



06 / 07 / 20

Domestic Tracker Results: Quarter 2 2020

Our ref. J3065.1



DEFINING THE **CLEAREST** DIRECTION

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Domestic Tracker

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

Covering:

- 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

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Approach

- Carried out by phone
500 interviews per quarter
Sample provided by NWG
and TPS-screened before
use
- Quotas set to achieve:
- 300 NW, 200 ESW
 - Gender and age to
match the population

Qtr2 2020

Fieldwork carried out:
11 - 29 May 2020

This is the first wave of the
tracker carried out by Allto.
We have taken and combined
all previous data, and the
latest results have been
tested for statistical
significance vs earlier waves.



Significance testing

For each question, differences between the results obtained on the latest survey wave and previous waves have been tested for statistical significance, at the 95% level.

If a result this quarter is significantly different to any previous quarter, then the **significantly higher** result is shown in this report circled in green, and the result it is significantly **higher than** is shown circled in red.

Where differences are circled in this way, that indicates what is likely to be a real change in perceptions. Where they are not circled, even if they look fairly large, we cannot be confident that the differences are down to anything other than sampling effects.

Note that a result can be significantly different to more than one other result, so there can be more than one red or green on a line.

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NPS since this quarter last year



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Top reasons for NPS scores this wave

Promoters (scores of 9-10) - 292 customers

- No problems (46%)
- No supply problems (12%)
- Quick response/resolution (11%)
- Good value/fair price (11%)
- Good customer service (10%)
- Good communication/updates (8%)
- Helpful (8%)
- Timely/accurate billing (5%)
- Good company/do a good job (5%)
- Good water quality (5%)
- Been with them for years (4%)
- Polite/friendly staff (3%)
- Resolve problems (3%)
- Easy to contact/answer quickly (2%)
- Efficient (2%)
- Understanding/sympathetic (2%)

Passives (scores of 7-8) – 126 customers

- No problems (37%)
- No supply problems (10%)
- Good customer service (6%)
- Always room for improvement (6%)
- Helpful (5%)
- OK/fine (5%)
- Good communication (4%)
- Billing systems needs improvement (4%)
- Good/fair price (3%)
- Expensive (3%)
- Nothing to compare against/no choice/had no real dealings with them (16%)

Detractors (scores of 0-6) – 62 customers

- Expensive (13%)
- No problems (10%)
- Poor water quality (8%)
- Had poor experience with them (6%)
- Always room for improvement (5%)
- Don't recommend anyone/no-one to recommend to (5%)
- Nothing to compare against/no choice/had no real dealings with them (42%)



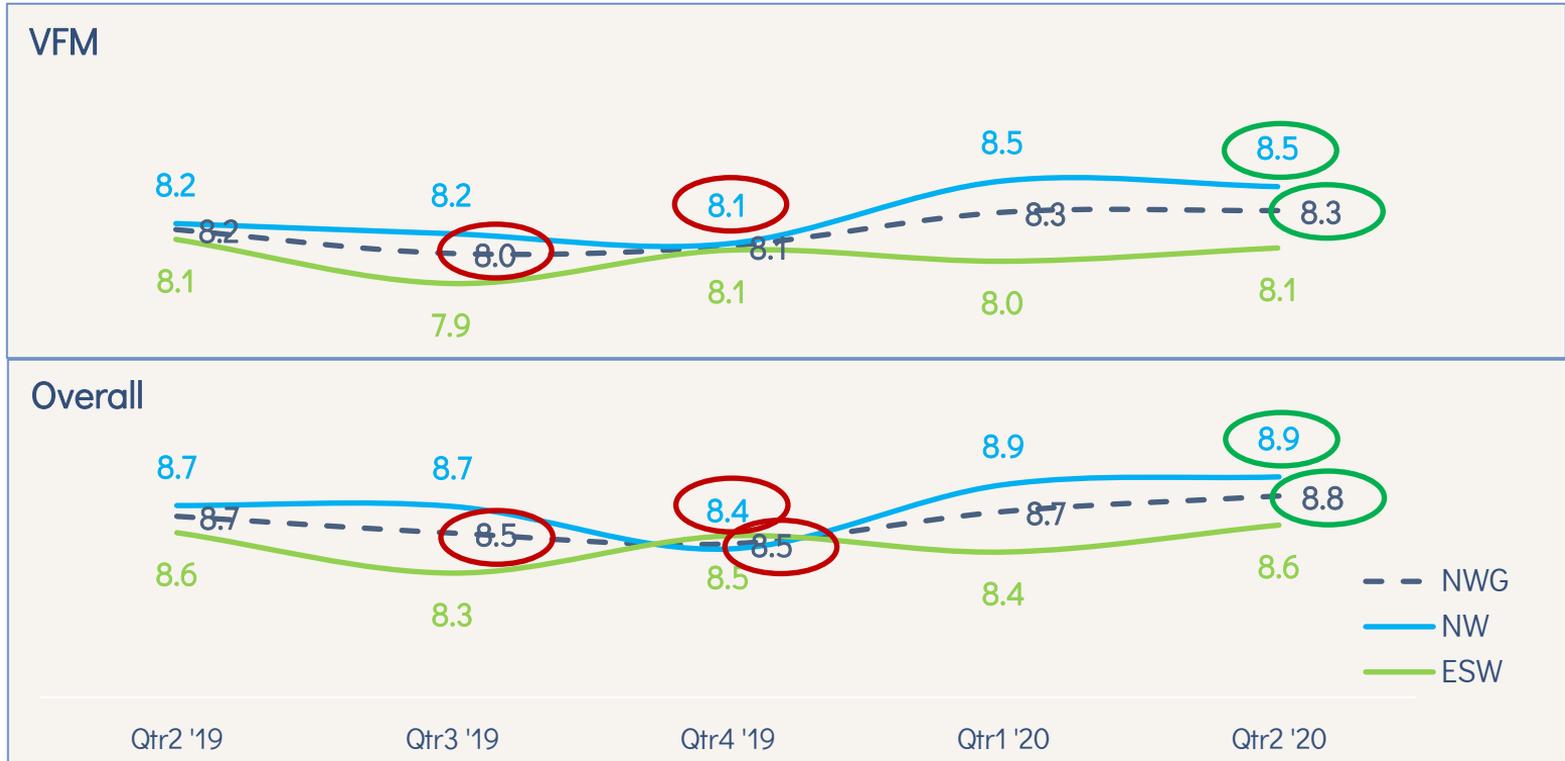
Top improvements to give a higher score

Non-Promoters (scores of 0-8) - 188 customers

- Lower prices (30%)
- Better quality water (7%)
- Better billing system/fewer estimated bills (5%)
- Water and waste water from the same company (ESW 5%)
- Better communication/return calls (4%)
- Improve customer service (3%)
- Repair leaks quicker (3%)
- Better sewer/pipes maintenance (3%)
- Better water pressure (2%)

