



09 / 07 / 21

# Campaign awareness omnibus

## Results: Qtr2 2021

Our ref. 8159.1



DEFINING THE **CLEAREST** DIRECTION

---

A

## The survey

---

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, 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

A

## Approach

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

500 interviews:

300 North; 150 Essex;  
50 Suffolk

Fieldwork carried out:

25 May – 14 June '21

Average interview length:

13.5 minutes



# Demographics

---

**A**

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%	25%	23%
35-44	14%	15%	13%
45-54	17%	17%	18%
55-64	18%	17%	18%
65+	27%	25%	31%
AB	28%	26%	30%
C1/C2	46%	46%	44%
DE	27%	28%	26%



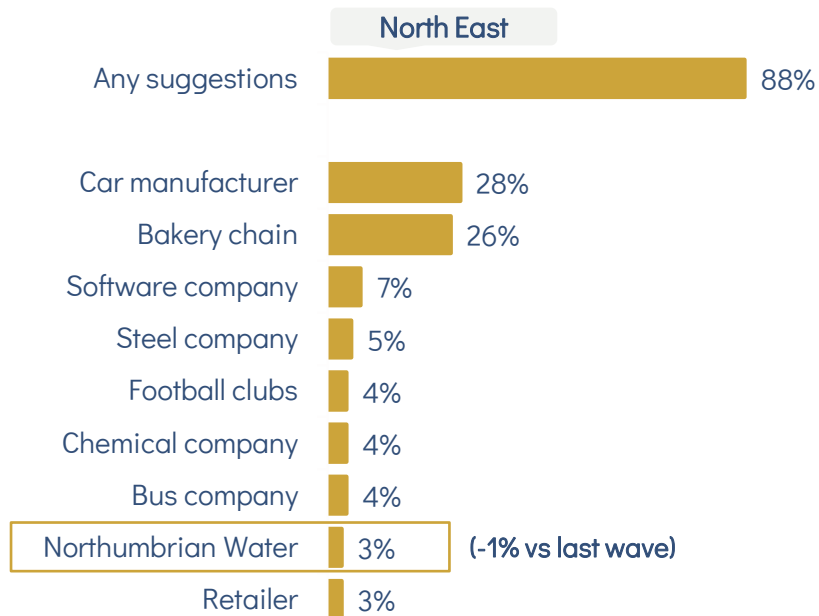
Brand



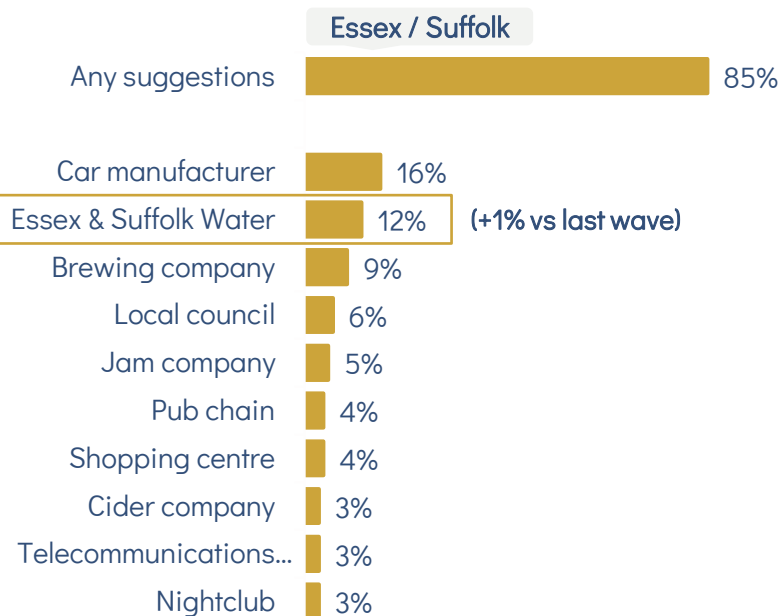
A

## Companies associated with each area

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



Base: all respondents (300)

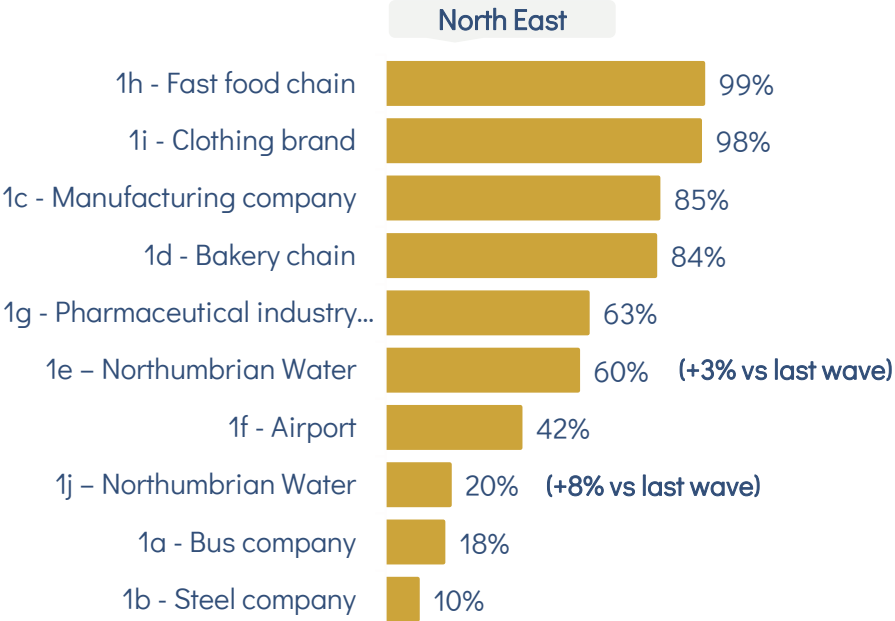


Base: all respondents (200)



# Recognition of the 'living water' part of the company's logo is stronger in NW than that of the blue and green cross shape

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

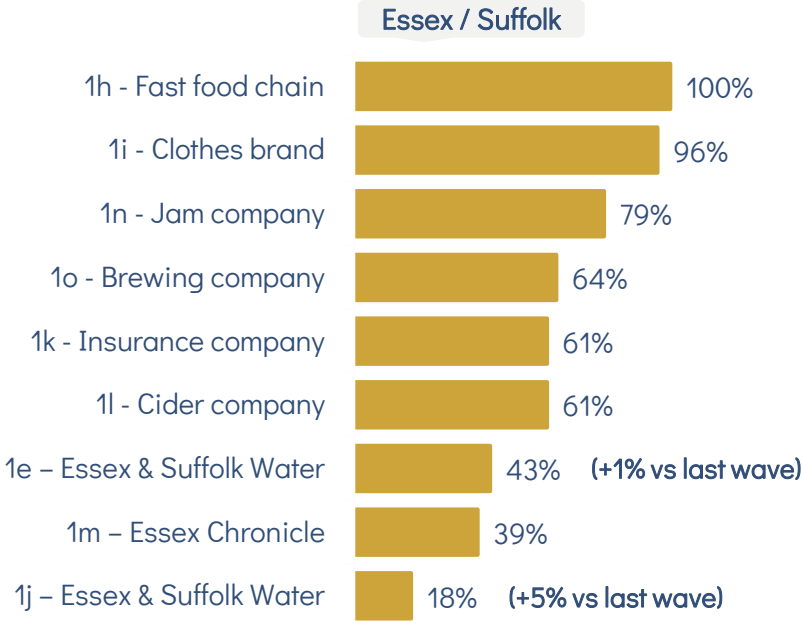






Again , 'living water' recognition is higher than the blue and green cross shape in the ESW region too

