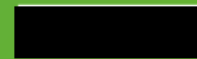
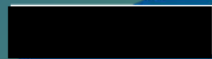


VALUE OF WATER

RESEARCH RESULTS – DECEMBER 2021



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- 1 Introduction
- 2 Sample and billing profile
- 3 Executive summary
- 4 Results

VALUE OF WATER – NOVEMBER 2021

INTRODUCTION

This report details the findings of what our customers value most about water. A total of 400 interviews were carried out by phone, by Trinity McQueen between 15 October 2021 and 19 November 2021.

The total spread across our regions were as follows, and are in line with our customer base:

Area	%
North	63%
Essex	31%
Suffolk	6%

The data was provided by NWG with any customers removed who had not opted in to take part in marketing or research activity, and were also matched against the national TPS register to ensure everyone who did not want contact were removed from the database before any phone calls were made.

Age quotas were set in line with the national home-owner population (as detailed in the Labour force Survey), alongside the split of our customer base in our three operating areas, this being 63% in the North, 31% in Essex and 6% in Suffolk.

VALUE OF WATER – NOVEMBER 2021

SAMPLE AND BILLING PROFILE

Sample profile	NWG	NW	ESW
Male	52%	46%	61%
Female	48%	54%	39%
18 to 34	15%	17%	11%
35 to 44	13%	14%	11%
45 to 54	16%	18%	13%
55 to 64	23%	17%	31%
65+	34%	34%	34%
AB	31%	30%	31%
C1	47%	44%	50%
C2	9%	10%	6%
DE	14%	15%	12%
Refused	1%	-	1%

Billing profile	NWG	NW	ESW
Metered	68%	64%	74%
Not metered	33%	36%	26%
Direct Debit	82%	87%	74%
Not Direct Debit	18%	13%	26%

EXECUTIVE SUMMARY

VALUE OF WATER – NOVEMBER 2021

EXECUTIVE SUMMARY

The first three things that come to mind when asked what water is used for at home were washing (self, kids), baths, showers (91%); followed by washing clothes/laundry (55%) and washing up/dishwasher (53%).

The top three things people would miss if water wasn't readily available are washing (self, kids), baths, showers (89%); followed by washing clothes/laundry (50%) and washing up/dishwasher (38%). This was closely followed in fourth place by drinking cold water (37%).

The top words for the feelings water inspires in people when thinking about the natural environment or in the home were: essential for life; health; promotes growth outdoor, soothing feel and calming.

The top words for favourite things about water were: it keeps you hydrated; thirst quenching and drinking.

Respondents were more likely to agree with the statement that reusable bottles are better than single use bottles, for drinking water from (89%), followed by the water they use has no smell (86%). The lowest scoring statement was respondents agreeing that our drinking water tastes better than bottled water (32%).

There was strong agreement (98%) that water is a valuable resource, along with 96% agreeing that it's important that everyone uses water more efficiently. A high number of respondents either disagreed or didn't know that it can take up to six weeks to make water drinkable (53% total for both).

VALUE OF WATER – NOVEMBER 2021

EXECUTIVE SUMMARY

Feedback indicates that 63% of respondents are more likely to agree that they tend to take water being available for granted. With just under a third (29%) agreeing that there's not much they can do to save water. Just over half (51%) agree that the water supply is not under any particular pressure.

The top ways to encourage behaviour change to reduce water usage, if respondents were told that their water supply was under pressure, would be to educate people, advertise and give the public information and advice on what they could do to make changes.

Looking at feedback on the environmental statements, 86% indicated that reducing single plastic use is the most important. With the exception of eating less meat (30%) all the other statements scored 50% or more.

Looking at more environmental statements, 75% indicated that tackling problems with biodiversity and wildlife was the most important, closely followed by rising sea levels (71%) and sewage pollution (70%). Changing rainfall patterns scored the lowest at 52%.

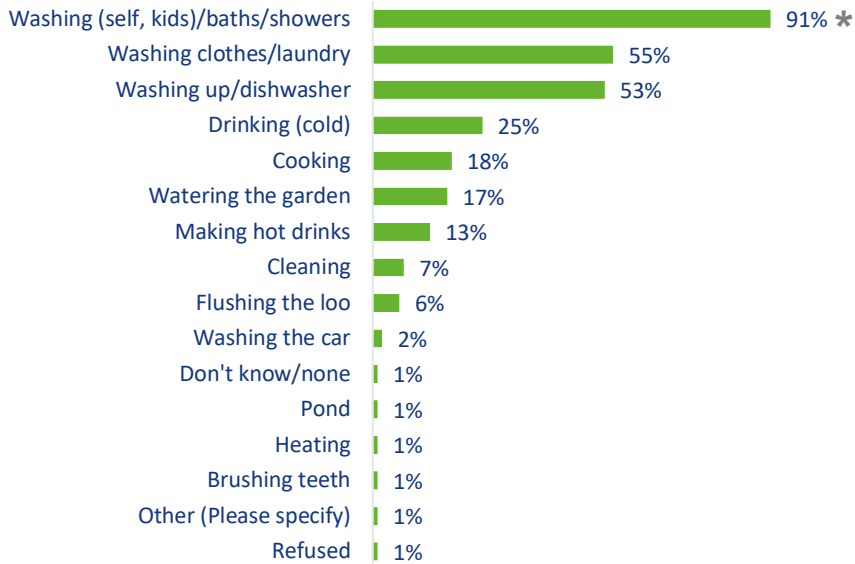
Looking at leaky loos, 87% agree that they would be able to spot a leaking toilet, with 82% indicating that they would know who to contact to get one fixed. Only 13% are aware that NW/ESW do free leaky loo repairs.

