

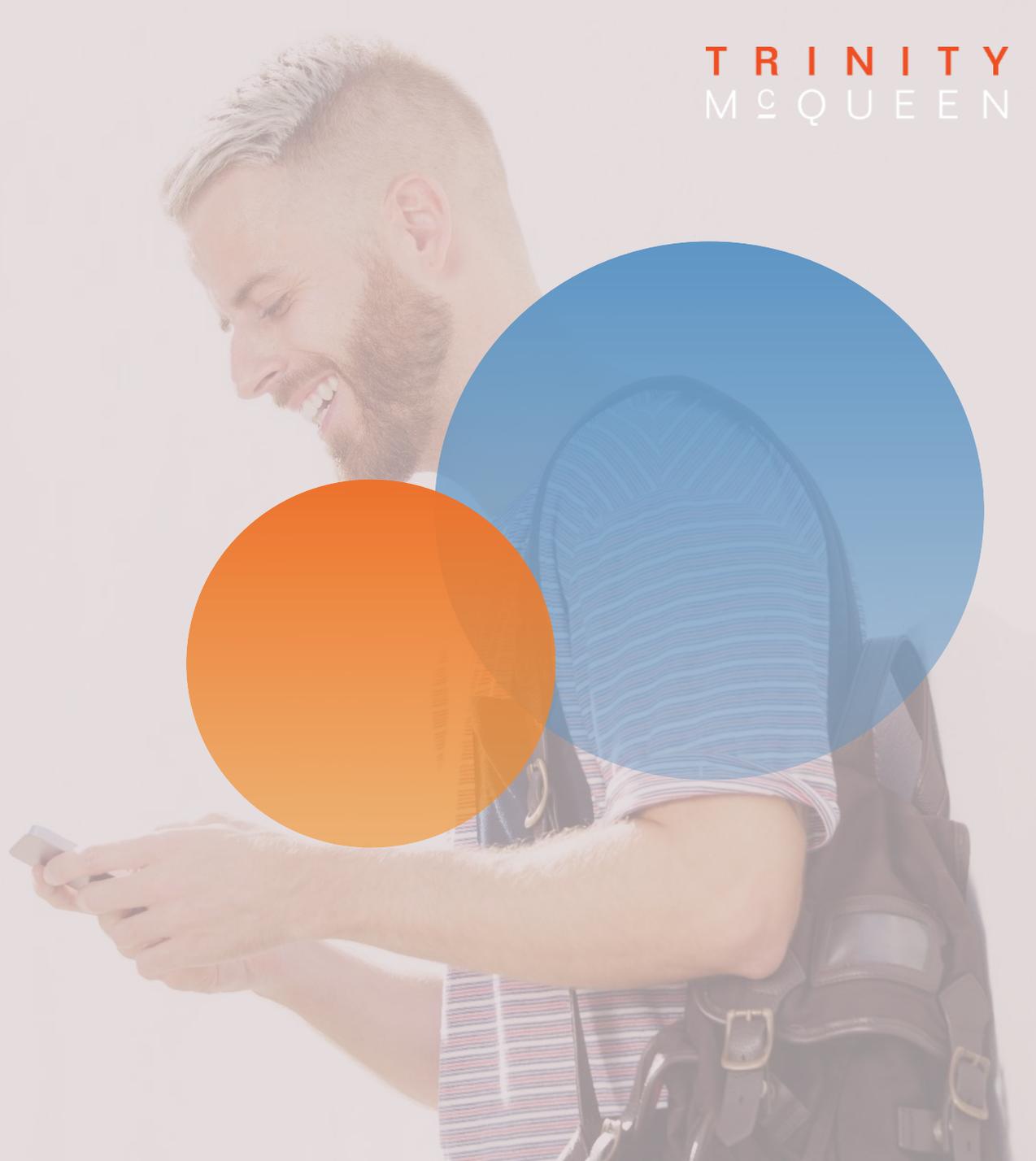
Q2'22 Domestic Tracker

NWG

08/06/22

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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: 4th - 18th May 2022

Average interview length: 16.5 min

Location	Interviews
North	317
Essex	183
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

