

Six month review awareness omnibus

NWG

October 2022

Contents

Introduction	3
Demographics	4-5
Brand	6-12
Unprompted campaign awareness	13-14
Just Add Water	15-17
Water resilience	18-27
Wastewater (NE only)	28-30
Leakage	31-35
Leaking toilet	36-39
Smart metering	40-46
Waterside Parks	47-49
Website	50-52
Priority Services	53-59
The app	60-61
Flo awareness	62-64



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: 20th September – 27th September 2022

Average interview length: 14 min, 30 seconds

Location	Interviews
North	301
Essex	150
Suffolk	50
TOTAL	501

Covering, this wave:

- Recall of Flo the engagement vehicle
- Recall of Just Add Water activity
- 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

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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	501	301	200
Male	247	150	97
Female	254	151	103
18-34	124	72	52
35-44	75	49	26
45-54	93	53	40
55-64	84	50	34
65+	125	77	48
AB	143	86	57
C1C2	218	131	87
DE	140	84	56



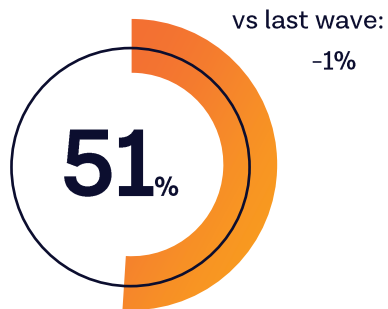
Brand

NWG
living water

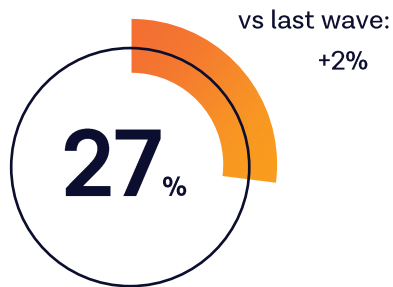
T R I N I T Y
M C Q U E E N

Half of Northumbrian Water customers had seen the logo before and were aware that it is part of NWG

North East

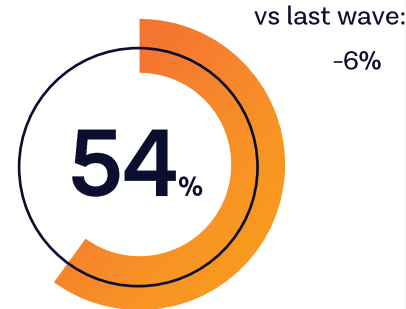


Have seen the NWG logo before



Knew the correct meaning of NWG

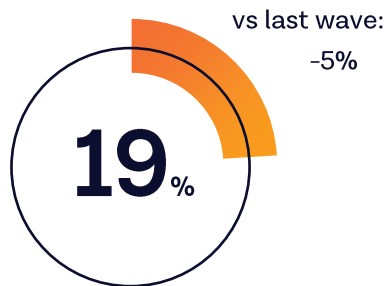
19% Didn't know what NWG stood for +/-%



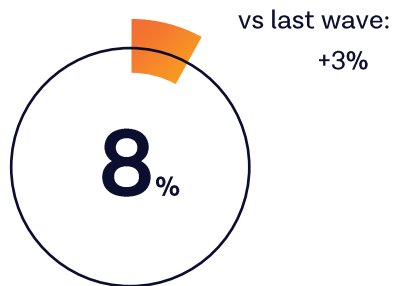
Are aware that NW is part of the Northumbrian Water Group

However, less than 1 in 10 Essex & Suffolk Water customers knew the correct meaning of NWG

Essex/Suffolk

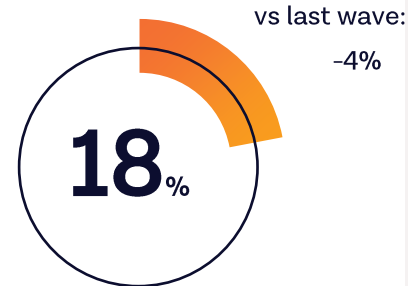


Have seen the NWG logo before



Knew the correct meaning of NWG

37% Didn't know what NWG stood for +2%

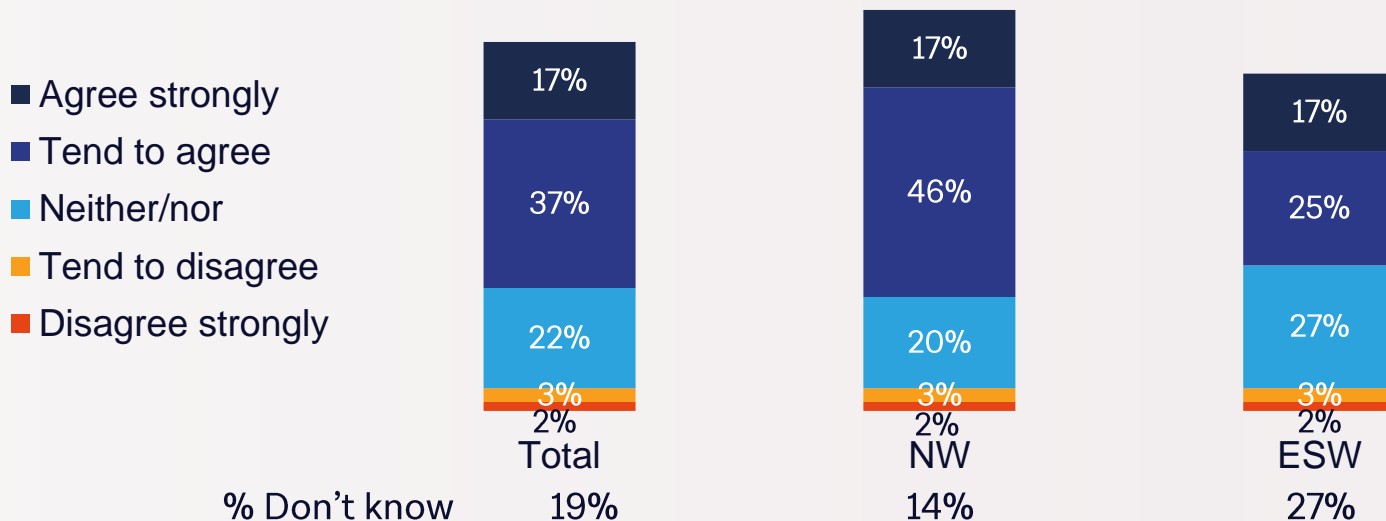


Are aware that ESW is part of the Northumbrian Water Group

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

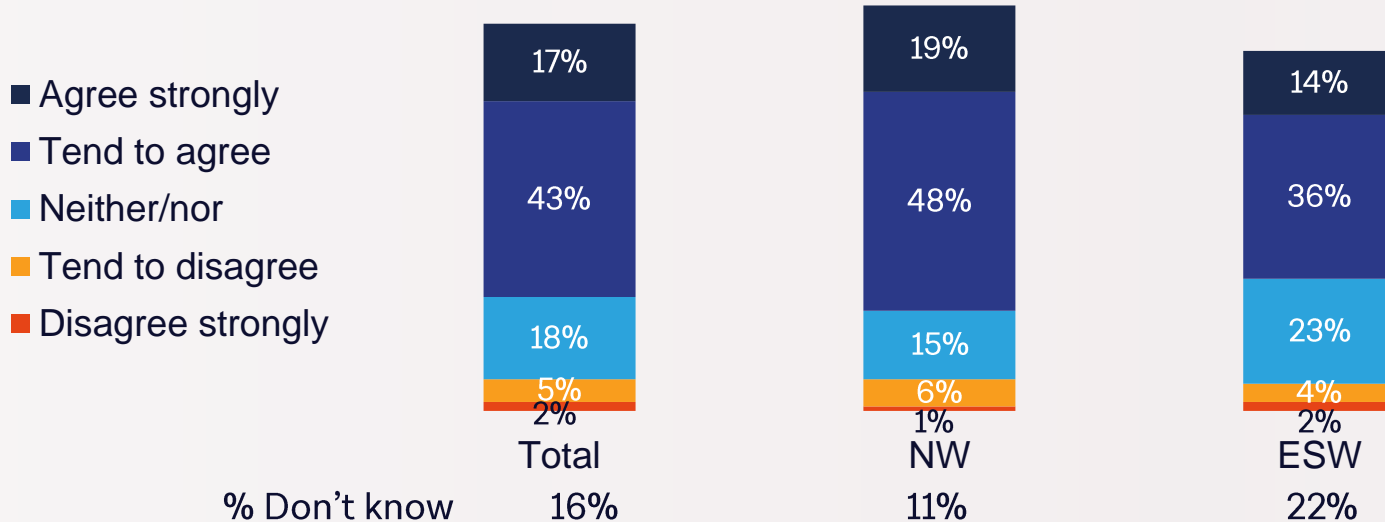


Those in the North East region, aged 18-44, and have visited a leisure site are more likely to agree with this statement