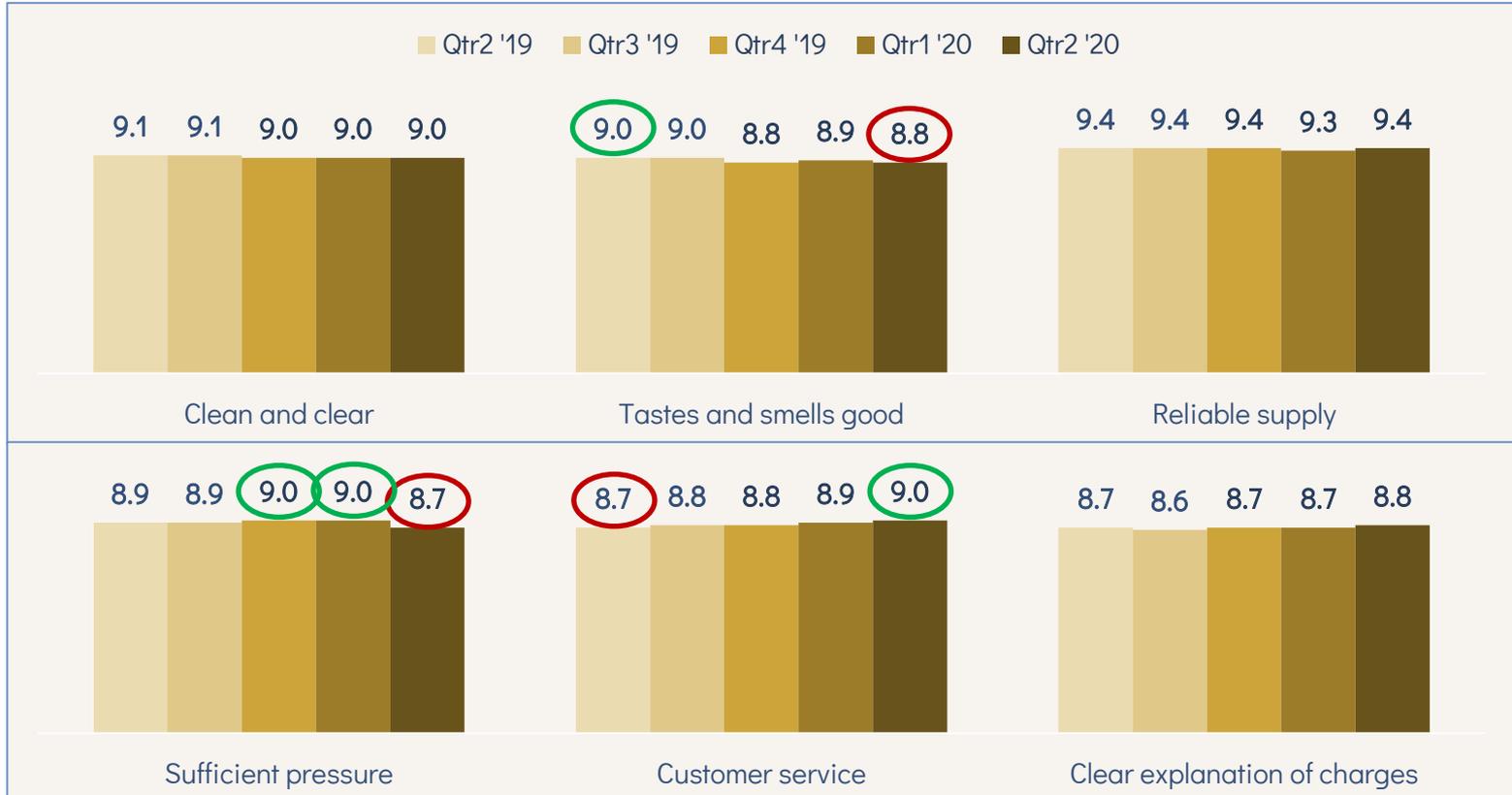


Overall satisfaction and with Value for Money, since this quarter last year



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Service satisfaction 1 (NWG)



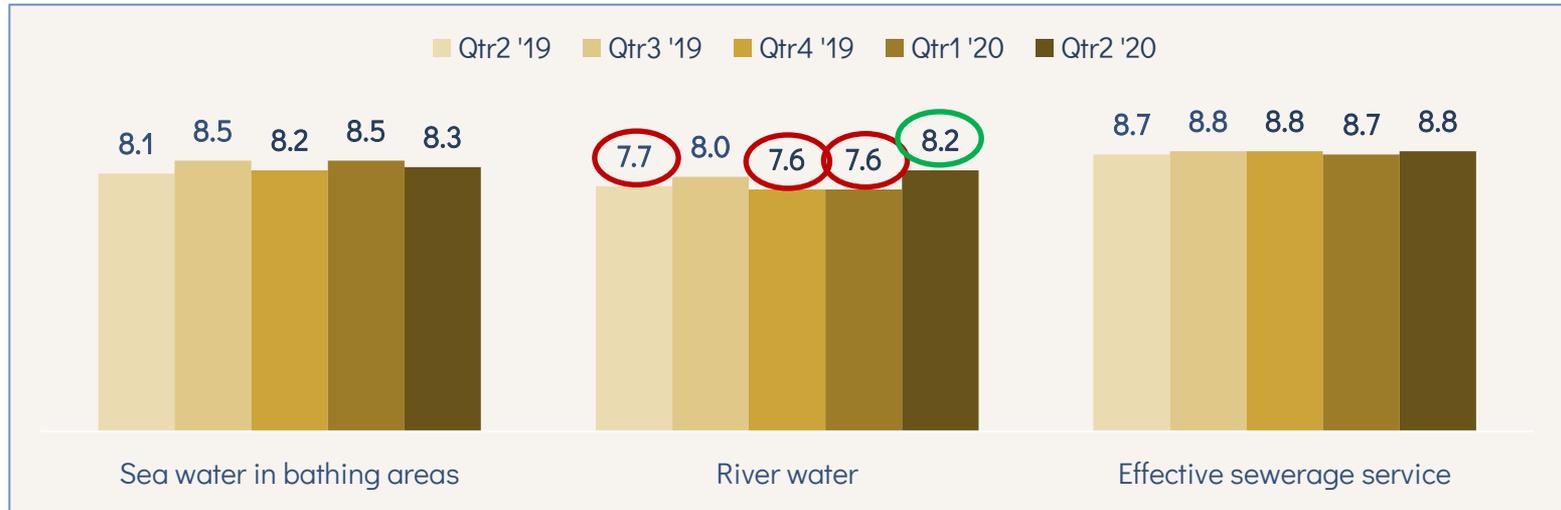
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Service satisfaction 1 (by region)