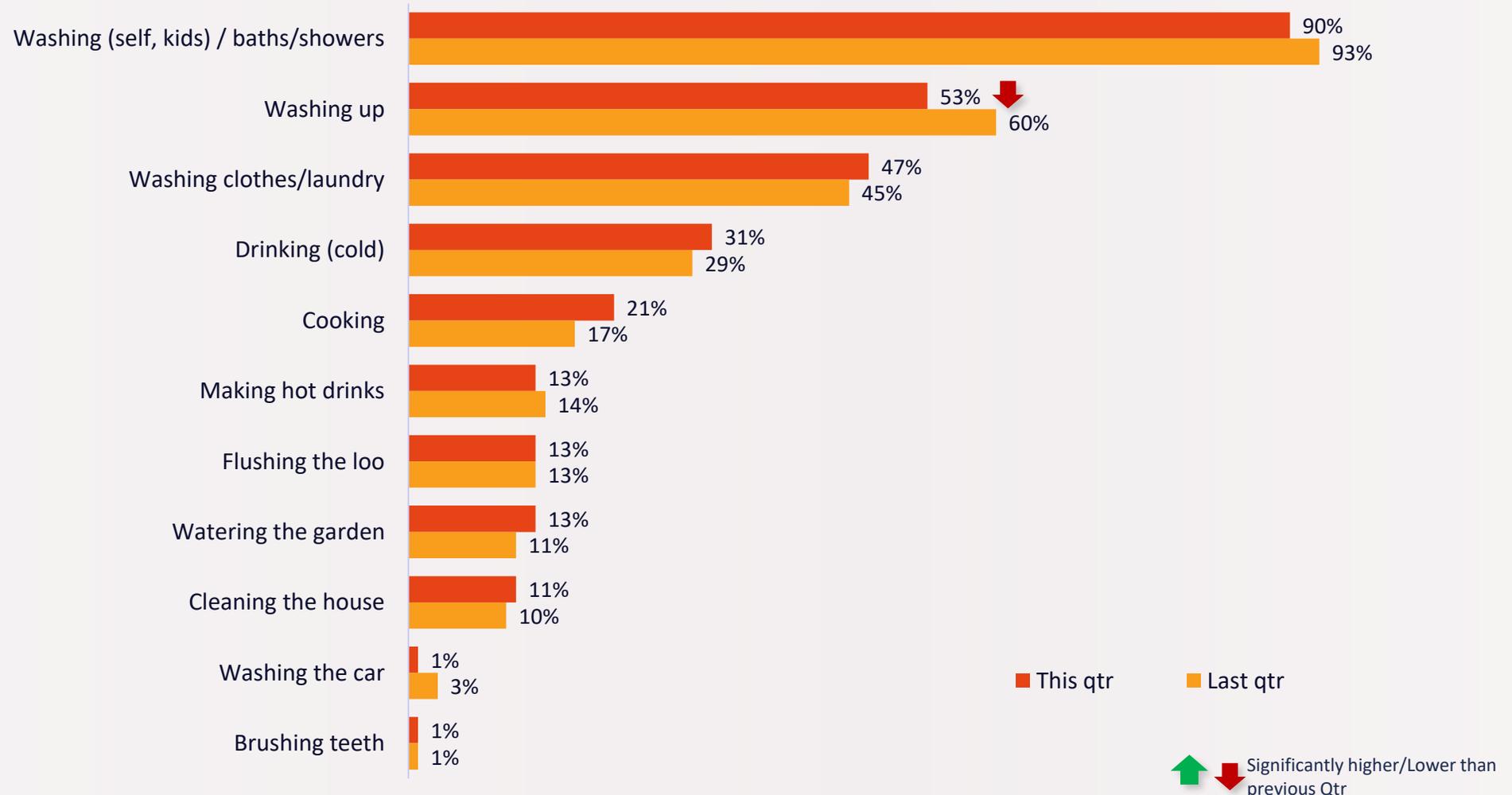
NPS



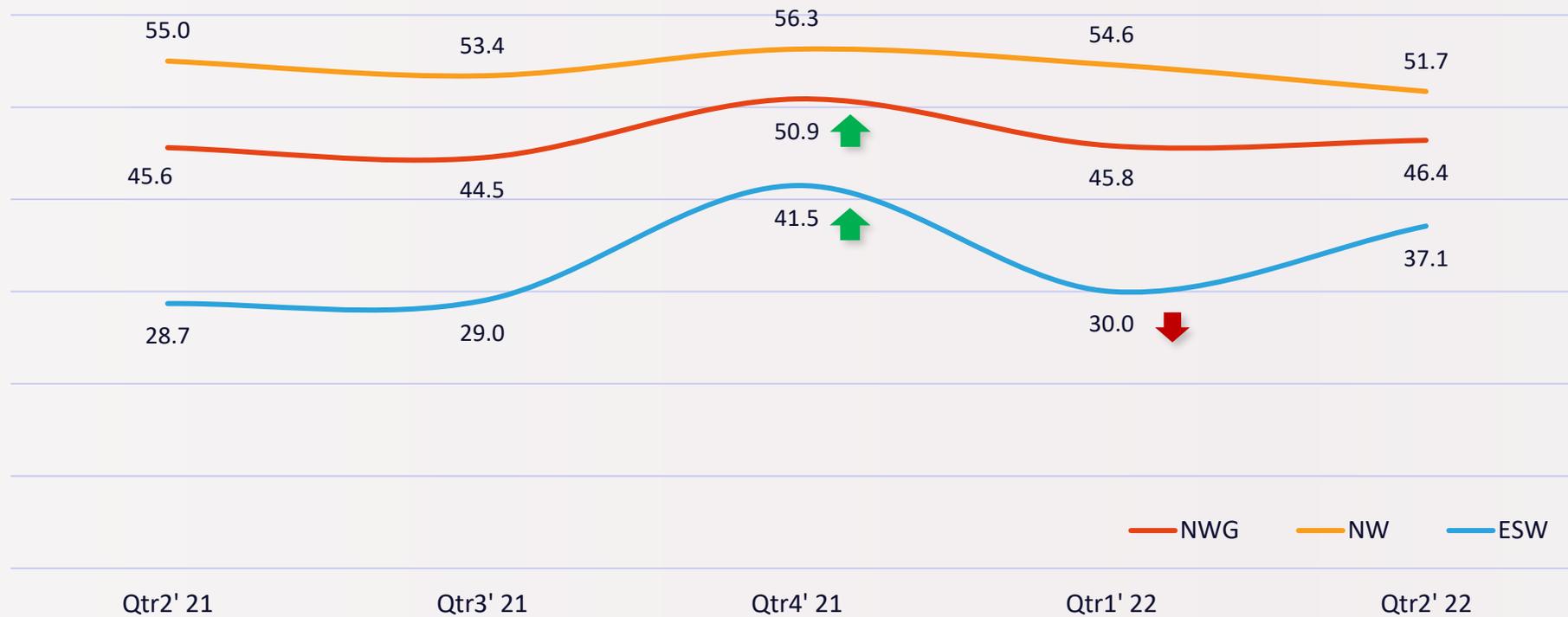
NWVG
living water

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 (317), ESW (183)

