



3 / 12 / 20

Campaign awareness omnibus

Results: Qtr4 2020

Our ref. J3068.2



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:

- 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

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Approach

On-going research programme with the last 2 waves carried out online

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:

14 Oct – 6 Nov '20

Average interview length:

14.6 minutes



Demographics

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Quotas were set to broadly match the profile of the population

Sample profile	Total	NW	ESW
Base: all respondents	(500)	(300)	(200)
Male	50%	50%	50%
Female	50%	50%	50%
18-34	24%	24%	25%
35-44	20%	20%	20%
45-54	18%	18%	18%
55-64	15%	15%	16%
65+	23%	23%	23%
AB	30%	30%	32%
C1/C2	46%	45%	47%
DE	24%	25%	22%



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	(387)	(43)	(50)	(161)	(26)	(26)	(81)
Northumbrian Water	74%	98%	76%	89%	96%	31%	86%
United Utilities	8%	7%	8%	7%	4%	12%	11%
Yorkshire Water	6%	5%	16%	4%	4%	4%	5%
Anglian Water	5%	5%	2%	1%	-	4%	15%
None of these	7%	-	4%	6%	-	62%	1%

Postcode area - South	Total	CM	CO	IG	IP	NR	RM	SS
Base: all responding this far	(786)	(106)	(88)	(35)	(171)	(228)	(63)	(95)
Essex & Suffolk Water	27%	43%	10%	31%	6%	15%	62%	68%
Anglian Water	70%	47%	82%	6%	91%	87%	22%	64%
Thames Water	19%	25%	16%	74%	8%	8%	51%	19%
United Utilities	6%	6%	5%	23%	2%	4%	8%	14%
None of these	6%	16%	10%	3%	4%	4%	-	2%

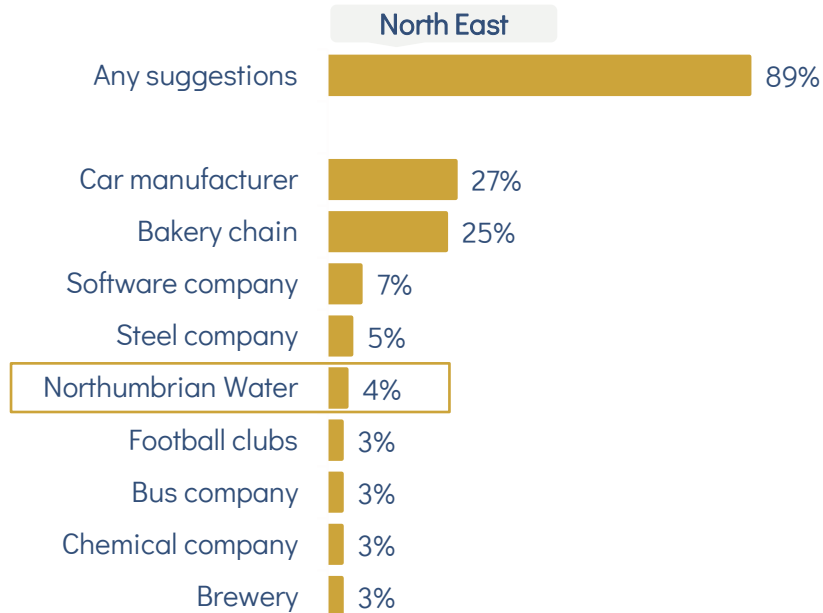
The rest of the results in this report are based just on the total 500 respondents who identified NW/ESW as their water company

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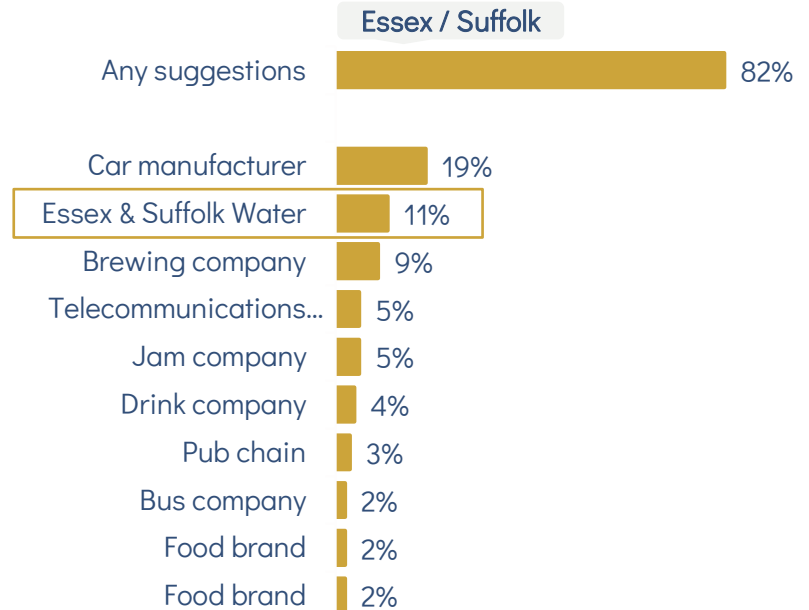
Companies associated with each area

Compared to Qtr2, fewer ESW customers were able to specify a company (82% vs. 89% in Qtr2 2020)

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



Base: all respondents (300)

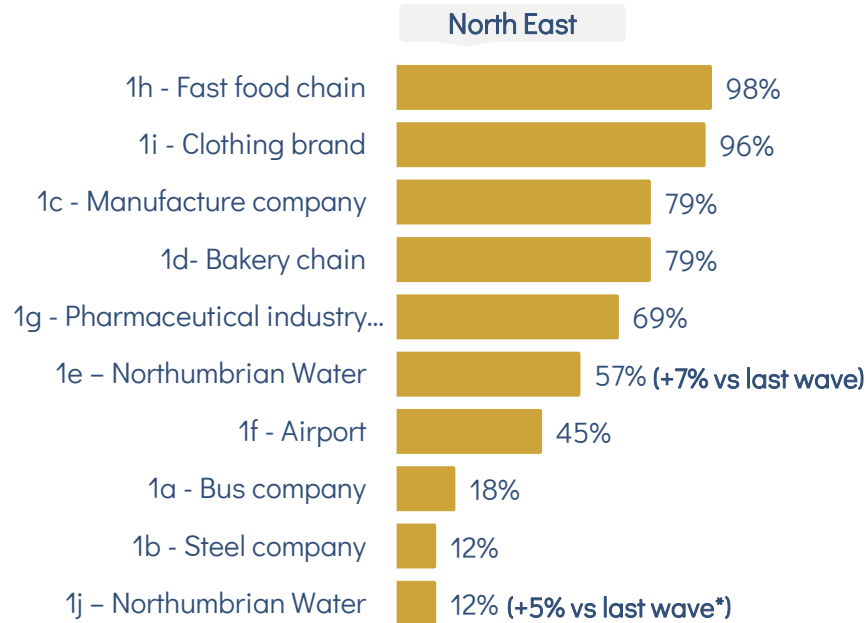


Base: all respondents (200)

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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?