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

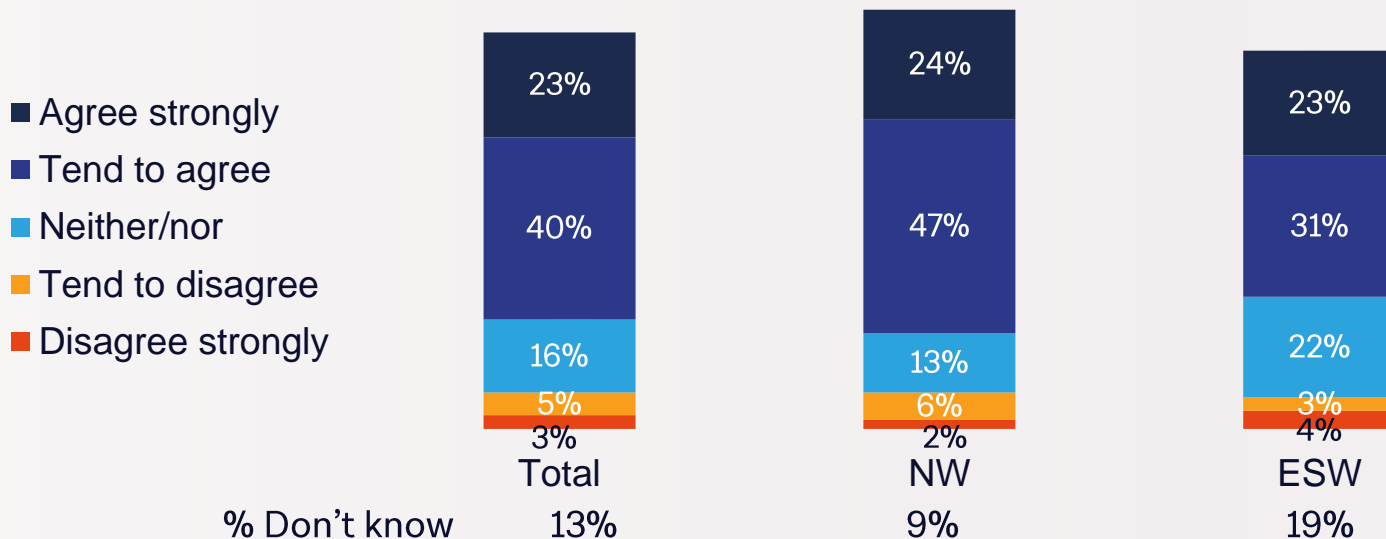


Those in the North East region, aged 18-34, and have visited a leisure site are more likely to agree with this statement

Business values and principles

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

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

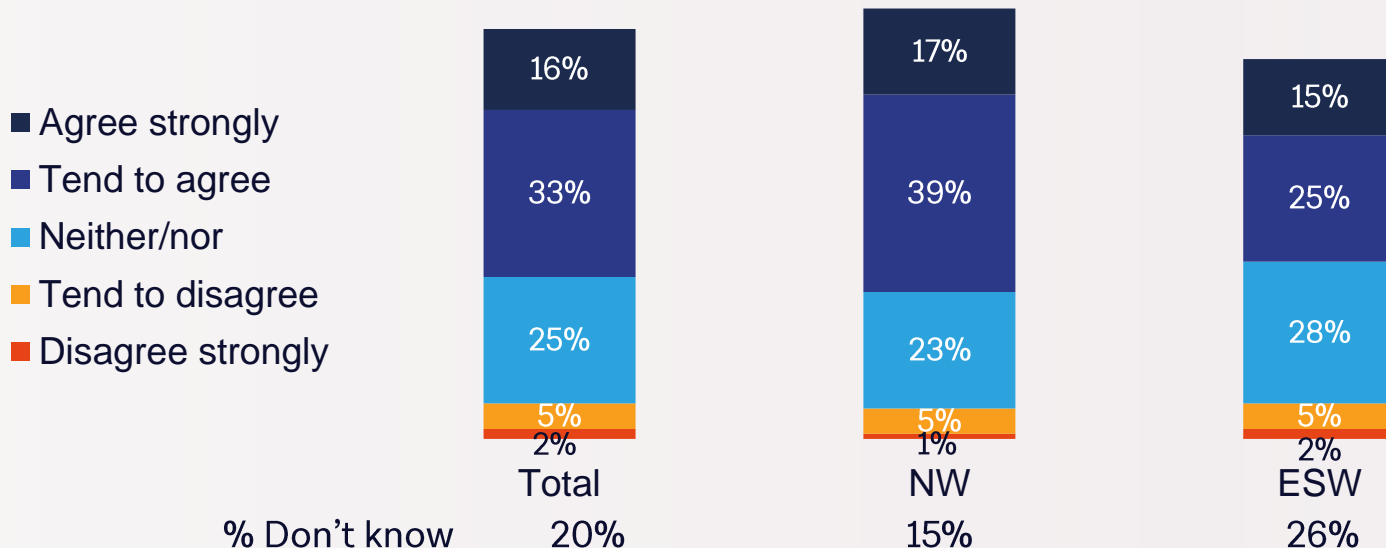


Those in the North East region, and who have visited a leisure site are more likely to agree with this statement

Business values and principles

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

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



Those in the North East region, aged 18-34, and have visited a leisure site are more likely to agree with this statement



Unprompted campaign awareness

NWG
living water

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

A third 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		5	5	-
Information about work being done/seeing work being done		28	21	7
Water saving advice/devices		10	2	8
Information about sewers/sewerage		8	7	1
Improving/expanding their service/future plans		7	4	3
Investing/upgrading infrastructure		6	4	2
Environmental information e.g. cleaner rivers		4	4	-
Local sponsorships/charity and school involvement		2	2	-

Q12. Thank you. Now, 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? Base: All respondents (501), NW Region (301), ESW Region (200)



Just Add Water

NWG
living water

TRINITY
MCQUEEN

Stimulus

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

NW

Making every penny count



ESW



Quality matters

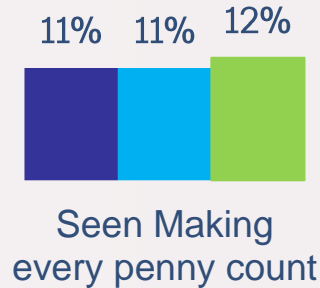
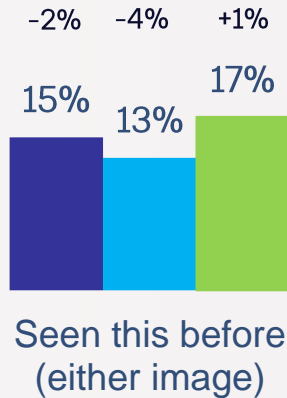


Those in the ESW region are more likely to recall seeing the images

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

■ Total ■ NW ■ ESW

vs last wave:





Water resilience

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living water

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

1 in 5 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 ages 18-34 are more likely to have seen, heard or read something from NW/ESW encouraging efficient water usage

Stimulus

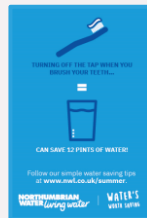
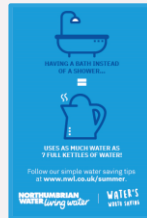
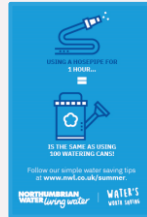
Participants were shown three images and then asked a number of questions on them:

Watering cans
instead of hose
pipe

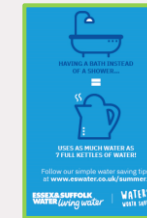
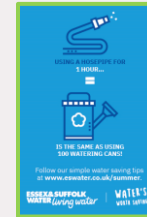
Shower instead
of bath

