

# Six Month Review awareness omnibus

NWG

June 2022

# Contents

<a href="#">Introduction</a>	3
<a href="#">Demographics</a>	4-5
<a href="#">Brand</a>	6-12
<a href="#">Value of water</a>	13-14
<a href="#">Key metrics</a>	15-17
<a href="#">Unprompted campaign awareness</a>	18-19
<a href="#">Just Add Water</a>	20-24
<a href="#">Water resilience</a>	25-34
<a href="#">Wastewater (NE only)</a>	35-41
<a href="#">Leakage</a>	42-46
<a href="#">Leaking toilet</a>	47-50
<a href="#">Smart metering</a>	51-57
<a href="#">Waterside Parks</a>	58-64
<a href="#">Website</a>	65-68
<a href="#">Priority Services</a>	69-75
<a href="#">The app</a>	76-78



# Introduction

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

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

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

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

Fieldwork dates: 26<sup>th</sup> May – 13<sup>th</sup> June 2022

Average interview length: 13 min, 32 seconds

Location	Interviews
North	300
Essex	150
Suffolk	50
TOTAL	500

Covering, this wave:

- Recall of Just Add Water activity
- Usage/disposal of wipes and awareness that flushing wipes can cause blockages (NE only)
- Recall and views on the water resilience campaign
- Action in the case of outside leaks
- Understand of the leaking toilet campaign
- Understanding of the Smart Water Meter campaign
- Usage of NWG's Waterside Parks and website
- Recall of, and views on, the Priority Services campaign
- Usage of NWG's app





# Demographics

**NWG**  
*living water*

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

# Demographics

Quotas were set to broadly match the profile of the population

Sample profile	Total	NW	ESW
Base: all respondents	500	300	200
Male	253	153	100
Female	247	147	100
18-34	125	76	49
35-44	80	46	34
45-54	85	52	33
55-64	82	50	32
65+	128	76	52
AB	144	86	58
C1C2	218	132	86
DE	138	82	56





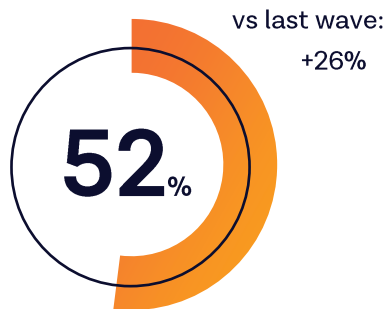
Brand

**NWG**  
*living water*

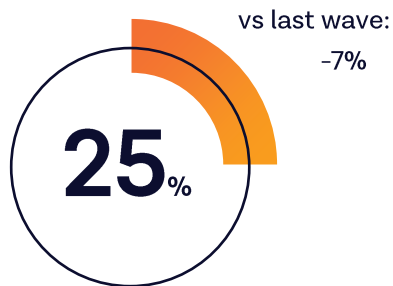
TRINITY  
MCQUEEN

# Three fifths of NW respondents were aware that NW is part of the Northumbrian Water group

## North East

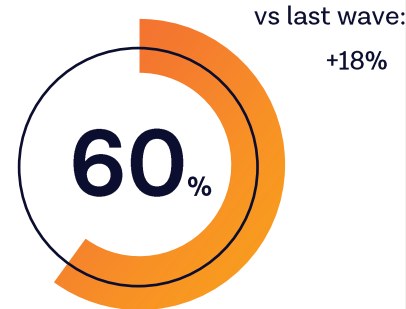


Have seen the  
NWG logo before



Knew the correct  
meaning of NWG

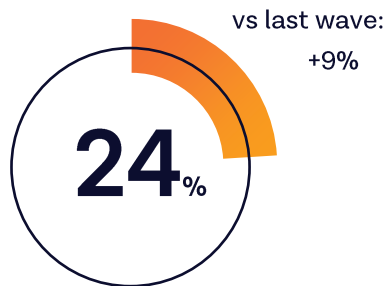
**19%** Didn't know what  
NWG stood for -9%



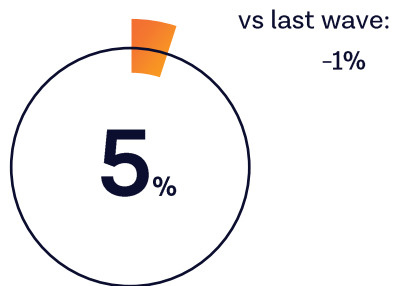
Are aware that NW is  
part of the Northumbrian  
Water Group

# Around a quarter recall seeing the NWG logo before

## Essex/Suffolk

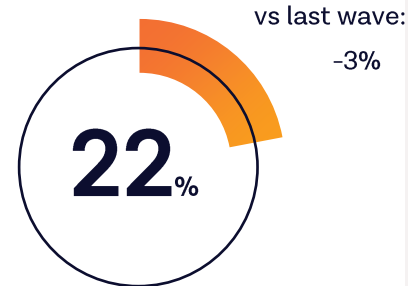


Have seen the  
NWG logo before



Knew the correct  
meaning of NWG

35% Didn't know what  
NWG stood for -14%



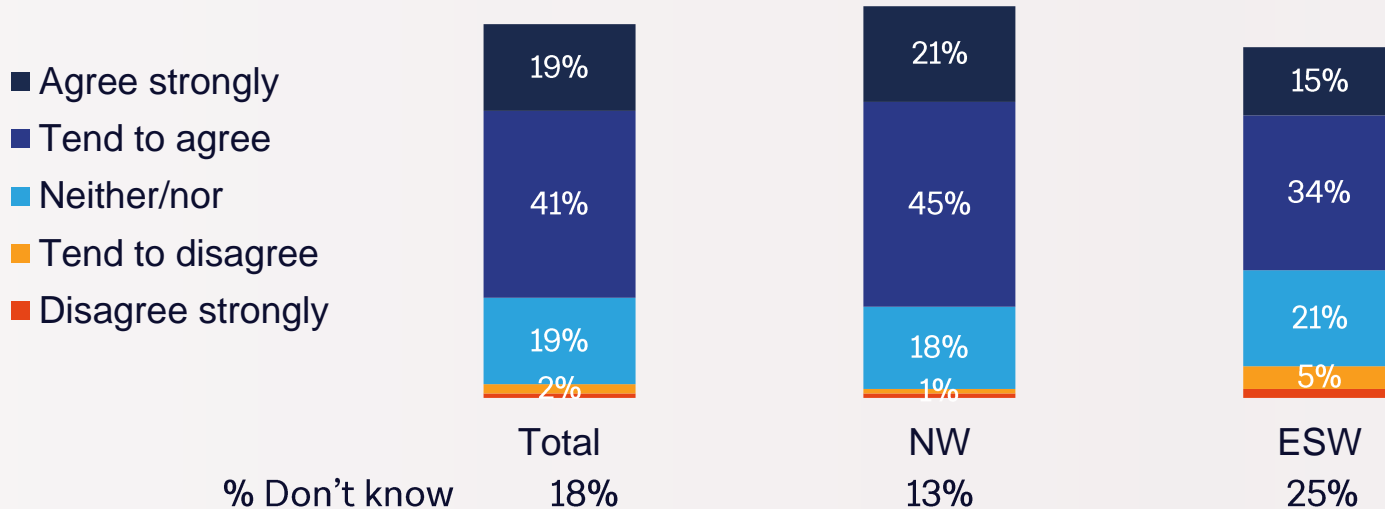
Are aware that ESW is  
part of the Northumbrian  
Water Group



# Business values and principles

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

NW/ESW is a company with good business principles and values

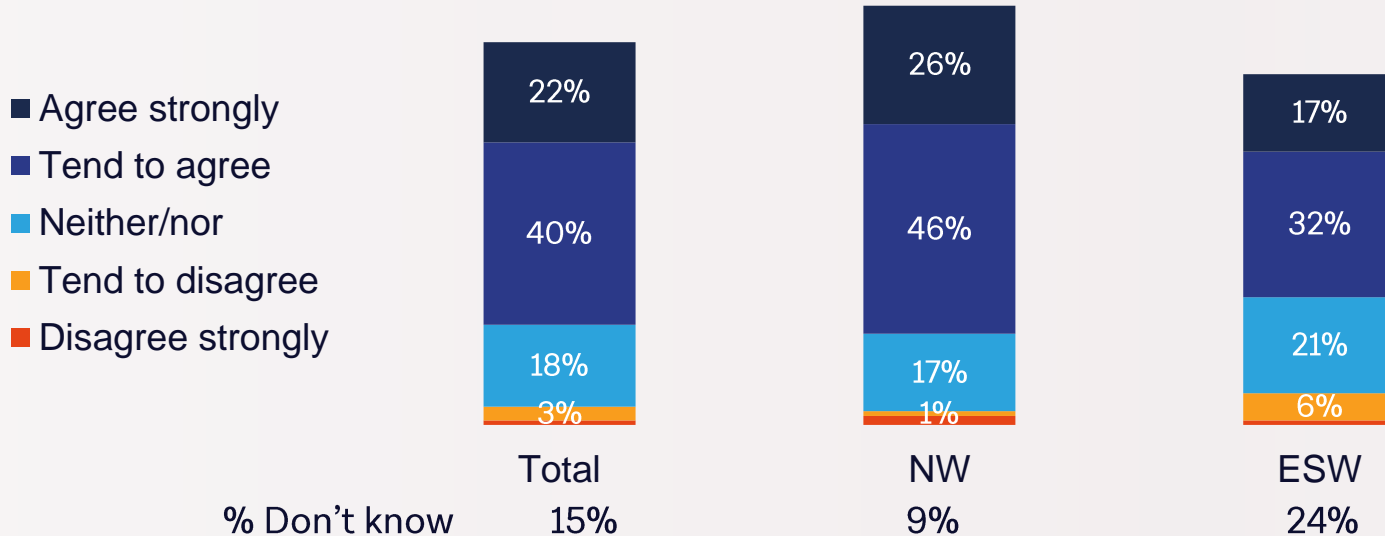


Those aged 18-54, and C1 are more likely to agree with this statement

# Business values and principles

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

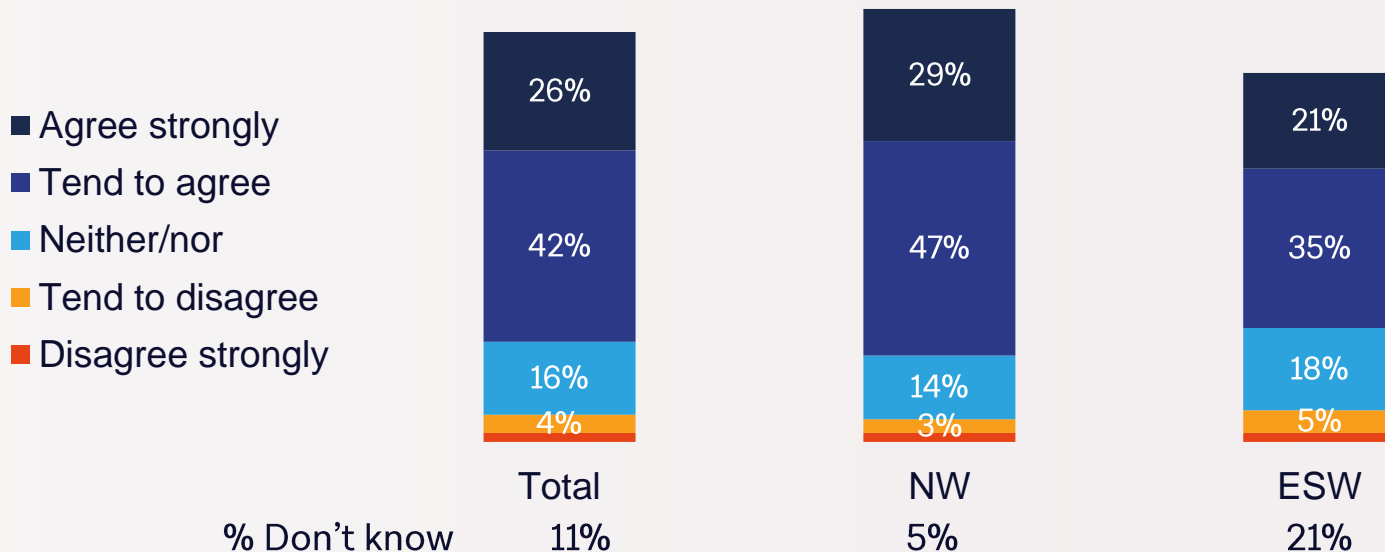
NW/ESW... cares for the essential needs of its communities and environment, now and for generations to come



