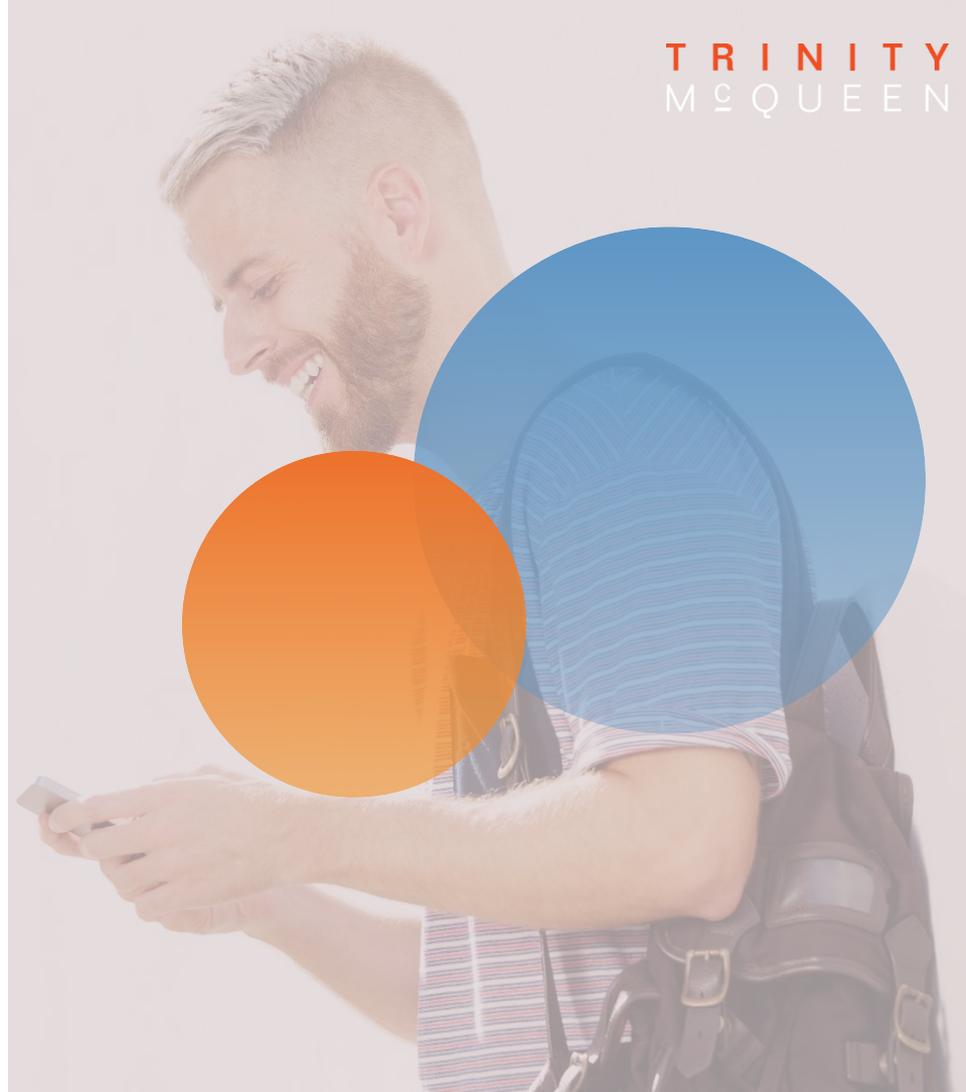


# Q3 Campaign awareness omnibus

NWG  
21/10/21

# Contents

Introduction	3
Demographics	4-5
Brand	6-16
Value of Water	14-15
Key metrics	19-23
Unprompted campaign awareness	26-30
Just Add Water	30-36
Blockages (NE only)	29-32
Leakage	37-41
Waterside parks	42-47
Website	48-51
Priority Service	52-54
The app	55-57
I like mine...	58-60



# Introduction

Aim: To measure awareness of campaign activity amongst customers in NWG's regions and get an understanding of the impact of such activities on behaviour

On-going research programme, previously carried out by means of street interviews, now online (since Qtr2 '20).

Independently sourced sample of respondents in the company's postcode areas.

Screening out any who don't recognise the NW/ESW logo as being their water company.

Fieldwork dates: 24<sup>th</sup> September – 12<sup>th</sup> October 2021

Average interview length: 11 min, 6 seconds

Location	Interviews
North	300
Essex	154
Suffolk	50
TOTAL	504

Covering, this wave:

- The brand, value for money and propensity to recommend
- Recall of Just add water activity
- Usage / disposal of wipes and awareness that flushing wipes can cause blockages (NE only)
- Action in the case of outside leaks
- Usage of NWG's Waterside Parks and website
- Recall of, and views on, the Priority Services campaign
- Usage of NWG's app
- Recall of, and views on, the 'I like mine' campaign



# Demographics

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# Demographics

Quotas were set to broadly match the profile of the population

Sample profile	Total	NW	ESW
Base: all respondents	504	300	204
Male	50%	50%	50%
Female	50%	50%	50%
18-34	18%	21%	13%
35-44	17%	17%	18%
45-54	19%	19%	20%
55-64	18%	17%	19%
65+	27%	26%	30%
AB	32%	29%	35%
C1C2	45%	46%	42%
DE	24%	24%	23%



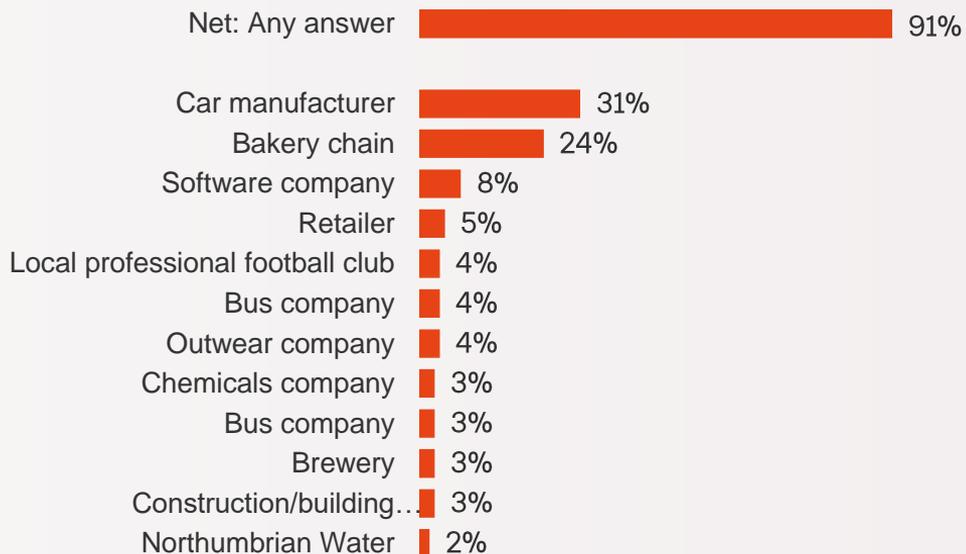
Brand

**NWG**  
*living water*

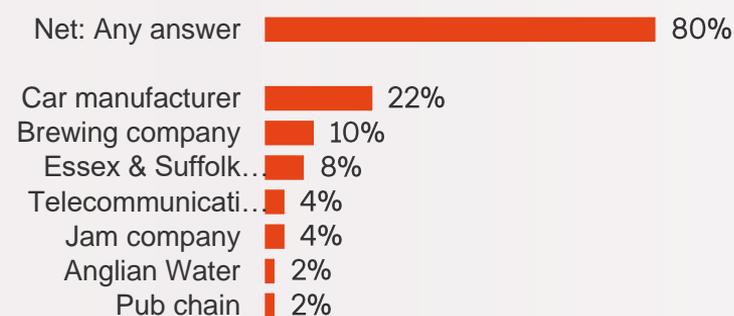
TRINITY  
MCQUEEN

# Companies associated with each area

## North East



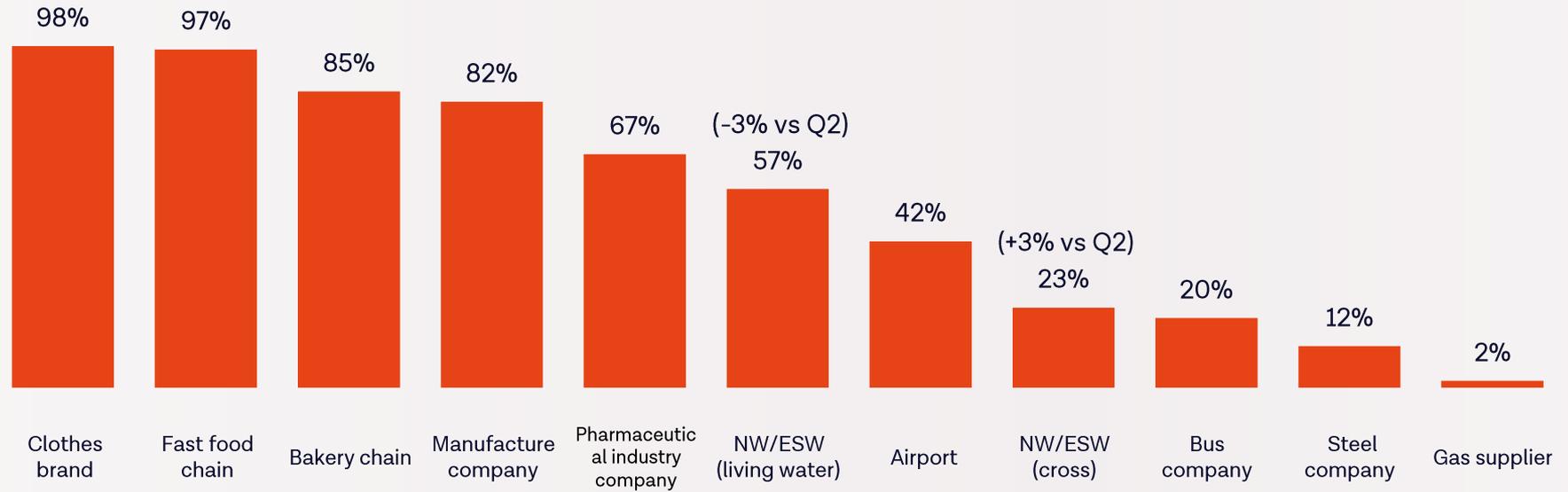
## Essex/Suffolk



Q1. Which companies do you most associate with [the North East / Essex / Suffolk]? [unprompted] Base: All respondents NW Region (300), ESW Region (204)