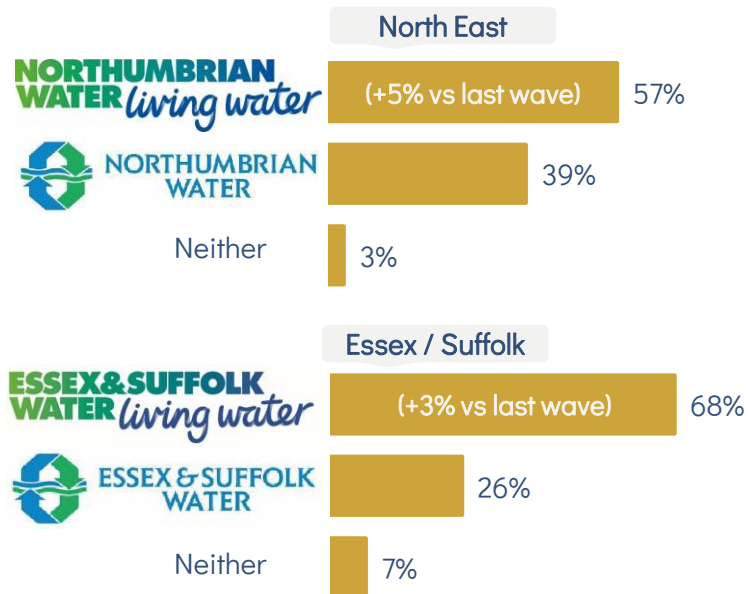
*Which of these logos, if any, do you recognise?*



A

## 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

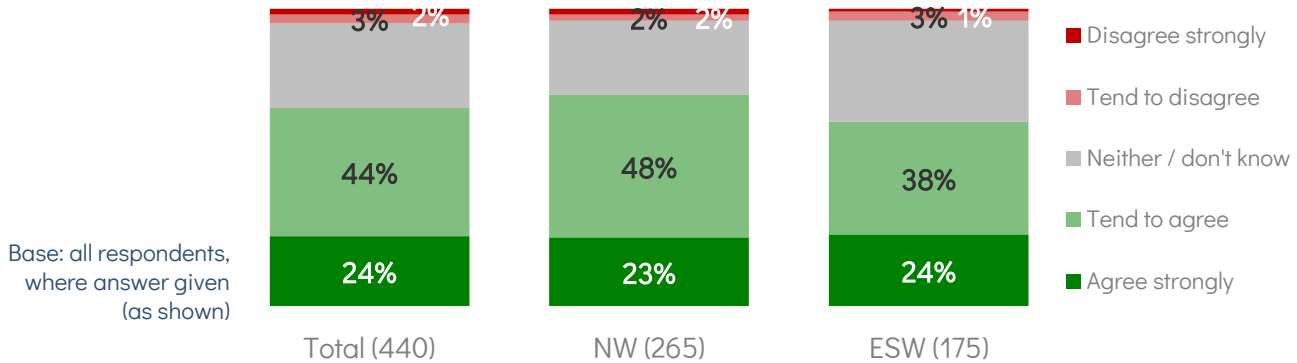
	<b>NORTHUMBRIAN WATER</b> living water	<b>ESSEX &amp; SUFFOLK WATER</b> living water
Base: all respondents	(300)	(200)
Nothing/don't know	25%	23%
Neutral/indifferent	16%	14%
OK	12%	12%
Good design/like it	4%	10%
Safe/reassured	5%	8%
Happy	4%	4%
Good/great	5%	2%
Calm/relaxed	2%	4%
Modern company	1%	4%
Positive/inspired	2%	2%



# 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 18-34s**  
**Also higher among those who recall having seen any NWG campaigns/messaging**

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

*If agree, why?(top mentions)*

Good company/do a good job	17%
Good service	13%
Had no problems	12%
Trustworthy	9%
Good reputation	6%
Quality/safe water	6%
Have good experience of them	6%

Good/fair price	4%
Care about customers	4%
Good communication	4%
Do repairs/respond to problems	4%
Reliable service/no interruptions	4%

Base: agree (296)

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

Don't know enough to comment	52%
Expensive	12%
Nothing to compare them with	10%
Only interested in profits	8%

Base: disagree/neither (144)



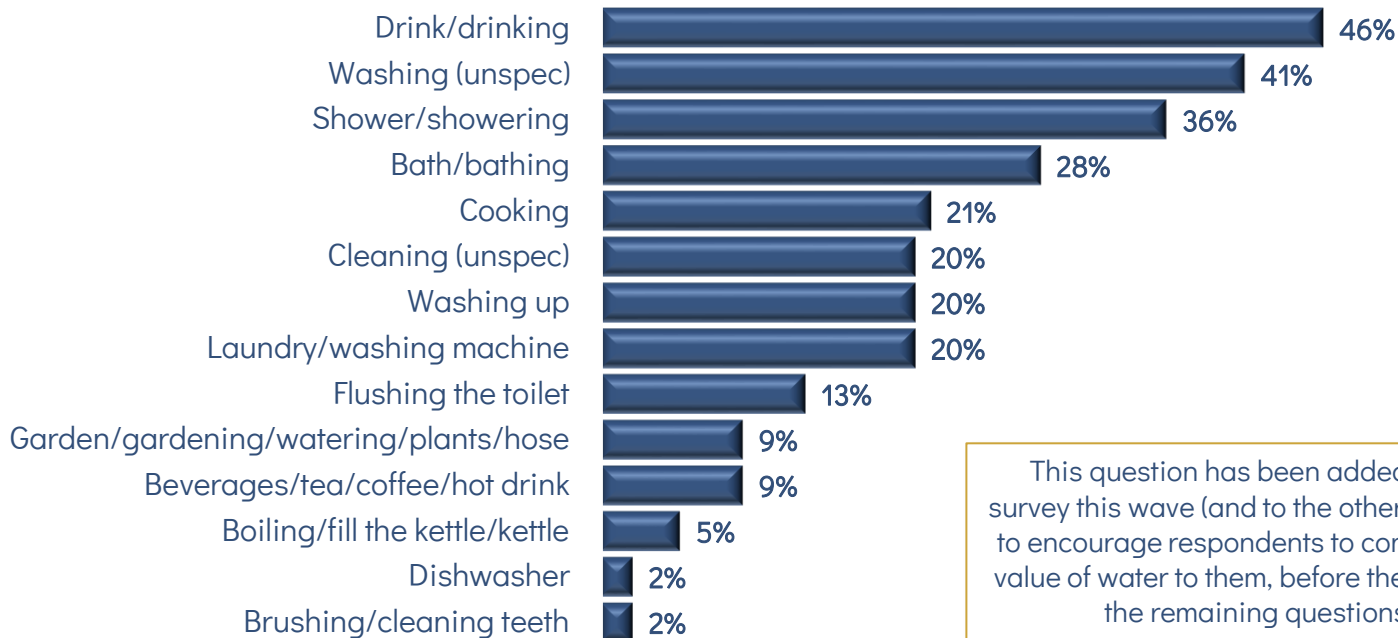
# Value of water



A

Drinking is one of the first things that come to consumers' minds, when thinking about using water at home