# Business values and principles

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

NW/ESW...provide reliable and affordable water [NW: and wastewater] services for its customers

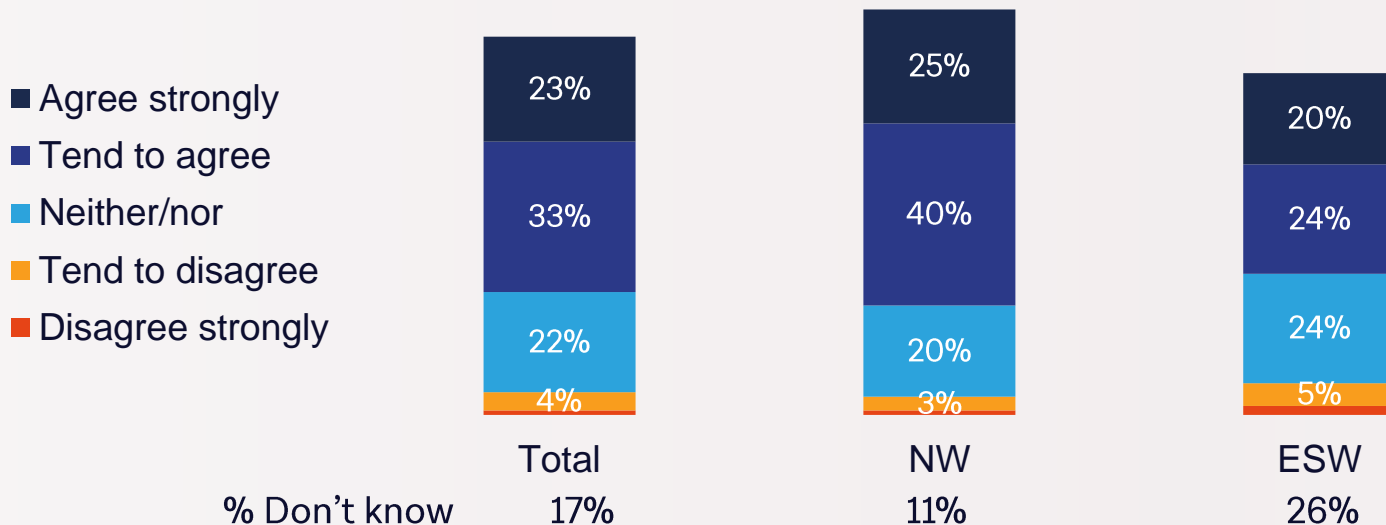


Q8a. NW/ESW...provide reliable and affordable water [NW: and wastewater] services for its customers. Base: All respondents (500), NW Region (300), ESW Region (200)

# Business values and principles

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

NW/ESW... make a positive difference by operating efficiently and investing prudently, to maintain a sustainable and resilient business







# Value of water

**NWG**  
*living water*

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

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

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







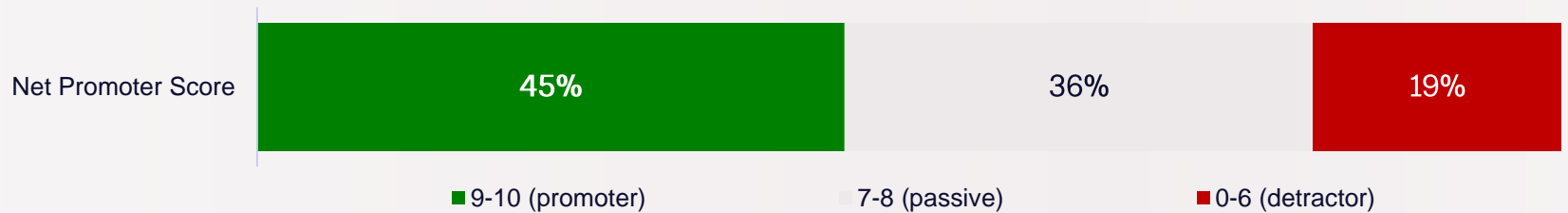
# Key metrics

**NWG**  
*living water*

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

# NPS

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



NPS: +26.4  
(-12.9 vs. last wave)

Higher among 35-54s, women, those in the North East, and who visited a leisure site



# Top 5 reasons for NPS scores

## Promoters 9-10s (156)

1. Good service/customer service – 26%
2. Had no problems – 22%
3. Good company/good in general/very good – 14%
4. Good water quality – 14%
5. Reliable/trustworthy/transparent/honest – 12%

Nothing to compare against/no choice/no real dealings – 3%

## Passives 7-8s (124)

1. No problems – 18%
2. Good service/customer service – 15%
3. No supply problems/ensure reserves for summer – 11%
4. Good company/good in general/very good – 11%
5. Expensive/depends on price – 10%

Nothing to compare against/no choice/no real dealings – 10%

## Detractors 0-6 (65)

1. Expensive/depends on price – 15%
2. Ok/fine/satisfied – 11%
3. No better/worse than any other supplier/it's just a water company – 9%
4. Poor water quality – 8%
5. Don't do enough for the environment – river care etc – 5%

Nothing to compare against/no choice/no real dealings – 31%



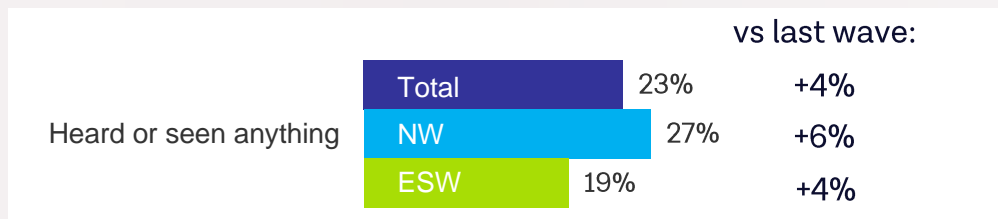
# Unprompted campaign awareness

**NWG**  
*living water*

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

# Just under a fifth spontaneously recall any NWG activity

*Apart from your water bill, can you think of anything you have seen or heard from, or about, NW/ESW, in the last 6 months or so?*



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

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





Just Add Water

**NWG**  
*living water*

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



# Stimulus

Participants were shown two images and then asked a number of questions on them:

NW

Making every penny count



ESW



Quality matters

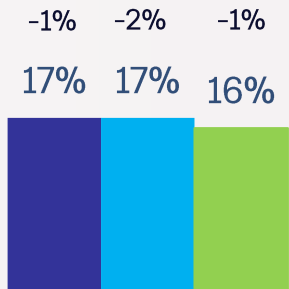


# Under one in five recall seeing either of these images

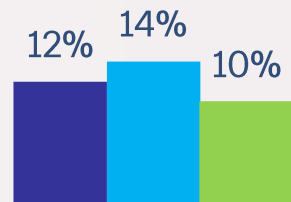
Do you recall seeing either of these, before today?  
(both images shown, with 'yes'/'no' for each)

■ Total ■ NW ■ ESW

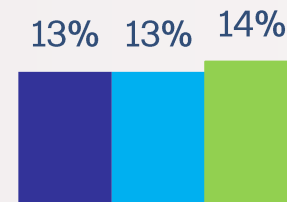
vs last wave:



Seen this before  
(either image)



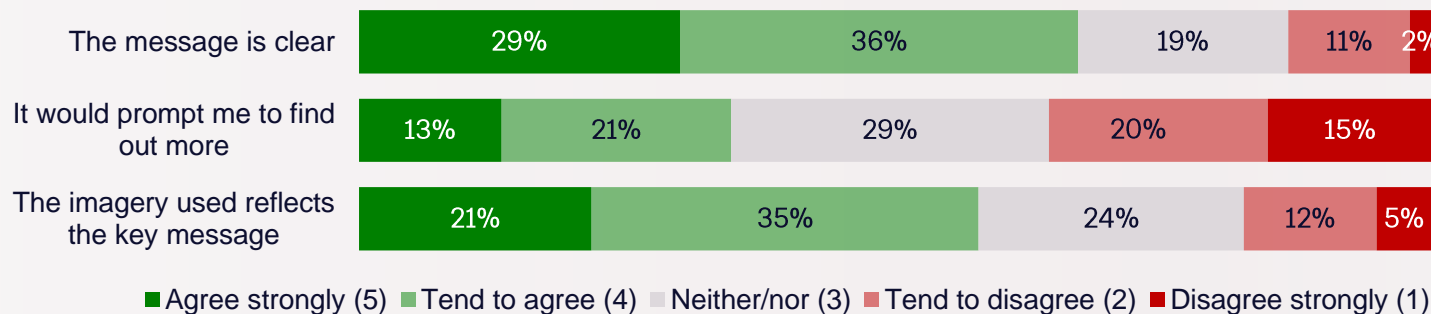
Seen Making  
every penny count



Seen Quality  
matters

# Over half agree the message is clear, with the imagery used also seen to be reflective of the main message

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



- 45-54s and C1s are more likely to agree with the statement “The message is clear”
- 18-34s and C1s more likely to agree with “It would prompt me to find out more”
- 18-54s more likely to agree with “The imagery used reflects the key message”

# Main message of the Just Add Water ads

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

	Total
Water/they provide water/a water company	15%
Implies water is clean and safe/quality water/fresh	13%
Highlights how important water is/sensible	11%
Cheaper water/saving money/not wasting water	10%
Encourages people to drink more water/stay hydrated	5%
For all generations/for everyone	4%
Confusing/don't know what it means	4%
Making/drinking – tea, coffee etc	4%
Reliable supply/always there	3%
Quality service/good service	3%
Just add water	3%
Promoting the brand	3%
Ways to contact/interact with the company	2%
Always there to help/support customers	2%
Implies they are a good company/established	1%



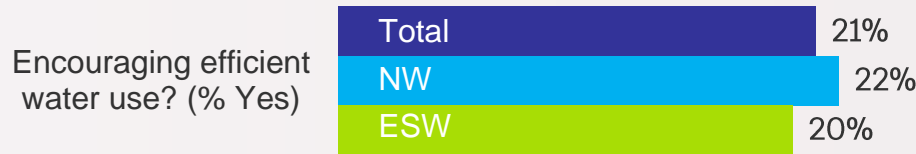
# Water resilience

**NWG**  
*living water*

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

# Around one fifth recall NWG encouraging them to be efficient with their water use

*Have you seen, heard or read anything from [NW/ESW], encouraging you to be efficient with your water use?*



**Those in Suffolk, and ABs are more likely to have seen, heard or read something from NW/ESW encouraging efficient water usage**



# Stimulus

Participants were shown three images and then asked a number of questions on them:

Not rinsing dishes before loading dishwasher

NW



ESW



Shower instead of bath

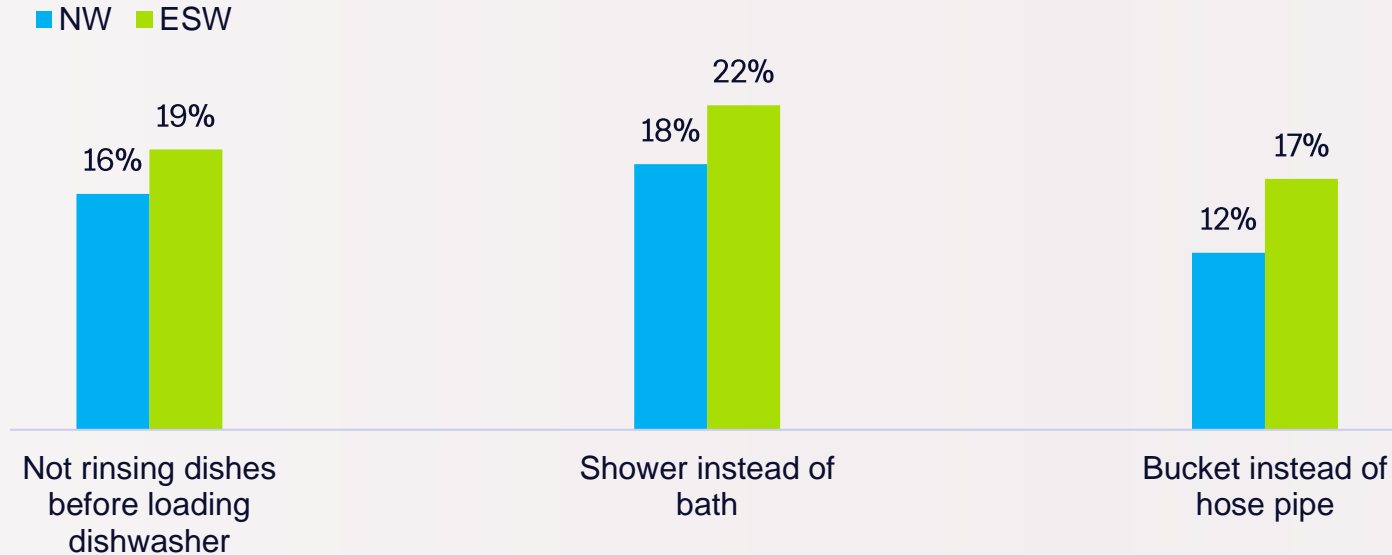


Bucket instead of hose pipe



# ESW respondents were more likely to recall seeing the campaign

Do you recall seeing anything about this campaign, before today? (% Yes)