Turn tap off
when brushing

NW

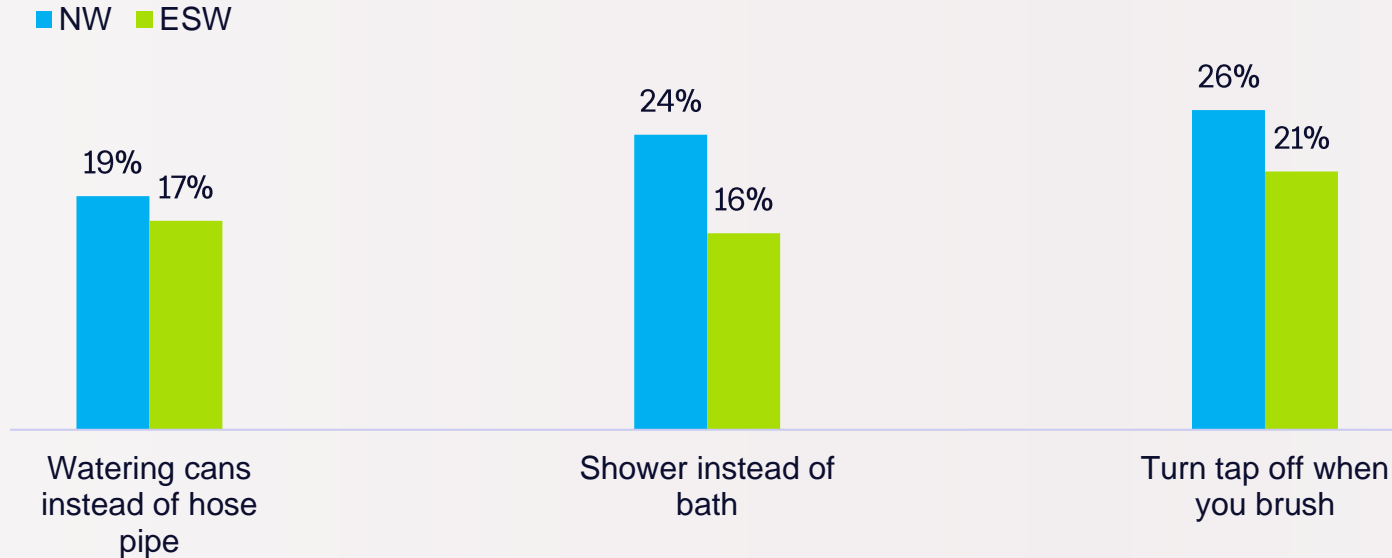


ESW



Those in the NW region are more likely to recall seeing each campaign

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



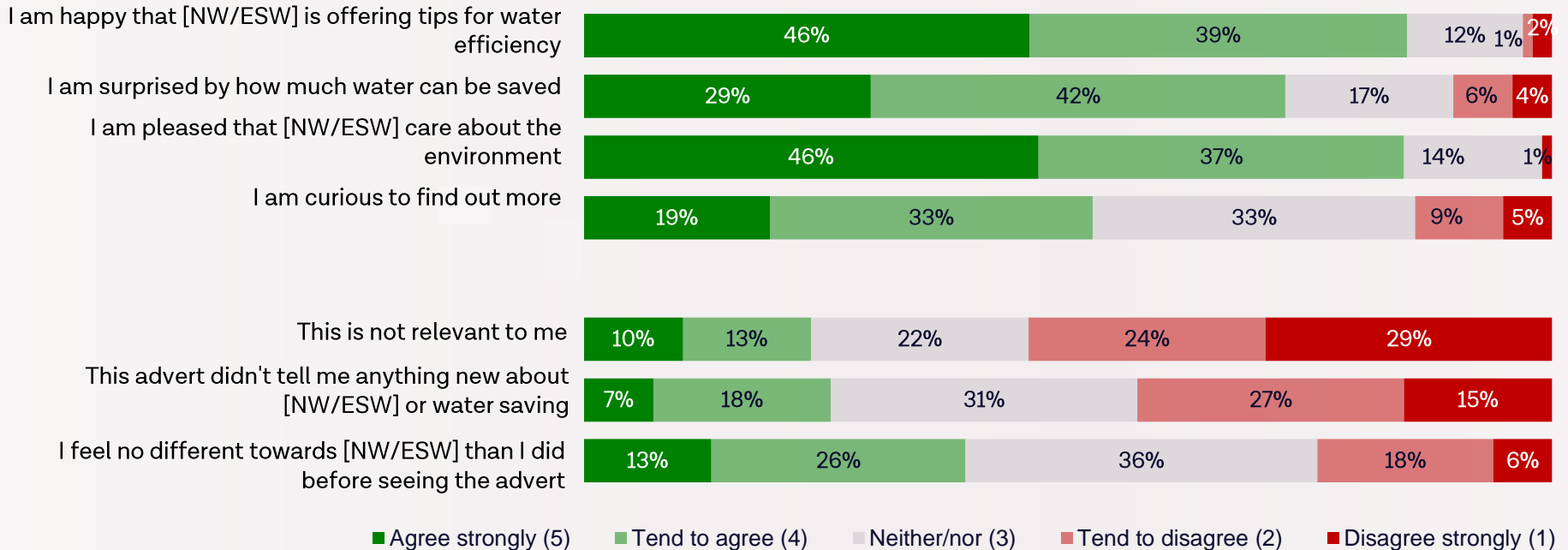
Posters on bus stops, social media, and TV are the mediums in which the campaigns are most frequently seen

Where have you seen or heard about this?

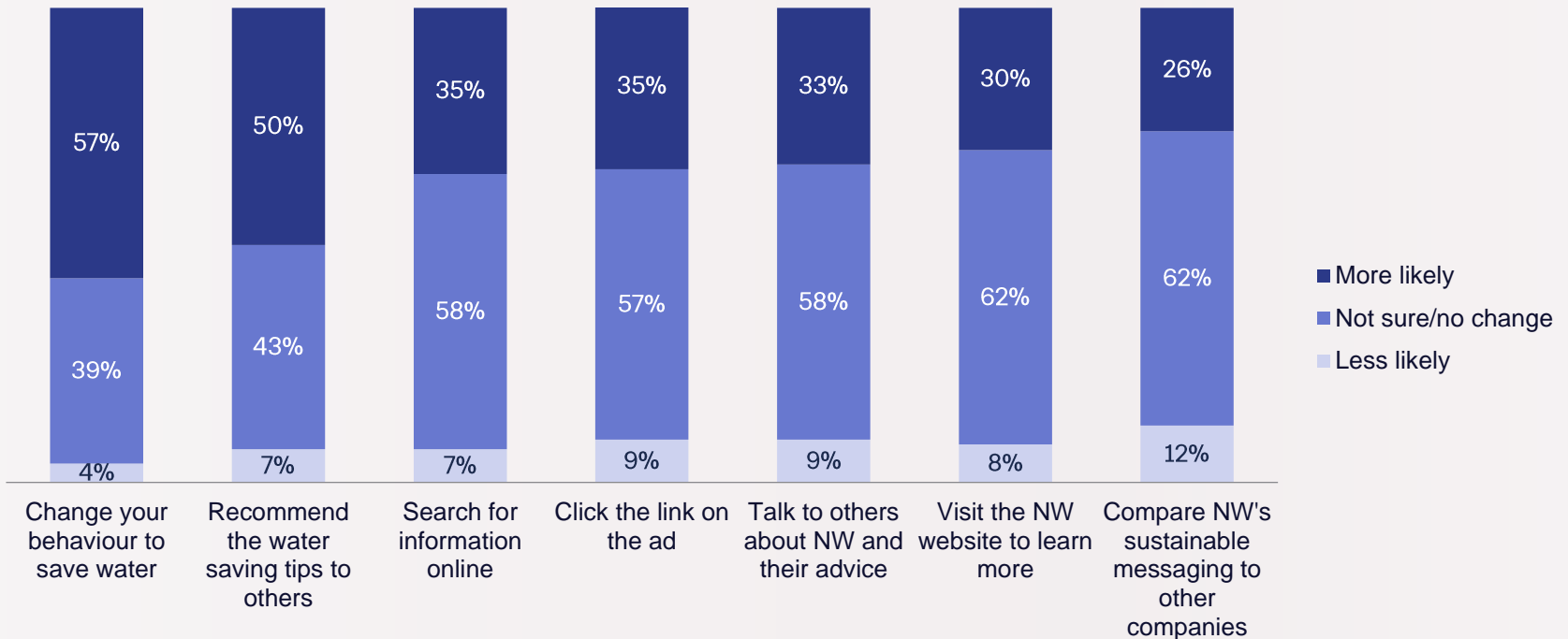
	Watering cans instead of hose pipe		Shower instead of bath		Turn tap off when you brush	
	NW	ESW	NW	ESW	NW	ESW
Newspaper	16%	18%	11%	19%	14%	17%
Magazine	18%	24%	10%	22%	6%	17%
Poster on bus stop/shelter	26%	12%	22%	9%	21%	7%
Poster on side of bus	5%	9%	15%	3%	6%	10%
Poster on roadside billboard	4%	12%	7%	9%	6%	7%
On their website	18%	18%	15%	16%	13%	20%
Social media	28%	24%	11%	22%	21%	10%
T.V.	23%	12%	22%	13%	26%	17%
Radio	5%	6%	7%	3%	6%	7%
In with the bill	12%	18%	11%	6%	6%	12%
Leaflet through the post/door	2%	3%	7%	6%	12%	5%
On a van	4%	0%	6%	0%	4%	0%
Train/metro	2%	3%	6%	6%	3%	2%
Email	7%	6%	3%	6%	3%	2%
SMS/text message	4%	0%	0%	0%	0%	0%
An ad on another website	0%	0%	3%	0%	1%	2%

8 in 10 are pleased that NWG cares about the environment

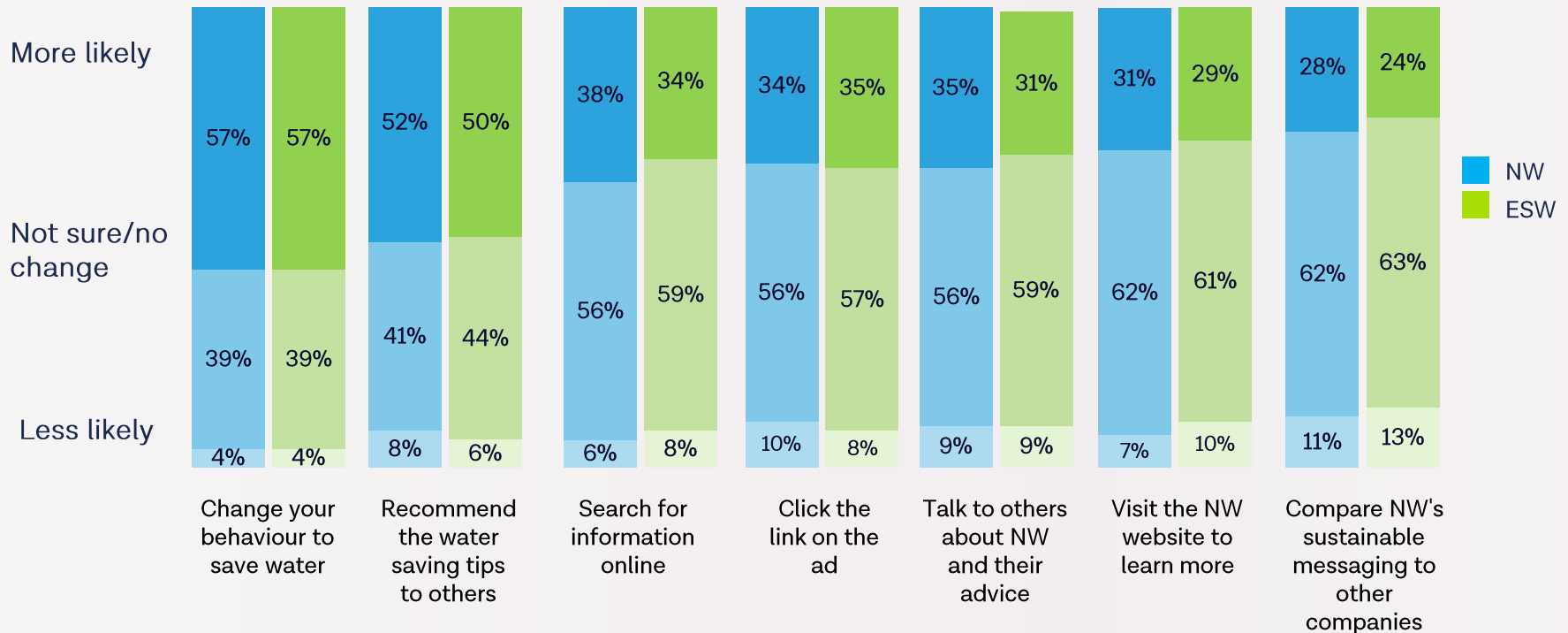
To what extent do you agree or disagree with the following statements...