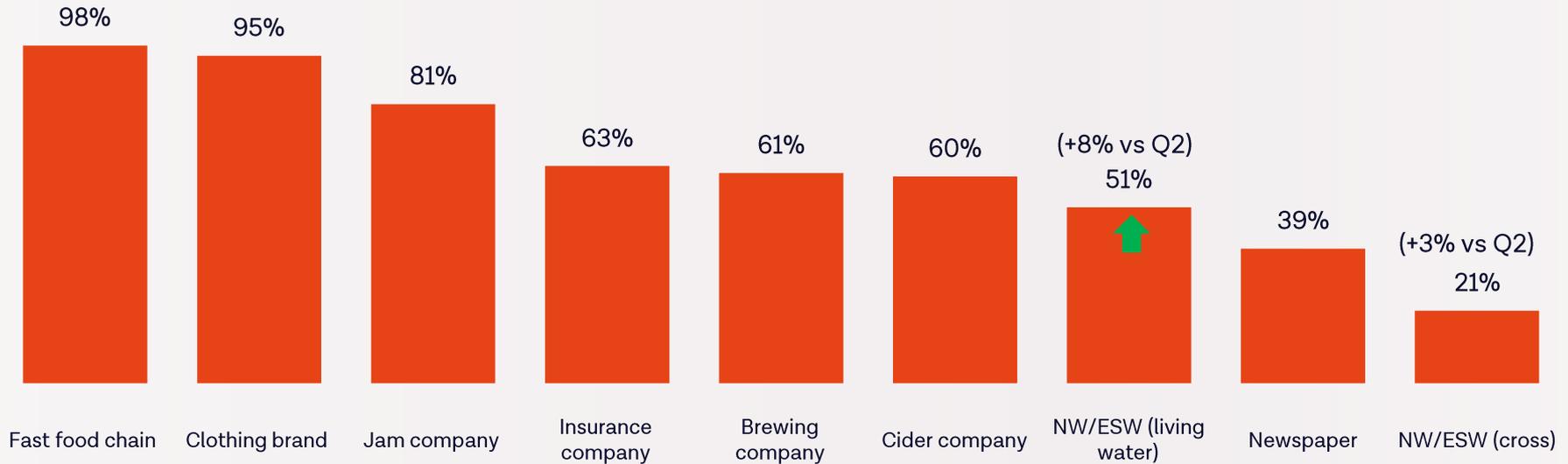
# The Northumbrian Water 'living water' identity is more widely recognised than the 'secondary graphic'

## North East



# Recognition of the Essex & Suffolk Water 'living water' identity has significantly increased from Q2 21

Essex/Suffolk



  Significantly higher/  
lower than Q2 21

# There is still work to do in the North to increase recognition of the new identity

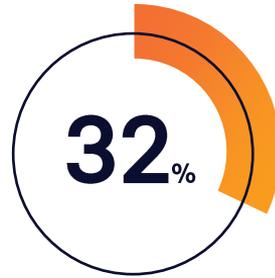


# A third of Northumbrian Water customers knew the correct meaning of NWG

North East

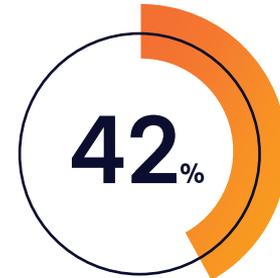


Have seen the NWG logo before



Knew the correct meaning of NWG

28% Didn't know what NWG stood for



Are aware that NW is part of the Northumbrian Water Group

# Half of customers in Essex / Suffolk don't know the correct meaning of NWG

Essex/Suffolk



Have seen the NWG logo before



Knew the correct meaning of NWG

**49%** Didn't know what NWG stood for

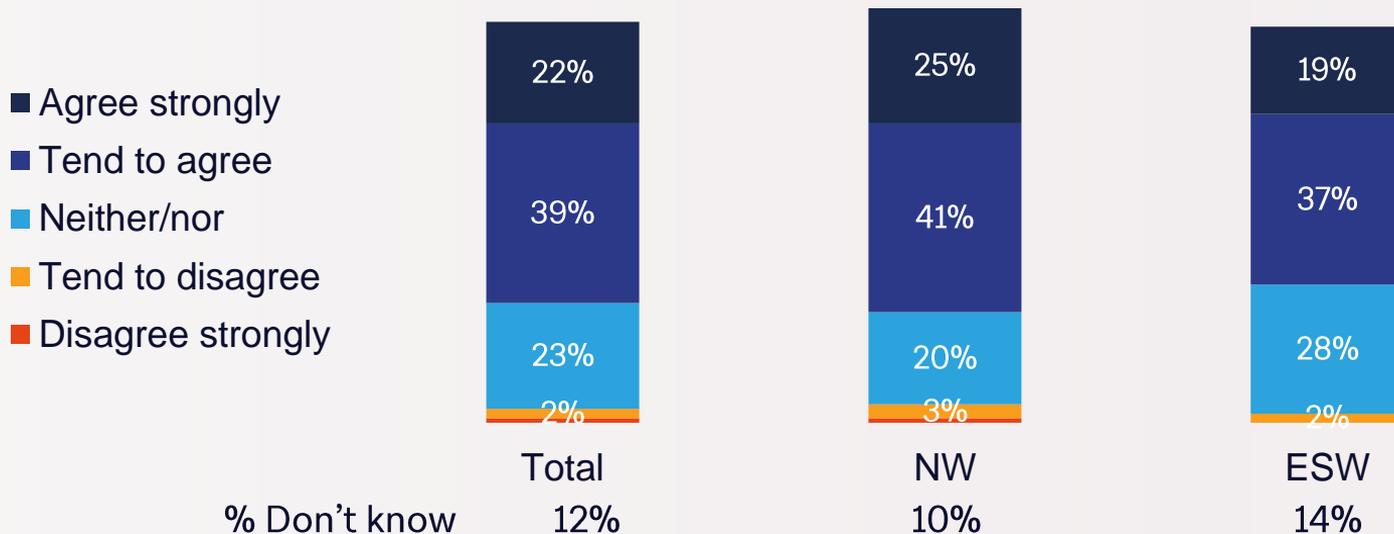


Are aware that ESW is part of the Northumbrian Water Group

# Business values and principles

To what extent do you agree or disagree with the following statement?

Northumbrian Water / Essex & Suffolk Water is a company with good business principles and values

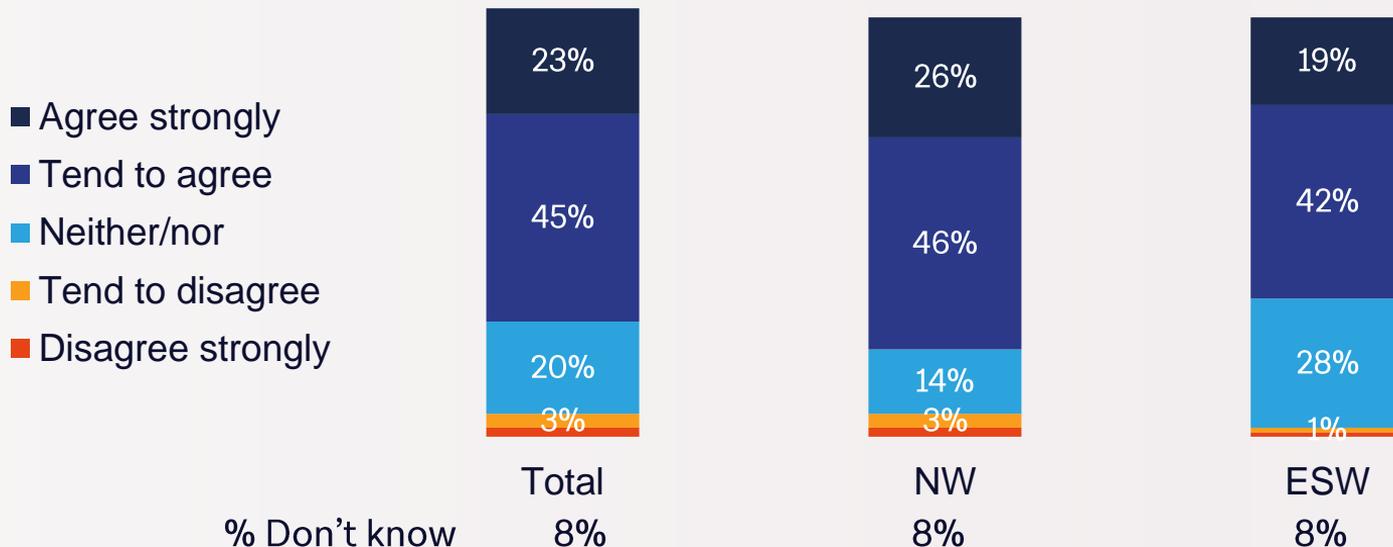


Those aged 18-34 are more likely to agree with this statement

# Business values and principles

To what extent do you agree or disagree with the following statement?