Top reasons for NPS scores this wave

Promoters (scores of 9-10) - 275 customers

• No problems	58%
• Been with them for years	11%
• No supply problems	10%
• Good service/customer service	9%
• Quick response/resolution	9%
• Good experience/happy with them	9%
• Good water quality	8%
• Good company/good in general/do a good job	7%
• Helpful	6%
• Informed/alerted of any issues/works etc	6%
• Good/fair price/good value	4%
• Easy/straightforward/simple	4%
• Other	3%
• Good billing system - timely/accurate etc	3%
• Nothing to compare against/no choice/no real dealings	15%

Passives (scores of 7-8) – 122 customers

• No problems	46%
• Good service/customer service	10%
• Good company/good in general/do a good job	8%
• Expensive	7%
• No supply problems	7%
• Been with them for years	7%
• Good experience/happy with them	6%
• Good/fair price/good value	6%
• Efficient	6%
• Ok/fine/satisfied	5%
• Other	5%
• Quick response/resolution	3%
• Good water quality	3%
• Poor water quality	3%
• Nothing to compare against/no choice/no real dealings	16%

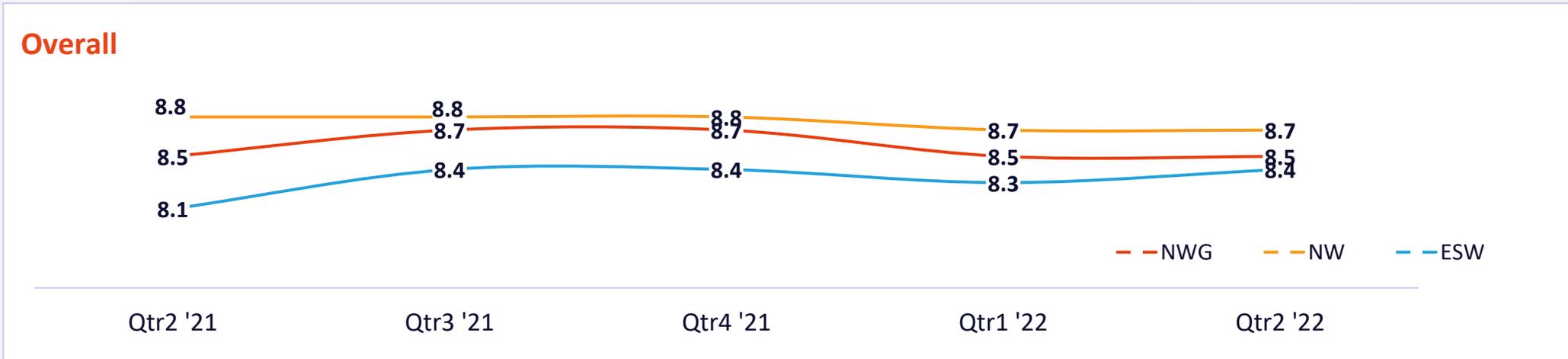
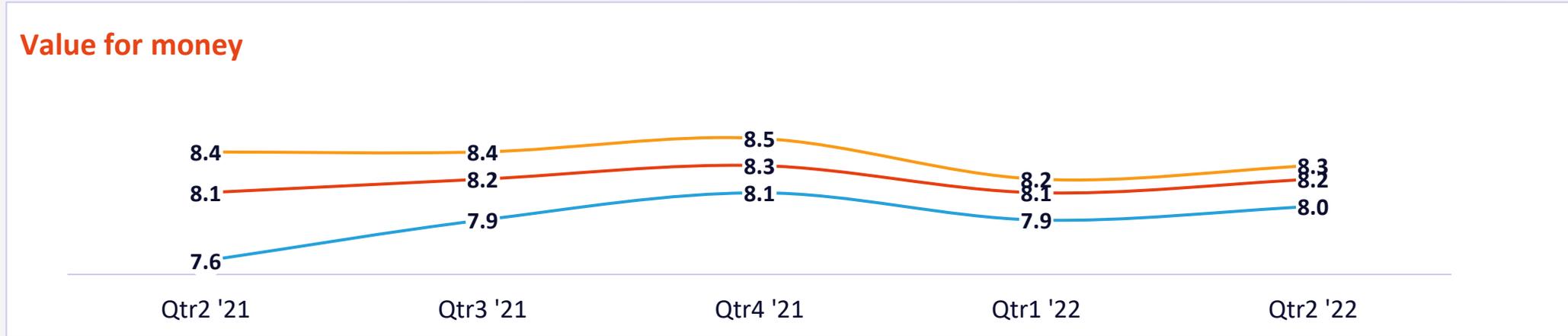
Detractors (scores of 0-6) – 62 customers

• No problems	11%
• Expensive	8%
• Don't recommend anything to anyone/no one to recommend to	8%
• No supply problems	8%
• Poor experience with them	6%
• Only interested in profit	6%
• Neutral/indifferent	5%
• Poor water quality	5%
• Don't/won't take responsibility/refused to do anything	5%
• Good experience/happy with them	5%
• Other	5%
• Improvements needed to billing system - clearer/accurate	3%
• Ok/fine/satisfied	3%
• Poor communication/don't return calls/updates etc	3%
• Nothing to compare against/no choice/no real dealings	27%