Clean and clear	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	9.2	9.2	9.0	9.2	9.2
ESW	9.1	8.9	9.0	8.8	8.7
Tastes and smells good	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	9.0	9.1	8.8	9.1	9.0
ESW	9.0	8.8	8.8	8.6	8.5
Reliable supply	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	9.4	9.4	9.4	9.4	9.5
ESW	9.4	9.3	9.4	9.2	9.3
Sufficient pressure	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	9.0	9.0	9.1	9.2	8.9
ESW	8.9	8.8	8.8	8.7	8.5
Customer service	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	8.8	8.9	8.7	9.0	9.1
ESW	8.6	8.6	9.0	8.7	8.8
Clear explanation of charges	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	8.7	8.7	8.7	8.8	8.8
ESW	8.6	8.6	8.7	8.6	8.7



Service satisfaction 2 (NW)





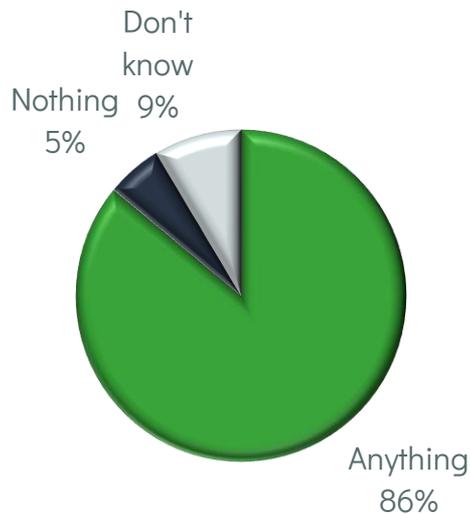
Top improvements required on service issues

Gave any low scores (0-6) - 143 customers

- Improve quality/taste of water (30%)
- Improve water pressure (22%)
- Better sewer/pipes maintenance (8%)
- Lower prices (8%)
- Cleaner rivers/beaches (7%)
- More accurate bills (5%)
- More information on their services (3%)
- More knowledgeable/empowered staff (2%)
- Improve customer service (2%)

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What the company does well



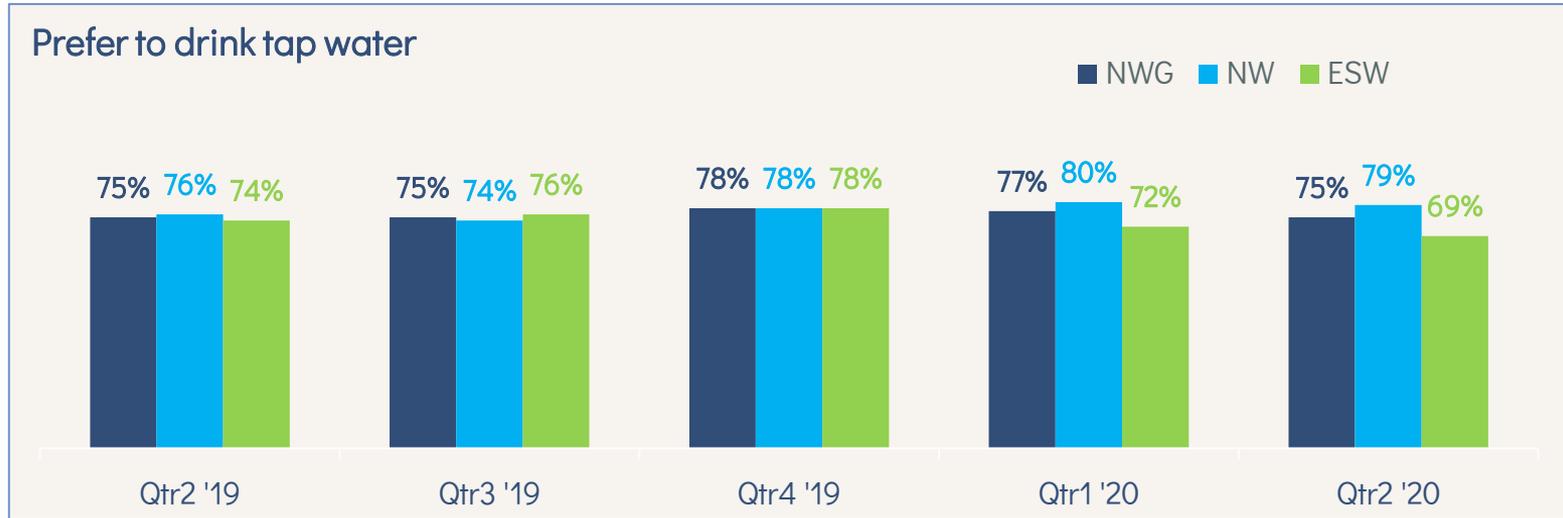
All respondents - 500 customers

- Reliable supply (30%)
- Good quality/tasting water (16%)
- Good service overall/never need to contact them (15%)
- Good customer service (13%)
- Good communication (11%)
- Quick to resolve problems/leaks (9%)
- Timely/accurate/clear bills (5%)
- Good/fair price (3%)
- Easy to contact (2%)
- Sewer/pipe maintenance (2%)
- Good water pressure (2%)



Tap water preference

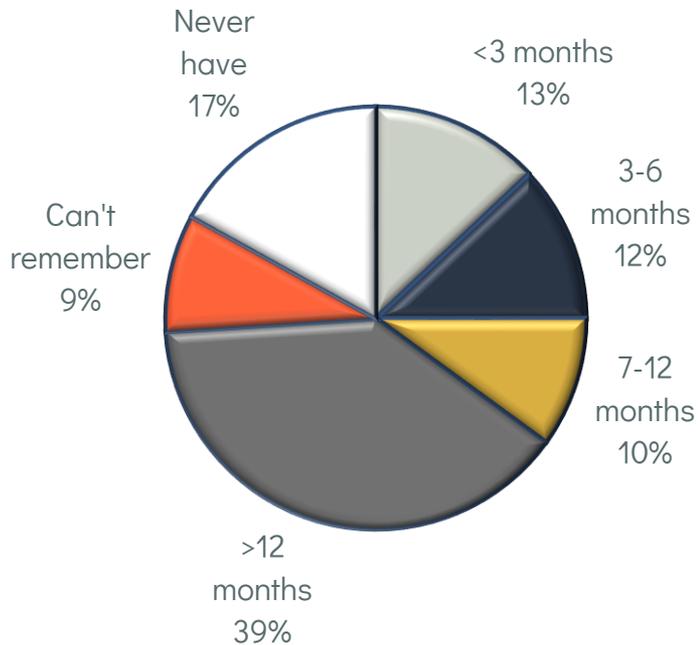
Note: results are re-based to exclude any respondents who do not express a preference



