



17 / 07 / 20

# Campaign awareness omnibus

## Results: Spring 2020

Our ref. J3068.1



DEFINING THE **CLEAREST** DIRECTION

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## The survey

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

Covering:

- 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)
- Usage of tap vs. bottled mineral water and recall of the Reuse, Refill, Repeat activity
- Action in the case of outside leaks
- Usage of NWG's Waterside Parks and website
- Recall of, and views on, the Priority Services campaign

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## Approach

On-going research programme previously carried out on the street, but this wave carried out online, screening out any who don't recognise the NW/ESW logo as being their water company

500 interviews

Independently sourced sample with respondents in qualifying postcode areas

500 interviews:

- 300 North; 150 Essex; 50 Suffolk

Fieldwork carried out:

10 June – 7 July 2020

Average interview length:

16 minutes



# Demographics

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Quotas were set to broadly match the profile of the population

<b>Sample profile</b>	<b>Total</b>	<b>NW</b>	<b>ESW</b>
Base: all respondents	(500)	(300)	(200)
Male	50%	50%	50%
Female	50%	50%	50%
18-34	24%	28%	19%
35-44	15%	16%	14%
45-54	19%	18%	20%
55-64	17%	15%	20%
65+	26%	23%	29%
AB	32%	28%	37%
C1/C2	47%	47%	46%
DE	22%	25%	18%



Brand



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## Water company recognition – an issue for ESW in the South

Respondents were shown 4 water company logos (NW, Anglian, Yorkshire and UU in the North, and ESW, Anglian, Thames and UU in the South), and asked which they recognised as being their water company. Any who failed to select Northumbrian Water in the North and Essex & Suffolk Water in the South at all, were screened out of the survey.

While in the North over three quarters of respondents who got this far selected NW, only a fifth of those in the South picked out ESW

Postcode area - North	Total	DH	DL	NE	SR	TD	TS
Base: all responding this far	(455)	(54)	(72)	(184)	(34)	(24)	(87)
Northumbrian Water	78%	91%	76%	85%	68%	25%	72%
United Utilities	5%	6%	-	5%	9%	17%	3%
Yorkshire Water	5%	2%	19%	1%	9%	-	2%
Anglian Water	4%	-	-	2%	3%	-	14%
None of these	9%	2%	4%	7%	12%	58%	8%

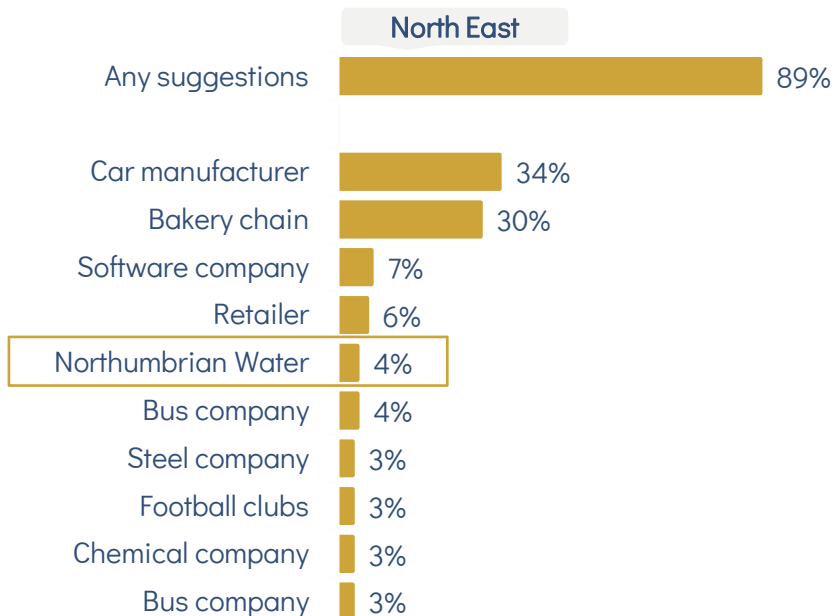
Postcode area - South	Total	CM	CO	IG	IP	NR	RM	SS
Base: all responding this far	(1144)	(253)	(177)	(47)	(332)	(168)	(25)	(142)
Essex & Suffolk Water	19%	31%	4%	13%	8%	15%	44%	49%
Anglian Water	56%	28%	72%	2%	82%	69%	8%	35%
Thames Water	14%	21%	7%	81%	7%	7%	32%	9%
United Utilities	3%	4%	1%	4%	1%	4%	8%	4%
None of these	8%	16%	16%	-	2%	5%	8%	4%

The rest of the results in this report are based just on the total 500 respondents who identified NW/ESW as their water company

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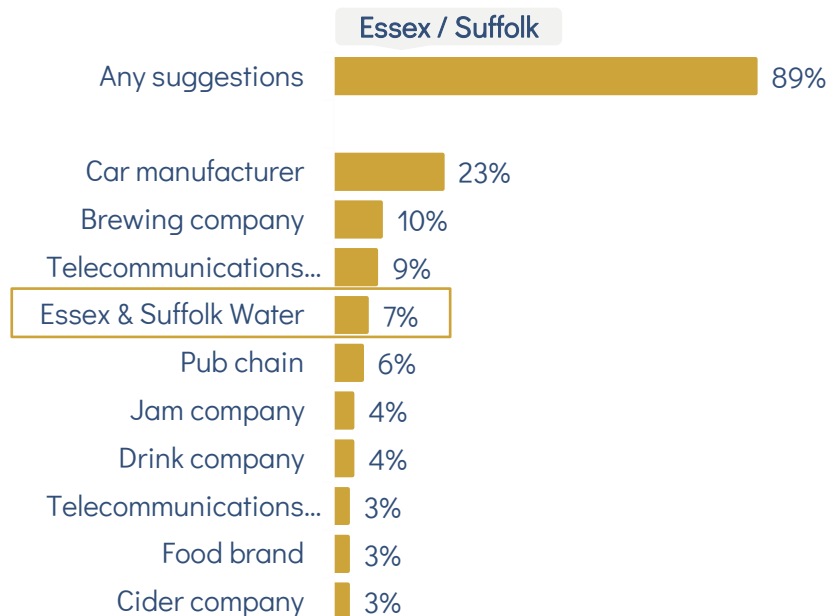
## Companies associated with each area

*Which companies do you most associate with the North East / Essex / Suffolk? (unprompted)*



Base: all respondents (300)

The 2019 results were higher (NW 18%, ESW 27%), but this will be down to the methodology – last year, on the street, respondents had to be told up front who the survey was on behalf of ('their water company'). This year, online, we could collect entirely unbiased responses



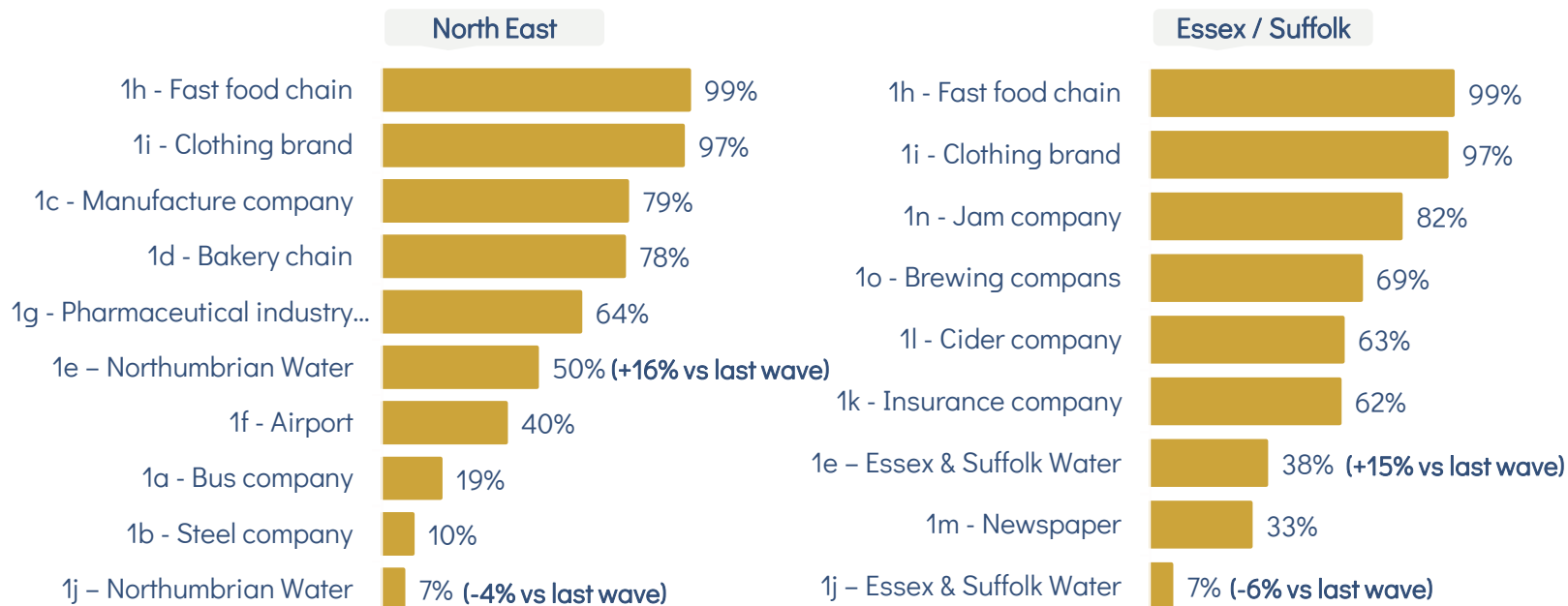
Base: all respondents (200)