RESULTS

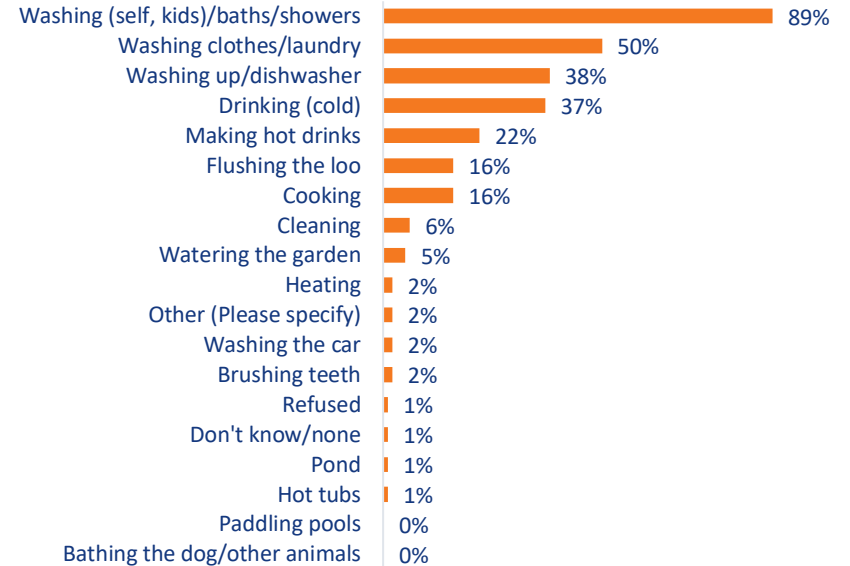
VALUE OF WATER

VALUE OF WATER – NOVEMBER 2021 RESULTS

First of all, what are the first three things that come to mind if I ask you what you use water for at home?



Thinking about the ways you use water, which three things would you miss if it wasn't readily available?



* Those aged between 18 and 54, and those 65+ are more likely to say this.

