely to expect to find it difficult to pay upcoming bills



Difficulty with meeting water bill



Q5. How difficult would you say it is for your household to meet the monthly payments on your bills?

Q6. And, specifically, how difficult would you say it is for your household to pay your water bill?

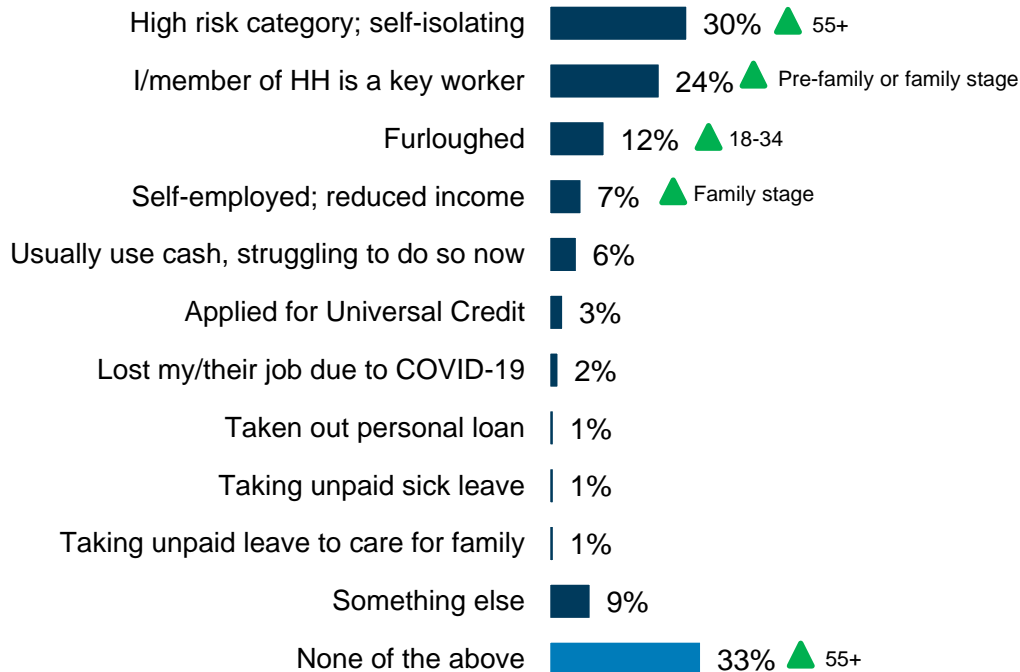
Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

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

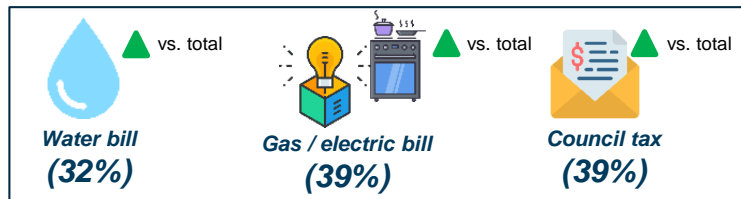
Three in ten are high risk and self-isolating, while a quarter are/have family that are key workers

Current HH situation

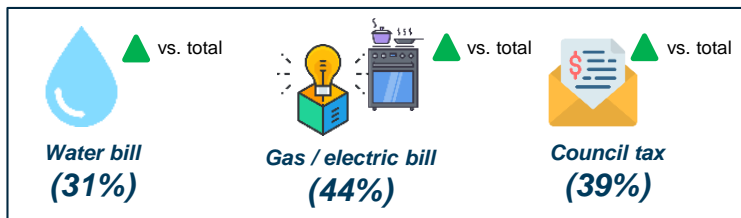


The changes in household situations are already having an impact on the reported worries of those affected

Reported worry for paying bills (those on Furlough)



Reported worry for paying bills (self-employed; reduced income)



Q2. Related to the coronavirus outbreak, which, if any, of the following apply to you personally or someone in your household?

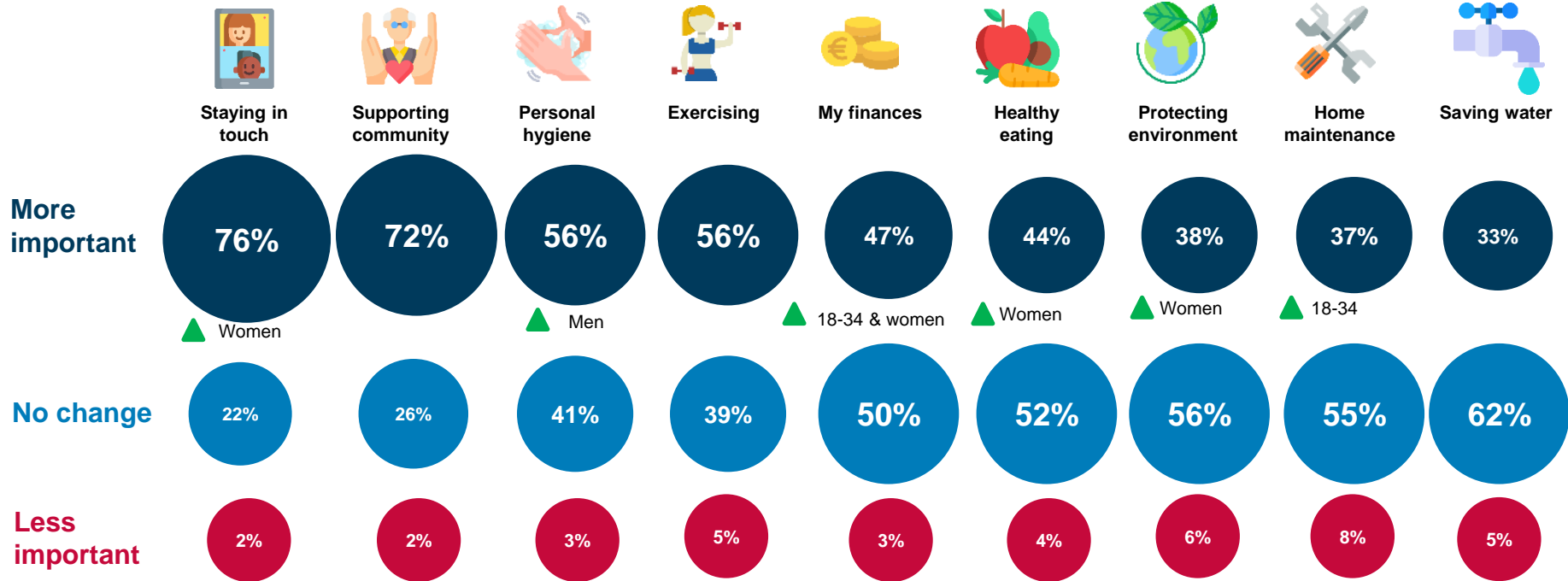
Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

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

Social interactions and community support are key right now. One in three think saving water is more important now

Importance of aspects during outbreak



Q3. In light of the recent changes regarding coronavirus, would you say the following aspects have become any more or less important to you?

Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

  Triangle: Significant difference at 95% conf. level.

Impact on water usage and flushing behaviour



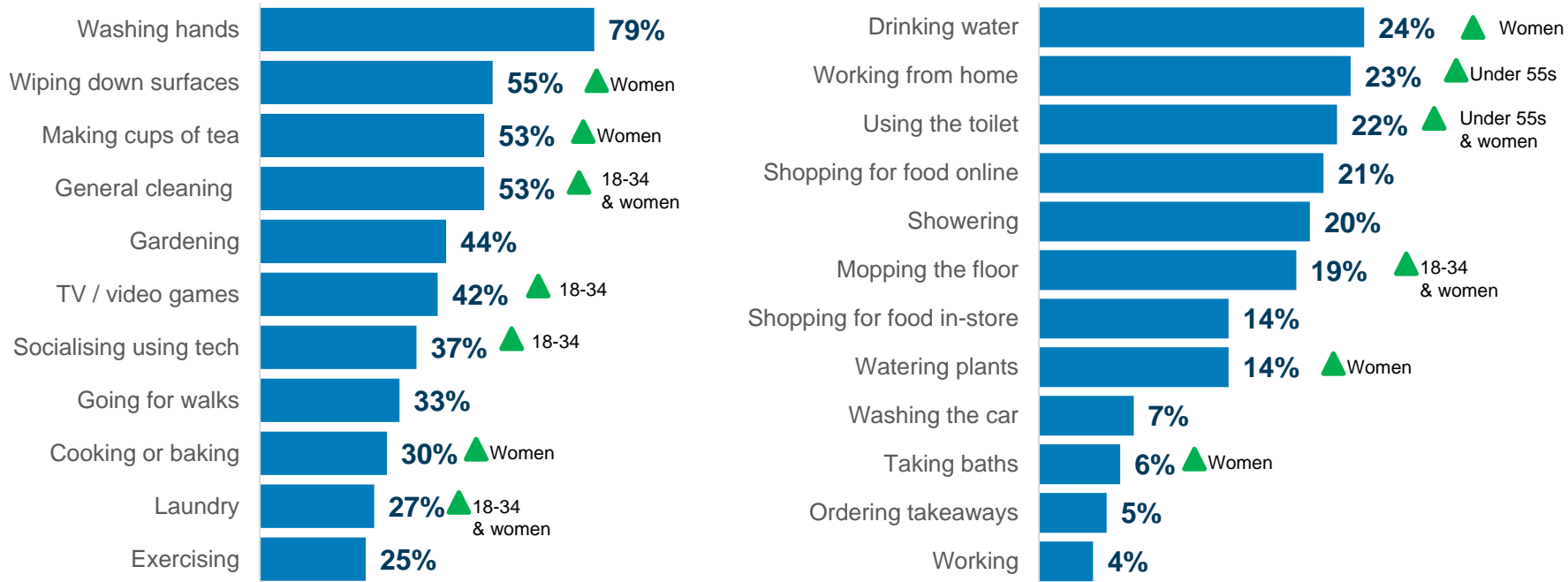
Most are spending more time doing water-related activities (mainly cleaning & personal hygiene), particularly women

Increased activities during outbreak ([top 11](#))

Water related activities:

88%  Women


Increased activities during outbreak ([bottom 10](#))



Q9. Which of the following are you spending more time doing or doing more often (than before the coronavirus outbreak)?

Base: All respondents (n= 1390)

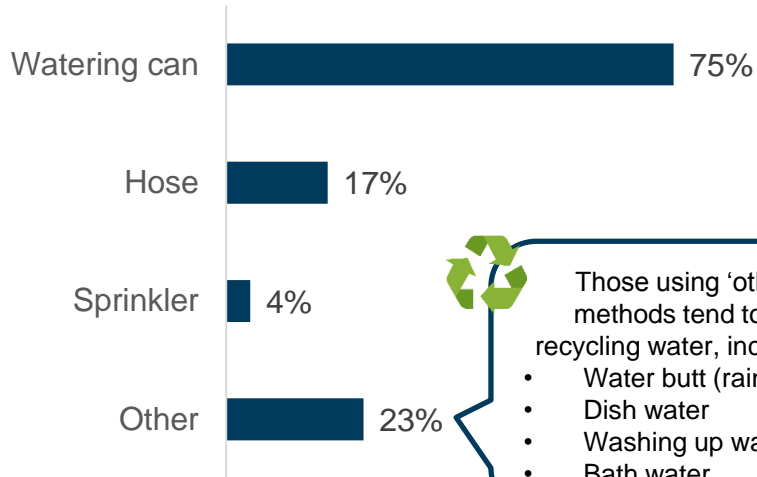
Source: COVID-19 Impact survey (April 2020)

  Triangle: Significant difference at 95% conf. level.

Those watering plants more often tend to do so with a watering can; buckets of water and hoses are top picks for those washing cars more



Methods used to water plants

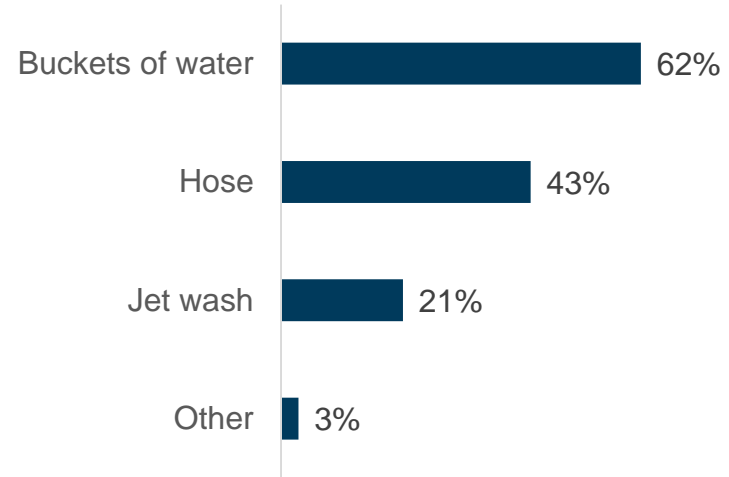


Those using 'other' methods tend to be recycling water, including:

- Water butt (rainwater)
- Dish water
- Washing up water
- Bath water



Methods used to wash car



Q10. You said you have been spending more time watering your plants or doing so more often than before – have you been using...