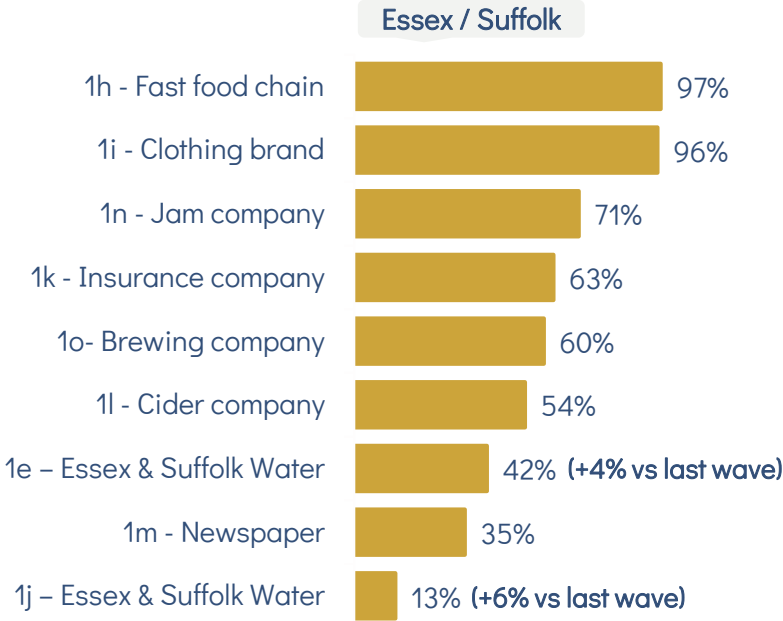


* Statistically significant difference



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

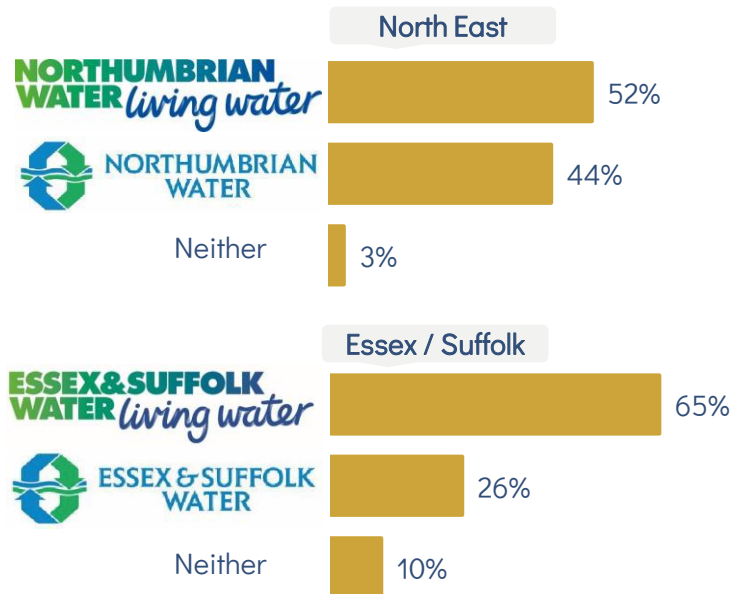
Which of these logos, if any, do you recognise?



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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

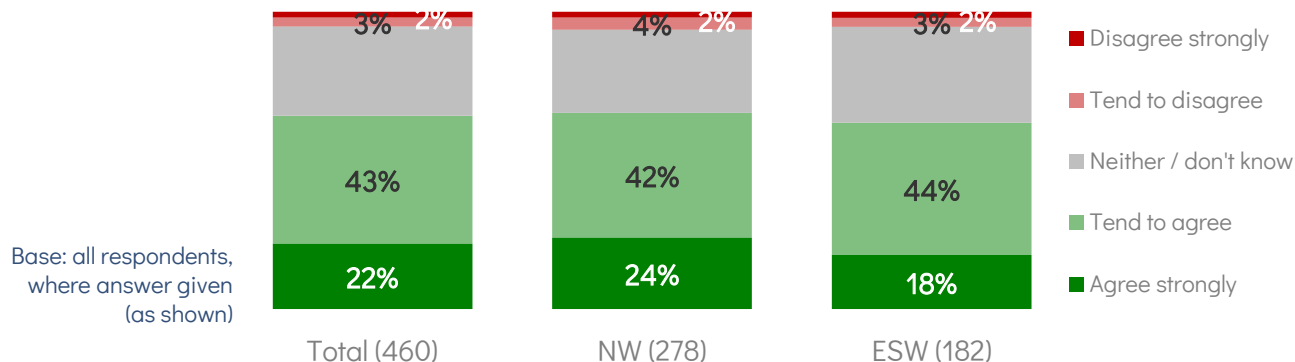
	NORTHUMBRIAN WATER living water	ESSEX & SUFFOLK WATER living water
Base: all respondents	(300)	(200)
Nothing/don't know	27%	28%
Neutral/indifferent	14%	13%
OK	9%	12%
Good/great	7%	8%
Safe	4%	3%
Happy	3%	3%
Familiar – my area	3%	2%
It's about water	3%	2%
Confused	2%	2%
Positive	1%	2%
Calm/relaxed	1%	2%
Bored/uninspired	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 18-34s
Also higher among those who recall having seen any NWG campaigns/messaging

If agree, why?(top mentions)

Good service	15%
Good/fair price	14%
Good company/do a good job	13%
Trustworthy	7%
Good reputation	6%
Quality/safe water	4%

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

Not heard anything bad about them	4%
Had no problems	3%
Care about environment	3%
Care about customers	3%
Good communication	3%
Helpful	3%

Only interested in profits	8%
They are a utility provider	7%
Expensive	6%
No reason to believe otherwise	2%
They are okay	2%

Base: agree (297)

Base: disagree/neither (163)



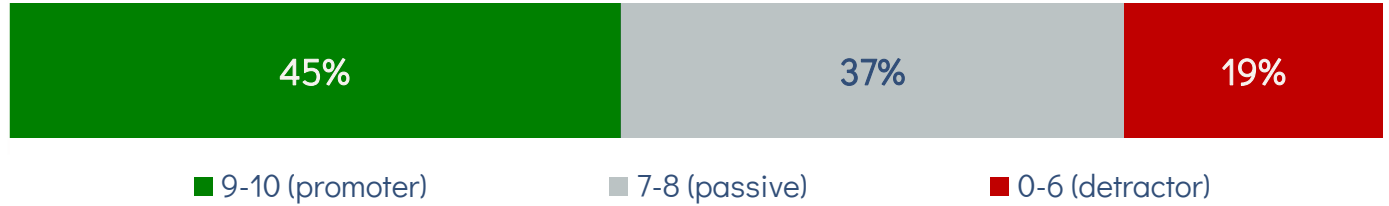
Key metrics



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'

Net Promoter Score



Base: all respondents, where answer given (357)

As many as 29% overall (and 33% in ESW and 37% of the 65+ age group and of DEs) felt unable to give a score.