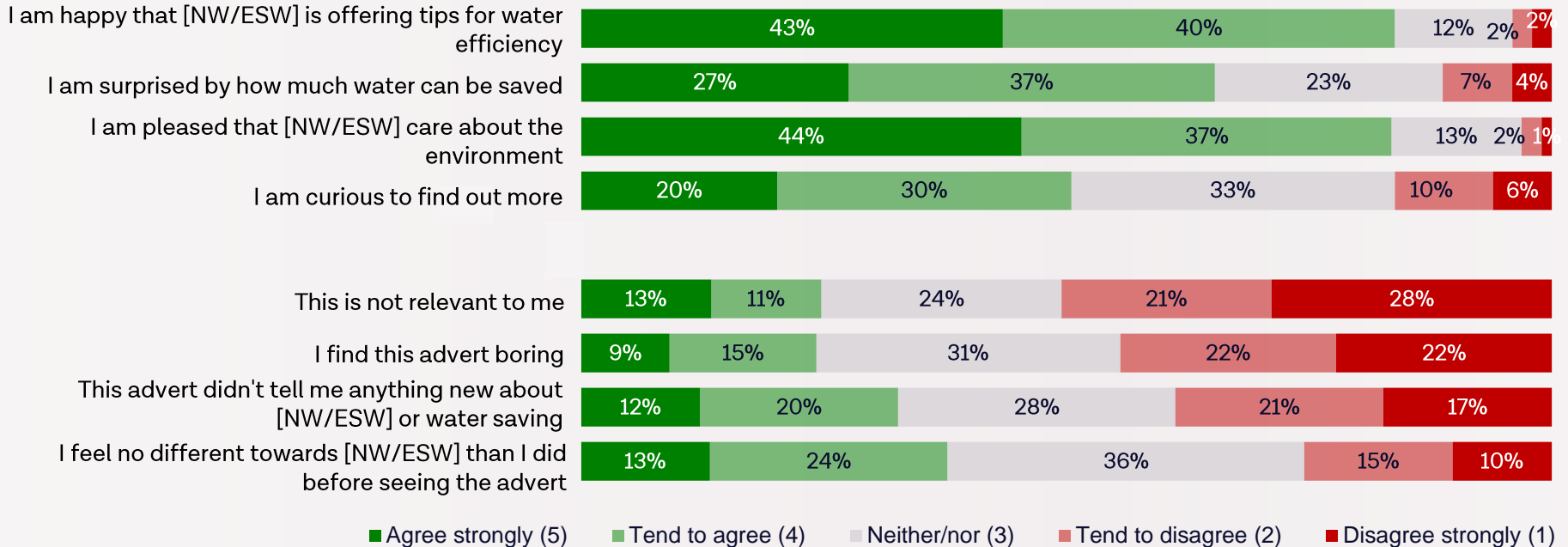
# Newspaper, T.V. and social media are typically the mediums which the campaigns are most seen

Where have you seen or heard about this?

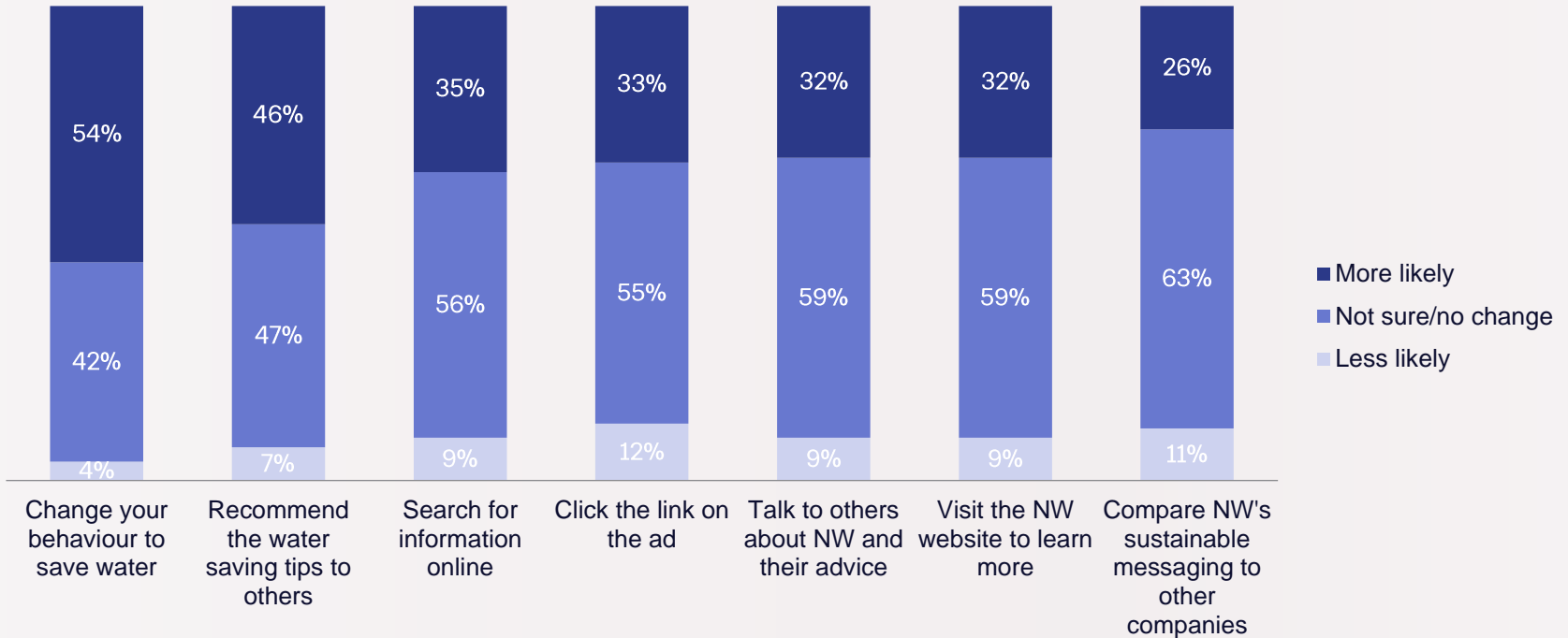
	Not rinsing dishes before loading dishwasher		Shower instead of bath		Bucket instead of hose pipe	
	NW	ESW	NW	ESW	NW	ESW
Newspaper	34%	24%	20%	20%	30%	15%
Magazine	17%	19%	18%	18%	24%	15%
Poster on bus stop/shelter	17%	5%	15%	16%	16%	12%
Poster on side of bus	13%	5%	11%	11%	8%	15%
Poster on roadside billboard	11%	11%	15%	14%	8%	6%
On their website	23%	16%	15%	11%	24%	15%
Social media	26%	27%	22%	25%	35%	30%
T.V.	26%	22%	25%	16%	27%	30%
Radio	11%	5%	13%	5%	16%	12%
In with the bill	17%	19%	20%	11%	14%	9%
Leaflet through the post/door	9%	5%	9%	11%	8%	0%
On a van	9%	3%	9%	5%	16%	6%
Train/metro	6%	5%	9%	5%	8%	0%
Email	15%	5%	11%	9%	16%	6%
SMS/text message	6%	3%	7%	2%	5%	3%
An ad on another website	4%	0%	7%	5%	5%	3%

# Four fifths claim to be happy that NWG is offering tips on water efficiency

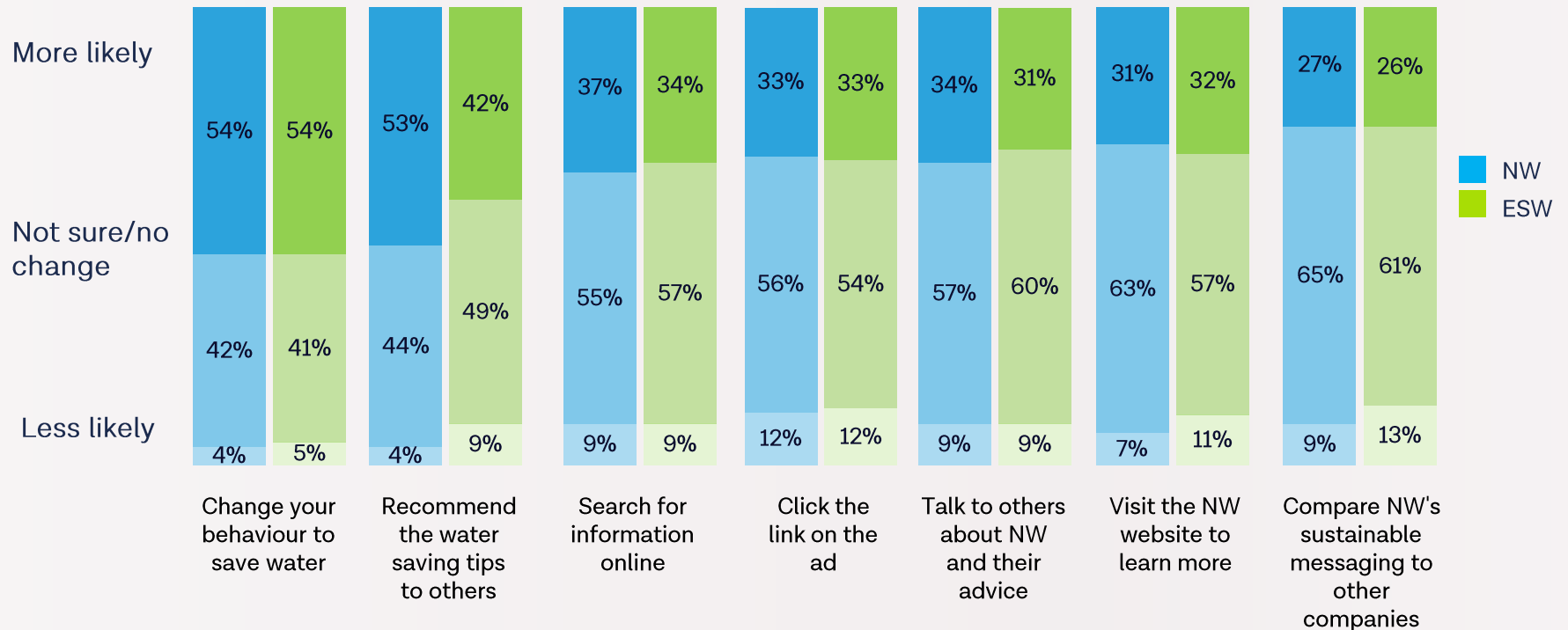
To what extent do you agree or disagree with the following statements...