Base: Those who water plants more often than before (n=190)

Q11. You said you have been spending more time washing the car or doing so more often than before – have you been using...

Base: Those who wash their car more often than before (n= 102)

Source: COVID-19 Impact survey (April 2020)

Three in five admit to disposing of at least one item down the loo or the sink / drain at some point

Items ever disposed of in toilet / sink



60%

have ever disposed of something down the toilet or sink / drain

▲ Women, under 55s, private renters, living with kids



Hygiene /
personal care

51%



Cleaning
products

24%



Kitchen
products

23%



Pet-related
items

19%

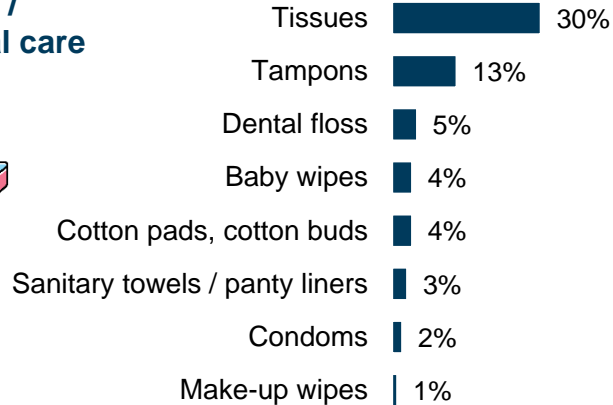


This suggests that additional comms may be required to remind customers of how best to dispose of these items. However, less than half (44%) would be interested in receiving this info right now, so messaging could be framed as an opportunity to save water (and money) by only flushing the Three Ps.

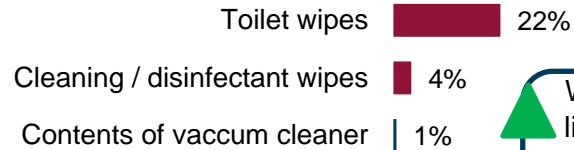
Paper sanitation products are the most commonly disposed of, followed by hair and food products

Items ever disposed of in toilet / sink

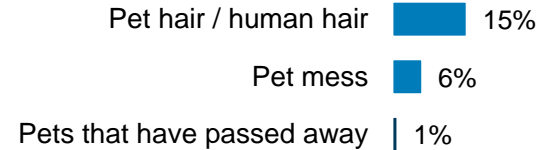
Hygiene / Personal care



Cleaning

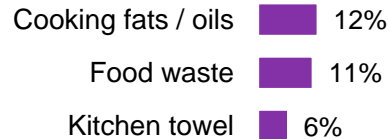


Pet

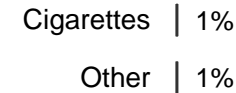


Women are more likely than men to have disposed of tissue, toilet wipes, hair, or pet mess.

Kitchen



Other



Q12. Which of the following items do you/have you or anyone in your household ever flushed down your toilet or put down the sink/drains?

Base: All respondents (n= 1390)

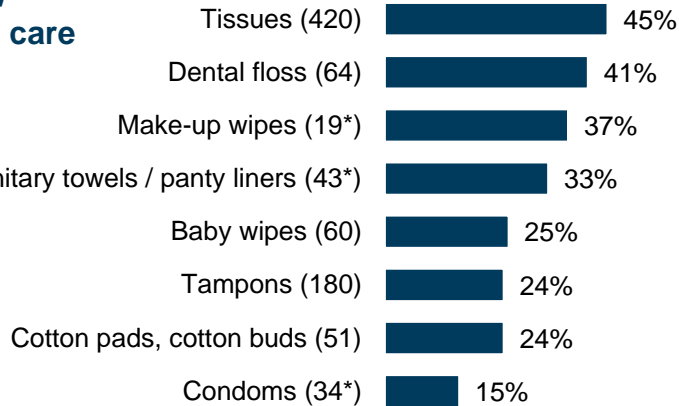
Source: COVID-19 Impact survey (April 2020)

  Triangle: Significant difference at 95% conf. level.

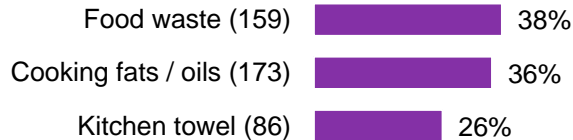
At least a quarter of those who have disposed of each item do so on a monthly basis, with the exception of condoms

Items disposed of in toilet / sink at least once a month

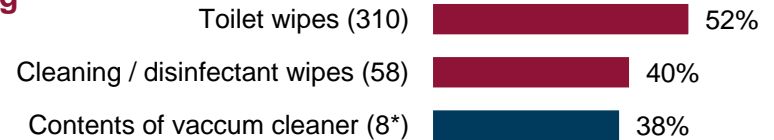
Hygiene / Personal care



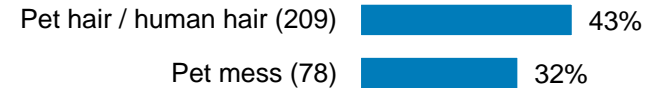
Kitchen



Cleaning



Pet



Other




*Indicates items with base sizes under n=50.
Results to be viewed directionally.

Q13. When disposing of the item(s) you mentioned, how frequently do you put them down the toilet or the sink/drains?

Base: Those that have ever disposed of each item down the drain (n= bases vary by item)