*What are the first 3 things that come to mind, if I ask you what you use water for at home? (unprompted)*



This question has been added to the survey this wave (and to the other trackers), to encourage respondents to consider the value of water to them, before they answer the remaining questions



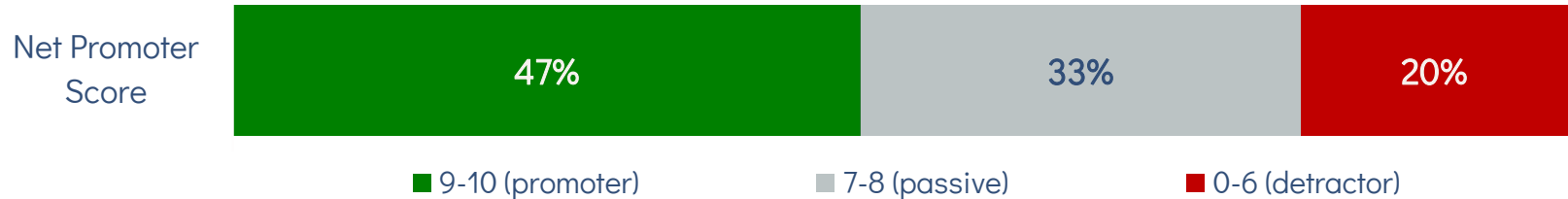
# Key metrics





## 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 (368)

As many as 26% overall (and 34% in Suffolk and 33% of the DE socio group) felt unable to give a score.

**NPS: +27.2**  
**(+1.4 vs. last wave)**

Higher among women, 18-34s and socio C1  
Also higher among those who recall having seen any NWG messaging or campaign materials (+40.7) and people who have visited a leisure site (+58.8)

**A**

## Top reasons for NPS scores

### Promoters (scores of 9-10) – 174 respondents

- No problems (33%)
- Good company/do a good job (21%)
- Good customer service (16%)
- Reliable/trustworthy (8%)
- Good water quality (7%)
- Good value/fair price (6%)
- Good experience with them (5%)
- Efficient (3%)
- No supply problems (3%)
- Quick response (3%)
- Easy to deal with (2%)
- Been with them for years (2%)
- Good communication (2%)
- Good reputation (2%)
- Innovative (2%)

### Passives (scores of 7-8) – 120 respondents

- No problems (29%)
- Good company/do a good job (9%)
- Good customer service (9%)
- Expensive (9%)
- Reliable/trustworthy (7%)
- Always room for improvement (5%)
- Good/fair price (4%)
- Good water quality (3%)
- Local/my water company (3%)
- Good experience with them (3%)
- Efficient (3%)
- Good reputation (3%)
- OK/fine (10%)
- Nothing to compare against/no choice/had no real dealings with them (8%)

### Detractors (scores of 0-6) – 74 respondents

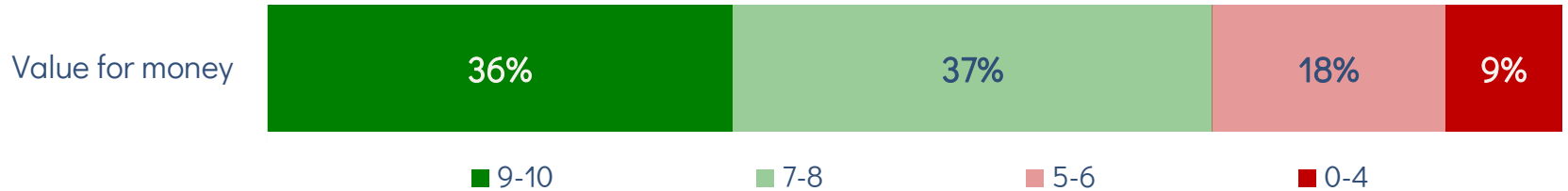
- Expensive (19%)
- No better or worse/just a water company (12%)
- Neutral/indifferent (8%)
- Poor water quality (5%)
- Only interested in profit (4%)
- Don't recommend anyone/no-one to recommend to (4%)
- Okay/fine (3%)
- No problems (3%)
- Nothing to compare against/no choice/had no real dealings with them (14%)





## 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 (411)

A majority were able to give an answer here, although 18% overall (and as many as 28% of customers in Suffolk and 27% of DEs) felt they did not have enough knowledge to give a score.

**Mean score: 7.5**  
(+0.1 vs. last wave)

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

**Also higher among those who recall having seen any NWG messaging or campaign materials (7.9 vs 6.8 of those who do not)**

A

## 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 (61%)
- Good/reliable service (11%)
- Too expensive (9%)
- Good quality water (9%)
- Reliable supply/no supply problems (4%)
- Only paying for what you use (measured) (3%)
- Improving/investing in infrastructure (2%)
  
- Have no choice/nothing to compare against (2%)



# Unprompted campaign awareness

---



## Around 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?*



- MOST LIKELY:**
- AB (24%)
  - 18-34 (26%)

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

	Nos.	Total	NW	ESW
About work being done		11	9	2
Environmental information - cleaning rivers etc		8	6	2
Improving/expanding their service/future plans		8	6	2
Seen their cars/vans		7	3	4
Water saving advice/devices		4	2	2
Information about sewers/sewerage		4	3	1
Dwaine Pipe/blocked drains/what not to flush		3	3	-
TV advertising/radio advertising		3	1	2



Just Add Water

---

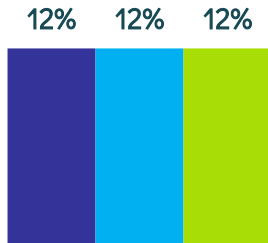
A →

The two Just Add Water ads perform similarly in terms of recall and together have reached more than 1 in 10 customers

*Here are some examples of Northumbrian Water / Essex & Suffolk Water campaign materials. Do you recall seeing either of these, before today? (both images shown, with 'yes'/'no' for each)*

■ Total ■ NW ■ ESW

vs last wave: +2% +1% +4%



Seen this before (either image)