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Recognition of the 'living water' part of the company's logo is stronger than that of the blue and green cross shape, across both areas

*Which of these logos, if any, do you recognise?*



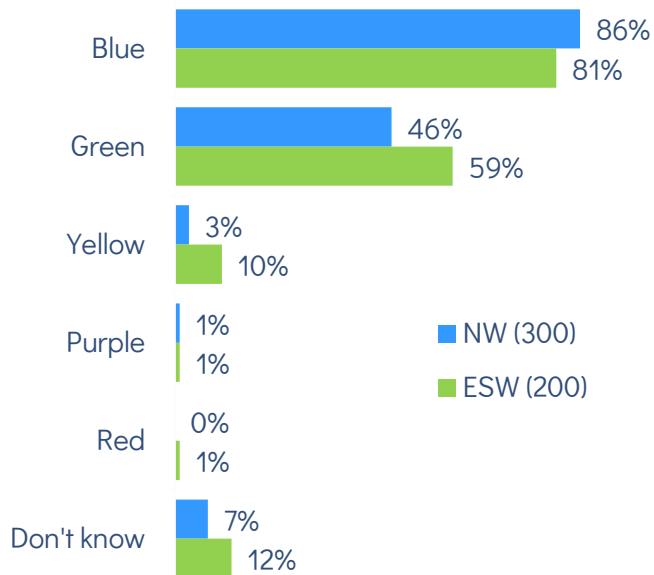
Base: all respondents (300)

Base: all respondents (200)

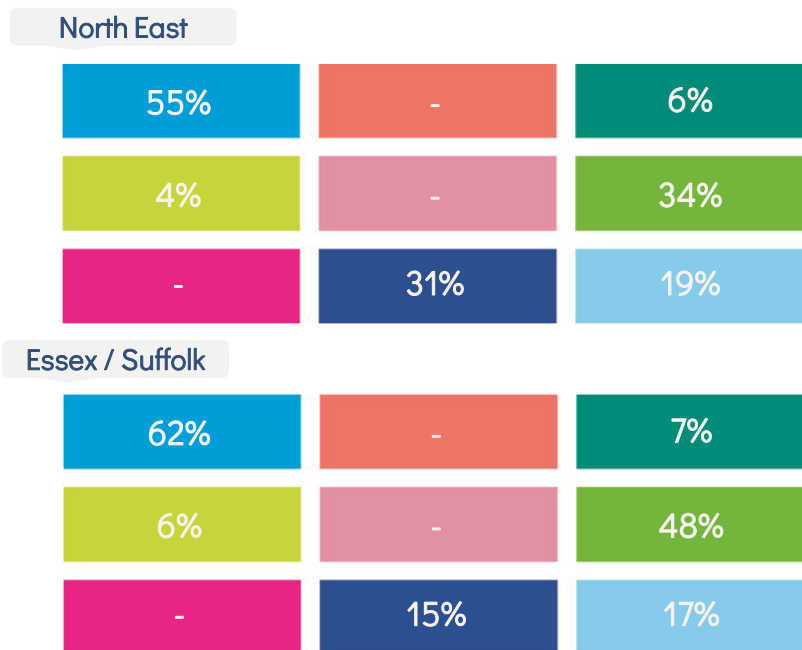


## Perceived brand colours

*What colours do you associate with the Northumbrian Water/ Essex & Suffolk Water brand?*



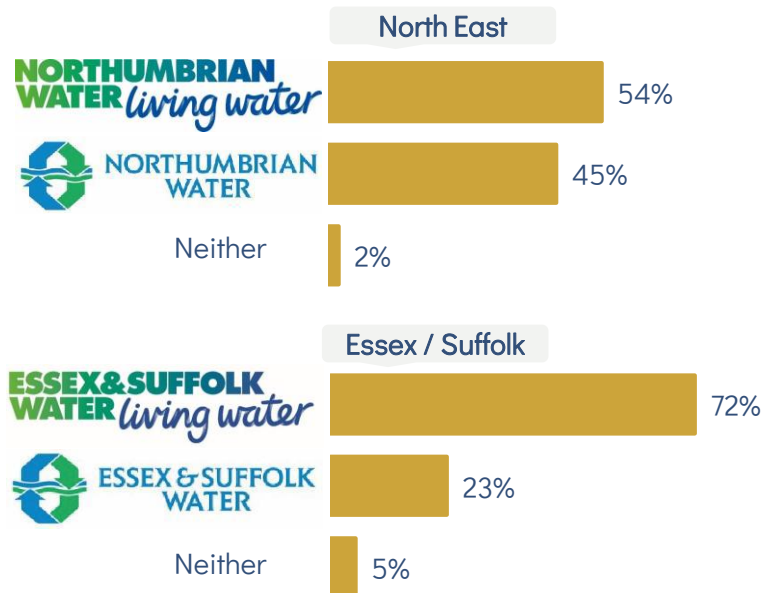
*Do you recognise any of these as being the Northumbrian Water / Essex & Suffolk Water brand colours?*



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## The old version of the logo is still strongly recognised in the North

Which of these logos, if any, do you most associate with Northumbrian Water / Essex & Suffolk Water?



How does this logo make you feel?  
(unprompted) - top mentions

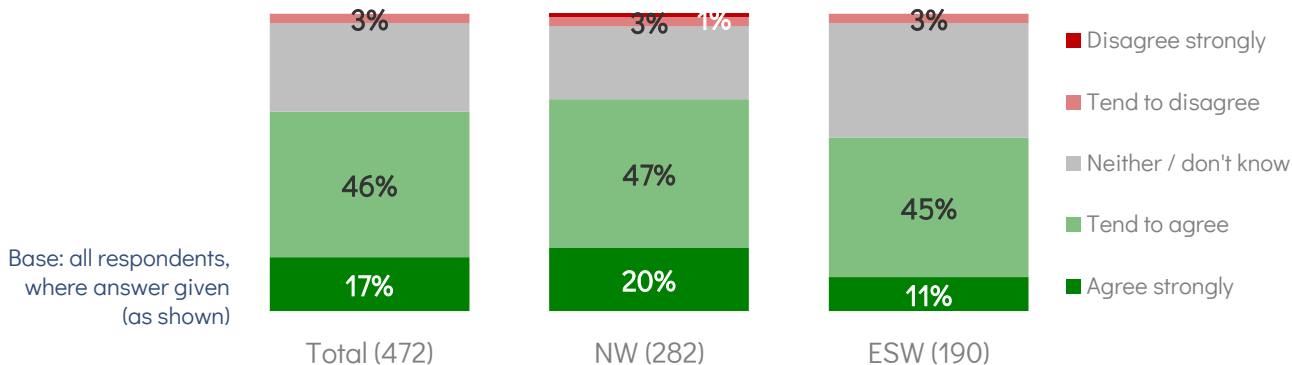
	NORTHUMBRIAN WATER living water	ESSEX & SUFFOLK WATER living water
Base: all respondents	(300)	(200)
Nothing/don't know	28%	26%
Neutral/indifferent	12%	11%
OK	8%	14%
Good/great	4%	6%
Comfortable	3%	3%
Confused	2%	5%
Happy	4%	2%
Fresh	4%	1%
Calm/relaxed	3%	2%
Positive	2%	1%
Safe	2%	1%



## 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'*



Higher among women and 18-34s

Also higher among those who recall having seen any NWG campaigns

*If agree, why? (top mentions)*

Good company/do a good job	14%
Had no problems	11%
Care about customers	10%
Good service	9%
Reliable service	8%
Not heard anything bad about them	6%

*If not/don't know, why not? (top mentions)*

Trustworthy	6%
Care about environment	6%
Good communication	5%
Quality/safe water	5%
Good/fair price	3%

Only interested in profits	12%
Poor water quality	4%
Slow to respond to issues	3%
No reason to believe otherwise	3%
They are okay	2%

Base: agree (315)

Base: disagree/neither (157)

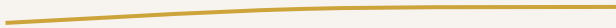
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Brand – this wave vs last