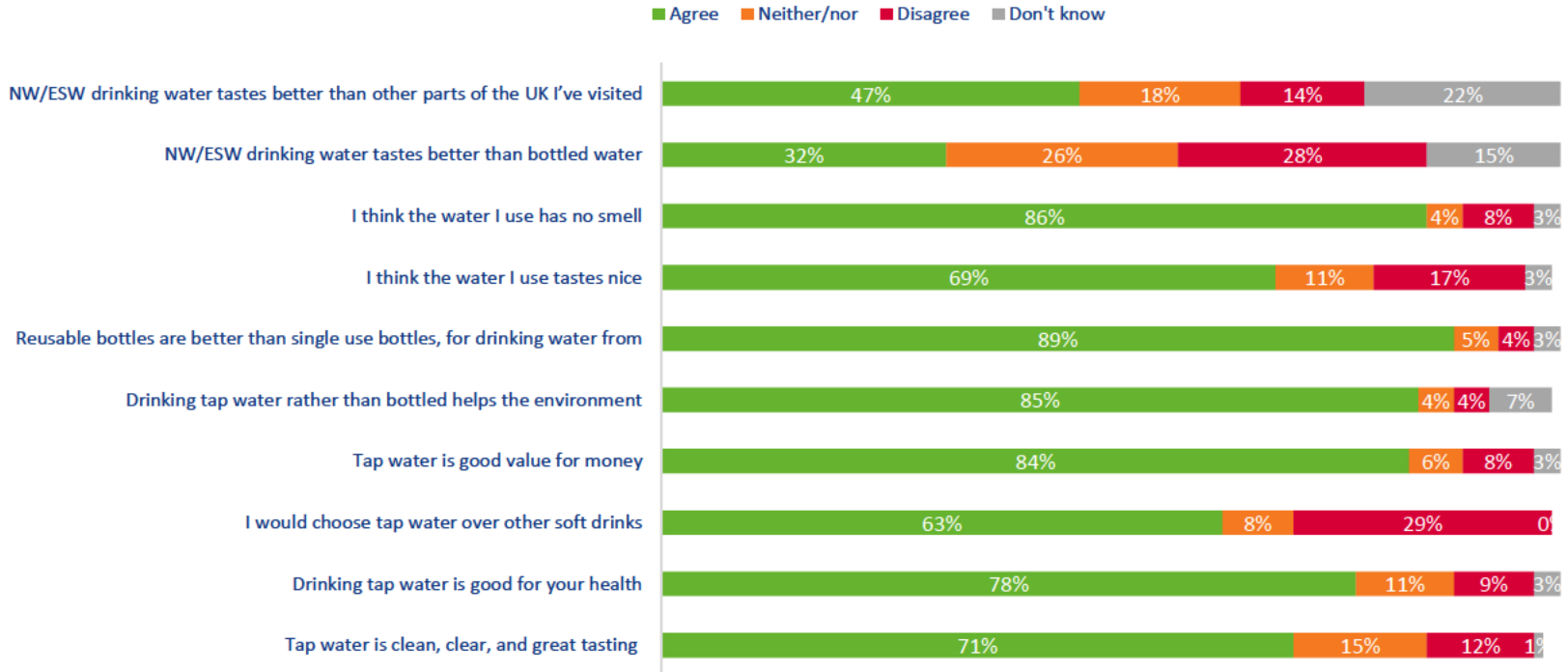
VALUE OF WATER – NOVEMBER 2021 RESULTS

What is your favourite thing about water?



VALUE OF WATER – NOVEMBER 2021 RESULTS

Agreement with the following statements:



VALUE OF WATER – NOVEMBER 2021

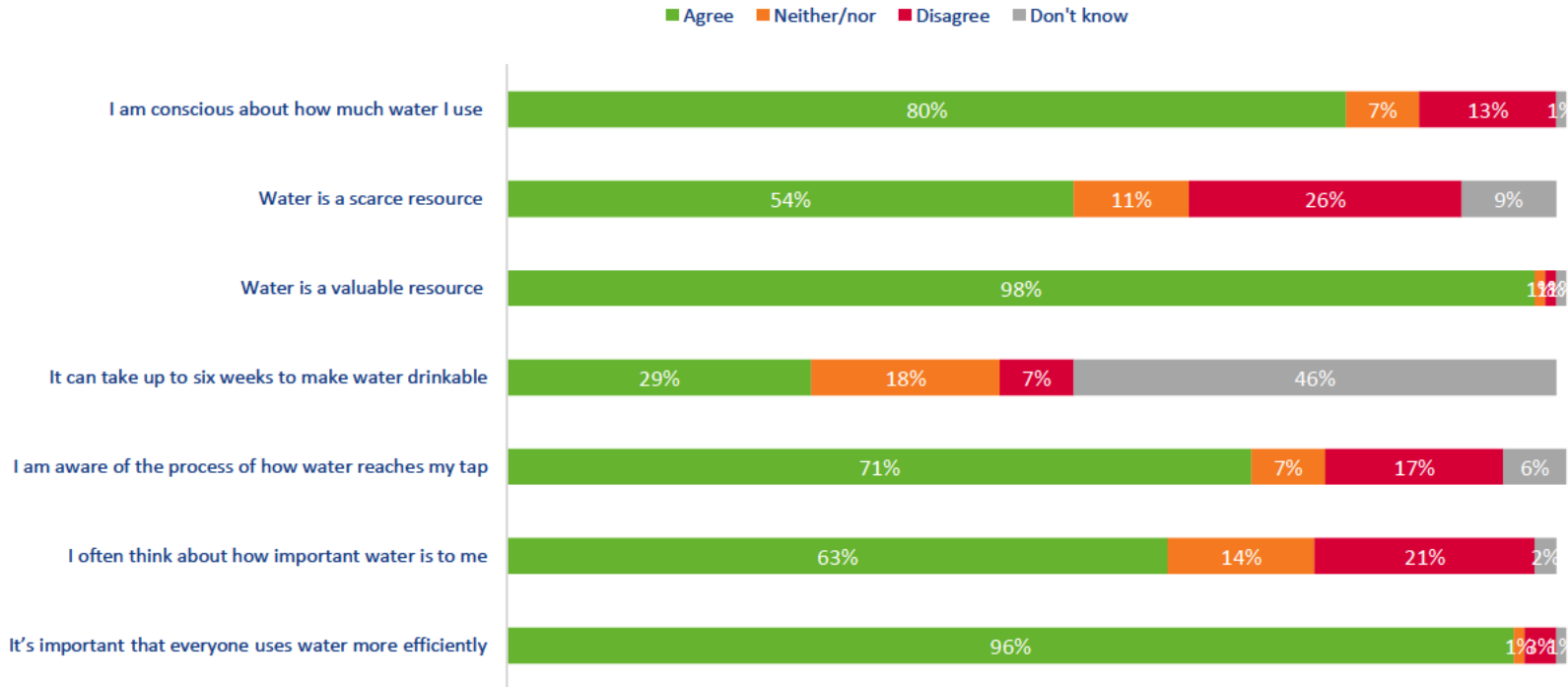
RESULTS – DEMOGRAPHIC AGREEMENT BREAKDOWN

Agreement with the following statements:
 (Demographics highlighted are where there is a significant statistical difference)

