

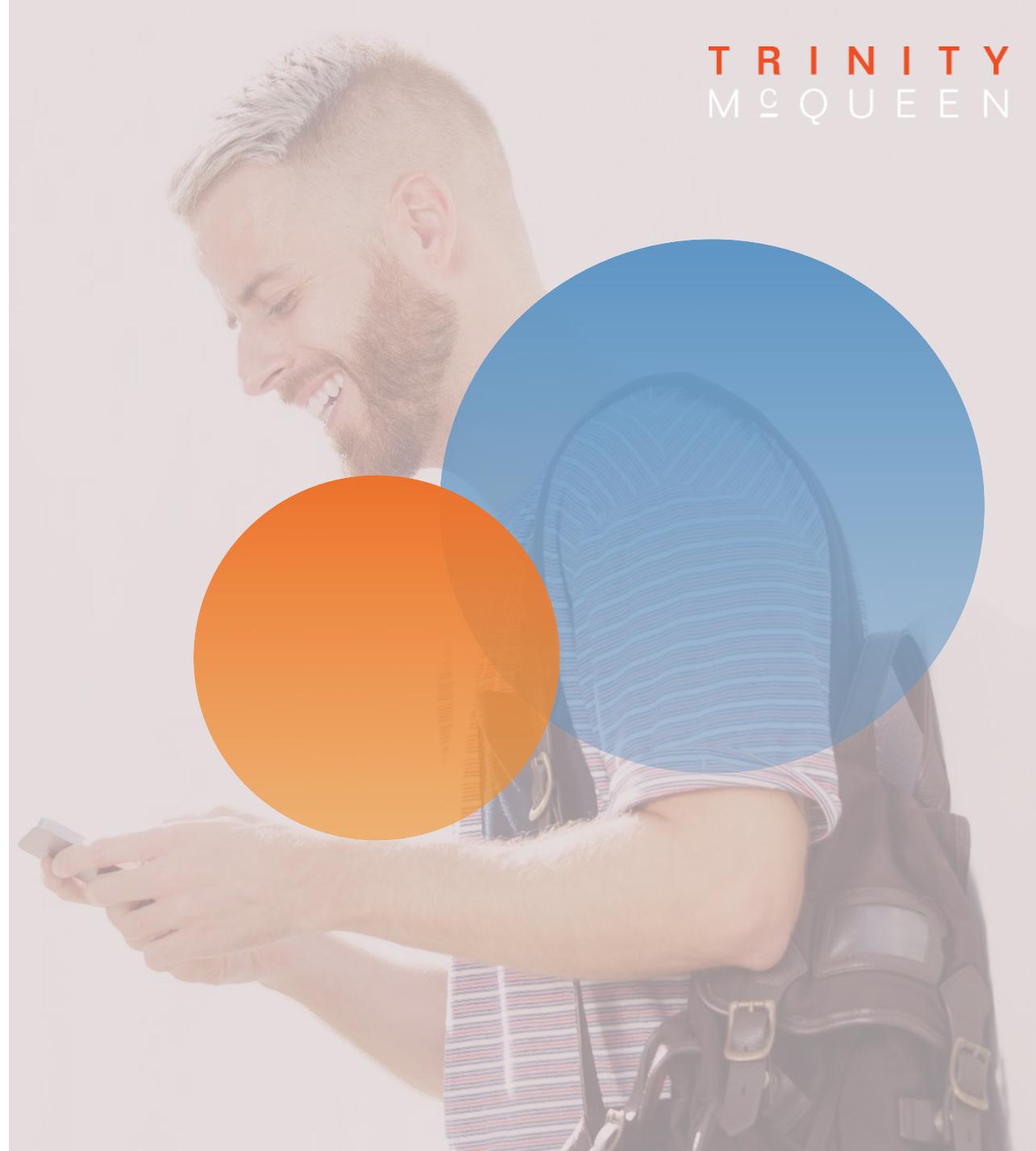
Q1'22 Domestic Tracker

NWG

27/04/22

Contents

Introduction	3
NPS	4-8
Overall satisfaction	9-15
Company suggestions and preferences	16-19
Brand values	20-24
Information and services	25-27
Priority services	28-31
Progress and targets	32-37



Introduction

Aim: To measure satisfaction with and perceptions of customers in NWG's regions and their water (and sewerage) service

On-going research programme among household customers, to monitor satisfaction with and perceptions of their water (and sewerage) service

Carried out by phone - 500 interviews per quarter

Sample provided by NWG and TPS-screened before use

Quotas set to achieve: 316 NW, 184 ESW

Gender and age to match the homeowner population

Fieldwork dates: 2nd March – 20th April 2022

Average interview length: 17 min

Location	Interviews
North	318
Essex	182
TOTAL	500

Covering this wave:

- Likelihood to recommend, with reasons
- Overall satisfaction and satisfaction with value for money
- Satisfaction with specific aspects of the service, what the company does well and suggestions for improvement
- Contact and preferences for contact channels
- Trust and other brand values measures
- Awareness and usage of support services

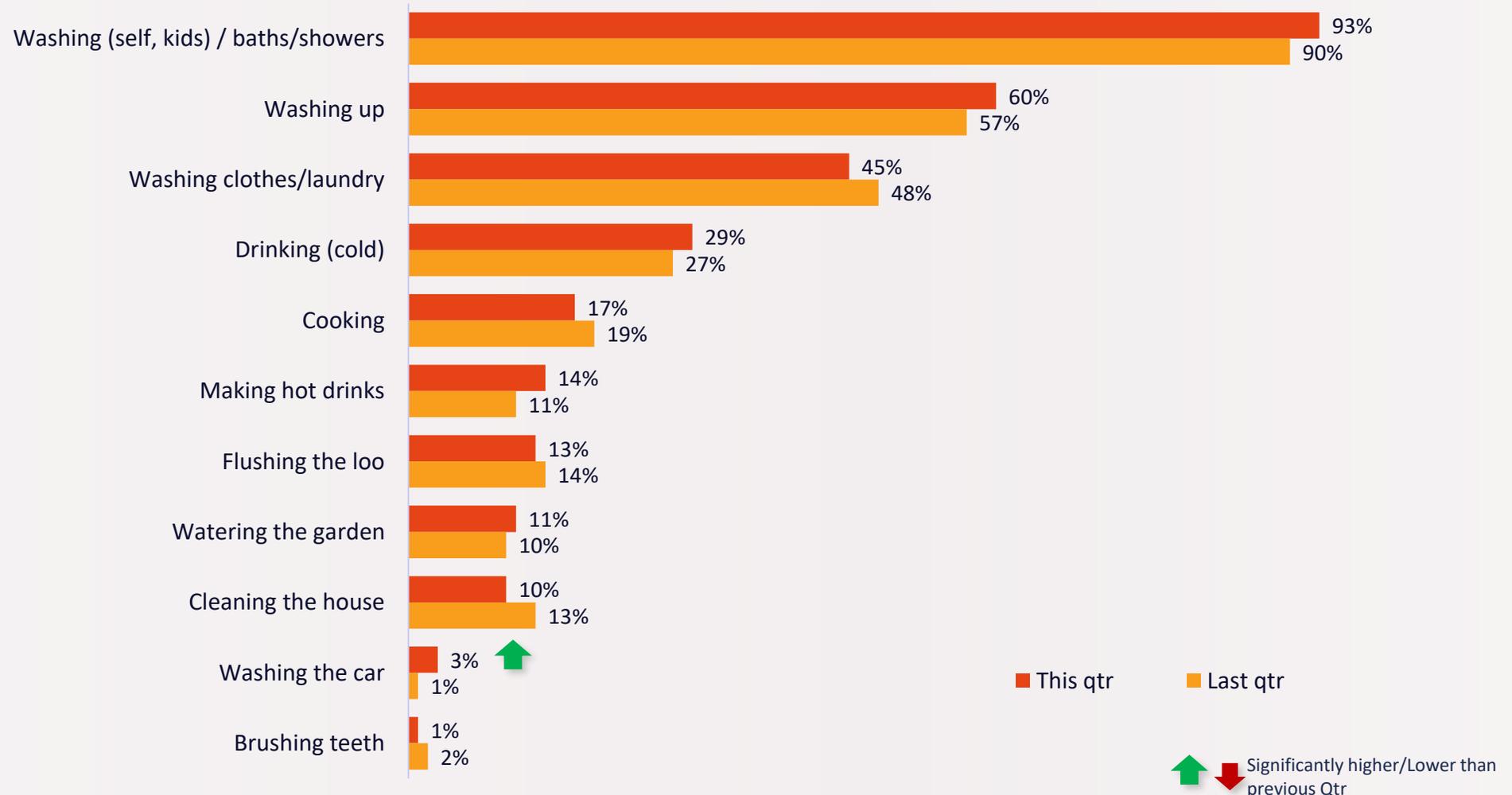
NPS



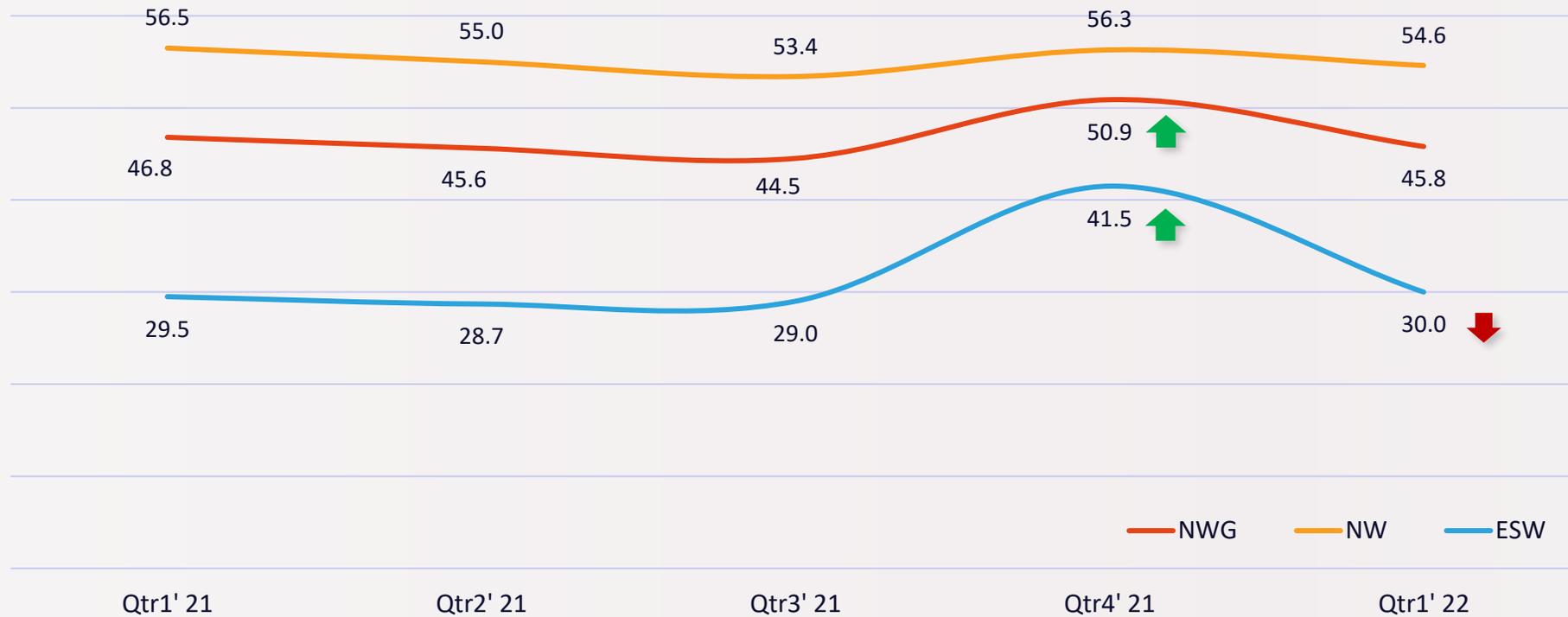
NWG
living water

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

First 3 things that come to mind, when thinking about using water at home



NPS since this quarter last year



  Significantly higher/Lower than previous Qtr

Q1a If people could choose their water provider, how likely would you be to recommend [Northumbrian Water/Essex & Suffolk Water] to friends or family, using a scale of 0 to 10 where 0 is 'not at all likely' and 10 is 'extremely likely'? Base NWG (500), NW (318), ESW (182)