		Qtr 2 '20	2019	Difference
Cos. associated with region	NW (north)	4%	18%	-14%
	ESW (south)	7%	27%	-20%
Logo associated with the brand	New NW (north)	54%	83%	-29%
	Old NW (north)	45%	65%	-20%
	New ESW (south)	72%	87%	-15%
	Old ESW (south)	23%	25%	-2%
Agree good business principles and values	Total	63%	61%	+2%
	NW (north)	67%	66%	+1%
	ESW (south)	56%	53%	+3%



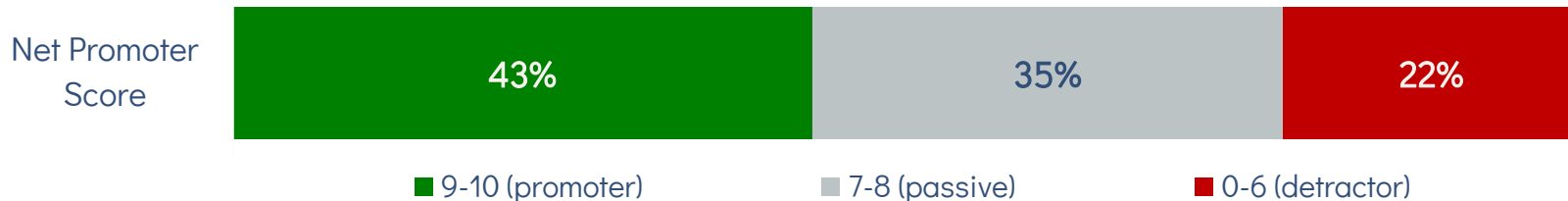
# Key metrics





## Net Promoter Score

*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'*



Base: all respondents, where answer given (377)

As many as 25% overall (and 30% in ESW and 35% of the 65+ age group) felt unable to give a score.

**NPS: +21.2**

Higher among women, 35-44s and C2/DEs  
Also higher among those who recall having seen any NWG messaging or campaign materials (+34.6)

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## Top reasons for NPS scores

### Promoters (scores of 9-10) – 162 respondents

- No problems (30%)
- Good customer service (19%)
- Good value/fair price (12%)
- Good company/do a good job (10%)
- Reliable/trustworthy (8%)
- No supply problems (5%)
- Good experience with them (4%)
- Good water quality (4%)
- Helpful (3%)
- Quick response (3%)
- Good communication (3%)
- Local/support community (2%)
- Been with them for years (2%)
- Environmentally good (2%)

### Passives (scores of 7-8) – 133 respondents

- No problems (23%)
- Good customer service (16%)
- Good company/do a good job (11%)
- Reliable/trustworthy (8%)
- No supply problems (6%)
- Good/fair price (5%)
- Expensive (4%)
- Helpful (3%)
- Good experience with them (3%)
- Environmentally good (3%)
- Good reputation (3%)
- Good water quality (2%)
- No reason not to (2%)
- Good communication (2%)
- Local/support community (2%)
  
- Nothing to compare against/no choice/had no real dealings with them (8%)

### Detractors (scores of 0-6) – 82 respondents

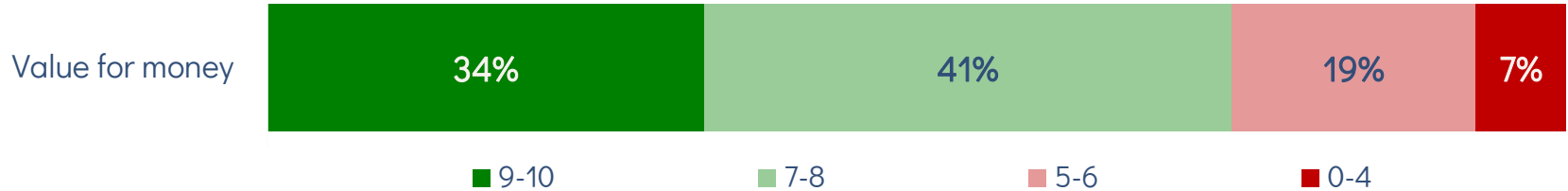
- Expensive (11%)
- Neutral/indifferent (6%)
- No problems (4%)
- Only interested in profit (4%)
- Okay/fine (4%)
- Good customer service (2%)
- Good company/do a good job (2%)
- Would look for best price (2%)
- Slow to resolve problems (2%)
- Don't recommend anyone/no-one to recommend to (11%)
  
- Nothing to compare against/no choice/had no real dealings with them (29%)





## 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?*



Base: all respondents, where answer given (416)

A majority were able to give an answer here, although 17% overall (and as many as 23% of C2/DEs) felt they did not have enough knowledge to give a score.

**Mean score: 7.5**

**-0.5 vs. last wave (autumn 2019)**

**Higher among women and 18-44s**

**Also higher among those who recall having seen any NWG messaging or campaign materials (8.0)**

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## 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?*

- Best/low cost / affordable (62%)
- Good/reliable service (24%)
- Good quality water (7%)
- Too expensive (7%)
- Reliable supply/no supply problems (5%)
- Only paying for what you use/meters (3%)
- No/minimal leaks (2%)
  
- Have no choice/nothing to compare against (5%)



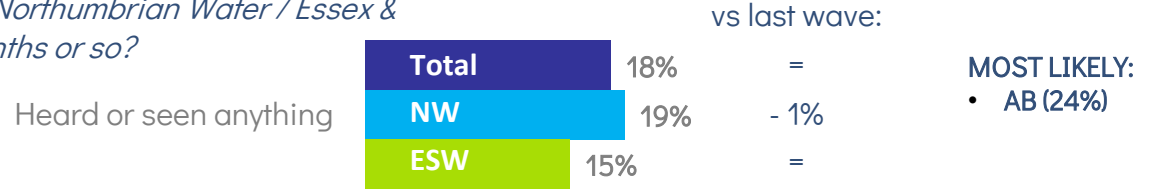
# Unprompted campaign awareness

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## Around a fifth spontaneously recall any NWG activity recently

*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
About work being done		15	12	3
About water saving advice/devices		13	4	9
Their cars/vans		7	5	2
Covid-19 related information		6	1	5
Dwaine Pipe/blocked drains/what not to flush		5	5	-
Advertising (unspecified)		5	3	2
About sewers/sewage		4	4	-
About Kielder reservoir		4	4	-



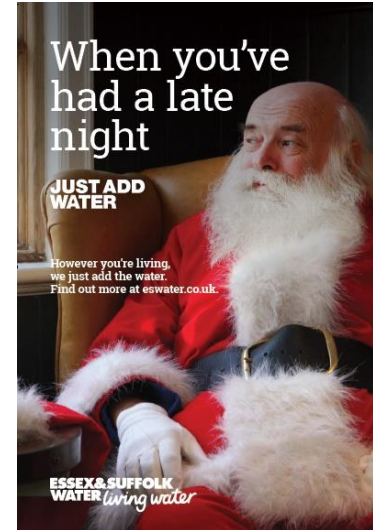
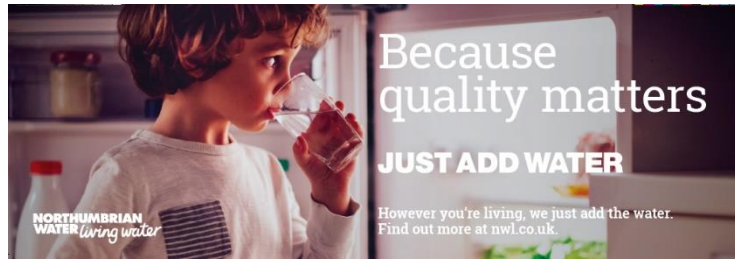
# Just Add Water

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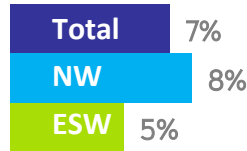
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## The 'Every Penny Counts' ad achieved higher recall than other variants

Here is an example of Northumbrian Water / Essex & Suffolk Water campaign materials. Do you recall seeing this, before today? (one image shown, at random)



Seen this before (all images)