Description	More likely to agree	More likely to disagree
Tap water is clean, clear, and great tasting	65+ AB Direct Debit payers	-
Drinking tap water is good for your health	AB Direct Debit payers North	C1
I would choose tap water over other soft drinks	AB	-
Tap water is good value for money	Direct Debit payers	Non Direct Debit payers
Drinking tap water rather than bottled helps the environment	18-34/55-64 AB/C1	-
Reusable bottles are better than single use bottles, for drinking water from	55-64 AB Direct Debit payers	-
I think the water I use tastes nice	Direct Debit payers	55-64 Non Direct Debit payers
I think the water I use has no smell	Direct Debit payers	C1
NW/ESW drinking water tastes better than bottled water		18-34
NW/ESW drinking water tastes better than other parts of the UK I've visited	35-44/65+ Direct Debit payers North	C1/DE Essex

VALUE OF WATER – NOVEMBER 2021 RESULTS

Agreement with the following statements:



VALUE OF WATER – NOVEMBER 2021

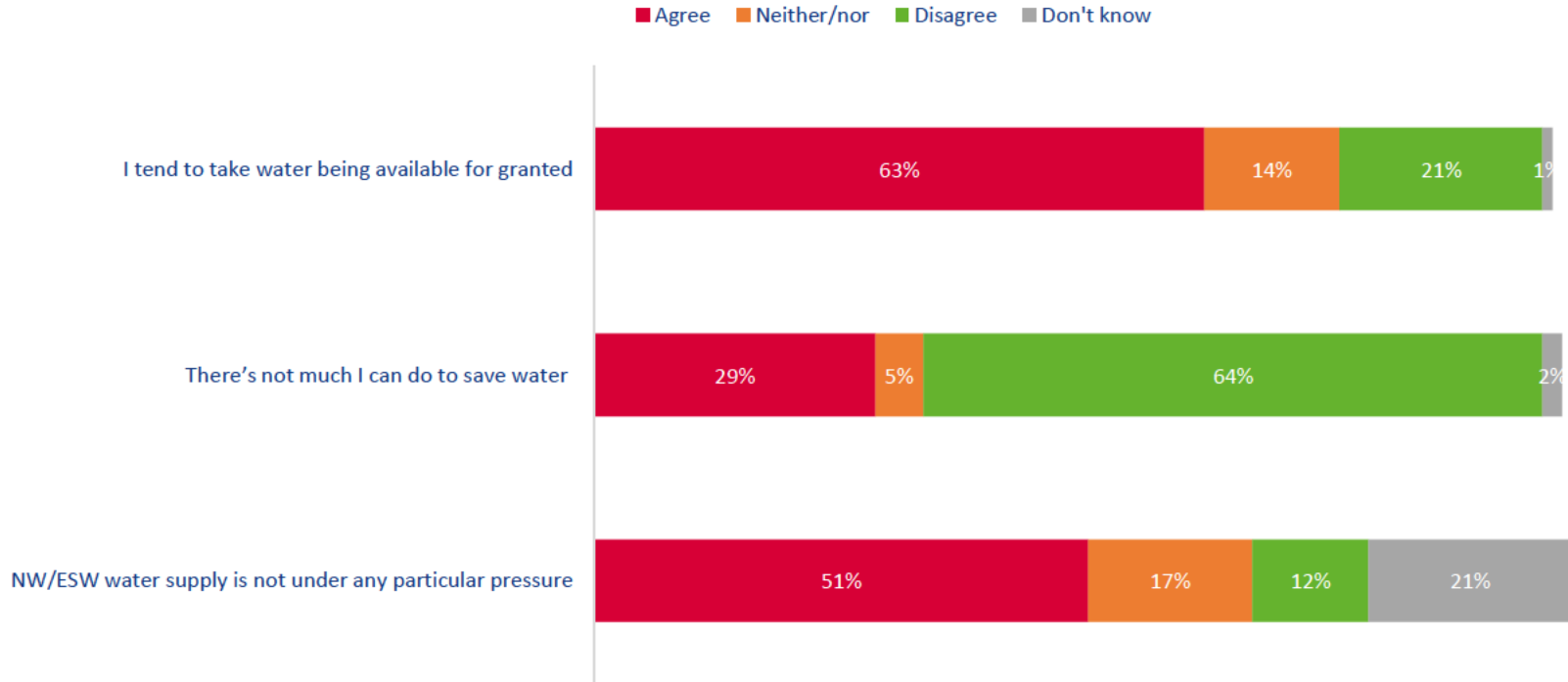
RESULTS – DEMOGRAPHIC AGREEMENT BREAKDOWN

Agreement with the following statements:
 (Demographics highlighted are where there is a significant statistical difference)