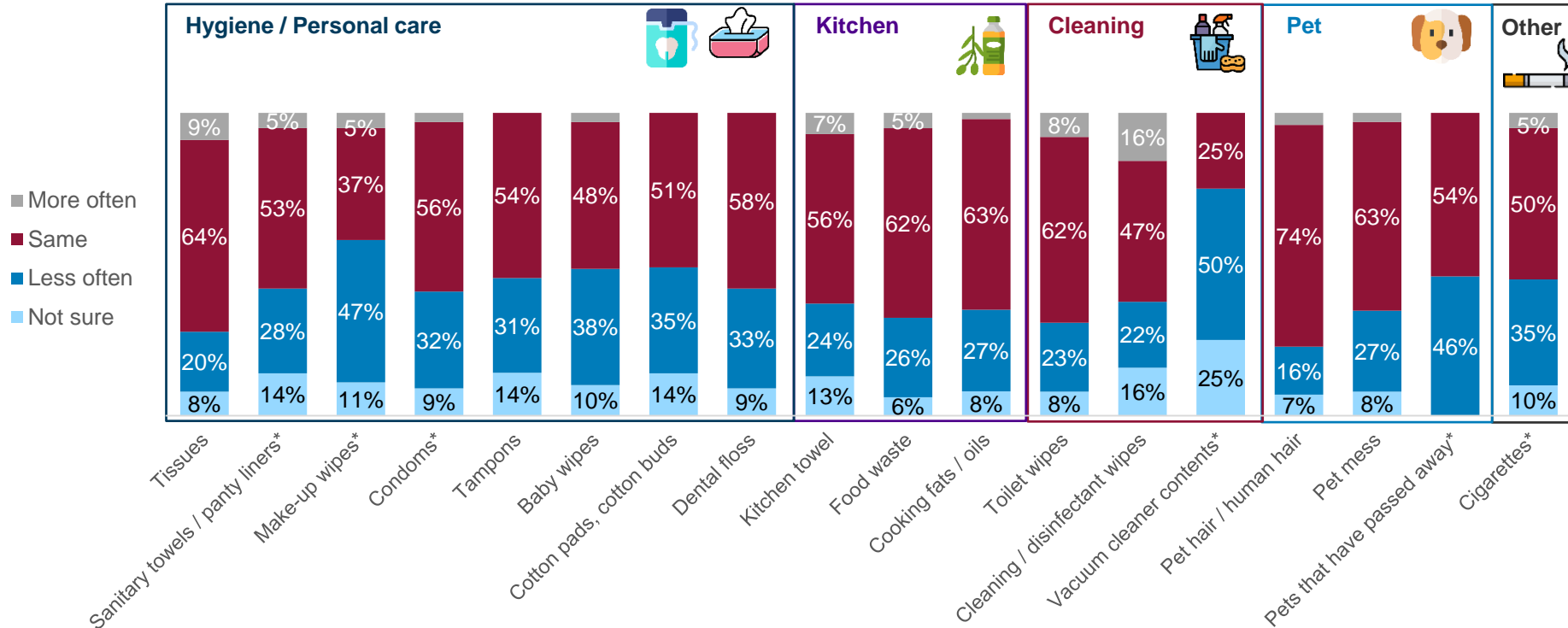
Source: COVID-19 Impact survey (April 2020)

  Triangle: Significant difference at 95% conf. level.

Disposal of items is largely unchanged during lockdown, but a minority are disposing of tissues and wipes more often than previously

Change in frequency of disposing of items during outbreak

! *Indicates items with base sizes under n=50. Results to be viewed directionally.



Q14. Would you say this is more often, less often or the same frequency as before the coronavirus outbreak?

Base: Those that have ever disposed of each item down the drain (n= bases vary by item)

Source: COVID-19 Impact survey (April 2020) *make-up wipes (n=19) sanitary towels (n=43), condoms (n=34), cigarettes (n=20)

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

Perception of brands and their response to COVID-19



Over half feel brands should be communicating as normal and letting customers know about sales and discounts

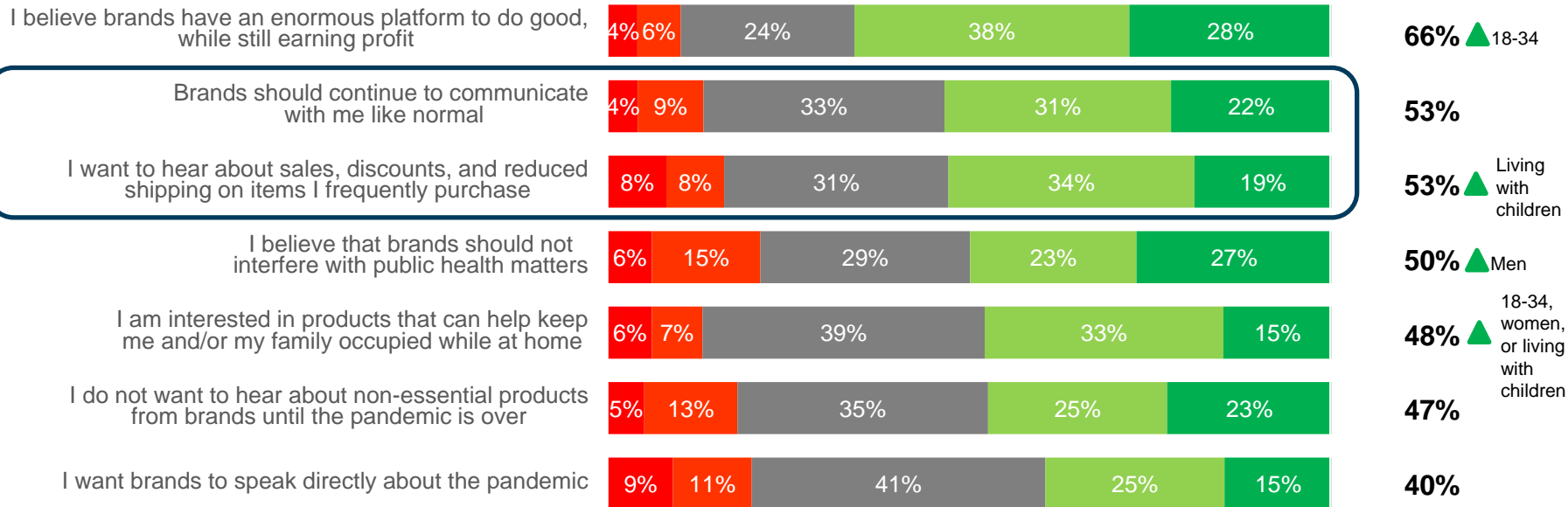
Appropriate information from brands (in general)



The majority of consumers expect or are neutral about brands promoting their products as well as providing extra content, like entertainment, during this time. This suggests that some additional brand communication is acceptable.

■ Strongly disagree ■ Slightly disagree ■ Neither agree nor disagree ■ Slightly agree ■ Strongly agree

Net: Agree



Q15. Let us know the type of information that you think is appropriate from brands?