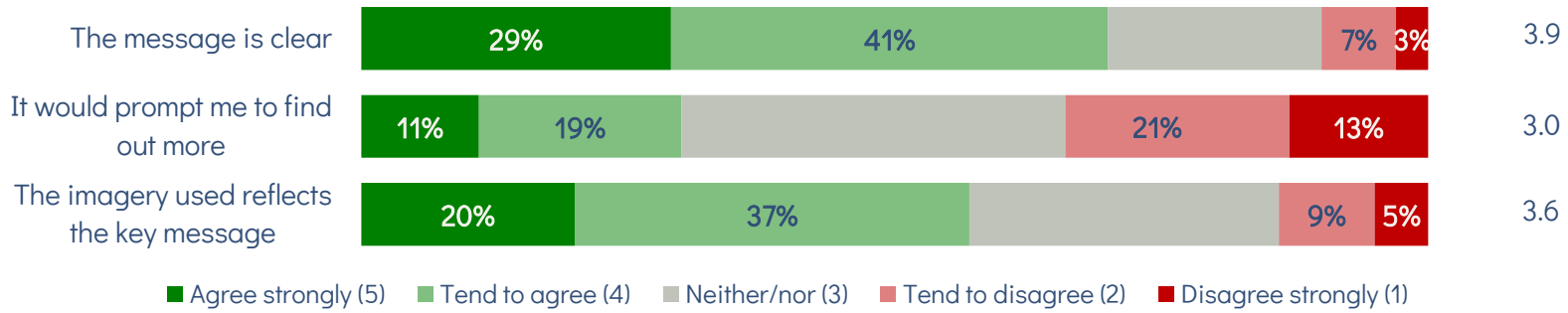




# The great majority feel the message conveyed by the ads is clear

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

Mean score 5-1



Women and 18-34s are most likely to agree with each statement

A

On the whole, the initiative is likely to be received positively

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

	Just add water
Base: shown this image	(500)
Always there to help/support customers	19%
Reassuring/they are always there/there for you	17%
Highlights how important water is/sensible	14%
Encourages people to drink more water/stay hydrated	11%
Ways to contact/interact with the company	10%
Confusing/don't know what it means	9%
Company are easy to contact/contactable/call them	9%
For all generations/for everyone	8%
Implies water is clean and safe/quality water/fresh	5%
Implies the company really cares for their customers	5%
Reliable supply/always there	4%
Quality service/good service	2%
Helpful	2%
Helping people with financial difficulties/supply problems	2%





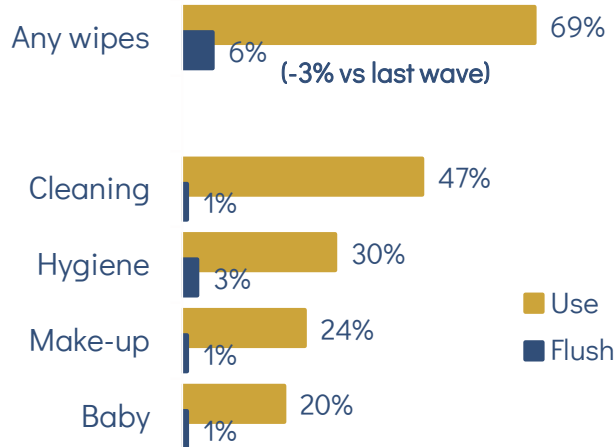
# Blockages (NE only)

---

A

Around three quarters use any type of wipes; 6% of all consumers (9% of wipes 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?*



18 consumers say they ever flush wipes. Why?

- The packaging says they are flushable (11)
- They're small enough to flush (9)
- More hygienic than putting in a bin (6)
- They're just like toilet paper (5)
- No bathroom bin (5)
- Ease/convenience (2)
- Not aware of any reason not to (1)

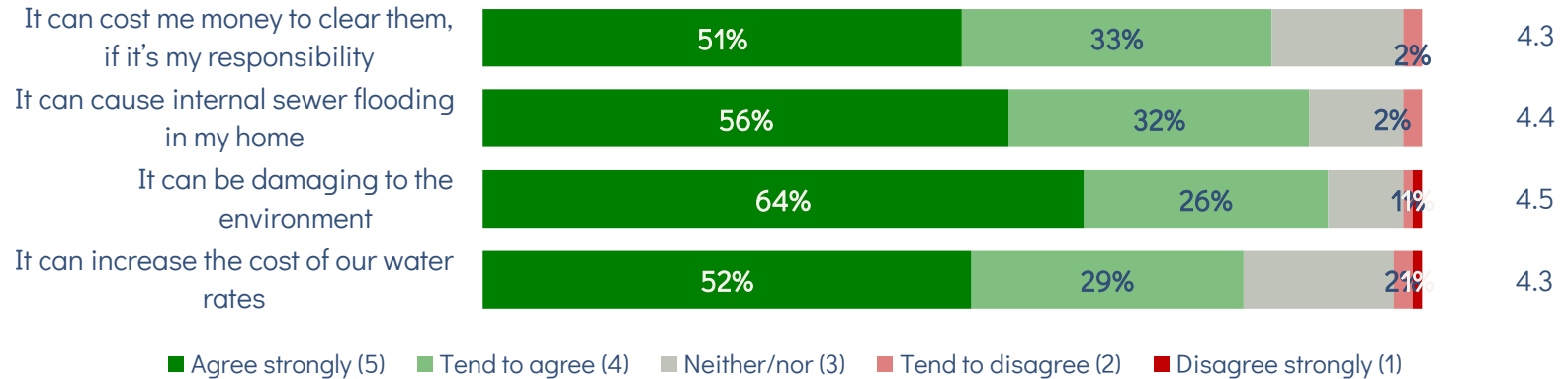


## The vast majority understand the potential impact of flushing wipes

Are you aware that flushing wipes can cause blockages? **97%** vs last wave: +1%

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 be damaging to the environment – higher among women and socio C1  
Agreement with all statements higher among those who recall any NW campaign messaging



## Over two fifths 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?* **42%**

vs last wave:  
+6%

*What do you recall seeing or hearing?*

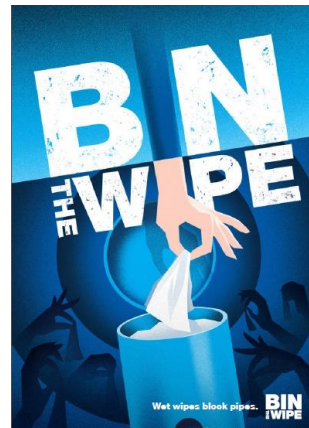
Don't flush wipes down the toilet/bin the wipe	10%
Dwayne Pipe/Only pee and poo go down the loo	8%
TV/radio/newspaper/magazine adverts	6%
Advert (unspec)	4%
What not to flush down the loo/what can be flushed	3%
Adverts on their vans	2%
Damage/cost of flushing inappropriate materials	2%
TV programme	1%
Blockages to drains/pipes etc	1%
Leaflet - no more spec.	1%
TV/radio - no more spec.	1%
Letter/something through the post	1%
Advert on a bus/train/bus stop sign	1%
Posters/billboards	1%
On their website	1%
With my bill	1%

A →

Over a third have seen any of these posters  
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? (all images shown, with 'yes'/'no' for each)*