NPS: +25.8

Higher among women, 18-34s and DEs
Also higher among those who recall having seen any NWG messaging or campaign materials (+40.0)

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Top reasons for NPS scores

Promoters (scores of 9-10) – 159 respondents

- No problems (28%)
- Good customer service (22%)
- Good company/do a good job (14%)
- Good value/fair price (12%)
- Reliable/trustworthy (7%)
- No supply problems (4%)
- Easy to deal with (4%)
- Good experience with them (4%)
- Helpful (3%)
- Good communication (3%)
- Good water quality (3%)
- Been with them for years (3%)
- Good reputation (3%)
- Quick response (2%)

Passives (scores of 7-8) – 131 respondents

- No problems (24%)
- Good customer service (11%)
- Good company/do a good job (12%)
- OK (10%)
- Reliable/trustworthy (5%)
- Good/fair price (4%)
- Good water quality (4%)
- Good experience with them (3%)
- Efficient (2%)
- No supply problems (2%)
- Expensive (2%)
- Nothing to compare against/no choice/had no real dealings with them (5%)

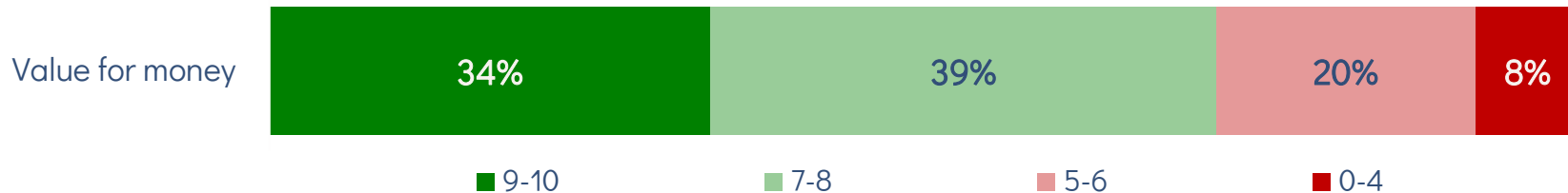
Detractors (scores of 0-6) – 67 respondents

- Neutral/indifferent (18%)
- Expensive (15%)
- Okay/fine (7%)
- No problems (4%)
- Poor water quality (4%)
- Good company/do a good job (4%)
- Helpful (3%)
- Only interested in profit (3%)
- No supply problems (3%)
- Poor customer service (3%)
- Too many leaks (3%)
- Don't recommend anyone/no-one to recommend to (3%)
- Nothing to compare against/no choice/had no real dealings with them (24%)



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 (379)

A majority were able to give an answer here, although 24% overall (and as many as 29% of ESW customers and 33% of DEs) felt they did not have enough knowledge to give a score.

Mean score: 7.4
-0.1 vs. last wave (Qtr2 2020)

Higher among women and 18-44s

Also higher among those who recall having seen any NWG messaging or campaign materials (7.9)

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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 (54%)
- Good/reliable service (20%)
- Too expensive (7%)
- Reliable supply/no supply problems (6%)
- Nothing (6%)
- Good quality water (5%)
- No problems (2%)
- No/minimal leaks (2%)

- Have no choice/nothing to compare against (4%)

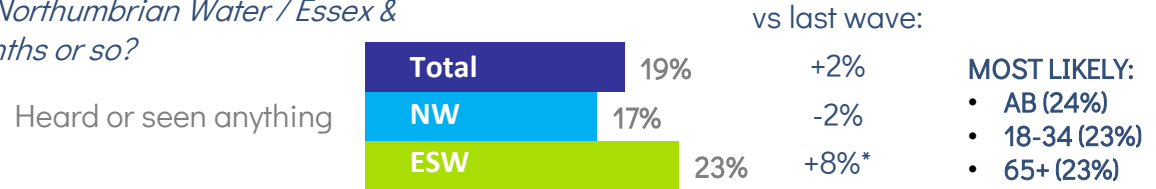


Unprompted campaign awareness



Around a fifth spontaneously recall any NWG activity, with a big rise for ESW

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 water saving advice/devices		23	4	19
Their cars/vans		14	10	4
Advertising (unspecified)		7	6	1
Covid-19 related information		4	1	3
About work being done		4	3	1
Insurance		4	4	-
Helping people with financial difficulties		4	-	4
Dwaine Pipe/blocked drains/what not to flush		3	3	-
Environmental information – cleaning rivers		3	3	-

* Statistically significant difference

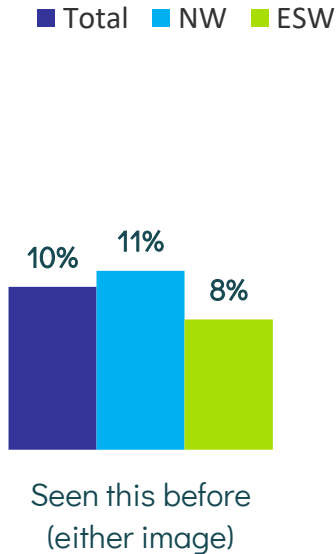


Just Add Water



The two new Just Add Water ads perform similarly in terms of recall and together reached around 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)



Seen Helping Hand



Seen Advice

MOST LIKELY TO HAVE SEEN EITHER:

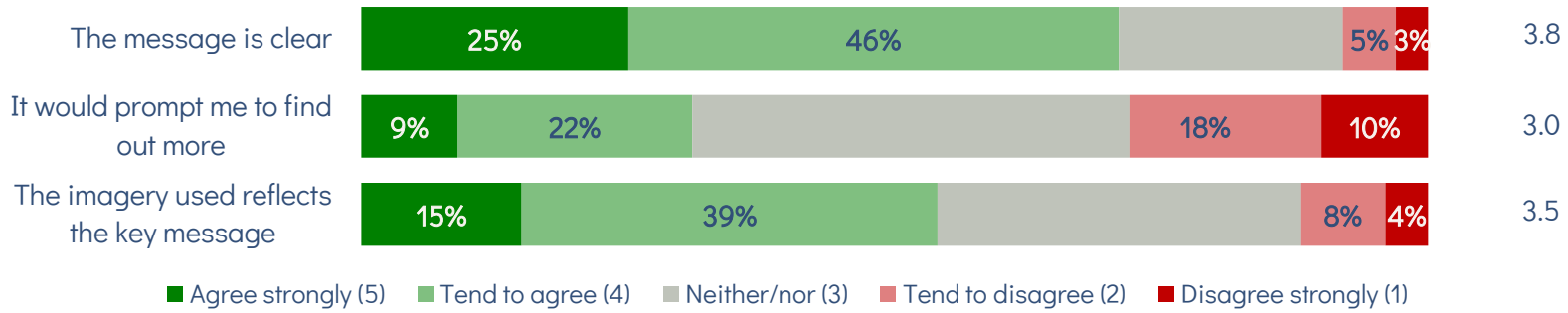
- Men (13%)



The vast majority feel the message conveyed by the new ads is clear, a significant improvement on the previous ads

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

Compared to the (different) ads used in Qtr2 2020, for the current ads customers are significantly more likely to feel the message is clear (3.9 versus 3.7)

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

What do you think about this initiative? (open)

	Just add water
Base: shown this image	(500)
Good/great/like it	17%
Nothing/no interest	17%
OK	13%
Reassuring that they are always there for you	8%
Confusing/don't know what it means	6%
Clear/easy to understand	6%
Simple	4%
NWG are easy to contact	3%
Waste of money	3%
Informative	3%

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Just Add Water: Summary by Location

	Newcastle (57)	Sunderland (26*)	Chelmsford (26*)	Great Yarmouth (16*)	Romford (31)
Recall					
Helping hand	16%	4%	8%	-	13%
Advice	16%	8%	8%	6%	10%
Both	11%	-	4%	-	10%
Either	21%	12%	12%	6%	13%
Attitudes (% agree)					
The message is clear	74%	69%	85%	69%	81%
It would prompt me to find out more	49%	35%	46%	38%	35%
The imagery used reflects the key message	60%	58%	69%	69%	65%

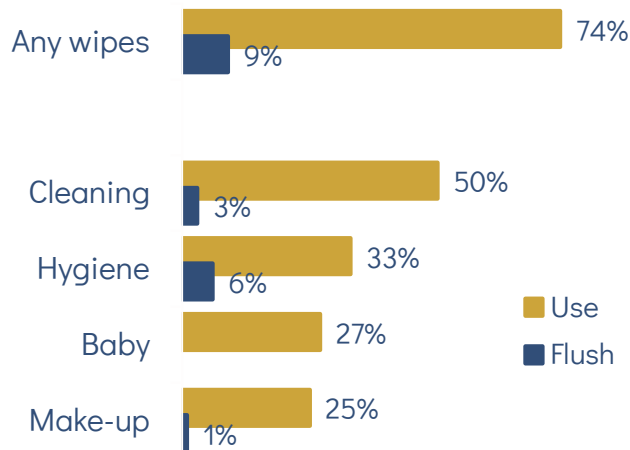


Blockages (NE only)

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Around three quarters use any type of wipes; 9% (equating to 12% 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?*



27 consumers say they ever flush wipes. Why?

- The packaging says they are flushable (70%)
- More hygienic than putting in a bin (33%)
- Ease/convenience (22%)
- Just like toilet paper (15%)
- No bathroom bin (7%)
- They're small enough to flush (7%)
- Not aware of any reason not to (7%)

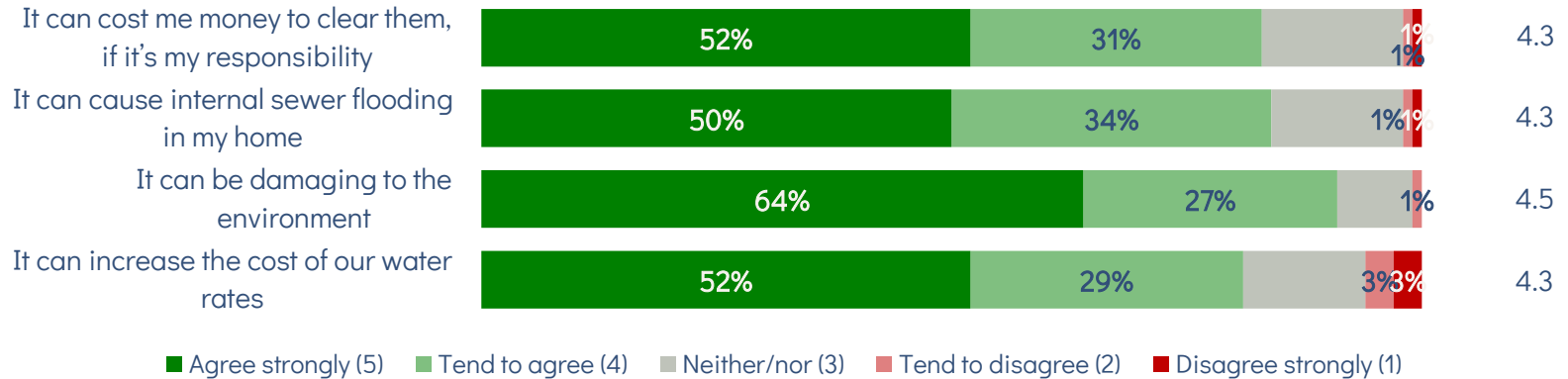


The vast majority understand the potential impact of flushing wipes

Are you aware that flushing wipes can cause blockages? **96%** vs last wave: =

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 cost me money to clear them if my responsibility - higher among ABC1
Can be damaging to the environment – higher among women



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: =

What do you recall seeing or hearing?