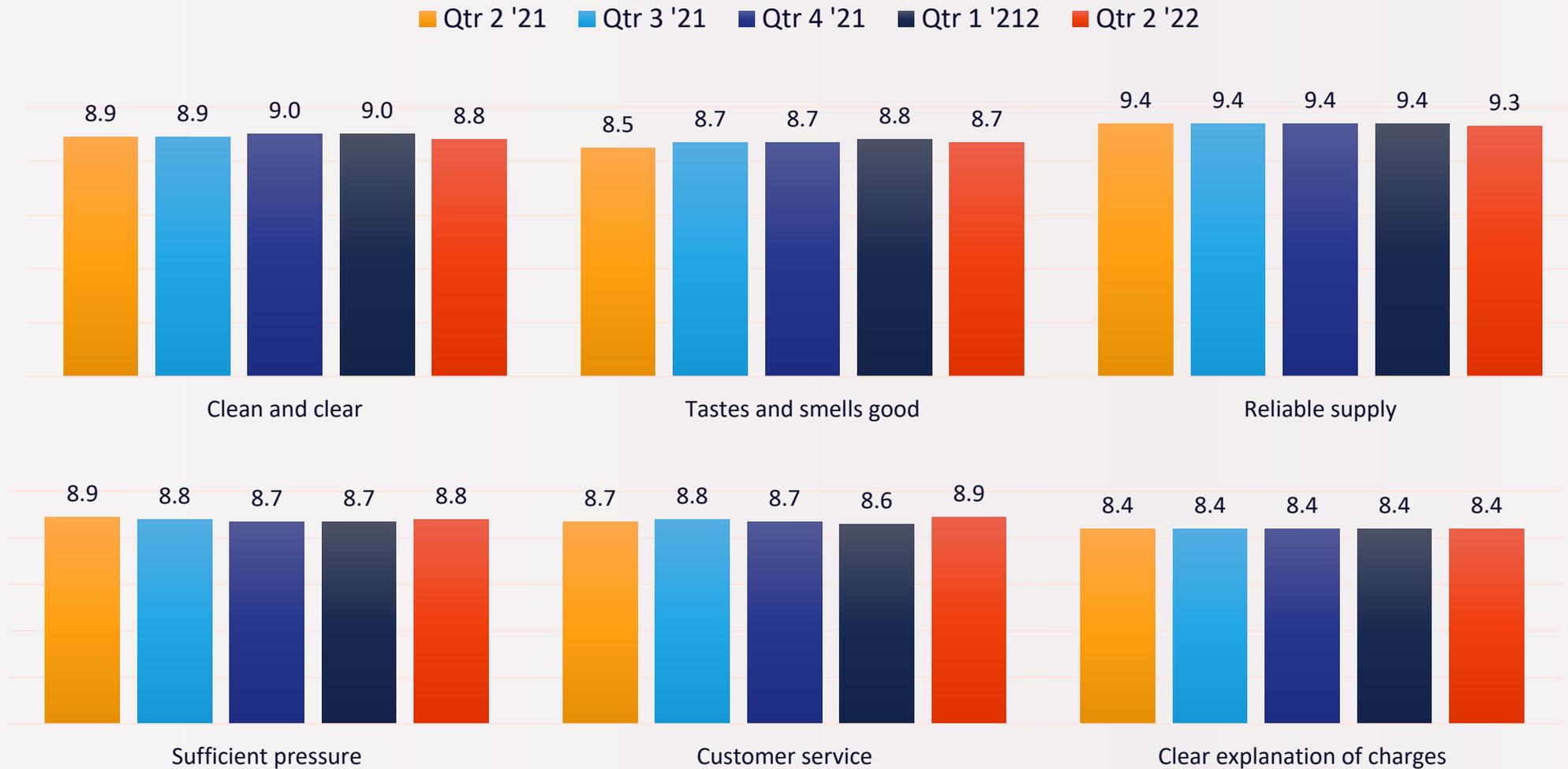
Overall Satisfaction

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 (317), ESW (183)

Service satisfaction 1 (NWG)





 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)

Service satisfaction 1 (by region)

Clean and clear	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	9.1	9.1	9.2	9.1	9.0
ESW	8.6	8.7	8.8	8.9	8.5 ↓
Tastes and smells good	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	8.7	8.8	8.8	8.8	8.8
ESW	8.1	8.4	8.4	8.7	8.4
Reliable supply	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	9.4	9.4	9.5	9.4	9.4
ESW	9.2	9.3	9.3	9.4	9.2

  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(317) ESW (183)

Service satisfaction 1 (by region)