Over half are more likely to change their behaviour to save water after seeing the ad

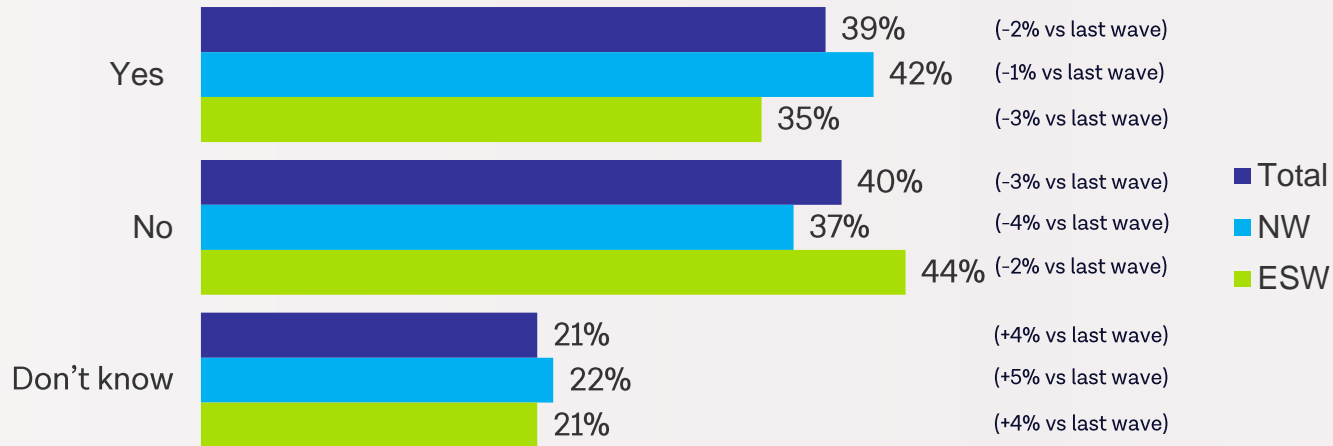


The campaign has equal influence in changing people's behaviours to save water in both areas



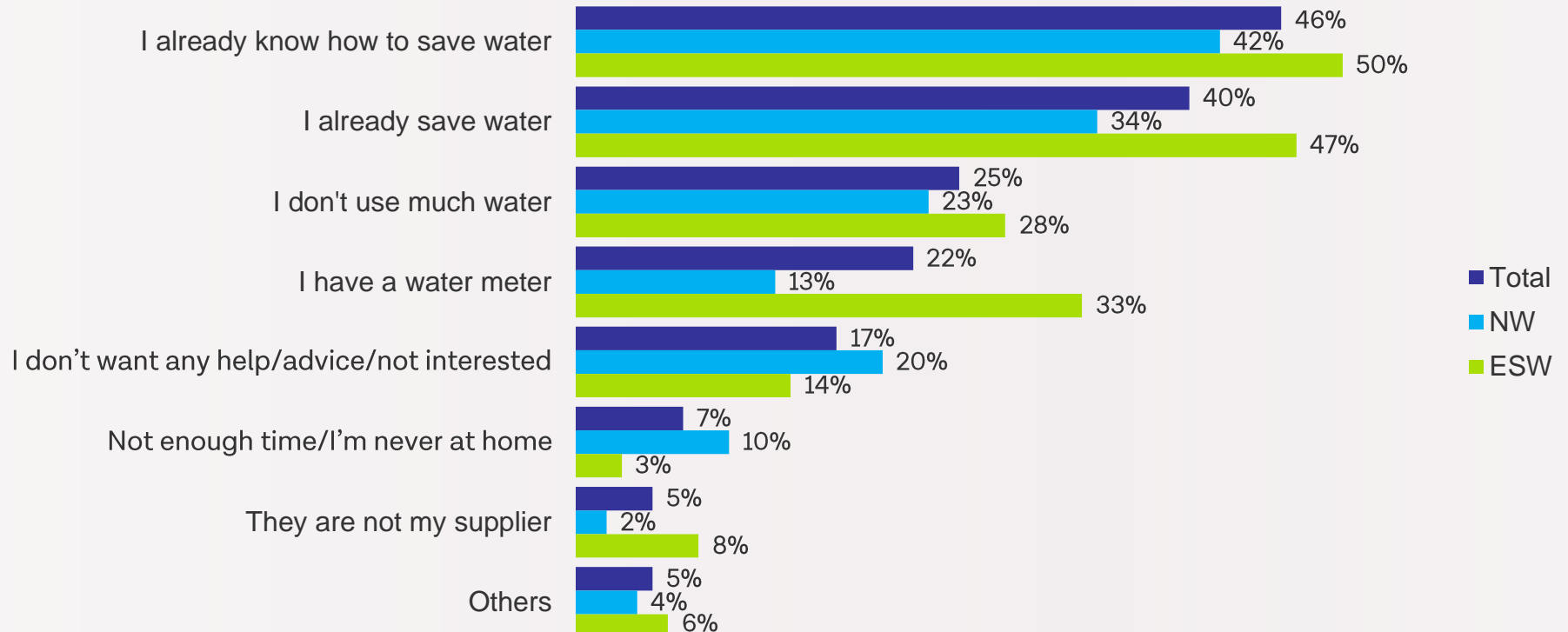
Those in the ESW region are more likely to decline a free visit to their home

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?



Around half claim to already know how to save water, with those in the ESW region most likely to say this

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 (199), NW Region (111), ESW Region (88)



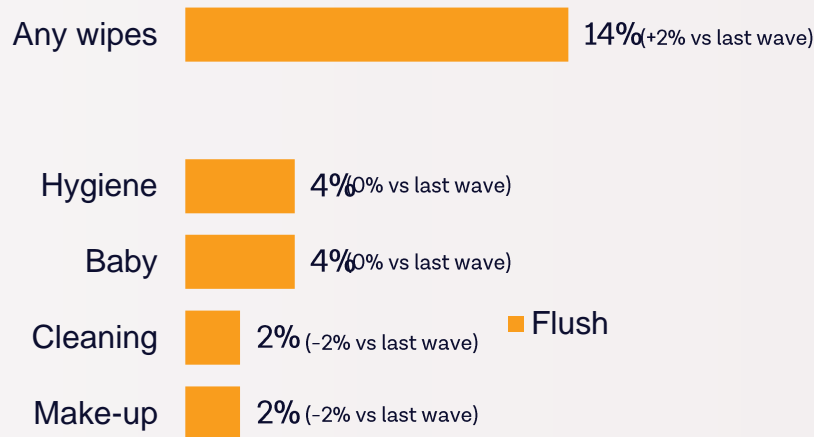
Wastewater (NW region only)

NWG
living water

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

Around 1 in 10 flush any wipe down the toilet, with over a third saying it's because they feel it to be more hygienic than putting it in a bin

Which types of wipes do you ever flush down the toilet?



42 consumers say they ever flush wipes. Why?

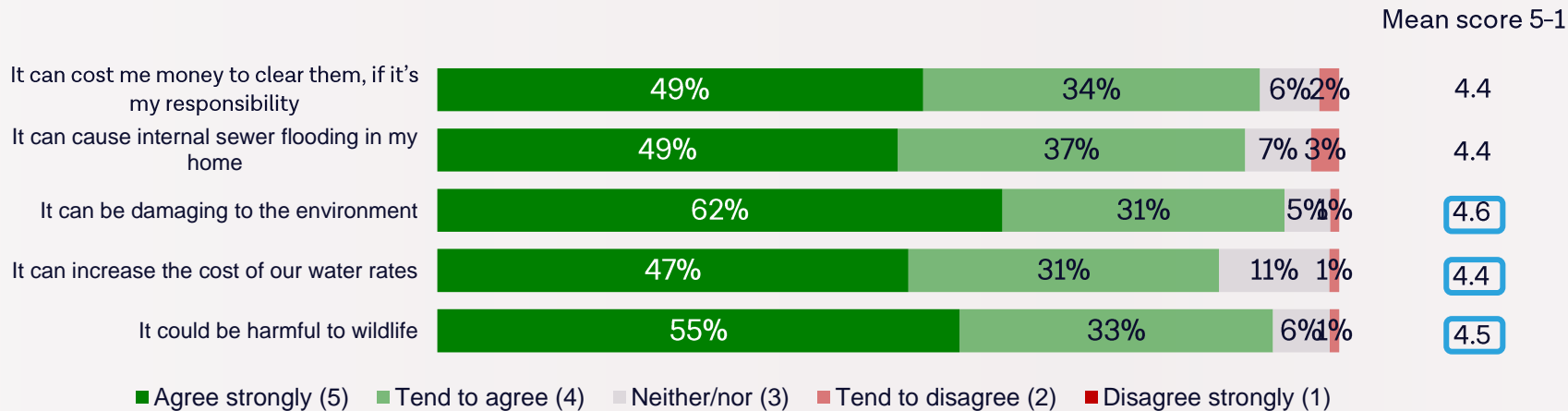
- More hygienic than putting in the bin (36%)
- Ease/convenience (33%)
- The packaging says they are flushable (33%)
- They're just like toilet paper (26%)
- They're small enough to flush (14%)
- Don't have a bin in the bathroom (12%)
- Not aware of any reason not to (10%)
- Other (10%)