Northumbrian Water / Essex & Suffolk Water ... cares for the essential needs of its communities and environment, now and for generations to come

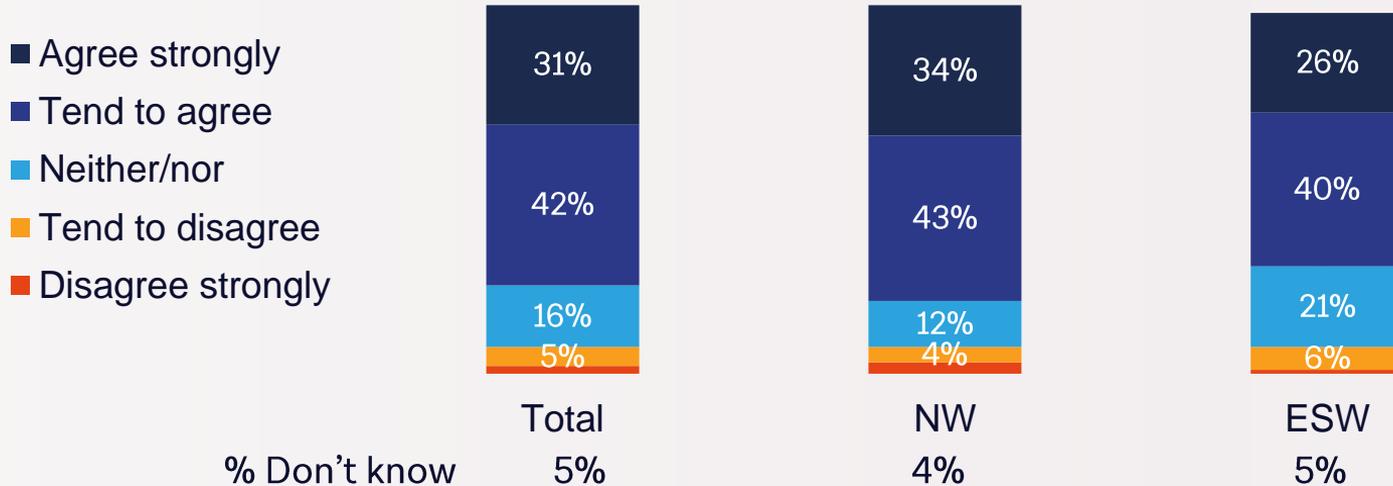


Q8a. Northumbrian Water / Essex & Suffolk Water ... cares for the essential needs of its communities and environment, now and for generations to come. Base: All respondents (504), NW Region (300), ESW Region (204)

# Business values and principles

To what extent do you agree or disagree with the following statement?

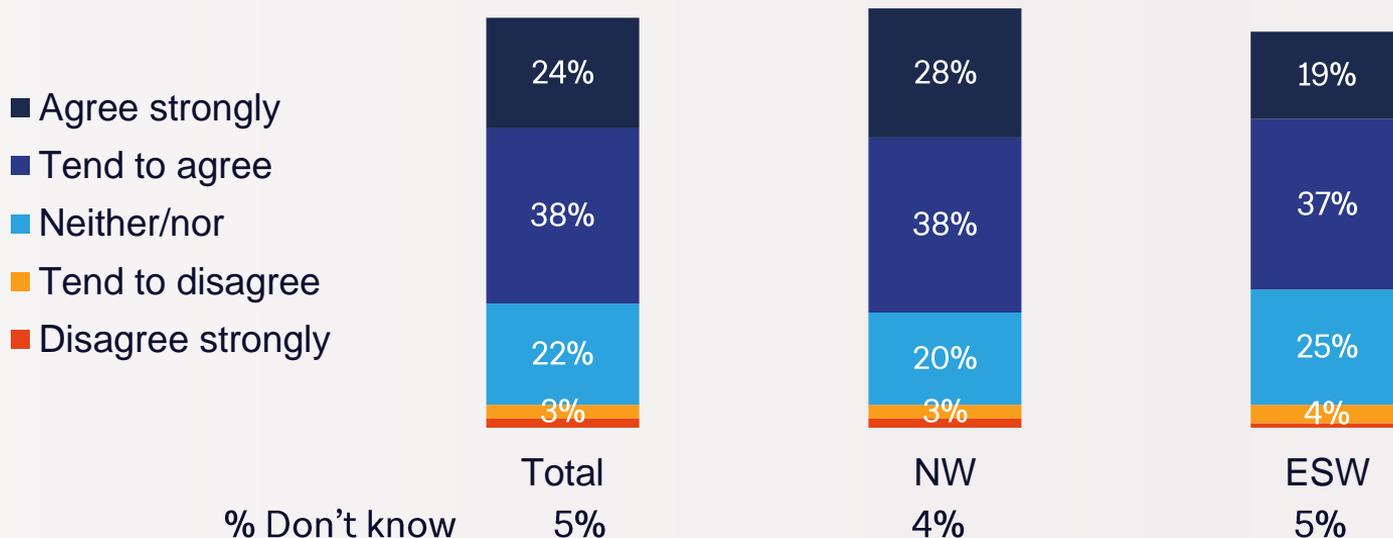
Northumbrian Water / Essex & Suffolk Water...provide reliable and affordable water [NW: and wastewater] services for its customers



# Business values and principles

To what extent do you agree or disagree with the following statement?

Northumbrian Water / Essex & Suffolk Water... make a positive difference by operating efficiently and investing prudently, to maintain a sustainable and resilient business





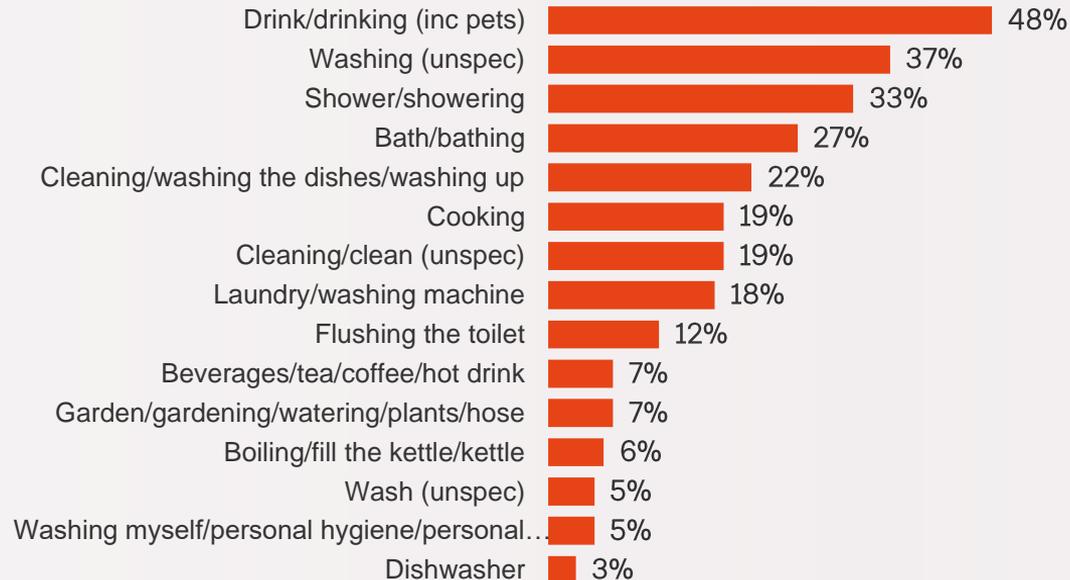
# Value of Water

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# Drinking continues to be one of the first things that comes to consumers mind when thinking about water use at home

First 3 things that come to mind when asked what you use water for at home? (unprompted)





# Key metrics

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# NPS

If people were able to choose their water and sewerage provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water] to a friend or colleague? Please use a scale of 0-10, where 0 is 'not at all likely' and 10 is 'extremely likely'



NPS: +39.3  
(+12.1 vs. last wave)

Higher among women, 18-34s and those in the North East  
Also higher among those who have visited a leisure site (+55.9)

# Top reasons for NPS scores

## Promoters 9-10s (203)

Had no problems – 22%  
Good service / customer service – 22%  
Good company / good in general / very good – 20%  
Reliable / trustworthy / transparent / honest – 9%  
Good water quality – 8%

## Passives 7-8s (119)

Had no problems – 27%  
Good service / customer service – 14%  
Good company / good in general / very good – 13%  
Good / fair price / good value – 8%  
Nothing to compare against / no choice / no real dealings – 8%

## Detractors 0-6 (55)

Nothing to compare against / no choice / no real dealings – 22%  
Don't recommend anything to anyone / no one to recommend to – 13%  
Expensive / depends on price – 11%  
Ok / fine / satisfied – 11%  
No better / worse than any other supplier / its just a water company – 11%

# Value for money

Using a scale of 0-10, where 0 is very dissatisfied and 10 is very satisfied, how satisfied would you say you are with Northumbrian Water / Essex & Suffolk Water in terms of value for money?



**Mean score: 7.7**  
**(+0.2 vs. last wave)**

**Higher among women and 18-34s**

**Also higher among those who have visited a leisure site (8.3)**

# Meaning of value for money in this context

What does 'value for money' mean to you, when you think of Northumbrian Water / Essex & Suffolk Water?