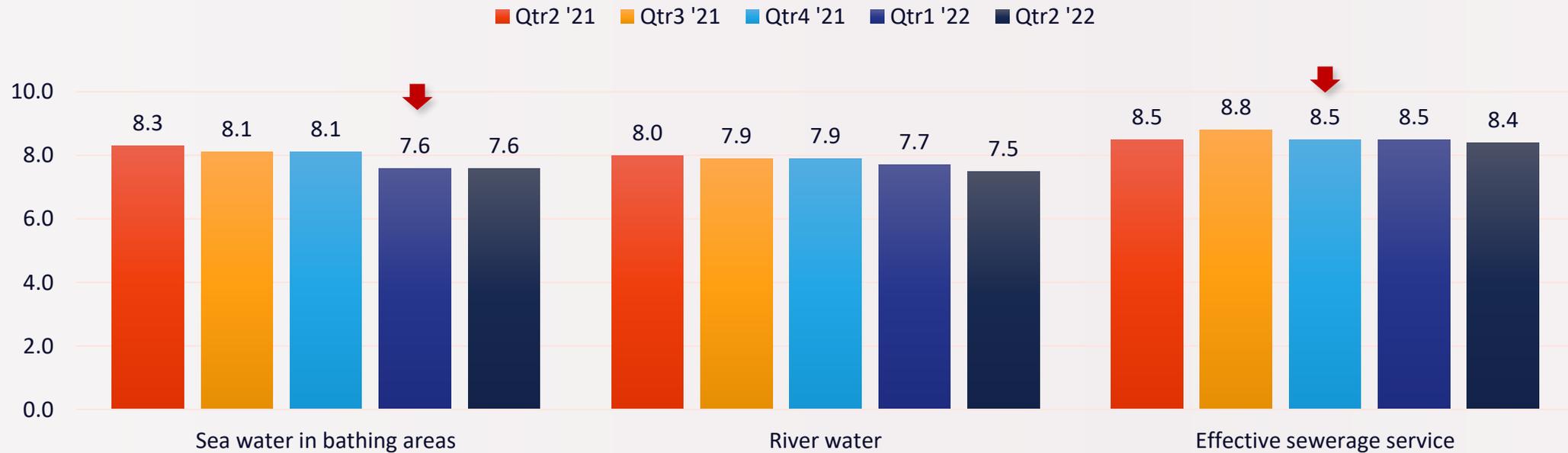
Sufficient pressure	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	9.0	8.9	8.9	8.8	8.6
ESW	8.6	8.6	8.4	8.4	8.6
Customer service	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	8.9	8.9	8.7	8.8	8.8
ESW	8.2	8.7	8.7	8.2 ↓	8.4
Clear explanation of charges	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	8.6	8.6	8.5	8.5	8.5
ESW	8.0	8.2	8.3	8.2	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(317) ESW (183)

Service satisfaction 2 (NW)



  Significantly higher/Lower than previous Qtr

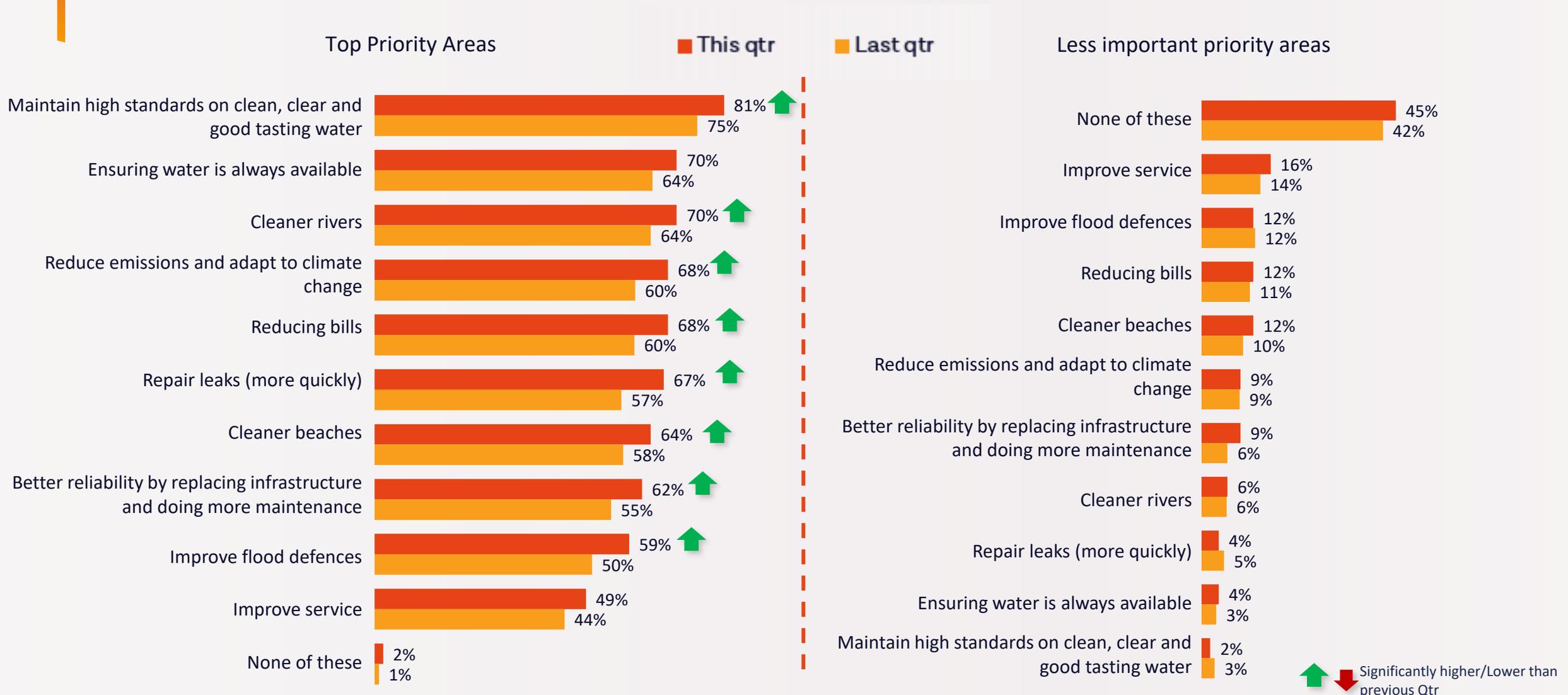
Q4 I am now going to read out a number of aspects of [Northumbrian Water / Essex & Suffolk Water]’s service, and I’d like you to tell me how satisfied you are, with each. Please use our scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied. Base NW (317)