Top reasons for NPS scores this wave

Promoters (scores of 9-10) - 284 customers

- No problems (59%)
- No supply problems (16%)
- Good water quality (9%)
- Good experience/happy with them (9%)
- Good/fair price/good value (8%)
- Informed/alerted of any issues/works (8%)
- Good service/customer service (7%)
- Quick response/resolution (7%)
- Been with them for years (7%)
- Helpful (6%)
- Good billing system - timely/accurate (5%)
- Good company/do a good job (4%)
- Handled well/always deal with issues (3%)
- Good communication/updates/follow-ups/return calls (2%)
- Easy/straightforward (2%)
- Reliable/trustworthy (2%)
- Resolve problems (2%)
- Informative/answer questions/advise (2%)
- No reason not to (2%)

Passives (scores of 7-8) – 123 customers

- No problems (47%)
- Good service/customer service (11%)
- No supply problems (11%)
- Informed/alerted of any issues/works (8%)
- Good experience/happy with them (7%)
- Quick response/resolution (5%)
- Good water quality (5%)
- Expensive (5%)
- Ok/fine/satisfied (5%)
- Good/fair price/good value (4%)
- Resolve problems (3%)
- Good company/good in general/do a good job (3%)
- Always room for improvement (3%)
- Other (3%)
- Good communication/updates/follow-ups/return calls (2%)
- No reason not to (2%)
- **Nothing to compare against/no choice/had no real dealings with them (20%)**

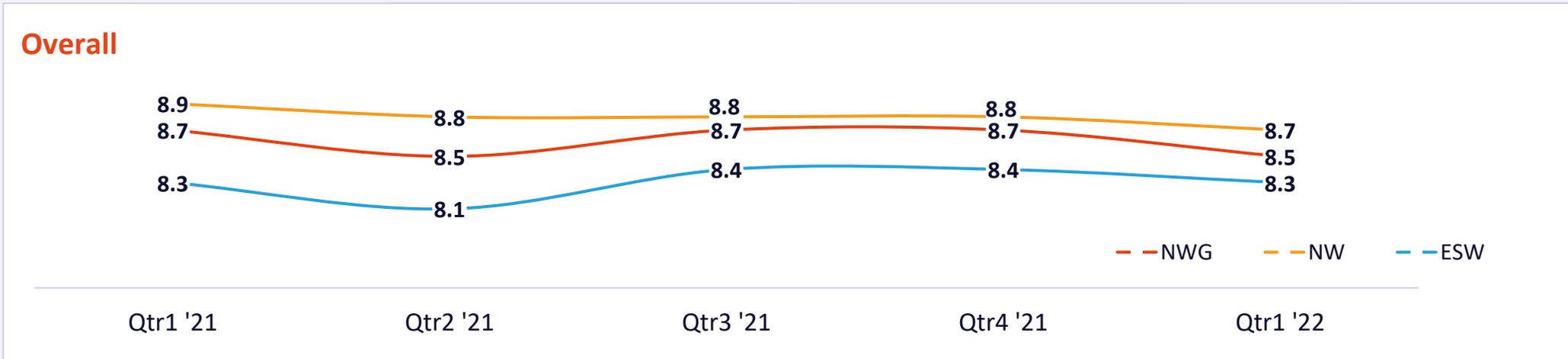
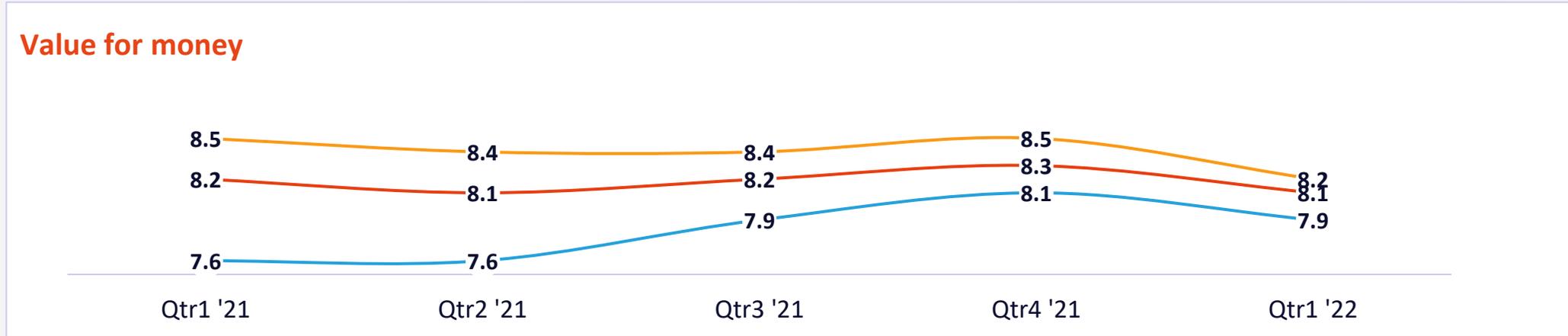
Detractors (scores of 0-6) – 67 customers

- Expensive (13%)
- Poor water quality (12%)
- No supply problems (7%)
- Other (7%)
- No problems (6%)
- Improvements needed to billing system - clearer/accurate-read meters/timely (6%)
- Neutral/indifferent (6%)
- Would look for best price (4%)
- Only interested in profit (4%)
- Slow to respond to issues (4%)
- Poor experience with them (4%)
- Good/fair price/good value (3%)
- Poor communication/don't return calls/updates (3%)
- Don't/won't take responsibility/refused to do anything (3%)
- **Nothing to compare against/no choice/had no real dealings with them (31%)**



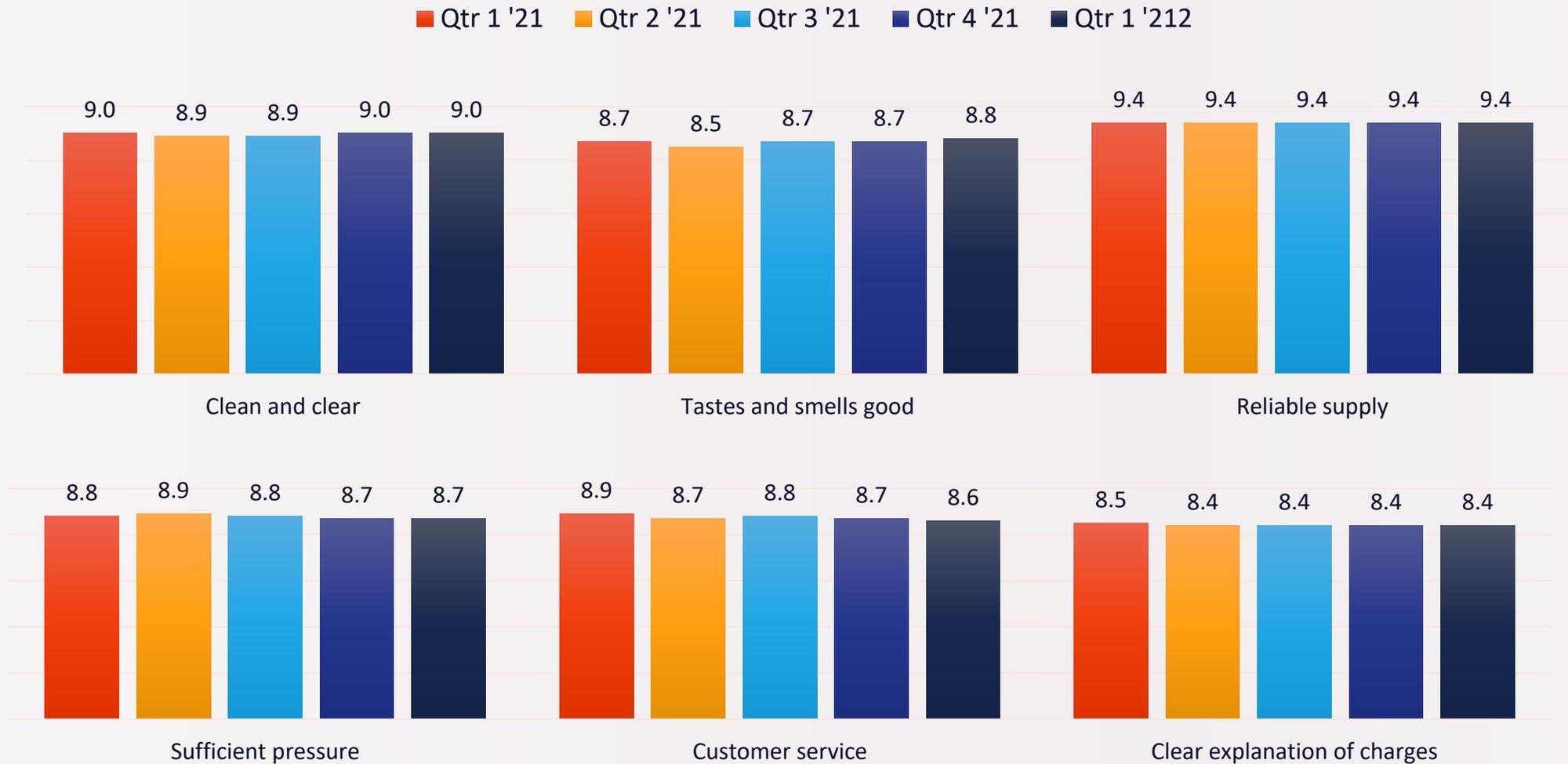
Overall Satisfaction

Overall satisfaction and with Value for Money, since this quarter last year



Q2 How satisfied would you say you are with [Northumbrian Water/Essex & Suffolk Water], in terms of value for money for the service they provide? Please give me a score from 0-10, this time where 0 means very dissatisfied and 10 means very satisfied. Q3 And on the same scale, how satisfied are you overall with [Northumbrian Water/Essex & Suffolk Water]? Base NWG (500), NW (318), ESW (182)

Service satisfaction 1 (NWG)





 Significantly higher/Lower than previous Qtr

Service satisfaction 1 (by region)

Clean and clear	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	9.1	9.1	9.1	9.2	9.1
ESW	8.7	8.6	8.7	8.8	8.9
Tastes and smells good	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.8	8.7	8.8	8.8	8.8
ESW	8.6	8.1	8.4	8.4	8.7
Reliable supply	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	9.5	9.4	9.4	9.5	9.4
ESW	9.2	9.2	9.3	9.3	9.4

  Significantly higher/Lower than previous Qtr

Q4 I am now going to read out a number of aspects of [Northumbrian Water/Essex & Suffolk Water]’s service, and I’d like you to tell me how satisfied you are, with each. Please use our scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied. Base NWG (500) NW (318) ESW (182)

Service satisfaction 1 (by region)