Affordable bills – 26%  
Reliable water supply – 23%  
Good water quality – 21%  
Only paying for what you see – 13%  
Low cost – 9%  
Resilient infrastructure – 2%



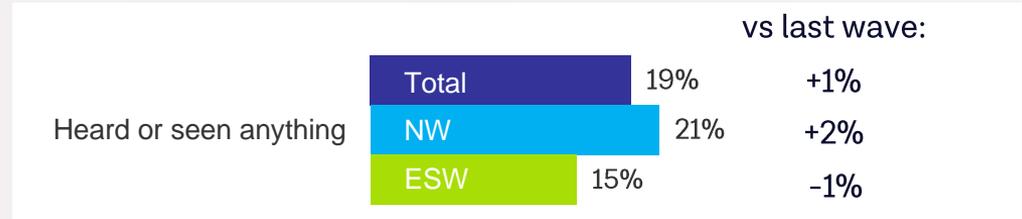
# Unprompted campaign awareness

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# Just under a fifth spontaneously recall any NWG activity

*Apart from your water bill, can you think of anything you have seen or heard from, or about, Northumbrian Water / Essex & Suffolk Water, in the last 6 months or so?*



Numbers of completely spontaneous mentions of campaign activity and/or other topics were as follows:

	Nos.	Total	NW	ESW
Dwaine Pipe / information on what to flush / put down drains / blocked drains information		3	3	-
Information about work being done / seeing work being done		4	2	2
Water saving advice / devices		3	2	1



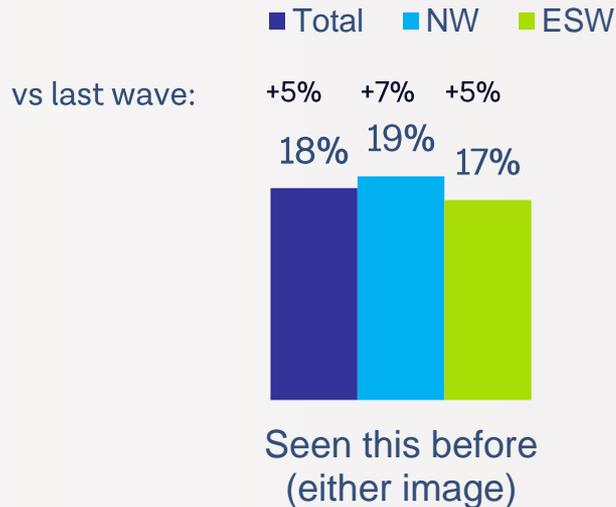
Just Add Water

**NWG**  
*living water*

TRINITY  
MCQUEEN

# The proportion of customers who have seen either images has increased from the previous wave

Do you recall seeing either of these, before today?  
(both images shown, with 'yes' / 'no' for each)



Seen Quality Matters

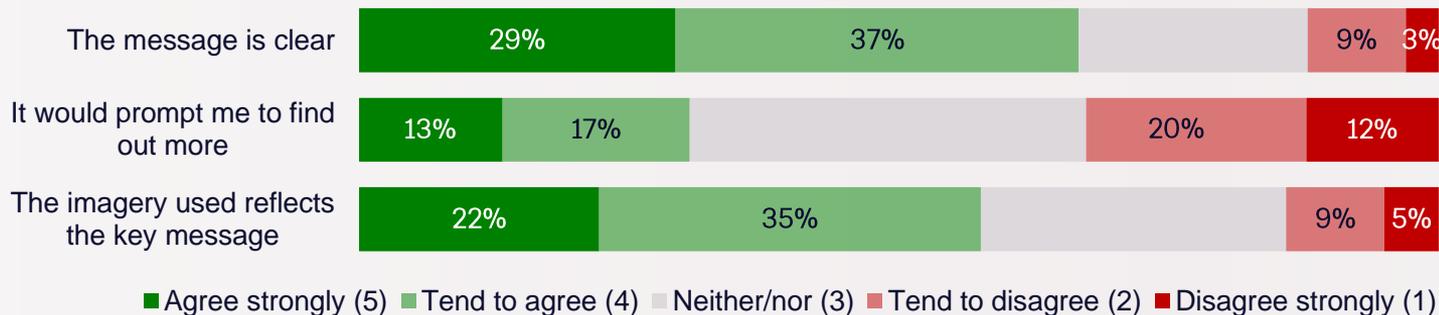


Seen Helping Hand

Q13. Here are some examples of [Northumbrian Water / Essex & Suffolk Water] campaign materials. Do you recall seeing either of these, before today? Base: All respondents (503), NW Region (299), ESW Region (204)

# While most feel the ads are clear, the call to action is not as strong

Please tell me to what extent you agree or disagree with the following statements, about this material?



Those aged 18-34 are more likely to agree with each statement

# Main message of the Just Add Water ads

*What do you think these ads are trying to say? (open)*

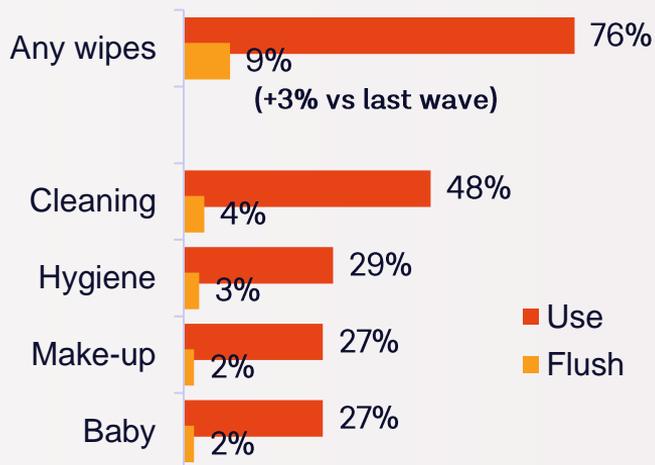
	Just add water
Base: shown this image	(504)
Implies water is clean and safe / quality water / fresh	29%
Highlights how important water is / sensible	18%
Encourages people to drink more water / stay hydrated	10%
Reliable supply / always there	7%
Water / they provide water / a water company	7%
Promoting the brand	7%
Nothing / no interest	4%
Just add water	4%
For all generations / for everyone	4%
Confusing / don't know what it means	3%
Good / great / like it	3%
Living Water	2%



# Blockages (NE only)

# Just over 3 in 4 use wipes of some sort. Just under 1 in 10 (9%) claim to flush wipes down the toilet

What types of wipes do you use, in your household? Which of these do you ever flush down the toilet?



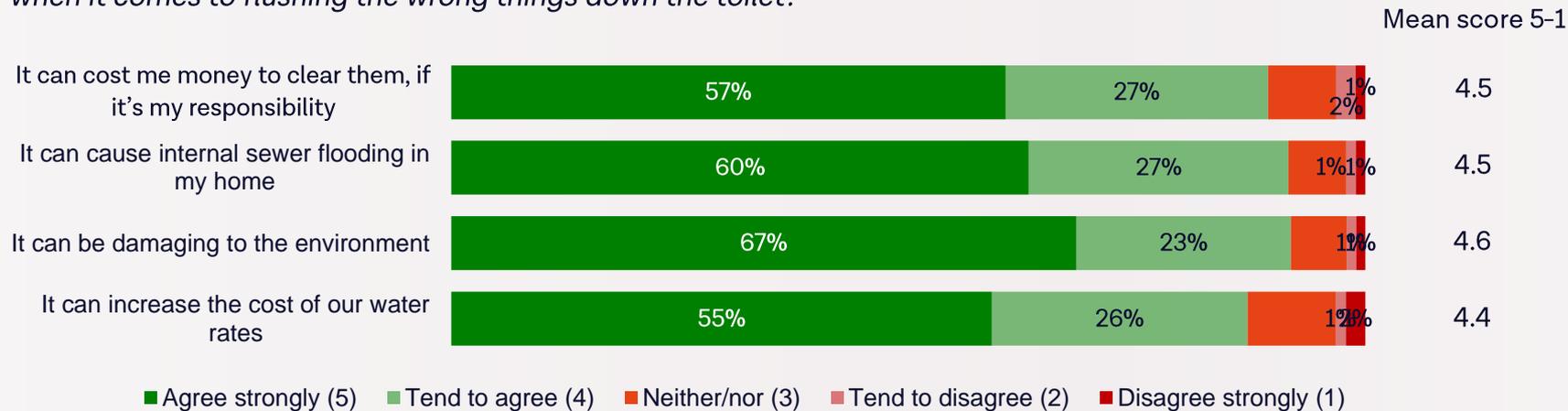
44 consumers say they ever flush wipes. Why?

- The packaging says they are flushable (25)
- More hygienic than putting in a bin (19)
- Ease / convenience (15)
- They're just like toilet paper (10)
- They're small enough to flush (8)
- No bathroom bin (5)
- Not aware of any reason not to (3)

# There is an almost universal level of understanding of the impact of flushing wipes

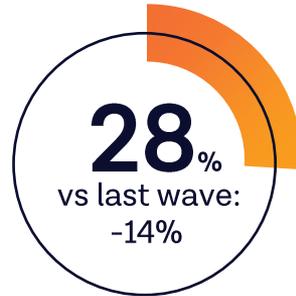
Are you aware that flushing wipes can cause blockages? **94%** vs last wave: -3%

To what extent do you agree or disagree with the following statements, when it comes to flushing the wrong things down the toilet?