### Specific images:

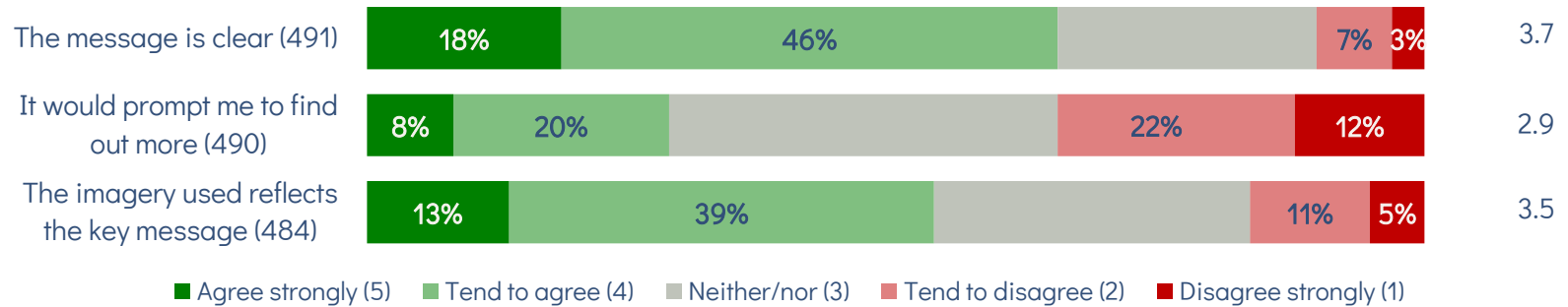
Every Penny Counts (shown only in Durham and Middlesbrough) – 13%  
 Quality Matters – 6%  
 Late Night – 5%



# 'Every Penny Counts' and 'Quality Matters' resonate better than 'Late Night'

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

Mean score 5-1



Message is clear - higher for Every Penny Counts (3.9) and Quality Matters (3.8) than for Late Night (3.5)  
Would prompt to find out more – higher for Every Penny Counts (3.3) and Quality Matters (3.0) than Late Night (2.7)  
Imagery reflects key message - higher for Every Penny Counts (3.7) and Quality Matters (3.7) than for Late Night (3.1)

All variants – higher among 18-44s



## Split opinions on the clarity of the initiative, but likely to be received positively

*What do you think about this initiative?* (open)

	Every Penny Counts	Quality Matters	Late Night
Base: shown this image	(76)	(223)	(201)
Good/great/like it	22%	19%	16%
Nothing/no interest	14%	16%	18%
Confusing/don't know what it means	16%	8%	15%
Clear/easy to understand	8%	7%	4%
OK	5%	6%	5%
Implies water is clean and safe/fresh	1%	7%	*%
Indifferent	-	2%	4%
Encourages people to drink water	-	3%	3%
Waste of money	1%	3%	2%
Simple	1%	3%	1%
Positive/strong/effective	5%	2%	*%
Pointless given they have a monopoly	-	4%	1%
Dull/bland	-	3%	1%





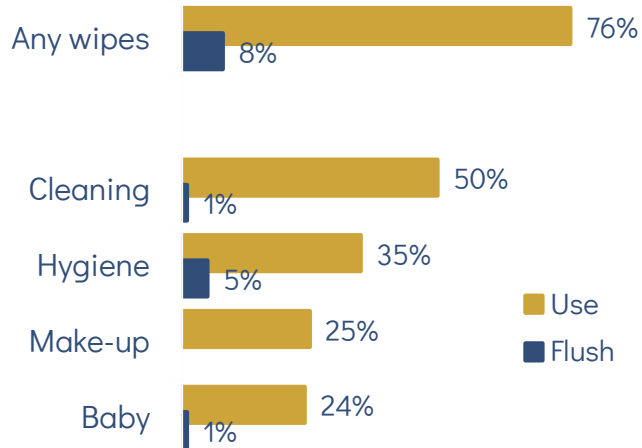
# Blockages (NE only)

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Around three quarters use any type of wipes; 8% (equating to 11% of all users) admit to flushing any down the toilet

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



24 consumers say they ever flush wipes. Why?

- The packaging says they are flushable (67%)
- More hygienic than putting in a bin (46%)
- They're small enough to flush (38%)
- Ease/convenience (29%)
- No bathroom bin (13%)
- Just like toilet paper (13%)
- Not aware of any reason not to (13%)

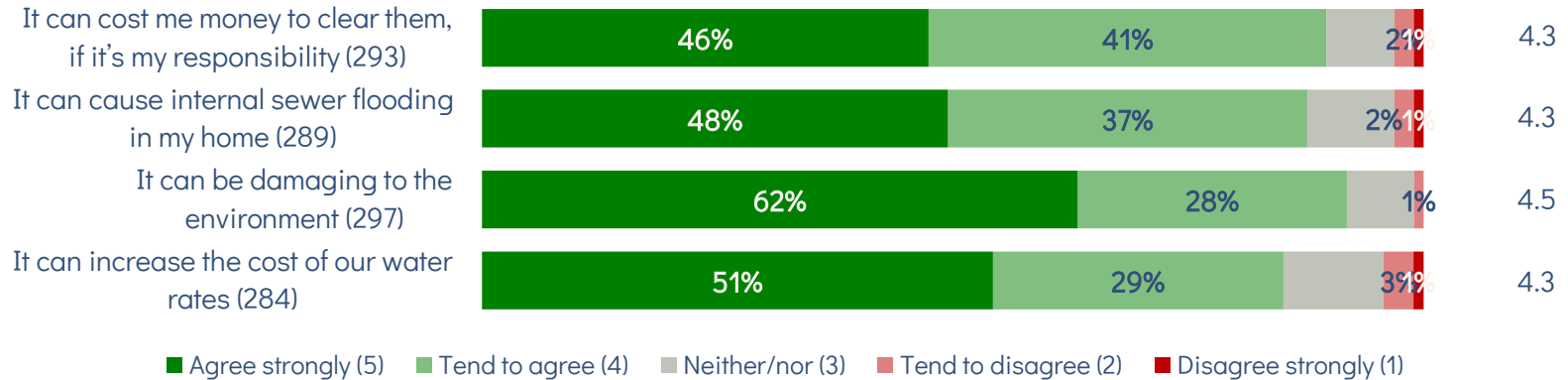


## The majority understand the potential impact of flushing wipes

Are you aware that flushing wipes can cause blockages? **96%**

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

Mean score 5-1



Can cause internal flooding and can increase water rates – higher among women  
Can increase water rates also higher among socio AB



## Over a third recall any blockages campaign messaging

*Have you seen, heard or read anything from Northumbrian Water saying what you should or shouldn't flush down the toilet?* **36%** vs last wave: +7% **MOST LIKELY:**  
• 45-64 (43%)

*What do you recall seeing or hearing?*

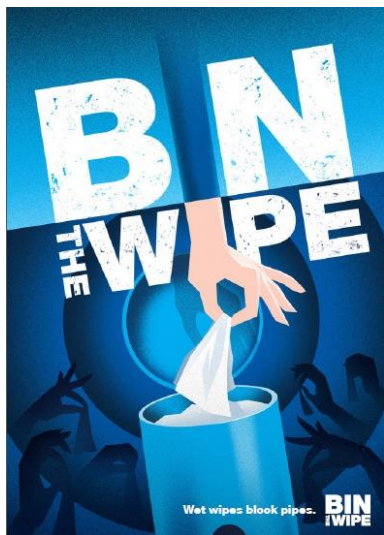
Dwaine Pipe/pee and poo	11%
Not to flush wipes	10%
TV/radio advertising	3%
TV programme	2%
Posters	1%
Leaflets	1%
Online	1%
On their vans	1%
On their website	1%
Advert with a picture of wipes	1%
Can't remember	2%

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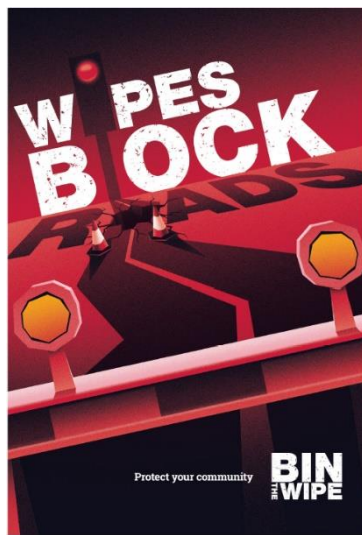
Recall of the BTW image of a wipe being binned is higher than for the rest

*Here is an example of Northumbrian Water campaign materials. Do you recall seeing or hearing anything about this campaign, before today? (one image shown, at random)*

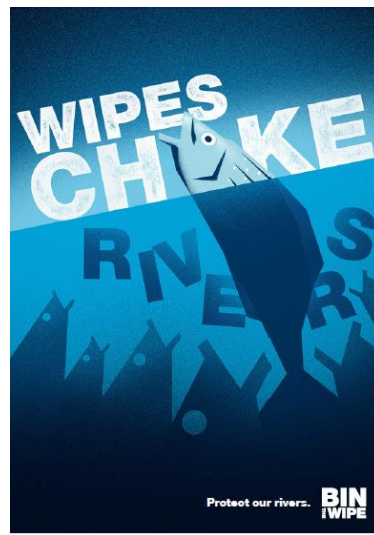
11% (all images)