9 in 10 agree that flushing wipes can be damaging to the environment

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

 = increase vs last wave





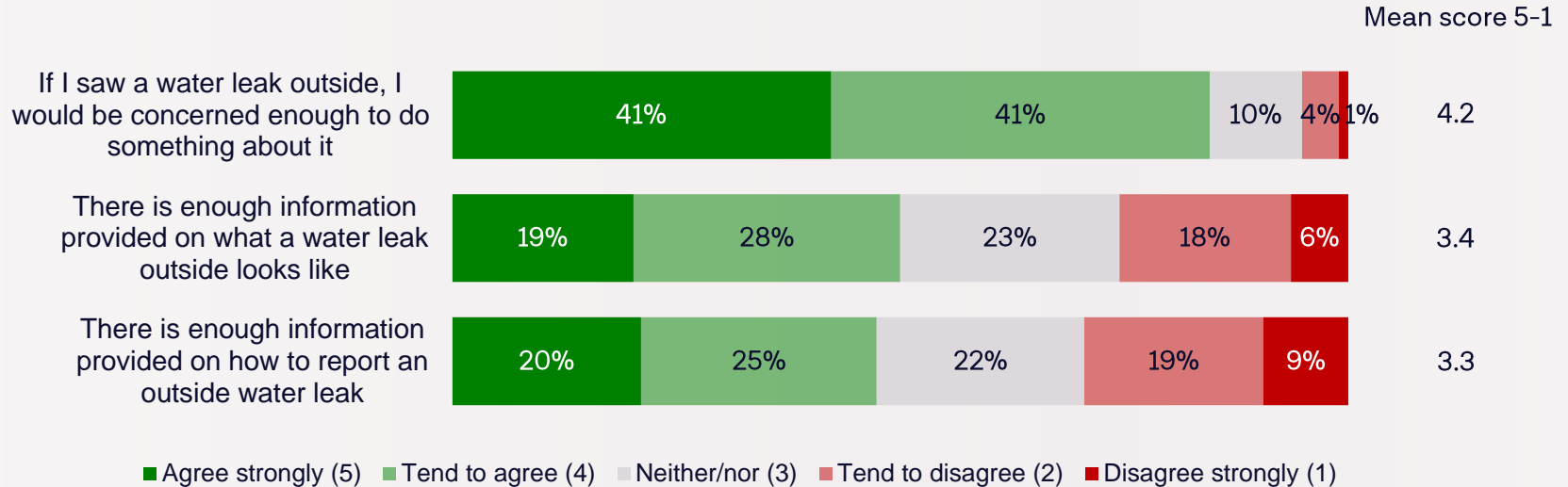
Leakage

NWG
living water

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

4 in 5 would be concerned enough about a water leak outside to do something about it

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



Agreement on all statements higher amongst those who recall messaging/campaigns than amongst others

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

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

Enough information provided on how to report an outside water leak – higher among Males

Over half would report a water leak to a water company, with 4 in 5 reporting a burst pipe

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 (54%)
- Search online for who to report it to (35%)
- Report it to the council (19%)
- Nothing/ignore it (10%)
- Don't know (6%)

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



22%

(-6% vs last wave)



86%

(+4% vs last wave)

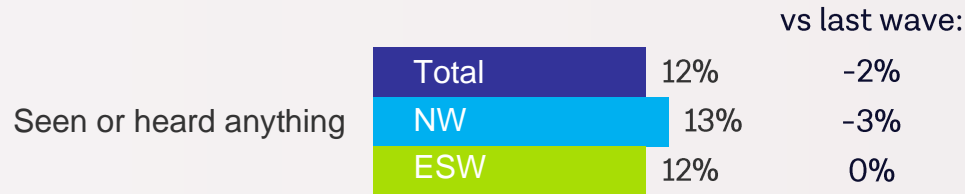


44%

(+2% vs last wave)

Messaging recall is around 1 in 10, seeing slight decreases from last wave

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



Phone continues to be leading way to report a leak, with social media being the least popular

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

	Total	NW	ESW
Phone	52%	53%	52%
Email	25%	25%	25%
Webchat	8%	9%	6%
Twitter	3%	2%	4%
Facebook	3%	4%	3%
Look on website for how to do it	41%	39%	43%
Don't know	5%	5%	5%
Wouldn't do it	1%	1%	2%



Leaking toilet

NWG
living water

TRINITY
MCQUEEN

The main message takeaway, with 1 in 5 stating this, is that NWG will provide free repairs for toilet leaks



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

This advertisement features a teal background. On the left, the headline 'IS YOUR LOO COSTING YOU?' is in large white letters, with the Northumbrian Water logo below it. On the right, three white line-art icons of toilets are arranged vertically, each with a small circle indicating a leak. The words 'Hidden', 'Trickling', and 'Flowing' are placed to the right of each icon respectively.

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 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

This advertisement features a green background. On the left, the headline 'IS YOUR LOO COSTING YOU?' is in large white letters, with the Essex & Suffolk Water logo below it. On the right, three white line-art icons of toilets are arranged vertically, each with a small circle indicating a leak. The words 'Hidden', 'Trickling', and 'Flowing' are placed to the right of each icon respectively.

FREE LEAKING TOILET REPAIR FOR OUR CUSTOMERS!

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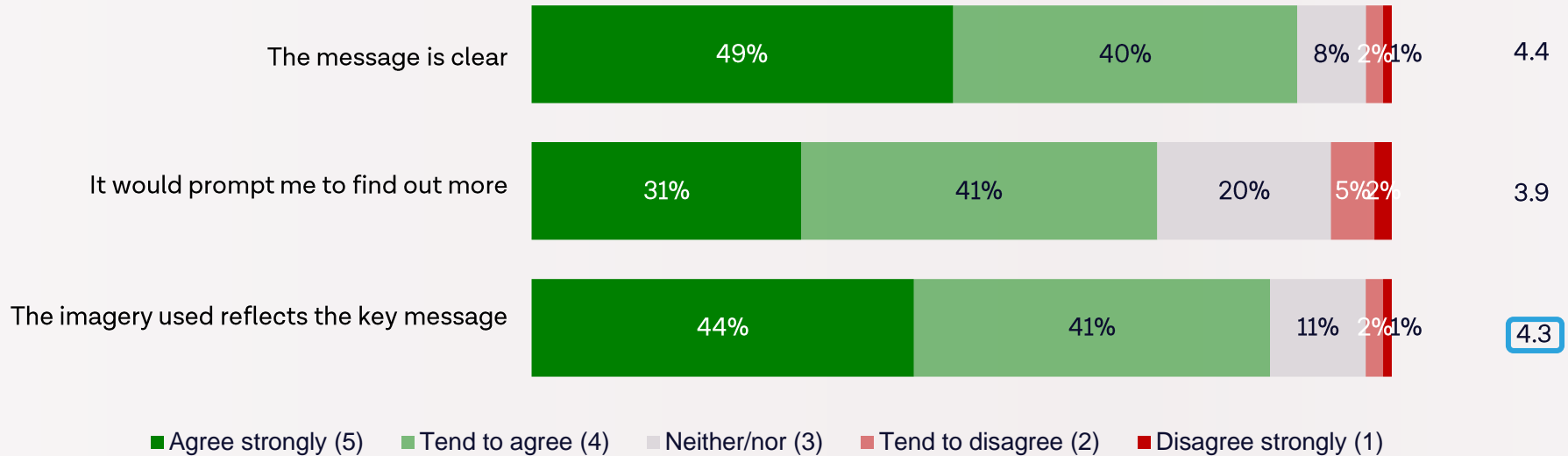
You can also scan the QR code below using the camera function on your smart phone to send us a video of your leaky loo and we'll come and fix it for free.



The majority agree the message is clear, with almost 3 in 4 suggesting it would prompt them to find out more

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

4.3 = increase vs last wave
Mean score 5-1





Smart Water Metering

NWG
living water

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

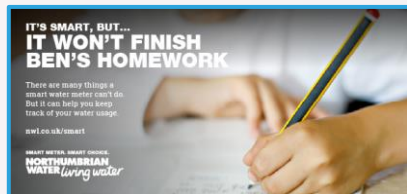
2 in 5 understand Smart Water Metering to be a device to monitor water usage

	Total	NW	ESW
Monitors/shows your usage/consumption	40%	39%	41%
Meter readings taken remotely	14%	12%	18%
Enables you to control water usage/save water	10%	9%	12%
Pay only for what you use	10%	11%	8%
Accurate billing	7%	5%	10%
Shows how much money you are spending	4%	5%	4%
It's a water meter/having a water meter	4%	4%	3%
Helps with budgeting/saving money	3%	4%	3%
Higher charges/expensive	1%	2%	1%
Can help identify leaks	1%	0%	2%
Cheaper bills	0%	0%	1%
Other	11%	12%	9%
Don't know	8%	9%	8%

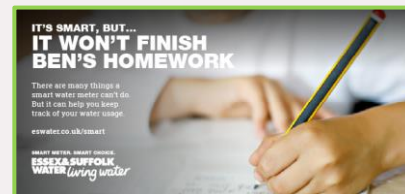
Stimulus

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

NW



ESW



The main message takeaway is the ability to track water usage, although some find it confusing

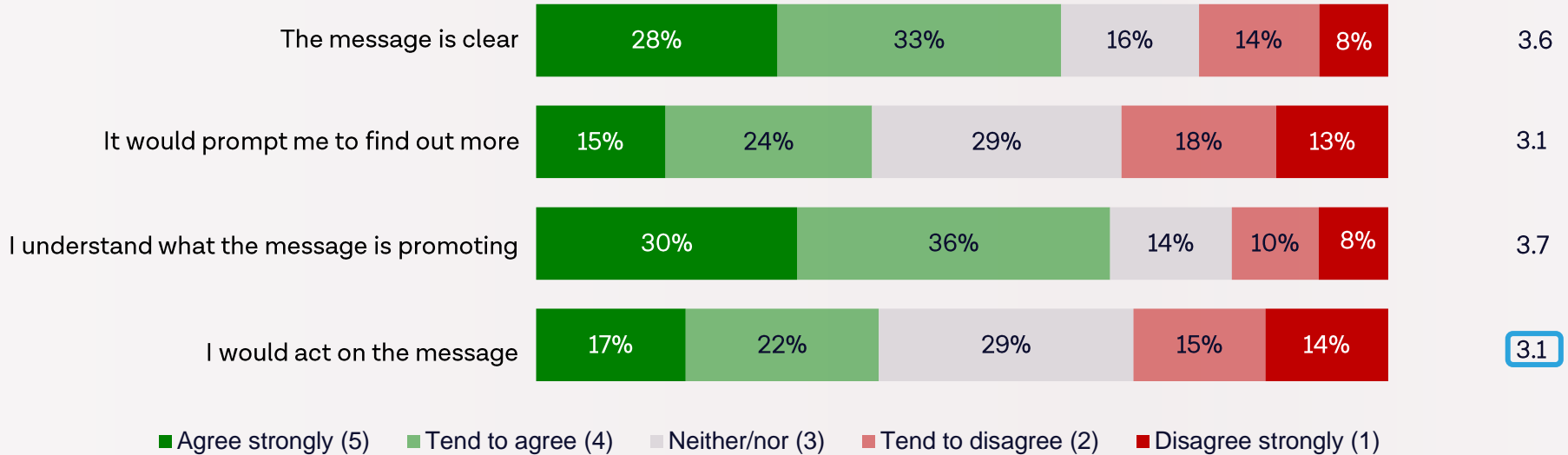
	Total	NW	ESW
Track/monitor your water usage	43%	41%	47%
It's smart but not that smart/what it can and can't do	8%	8%	8%
Information on how a smart meter can help	6%	7%	5%
Can help you control your water consumption better	5%	6%	3%
Get a smart meter	4%	5%	2%
Don't waste water/how to save water	4%	3%	5%
A smart meter can save money/lower bills	3%	3%	3%
Confusing/obscure/unclear	3%	3%	3%
Advertising smart meters	2%	2%	3%
Don't know/nothing	19%	19%	20%
Other	10%	10%	10%