Can be damaging to the environment – higher among women

# Just over 1 in 4 recall seeing anything from Northumbrian Water related to what should or shouldn't be flushed

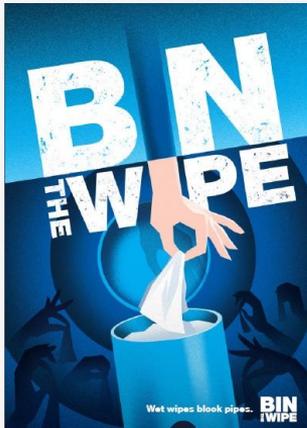


**Have seen, heard or read anything from Northumbrian Water saying what you should or shouldn't flush down the toilet**

# More than 1 in 3 recall seeing the 'bin the wipe' execution, with the 'wipes flood gardens' having the lowest recall

Here is an example of Northumbrian Water campaign materials. Do you recall seeing or hearing anything about this campaign, before today? (all images shown, with 'yes'/'no' for each)

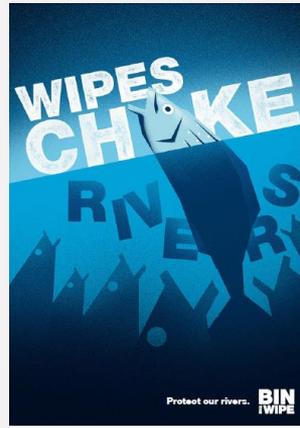
41% (any images)



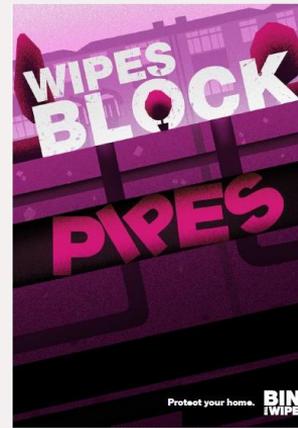
35%



20%



20%



21%



20%



18%

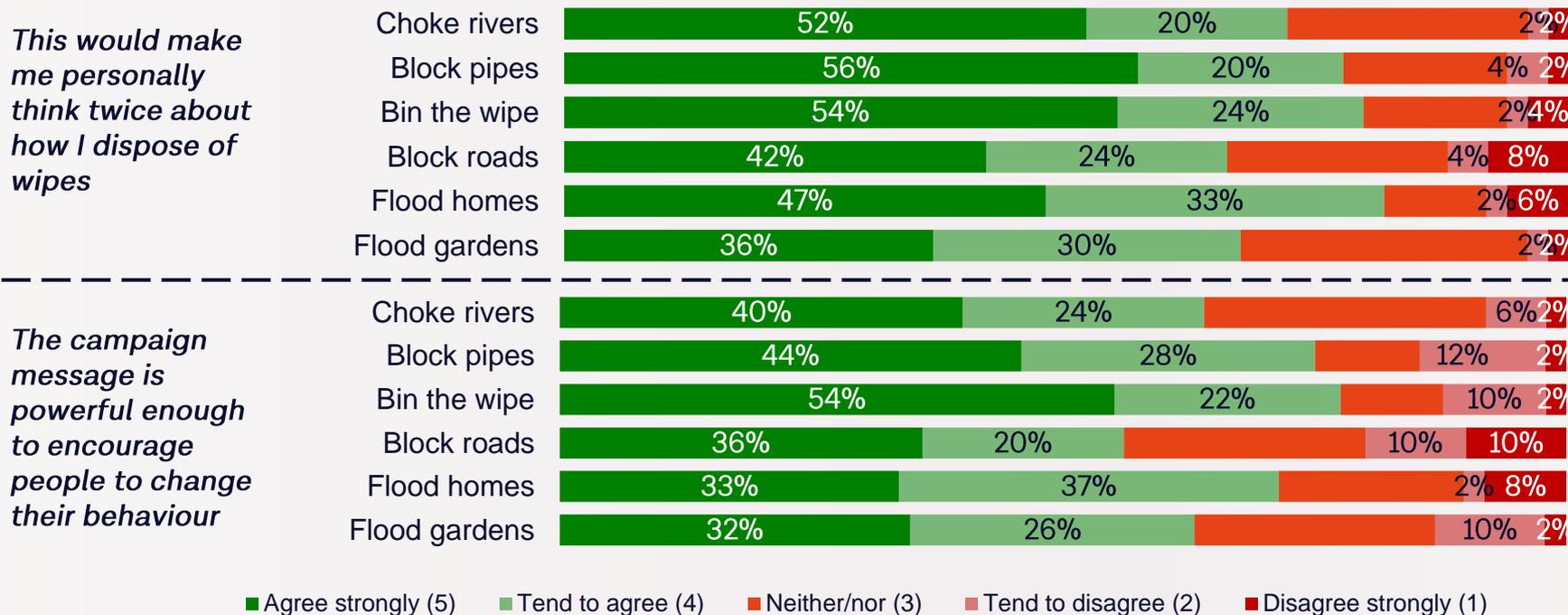
# The main messages of each of the campaigns resonate with customers

What is your first thought when you see this advert? (open)

	Bin the wipe	Block roads	Choke rivers	Block pipes	Flood homes	Flood gardens
Don't flush wipes down the toilet/bin the wipe	16%	40%	10%	8%	8%	20%
Easy to understand / clear / straight to the point/simple	9%	8%	10%	4%	22%	10%
Wipes etc block drains / effects of blockages / cause flooding	9%	8%	12%	2%	16%	6%
Good / I like it / appealing	9%	12%	4%	10%	6%	10%
Impacts on the environment / pollution / fish / oceans / rivers / wildlife etc.	6%	-	-	34%	-	-
Unclear / not an obvious message	5%	-	10%	-	2%	8%
Great message / important / everybody needs to be made aware	4%	4%	4%	4%	-	4%
Striking / dramatic / bold / attention-grabbing / eye catching	3%	6%	2%	2%	4%	2%
Common sense	3%	8%	2%	2%	2%	4%
Scary / creepy / disturbing / alarming / worrying / shocking	2%	-	6%	4%	-	-
Makes you stop and think / reconsider your choices	2%	2%	4%	-	2%	2%
Indifferent / neutral	2%	-	-	2%	-	6%
Doesn't apply to me / I don't do this	2%	4%	4%	2%	2%	-

# Bin the Wipe is the most effective poster in encouraging customers to change their behaviour

Please tell me to what extent you agree or disagree with the following statements, about this material





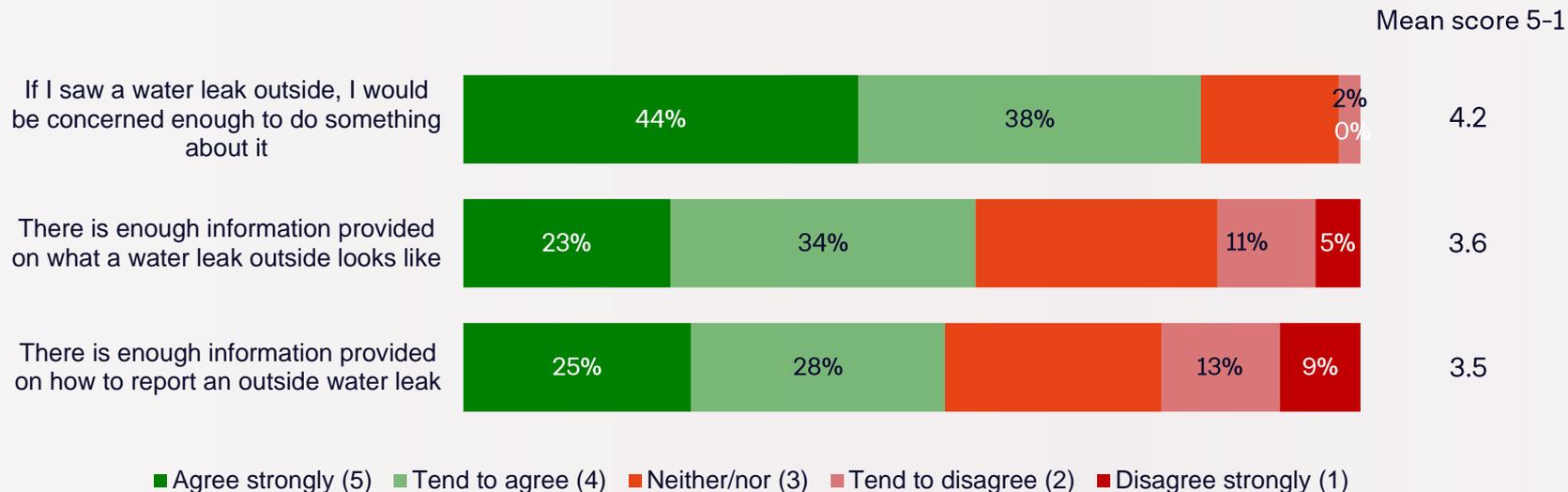
Leakage

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# Just over 4 in 5 would report a leak they see outside, but only half believe there is enough info on how to report it

To what extent do you agree or disagree with the following statements:



**Would be concerned enough to do something – higher among 55+**  
**Enough information provided on what a water leak outside looks like – higher among 65+**

# 54% say they would report a leak to their water company – but most would only report a major issue

*What would you do if you saw a water leak on the road, path or in a public area? (open)*

- Report it to water company (54%)
- Search online for who to report it to (36%)
- Report it to the council (19%)
- Nothing / ignore it (8%)
  
- Don't know (8%)

*Which of these examples, if any, would you report, if you saw them in a road, path or public area?*