# Half of respondents are more likely to change their behaviour to save water after seeing the ad



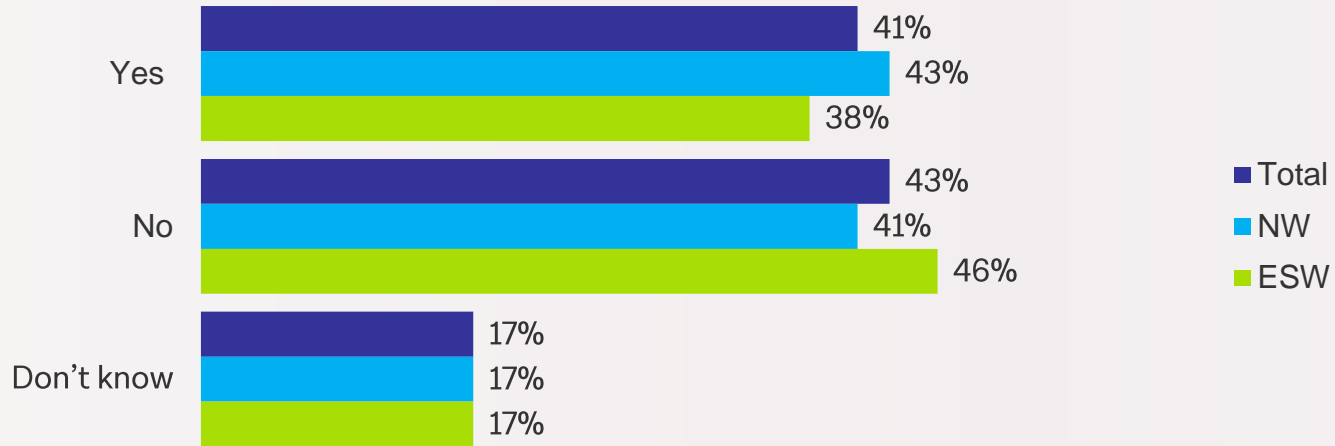
# The campaign is more likely to influence those in the NW region to recommend water saving tips





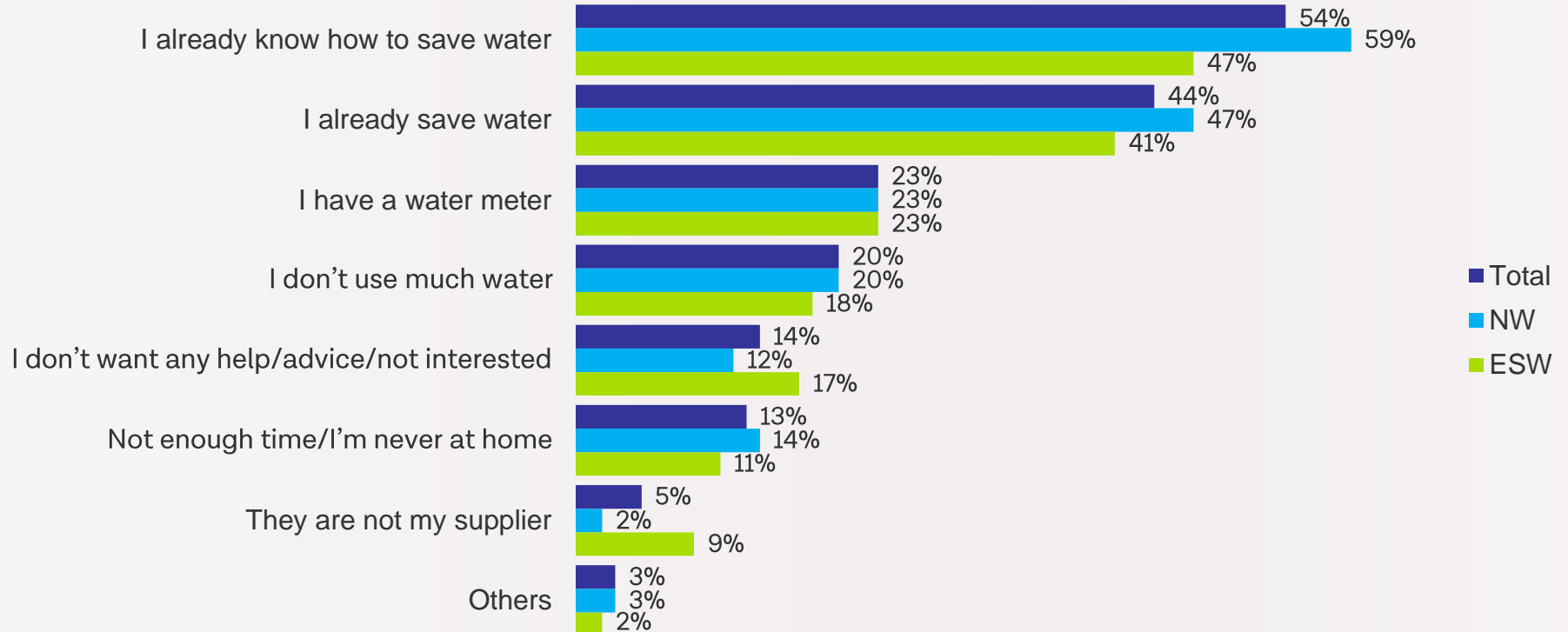
# Those in the NW region are more likely to be willing to take part in a free visit

*If [NW/ESW] offered you a free visit to your home to give advice on how you could save water would this be something you would be willing to take part in?*



# Over half of respondents already know how to save water, rising to 3 in 5 in the NW region

You said you would not be willing to take part in free home visits. Why is this?



Q57. You said you would not be willing to take part, why is this? Please select all that apply. Base: Those not willing to have a free home visit All respondents (214), NW Region (122), ESW Region (92)



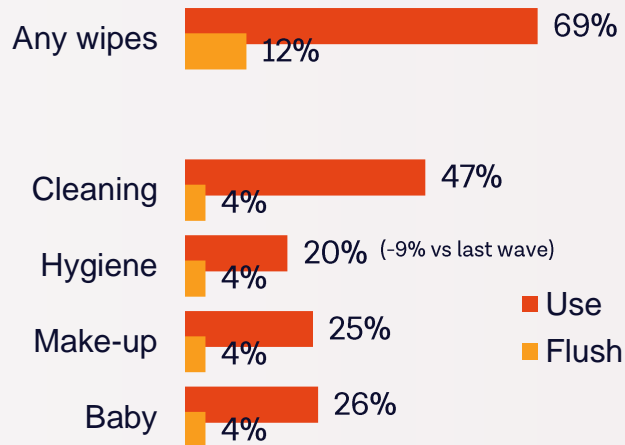
# Wastewater (NW region only)

**NWG**  
*living water*

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

# A large proportion use any wipes however only one in ten flush them down the toilet

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



35 consumers say they ever flush wipes.  
Why?

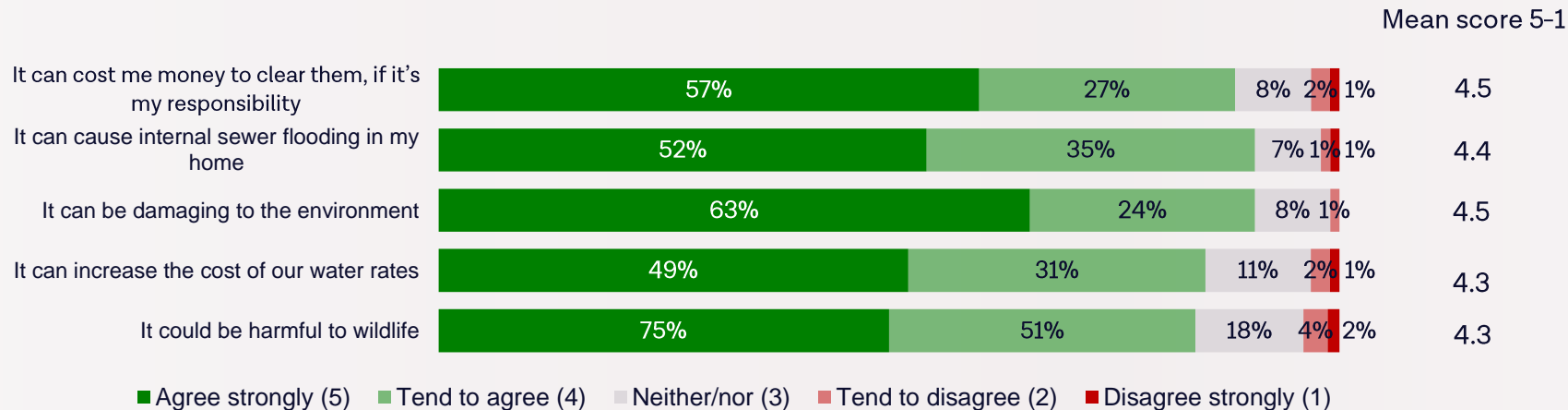
- Ease/convenience (54%)
- The packaging says they are flushable (46%)
- Don't have a bin in the bathroom (26%)
- More hygienic than putting in the bin (23%)
- They're small enough to flush (17%)
- Not aware of any reason not to (11%)
- They're just like toilet paper (9%)
- Other (9%)



# Similar to last wave, nearly all are aware flushing wipes causes blockages

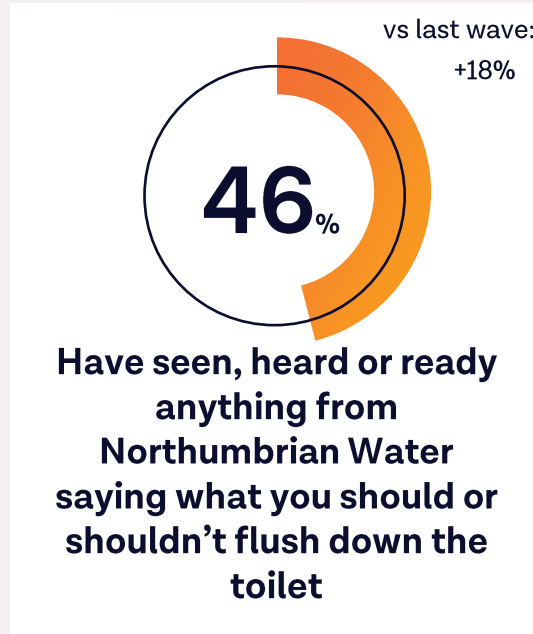
Are you aware that flushing wipes can cause blockages? **95%** vs last wave: **+1%**

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



Can be damaging to the environment – higher among women

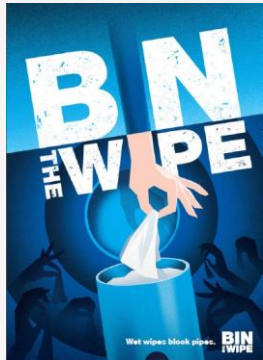
# Almost half have heard/seen from NWG about what not to flush down the toilet



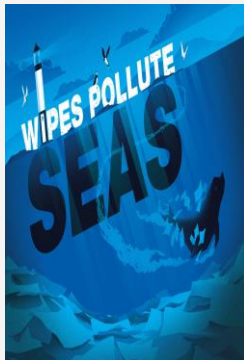
# The 'bin the wipe' campaign is the most recalled, with a third having seen or heard about it before

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

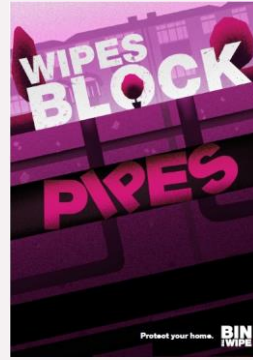
41% (any images)



34%



20%



20%



19%



17%



16%



14%

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

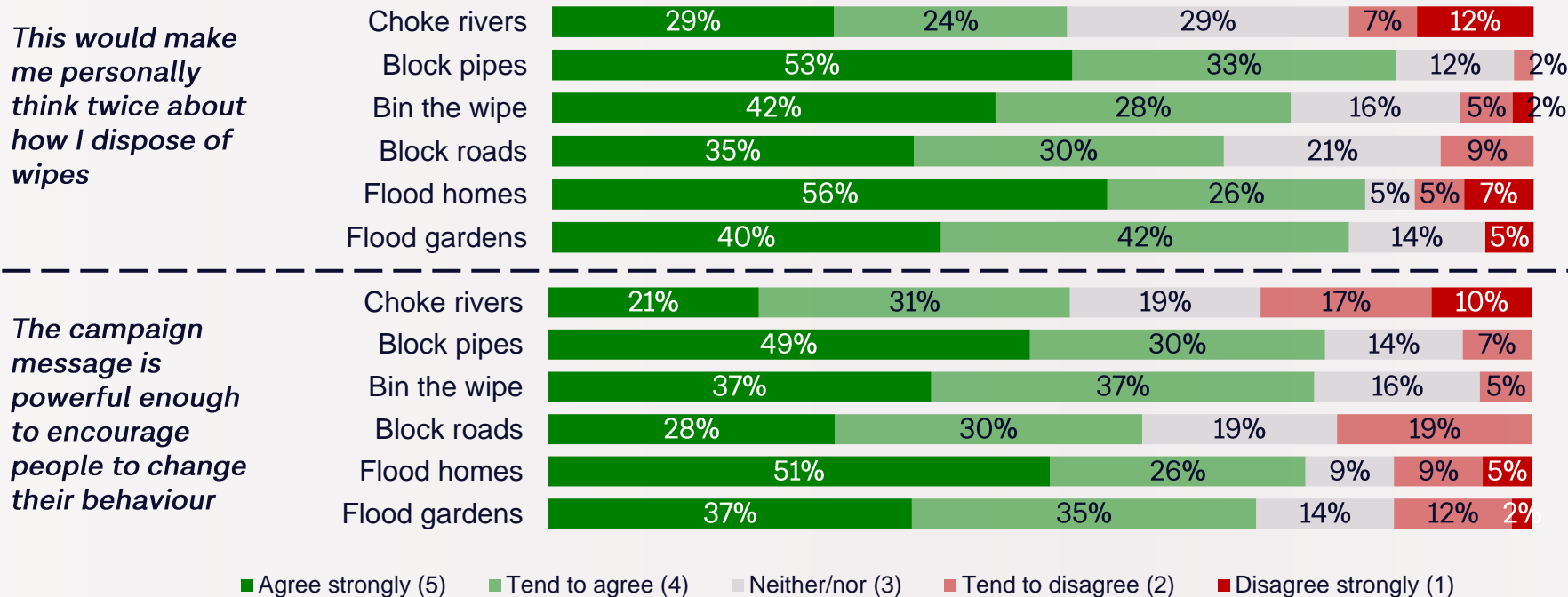
What is your first thought when you see this advert? (open)