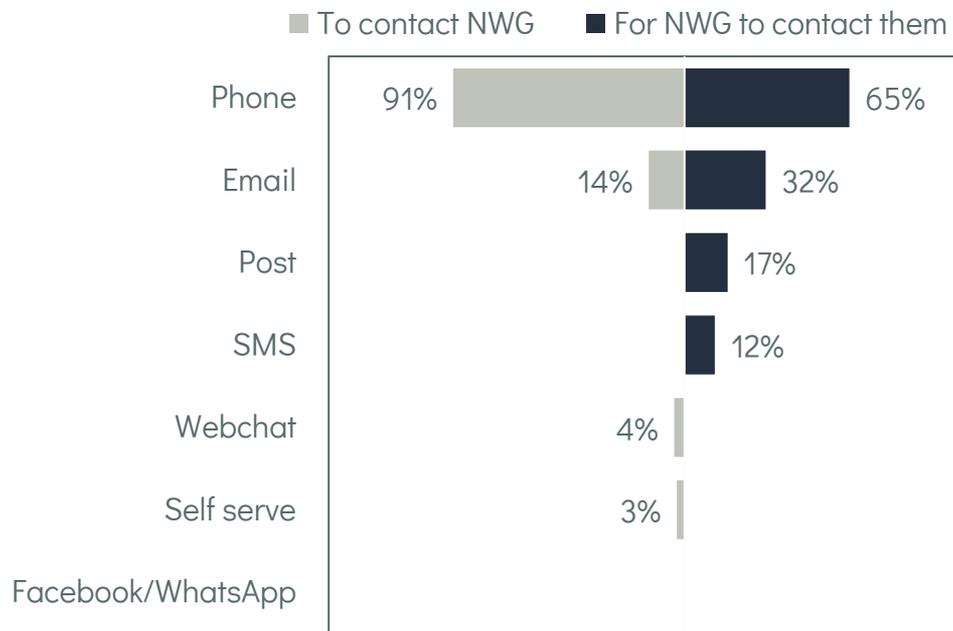


Contact

When last had contact with NWG

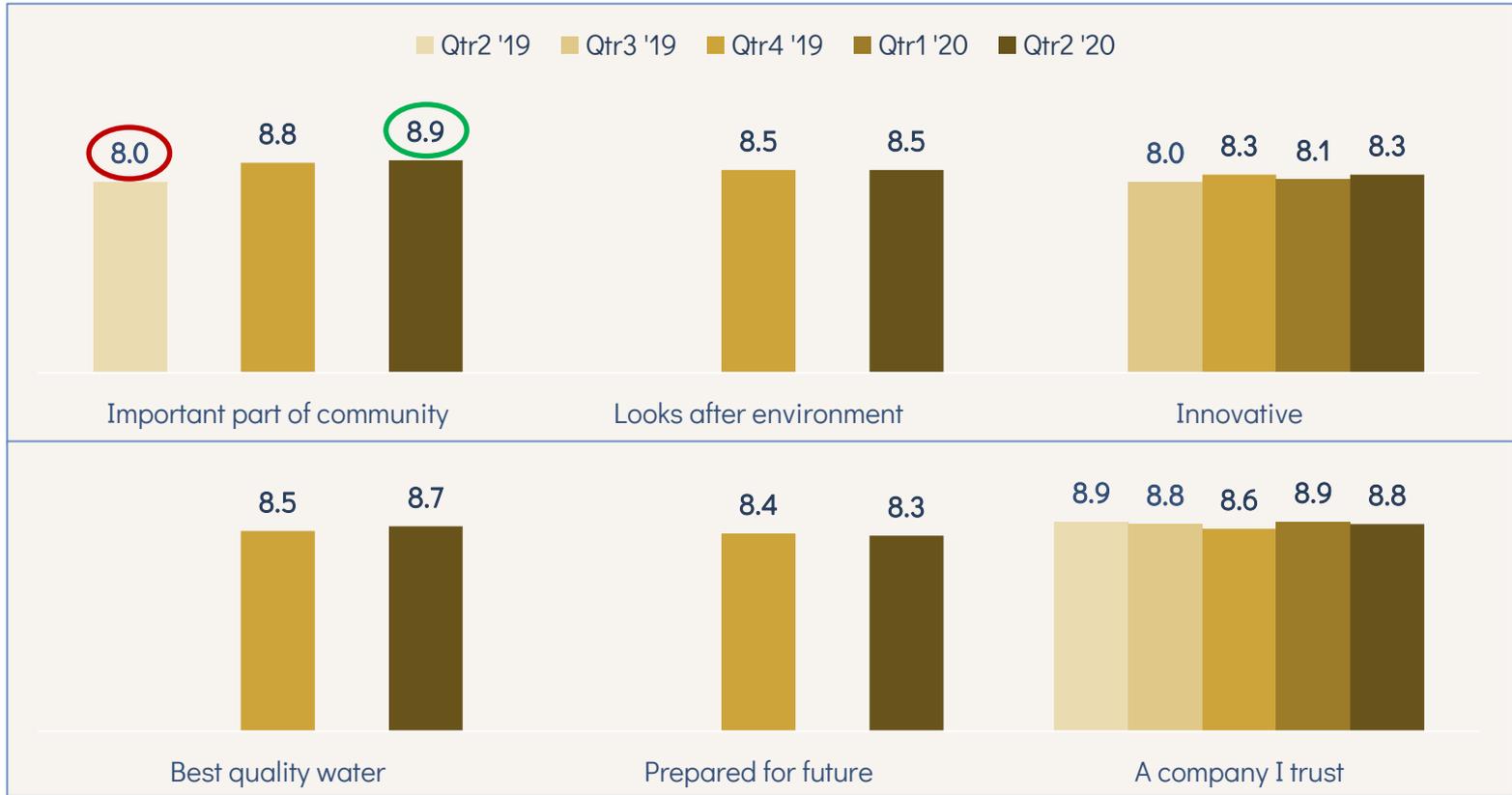


Preferred contact methods



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Brand values (NWG)



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Brand values (by region)