**25%**



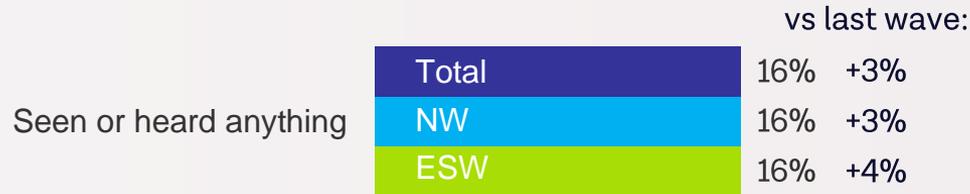
**83%**



**40%**

# While recall of any messaging is limited, there have been small directional increases

*Have you seen, heard or read anything from Northumbrian Water / Essex & Suffolk Water about what to do if you saw a leak?*



# Phone is the default choice for many when looking to report a leak

*If you were going to report a leak to Northumbrian Water / Essex & Suffolk Water, how would you do it? (open)*

	Total	NW	ESW
Phone	56%	55%	59%
Email	22%	22%	23%
Webchat	11%	11%	11%
Twitter	6%	6%	7%
Facebook	8%	9%	6%
Look on website for how to do it	36%	33%	41%
Don't know	5%	5%	4%
Wouldn't do it	1%	1%	1%



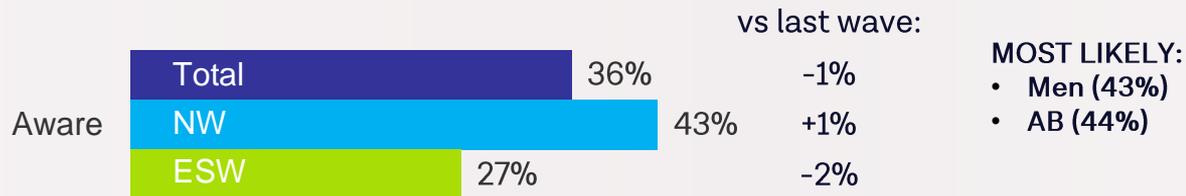
# Waterside Parks

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# Just over 1 in 3 are aware of the NWG Waterside Parks

Are you aware that Northumbrian Water / Essex & Suffolk Water operates a series of Waterside Parks that are open to visitors, including Derwent, Fontburn and Hanningfield Waterside Parks and Kielder Waterside?

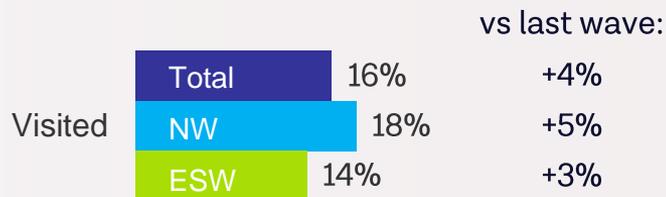


How did you hear about these Parks?

	Total	NW	ESW
Word of mouth	41%	41%	42%
Internet search	18%	18%	20%
Facebook	22%	19%	29%
Newspaper article	15%	15%	16%
Waterside Parks UK website	9%	9%	9%
Instagram	11%	8%	18%
Twitter	11%	10%	15%
'This is Durham'	5%	6%	4%

# There has been a small uplift in the proportion visiting Waterside Parks

*Have you visited any of these Waterside Parks in the last 12 months or so?*

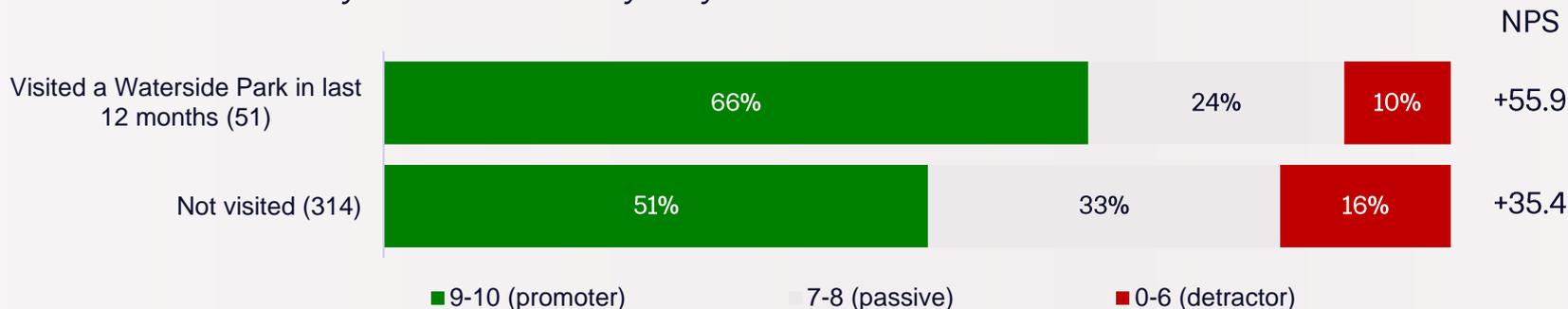


*Which one(s)?*

	Total	NW	ESW
Derwent	8%	11%	4%
Kielder	4%	6%	2%
Hanningfield	6%	4%	10%
Fontburn	5%	5%	4%

# Net Promoter Score – Waterside Parks visitors

*If people were able to choose their water and sewerage provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water] to a friend or colleague? Please use a scale of 0-10, where 0 is 'not at all likely' and 10 is 'extremely likely'*



**NPS among Waterside Parks visitors - 2021 total was:**

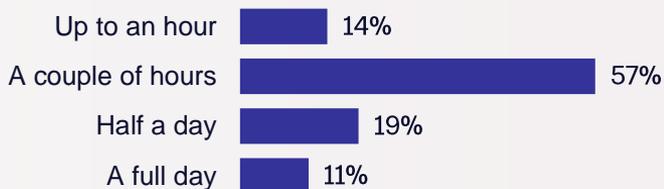
**+ 58.8**

**Visitors give a significantly higher NPS score**

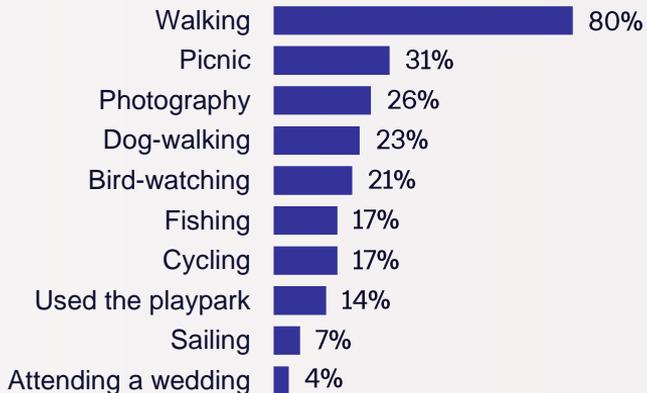
Q9a/40a. *If people were able to choose their water and sewerage provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water] to a friend or colleague? Please use a scale of 0-10, where 0 is 'not at all likely' and 10 is 'extremely likely' Have you visited any of these Waterside Parks in the last 12 months or so? Which one(s)? Base: All respondents (503)*

# Motivations for visiting Waterside Parks

*If you've visited for a day trip (as opposed to staying overnight), on average how long would you stay?*

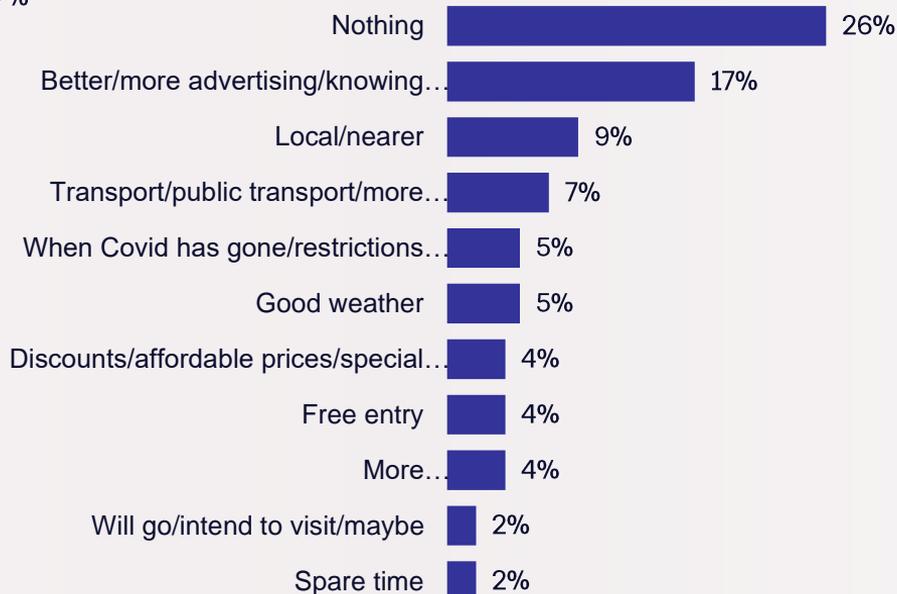


*What have you done there?*



Base: visited Waterside Park in last 12 months (81)

*What would encourage you to visit one of these parks? (open)*

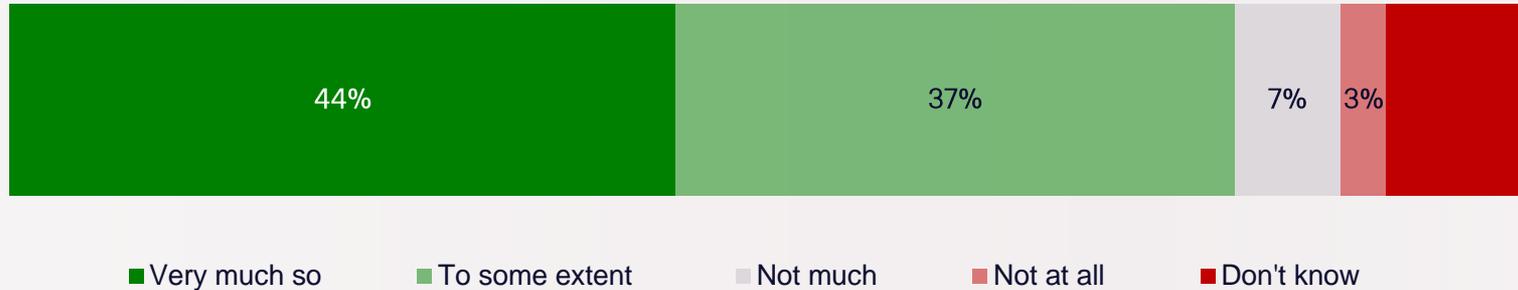


Base: not visited a Waterside Park in last 12 months (423)

Q40b2/c/d. If you've visited for a day trip (as opposed to staying overnight), on average how long would you stay? What have you done there? What would encourage you to visit one of these Parks?