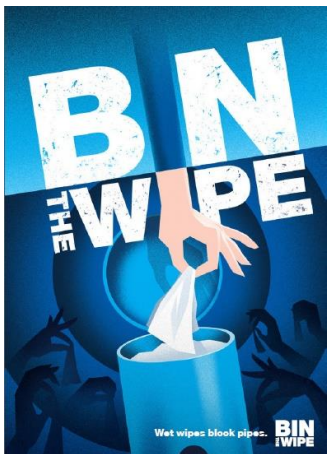
Dwaine Pipe/pee and poo	8%
Not to flush wipes	7%
TV/radio advertising	4%
What can and can't be flushed	4%
On their vans	2%
Leaflets	2%
Posters	2%
Damage/cost of flushing inappropriate materials	2%
Bus/bus shelter	1%
On their website	1%
Letter	1%
Online	1%
Can't remember	3%

A

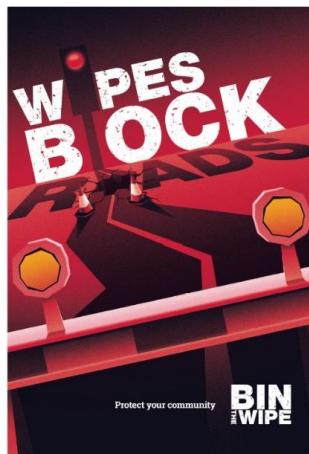
Recall of the BTW image of a wipe being binned is higher than for the rest

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)

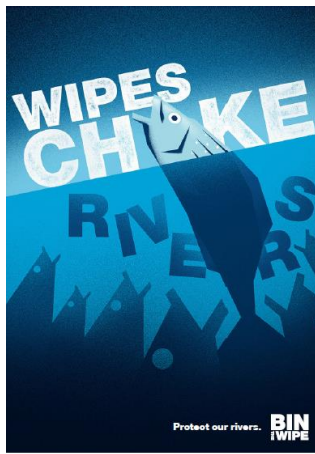
10% (all images) vs last wave: -1%



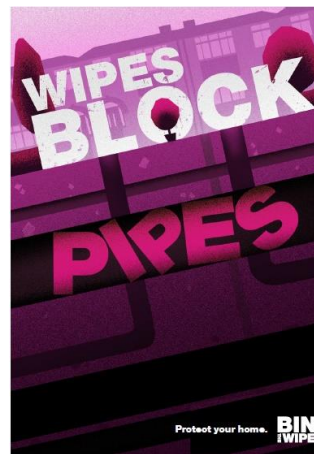
18%



3%



5%



11%



12%

A

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	Flood Homes
Base: shown this image	(71)	(62)	(65)	(53)	(49)
Don't flush wipes down the toilet	24%	15%	6%	13%	14%
Unclear/message not obvious	4%	19%	14%	9%	16%
Clear/to the point	14%	3%	3%	15%	6%
Good/like it	14%	6%	2%	11%	6%
Important message/everyone should be made aware	8%	5%	3%	6%	-
Informative	3%	-	3%	6%	10%
Striking/dramatic/bold	3%	5%	5%	6%	2%
Impact on environment/fish	-	-	15%	-	-
See the effect of blockages	-	6%	2%	2%	2%
Misleading/confusing	1%	10%	-	-	-
Common sense	6%	-	2%	2%	-
Doesn't apply to me (I don't flush wipes)	4%	-	2%	4%	-
Nothing	3%	5%	15%	8%	16%

 = highest response for this design

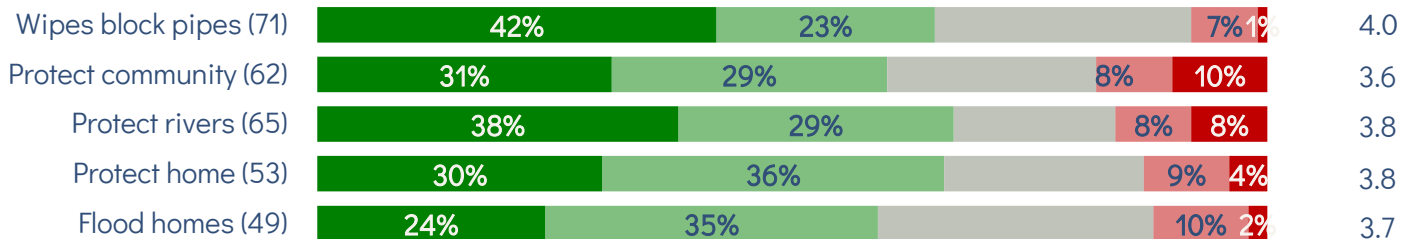


The Wipes Block Pipes variant is consistently the strongest

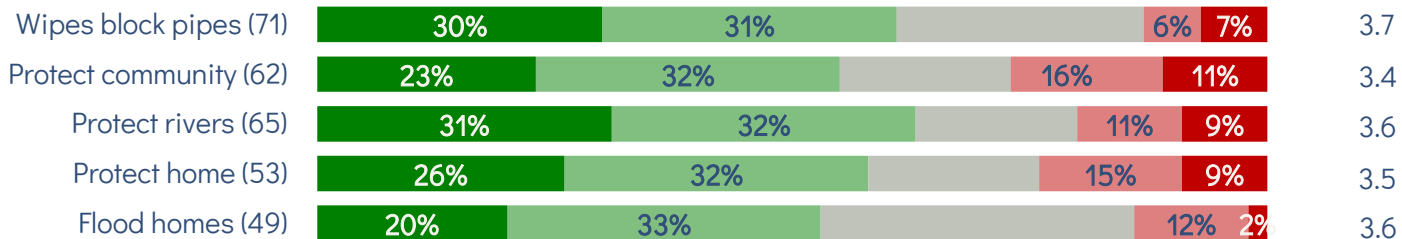
Please tell me to what extent you agree or disagree with the following statements, about this material

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



A

Relatively few suggestions to improve the campaign designs

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

	Wipes Block Pipes	Protect Community	Protect Rivers	Protect Home	Flood Homes
Base: shown this image	(71)	(62)	(65)	(53)	(49)
Nothing/it can't	31%	19%	22%	13%	20%
More coverage/wider publicity	8%	5%	6%	11%	14%
Clearer/more focussed message	6%	13%	14%	2%	4%
Fines for offenders	8%	6%	3%	13%	-
Brighter/more colourful/eye catching	3%	3%	5%	8%	4%
Better/more imagery	1%	5%	5%	-	4%
Make it more powerful/stronger message	1%	-	3%	4%	4%
Clearer image/picture	1%	2%	3%	4%	2%
Images of blocked sewers/pipes	1%	3%	3%	-	2%
Easier to read/clearer/bigger font	1%	3%	3%	-	2%



Bin The Wipe: Summary by Location

	Durham (52)	Newcastle (57)	Stockton (21*)
Recall			
Any	25%	14%	5%
Attitudes (% agree)			
It can cost me money to clear them, if it's my responsibility	81%	81%	86%
It can cause internal sewer flooding in my home	83%	79%	86%
It can be damaging to the environment	88%	88%	90%
It can increase the cost of our water rates	81%	82%	76%
Behaviour (% agree)			
This would make me personally think twice about how I dispose of wipes	69%	67%	71%
The campaign message is powerful enough to encourage people to change their behaviour	60%	61%	67%