Description	More likely to agree	More likely to disagree
It's important that everyone uses water more efficiently	-	-
I often think about how important water is to me	55+ North	18-34 Males Essex
I am aware of the process of how water reaches my tap	35+ Males	18-34 AB/C1 Non Direct Debit payers
It can take up to six weeks to make water drinkable	-	-
Water is a valuable resource	45-54 C2	-
Water is a scarce resource	-	C1/C2 North
I am conscious about how much water I use	45+	18-34 AB/C1

VALUE OF WATER – NOVEMBER 2021 RESULTS

Agreement with the following statements:



VALUE OF WATER – NOVEMBER 2021

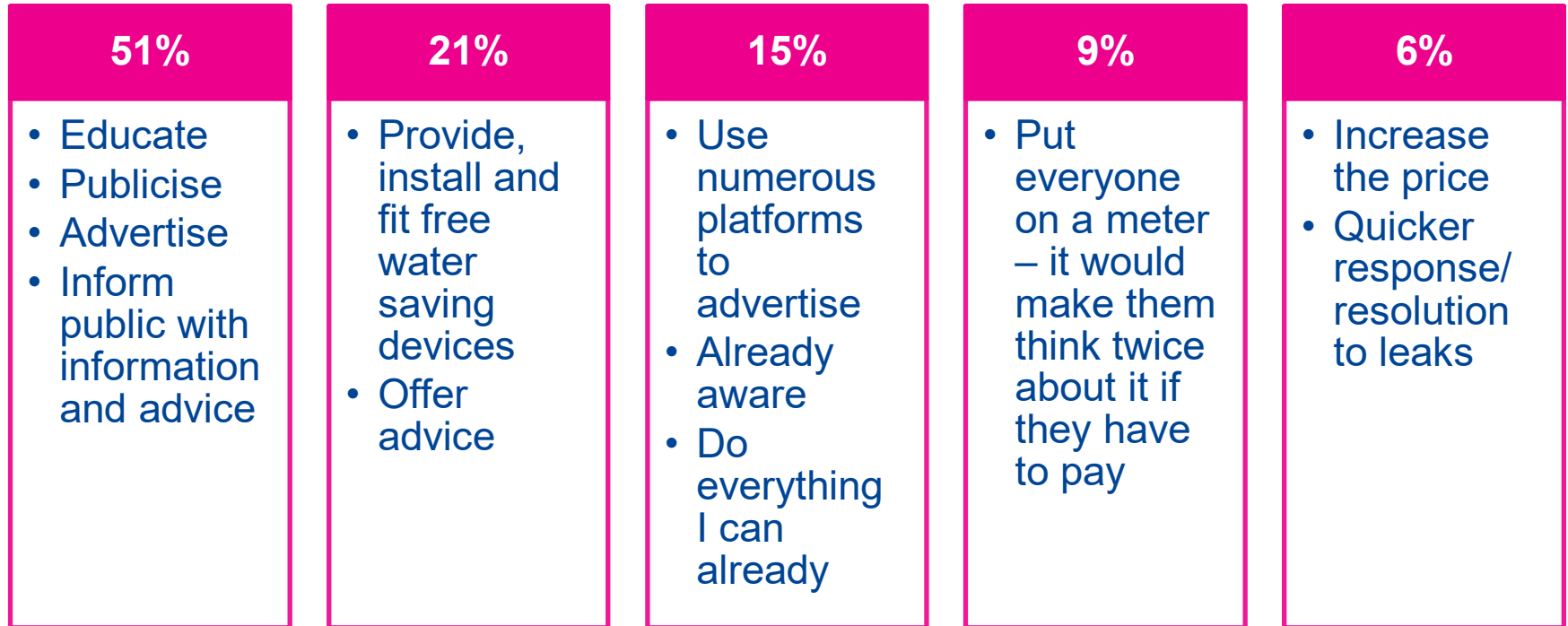
RESULTS – DEMOGRAPHIC AGREEMENT BREAKDOWN

Agreement with the following statements:
 (Demographics highlighted are where there is a significant statistical difference)

Description	More likely to agree	More likely to disagree
NW/ESW water supply is not under any particular pressure	65+	35-44/55-64 Direct Debit payers
There's not much I can do to save water	65+ C1/C2/DE	45-54 AB Direct Debit payers North
I tend to take water being available for granted	Direct Debit payers	C1

VALUE OF WATER – NOVEMBER 2021 RESULTS

If we told you your water supply is under pressure, what could NW/ESW do to encourage behaviour change around reducing your water usage?