# Having Waterside Parks available for the public to access is considered a good thing

*To what extent do you think that having the Waterside Parks available for the public to access is a good thing for [Northumbrian Water / Essex & Suffolk Water] to offer?*





# Website

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# Visiting the website

Have you ever visited the Northumbrian Water / Essex & Suffolk Water website?

vs last wave:

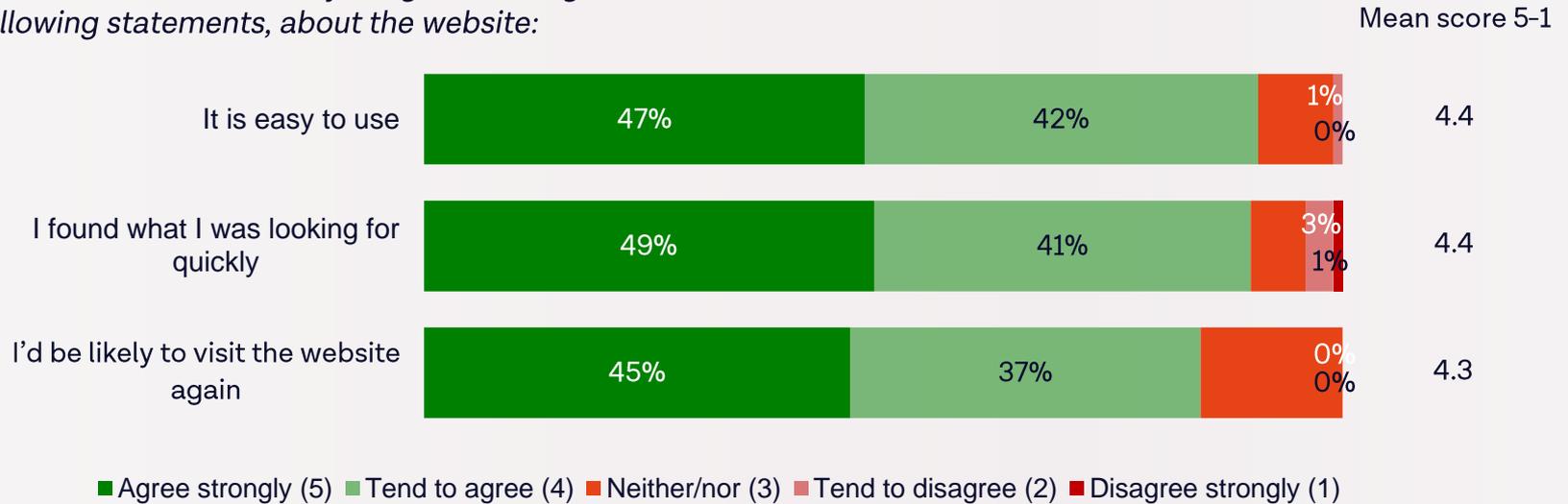
Visited	Total	47%	-1%
	NW	48%	-3%
	ESW	47%	+5%

What were you looking for?

	Total	NW	ESW
To check your account	55%	55%	56%
To pay a bill	33%	33%	34%
To change address / moving house	10%	11%	8%
To set up / change / cancel a direct debit	15%	13%	18%
For information on, or to get, a water meter	13%	13%	12%
To register for e-billing	17%	11%	26%
To find a contact number / email address	8%	8%	7%
For information on water saving, or to get a water saving device	12%	11%	14%
For information on works being carried out	8%	10%	4%
To report a leak	11%	9%	15%
To report a water supply / quality issue	6%	6%	5%
For information on prices / tariffs	8%	8%	9%
To download the app	9%	10%	8%
For information on their leisure sites	5%	4%	5%

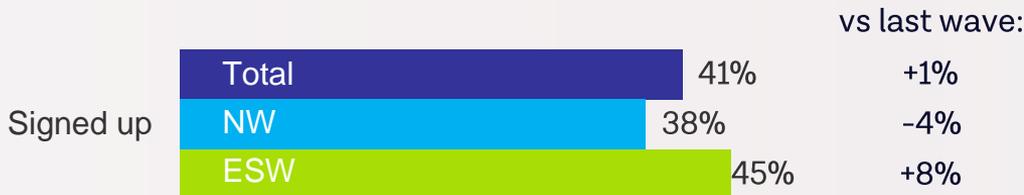
# The majority believe the website is easy to use

Please tell me to what extent you agree or disagree with the following statements, about the website:



# E-billing sign-up

Are you signed up for e-billing with  
Northumbrian Water / Essex & Suffolk Water?



Base: all respondents (503)

Is there a reason why you would not want to sign up to e-billing? (open)

	Total	NW	ESW
Nothing	33%	31%	34%
Prefer paper bills	38%	36%	41%
Didn't know about it/never considered	8%	7%	9%
Water bill included in my rent/not the bill payer	6%	5%	7%
Better online security	8%	6%	11%
Too many emails/may forget to check/delete	12%	11%	13%

Base: not signed up (233)

An aerial view of a stone-paved plaza with a diagonal shadow. Two people are looking at their smartphones. One person is in the lower-left, wearing a dark shirt and shorts. The other is in the upper-right, wearing a light blue shirt, dark pants, and a backpack.

# Priority Services

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# There has been little change in awareness levels of the priority services support with a fifth aware

Have you seen, heard or read anything from Northumbrian Water / Essex & Suffolk Water about how they can help people who may....

....be struggling to pay their household bills?

		vs last wave:
Total	20%	+/-
NW	20%	+1%
ESW	20%	-2%

....need extra support in other ways?

		vs last wave:
Total	19%	+2%
NW	19%	+2%
ESW	18%	+/-

Here is an example of the campaign materials. Do you recall seeing or hearing anything about this, before today?



Seen or heard anything

		vs last wave:
Total	16%	+1%
NW	16%	+/-
ESW	16%	+1%

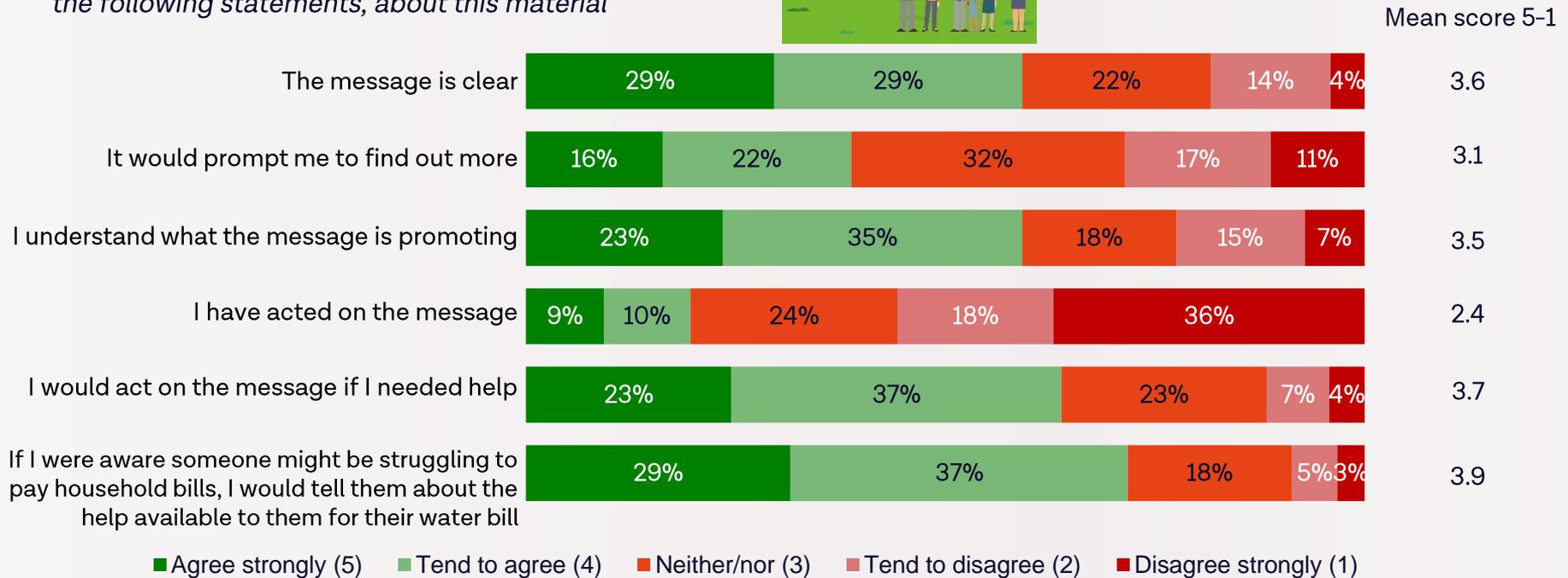
Where have you seen or heard about this?