	Bin the wipe	Block roads	Choke rivers	Block pipes	Flood homes	Flood gardens	Pollute seas
Don't flush wipes down the toilet/bin the wipe	33%	14%	5%	26%	28%	12%	5%
Easy to understand/clear/straight to the point/simple	14%	9%	7%	12%	9%	-	7%
Wipes etc block drains/effects of blockages/cause flooding	5%	12%	-	35%	16%	16%	-
Good/I like it/appealing	12%	-	2%	2%	2%	7%	7%
Impacts on the environment/pollution/fish/oceans/rivers/wildlife etc.	-	-	26%	-	-	-	30%
Unclear/not an obvious message	-	2%	5%	-	2%	5%	-
Great message/important/everybody needs to be made aware	2%	2%	-	-	2%	2%	2%
Striking/dramatic/bold/attention-grabbing/eye catching	7%	5%	-	5%	-	2%	-
Common sense	7%	-	5%	-	-	-	-
Scary/creepy/disturbing/alarming/worrying/shocking	-	2%	2%	2%	2%	-	-
Makes you stop and think/reconsider your choices	-	5%	-	-	-	-	5%



# Block pipes is the most effective message in encouraging change in behaviour

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





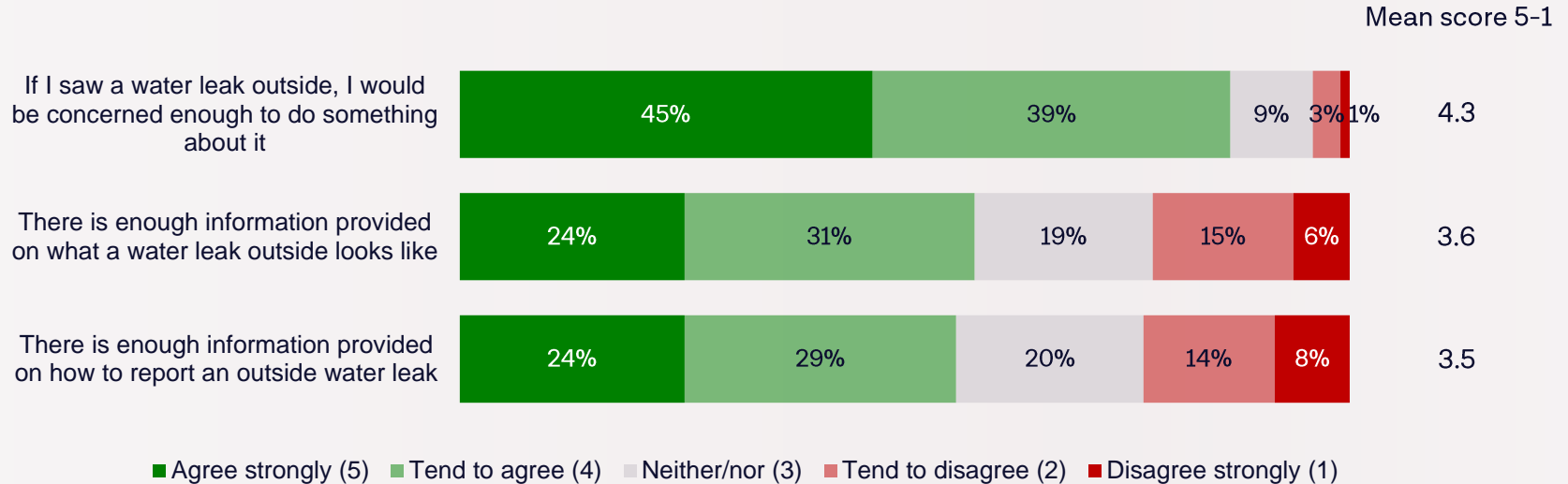
Leakage

**NWG**  
*living water*

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

# The majority would report a leak they see outside, but only half believe there is enough info on how to report it

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



**Would be concerned enough to do something – higher among 55+ and ABs**  
**Enough information provided on what a water leak outside looks like – higher among C1s**  
**Enough information provided on how to report an outside water leak – higher among males and 45–54s**

# Half said they would report a water leak to the water company

*What would you do if you saw a water leak on the road, path or in a public area? (open) (all other answers<5%)*

- Report it to water company (49%)
- Search online for who to report it to (37%)
- Report it to the council (19%)
- Nothing/ignore it (10%)
- Don't know (7%)

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



# Recall of any messaging is small, and has seen a slight decrease since last wave

*Have you seen, heard or read anything from NW/ESW about what to do if you saw a leak?*





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

*If you were going to report a leak to NW/ESW, how would you do it?*  
(open)

	Total	NW	ESW
Phone	58%	62%	52%
Email	25%	22%	30%
Webchat	12%	11%	14%
Twitter	7%	7%	6%
Facebook	5%	7%	3%
Look on website for how to do it	34%	35%	32%
Don't know	5%	2%	8%
Wouldn't do it	3%	4%	3%



# Leaking toilet

**NWG**  
*living water*

TRINITY  
MCQUEEN

# Free repairs for toilets was the biggest takeaway from this campaign



# Stimulus

Participants were shown one image and then asked a number of questions on them:

NW

**IS YOUR LOO COSTING YOU?**

**NORTHUMBRIAN WATER** *living water*

Hidden

Trickling

Flowing

The advertisement features three line-art icons of toilets. The top icon has a small circle on the top of the tank labeled 'Hidden'. The middle icon has a small circle on the side of the tank labeled 'Trickling'. The bottom icon has a large circle on the top of the tank labeled 'Flowing'.

**FREE LEAKING TOILET REPAIR FOR OUR CUSTOMERS!**

A leaky loo is easy to miss as the leak is not always obvious, and if you are on a water meter it'll be costing you money you'd rather have in your pocket.


Dual flush toilets about five years old or older often develop small leaks. Take these three simple checks on all your toilets:

1. Is water running constantly from the cistern into the pan?
2. Can you hear water continually running to refill the cistern?
3. Does the button on the top of your toilet stick in the down position when you flush?

If you find any of the above, we can fix your toilet completely free.

Visit [nwl.co.uk/leakyloos](http://nwl.co.uk/leakyloos) or call us free on **0800 953 0130** to make an appointment.

You can also scan the QR code below using the camera function on your smart phone to send us a video of your leaky loo and we'll come and fix it for free.



ESW

**IS YOUR LOO COSTING YOU?**

**ESSEX & SUFFOLK WATER** *living water*

Hidden

Trickling

Flowing

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Visit [eswater.co.uk/leakyloos](http://eswater.co.uk/leakyloos) or call us free on **0800 953 0130** to make an appointment.

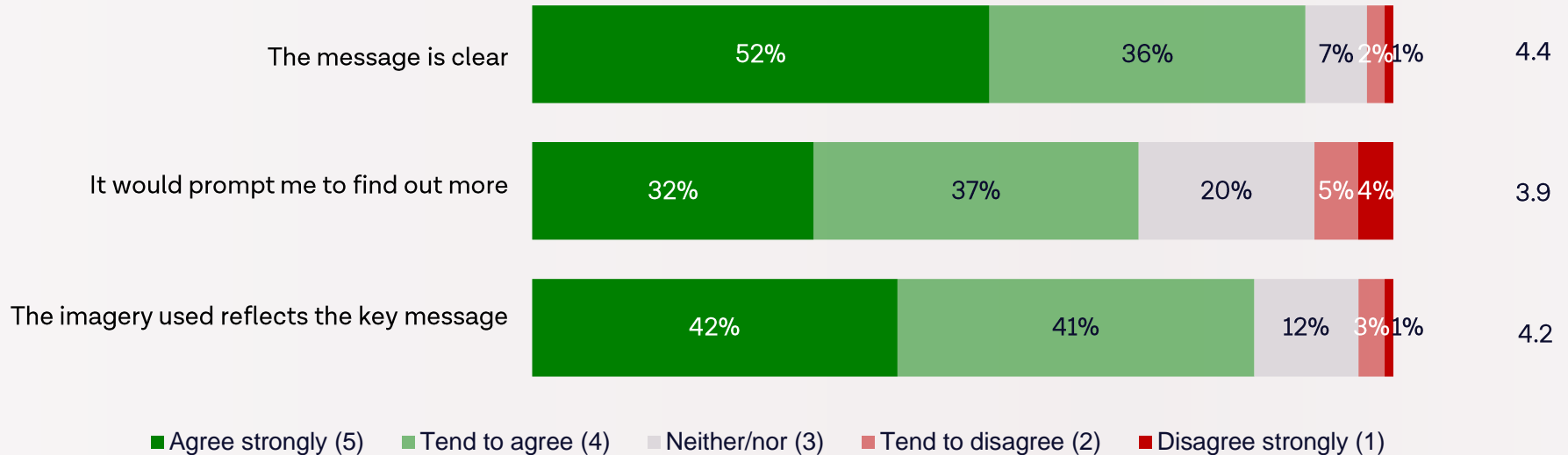
You can also scan the QR code below using the camera function on your smart phone to send us a video of your leaky loo and we'll come and fix it for free.



# The material shown is seen to be clear, with three fifths willing to find out more information

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

Mean score 5-1







# Smart Metering

**NWG**  
*living water*

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



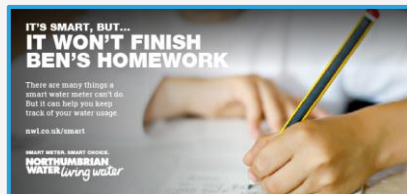
# Smart Metering means a monitor that shows your usage to a third of respondents

	Total	NW	ESW
Monitors/shows your usage/consumption	34%	34%	36%
Meter readings taken remotely	11%	10%	14%
Pay only for what you use	9%	10%	8%
Enables you to control water usage/save water	5%	5%	6%
Helps with budgeting/saving money	4%	5%	4%
Higher chargers/expensive	4%	5%	3%
Accurate billing	3%	3%	4%
Shows how much money you are spending	3%	3%	3%
It's a water meter/having a water meter	2%	1%	3%
Cheaper bills	1%	2%	1%
Can help identify leaks	1%	0%	2%
Other	11%	11%	12%
Don't know	11%	12%	11%

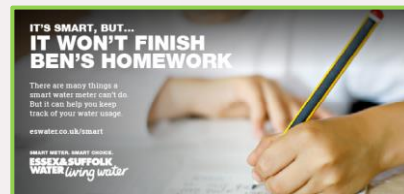
# Stimulus

Participants were shown one image and then asked a number of questions on them:

NW



ESW



# Monitoring water usage is thought to be the main message although there is some confusion

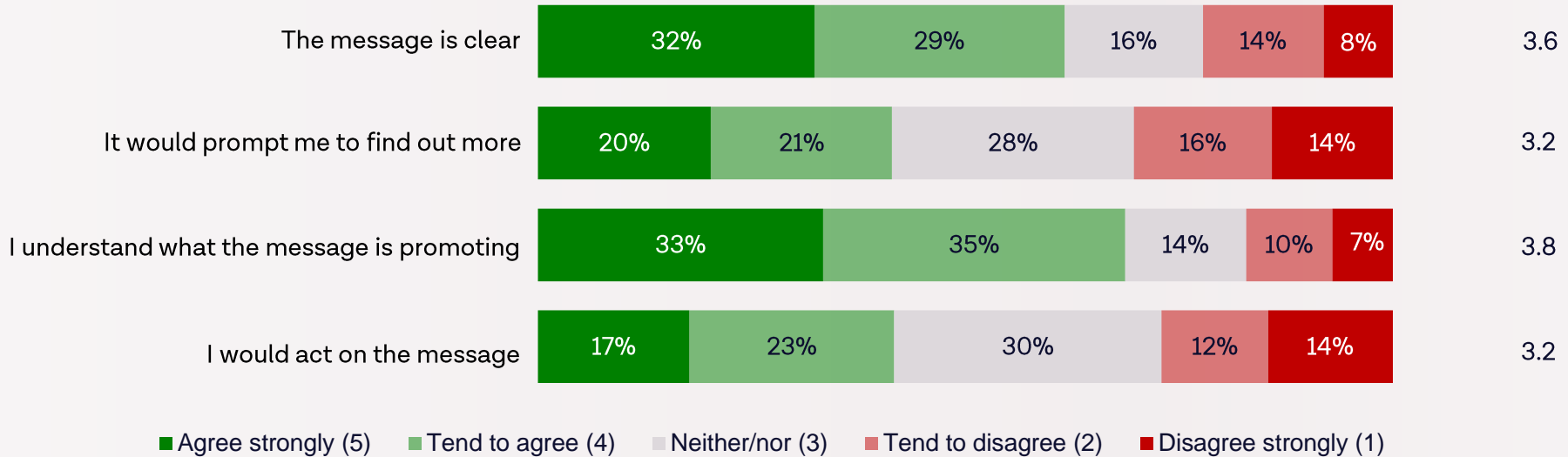
	Total	NW	ESW
Track/monitor your water usage	35%	34%	37%
It's smart but not that smart/what it can and can't do	8%	9%	8%
Get a smart meter	5%	4%	6%
Confusing/obscure/unclear message	5%	6%	3%
Information on how a smart meter can help	4%	4%	5%
Don't waste water/how to save water	3%	3%	4%
A smart meter can save money/lower bills	3%	3%	3%
Can help you control your water consumption better	2%	2%	2%
Good/great/like it	2%	2%	2%
Don't know/nothing	20%	22%	17%
Other	12%	12%	13%

Q61. Here's some examples of a new {NW/ESW} campaign what do you think is the main message that the campaign is trying to convey? Base: All respondents (500), NW Region (300), ESW Region (200)

# The majority did not feel that the campaign would change their behaviour

To what extent do you agree or disagree with the following statements about the campaign?

Mean score 5-1

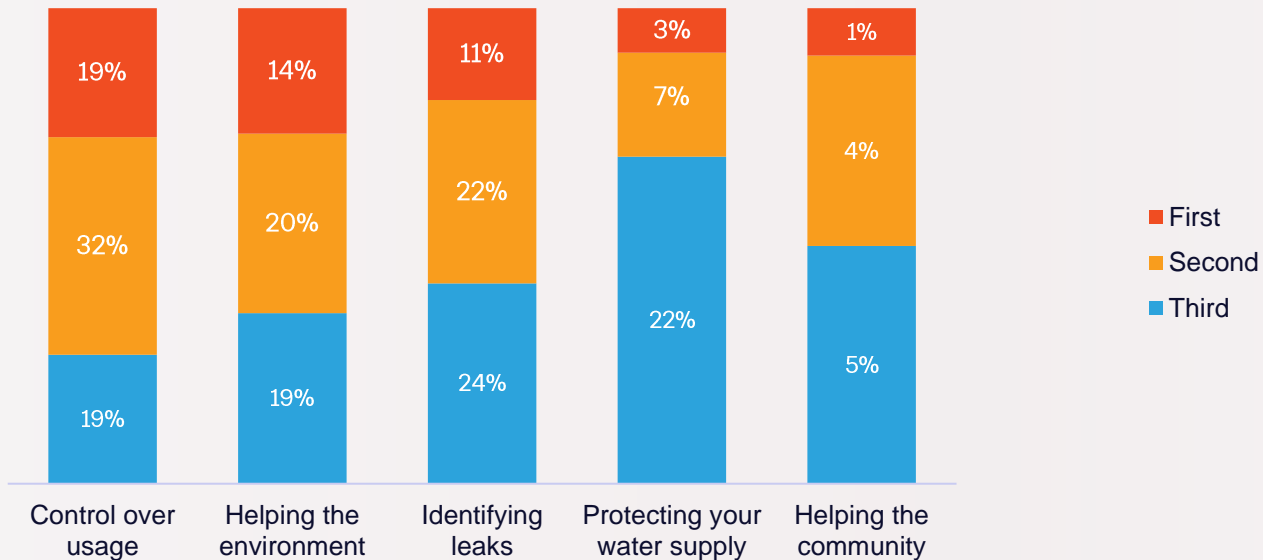


## Clearer information, more facts of the benefits of smart meters would improve the adverts

	Total	NW	ESW
Clearer information/message/more direct	14%	14%	13%
More facts/benefits from having a smart meter	7%	8%	6%
Better/relevant images/pictures - water based	5%	6%	3%
Show the smart meter/what it looks like (working)	3%	2%	5%
Include a cost comparison with and without a meter/how much you could save	3%	4%	3%
Give examples on how to save water/money - how we waste water/money	3%	3%	3%
Change everything/scrap it	3%	3%	3%
Enlarge text/lettering - make it more eye-catching	2%	1%	4%
Advertise more/include with the bills/social media	2%	2%	2%
Nothing/none	29%	26%	33%
Don't know	16%	18%	14%

# Control over usage is seen to be the largest benefit to having a smart water meter

From the following statements, which ones are the top three that you think are the most beneficial from having a smart water meter? Please rank them first, second and third.







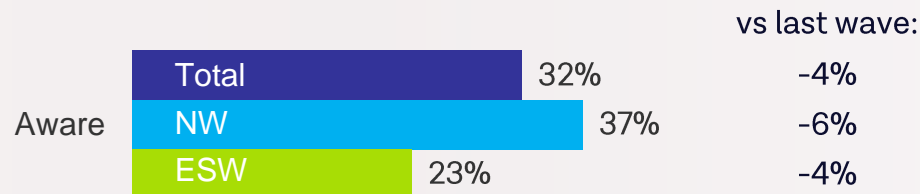
# Waterside Parks

**NWG**  
*living water*

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

# Around a third are aware of the NWG Waterside Parks

Are you aware that NW/ESW operates a series of Waterside Parks that are open to visitors, including Derwent, Fontburn and Hanningfield Waterside Parks and Kielder Waterside?



How did you hear about these Parks?

	Total (158)	NW (112)	ESW (46)
Word of mouth	51%	53%	46%
Facebook	17%	13%	28%
Internet search	15%	16%	13%
Twitter	13%	11%	20%
Instagram	12%	11%	15%
Waterside Parks UK website	11%	10%	13%
'This is Durham'	11%	13%	4%
Newspaper article	9%	8%	13%
Previously visited	4%	3%	9%
Local/nearby	3%	1%	7%

# There has been a slight decrease in the proportion of people visiting Waterside Parks in the past 12 months

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

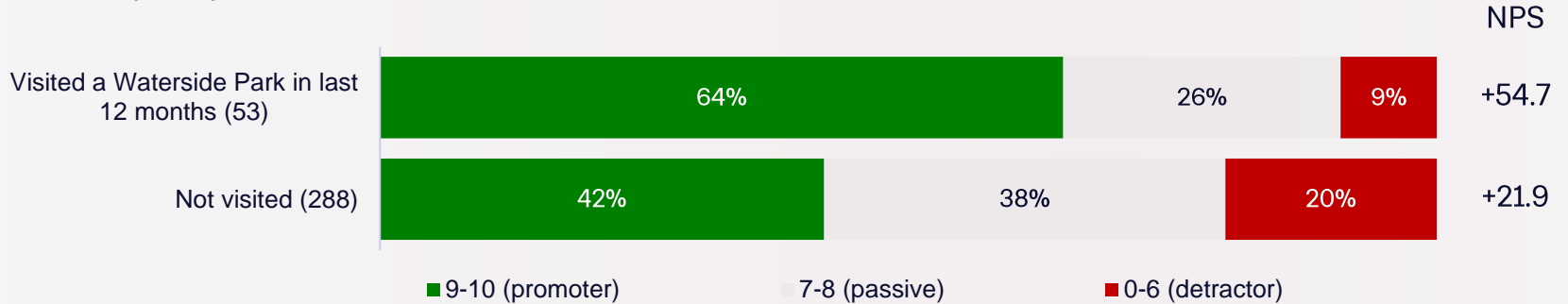


*Which one(s)? (All respondents)*

	Total	NW	ESW
Derwent	10%	9%	11%
Kielder	7%	9%	2%
Hanningfield	5%	4%	8%
Fontburn	5%	5%	5%

# Net Promoter Score – Waterside Parks visitors

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



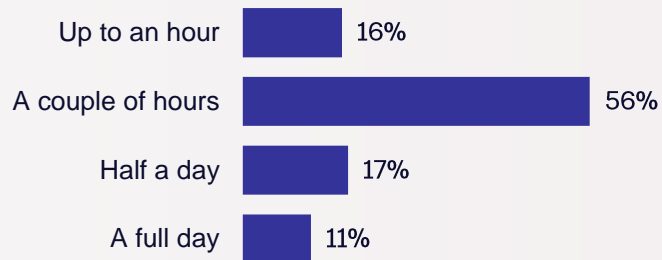
**NPS among Waterside Parks visitors:**  
+ 54.7

Visitors are significantly more likely to promote NWG

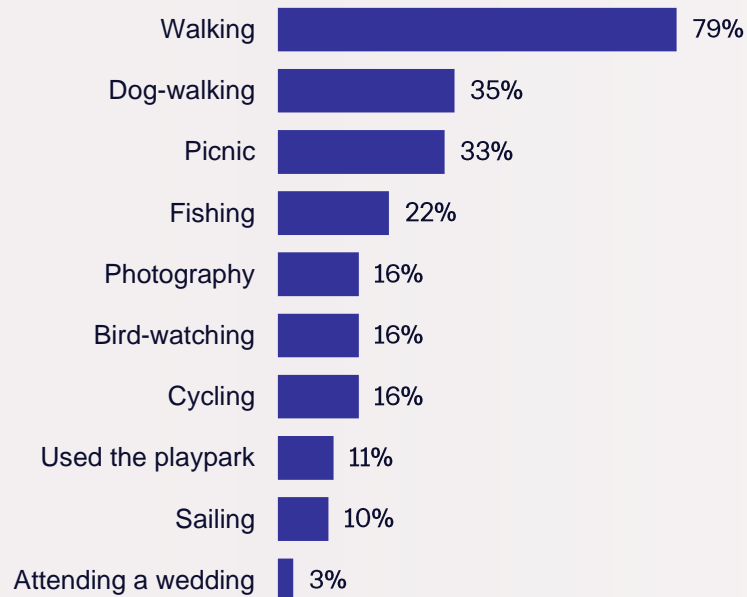
Q9a/40a. If people were able to choose their water and sewerage provider, how likely would you be to recommend [NW/ESW] to a friend or colleague? Please use a scale of 0-10, where 0 is 'not at all likely' and 10 is 'extremely likely' Have you visited any of these Waterside Parks in the last 12 months or so? Which one(s)? Base: Those who have visited a waterside park in the last 12 months (53), those who have not visited a waterside park (88)

# Motivations for visiting Waterside Parks (1)

*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?*



# Motivations for visiting Waterside Parks (2)

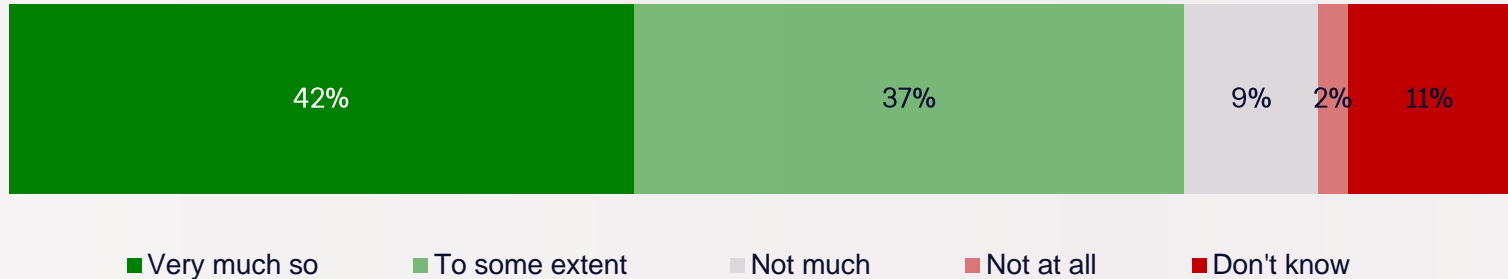
*What would encourage you to visit one of these parks? (open)*