Leakage

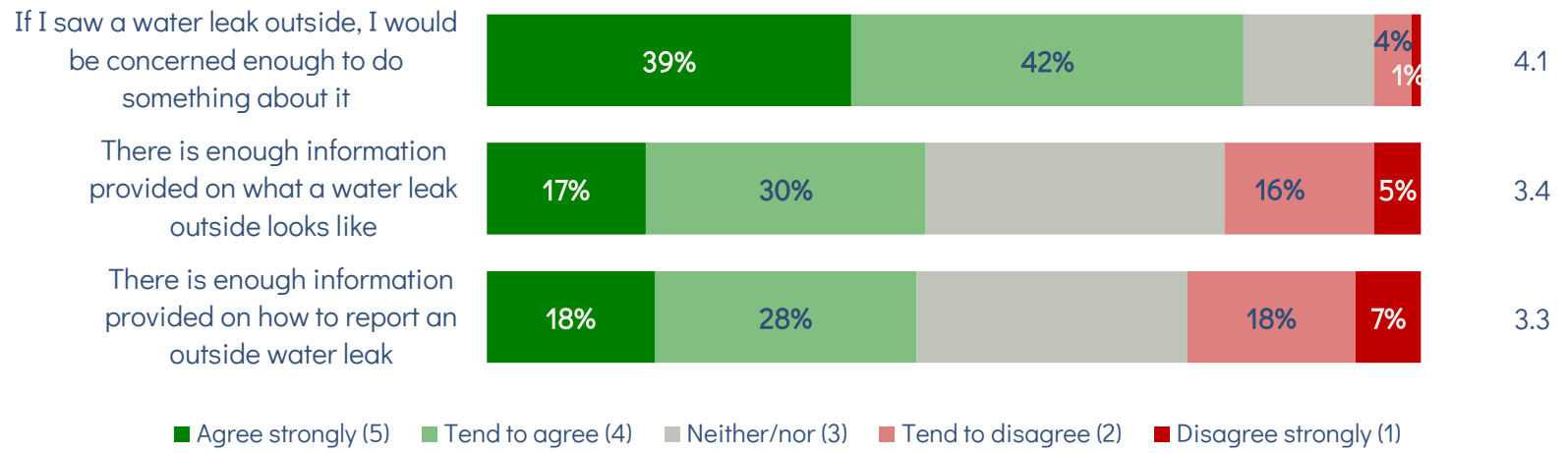




4 in 5 would be concerned enough to report a leak, but fewer feel there is enough information on leaks and reporting them

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 ABC1s

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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 (44%)
- Report it - where, not specified (18%)
- Nothing/ignore it (14%)
- Call the council (10%)
- Go online – unspecified (3%)
- Google who to inform (3%)
- Don't know (4%)

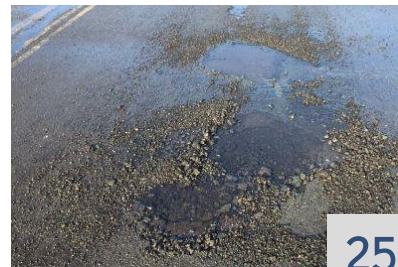
Which of these examples, if any, would you report, if you saw them in a road, path or public area?



70%



89%



25%



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?



What do you recall seeing or hearing?

	Nos.	Total	NW	ESW
To report it		10	8	2
Information on website		9	4	5
Information with the bill		6	1	5
Advice/contact numbers		5	3	2
A dedicated number		2	2	-



Two thirds 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	67%	69%	65%
Via the website	15%	16%	14%
Look on website for advice	8%	7%	9%
Email	6%	7%	6%
Consult Google	2%	3%	2%

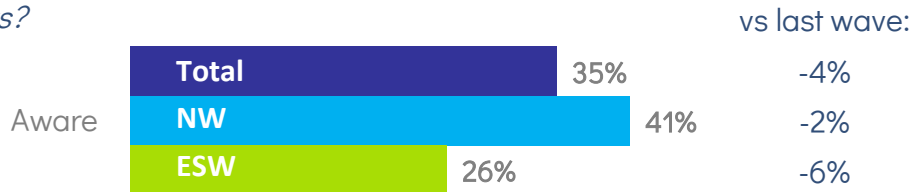


Waterside Parks



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, Hanningfield and Kielder Waterside Parks?



MOST LIKELY:

- Men (38%)
- 55+ (45%)
- AB (42%)

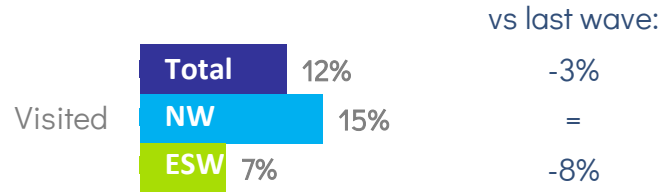
How did you hear about these Parks?

	Total	NW	ESW
Word of mouth	14%	18%	9%
Internet search	5%	6%	5%
Facebook	5%	6%	3%
Previously visited	4%	5%	4%
Newcastle Chronicle	3%	5%	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?



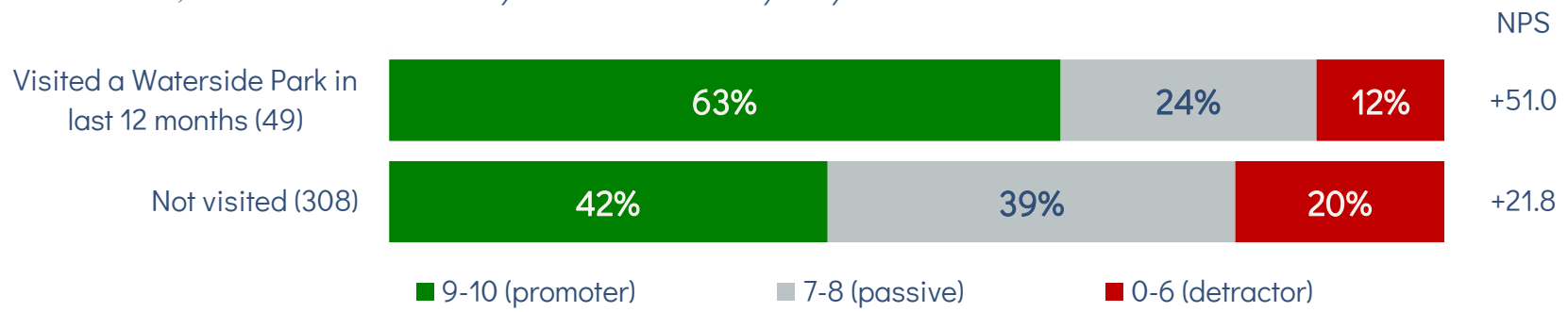
Which one(s)?