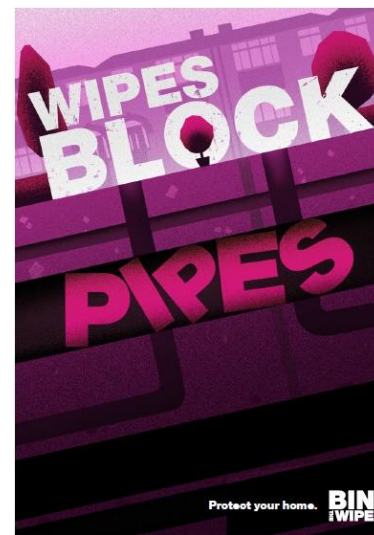
18%



5%



10%



10%

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## The campaign designs generally resonate strongly

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

	Wipes Block Pipes	Protect Community	Protect Rivers	Protect Home
Base: shown this image	(85)	(78)	(68)	(69)
Clear/to the point	22%	10%	7%	17%
Don't flush wipes down the toilet	15%	12%	7%	6%
Important message/everyone should be made aware	11%	3%	12%	9%
Good/like it	9%	3%	10%	9%
Impact on environment/fish	-	-	16%	3%
Common sense	9%	4%	-	1%
Unclear/message not obvious	2%	5%	6%	3%
Makes you think/consider behaviour	4%	3%	1%	7%
Misleading/confusing	1%	6%	6%	1%
Informative	1%	5%	3%	3%
Striking/dramatic/bold	1%	5%	-	6%
Strong message/powerful	2%	4%	4%	1%

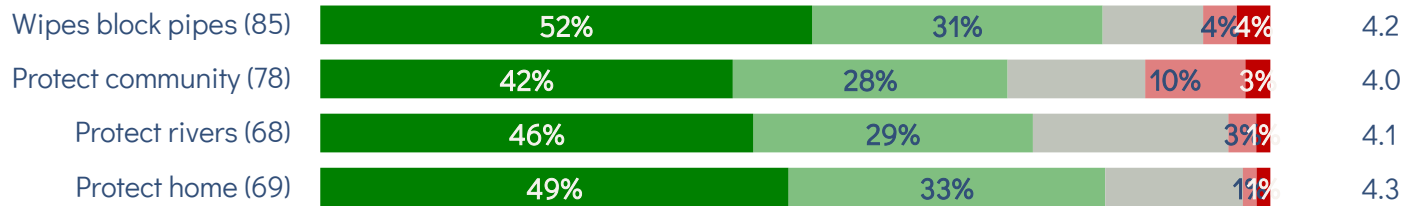


# The Wipes Block Pipes and Protect Your Home variants appear the strongest

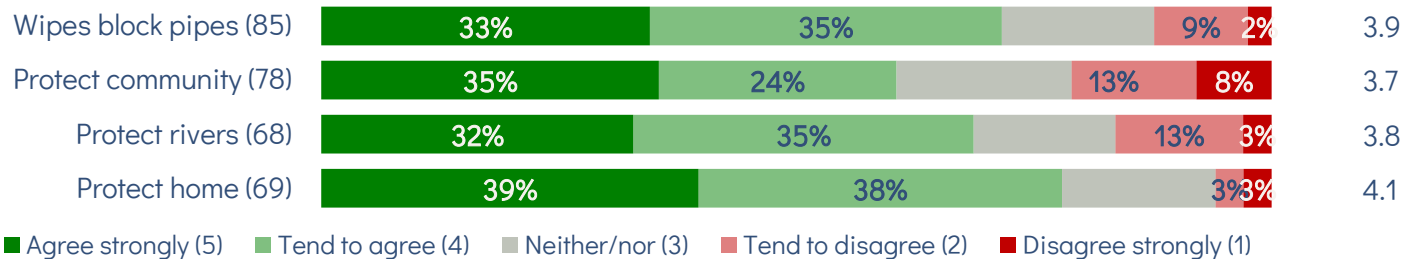
Please tell me to what extent you agree or disagree with the following statements, about this material

*This would make me personally think twice about how I dispose of wipes*

Mean score 5-1



*The campaign message is powerful enough to encourage people to change their behaviour*



■ Agree strongly (5) ■ Tend to agree (4) ■ Neither/nor (3) ■ Tend to disagree (2) ■ Disagree strongly (1)

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## The campaign designs generally resonate strongly

*How do you think this campaign could be improved? (open)*

	Wipes Block Pipes	Protect Community	Protect Rivers	Protect Home
Base: shown this image	(85)	(78)	(68)	(69)
Nothing/it can't	24%	28%	16%	23%
More coverage/wider publicity	8%	13%	10%	12%
Images of the impact/damage caused	6%	4%	7%	7%
Clearer/more focused message	4%	10%	3%	3%
Better imagery	1%	3%	12%	1%
Images of blocked pipes/sewers	5%	1%	4%	4%
Fines for offenders	4%	1%	4%	4%
Explain financial implications	5%	1%	3%	4%
Make it stronger/more powerful	5%	1%	3%	4%
Brighter/more colourful/more eye-catching	2%	3%	6%	1%
More information	2%	1%	6%	3%



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## Blockages – this wave vs last (NW only)

		Qtr 2 '20	2019	Difference
Wipes used	Any	76%	44%	+32%
	Cleaning	50%	21%	+29%
	Hygiene	35%	14%	+21%
	Make-up	25%	24%	+1%
	Baby	24%	16%	+8%
Wipes flushed	Any	8%	11%	-3%
	Cleaning	1%	-	+1%
	Hygiene	5%	11%	-6%
	Make-up	-	-	=
	Baby	1%	-	+1%

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## Blockages – this wave vs last

	Qtr 2 '20	2019	Difference
Agree it can cost me money to clear blockages if it's my responsibility	87%	92%	-5%
Agree it can cause internal sewer flooding in my home	85%	97%	-12%
Agree it can be damaging to the environment	90%	96%	-6%
Agree it can increase the cost of our water rates	80%	94%	-14%
Recall wet wipes block pipes	18%	-	+18%
Recall protect your community	5%	-	+5%
Recall protect our rivers	10%	-	+10%
Recall protect your home	10%	-	+10%

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## Blockages – this wave vs last

		Qtr 2 '20	2019	Difference
Agree it would make me personally think twice about how I dispose of wipes	Wet wipes block pipes	83%	40%	+43%
	Protect your community	70%	35%	+35%
	Protect our rivers	75%	55%	+20%
	Protect your home	82%	75%	+7%
Agree the campaign material is powerful enough to encourage people to change their behaviour	Wet wipes block pipes	68%	30%	+38%
	Protect your community	59%	35%	+24%
	Recall protect our rivers	67%	65%	+2%
	Recall protect your home	77%	80%	-3%



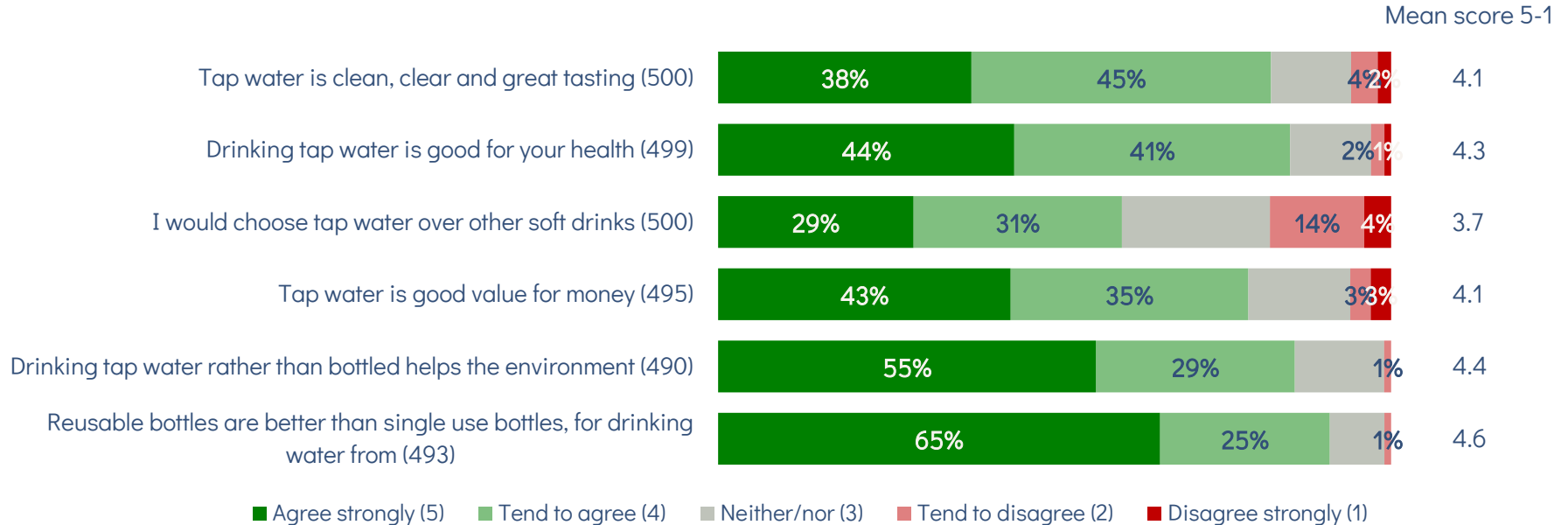
Reuse Refill Repeat

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## The benefits of tap water are widely recognised

