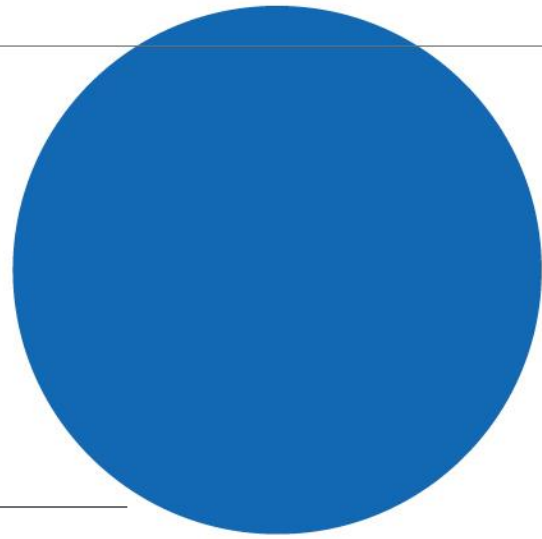
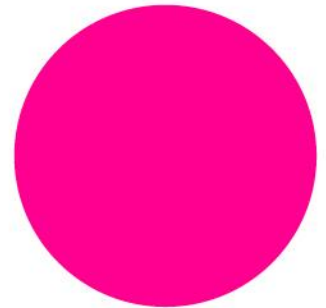
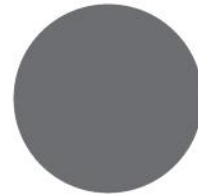

Prepared for:



Water Efficiency and Water Quality: ODI Tracker Survey



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Background

Water Efficiency and water quality

A measure to improve customer awareness as a result of delivering a targeted communication campaign on water quality and water efficiency within the home.

An initial survey in 2018 was used to assess and measure customer awareness associated with Water Efficiency and Water Quality messaging.

The reporting requirements, set out in the Performance Commitment specify question wording and measures to ensure sample set is reflective of the UU region (in terms of age, gender, region, metered/unmetered and urban/suburban). Surveys must be conducted at least annually, with a minimum sample of 1,000 customers per annum.

Purpose of Data

The measure monitors the increased awareness of customers to their impact on both water quality and water efficiency within their home, in terms of the percentage increase from the 2018 baseline.

Methodology

Drawing from a statistically representative sample of domestic customers (in terms of age, gender, region, metered/unmetered and urban/suburban) the survey is carried out;

- X 4 Waves per Financial Year
- Min 1, 000 responses per wave
- Web based survey.
- Sample is provided by United Utilities at the beginning of each wave.
- Geographic representation across the region
- Mix of Urban & Rural and Metered & Non-metered

Performance in each year is calculated as the average percentage awareness from all survey/s less the annual performance target.

In the ODI documentation (PR19 Final Determination; United Utilities – Outcomes performance commitment appendix) there are constraints associated with the wording of the question posed to customers, therefore to ensure consistency and adherence to the constraints, the same question sets will be used each time as per the text below:

- *Do you recall seeing or hearing anything about the following in recent months:
Water Efficiency?*
- *Do you recall seeing or hearing anything about the following in recent months:
Water Quality?*



Key insights:

Headline results – March 2023

Water Saving

- Amongst the general United Utilities customer base, unprompted awareness of water saving is 73% (a decrease of 6% points from the last wave).
- Unprompted (of people who are aware): United Utilities TV advertisements remains the highest unprompted channel (52%) followed by email (35%) and the United Utilities website (30%).
- Prompted: In difference to previous waves, highest recall this wave is for the United Utilities TV advert (50%) with the ITV weather sponsorship coming in at a close second (47%).

Water quality

- Unprompted: Water quality awareness – 29% (a decrease of 6% points on last wave).
- Unprompted (of people who are aware): Email is the highest unprompted channel this wave (35%), followed by TV (32%). In person events (1%) and digital adverts (5%) continue to be the lowest unprompted channels this wave.
- Prompted: Awareness of direct comms is highest this wave (11%), with customers being less familiar with water quality information / communications from the United Utilities website (7%) and on social media (5%).



Key insights:

Headline results – September 2022

Water Saving

- Amongst the general United Utilities customer base, unprompted awareness of water saving is **79%** (An increase of 6% points, a continued increase from the jump seen last wave).
- Unprompted (of people who are aware): TV remains the highest unprompted channel (54%) with email behind (42%).
- Prompted: Again, weather sponsorships has the highest recall (53%) with 'press' just behind on 47%. Tv spot on 44% prompted recall.

Water quality

- Unprompted: Water quality awareness – **35%** (a slight increase of 3% points on last wave).
- Unprompted (of people who are aware): TV awareness (43%) has remained the most recalled. An increase of 5% points on the last wave.
- Prompted: Awareness of website comms and direct comms are relatively stable (11% and 16% respectively). The newest question on social media creatives has a recall of 8% - in line with previous wave.



Key insights:

Headline results – August 2022

Water saving

- Amongst the general United Utilities customer base, unprompted awareness of water saving is **73%** (a 16%-point increase from the last wave).
- Unprompted (of people who are aware): TV the highest unprompted channel (TV 59% - Up 19% points from the last wave).
- Prompted: Weather sponsorships has the highest recall (51% - up 8% points on the last wave) whilst the TV advertisement is just behind (46% -up 4% points from the last wave, the first wave it was shown). Email has returned to 27%.

Water quality

- Unprompted: Water quality awareness – 32% (Same as last wave)
- Unprompted (of people who are aware): United Utilities website seeing a 5%-point drop in channel awareness (now 15%), TV awareness has remained steady at 38%.
- Prompted: Awareness of website comms and direct comms are relatively stable (14% and 17% respectively). The new question on social media creatives has a recall of 10%.



Key insights:

Headline results – July 2022

Water saving

- Amongst the general United Utilities customer base, unprompted awareness of water saving is 57% (relatively stable, down 2% from last wave).
- Unprompted (of people who are aware): TV the highest unprompted channel, previously this had been United Utilities website and email (TV 40% - Up 4% from last wave), (United Utilities website – down 7% from last wave), (Email – down 4% from last wave).
- Prompted: Weather sponsorships has the highest recall (43% - down 5% on last wave) whilst the TV advertisement is just behind (42% - new to this wave).
- Email has seen the most dramatic change with a 7% drop from the last wave (now 20%).

Water quality

- Unprompted: Water quality awareness – 31% (Same as last wave).
- Unprompted (of people who are aware): United Utilities website seeing a 10% drop in channel awareness (now 20%), TV awareness up 7% from the last wave (now 38%).
- Prompted: Awareness of website communications is relatively stable whilst direct communications is down 5% (now 17%).

Headline Scores from previous waves:

	Main sample	Saving Water (%)	Water Quality (%)
Wave 1	Mar-21	50%	22%
Wave 2	May-21	48%	19%
Wave 3	Jul-21	41%	20%
Wave 4	Sep-21	70%	33%
Wave 5	Nov-21	73%	39%
Wave 6	Mar-22	58%	31%

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