Top improvements required on service issues

Gave any low scores (0-6) – 178 customers

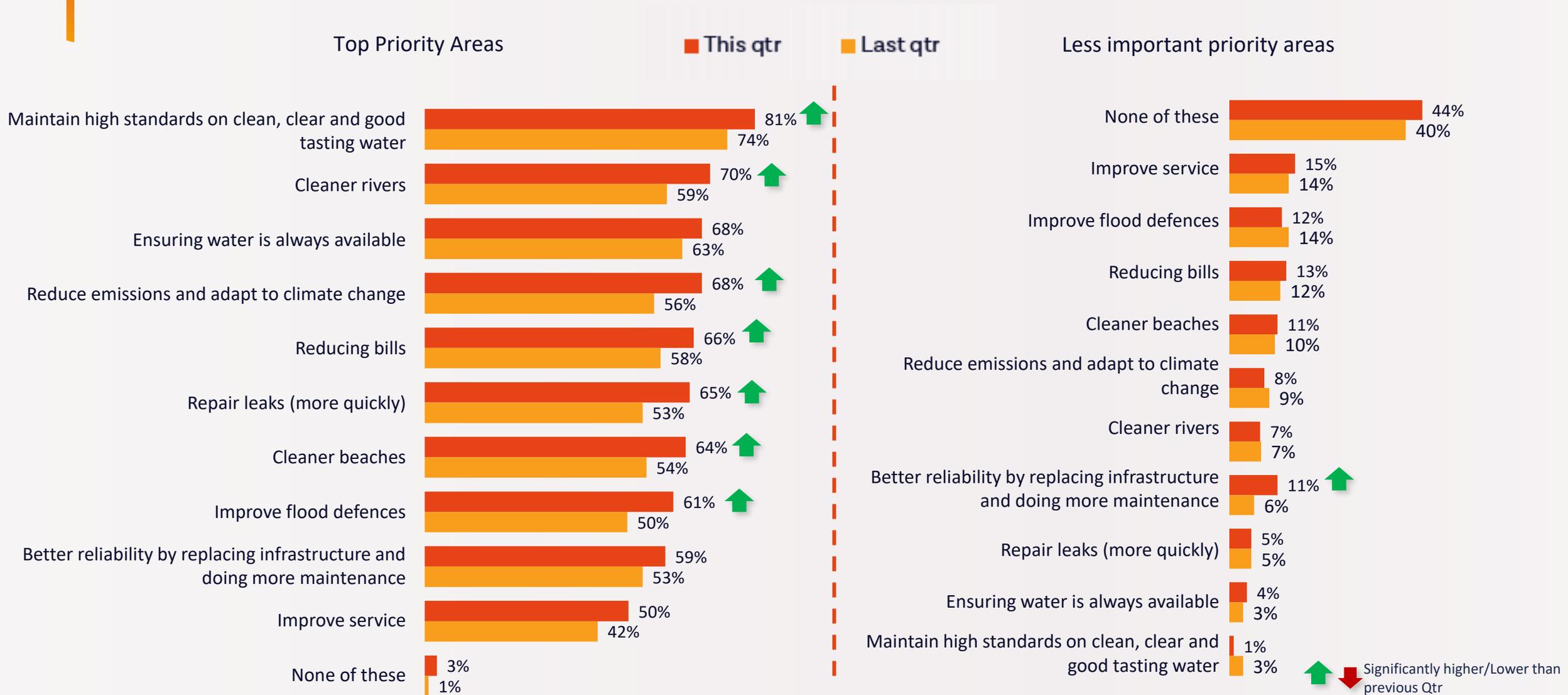
• Any improvements mentioned	87%
• Improve quality/taste/smell of water	29%
• Cleaner rivers/sea	16%
• Improve water pressure	9%
• Replace old infrastructure/improve capacity	9%
• More detail/clarity on charges	8%
• Better ongoing sewer/pipes maintenance	7%
• Cleaner beaches	7%
• More accurate bills/read meters more often	5%
• Other	5%
• Reduce prices	4%
• More information on their services/what they do	3%
• Listen to customers/do as they ask	3%
• Quicker resolution of issues/problems	2%
• Improve flood defences	2%
• Do more for the environment	2%

Priority areas (NWG)