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



Clean clear and great tasting, and tap water good for health – higher in NW than ESW  
All except good value for money – higher among socio AB



## Recall of refillable bottle messaging is fairly low

*Have you seen, heard or read anything from Northumbrian Water / Essex & Suffolk Water about using refillable water bottles?*

Heard or seen anything

		vs last wave:
<b>Total</b>	6%	-7%
<b>NW</b>	6%	-8%
<b>ESW</b>	6%	-3%

*What do you recall seeing or hearing?*

	Nos.	Total	NW	ESW
Free bottle refills (at shops/concerts etc)		8	8	-
Recommending using refillable bottles		3	2	1

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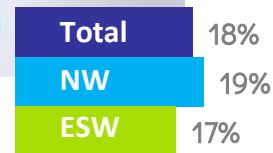
## The realistic concept imagery beats the abstract version by some way

Here are two examples of the campaign materials. Note that at this stage, these are concepts, and the text at the bottom has not been finalised. Which of these two concepts do you prefer?



- More realistic (34%)
- Clearer (18%)
- Variety of bottles (17%)
- More eye-catching (12%)
- Better imagery (8%)
- Looks better/more appealing (7%)

*Why do you prefer that one?*



- More eye-catching (22%)
- Clearer (15%)
- Looks better/more appealing (14%)
- Better imagery (11%)
- More powerful (8%)
- Bottles look reusable (8%)
- Better colours (8%)



# Those who prefer the realistic design are also rather stronger in their positive reactions

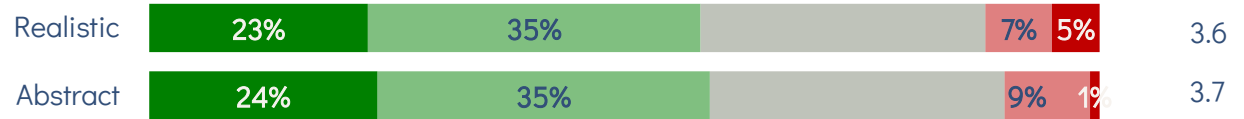
Please tell me to what extent you agree or disagree with the following statements, about this material:

## The message is clear

Mean score 5-1



## It would prompt me to find out more



## The imagery used reflects the key message



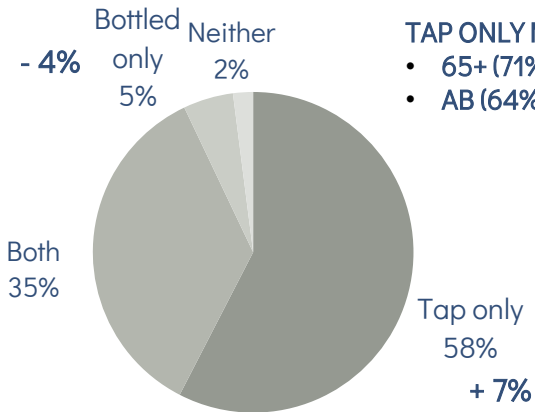
■ Agree strongly (5) ■ Tend to agree (4) ■ Neither/nor (3) ■ Tend to disagree (2) ■ Disagree strongly (1)





# Increases in preference for tap water and ownership of reusable bottles

What type or types of water do you usually drink?



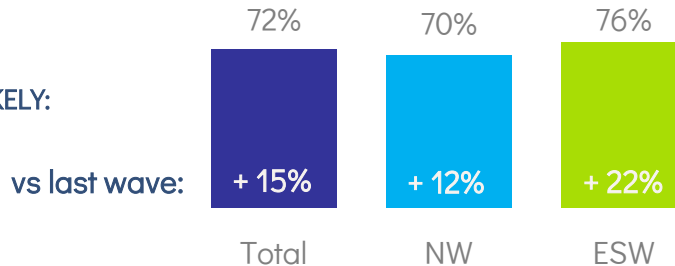
**TAP ONLY MOST LIKELY:**

- 65+ (71%)
- AB (64%)

Base: all respondents (500)

Asked whether they prefer to drink tap water or bottled mineral water, 60% prefer tap water (+5% vs last wave), 20% bottled (+2%), and the remaining 20% have no preference. Most likely to prefer tap water are socio ABs (70%)

Do you own a reusable bottle?

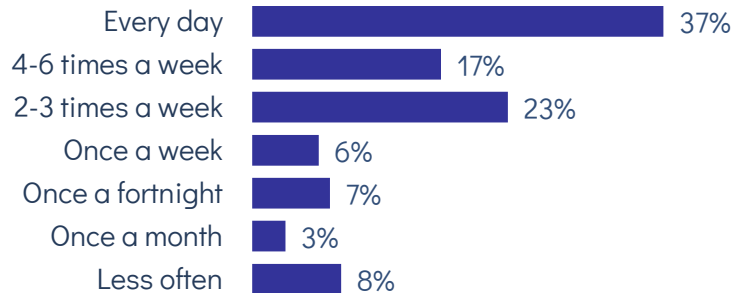


Base: all respondents (500)

**MOST LIKELY:**

- Women (78%)
- 18-44 (81%)

If so, how often do you use it?



Base: own a reusable bottle (360)

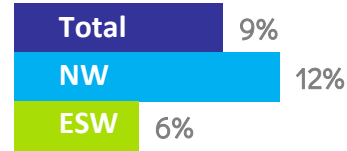


## The Refill logo is recognised more in the North East

*Do you recall seeing this logo anywhere?*



Seen anywhere



*Where have you seen it?*

	Nos.	Total	NW	ESW
Local business/shop windows		11	8	3
Use the Refill app		4	4	-
Water filling stations		4	4	-
On a bottle		3	2	1



Over 1 in 10 would know how to find a refill station – meaning nearly 9 in 10 would not

*Would you know how to find a water bottle refill station if you wanted one?*

		vs last wave:	
Would know	<b>Total</b>	12%	-3%
	<b>NW</b>	12%	-4%
	<b>ESW</b>	12%	=

*How would you do this?*

	Nos.	Total	NW	ESW
Online search		23	13	10
The Refill app		12	7	5
Already know/use		7	6	1
Look for signs/logo in windows		4	2	2
NWG website		4	4	-
Ask in shops/cafes		3	-	3

**A**

## Reuse Refill Repeat – this wave vs last

	Qtr 2 '20	2019	Difference
Agree tap water is clean, clear and great tasting	83%	78%	+5%
Agree drinking tap water is good for your health	85%	79%	+6%
Agree I would choose tap water over other soft drinks	60%	61%	-1%
Agree tap water is good value for money	78%	85%	-7%
Agree drinking tap water rather than bottled helps the environment	84%	93%	-9%
Reusable bottles are better than single use bottles, for drinking water from	90%	96%	-6%
Recall seeing Refill logo (Total)	9%	7%	+2%
Would know how to find a refill water station if wanted one (Total)	12%	15%	-3%



# Leakage

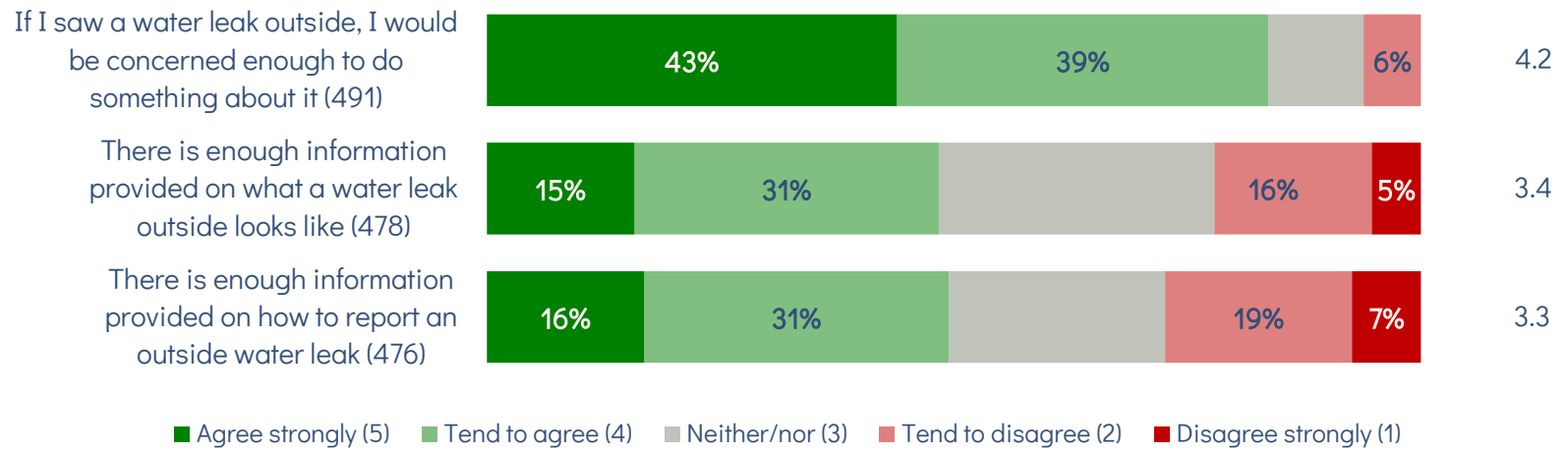




# Many would be concerned enough to report a leak, but fewer feel there is enough information on leaks and reporting them