Base: All respondents (n= 1390)

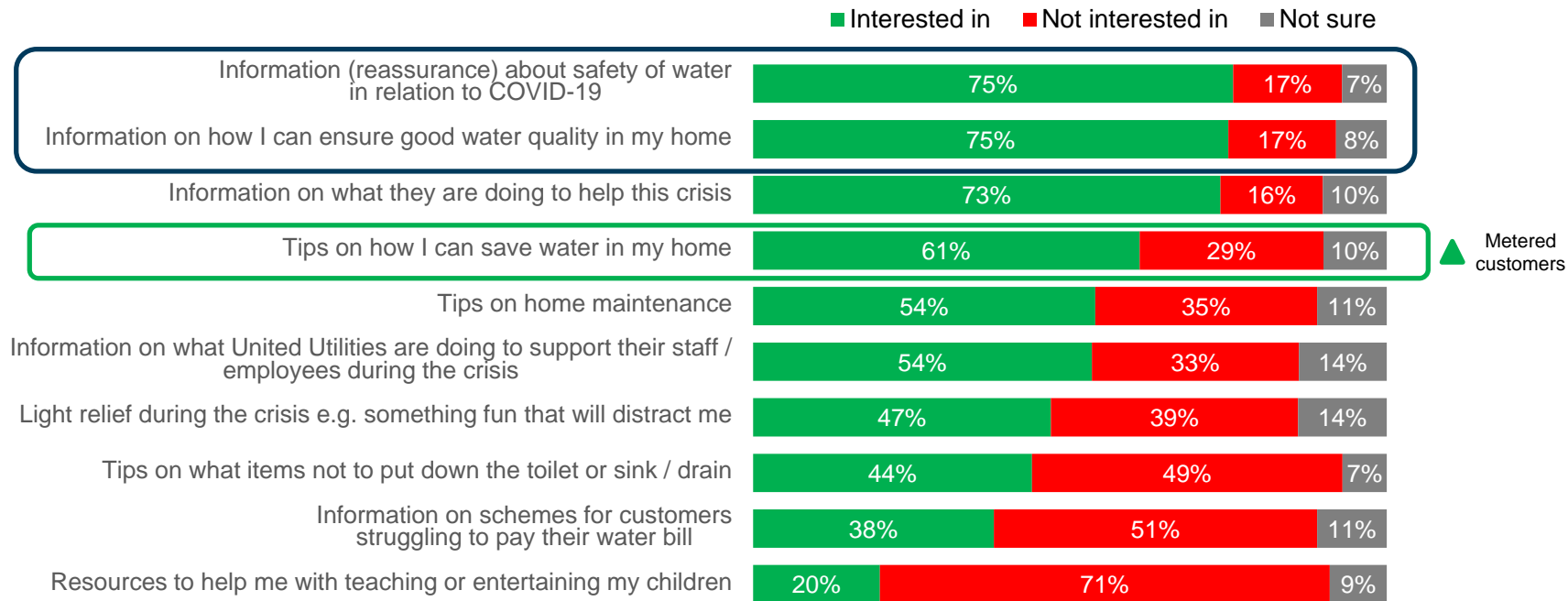
Source: COVID-19 Impact survey (April 2020)

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



Customers are most interested in water safety / quality during this time; a majority are also interested in tips for saving water at home

Interest in communication from UU specifically



Q20. Which of the following types of communications would you be open to receiving from United Utilities during this time?

Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

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

Sensitivity to “rules” is increased just now; customers seek helpful information rather than implied instructions to monitor water usage

Tone and channel of UU communication



Tone of communication should be informative and helpful. Customers do not want brands to tell them what to do during this time of increased government regulation.

“The language of the COVID-19 epidemic is really all about what you can't or shouldn't do – and that is for good reasons – but there is a limit to the extent that people will respond to that and behave in the desired manner.”

Channel of communication is dependent on the urgency of the message and which audiences are being targeted. Customers do not wish to be inundated with updates from brands under normal circumstances – and this preference holds true during current times.

“I think they [communications] need to be visible but non-intrusive. So they can be sent via email, or perhaps as a strapline on customer bills or on the outside of envelopes (for customers who are still receiving paper bills).”



- **Email / email newsletters / social media** are best used for on-going or everyday updates as they can reach a large portion of customers while providing customers the flexibility to opt-out of the communications they don't want to receive.



- **Text messages / paper letters** should be reserved for more urgent matters (new aid schemes, quality control issues, etc.) so that both younger and older customers are aware



- **TV** has a large reach and news programmes such as Good Morning Britain can be used to deliver urgent messages to the public

UU should reassure customers of continued service and quality; highlight the role and appreciation of UU essential workers

Messages customers request from UU

Reassurance about service and water quality

In uneasy times, customers want encouraging messages that their water service and quality remains uninterrupted – especially as this is an essential.

“People need to know that their water supply is safe and reliable and that UU are operating normally during the COVID pandemic.”



Water for the North West

Cast a spotlight on UU essential workers

Customers respect essential workers and have negative perceptions of brands that aren't prioritising employees during this time. Sharing stories of UU workers in the field puts quality service, new safety measures and honouring workers front and centre.

“If you can find some good news stories, that would be a change from the gloom and doom. Maybe a UU employee has gone out of their way to help a customer, or is volunteering somewhere to help the vulnerable.”

Business as usual

Customers welcome normal business updates (fixed water leaks in the areas, impact of weather changes on water, etc.) along with new aid schemes.

“There is plenty on the website about having a shower instead of a bath etc. It should be about help with paying water rates. Also telling us the time it's taking you to fix reported leaks.”

If messages requesting behaviour change

(i.e. what not to flush) are to be communicated during this time, customers are likely to be more receptive to the request if it is connected to reducing UU employees' workloads.

“It might be an opportune moment to remind the user to use the services responsibly and thereby perhaps contribute to reducing the need for workers to unblock drains.”

Customers offered several *water-saving tips* they felt would be useful to communicate more widely

Customers' suggested water-saving tips for UU to communicate

• **Recycling water** to be used for multiple purposes

"Thank customers for using GREY WATER (from washing up bowls) in their gardens. Whilst waiting for the hot water to come through, it can fill a whole washing up bowl, input this in a bigger container near my fence and I use a plastic jug to them water my tubs, it's working very well."

"Use water used to rinse dishes to water garden."

"Vegetable washing water can be re-used in the garden."

"Save your bath water for plant watering."

• **Encourage use of water saving devices** to lower bills

"Because now people need to use more water for washing hands and goods, the water efficiency of the kitchen will be important. People need to be notified that their water consumption might grow and need to be advised to fit water saving tap stubs in kitchens."

"Use the short flush wherever possible."

"Claim free water saving gadgets."

• **Turn the tap off** while washing hands or brushing teeth

"We all need to take care, wash your hands thoroughly but don't leave the tap running."

"Remind about the importance of handwashing, but add a gentle reminder that this doesn't mean to leave the tap running."

"Keep washing your hands regularly remembering to turn off the tap."

"Not keeping the tap on while actually brushing your teeth, turn it back on when ready to rinse."

Customers are looking for reassurance that *water quality* is being consistently checked and maintained

Customers' suggested water quality messaging for UU to communicate

Comms around water quality should be **focused on what UU is doing** to ensure this rather than what customers can do themselves

“That UU are doing the very best to maintain the quality of the water supply, and despite the continuing problems with Covid-19 have made plans to preserve and protect the water treatment.”

“Please do not worry about the quality of the water during this Pandemic. United Utilities will be doing their utmost to maintain our clean drinking water.”