	Total	NW	ESW
Newspaper	40%	48%	27%
On their website	37%	28%	52%
Social media	33%	32%	33%
Magazine	29%	30%	27%
TV	29%	28%	30%
Poster on side of bus	18%	20%	15%
In with the bill	18%	12%	27%
Poster on bus stop / shelter	14%	14%	15%

Q44a/b. Have you seen, heard or read anything from [Northumbrian Water / Essex & Suffolk Water] about how they can help people who may ....be struggling to pay their household bills?..... need extra support in other ways? Q45a. Here is an example of the campaign materials. Do you recall seeing or hearing anything about this, before today? Base: All respondents (504), NW Region (300), ESW Region (204). Q45b. Where have you seen or heard about this? Base: All who have seen / heard about Water Without the Worry (83), NW Region (50), ESW Region (33)

# The message is relatively clear, with over half understanding what the message is promoting

Please tell me to what extent you agree or disagree with the following statements, about this material





The app

**NWG**  
*living water*

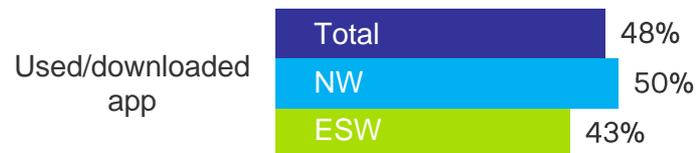
**T R I N I T Y**  
**M C Q U E E N**

# Awareness of the app has increased from the last wave

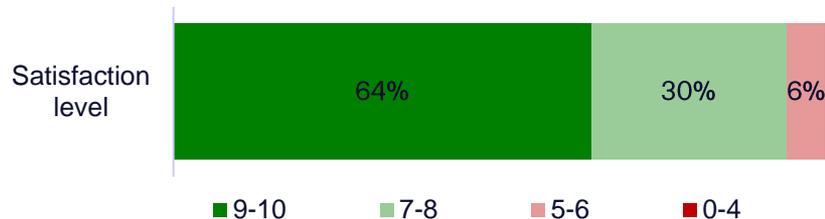
Did you know that Northumbrian Water / Essex & Suffolk Water has an app, to manage your account?



Have you used or downloaded the app?  
(% of those aware of app)



How satisfied are you with the app (10 = extremely satisfied)?



What other things would you like to see included in the app?

Nothing / don't know	62%
More / detailed information	3%
Easier to use / navigate	2%
Rewards	2%

Q47aa. Did you know that [Northumbrian Water / Essex & Suffolk Water] has an app, to manage your account Base: All respondents (504) Q47a. Have you used or downloaded the app? Base: All those aware of the app (181). Q47b. Using a scale of 10 to 0, where 10 is very satisfied and 0 is very dissatisfied, how satisfied are you with the app? Q47c. What else, if anything, would you like to see in the app? Base: All those who use the app (84).

# Providing an incentive or discount could encourage customers to use an app

Is there anything that might encourage you to use an app from Northumbrian Water / Essex & Suffolk Water?

- Nothing – 45%
- Don't like / trust apps / too many apps already – 9%
- Incentive / discount / reduced bills – 6%
- No phone / smartphone – 5%
- See water usage / costs – 5%
- More information about it / invite to join – 3%
- View bill / account – 3%

I like mine...



**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# The 'I like mine hot' campaign is recalled more than the 'cold' version. Most have seen it on social media or TV

Do you recall seeing either of these, before today?  
(both images shown)



	Overall	NW	ESW
Have seen either	21%	20%	24%
	15%	15%	15%
	18%	18%	19%

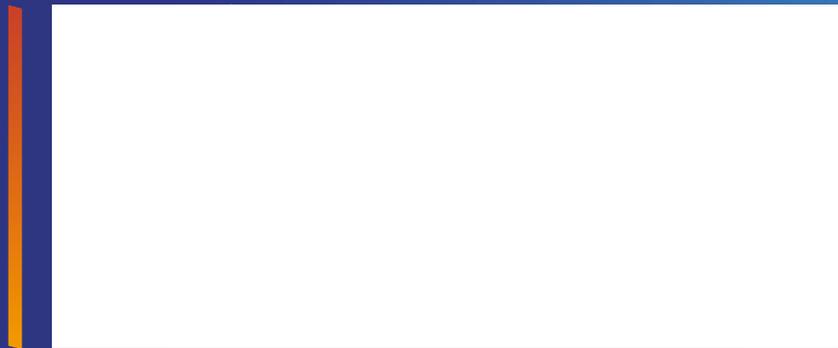
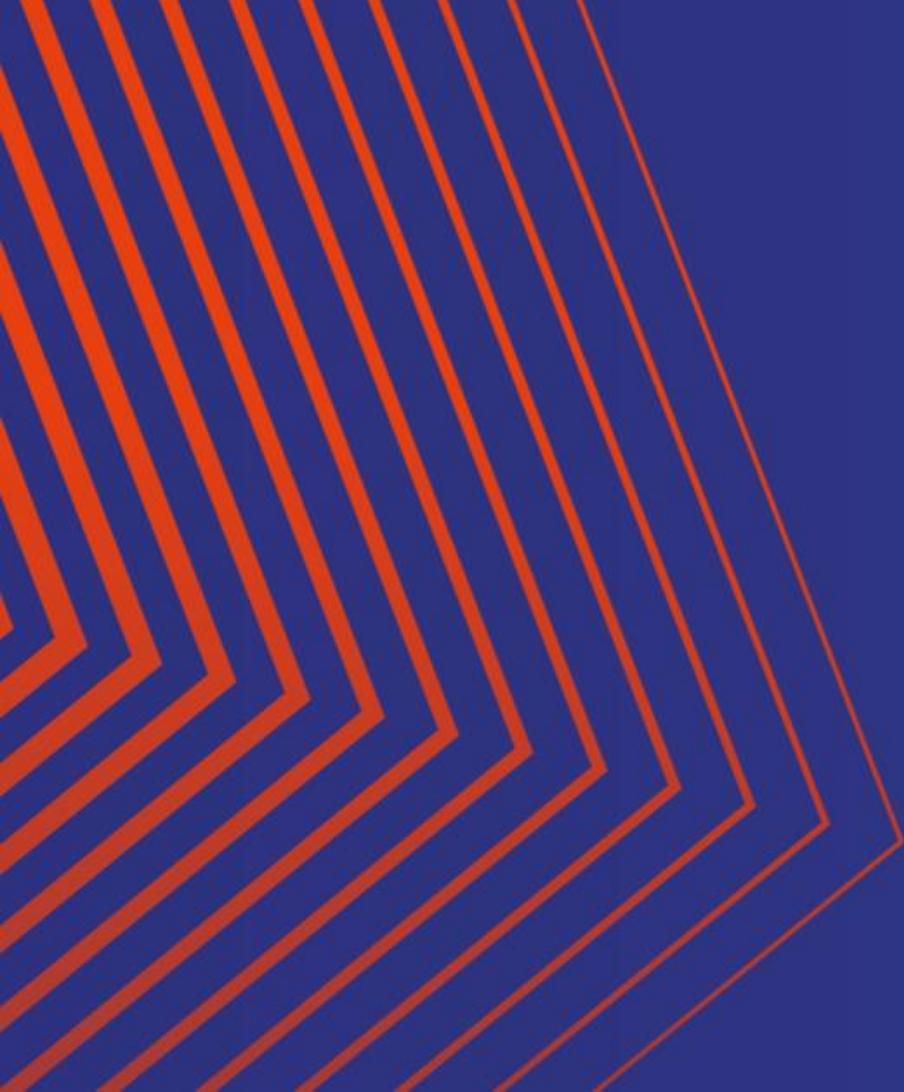
Where have you seen this?

	Total (109)	NW (61)	ESW (48)
Social media	33%	38%	27%
TV	31%	25%	40%
Newspaper	30%	41%	17%
Magazine	28%	31%	23%
Poster on bus stop / shelter	22%	21%	23%
Poster on roadside billboard	18%	23%	13%
On their website	17%	16%	17%
Poster on side of bus	13%	13%	13%
In with the bill	12%	11%	13%
Radio	7%	8%	6%
Leaflet through the post/door (not in with the bill)	6%	7%	6%
Train / Metro	4%	5%	2%
On a van	3%	3%	2%

# A fifth believe the ad is trying to show how versatile water can be

What do you think this ad is trying to say? (open)

	Total	NW	ESW
Shows how versatile water is / people need it	18%	18%	20%
They do / can provide water however you want / like it	13%	14%	11%
Water is life / important	12%	12%	12%
Water is good / great / safe / clean	10%	8%	13%
Provide hot / cold water	8%	9%	6%
Water is all you need / just add water	5%	5%	5%
Use water / use more water (unspecified)	5%	5%	5%
Water / water supplier	5%	5%	4%
Water is always available	4%	4%	4%
Nothing / not a lot	3%	2%	4%
Encourages people to drink more water / healthy	3%	3%	3%
Good / like it	2%	3%	1%
Don't understand what it's about	2%	1%	3%



TRINITY  
MCQUEEN