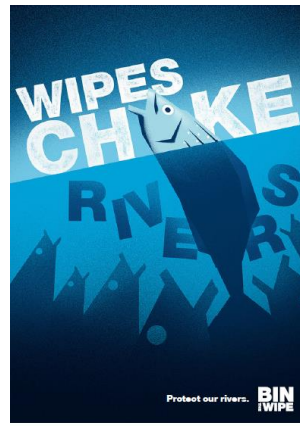
36% (any images)



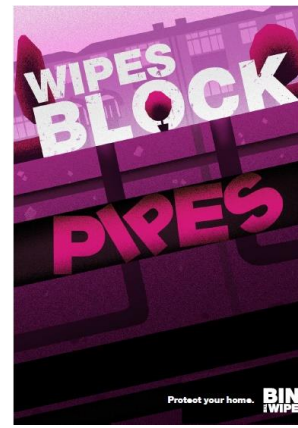
30%



11%



11%



13%



14%



9%

A

## The campaign designs generally resonate strongly

*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	36%	12%	20%	38%	26%	12%
Easy to understand/clear/straight to the point	20%	6%	8%	14%	12%	14%
Impact on the environment/wildlife etc.	2%	-	36%	2%	2%	-
Effects of blockages/cause flooding	2%	10%	-	14%	8%	6%
Good/I like it/appealing	6%	-	4%	4%	2%	4%
Informative	4%	4%	2%	-	4%	6%
It's true/I agree	4%	2%	4%	4%	4%	2%
Scary/creepy/disturbing/alarming/worrying	2%	4%	4%	2%	4%	4%
Unclear/not an obvious message	-	4%	2%	2%	4%	4%
Colourful/bright/visually appealing/eye-catching	2%	4%	6%	2%	2%	-
Wet wipes are bad/should not produce/buy/sell them	2%	4%	4%	-	-	4%
Striking/dramatic/bold/attention-grabbing	-	8%	4%	-	2%	-
Strong message/powerful/impactful	-	2%	-	4%	4%	-
Important message/everybody should be made aware	4%	-	2%	-	2%	2%
Effective	2%	-	2%	-	6%	-
Hard to work out the letters/wording/hard to read	-	2%	4%	2%	-	-
Doesn't apply to me/I don't do this	4%	-	-	2%	2%	-
Good use of the colour red/implies danger/STOP	-	6%	-	-	-	-

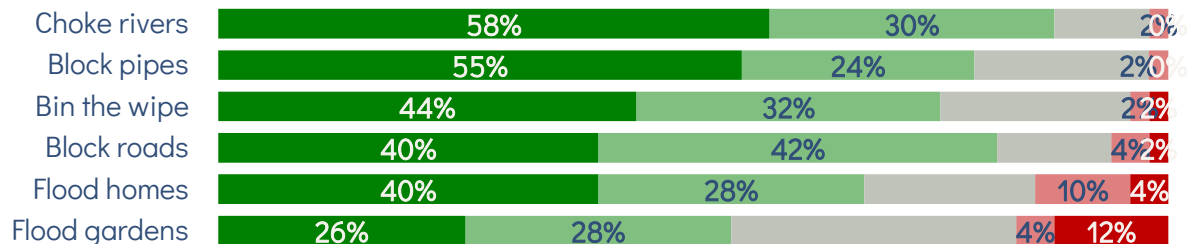
 = highest response for this design



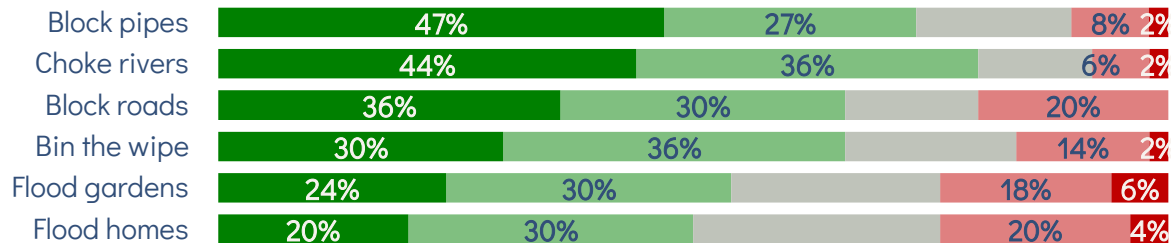
## The Wipes Choke Rivers and Wipes Block Pipes variants are the strongest in terms of potential for behaviour change

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*



*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)



## Relatively few suggestions to improve the campaign, other than coverage

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

Nothing/it can't	20%
More coverage/wider publicity	13%
Clearer/more focussed message	5%
Fines for offenders	4%
More inventive/better designed	3%
Change the colour/less colour	2%
Explain the environmental implications/impact on wildlife	2%
Make it more powerful/stronger message	2%
More information	2%
Remove/ban wet wipes from the market	2%
Start again/everything needs improving	2%
Explain the financial implications	2%
Easier to read/clearer/bigger font	2%
Give facts on damage caused/consequences	2%
Show real life images/cases	2%
Nothing, some people will continue regardless	2%





# Leakage

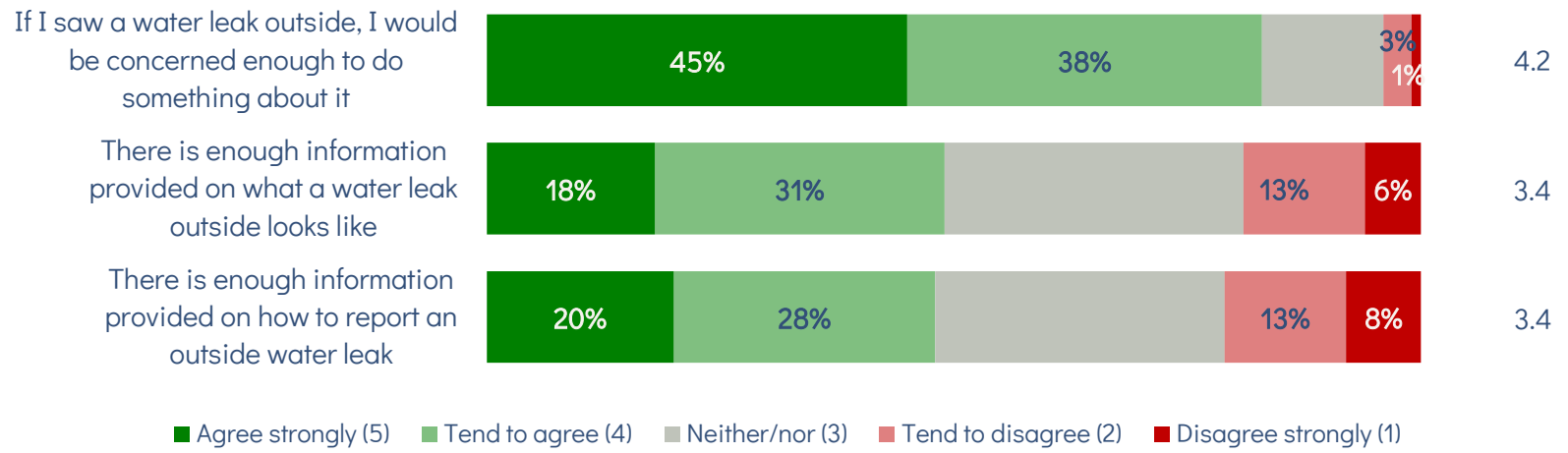




# Over 4 in 5 would be concerned enough to report a leak, but fewer feel there is enough information on leaks and reporting them