“I would like UU to reassure all their customers how the water is treated to ensure it is free from Covid-19 or indeed any other virus..”

“I would like to hear that I cannot get Covid-19 through water supply.”

“Not heard anything about water quality from United Utilities, some adverts on TV showing someone testing water would be so easy, there are no answers as to how this virus is being spread but who is monitoring the water for these viruses. No doubt you may be, but are you telling people this ?I can answer this myself No.”

“I have enough going on without having more emails from you guys. Maybe one reassuring people of water treatment and where help is available for advice on lowering water consumption etc but make it one simple email with loads of articles on your website.”

Messaging on *what not to flush* should continue to focus on the 3 Ps

Customers' suggested what not to flush messages for UU to communicate

The need to remind customers to **avoid flushing cleaning wipes** appears to be particularly key

"Only toilet paper down the toilet."

"There has been a marked increase in the use of antiseptic wipes and the disposal of which may be suspect."

"It's very important that people know what they can't flush down the lavatory or pour down the sink, especially if there are young children in the household. Perhaps you could have a campaign directed at children specifically."

"Not flushing the wipes away."

"Only putting loo paper down the toilet."

"Keep calm, carry on and don't flush wipes down the loo."

"Use terminology to explain why flushing anything except toilet paper is so damaging (maybe some colourful illustrations!)"

"Reinforce the message to safe water and be careful with what you flush down the loo."

"Don't use kitchen roll instead of loo roll."

"I've done it a few times and put the wrong stuff down the toilet but I've realised my mistake before flushing. There appears to have been no advertising by United Utilities to inform people, of what can and can't be flushed down the toilet and information about the consequences of putting the wrong things down the toilet. Which I find quite surprising!"

Customers want communication that is on-brand, but it should take into account public health advice

Messages to avoid



Many perceive water conservation tips as untimely during the COVID-19 crisis

Increased water usage is felt to be unavoidable when cleaning and handwashing is of increased importance. Suggesting that water be conserved during this unique time can be a pain point for some customers and may be perceived as unreasonable and contrary to current health advice.



"I've been isolated since 7th April. I know I'm using more water, coffee, clothes washing more frequently, hand washing more frequently under running water, on a water meter, so [I'm] conscious of the extra use but it's unavoidable!"

Additional subjects to be mindful of:

- **Customers are looking for information rather than entertainment** (games, competition, etc.) from UU.
- **Family or community-related content** is typically perceived as **off-brand and unusual coming from a utilities company**, but was mentioned by a few customers.



"Focus on the usual information you give with a bit of assurance on safety news."



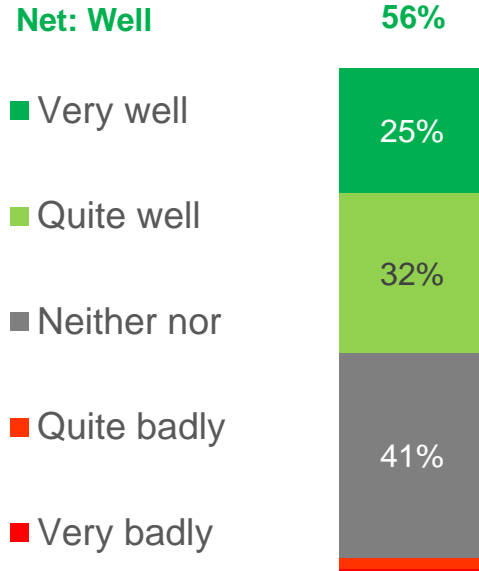
"A family targeted game or competition to discover the most unusual way of saving water, something that will engage the interest of your customers and help United utilities get their messages across."



Customers are generally open to receiving water-saving tips but because handwashing and hygiene are of increased importance just now, comms shouldn't contradict or dial down public health advice. It's crucial to get the tone right to minimise potential backlash from customers.

Most feel UU's response has been good so far; however salience for comms may be low with close to 1 in 3 indicating a lack of awareness

Perceptions of UU's response to the outbreak (DK excluded)



However, it's important to note that 31% of customers indicated that they "*don't know*" how well UU have responded to the crisis, suggesting that many customers haven't seen any comms or had reason to interact with UU during this time.

Q18. How well do you think United Utilities are doing in their response so far to the coronavirus?

Q19. Why do you think that United Utilities are doing...?

Base: All respondents, excluding those that said "don't know" (n= 957)

Source: COVID-19 Impact survey (April 2020)

Communications have been particularly good at keeping customers informed about maintaining service standards

Perceptions of UU's response to the outbreak

NET: Well



Customers are particularly positive about the quality of service and consistent flow of information available

Maintaining quality of service through this difficult time.



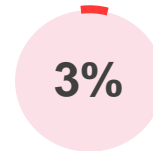
They are making sure we still get water through this pandemic, and UU have high standards with the water we receive. Thank you for keeping our water flowing.

Keeping the public informed on how UU's procedures and billing has adapted to keep everyone safe.



[I've] seen pics on social media about workers keeping safe distance and links to say we [UU] will continue to provide a service for clean water.

Net: Badly



Whilst only a very small proportion of customers disapproved of UU's response; lack of comms detailing payment assistance was an issue for some

Disapproval of UU's response is **driven by those who have not received communication** during this time, specifically regarding **reduced bills / payment assistance**.



Not offering any discount or relief on bill. Especially now we are having to wash our hands more, so having to use more water. Especially for people on benefits and people on low pay.



Mentions relating to lack of support for those struggling to pay their bills suggest that the proposed extension of the 'Back on Track' tariff would be welcomed.

Q18. How well do you think United Utilities are doing in their response so far to the coronavirus?

Q19. Why do you think that United Utilities are doing...?

Base: All respondents, excluding those that said "don't know" (n= 957)

Source: COVID-19 Impact survey (April 2020)

However, additional efforts and communication around reducing bills and keeping UU workers safe in the field would be appreciated

Additional action requested of UU

Continuing to keep water service operating

“ No. Brilliant job as always. We are so lucky being able to turn on the tap and **have clean and safe water.** ”

“ To continue to maintain a professional service and attend emergencies as they did prior to the Pandemic. **Continuity is reassuring for most people at this time.** ”

Reducing bills, starting with the vulnerable, key workers, and low income customers

“ Supporting those in **financial need and aiding the vulnerable** ”

“ Offer **payment holidays or reduced payment** during current situation. ”

Highlighting the work of employees and keeping them safe

“ Continue to **support workforce and correct PPE** – highlighting that **staff are key workers so they can be celebrated** after all we all need water and we all go to the toilet – someone’s got to deal with the waste of all the toilet rolls that were bought! ”

“ Yes, keep your **employees safe.** ”

There is respect for essential brands adapting to meet new demands, and for non-essential brands helping while complying with rules

Brands doing a **good job** in outbreak response

TESCO



All **supermarkets**, who are adapting operations to keep up with the demand for essentials while protecting workers and the public

dyson



Non-essential businesses that are **changing their production lines** or **readily complying with regulations** to close brick-and-mortar stores.