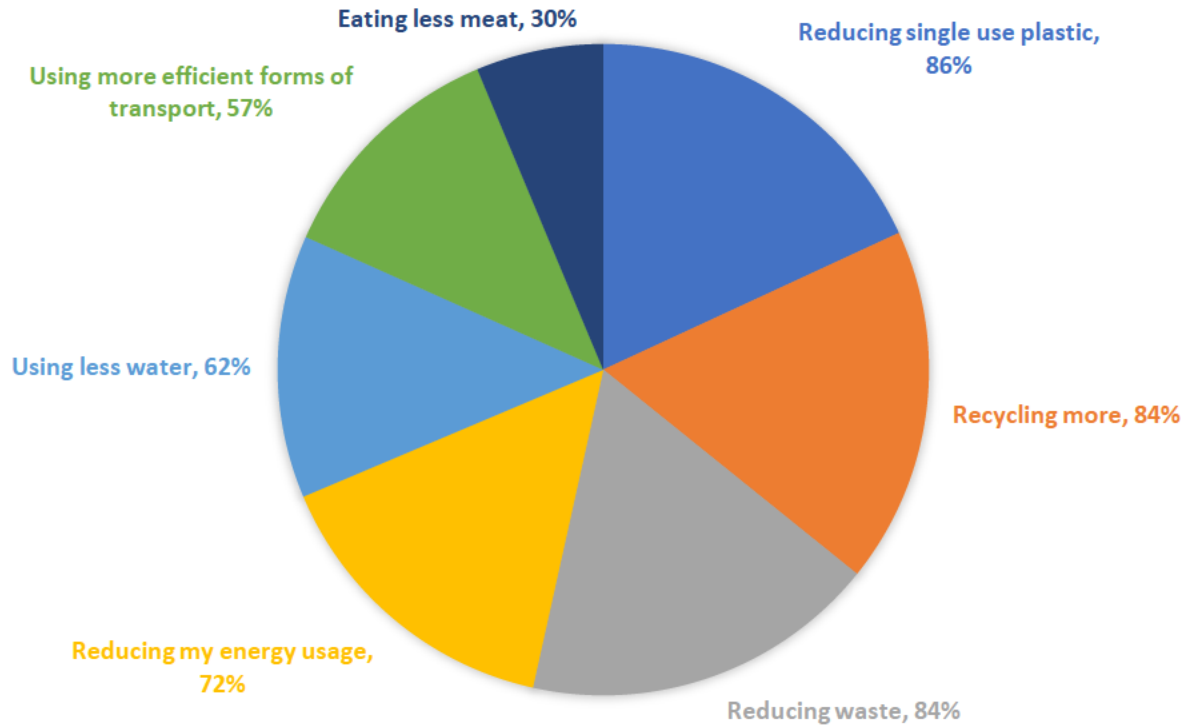
<3%

- Send data on number of flushes, white goods used
- Restrict usage/limited times etc
- Educate children/schools on how to help to reduce costs
- Incentives, rewards, discounts for saving water
- Impose hosepipe bans, no baths and showers only

- Provide information on the process of how water gets to the tap
- Improve water quality
- A memorable slogan/jingle for people to remember
- Provide information on how NW/ESW saves water

VALUE OF WATER – NOVEMBER 2021 RESULTS

Importance of the following seven statements using a scale of 0 to 10, where 0 is not at all important and 10 is very important:
(Percentages shown are for those who scored between 8 and 10)