Important part of community	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	8.1		8.9		9.1
ESW	7.9		8.6		8.7
Looks after environment	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW			8.6		8.7
ESW			8.3		8.3
Innovative	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW		8.2	8.4	8.3	8.5
ESW		7.6	8.1	7.7	8.0
Best quality water	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW			8.6		8.9
ESW			8.4		8.4
Prepared for future	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW			8.5		8.4
ESW			8.3		8.1
A company I trust	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
NW	8.9	8.9	8.6	9.0	9.0
ESW	8.8	8.6	8.7	8.6	8.6

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Comments relating to trust score

All respondents - 500 customers

- Never had any problems – 21%
- Reliable water supply – 14%
- No reason not to – 12%
- Deal with issues/problems – 11%
- Good communication – 10%
- Good customer service – 8%
- Been with them a long time – 5%
- Good reputation/don't hear anything bad – 5%
- Previous good experience – 4%
- Good billing system – 4%
- Easy to contact – 3%
- Good/fair price – 2%
- Look after the environment – 2%
- Local/British company – 2%

It's a big company, local, and in existence for a long time. Experience, you can trust the history

As far as I'm concerned I'm just getting water, there's nothing attached to it, a lot of other companies do other things when they provide a service

Every time we turn the tap on the water is there and if there's going to be a problem they let me know

They have given a woolly response as to why they can't reduce the bills

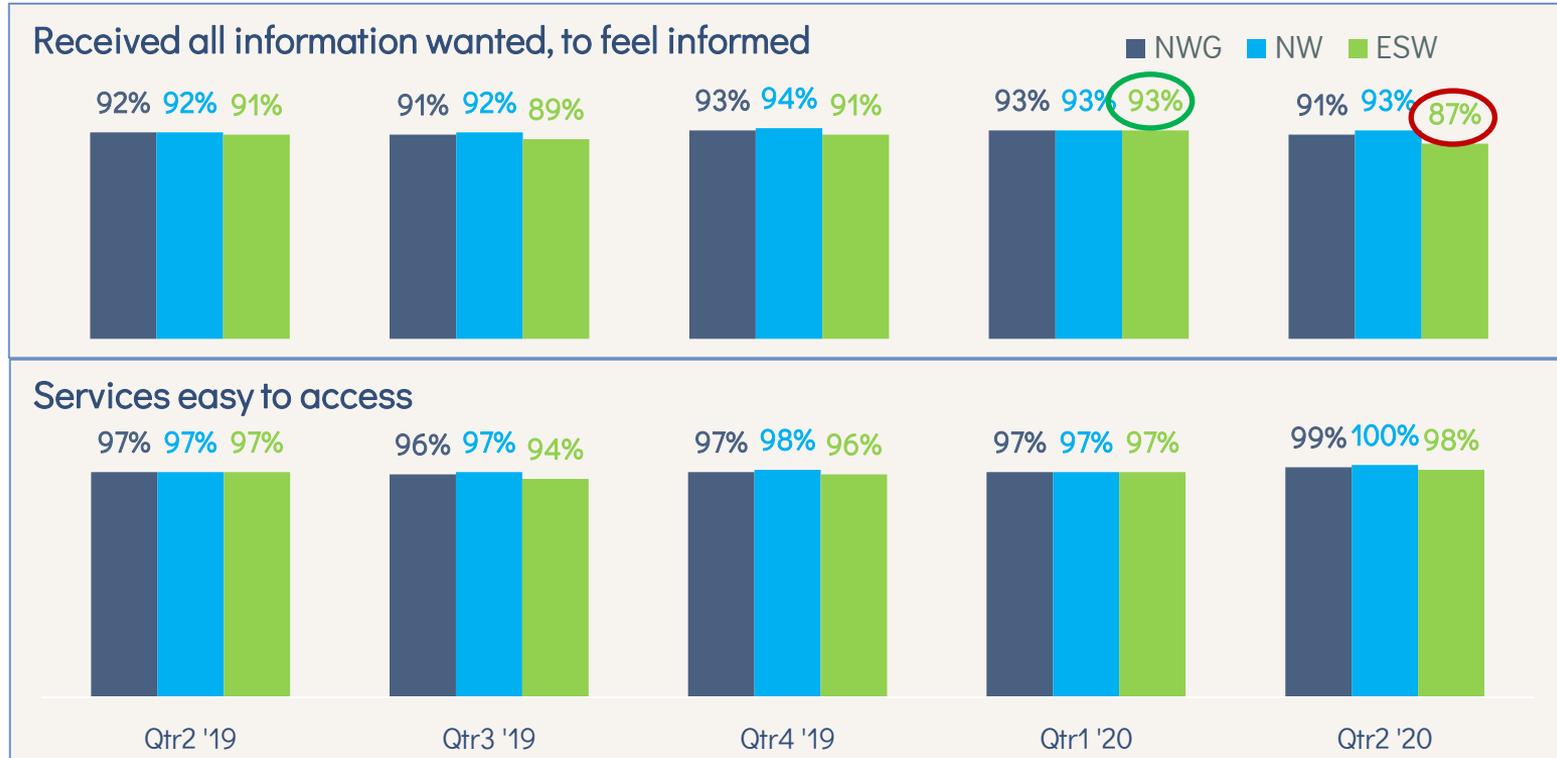
You never quite know what's going on and what's going into things, so I'm very sceptical with anything these days. I don't know enough about them to know whether to trust them or not

I have had a reliable service from them for a very long time and when I contact them they've been reasonable and human; there are people on the front line who aren't automatons and listen to what customers are saying and react appropriately and that's part of the trust I guess



Note: results are re-based to exclude any respondents who do not have an opinion

Information and service access



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4 customers think that services are not easy to access. They explain:

I mean for example, I'm going back to the quality of water and the stopcock issues I've had with them, it almost felt like I was having to push my thoughts on them, of what it should be. I don't feel as though it was easy for me as a customer for getting these problems sorted and it was all my efforts and them not taking the responsibility of it of the people I'm paying the bill to and all that.