“ *Aldi, because they're **rewarding their workers for their hard work and extra risk**. All supermarkets because they're doing everything they can to safeguard the health of their customers while maintaining supplies.*

“ *T K Maxx – they **donated all food items to food banks**, closed stores and online shopping so **staff aren't at risk***

“ *Tesco – TV adverts **explaining their social distancing methods** and how customers should comply.*

“ *Formula 1, Dyson, Givenchy – any brand that has tried to alter their manufacturing or service to **provide a public service**.*



*...So it is the Post Office and in general banking and some of the utilities providers (like UU, but NOT the Energy providers!) who are **helping people in these difficult time**. Odeon Cinema was very kind holding off all payments for Unlimited Cards.*

Q16. Which brands would you say are doing a good job in their response to the coronavirus outbreak, and why?

Q17. And which brands would you say aren't doing a good job in their response to the coronavirus outbreak, and why?

Base: All respondents (n= x)

Source: COVID-19 Impact survey (April 2020)

Conversely, certain ‘villains’ were identified for focusing on profits more than customers and/or staff

Brands that are not doing good job in outbreak response



**SPORTS
DIRECT.com**

JD Wetherspoons and **Sports Direct** who initially refused to lock down their stores after the directive for non-essential business to close. These companies are also turning a profit while not looking after workers.

“

Wetherspoons furloughing staff having made large profit.

“

Sports Direct. First they remained open, claiming they were 'essential', then there was a public backlash, so they reluctantly closed. Now they continue trading online with prices increased to profit on the outbreak, knowing that more people will be exercising.



Airlines and recreational companies that are making customer refunds difficult and misallocating profits

“

Virgin Airlines who have been very slow to offer refunds to people who cannot travel because of restrictions. Offering only the chance to book at a later date.

“

Airlines with hefty dividends paid to shareholders yet taking bailout money. Football clubs like LFC and Tottenham furloughing staff despite millions/billions in the bank.

Q16. Which brands would you say are doing a good job in their response to the coronavirus outbreak, and why?

Q17. And which brands would you say aren't doing a good job in their response to the coronavirus outbreak, and why?

Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

A quarter are aware of schemes to help those struggling financially, but many are unaware of the details

Awareness of United Utilities schemes

25%

Are aware of UU schemes for those struggling to pay their water bills



Those aware of schemes are familiar with UU's offer to aid those struggling to pay their bill

“

Low income support. Debt repayment plans/payment rescheduling for people facing financial hardship.

However, for most, recall on scheme details is low, with many knowing they can just contact UU if clarity is needed

“

I am aware that schemes are available on the web page. I have not researched as not applicable at this time.



While those not currently facing financial hardship are less likely to recall scheme details, it's important to remind customers of available programs as self-isolation continues and the country's situation develops.

Q7. United Utilities has some schemes available for customers who are struggling to pay their water bills. [Are you aware of any of these?](#)

Base: All respondents (n= 1390)

Q8. What schemes are you aware of for customers struggling to pay their water bills?

Base: Those aware of schemes (n= 346)

Source: COVID-19 Impact survey (April 2020)

Appendix



Quant survey sample profile

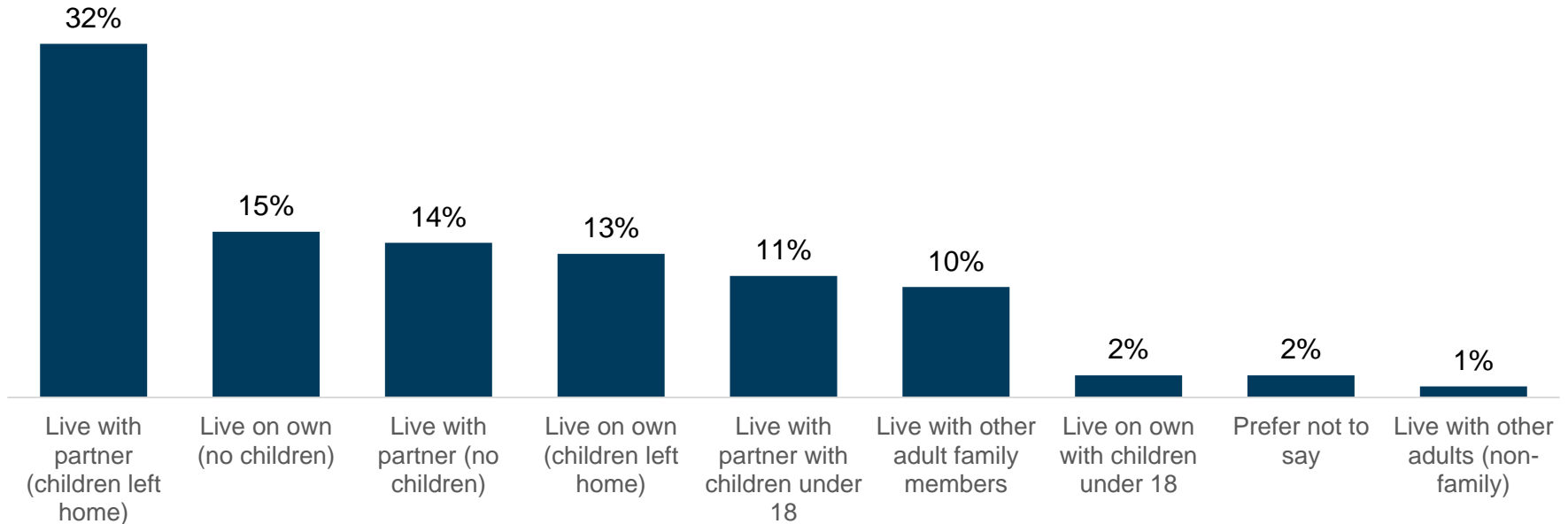
Total	Unweighted	
	Count	%
Gender		
Male	862	62%
Female	517	37%
Unknown	11	0%
Age		
18-34	71	5%
35-54	299	22%
55+	934	67%
Unknown	86	6%
Region		
Cheshire	209	15%
Cumbria	91	7%
Greater Manchester	494	36%
Lancashire	351	25%
Merseyside	227	16%
Unknown	18	1%