VALUE OF WATER – NOVEMBER 2021

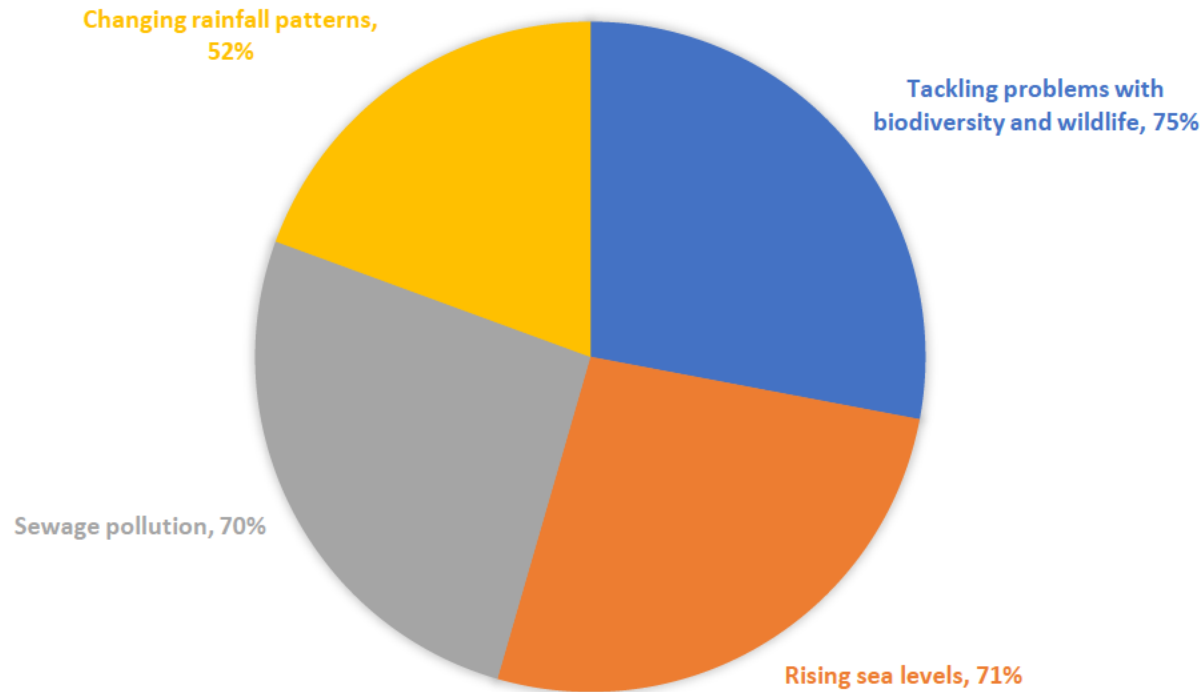
RESULTS – DEMOGRAPHIC AGREEMENT BREAKDOWN

Importance of the following statements:
 (Demographics highlighted are where there is a significant statistical difference)

Description	Important	Not important
Reducing single use plastic	Direct Debit payers Measured	-
Recycling more	45-54/65+ Females Not measured	-
Reducing waste	45+	-
Reducing my energy usage	55+ North	-
Using less water	45+ C2/DE Males North	-
Using more efficient forms of transport	45+	-
Eating less meat	55+	18-44 Males

VALUE OF WATER – NOVEMBER 2021 RESULTS

Importance of the following four issues, using a scale of 0 to 10, where 0 is not at all important and 10 is very important:
(Percentages shown are for those who scored between 8 and 10)