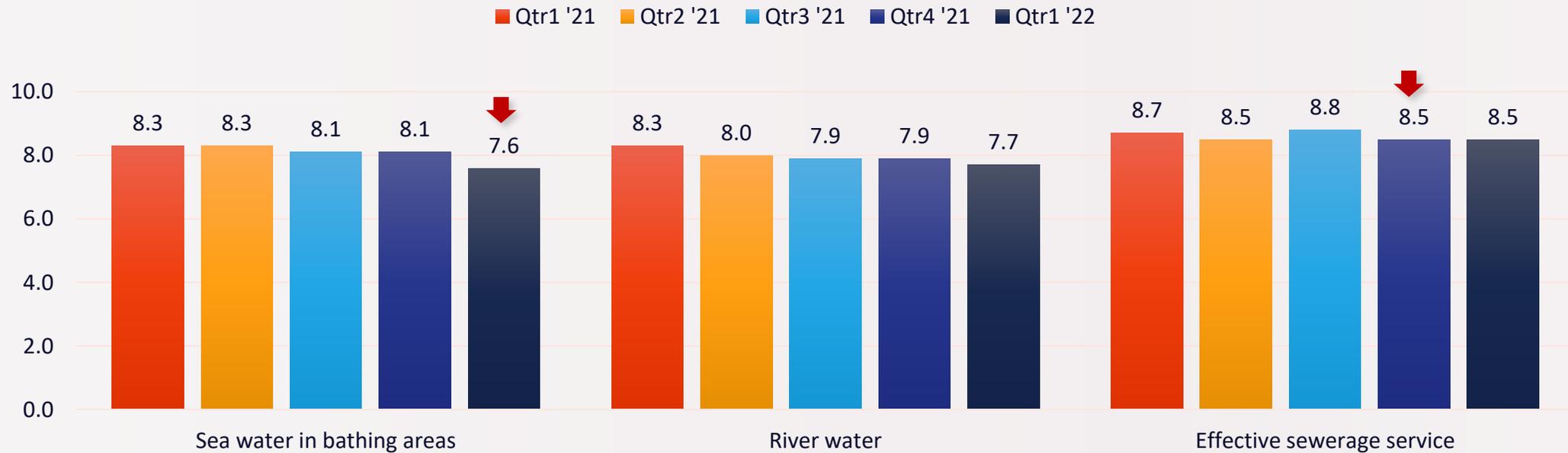
Sufficient pressure	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.9	9.0	8.9	8.9	8.8
ESW	8.5	8.6	8.6	8.4	8.4
Customer service	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	9.1	8.9	8.9	8.7	8.8
ESW	8.4	8.2	8.7	8.7	8.2 ↓
Clear explanation of charges	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.8	8.6	8.6	8.5	8.5
ESW	8.1	8.0	8.2	8.3	8.2



 Significantly higher/Lower than previous Qtr

Q4 I am now going to read out a number of aspects of [Northumbrian Water/Essex & Suffolk Water]’s service, and I’d like you to tell me how satisfied you are, with each. Please use our scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied. Base NWG (500) NW (318) ESW (182)

Service satisfaction 2 (NW)



↑ Significantly higher/Lower than previous Qtr
↓

Q4 I am now going to read out a number of aspects of [Northumbrian Water/Essex & Suffolk Water]’s service, and I’d like you to tell me how satisfied you are, with each. Please use our scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied. Base NW (318)

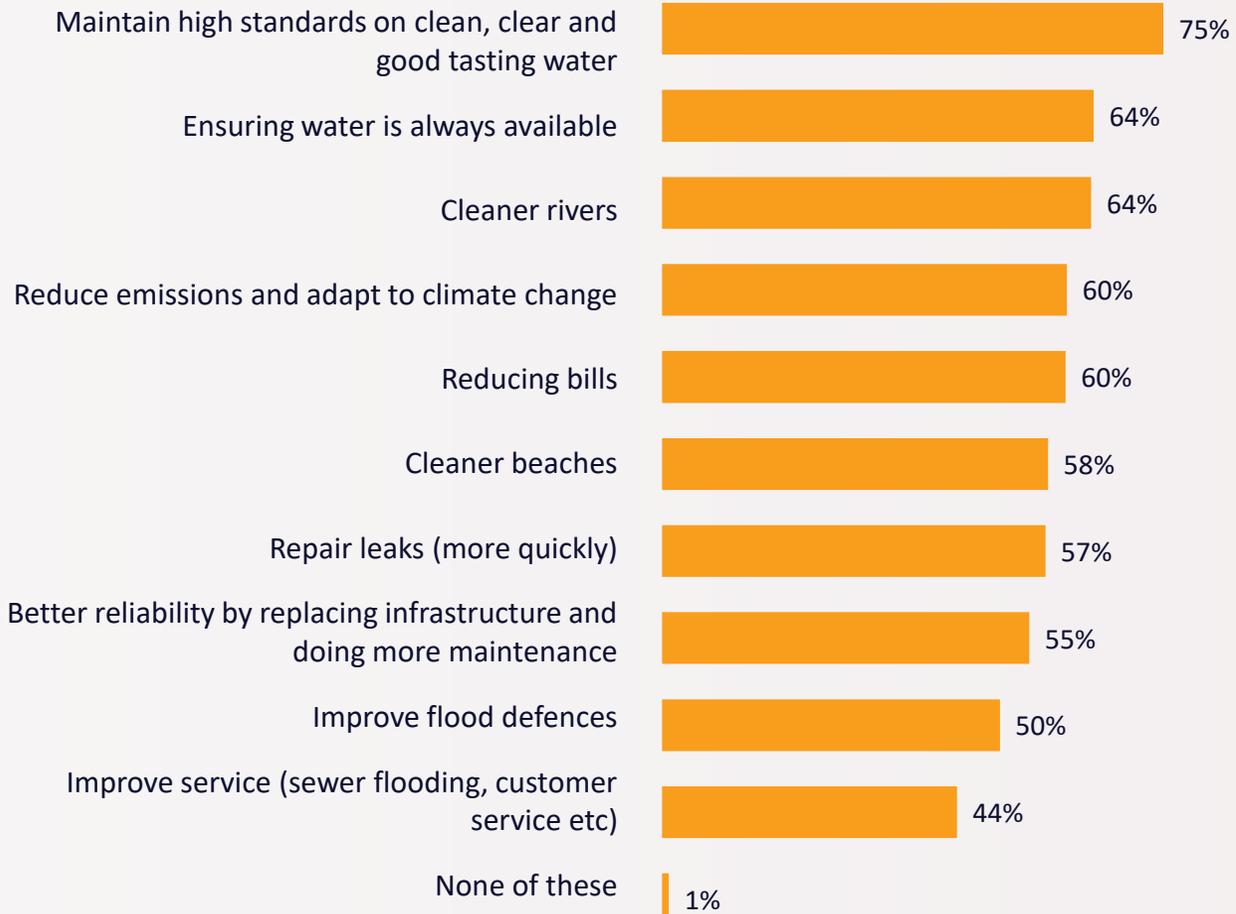
Top improvements required on service issues

Gave any low scores (0-6) - 174 customers

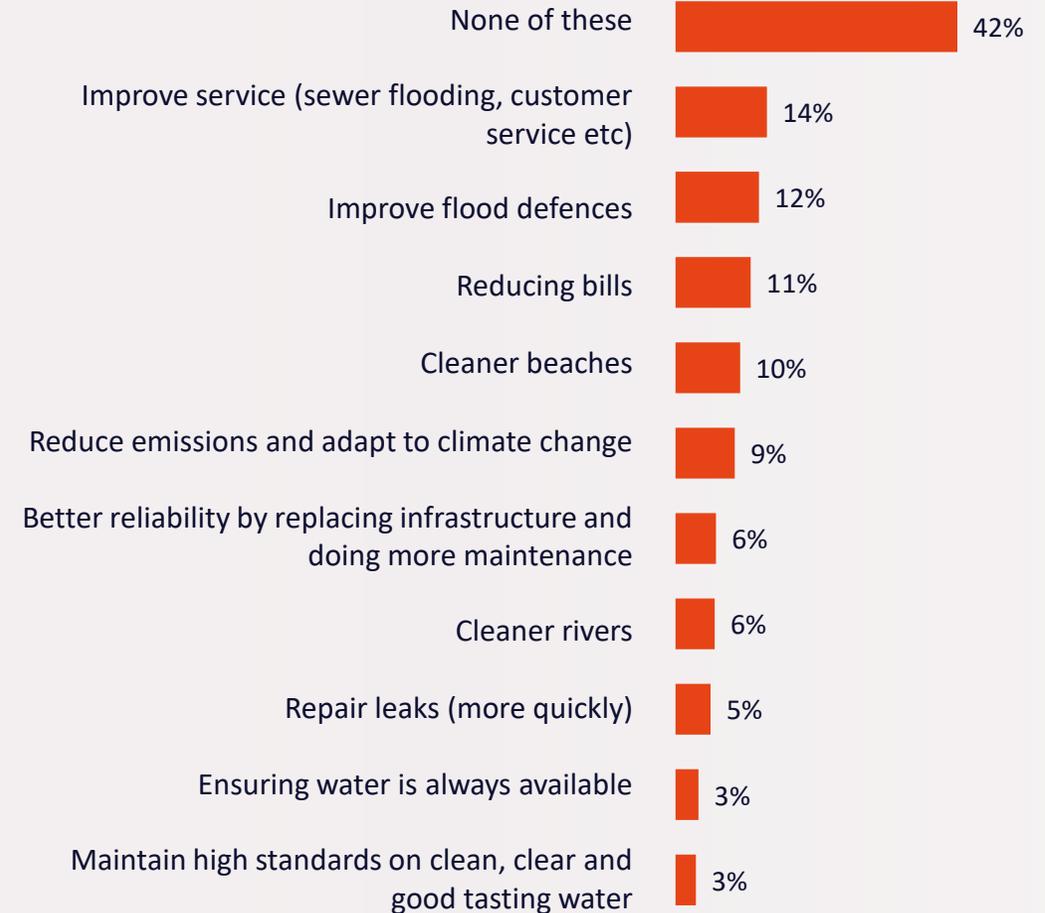
- Any improvements mentioned (78%)
- Improve quality/taste/smell of water (18%)
- Cleaner rivers (14%)
- Improve water pressure (14%)
- More detail/clarity on charges (10%)
- Better ongoing sewer/pipes maintenance (9%)
- Replace old infrastructure/improve capacity (7%)
- More accurate bills/read meters more often (5%)
- Cleaner beaches (5%)
- Reduce prices (3%)
- Quicker resolution of issues/problems (3%)
- More information on their services/what they do (2%)
- Better/more communication - updates/follow ups/general contact (2%)
- Transparency - bills/water quality (2%)
- Repair leaks (more quickly) (2%)
- Improve flood defenses (2%)
- Easier to contact/less time on hold - more staff (2%)
- Quicker response to issues (2%)

Priority areas (NWG)