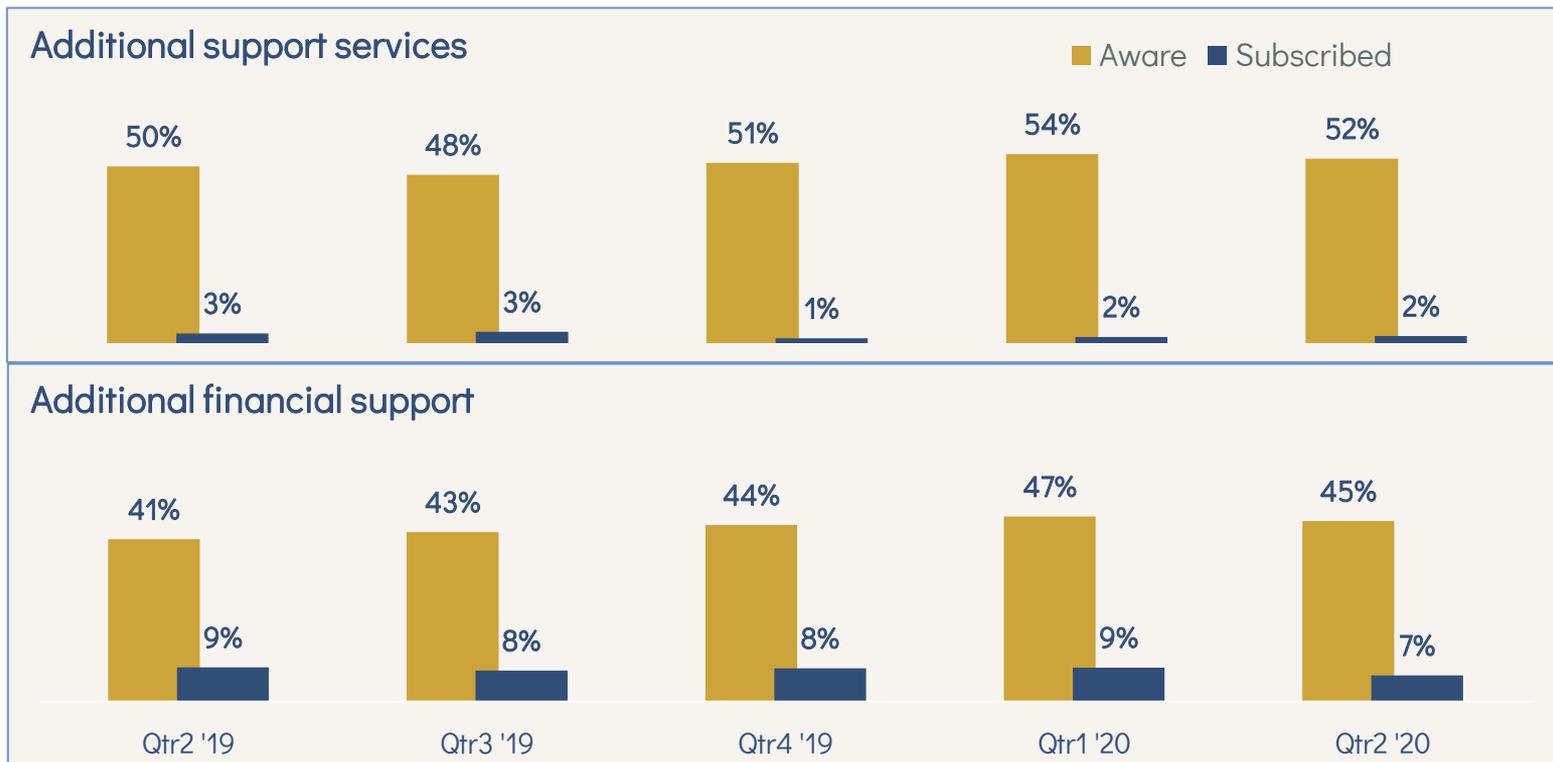
Not as easy as the other companies

The only reason is what I wanted from the company was to register in 2014. When I tried to call them there was music playing all the time for 30 minutes before I got through to the operative

You're passed from pillar to post, when you hold the line they come back on and say hold the line again. The only number I have is the number on the bill when it comes through, when I have problems the family sort all my bills and everything out for me

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Priority services (NWG)



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Priority services (by region)

NW	Additional support services	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
	Aware	52%	50%	55%	56%	53%
	Subscribed	2%	3%	1%	1%	2%
	Additional financial support	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
	Aware	42%	40%	46%	51%	45%
	Subscribed	10%	7%	9%	10%	6%

ESW	Additional support services	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
	Aware	48%	45%	46%	51%	52%
	Subscribed	4%	4%	3%	3%	2%
	Additional financial support	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20
	Aware	39%	46%	43%	39%	47%
	Subscribed	7%	9%	7%	7%	8%

HEADLINES

NPS this quarter – 47.9. Overall satisfaction 8.8 and satisfaction with value for money 8.3

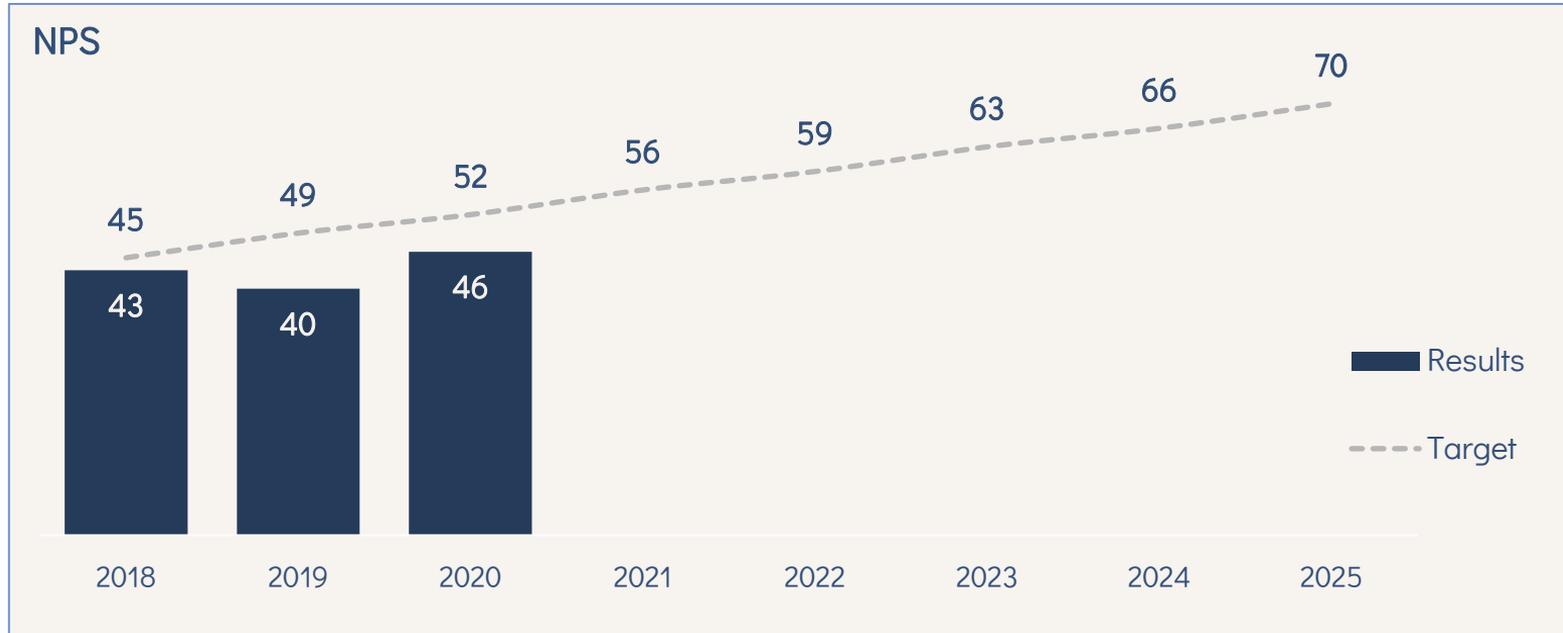
All of these key measures are significantly higher than they were in the second half of last year. Also higher than this time last year, albeit only indicatively and not statistically significantly