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+  
Enough information provided on what a water leak outside looks like – higher among 65+

A

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 (55%)
- Search online for who to report it to (33%)
- Report it to the council (19%)
- Nothing/ignore it (9%)
- Don't know (6%)

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



26%



85%



41%



## 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>	13%	+4%
	<b>NW</b>	13%	+4%
	<b>ESW</b>	12%	+2%

*What do you recall seeing or hearing?*

	Nos.	Total	NW	ESW
Information on website		9	6	3
TV/radio ad		7	6	1
Leaflet through the door		4	2	2
Dedicated hotline		4	4	-
Information with the bill		3	2	1
Letter in the post		2	2	-

**A**

Most would think to report a leak by phone, but email and social media increasingly feature

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

	Total	NW	ESW
Phone	59%	55%	64%
Email	23%	23%	23%
Webchat	13%	14%	11%
Twitter	4%	3%	6%
Facebook	6%	5%	7%
Look on website for how to do it	36%	36%	36%
Don't know	4%	5%	3%
Wouldn't do it	2%	2%	2%



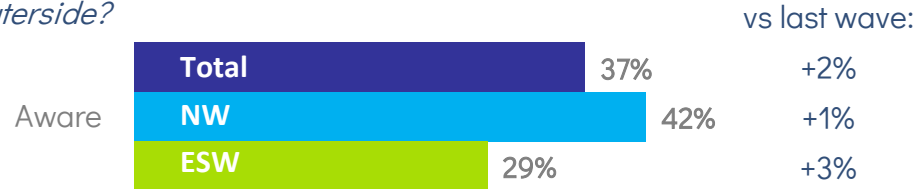
# Waterside Parks

---



## 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 and Hanningfield Waterside Parks and Kielder Waterside?*



### MOST LIKELY:

- Men (42%)
- 65+ (46%)
- AB (43%)

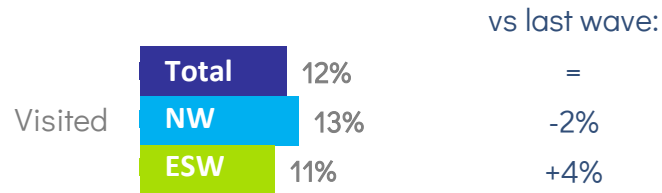
*How did you hear about these Parks?*

	Total	NW	ESW
Word of mouth	17%	21%	10%
Internet search	8%	9%	6%
Facebook	6%	5%	8%
Previously visited	4%	4%	4%
Newspaper article	4%	4%	3%
Waterside Parks UK website	3%	4%	3%
Instagram	3%	3%	3%
Twitter	3%	2%	4%
'This is Durham'	2%	3%	1%



## 12% have visited a Waterside Park in the last year

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



*Which one(s)?*

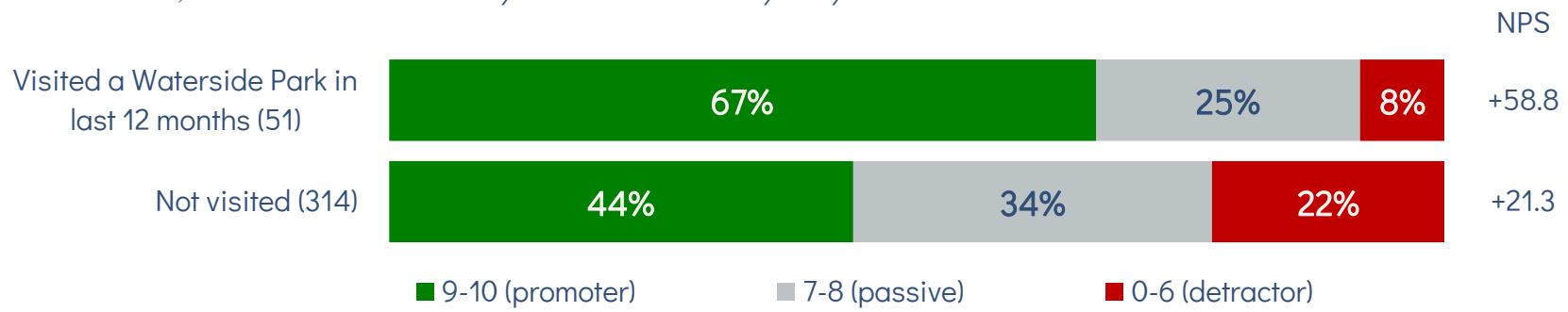
	Total	NW	ESW
Derwent	6%	8%	4%
Kielder	4%	6%	1%
Hanningfield	4%	2%	8%
Fontburn	2%	2%	3%





## 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)

**NPS among Waterside Parks visitors - 2020 total was:**  
(114 customers answering)  
**+ 35.1**

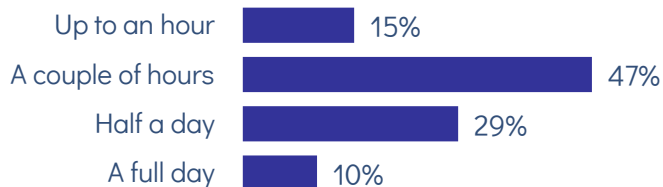
### Visitors give a significantly higher NPS score

Visitors are also rather more likely to give a likelihood to recommend score in the first place (82%) than non-visitors (73%) – this may indicate a greater degree of engagement with the brand among visitors

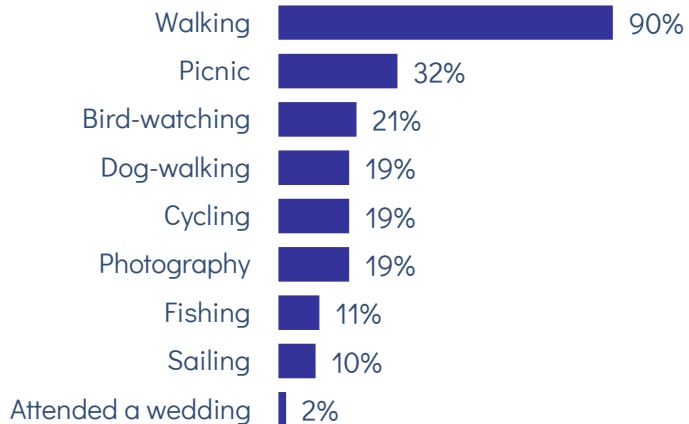
A

## 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 (62)

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



Base: not visited a Waterside Park in last 12 months (438)