Top Priority Areas

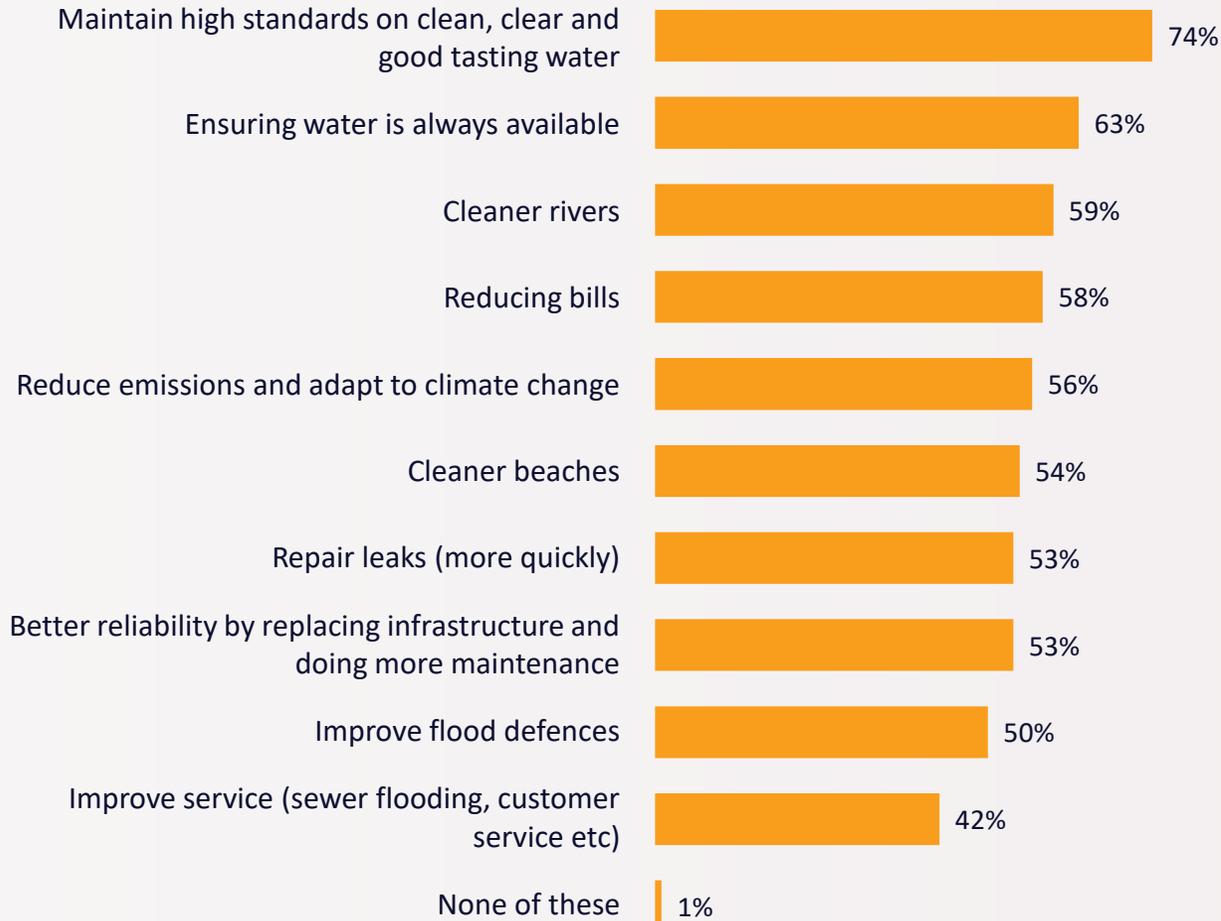


Less important priority areas

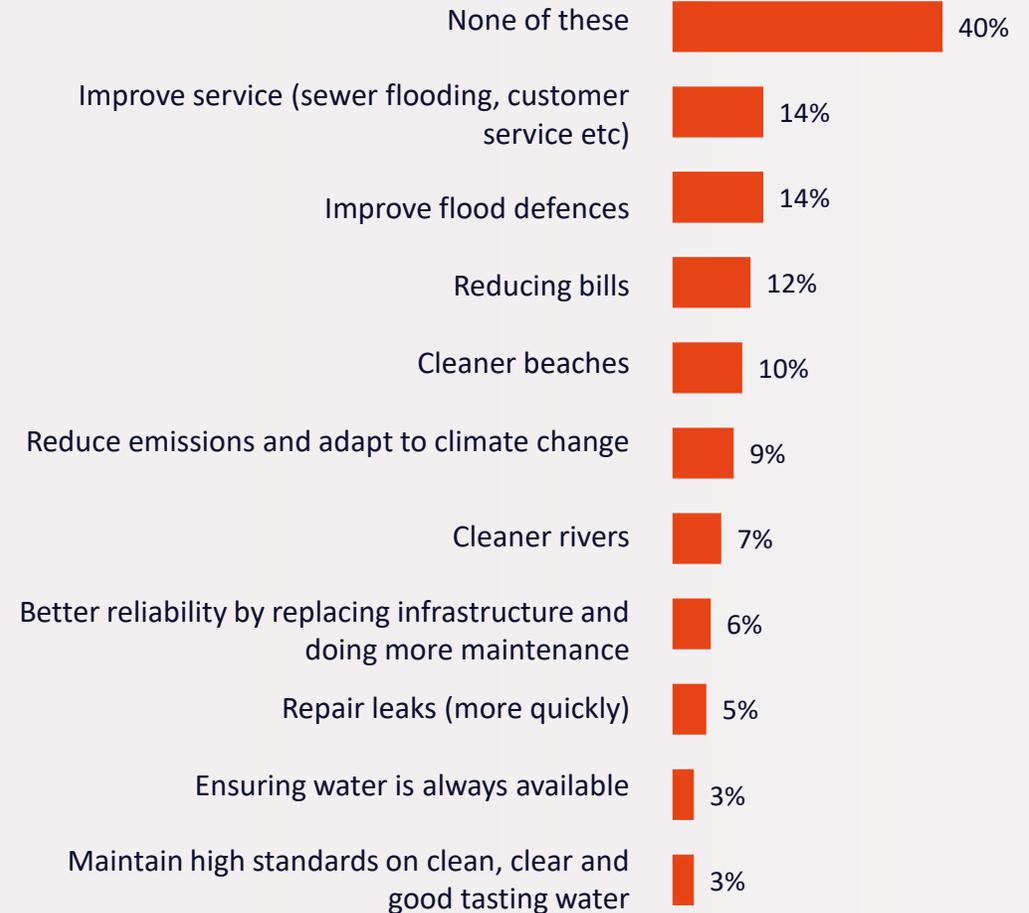


Priority areas (NW)