Water quality measures have dropped in ESW since this time last year. In NW, perceptions of river water have improved

Being seen as an important part of the community is higher than this time last year, in both NW and ESW

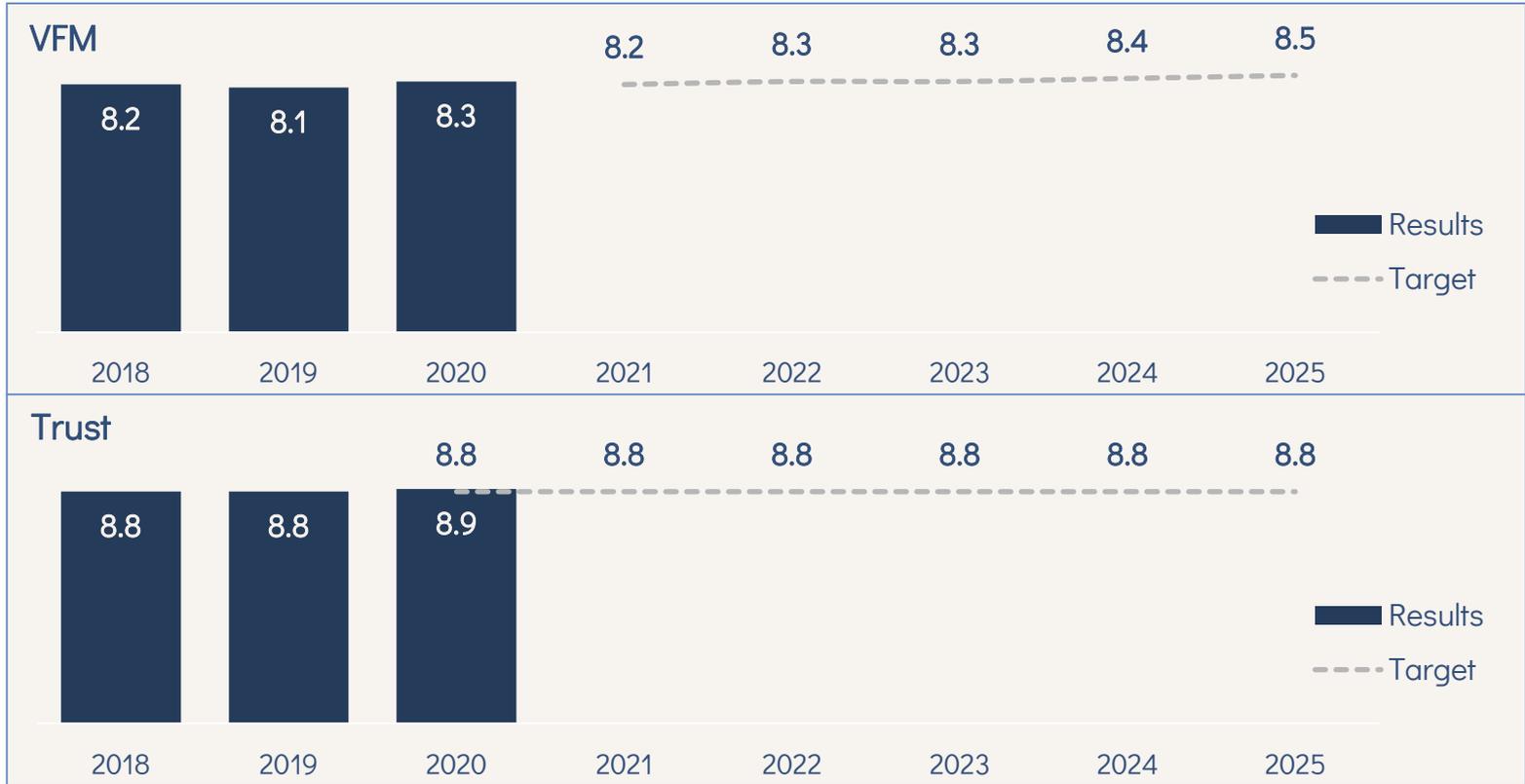
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Progress towards targets, 1 (2020 result is YTD)