Group Talk sample profile

	Count	%
Gender		
Male	119	63%
Female	69	37%
Unknown	1	<1%
Age		
18-34	10	5%
35-54	53	28%
55+	126	67%
Region		
Cheshire	30	16%
Cumbria	15	8%
Greater Manchester	65	34%
Lancashire	37	20%
Merseyside	36	19%
Unknown	1	<1%

Household situation (quant survey)

HH situation



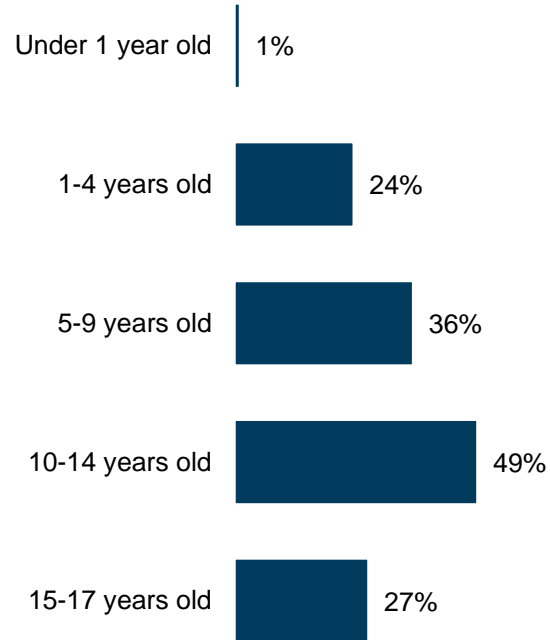
Q22. Please could you confirm which household situation best applies to you?

Base: All respondents (n= 1390)

Source: COVID-19 Impact survey (April 2020)

Age of children under 18 living in house (quant survey)

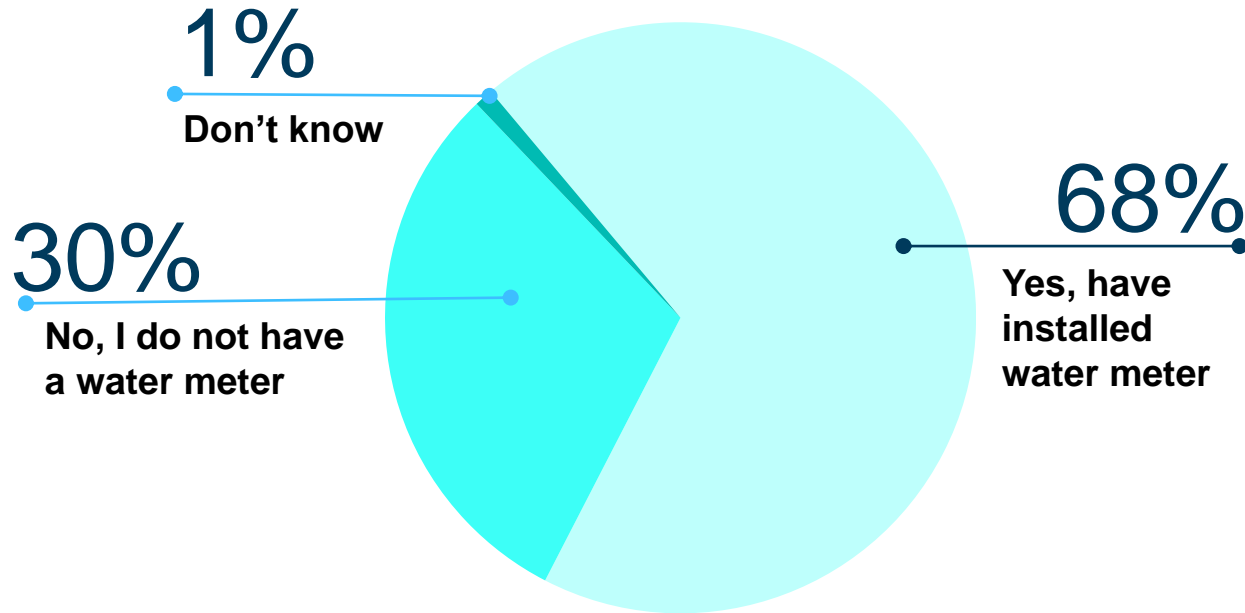
Age of children under 18 living in house



Q23. You said you have children under 18 living at home. In what year were each of your children who are under 18 born?
Base: All respondents (n= 183)
Source: COVID-19 Impact survey (April 2020)

Measured vs unmeasured (quant survey)

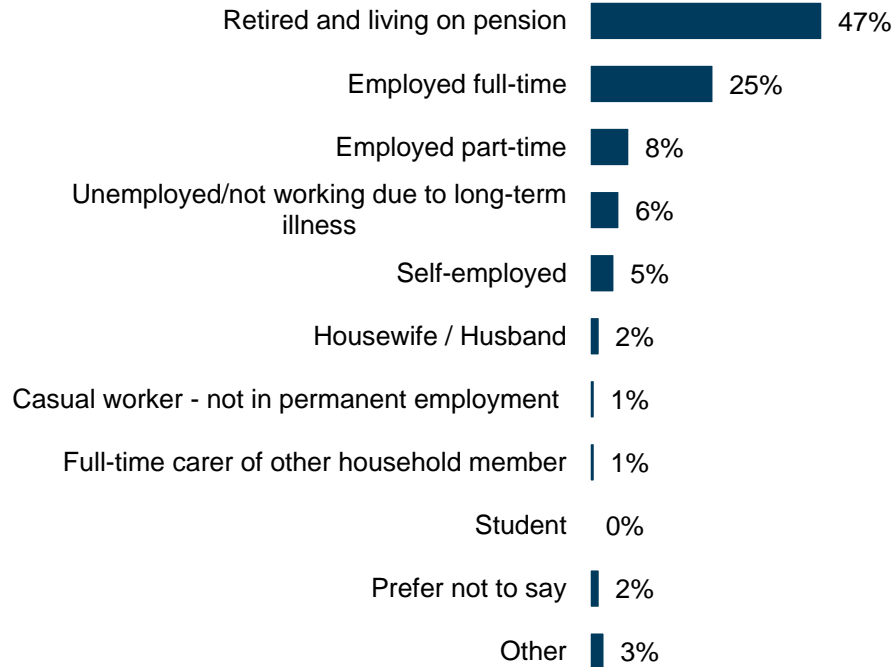
Measured vs unmeasured



Q24. Do you currently have a water meter installed at your home?
Base: All respondents (n=1390)
Source: COVID-19 Impact survey (April 2020)

Employment status (quant survey)

Employment status



Q25. Which of the following applies to you?
 Base: All respondents (n= 1390)
 Source: COVID-19 Impact survey (April 2020)

  **Triangle:** Significant difference at 95% conf. level.