Top Priority Areas

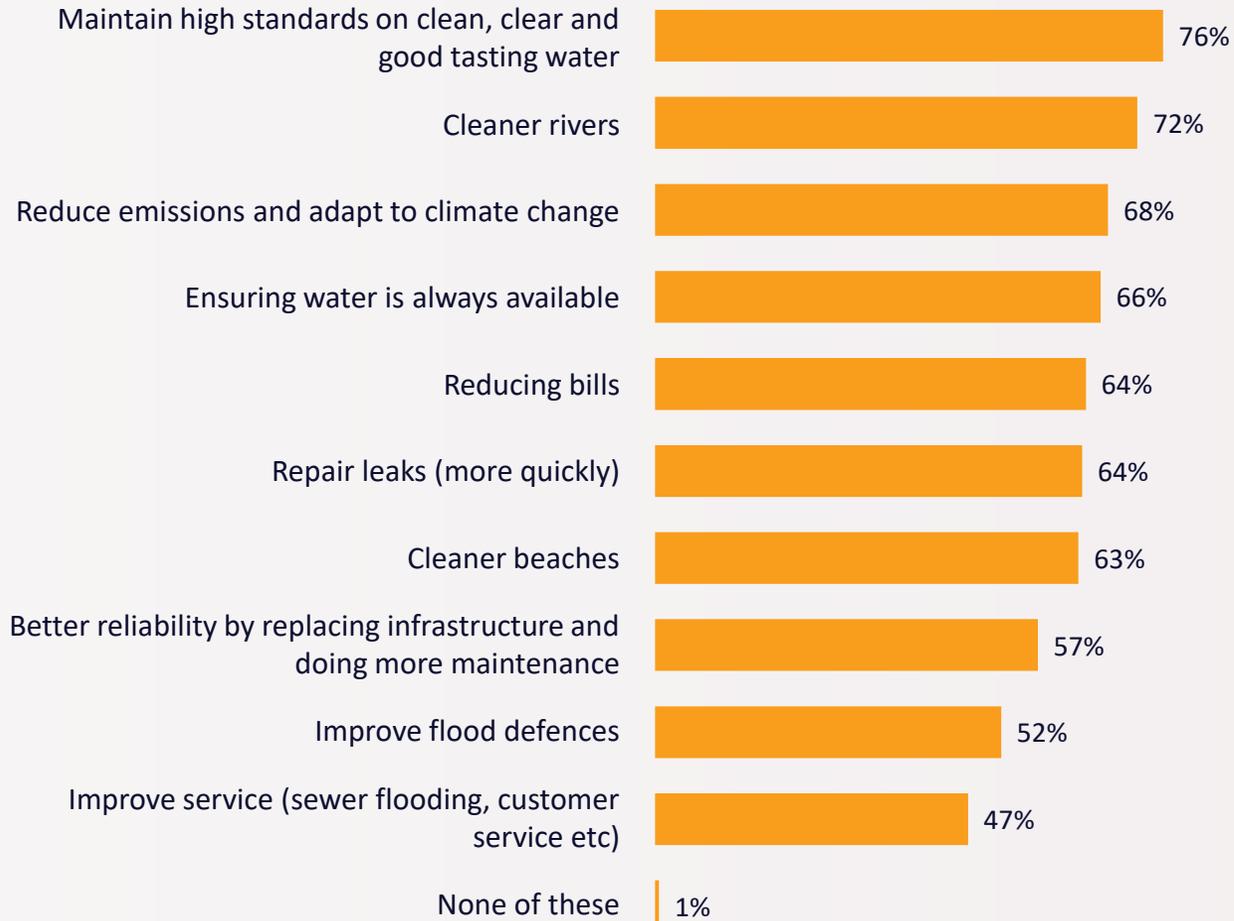


Less important priority areas

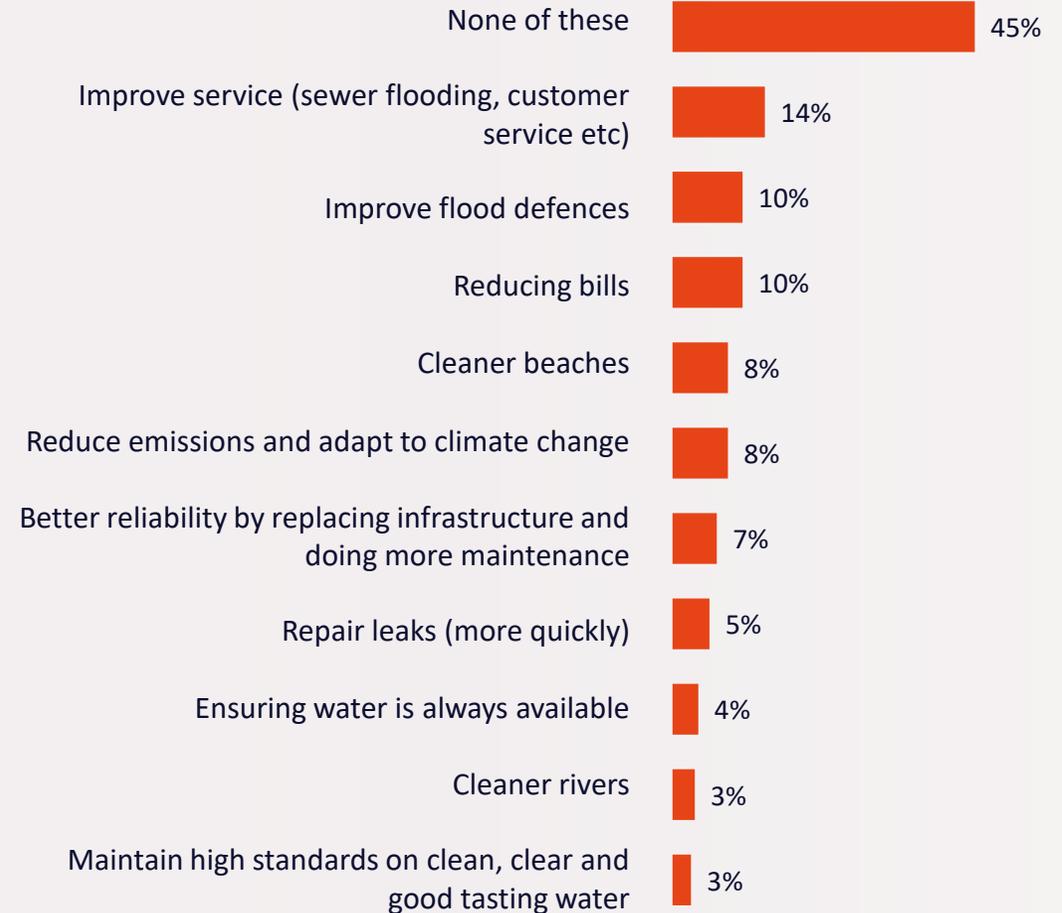


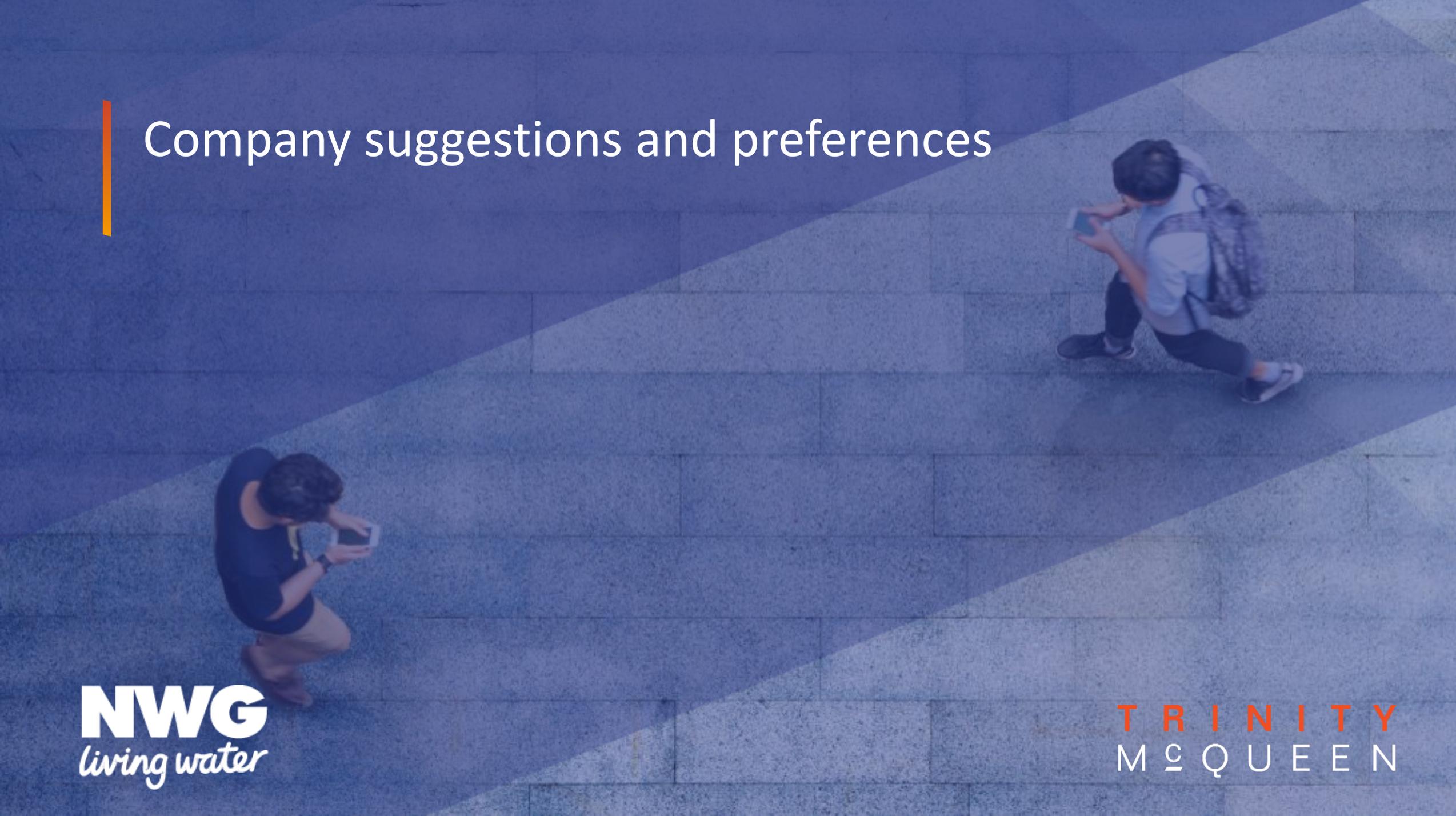
Priority areas (ESW)

Top Priority Areas



Less important priority areas





Company suggestions and preferences

What the company does well



All respondents - 500 customers

Top 15

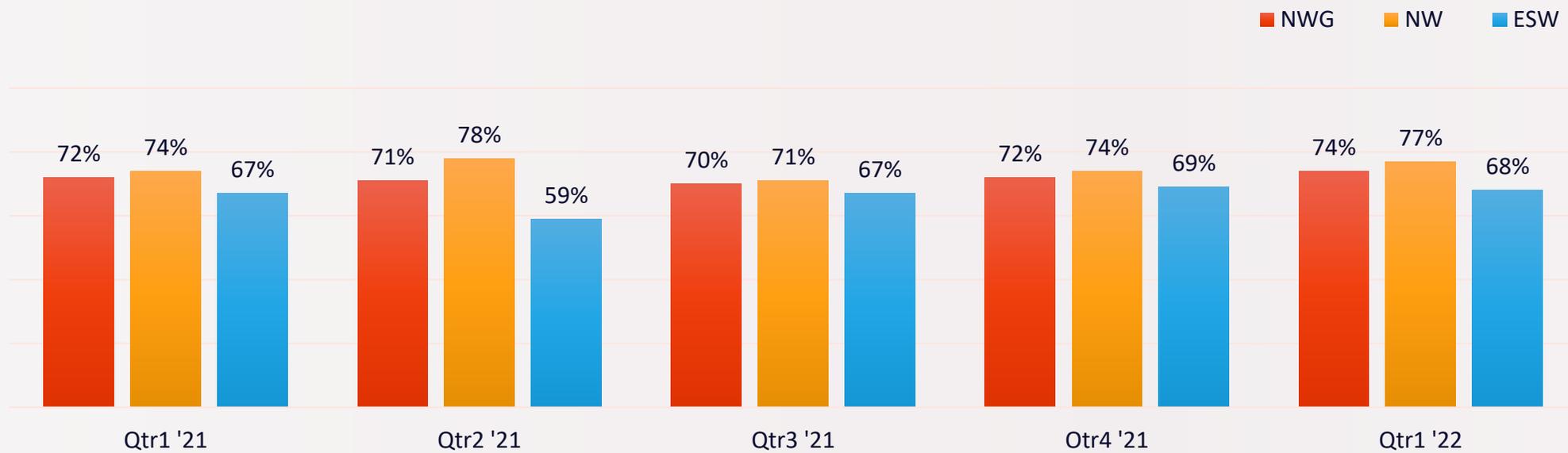
- Reliable supply of water (44%)
- Good quality water/tastes/smells good (27%) ↑
- Respond quickly to issues/problems (11%)
- Never had any problem/never need to contact them (9%)
- Helpful/friendly/professional call centre staff (7%)
- Good customer service (6%)
- Keep customers informed of progress on issues raised (7%)
- Repair leaks quickly (4%)
- Notify customers if there are going to be works (3%)
- Good water pressure (3%)
- Timely/accurate bills (3%)
- Fair prices (3%)
- Helpful/friendly engineers (2%)
- Good ongoing maintenance of sewers/pipes (2%)
- Easy to contact (1%)

↑ ↓ Significantly higher/Lower than previous Qtr

Note: results are re-based to exclude any respondents who do not express a preference