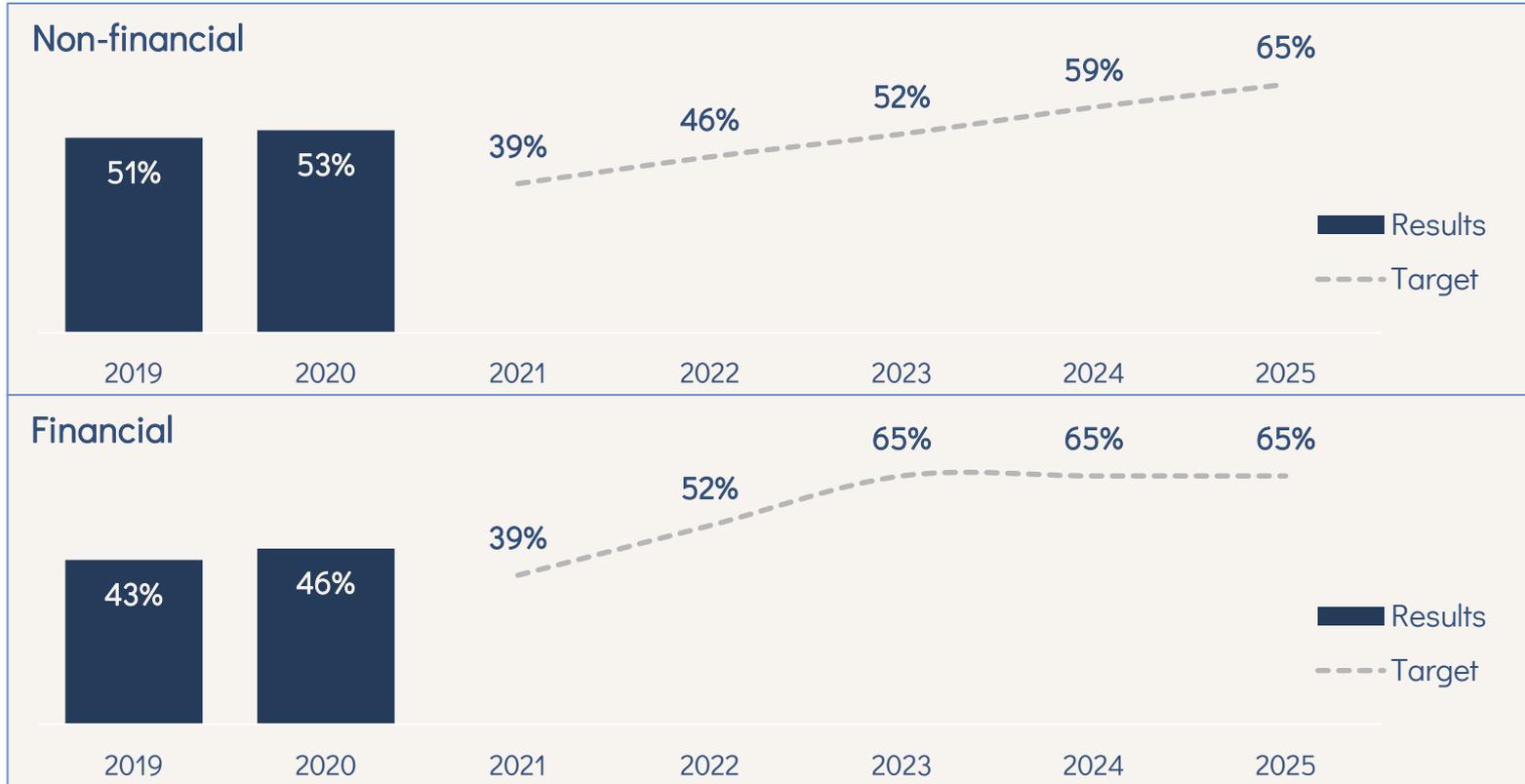
Progress towards targets, 2 (2020 result is YTD)





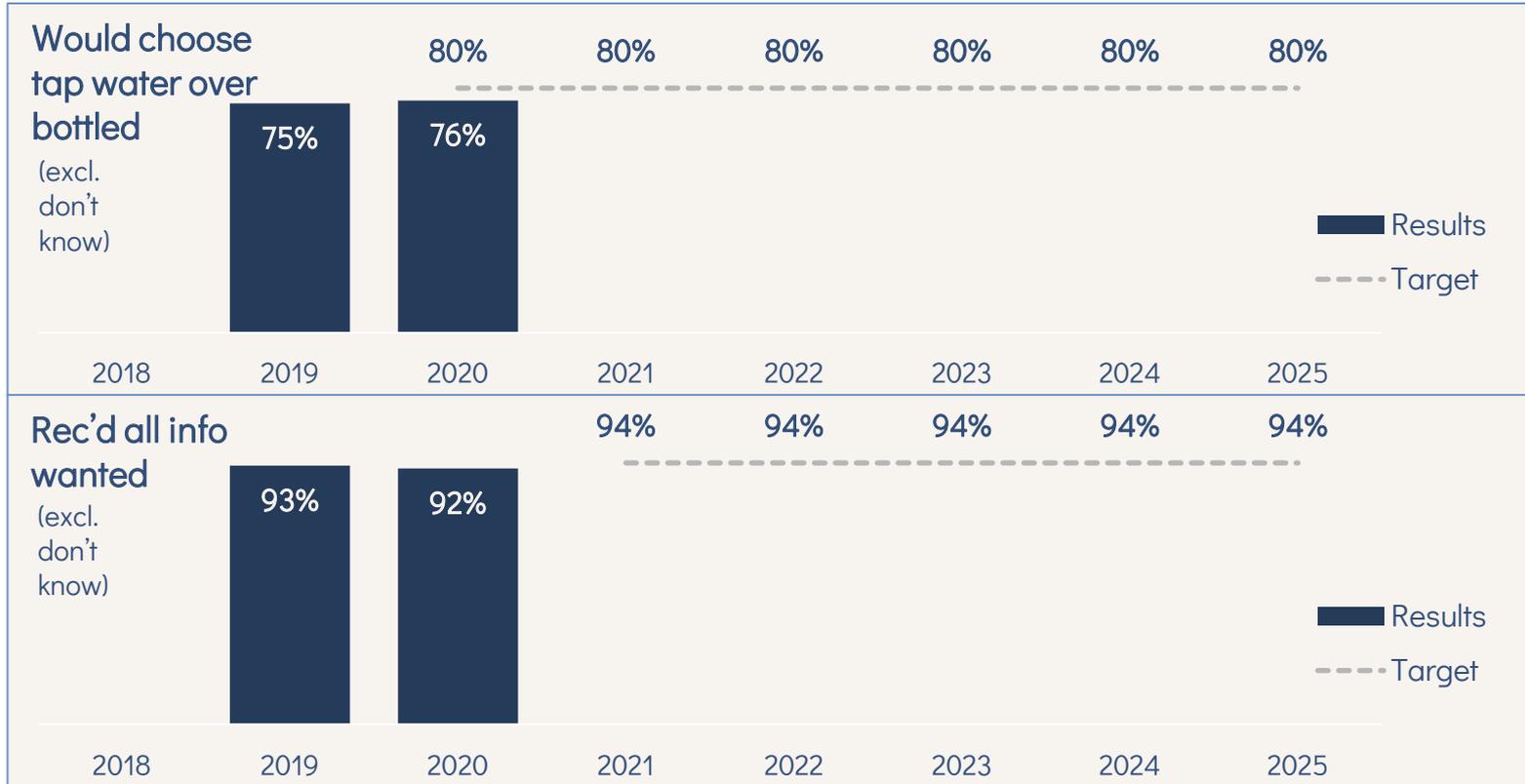
Progress towards targets, 3 (2020 result is YTD)

Awareness of additional support





Progress towards targets, 4 (2020 result is YTD)





DEFINING THE **CLEAREST** DIRECTION

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THANK YOU

NWG
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All of our work is carried out in accordance with the requirements of the international quality standard specific to the market research industry, ISO 20252