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 (501), NW Region (301), ESW Region (200)

Two thirds understand what the message is promoting

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

 = increase vs last wave
Mean score 5-1

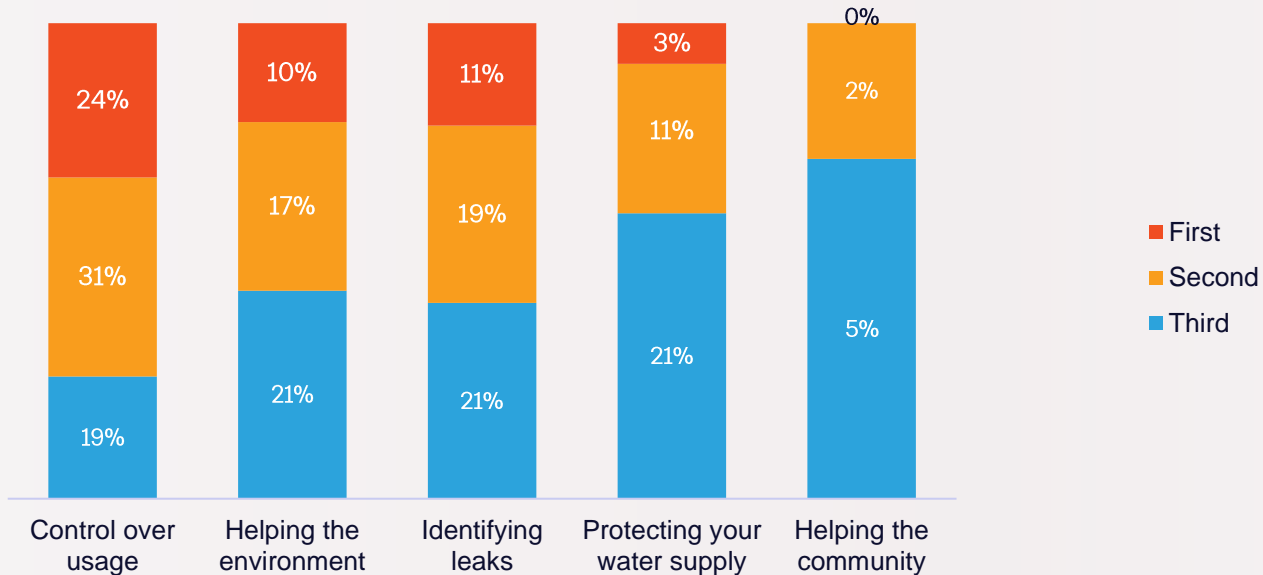


Providing clearer information, and providing benefits to having a Smart Water Meter would improve the ads

	Total	NW	ESW
Clearer information/message/more direct	17%	19%	15%
More facts/benefits from having a smart meter	10%	12%	8%
Better/relevant images/pictures - water based	7%	8%	6%
Include a cost comparison with and without a meter/how much you could save	5%	6%	4%
Show the smart meter/what it looks like (working)	5%	3%	7%
Give examples on how to save water/money - how we waste water/money	4%	3%	5%
Enlarge text/lettering - make it more eye-catching	3%	3%	4%
Change everything/scrap it	2%	2%	3%
Advertise more/include with the bills/social media	2%	3%	1%
Nothing/none	25%	23%	28%
Don't know	14%	16%	11%

The main benefit to having a Smart Water Meter is considered to be control over usage

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.





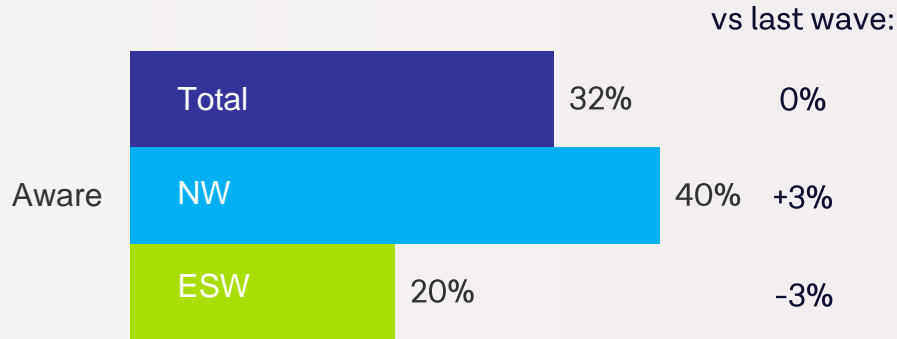
Waterside Parks

NWG
living water

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

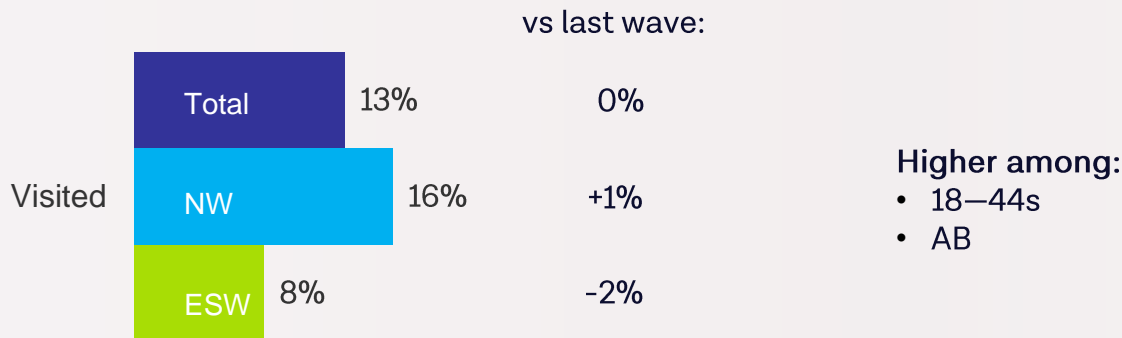
A third are aware that NWG operates Waterside Parks, despite a slight decrease in ESW for awareness

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?



Overall, those visiting a Waterside Park has remained stable to last wave, but ESW has seen a small decline

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





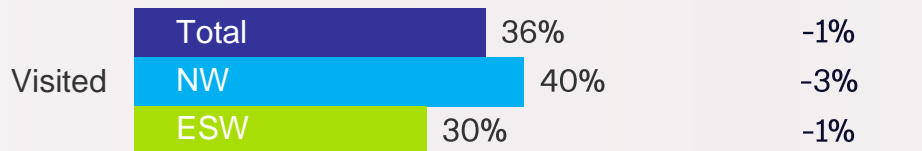
Website

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?

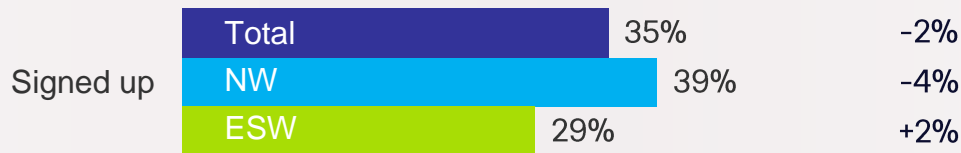


What were you looking for? (Those who visited the website)

	Total	NW	ESW
To check your account	51%	49%	56%
To pay a bill	30%	29%	32%
For information on water saving, or to get a water saving device	13%	13%	12%
For information on works being carried out	12%	13%	12%
To find a contact number/email address	11%	13%	8%
For information on prices/tariffs	11%	9%	15%
To set up / change/cancel a direct debit	10%	8%	14%
To register for e-billing	10%	8%	14%
For information on, or to get, a water meter	10%	12%	7%
To report a leak	10%	11%	8%
To change address/moving house	8%	13%	0%
To report a water supply/quality issue	7%	8%	5%
To download the app	4%	6%	2%
For information on their leisure sites	4%	4%	3%

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	30%	32%	28%
Prefer paper bills	26%	27%	25%
I don't pay our water bills	12%	12%	11%
Concerned about online security/privacy	9%	10%	9%
I am with another water company	9%	4%	15%
Get too many emails/might forget	7%	6%	7%
Don't know how it works	4%	3%	6%
Water bill included in rent/not bill payer	3%	4%	2%

An aerial view of a stone plaza with a diagonal shadow. Two people are looking at their phones. 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

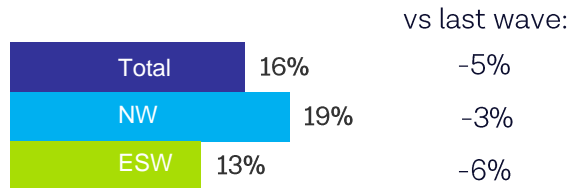
NWG
living water

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

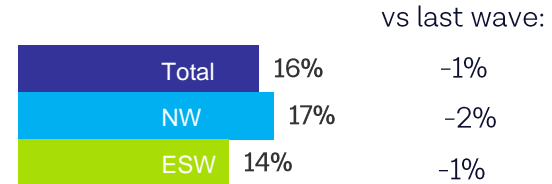
Under a fifth recalling seeing, hearing or reading anything from NW/ESW about how they can help people

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?