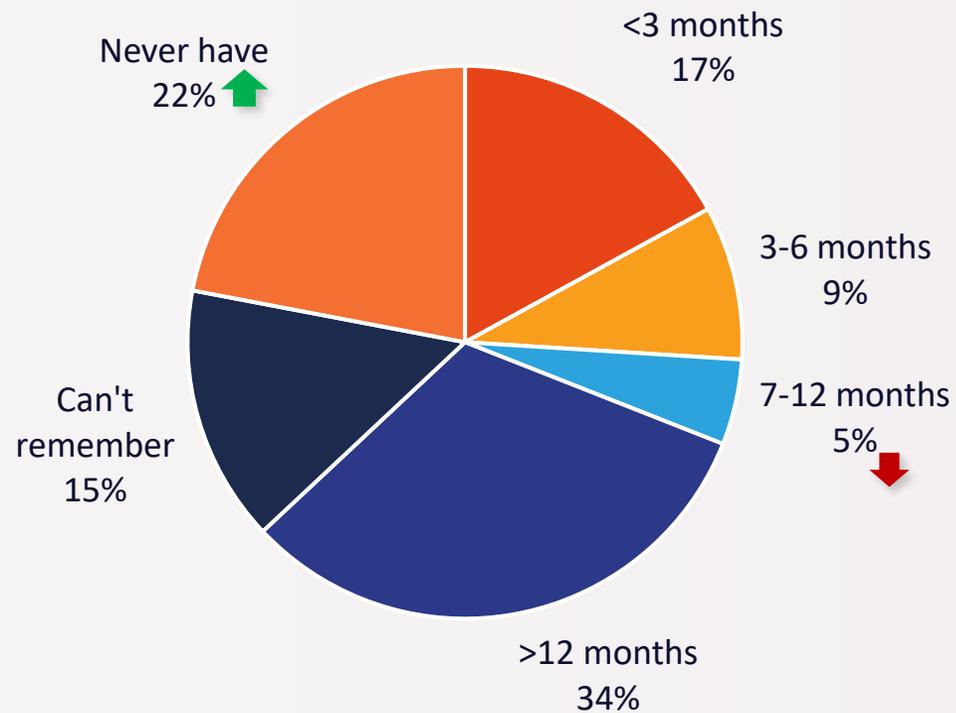
Tap water preference

Prefer to drink tap water

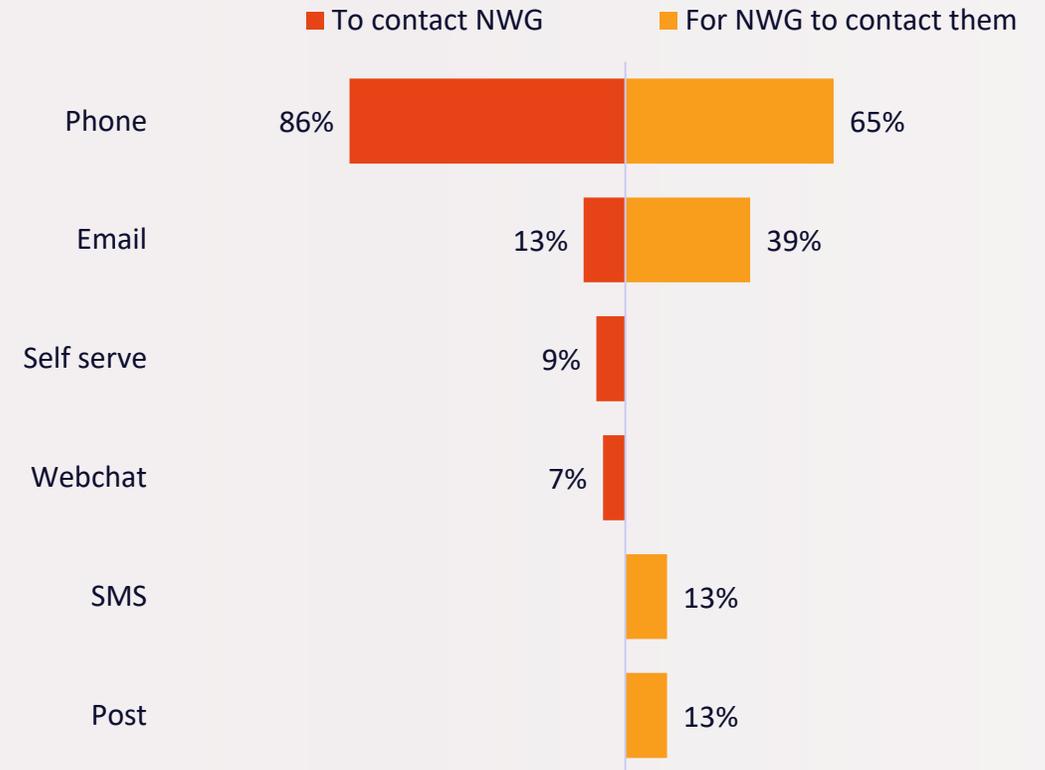


Contact

When last had contact with NWG



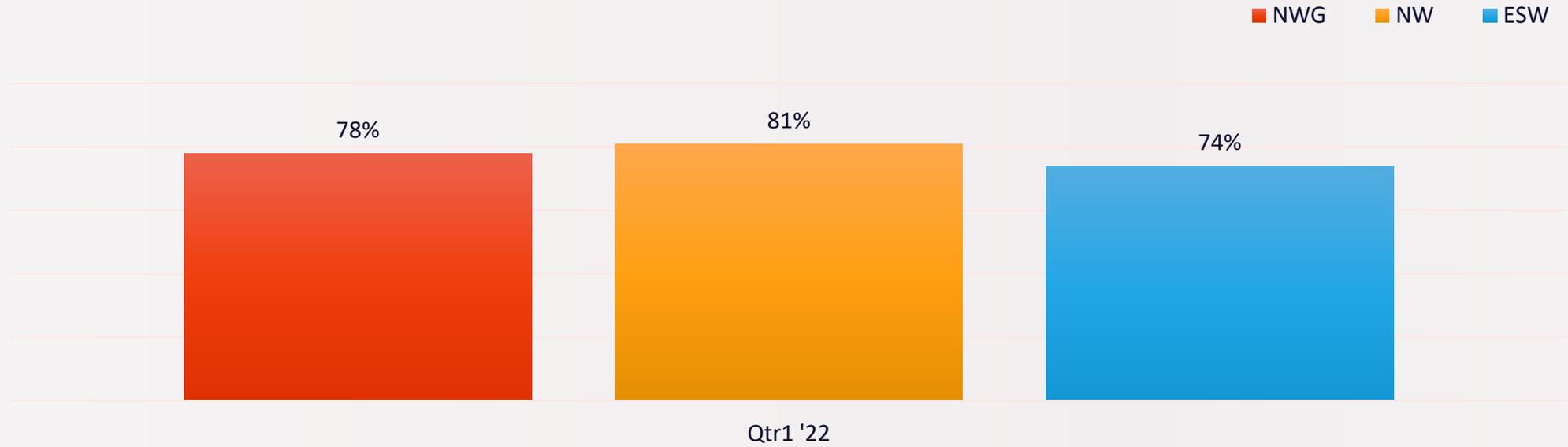
Preferred contact methods



↑ ↓ Significantly higher/Lower than previous Qtr

Q9. When did you last have any contact with [Northumbrian Water/Essex & Suffolk Water], apart from receiving a bill? **Q10** If you needed to contact [Northumbrian Water/Essex & Suffolk Water], which method would you tend to use, to get in touch with them? **Q11** And if [Northumbrian Water/Essex & Suffolk Water] had a reason to contact you, which method would you prefer them to use? Base NWG (500)

Whether issue was resolved





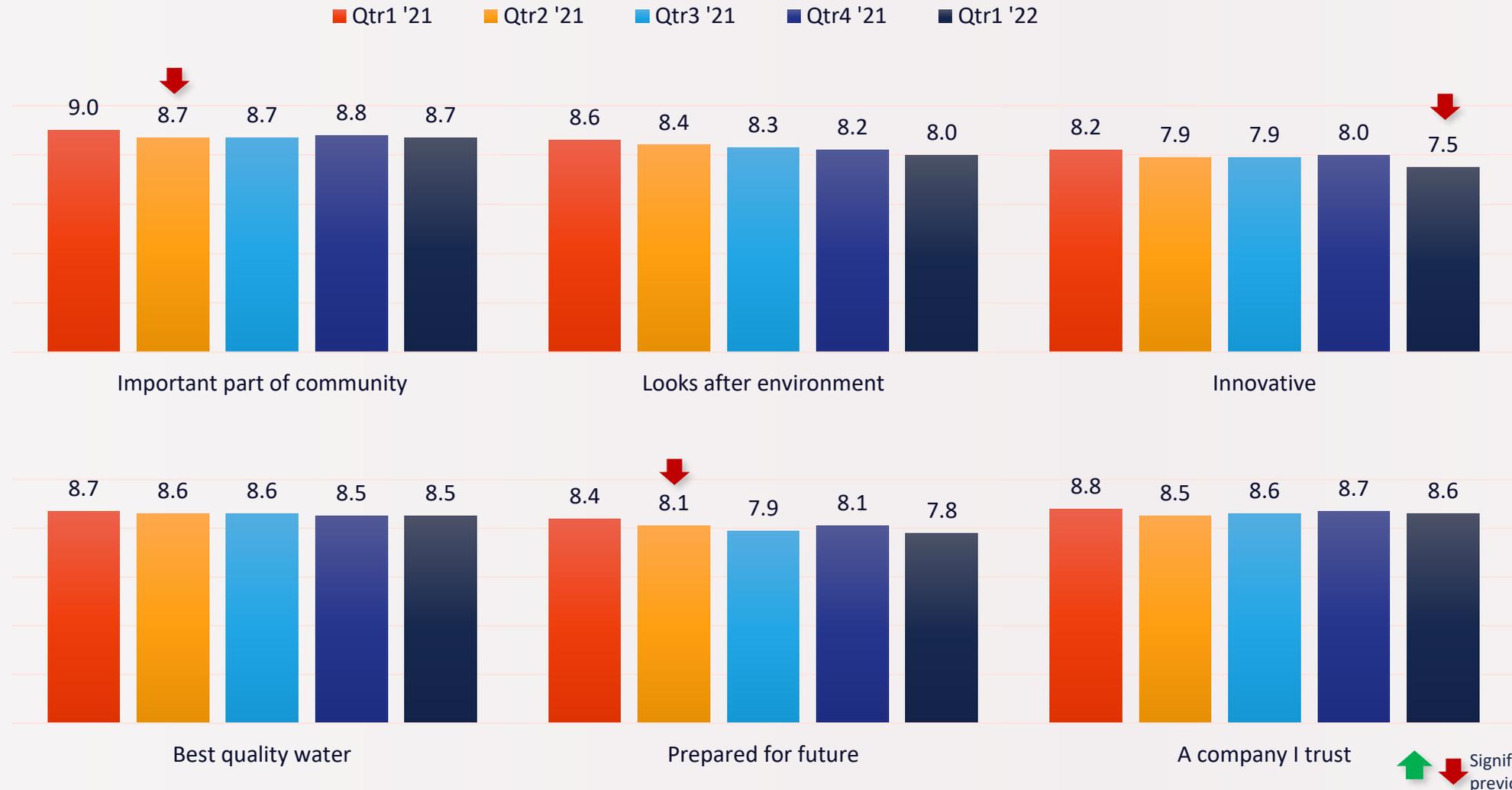
Brand values



NWVG
living water

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

Brand values (NWG)



Q12 Thinking now about your overall impressions of [Northumbrian Water/Essex & Suffolk Water], to what extent would you agree or disagree with the following statements? Please use a scale of 0 to 10, this time where 0 is strongly disagree and 10 is strongly agree. Base NWG (500)

Brand values (by region)

Important part of community	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	9.1	8.9	8.8	9.0	8.8
ESW	8.9	8.4 ↓	8.5	8.6	8.5
Looks after environment	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.7	8.6	8.5	8.3	8.2
ESW	8.4	7.9	7.8	8.1	7.6
Innovative	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.5	8.2 ↓	8.1	7.9	7.7
ESW	7.6	7.5	7.6	8.0	7.3 ↓


 Significantly higher/Lower than previous Qtr

Q12 Thinking now about your overall impressions of [Northumbrian Water/Essex & Suffolk Water], to what extent would you agree or disagree with the following statements? Please use a scale of 0 to 10, this time where 0 is strongly disagree and 10 is strongly agree. Base NWG (500), NW (318), ESW (182)

Brand values (by region)

Best quality water	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.9	8.9	8.8	8.7	8.7
ESW	8.2	7.9	8.3	8.2	8.3
Prepared for future	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	8.6	8.4	8.1	8.2	8.0
ESW	8.1	7.6	7.6	7.9	7.5
A company I trust	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
NW	9.0	8.8	8.7	8.8	8.8
ESW	8.3	8.0	8.4	8.6	8.3

  Significantly higher/Lower than previous Qtr

Q12 Thinking now about your overall impressions of [Northumbrian Water/Essex & Suffolk Water], to what extent would you agree or disagree with the following statements? Please use a scale of 0 to 10, this time where 0 is strongly disagree and 10 is strongly agree. Base NWG (500), NW (318), ESW (182)

Comments relating to trust score

All respondents - 500 customers

- Never had any problems – 32%
- Reliable water supply – 14%
- No reason not to trust them – 12%
- Good customer service – 10%
- Good quality water – 10%
- Reliable/trustworthy – 9%
- Never heard anything bad about them – 8%
- Happy with them – 7%
- Quick response/resolution – 7%
- Deal with issues/problems – 6%
- Been with them a long time – 5%
- Good communication – 5%
- Notify customers of any work – 4%

- Do not know enough about them – 7%
- No other option/monopoly – 7%

Never had an issue with them. They say what they are going to do, and they do it. We thought we had a leak going to the house and they investigated and discovered the problem was somewhere else and resolved quickly
Trust score 7-10

I've had no reason not to trust them. I've had no issues with the service I obtain
Trust score 7-10

Because there's been a few things I've had to question, bills and payments. Basically, I was getting overcharged, and my wife sorted it. It was resolved in a way; we were being overcharged for certain things so as far as I am aware that money came back off
Trust Score 0-6

I feel like they are very clear on charges and what they do. They don't harass you unlike some of the other utilities to add things on. They seem to do what they do really well. The service is almost invisible. If there is a problem, they tell you. They are no bother at all. They do what you want them to do
Trust score 7-10

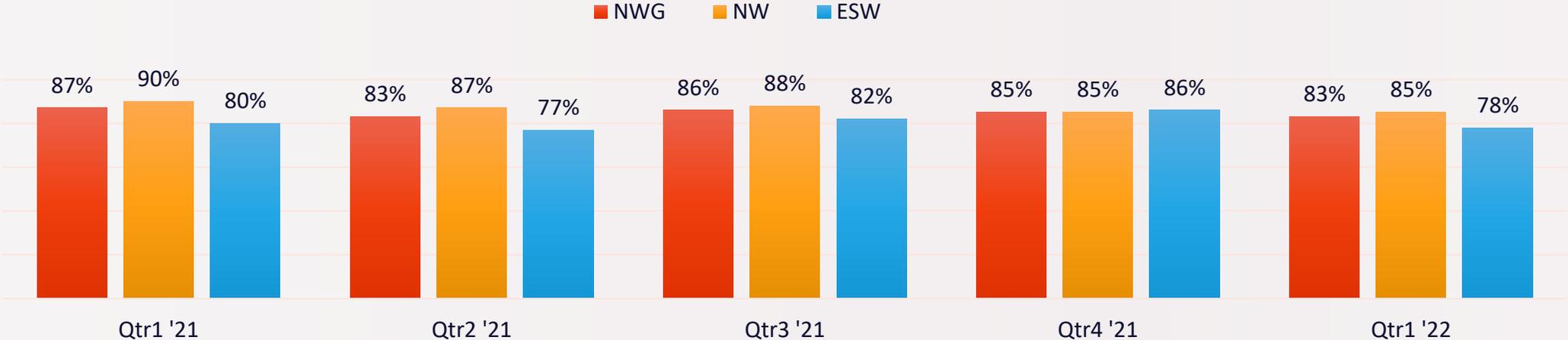
Because you can't get to talk to them. Simply, they're just so hard to contact.
Trust Score 0-6