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

Mean score 5-1



Would be concerned enough to do something – higher among 55+ and socio AB

A

A little over half would think of reporting a leak to their water company, but it may well depend on the visible nature of the leak

*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 (52%)
- Report it - where, not specified (13%)
- Nothing/ignore it (10%)
- Call the council (9%)
- Google who to inform (5%)
- Would depend on size/location (3%)
  
- Don't know (4%)

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



74%



93%



26%



## Recall of any messaging on what to do if they see a leak is limited

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

			vs last wave:
Seen or heard anything	<b>Total</b>	8%	+3%
	<b>NW</b>	8%	+4%
	<b>ESW</b>	9%	+2%

*What do you recall seeing or hearing?*

	Nos.	Total	NW	ESW
Information on website		7	4	3
Advice/contact numbers		6	4	2
Info in with the bill		5	1	4
Signage on vans		3	2	1
To report it		3	3	-





## The majority would think to report a leak by phone

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

	Total	NW	ESW
Phone	69%	70%	67%
Via the website	22%	21%	24%
Email	4%	4%	5%
Look on website for advice	4%	5%	3%
Consult Google	2%	2%	3%

A

## Leakage – this wave vs last

	Qtr 2 '20	2019	Difference
Agree if I saw a water leak outside, I would be concerned enough to do something about it	82%	85%	-3%
Agree there is enough information provided on what a water leak outside looks like	46%	42%	+4%
Agree there is enough information provided on how to report an outside water leak	47%	41%	+6%
Would report it to water company if they saw a water leak on the road, path or in a public area	52%	66%	-14%
Would report a steady flow	74%	85%	-11%
Would report a gush	93%	89%	+4%
Would report a puddle	26%	36%	-10%
Would report a leak by phone	69%	83%	-14%
Would report a leak via the website	22%	10%	+12%
Would report a leak via by email	4%	11%	-7%



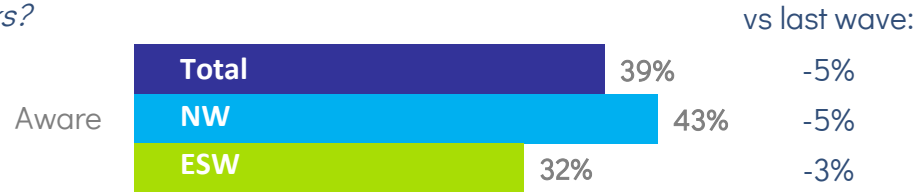
# Waterside Parks

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## Nearly two fifths are aware of the 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, Hanningfield and Kielder Waterside Parks?*



### **MOST LIKELY:**

- Men (44%)
- 55+ (48%)
- AB (54%)

*How did you hear about these Parks?*

	Total	NW	ESW
Word of mouth	20%	23%	16%
Internet search	7%	7%	6%
Previously visited	5%	6%	5%
Newcastle Chronicle	3%	5%	1%
Facebook	3%	4%	3%



# 15% have visited a Waterside Park in the last year

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

			vs last wave:	
Visited	<b>Total</b>	15%	-1%	<b>MOST LIKELY:</b> • AB (22%)
	<b>NW</b>	15%	-2%	
	<b>ESW</b>	15%	+2%	

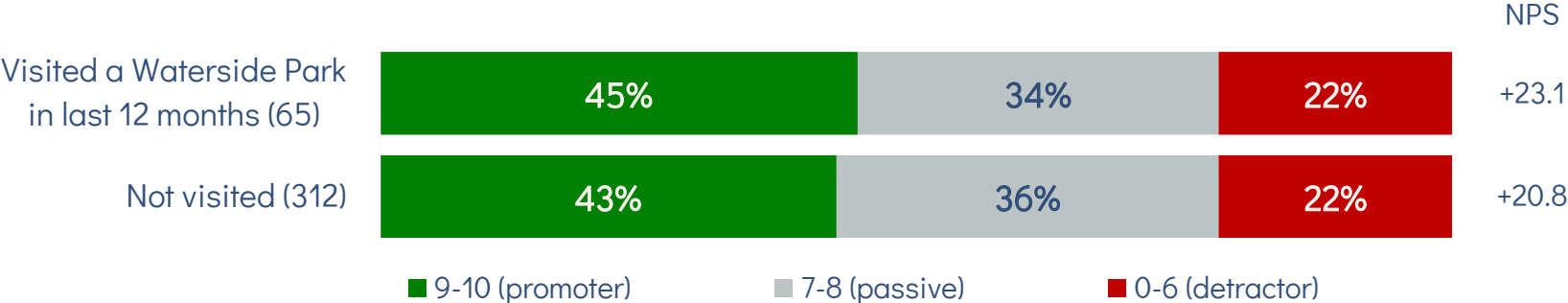
*Which one(s)?*

	Total	NW	ESW
Kielder	6%	11%	-
Hanningfield	5%	1%	12%
Derwent	4%	7%	1%
Fontburn	2%	2%	1%



# 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'*



Base: all respondents, where answer given (as shown)

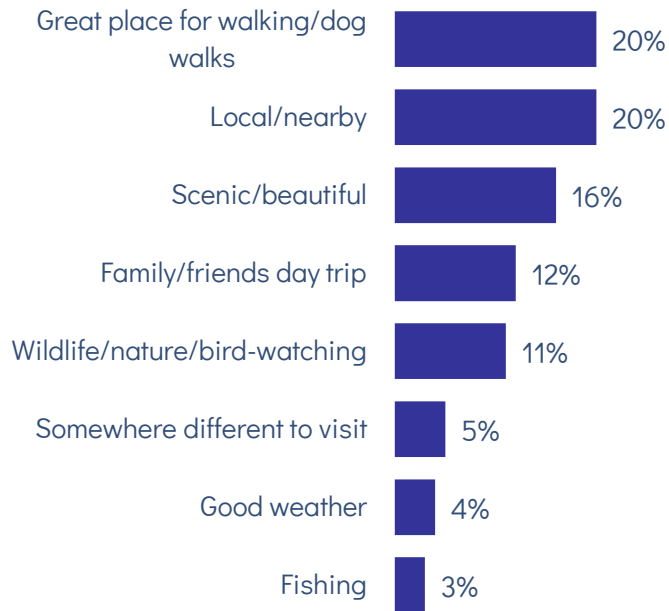
**Marginally higher among visitors, but the difference is not statistically significant**

However, visitors are more likely to give a likelihood to recommend score at all (88%) than non-visitors (73%) – this may indicate a greater degree of engagement with the brand among visitors



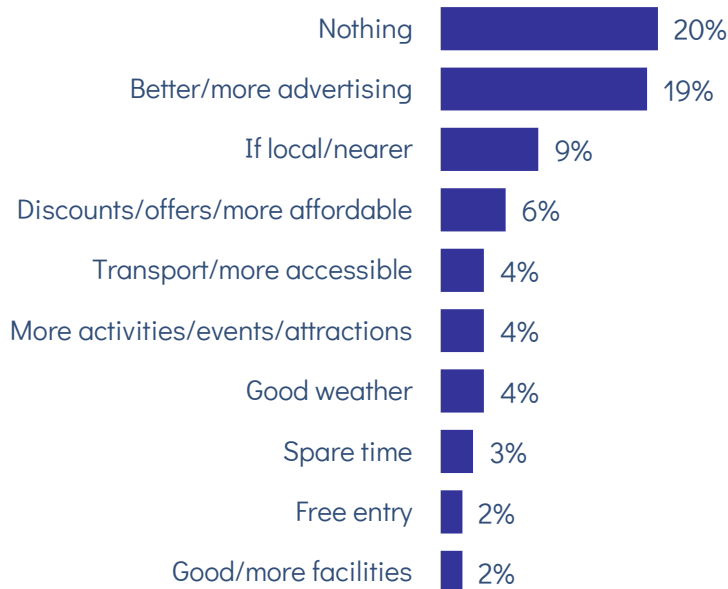
## Motivations for visiting Waterside Parks

*What in particular encouraged you to visit? (open)*



Base: visited Waterside Park in last 12 months (74)

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



Base: not visited a Waterside Park in last 12 months (426)



Website

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## Apparent increase in consumers having visited the website \*

\* The difference may be down to survey methodology – this wave was done online, which may pick up a higher proportion of regular internet users

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



**MOST LIKELY:**

- AB (52%)

What were you looking for?