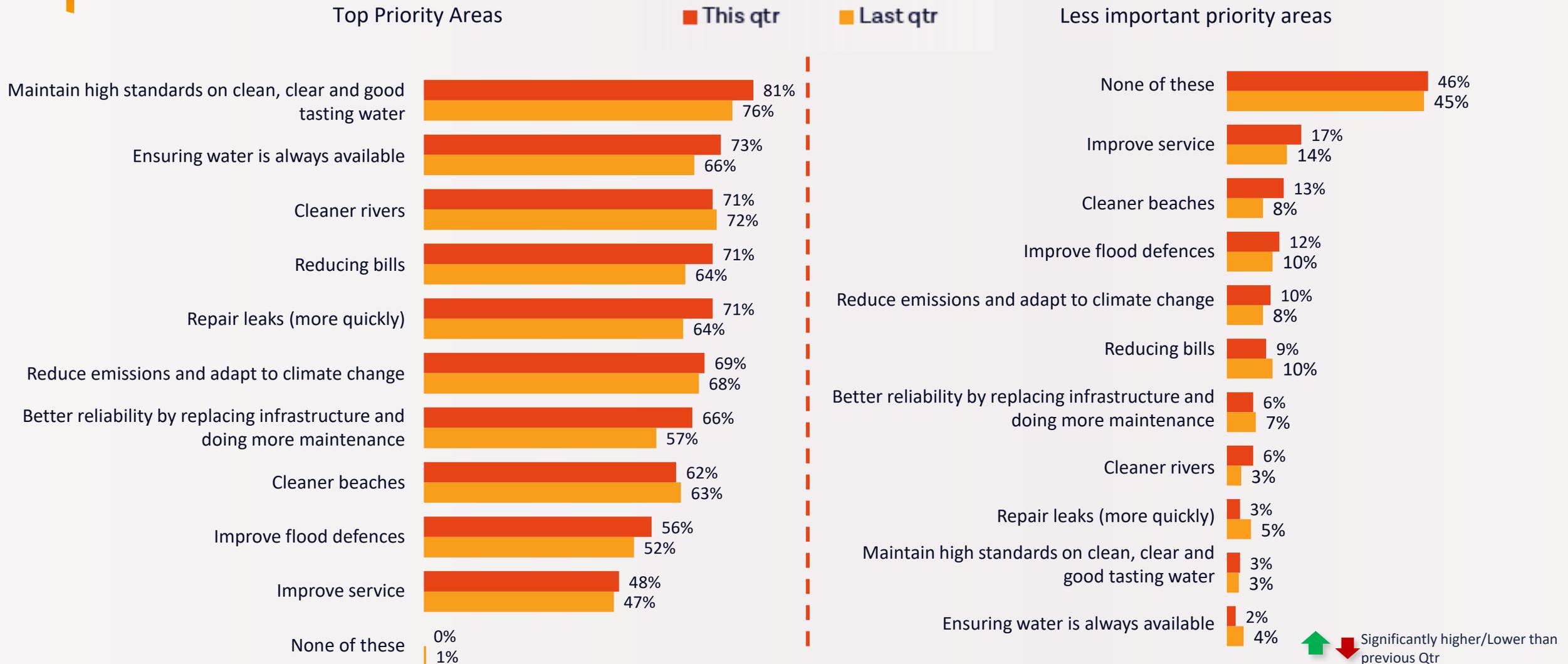
↑ Significantly higher/Lower than previous Qtr
↓

Priority areas (NW)