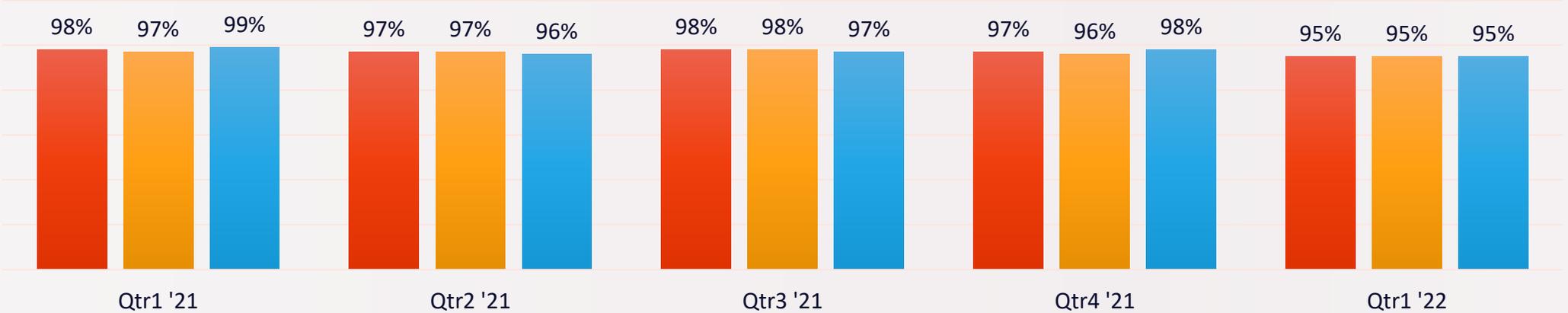
Information and services

Information and service access

Received all information wanted, to feel informed



Services easy to access



Q8: Has [Northumbrian Water/Essex & Suffolk Water] supplied you with all the information you want, to feel informed about water [NW: and sewerage] services in your area? Q14: Would you say that the services provided by [Northumbrian Water/Essex & Suffolk Water] are easy to access? Base NWG (500) NW (318) ESW (182)

21 customers think that services are not easy to access. Some examples:

Updates very poor and communication - days before there were any updates with them. It takes a while to fix, but doesn't take long to say there's a problem, but no communication. I don't know if they use Twitter, but I don't use social media.

Hard to get in touch with by phone. You get passed around, sometimes you get cut off if you do get through and don't get calls back when they say they will and they don't respond to emails.

You've got to phone the number then you get the automated service and after a while it gets on your nerves.

The only way you can is online and it's complicated and stressful. It's hard to find a contact number and when you do it's hard to get in contact with someone.

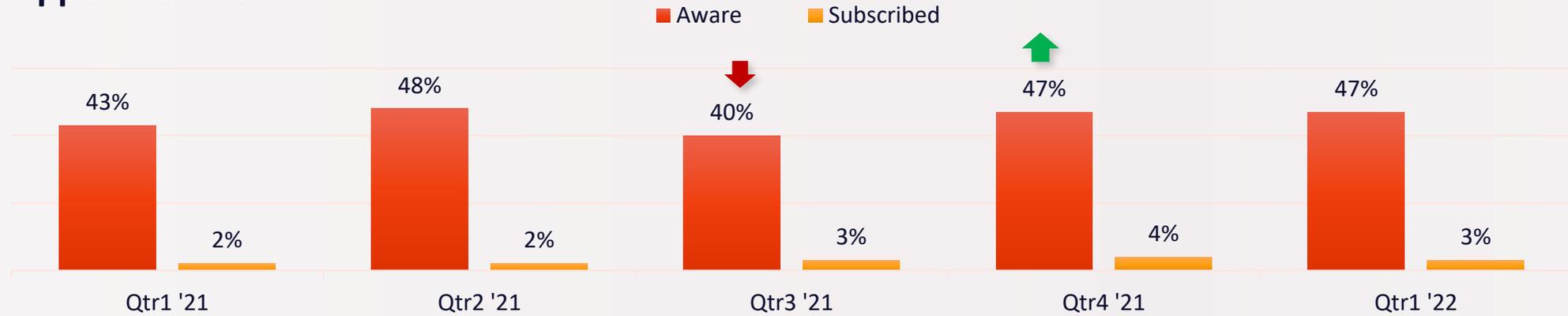
It's difficult because of phone waiting times and the lack of freephone numbers.



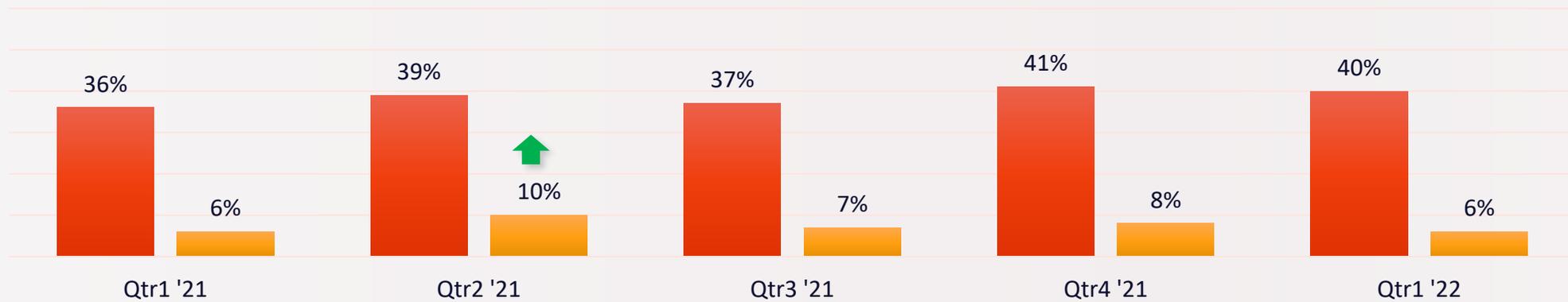
Priority services

Priority services (NWG)

Additional support services



Additional financial support



Significantly higher/Lower than previous Qtr

Priority services (by region)

NW	Additional support services		Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
	Aware		45%	49%	39% ↓	47%	47%
	Subscribed		3%	2%	4% ↑	3%	2%
	Additional financial support		Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
	Aware		35%	39%	36%	41%	39%
Subscribed		5%	10%	7%	7%	6%	

ESW	Additional support services		Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
	Aware		40%	46%	41%	47%	48%
	Subscribed		2%	3%	1%	5% ↑	4%
	Additional financial support		Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22
	Aware		39%	39%	39%	42%	42%
Subscribed		9%	9%	7%	10%	7%	



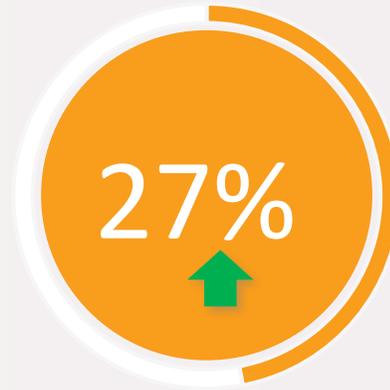
 Significantly higher/Lower than previous Qtr

Key headlines



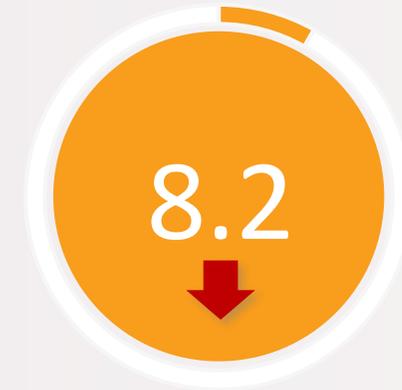
NPS this Quarter

After a significant increase in Q4'21 to 50.9, NPS for NWG has dropped to levels similar to the rest of 2021. ESW has seen its NPS score drop significantly this quarter



Good quality water

When asked what the company does well at, there has been a significant increase in those responding with 'good quality water' from Q4'21.



ESW Customer Service

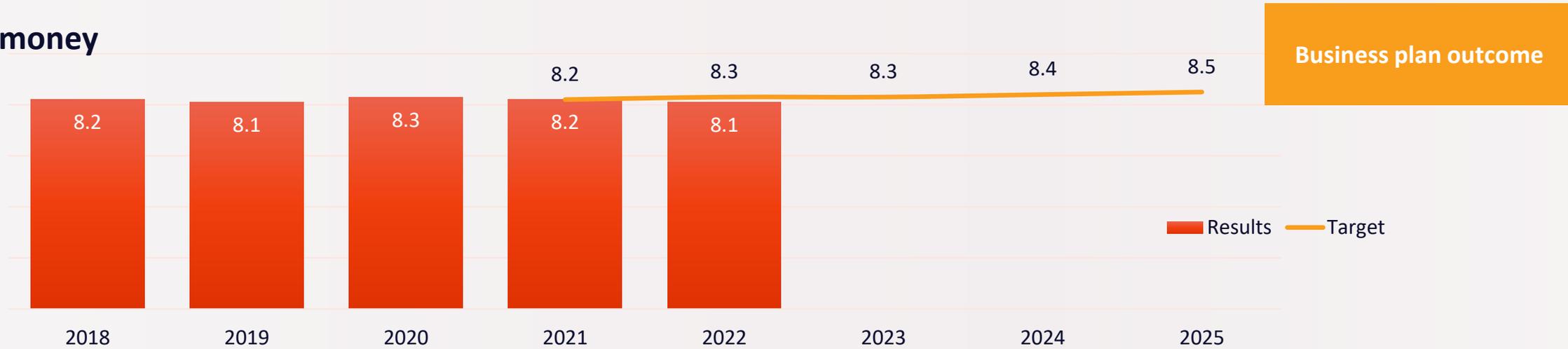
Satisfaction of ESW customer service has significantly decrease from the end of 2021