# Nearly 4 in 5 agree that having public access to Waterside Parks is a good thing

*To what extent do you think that having the Waterside Parks available for the public to access is a good thing for [NW/ESW] to offer?*





# Website

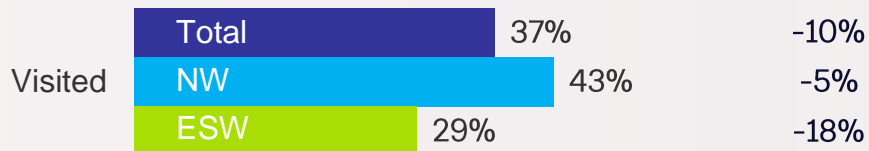
**NWG**  
*living water*

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

# Visiting the website

Have you ever visited the NW/ESW website?

vs last wave:



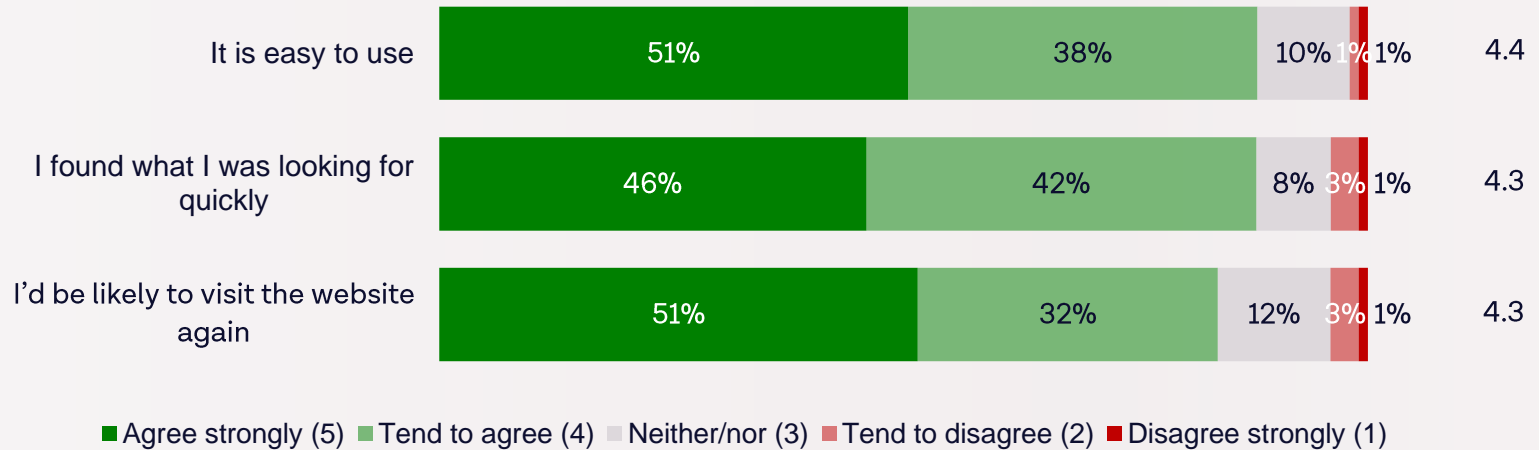
What were you looking for? (Those who visited the website)

	Total	NW	ESW
To check your account	59%	60%	56%
To pay a bill	32%	32%	32%
For information on, or to get, a water meter	18%	19%	16%
To change address/moving house	14%	13%	16%
To set up / change/cancel a direct debit	14%	15%	12%
To find a contact number/email address	12%	11%	16%
To register for e-billing	11%	12%	11%
For information on water saving, or to get a water saving device	11%	12%	9%
For information on prices/tariffs	10%	11%	7%
To download the app	9%	10%	7%
For information on works being carried out	9%	8%	11%
To report a water supply/quality issue	9%	8%	11%
For information on their leisure sites	6%	5%	7%
To report a leak	5%	5%	7%

# Nearly all agree the website is easy to use

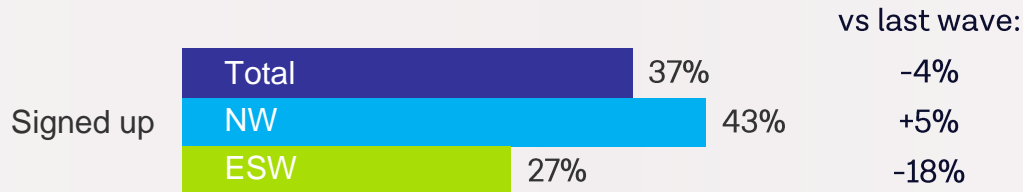
Please tell me to what extent you agree or disagree with the following statements, about the website:

Mean score 5-1



# E-billing sign-up

Are you signed up for e-billing with NW/ESW?



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

	Total	NW	ESW
No reason not to – would consider e-billing	35%	29%	41%
Prefer paper bills	28%	34%	21%
With another water company	11%	5%	17%
Don't know how it works	8%	8%	9%
Get too many emails	7%	10%	5%
Concerned about online security/privacy	7%	9%	5%
I don't pay our water bills	6%	7%	5%
Water bill included in rent/not bill payer	3%	5%	1%



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

# Priority Services

**NWG**  
*living water*

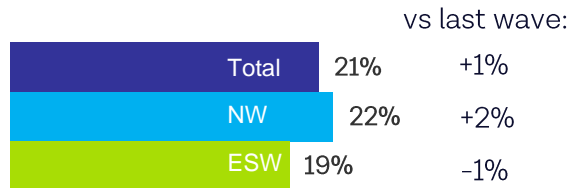
**T R I N I T Y**  
**M C Q U E E N**



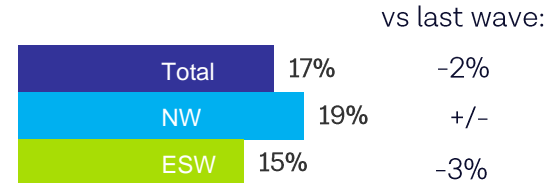
# A fifth recall seeing, hearing or reading about how NWG helps people who may be struggling to pay their water bills

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?



...need extra support in other ways?



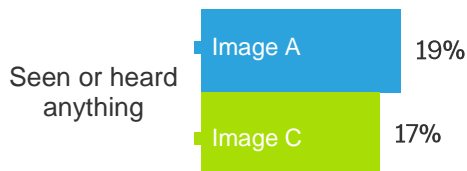
# Nearly 1 in 5 recall seeing the campaign, with the newspaper being the most recalled channel

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

Image A (NW)



Image C (ESW)



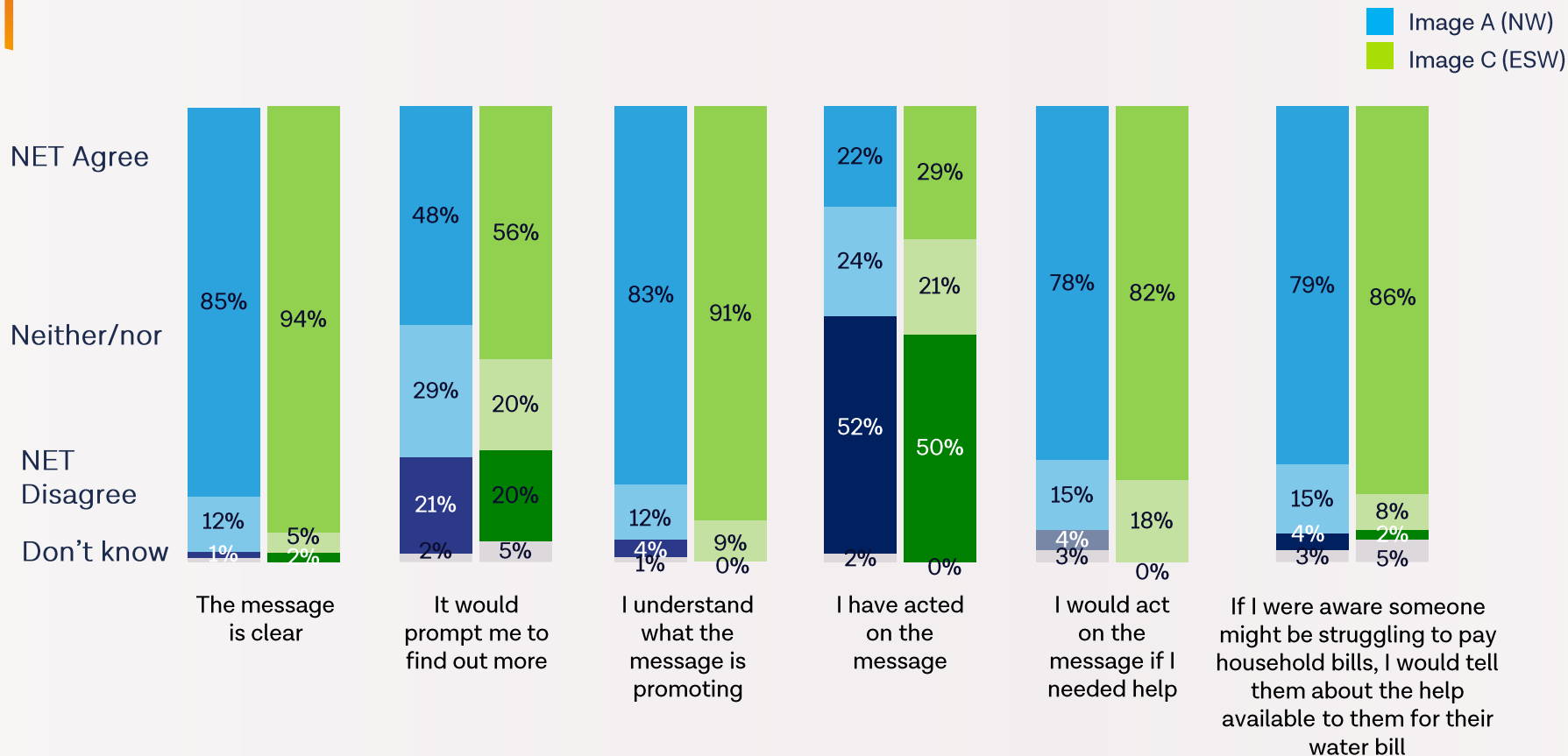
Where have you seen or heard about this?

	Image A (NW)	Image C (ESW)
Newspaper	27%	33%
Social media	23%	30%
TV	25%	30%
In with the bill	18%	15%
On their website	20%	18%
Magazine	20%	18%
Radio	20%	6%
Email	9%	12%

Q45a. Here is an example of the campaign materials. Do you recall seeing or hearing anything about this, before today? Base: NW Region (300), ESW Region (200).