	Total	NW	ESW
Query my bill	36%	35%	36%
Pay a bill	10%	10%	11%
General information/advice	10%	10%	11%
For contact numbers	8%	10%	5%
About water saving advice/devices	7%	6%	8%
About water meters	7%	8%	5%
About moving house	3%	3%	4%
About rates/charges	3%	3%	4%
About direct debits	3%	3%	2%

Base: visited website (230)

Can you think of a reason you might ever visit the website?

	Total	NW	ESW
Nothing	35%	36%	34%
Help/advice/general information	15%	14%	17%
Bills/account query	12%	8%	17%
To report a problem	10%	9%	10%
To find contact numbers	9%	10%	9%
To report a leak	7%	7%	8%
Loss of supply	6%	7%	3%
For local works information	4%	6%	2%
For pricing information	4%	6%	2%

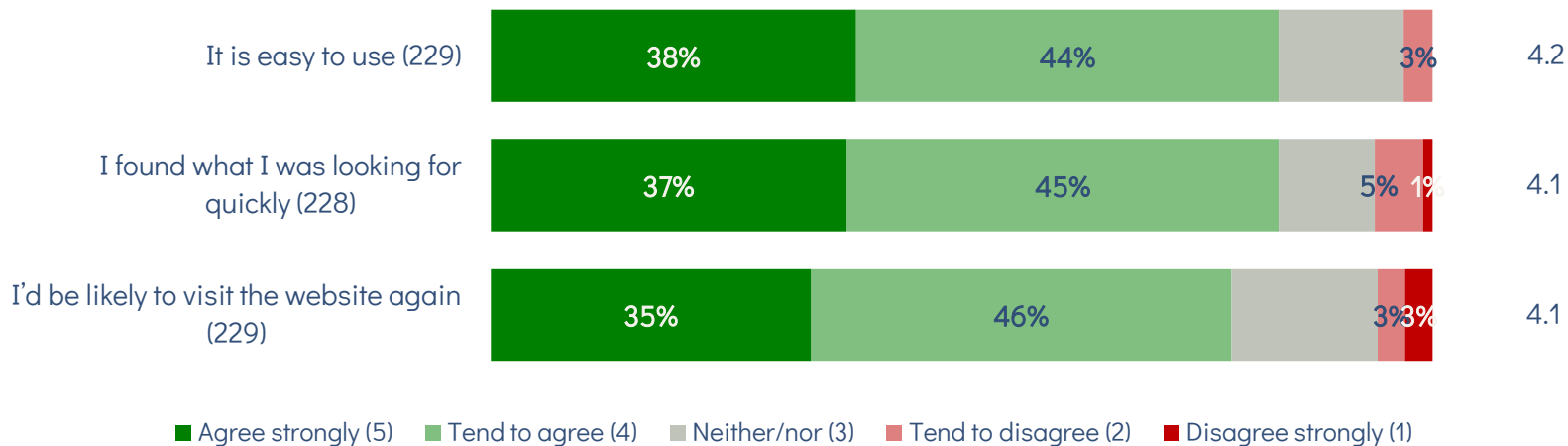
Base: not visited website (270)



## The website scores well on ease of use

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

Mean score 5-1



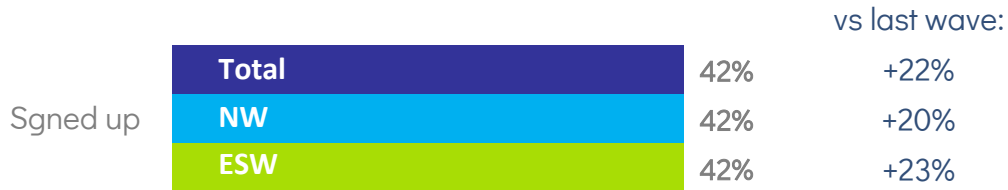
All higher among women and 18-34's



# E-billing sign-up appears to have increased significantly \*

\* The difference may be down to survey methodology – this wave was done online, which may pick up a higher proportion of regular internet users

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



- MOST LIKELY:**
- 18-34 (50%)
  - AB (47%)

Base: all respondents (500)

*What might encourage you to sign up to e-billing?*

	Total	NW	ESW
Discounts/cheaper bills/ incentives	36%	34%	39%
Nothing	21%	20%	22%
If invited/made aware	8%	8%	8%
More information/instructions	6%	7%	4%
Prefer paper bills	5%	4%	7%

Base: not signed up (230)

**A**

## Website – this wave vs last

	Qtr 2 '20	2019	Difference
Agree it is easy to use	82%	91%	-9%
Agree I found what I was looking for quickly	82%	91%	-9%
Agree I'd be likely to visit the website again	81%	82%	-1%



# Priority Services

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**A**

## Awareness of Priority Services support is one fifth, although the Water Without Worry campaign achieves lower recall

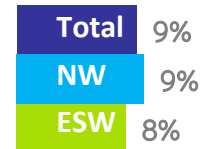
*Have you seen, heard or read anything from Northumbrian Water / Essex & Suffolk Water about how they can help people who may be struggling to pay their household bills?*

Seen or heard anything



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

Seen or heard anything



*Where have you seen or heard about this?*

	Nos.	Total	NW	ESW
On their website		15	8	7
Information in with bills		9	6	3
Social media		8	4	4
In a magazine		7	6	1
TV		6	5	1
Poster on bus shelter		5	4	1

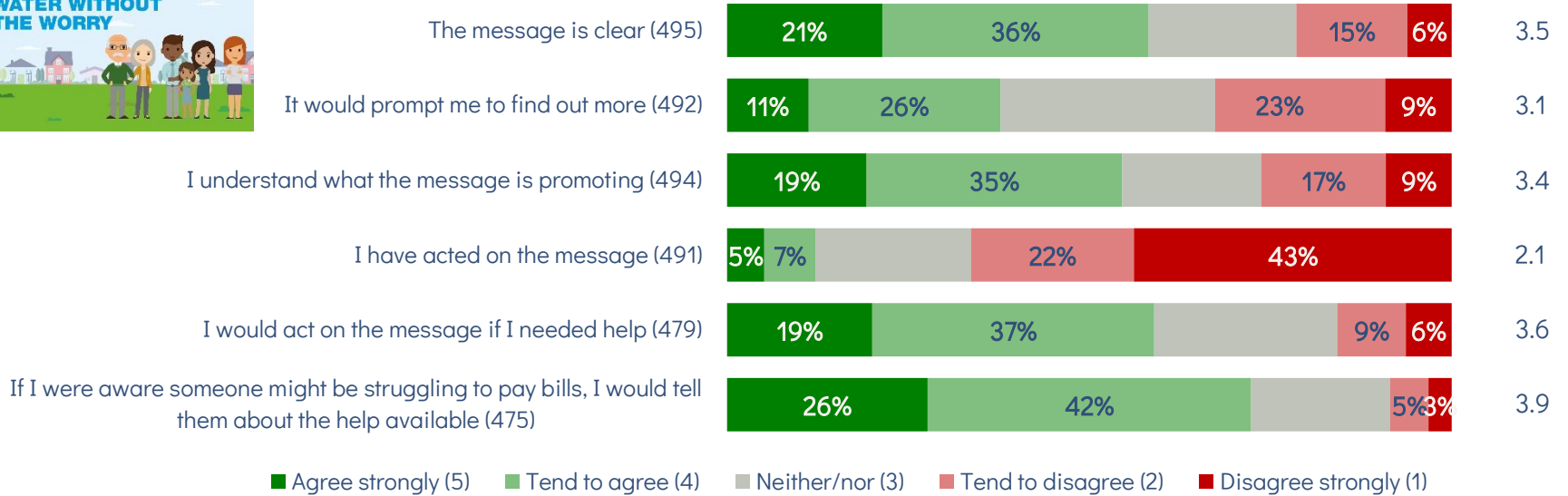


# The campaign, without any further messaging or call to action, is not clear

To what extent do you agree or disagree with the following statements, about this material:



Mean score 5-1



All higher among women and 18-34s



DEFINING THE **CLEAREST** DIRECTION

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THANK YOU

**NWG**  
*living water*

All of our work is carried out in accordance with the requirements of the international quality standard specific to the market research industry, ISO 20252