VALUE OF WATER – NOVEMBER 2021

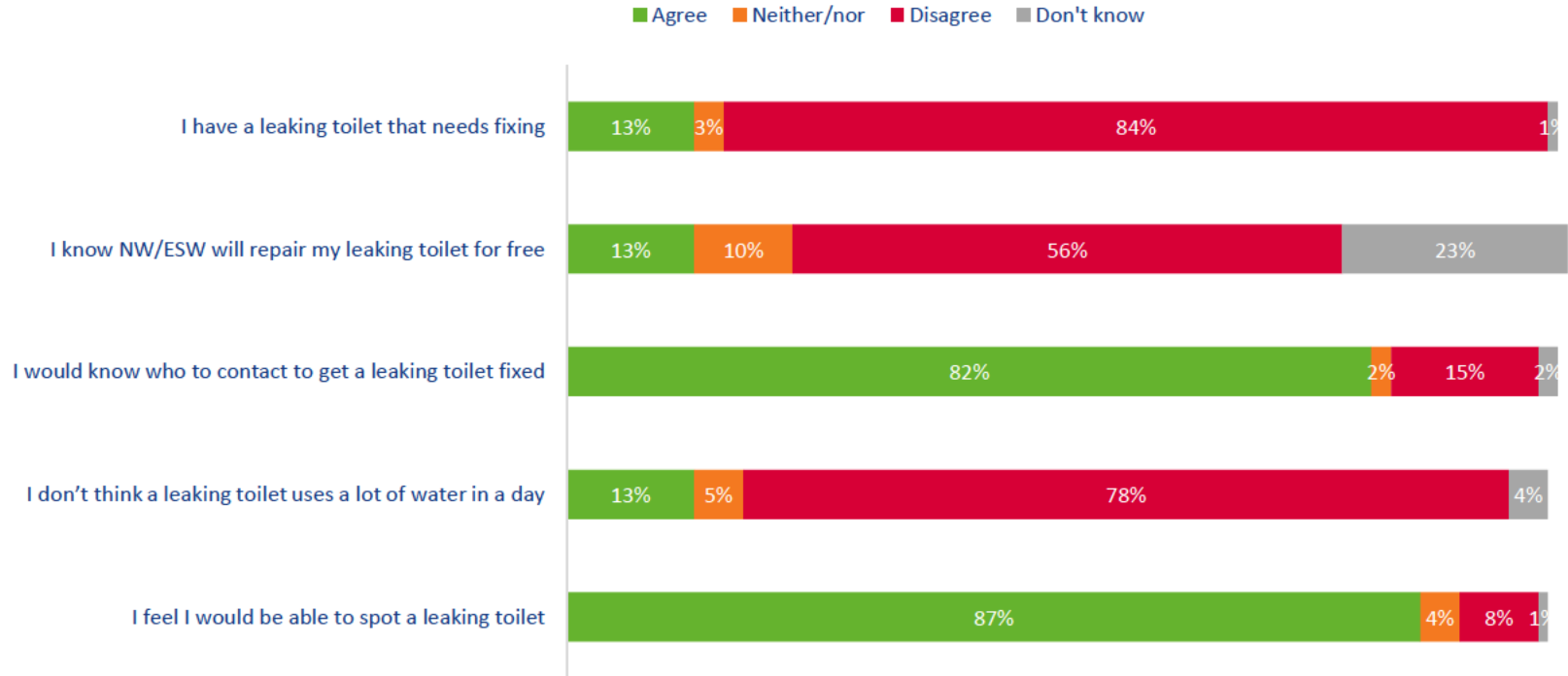
RESULTS – DEMOGRAPHIC AGREEMENT BREAKDOWN

Importance of the following statements:
 (Demographics highlighted are where there is a significant statistical difference)

Description	Important	Not important
Tackling problems with biodiversity and wildlife	55+ Unmeasured	-
Rising sea levels	45+	-
Sewage pollution	45+ Unmeasured	-
Changing rainfall patterns	45+ C1 Unmeasured	18-34 Males

VALUE OF WATER – NOVEMBER 2021 RESULTS

A leaky loo usually refers to clean water leaking from your cistern, down into your toilet bowl. Agreement with the following statements:



VALUE OF WATER – NOVEMBER 2021

RESULTS – DEMOGRAPHIC AGREEMENT BREAKDOWN

Agreement with the following statements:
 (Demographics highlighted are where there is a significant statistical difference)

Description	More likely to agree	More likely to disagree
I feel I would be able to spot a leaking toilet	45-54	-
I don't think a leaking toilet uses a lot of water in a day	-	C2
I would know who to contact to get a leaking toilet fixed	45-54/65+	35-44 Direct Debit payers
I know NW/ESW will repair my leaking toilet for free	65+ DE Non Direct Debit payers	45-54 AB/C1 Direct Debit payers
I have a leaking toilet that needs fixing	-	-

VALUE OF WATER – NOVEMBER 2021 RESULTS

Final comments (NW):

“Is there any chance of using salt water for household stuff etc. Purifying sea water for human use.”
82 year old male

“I’m on a meter and have an online account and know how to read my meter. I also have a valve fitted to my shower and an egg timer so I don’t spend longer than 3 minutes. I also have expanded crystal for the toilet cistern to reduce water usage and crystals with my plants so I don’t need to water them so much. Northumbrian Water sent all these to me. I live on my own so my water usage is extremely small. I know how to read my meter and how much my water usage is and that I am still in credit.”
69 year old male

“It’s very easy for us to take clean water and readily available clean water for granted. It’s like the light switch and the internet nowadays. The more that people can be reminded that water isn’t a magic event is not a bad thing. Emphasis on the benefit, and providing we have and the responsibility, we have to ensure this continues. In the North East where we have reservoirs it’s easy to have water flowing. More education on the work it is to make clean water and help people understand how people can save it. It’s hard to understand the saving of water if a leaky tap and a leaky loo doesn’t stop the loo from flushing. Basically if your system keeps working it’s hard to see there is a problem.”
42 year old male

“I do think its absolutely fine to do this research, but for me one important thing is start at the beginning, informing children and young people in schools about the importance of climate and to share information with them.”
74 year old male

“They must be worried if they are asking these questions. A lot of people think water is just there in abundance.”
52 year old male

“It’s important to save water, I just don’t know why people use bottled water when you have perfectly good water coming out of the tap.”
65 year old female

VALUE OF WATER – NOVEMBER 2021 RESULTS

Final comments (ESW):

“You just can't waste water use it as you want a lot of people just waste it. Gone into houses some of them leave taps on willy nilly what the hell are they doing, get a bowl of lukewarm water wash everything down and finish don't turn taps on all the time.”

80 year old female

“I think of the flooding in the area. I think Essex & Suffolk Water should be more involved in building of new properties. I don't think the property developers are keeping in contact with them. They are not updating the water systems to allow for the progress of new houses.”

58 year old female

“Reiterate they could prevent water wastage from leaking mains and invest more than they give to shareholders and spend more on water pipes and avoid sewage in the sea.”

74 year old male

“If the water companies can do their bit with everyone we should be on the right path, as I'm scared for what's gonna happen in 40 years.”

61 year old male

“I'd like some information on the services they provide, to avoid waste. I am not aware of these so they need to make customers more aware. I would spend money on a plumber (when not necessary).”

57 year old male

THANK YOU

December 2021