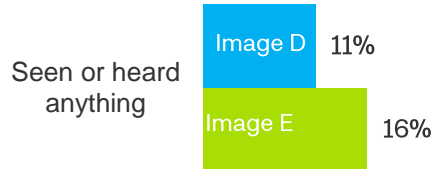
Q45b. Where have you seen or heard about this? Base: NW Region (56), ESW Region (33)

# While the message is clear, few have yet to act on it



# Only 1 in 10 recall seeing image D, while more recall seeing Image E

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



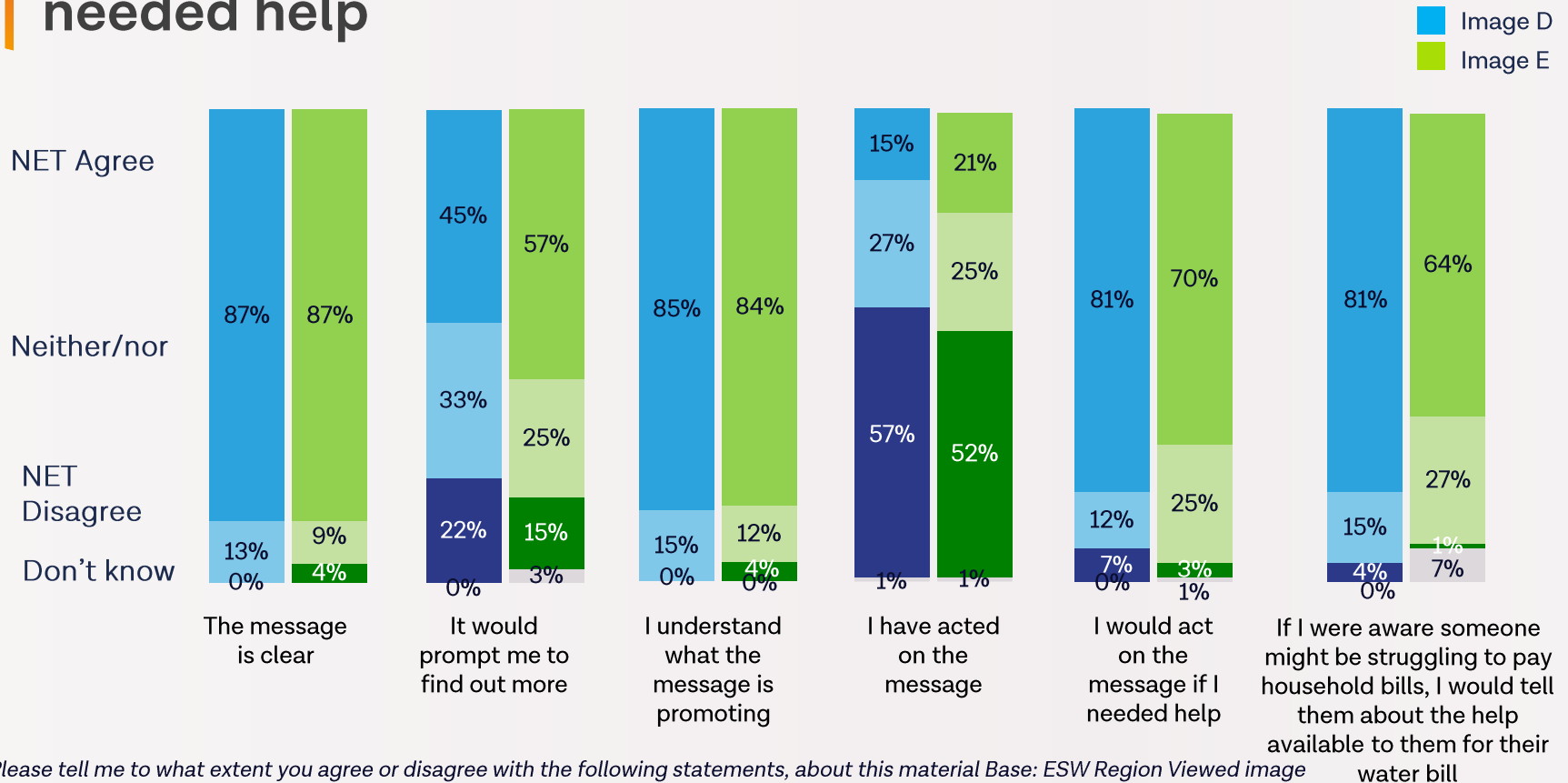
Where have you seen or heard about this?

	Image D	Image E
Newspaper	27%	19%
Social media	36%	32%
TV	36%	19%
In with the bill	27%	35%
On their website	9%	32%
Magazine	27%	13%
Radio	5%	6%
Email	14%	0%

Q45a. Here is an example of the campaign materials. Do you recall seeing or hearing anything about this, before today? Base: ESW Region (200).

Q45b. Where have you seen or heard about this? Base: ESW Region 'pension' (22), ESW Region 'water bill' (31)

# A large proportion would act on the message if they needed help

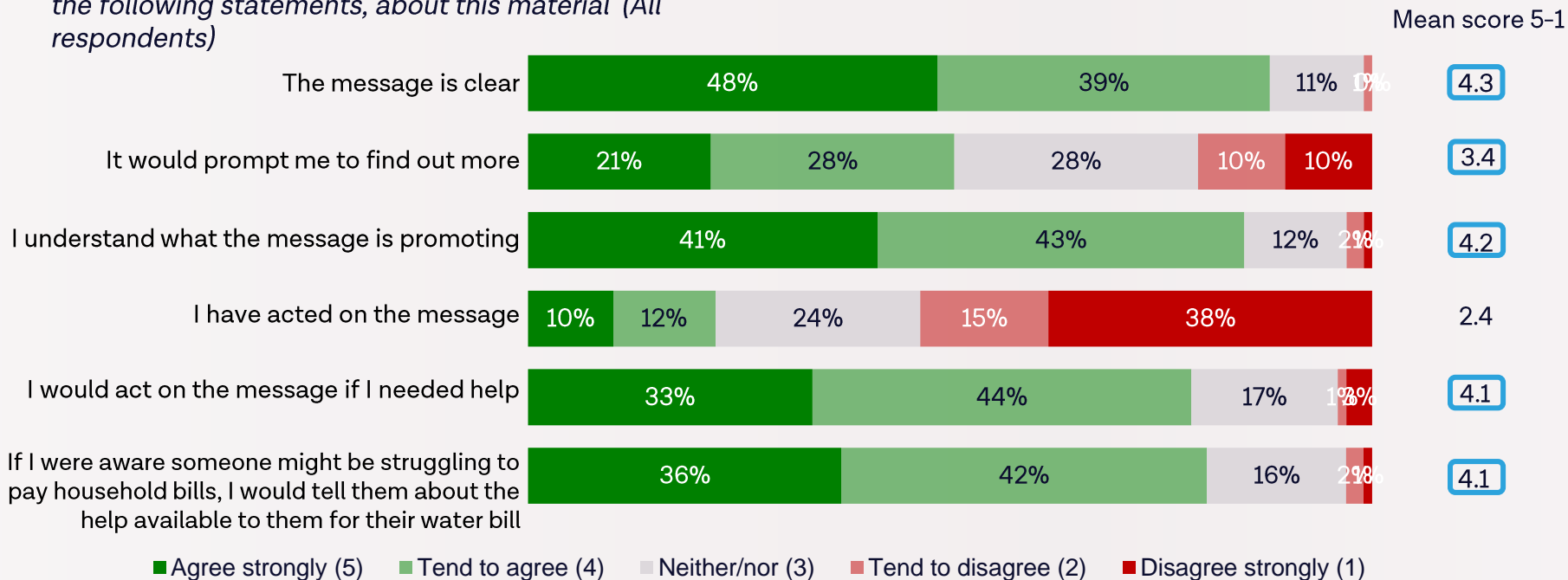


Q46. Please tell me to what extent you agree or disagree with the following statements, about this material Base: ESW Region Viewed image 10d (67) and 10e (67) at Q46

# While few have acted on the message, a large proportion would if they needed help

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

   = increase vs last wave







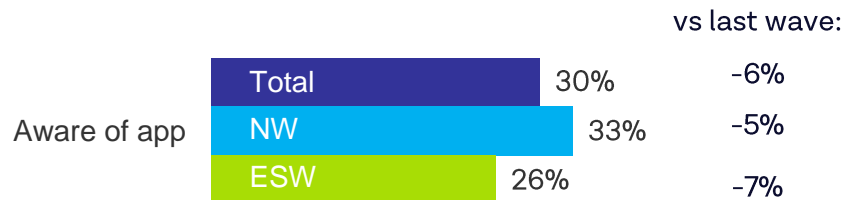
The app

**NWG**  
*living water*

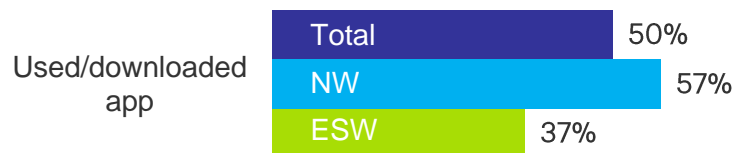
**T R I N I T Y**  
M Q U E E N

# Awareness of the app has decreased from the last wave

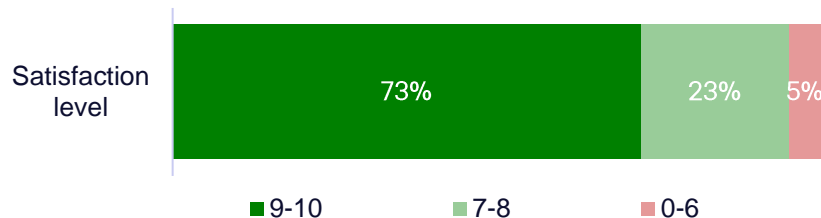
Did you know that NW/ESW has an app, to manage your account?



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



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



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

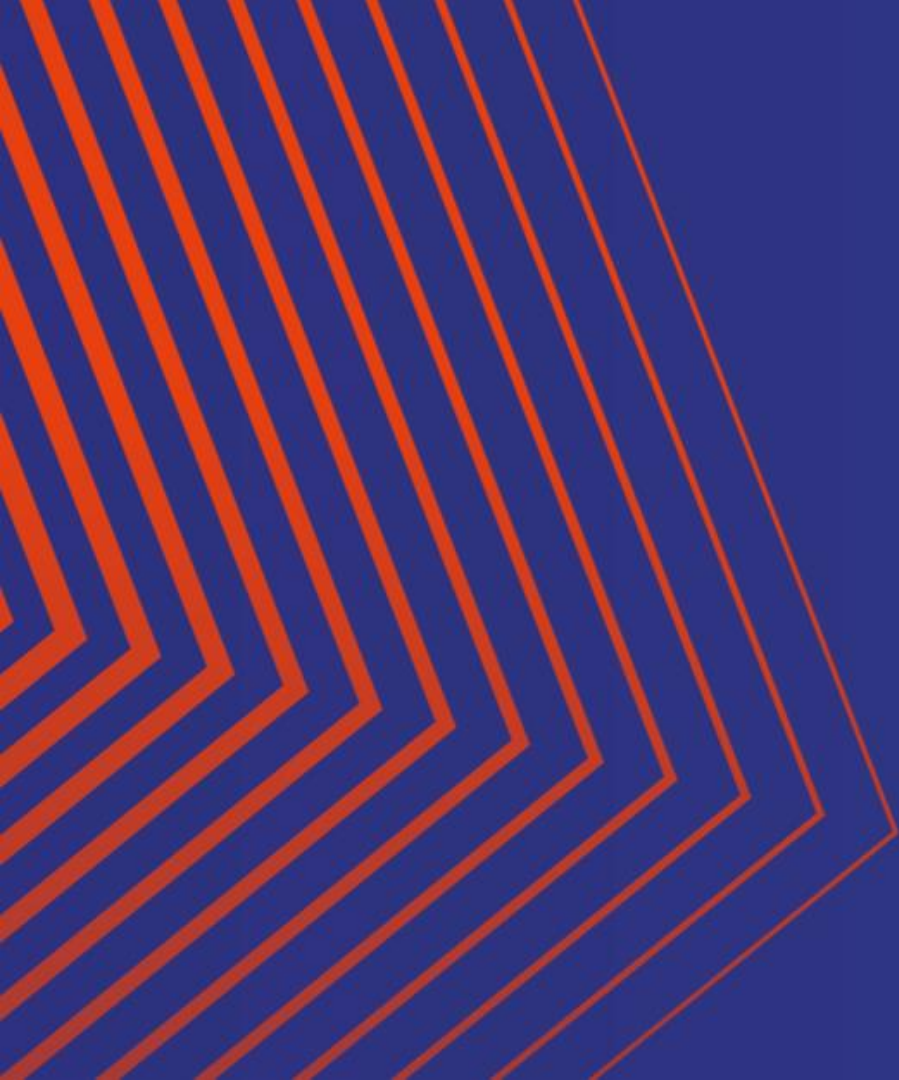
Nothing/don't know	68%
More services available	4%
Needs modernising	3%
Easier to use/navigate	3%
Rewards	1%
Receive up to date information	1%
Ease of contact/communication	1%

Q47aa. Did you know that [NW/ESW] has an app, to manage your account Base: All respondents (500) Q47a. Have you used or downloaded the app? Base: All those aware of the app (149). Q47b. Using a scale of 10 to 0, where 10 is very satisfied and 0 is very dissatisfied, how satisfied are you with the app? Q47c. What else, if anything, would you like to see in the app? Base: All those who use the app (75)

## 6% state providing an incentive or discount could encourage customers to use an app

Is there anything that might encourage you to use an app from NW/ESW?

Nothing – 38%  
Don't know – 8%  
See water usage/costs – 7%  
Incentive/discount/reduced bills – 6%  
View bill/account – 3%  
More information about it/invite to join – 3%  
Water saving information – 2%



TRINITY  
MCQUEEN