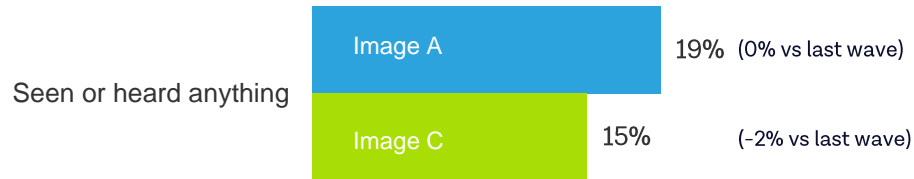
For both NW and ESW, just under 1 in 5 recall seeing the campaign

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

Image A (NW)

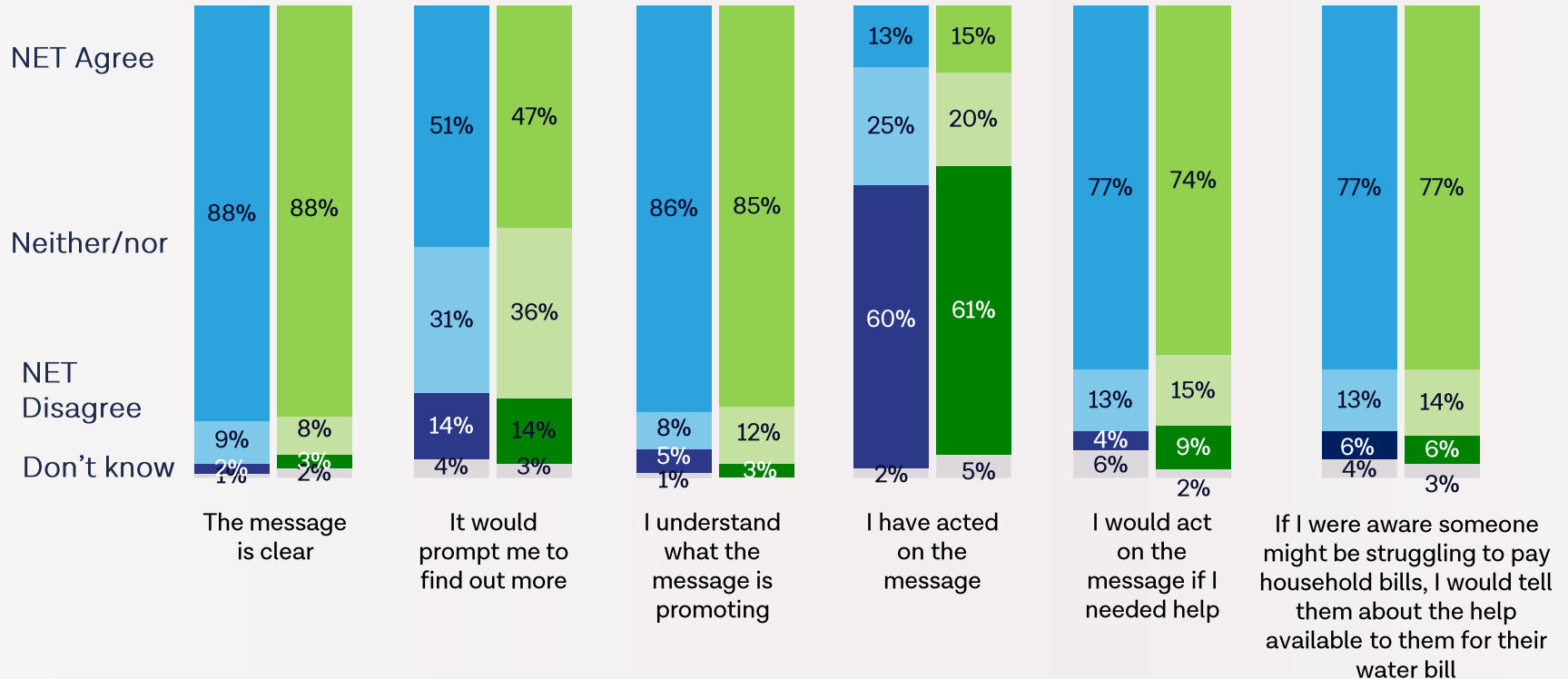


Image C (ESW)



Despite the message being clear to most, only a minority have acted on it

Image A (NW)
Image C (ESW)



More people recall seeing image E, with only 1 in 10 recalling image D

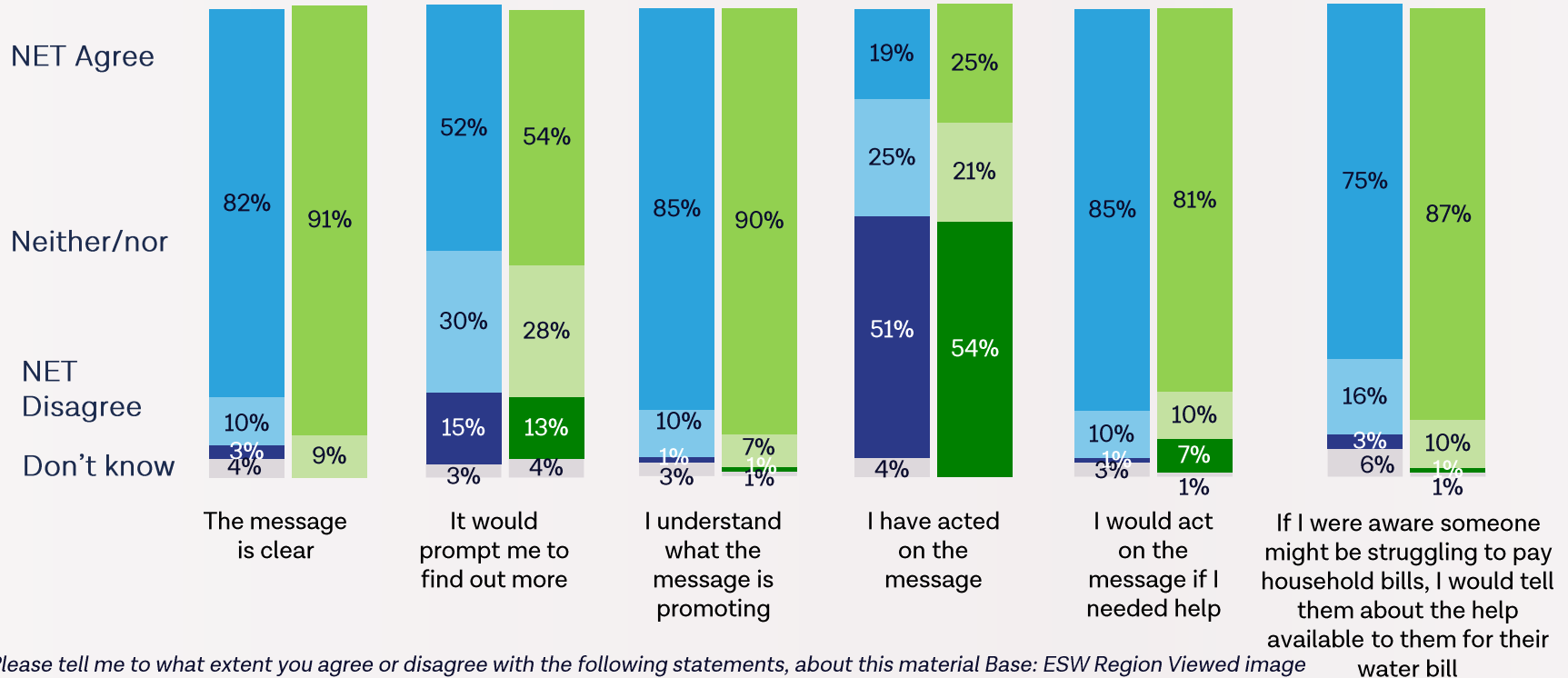
Here is an example of the campaign materials. Do you recall seeing or hearing anything about this, before today?



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

Nearly all agree the message is clear and understand it, but half haven't acted on the message