# Website





## Visiting the website

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

vs last wave:



*What were you looking for?*

	Total	NW	ESW
To check your account	58%	54%	64%
To pay a bill	32%	31%	35%
To change address/moving house	16%	16%	15%
To set up / change/cancel a direct debit	15%	12%	19%
For information on, or to get, a water meter	13%	16%	7%
To register for e-billing	12%	10%	15%
To find a contact number/email address	10%	10%	10%
For information on water saving, or to get a water saving device	9%	10%	7%
For information on works being carried out	9%	11%	6%
To report a leak	8%	6%	10%
To report a water supply/quality issue	8%	6%	10%
For information on prices/tariffs	7%	6%	7%
To download the app	5%	5%	6%
For information on their leisure sites	4%	4%	5%

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

	Total	NW	ESW
Nothing	37%	38%	36%
To report a leak	11%	13%	9%
Help/advice/general information	11%	10%	12%
Bills/account query	9%	10%	9%
Loss of supply	8%	9%	6%
To find contact numbers	5%	7%	3%
To report a problem	5%	3%	6%
To pay a bill	2%	1%	3%

Base: visited website (238)

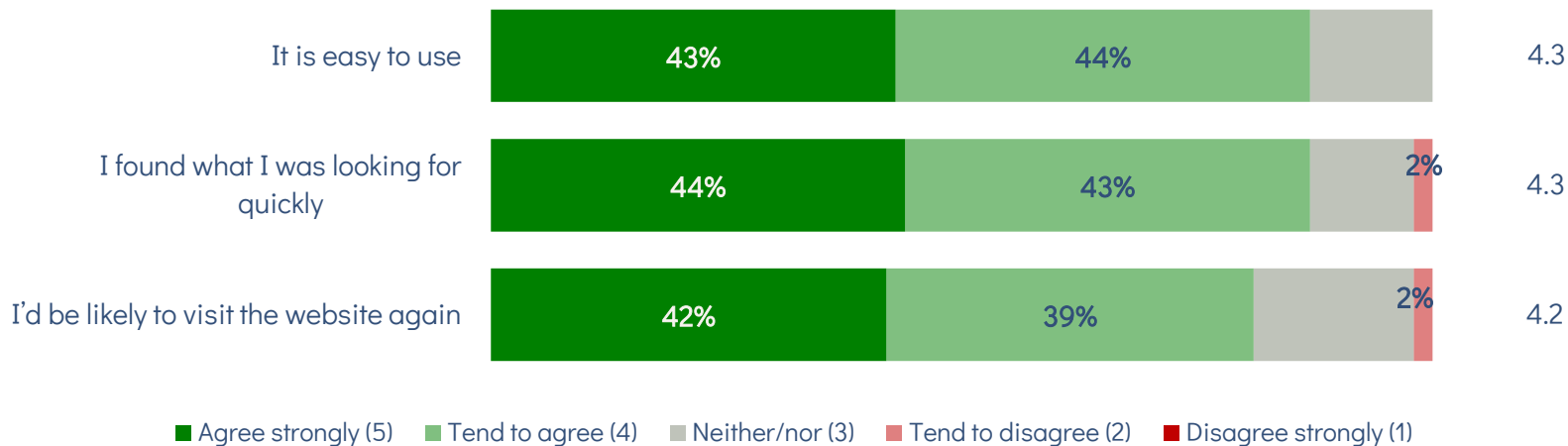
Base: not visited website (262)



## 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

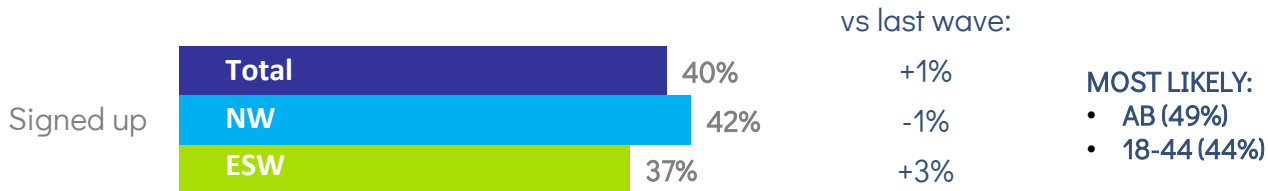


All higher among women and 18-34's



## E-billing sign-up

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



Base: all respondents (500)

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

	Total	NW	ESW
Nothing	32%	35%	27%
Prefer paper bills	20%	17%	24%
Didn't know about it/never considered	10%	12%	7%
Water bill included in my rent/not the bill payer	6%	9%	2%
No reason/just have not done it	4%	4%	4%
I use direct debit/standing order/app	3%	4%	3%
Better online security	3%	2%	5%
Happy to do so/will do/will consider it	3%	3%	3%
Too many emails/may forget to check/delete	2%	2%	2%

Base: not signed up (229)



# Priority Services

---



# Awareness of Priority Services support is one fifth; recall of the Water Without Worry campaign is higher this wave

vs last wave:

*Have you seen, heard or read anything from NW/ESW about how they can help people who may be struggling to pay their household bills?*

Seen or heard anything



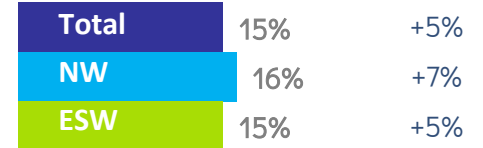
*Have you seen, heard or read anything from NW/ESW about how they can help people who may need extra support in other ways?*

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		20	12	8
TV		20	11	9
Newspaper		16	10	6
Social media		16	10	6
In with the bill		16	9	7
Email		16	7	9
Poster on bus stop/shelter		14	10	4
Magazine		13	7	6