	Total	NW	ESW
Kielder	6%	10%	-
Derwent	5%	8%	-
Hanningfield	3%	1%	7%
Fontburn	1%	1%	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)

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

Visitors give a significantly higher NPS score

Visitors are also more likely to give a likelihood to recommend score in the first place (89%) than non-visitors (70%) – this may indicate a greater degree of engagement with the brand among visitors



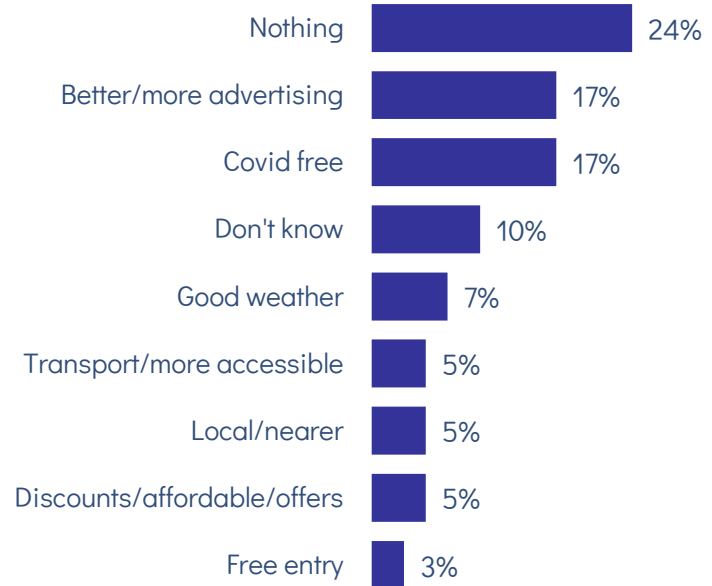
Motivations for visiting Waterside Parks

What in particular encouraged you to visit? (open)



Base: visited Waterside Park in last 12 months (58)

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



Base: not visited a Waterside Park in last 12 months (442)



Website





Visiting the website

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

vs last wave:

	Total	
Visited	43%	-3%
	NW	-5%
	ESW	=

What were you looking for?

	Total	NW	ESW
Query my bill	40%	35%	47%
Pay a bill	10%	8%	12%
For contact numbers	10%	11%	8%
General information/advice	8%	8%	8%
Report a leak	6%	4%	8%
About water meters	5%	7%	1%
About moving house	4%	4%	5%
About water saving advice/devices	3%	5%	1%
About bill payment options	3%	3%	4%

Base: visited website (215)

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

	Total	NW	ESW
Nothing	46%	40%	55%
To find contact numbers	10%	11%	10%
To report a leak	9%	10%	7%
Help/advice/general information	7%	7%	8%
To report a problem	7%	8%	5%
Loss of supply	5%	8%	1%
Bills/account query	5%	6%	3%
To pay a bill	3%	4%	2%
For local works information	1%	2%	1%

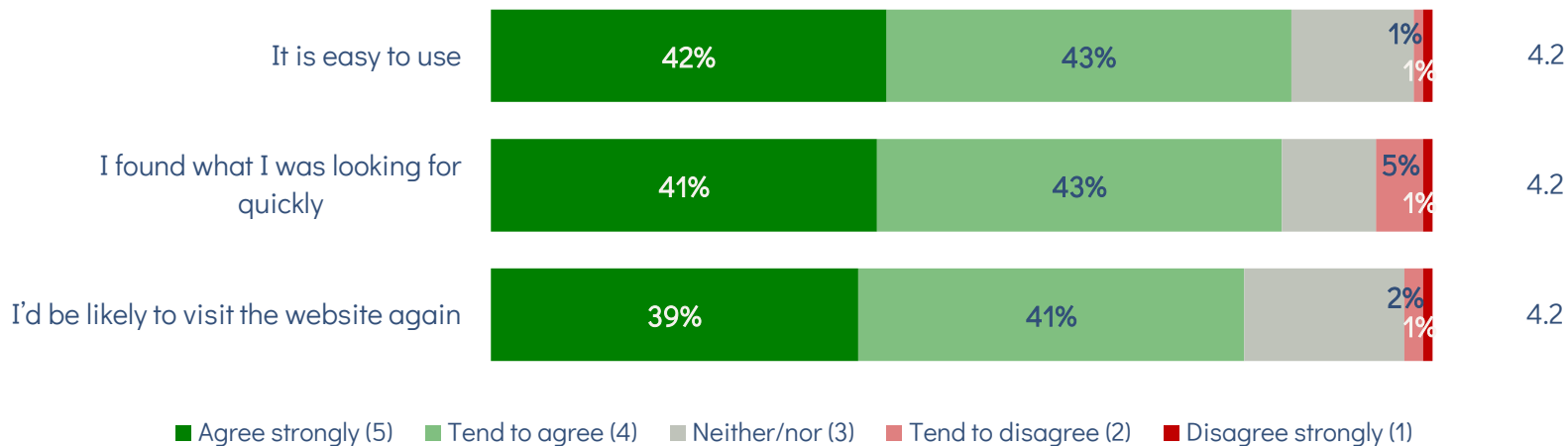
Base: not visited website (285)



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

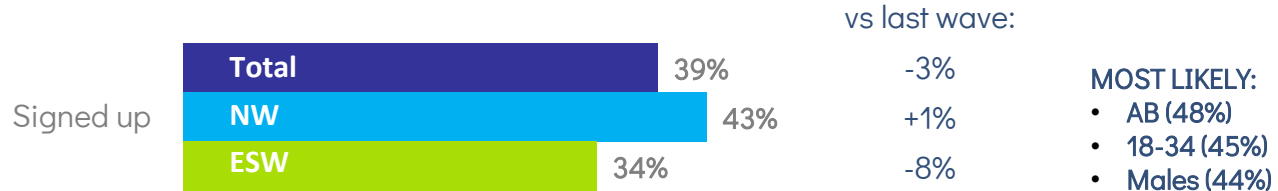


All higher among women and 18-34's



E-billing sign-up

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



Base: all respondents (500)

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

	Total	NW	ESW
Nothing	32%	32%	32%
Discounts/cheaper bills/ incentives	26%	25%	28%
If invited/made aware	6%	5%	6%
Prefer paper bills	5%	5%	5%
More information/instructions	4%	5%	4%

Base: not signed up (230)



Priority Services

A

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

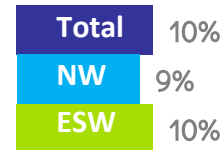
Have you seen, heard or read anything from Northumbrian Water / Essex & Suffolk Water about how they can help people who may be struggling to pay their household bills?