Image D
Image E

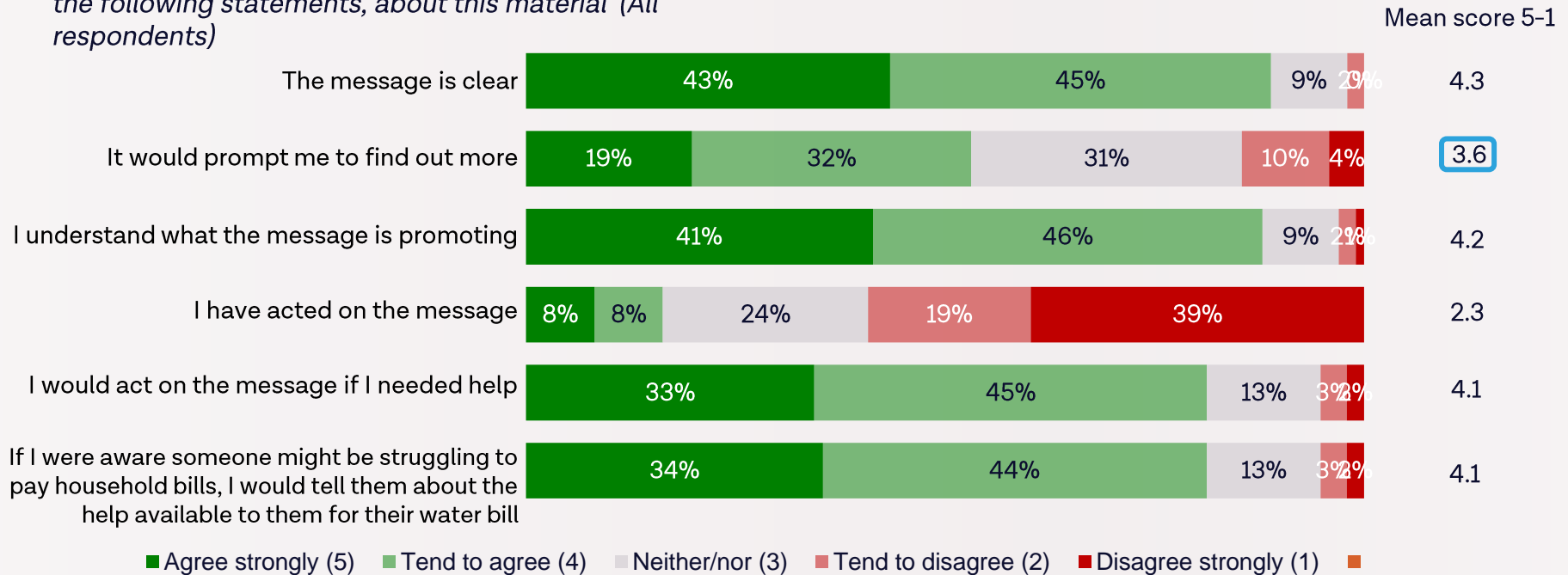


Q46. Please tell me to what extent you agree or disagree with the following statements, about this material Base: ESW Region Viewed image 10d (67) and 10e (67) at Q46

Although over half have not acted on the message, over three quarters said they would if they needed help

 = increase vs last wave

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





The app

NWG
living water

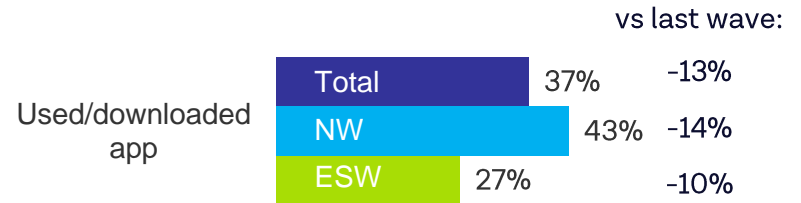
T R I N I T Y
M Q U E E N

Awareness of the app has continued to decrease

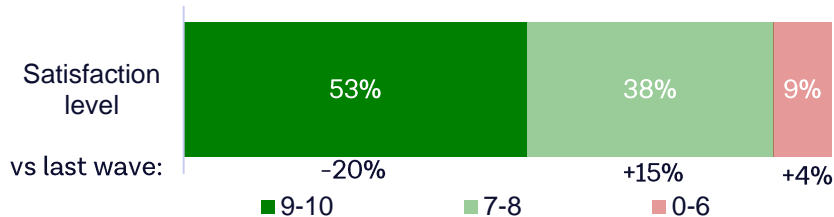
Did you know that NW/ESW has an app, to manage your account?



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	64%
More services available	4%
Rewards	2%
Ensure app has the same functions as online access (PC)	2%

Q47aa. Did you know that [NW/ESW] has an app, to manage your account Base: All respondents (501) Q47a. Have you used or downloaded the app? Base: All those aware of the app (140). 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 (52)



Flo awareness

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

Less than 1 in 10 recall seeing the customer engagement team or Flo

Have you seen [NW/ESW's] customer engagement team, with Flo, their engagement vehicle, one of their pop-up shops?

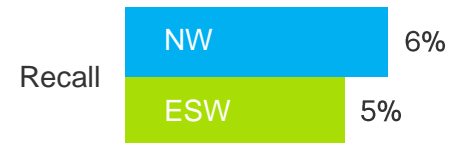


Here are some pictures of Flo and their pop-up shops. Do you recall seeing a vehicle or shop like this before today?

Image A (NW)



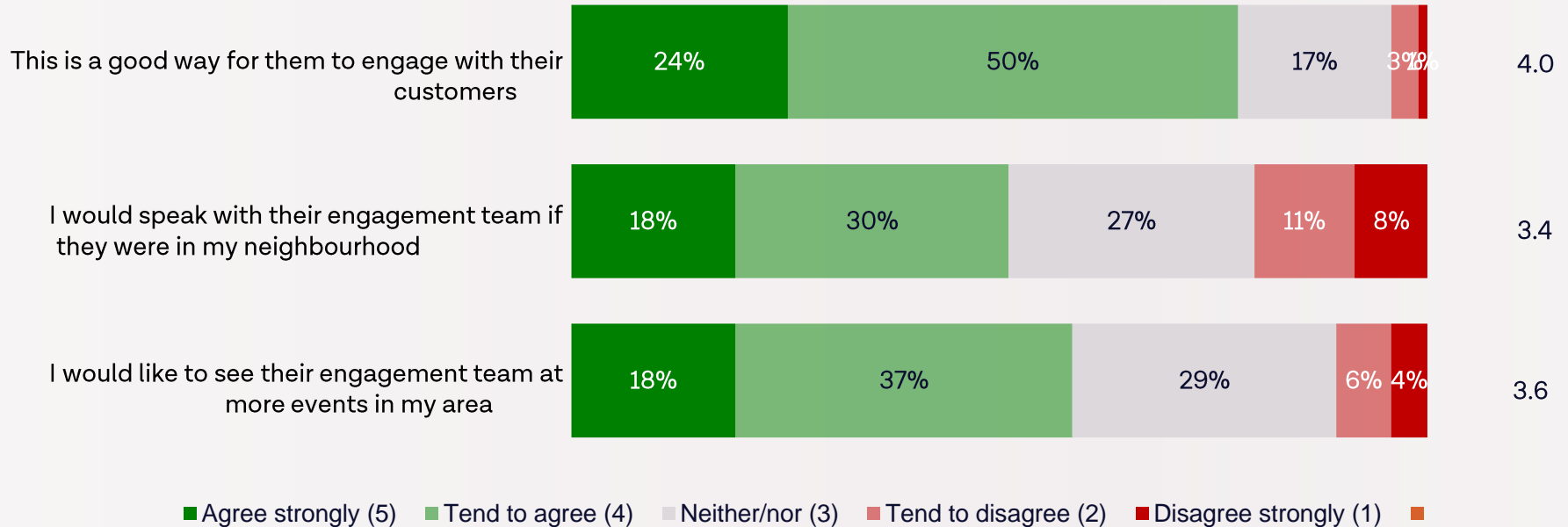
Image B (ESW)

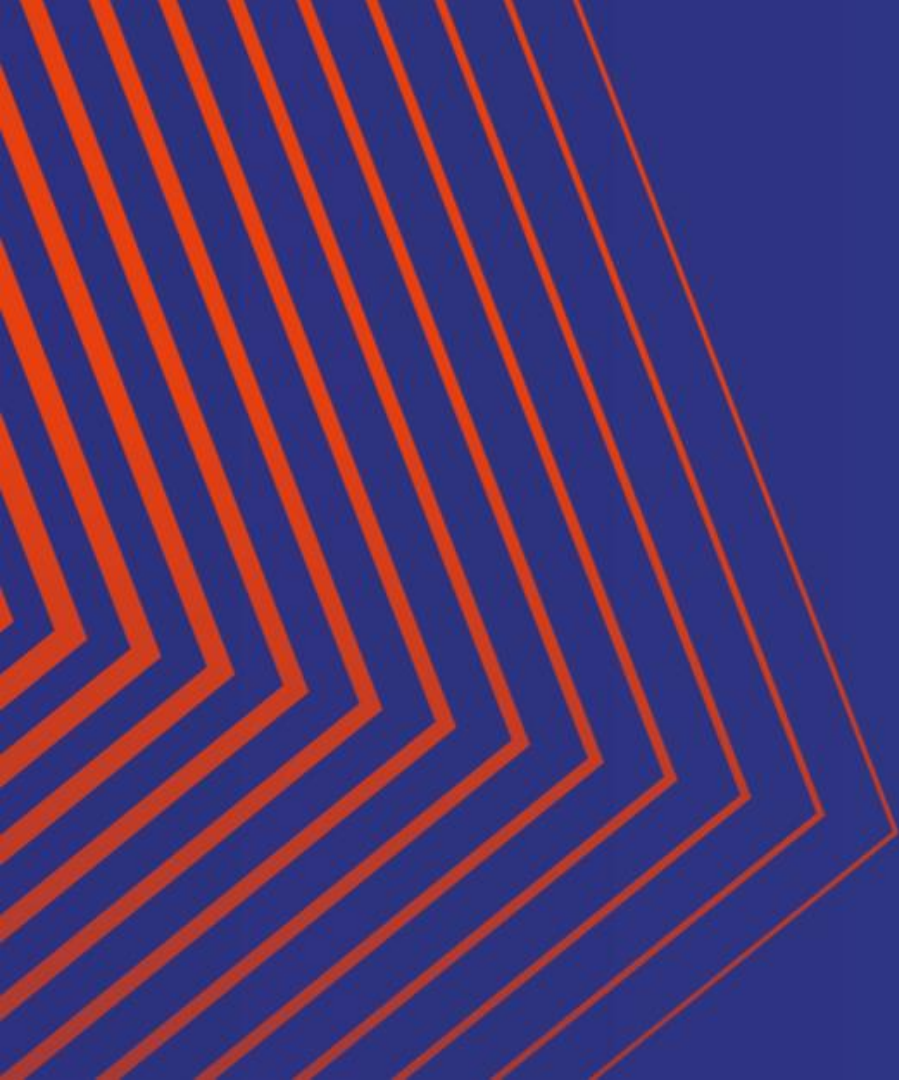


4 in 5 agree that Flo is a good way for NWG to engage their customers

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

Mean score 5-1





TRINITY
MCQUEEN