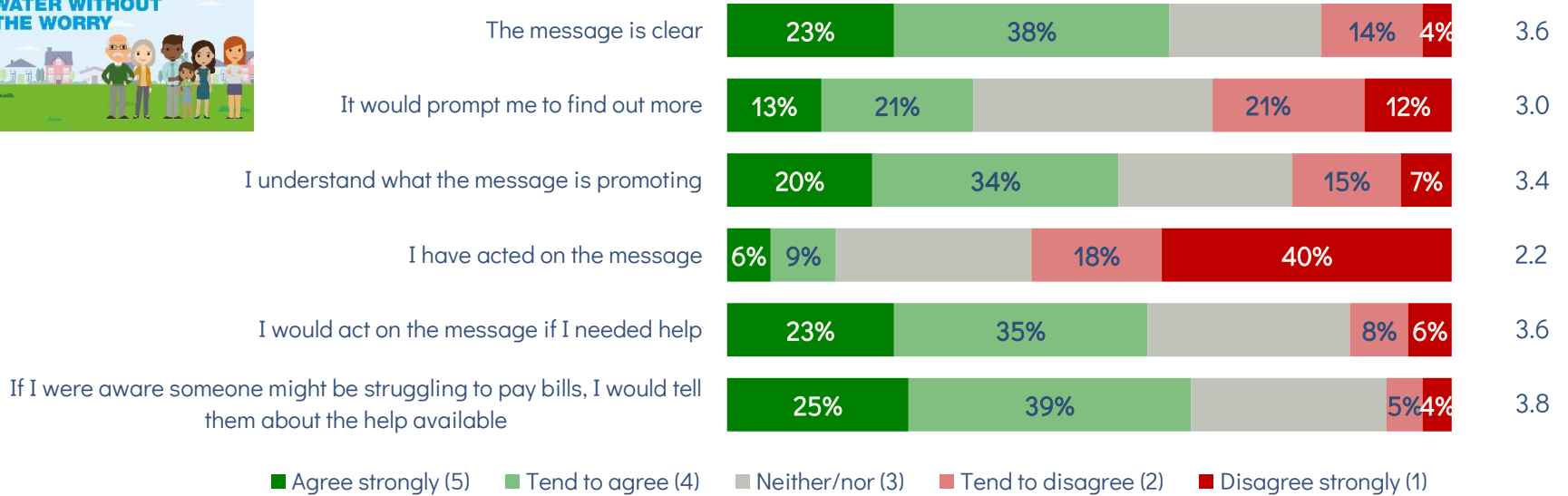


# The campaign, without any further messaging or call to action, is not clear

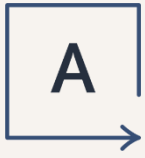
To what extent do you agree or disagree with the following statements, about this material:



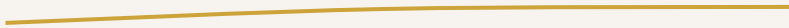
Mean score 5-1



All higher among women. First four statements higher among 18-34s.



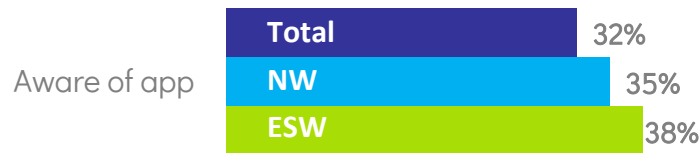
# The app





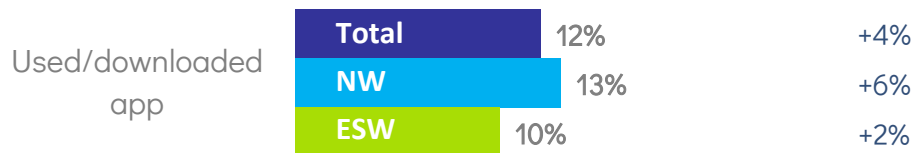
# Just over 1 in 10 have used or downloaded the app; the majority are satisfied with it

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



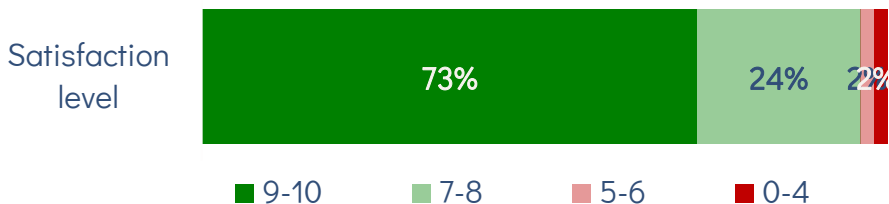
vs last wave:

*Have you used or downloaded the app?*



Base: all respondents (500)

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



Base: used/downloaded app, where answer given (55)

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

Nothing/don't know	71%
Quicker/more responsive	3%
More rapid updates	2%
Ability to report an issue	2%

Base: used/downloaded app (59)

A

The ability to see water usage/costs, incentives for using it, and actively inviting customers to download it are top ways for encouraging take-up of the app

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

- Nothing (50%)
- See water usage/costs (8%)
- Invite customers to join (7%)
- No - don't have a smartphone (5%)
- Incentive/reduced bills (4%)
- Would be happy to use (4%)
- View bill/account (4%)
- Prefer online on PC to app (3%)
- No need (3%)
- Water saving info/advice (2%)



I like mine...

---

A

15% of customers have seen the 'I like mine' campaign across all regions, mainly recalled on social media, the TV and in newspapers

*Here is an example of Northumbrian Water's/Essex & Suffolk Water's recent communications. Do you recall seeing either of these, before today? (both images shown)*

	Overall	NW	ESW	
Have seen at least one	15%	15%	15%	+5% overall vs last wave
	9%	9%	11%	
	13%	13%	13%	

6% in NW and 9% in ESW have seen both

*Where have you seen this?*

	Total (74)	NW (45)	ESW (29)
Social media	30%	27%	34%
TV	27%	18%	41%
Newspaper	26%	22%	31%
Poster on side of bus	23%	16%	34%
On their website	20%	20%	21%
Magazine	19%	16%	24%
Poster on bus stop/shelter	12%	13%	10%
Radio	12%	7%	21%
Poster on roadside billboard	11%	13%	7%
In with the bill	11%	11%	10%
Leaflet through post/door	11%	16%	3%
On a van	11%	11%	10%
Train/Metro	3%	-	7%

Base: recall campaign (as shown)

A

## The 'I like mine' campaign is felt to be colourful and eye-catching, but some don't 'get' the point

*What aspects of these communications, if anything, grab your attention? (open)*

	Total (500)	NW (300)	ESW (200)
Colours/colourful/vibrant/bold/bright	28%	32%	22%
Nothing	27%	27%	29%
Quality water/just add water/water is good	9%	7%	12%
Pictures/imagery	6%	5%	7%
Eyecatching/stands out	5%	3%	7%
Fun/cheerful/humorous	4%	4%	3%
People/characters	3%	3%	4%
Emotions/smiling/happiness	3%	3%	4%
The 'hot & cold'/hot/cold	3%	3%	4%
Message/slogan	3%	3%	3%
Good/like it/great	3%	2%	3%
Clear/simple message/easy to understand	3%	3%	2%
Don't understand message/confusing	3%	3%	2%
I like mine hot/cold/how I like it	2%	2%	2%

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

	Total (500)	NW (300)	ESW (200)
Don't understand what it's about	17%	17%	16%
Shows water is versatile/people need it	16%	14%	20%
Water is all you need/just add water	13%	13%	12%
Provide hot/cold water	8%	8%	8%
Water is good/great/safe/clean	6%	6%	5%
Use water/use more water (unspec)	5%	5%	5%
Water is always available	5%	5%	5%
Provide water however you want/like it	5%	4%	6%
Don't know	4%	5%	4%
Water is life/important	4%	4%	5%
Normal people/inclusiveness/diversity	4%	5%	2%
Nothing/not a lot	3%	3%	2%
Water/water supplier	3%	3%	4%
Encourages people to drink more water/healthy	3%	4%	2%
Reassured about the company/service	3%	3%	3%



DEFINING THE **CLEAREST** DIRECTION

---

**TELEPHONE** | +44 (0)113 237 5590

**WEBSITE** | [www.allto.co.uk](http://www.allto.co.uk)

**ADDRESS** | 23 Harrogate Road, Chapel Allerton, Leeds, LS7 3PD

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