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	7	8
Information in with bills		11	7	4
Social media		10	7	3
In a newspaper		9	8	1
Poster on bus shelter		9	6	3
In a magazine		8	5	3

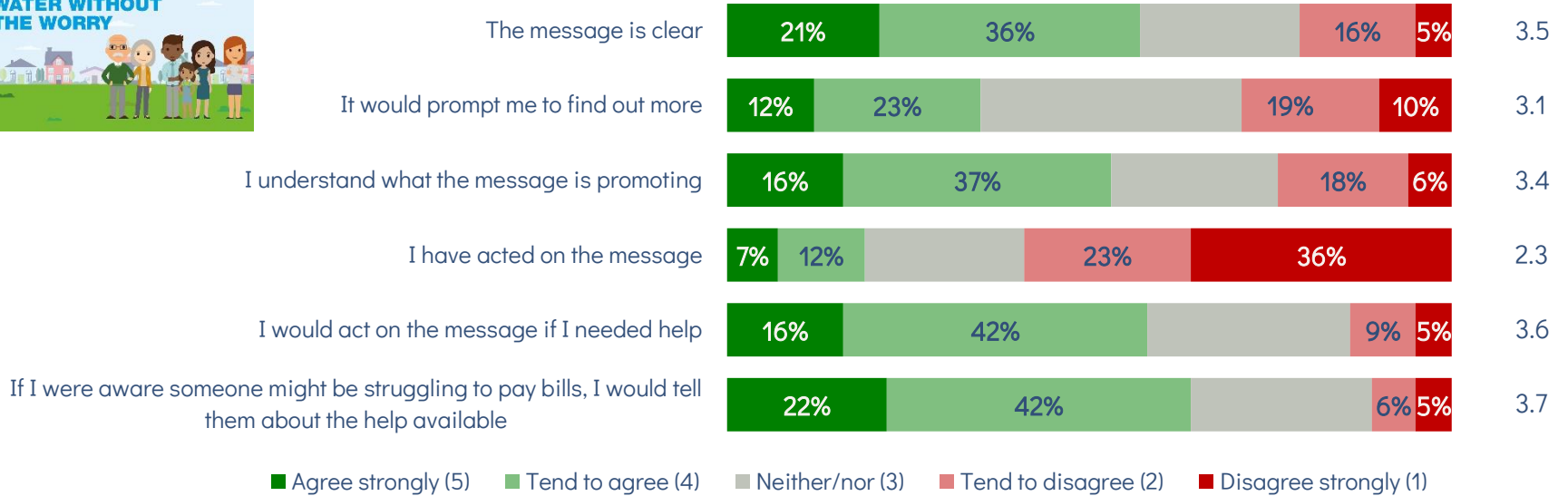


The campaign, without any further messaging or call to action, is not clear

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



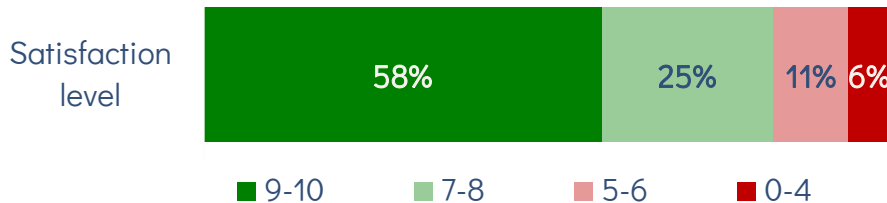
Just under 1 in 10 have used or downloaded the app; the majority are satisfied with it

Have you used or downloaded the Northumbrian Water / Essex & Suffolk Water app?



Base: all respondents (500)

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



Base: used/downloaded app, where answer given (36)

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

Nothing/don't know	55%
More rapid updates	5%
Make it easier to navigate	5%

Base: used/downloaded app (38)

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 (53%)
- See water usage/costs (8%)
- Incentive/reduced bills (6%)
- Invite customers to join (6%)
- Would be happy to use (5%)
- View bill/account (5%)
- No - don't have a smartphone (5%)
- Prefer online on PC to app (2%)
- Might download it if I needed to (2%)





I like mine...

A →

1 in 10 customers have seen the ‘I like mine’ campaign across all regions, mainly on TV, social media 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	10%	10%	10%	MOST LIKELY: • 18-34 (17%) • Men (13%)
	9%	9%	8%	
	5%	5%	6%	

NB 4% in each area have seen both

Where have you seen this?

	Total (51)	NW (31)	ESW (20*)
TV	35%	35%	35%
Social media	31%	32%	30%
Newspaper	24%	32%	10%
Magazine	18%	19%	15%
Poster on bus shelter	18%	16%	20%
Poster on roadside billboard	14%	10%	20%
Website	14%	6%	25%
Leaflet through the door	12%	16%	5%
Poster on bus	10%	10%	10%
With bill	10%	10%	10%
Radio	6%	6%	5%
Metro	4%	6%	-

*caution – low base

Base: recall campaign (as shown)

A

3 in 10 thought the 'I like mine' campaign was colourful and vibrant

What aspects of these communications, if anything, grab your attention?

	Total (500)	NW (300)	ESW (200)
Nothing	36%	37%	34%
Colourful/vibrant/bold	30%	31%	29%
Water/quality water	5%	4%	8%
The characters	4%	3%	5%
Good/like it/great	3%	3%	5%
Pictures/imagery	3%	2%	6%
Eye-catching/stands out	3%	3%	3%
Clear, simple message/easy to understand	2%	3%	1%
Emotions/smiling/happiness	2%	2%	3%
The 'hot and cold'	2%	2%	3%
Font stands out	2%	2%	2%
Fun/cheerful	2%	2%	2%

What do you think about this initiative?

	Total (500)	NW (300)	ESW (200)
Nothing	20%	21%	19%
Good/like it	15%	14%	17%
OK	13%	14%	11%
Don't understand what it's about	7%	7%	7%
Pointless/waste of time	5%	5%	5%
Clear/easy to understand	4%	4%	5%
Waste of money	4%	3%	6%
Indifferent/no opinion	4%	4%	4%
Eye-catching	3%	2%	4%
Very good	2%	3%	2%
Positive/effective	2%	3%	2%
Colourful/bold	2%	1%	2%
Dull/boring	2%	1%	3%

A

I Like Mine: Summary by Location

	Gosforth (5*)	Newcastle (57)	Redcar (10*)	Stockton (21*)	Sunderland (26*)	Grays (5*)
Recall						
Cold	20%	9%	20%	10%	4%	-
Hot	20%	18%	10%	10%	12%	-
Both	20%	7%	10%	10%	-	-
Either	20%	19%	20%	10%	15%	-

(No responses received for Fenham)



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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