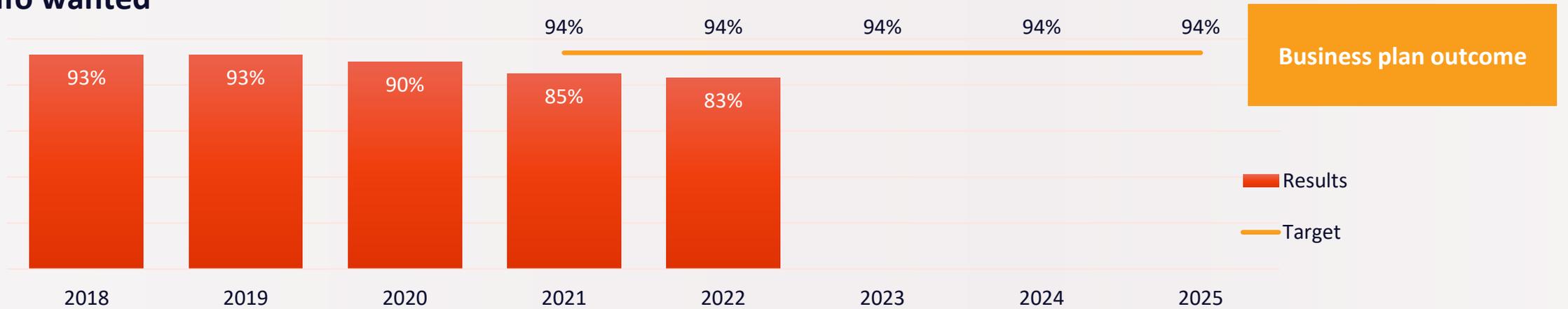
Progress and targets

Progress towards targets, 1

Value for money

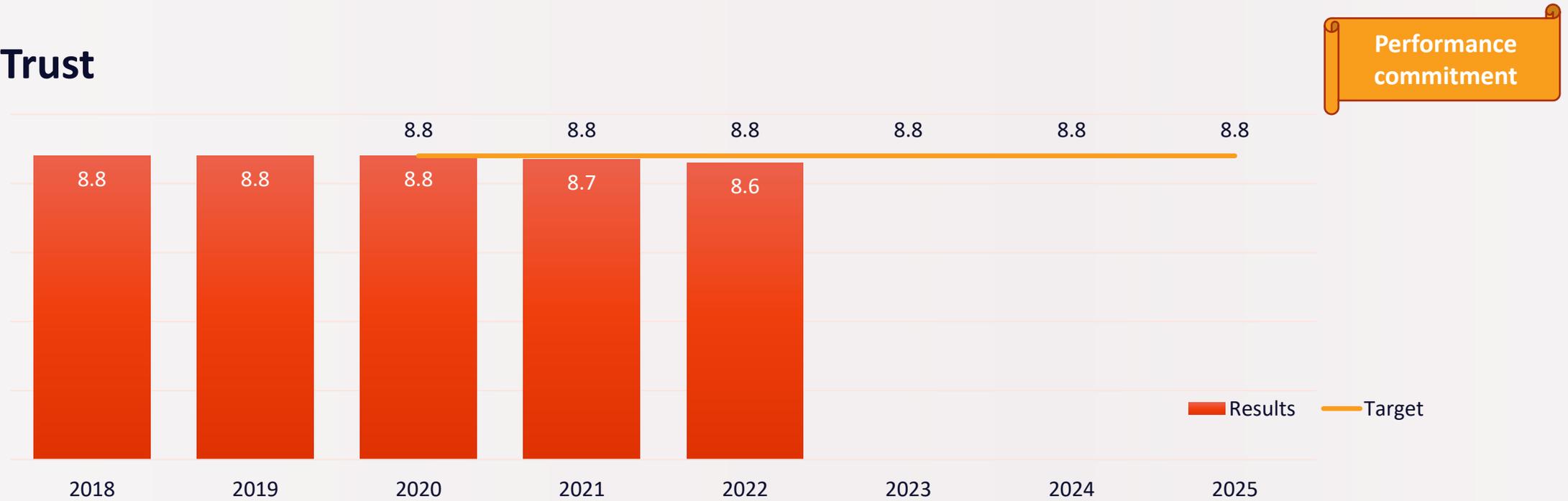


Rec'd all info wanted



Progress towards targets, 2

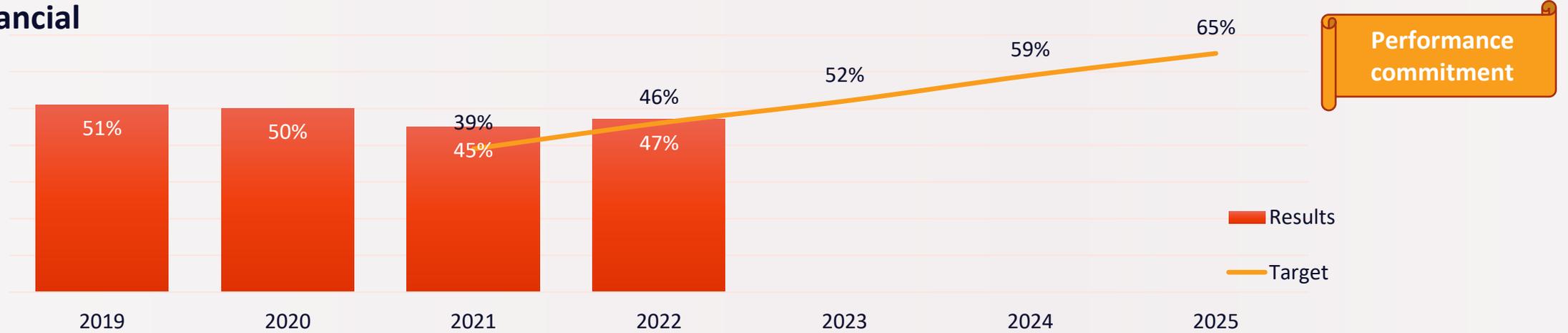
Trust



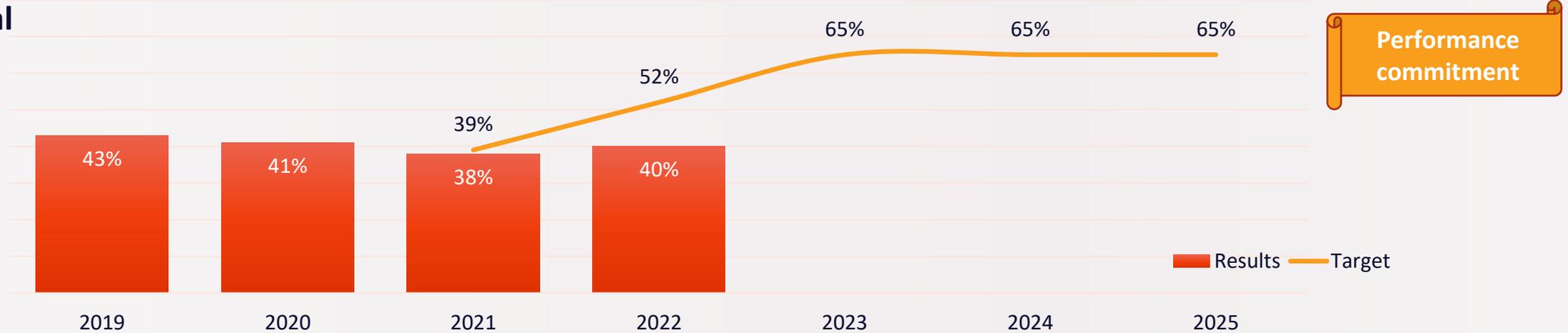
Progress towards targets, 3

Awareness of additional support

Non-financial



Financial

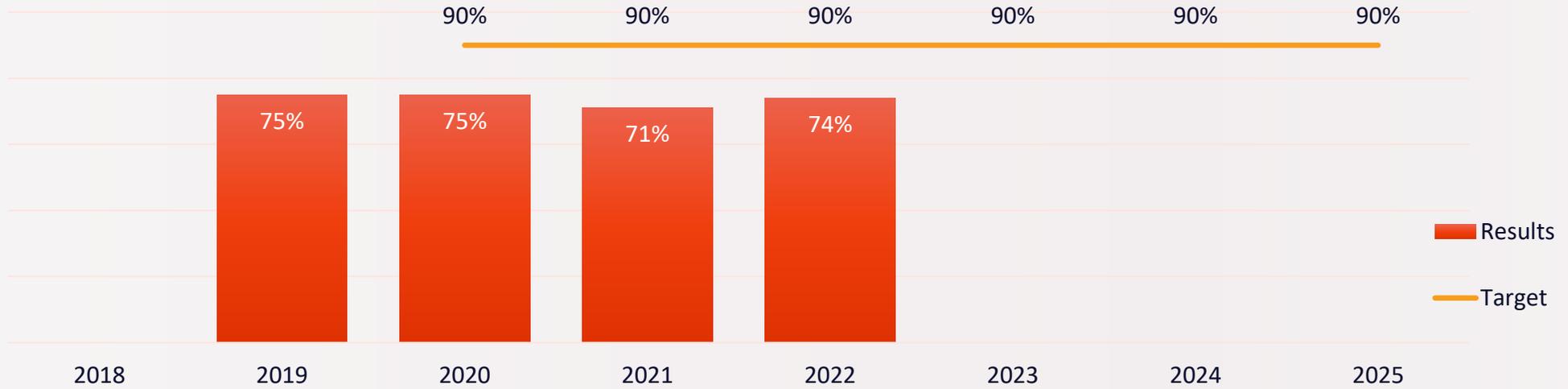


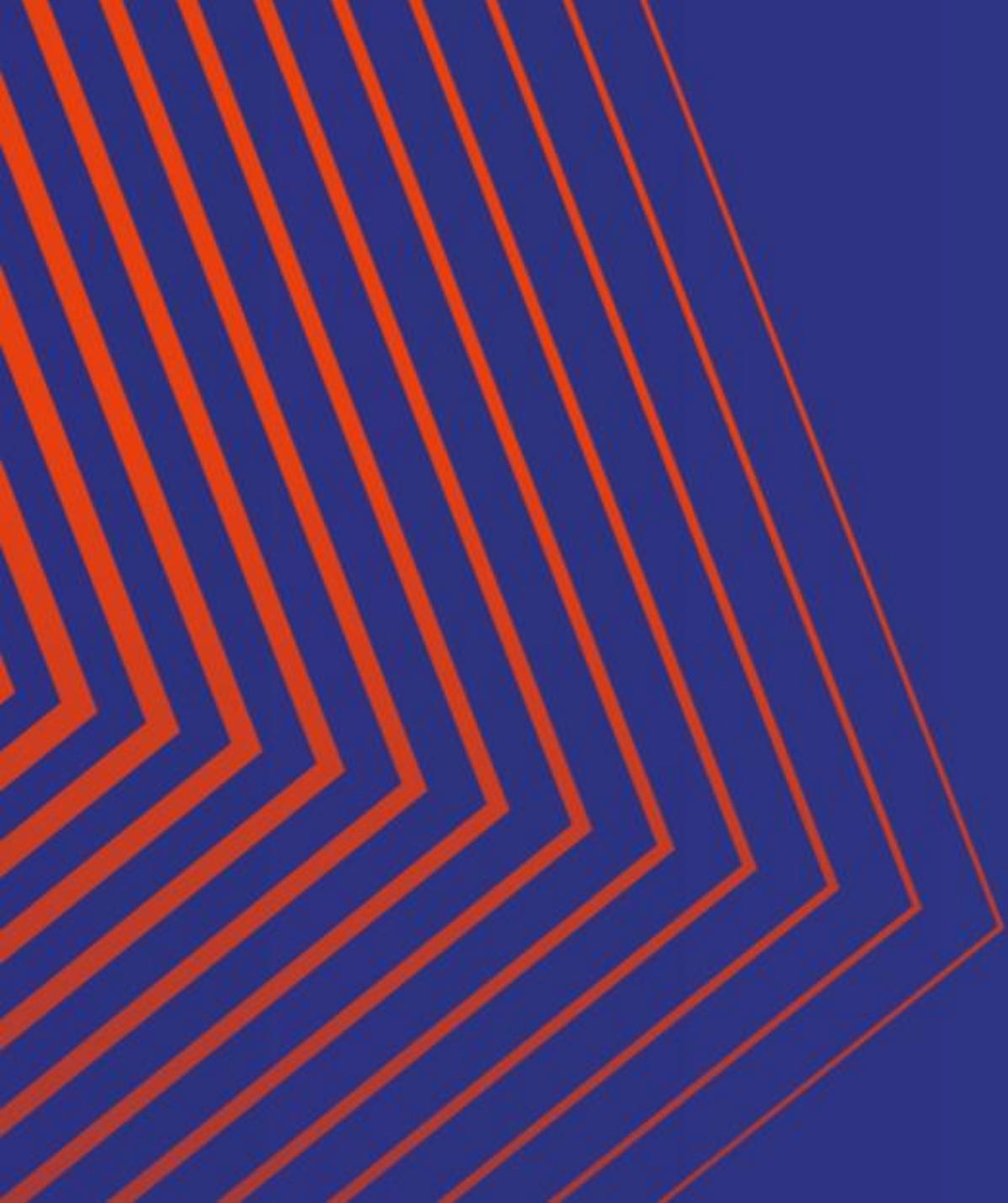
Progress towards targets, 4

Would choose tap water over bottled

(excluding don't know/no pref)

Ambitious goal





TRINITY
MCQUEEN