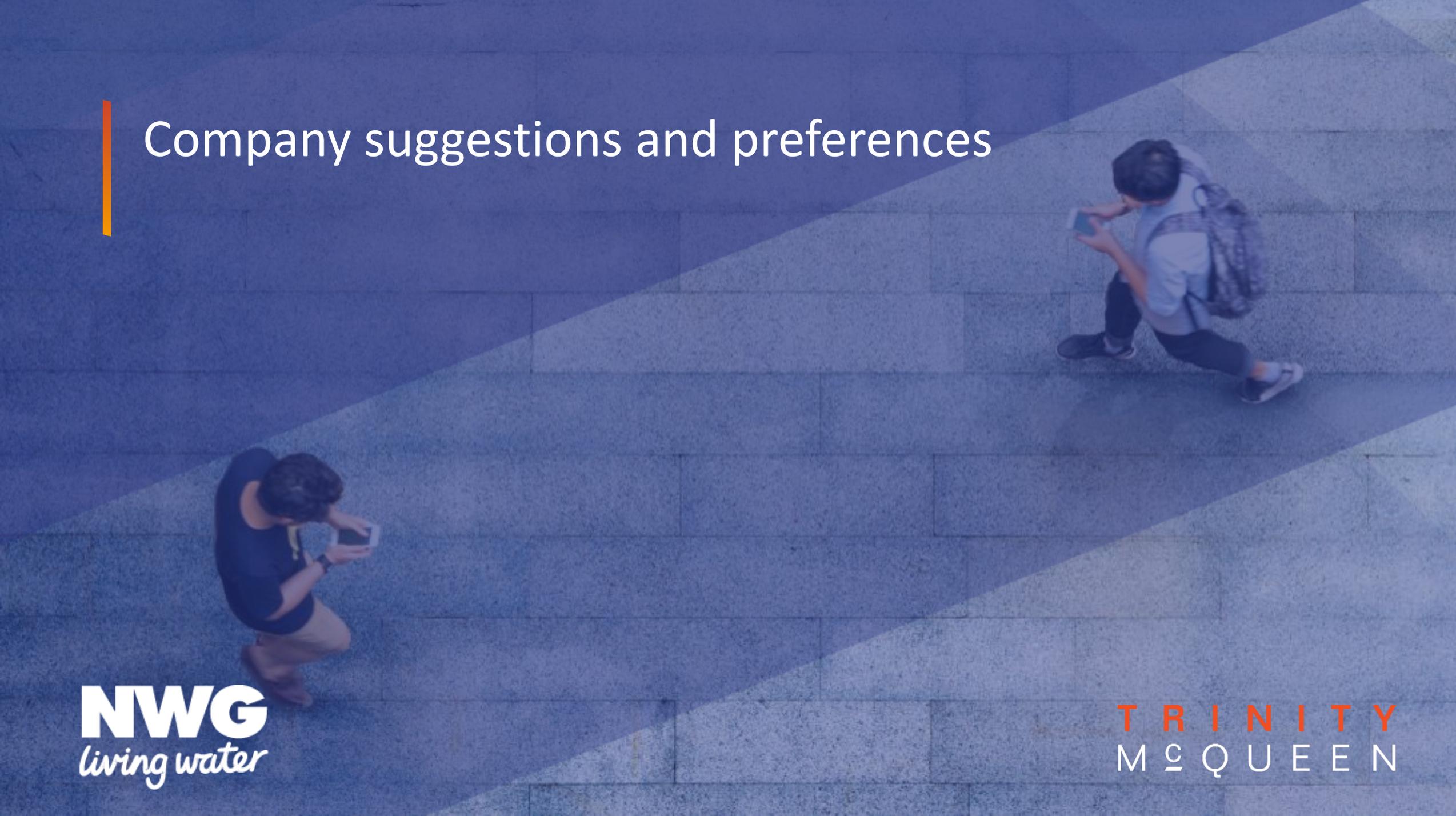


Q5c. So, which of these would you say should be priority areas for [Northumbrian Water / Essex & Suffolk Water]? Q5d. Q5d. And which of these, if any, do you think is less important for them to focus on? Base: NW (317)

Priority areas (ESW)

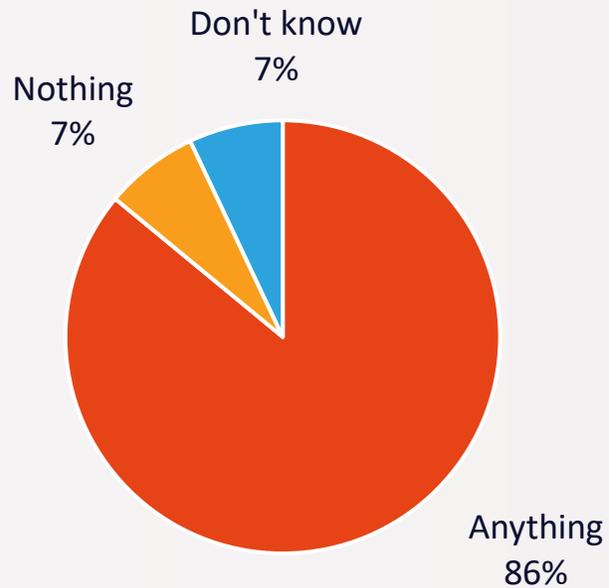


Q5c. So, which of these would you say should be priority areas for [Northumbrian Water / Essex & Suffolk Water]? Q5d. Q5d. And which of these, if any, do you think is less important for them to focus on? Base: ESW (183)



Company suggestions and preferences

What the company does well



All respondents - 500 customers

Top 15

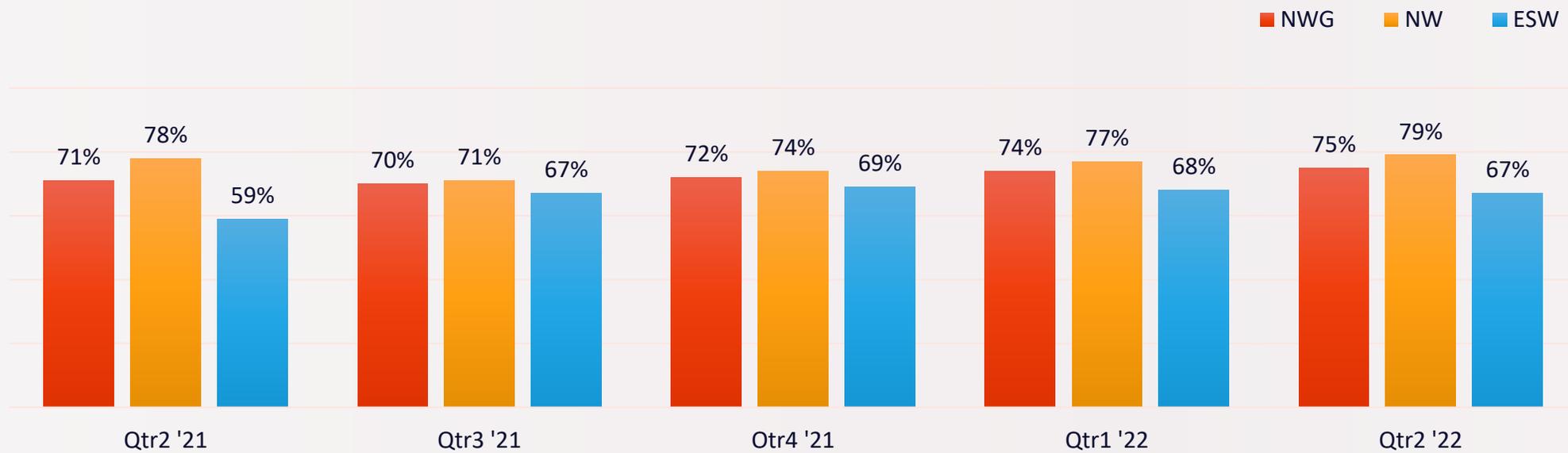
- Reliable supply of water 40%
- Good quality water / tastes/smells good 21% ↓
- Never had any problem/never need to contact them 15% ↑
- Respond quickly to issues/problems/resolve issues 9%
- Helpful/friendly/professional call centre staff 7%
- Notify customers if there are going to be works 7% ↑
- Good service/ customer service 6%
- Keep customers informed of progress on issues raised 5%
- Timely/accurate bills 4%
- Fair prices 4%
- Repair leaks quickly 4%
- Good water pressure 3%
- Good ongoing maintenance of sewers/pipes 3%
- Easy to contact 2%
- Do a good job 2%

↑ ↓ Significantly higher/Lower than previous Qtr

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

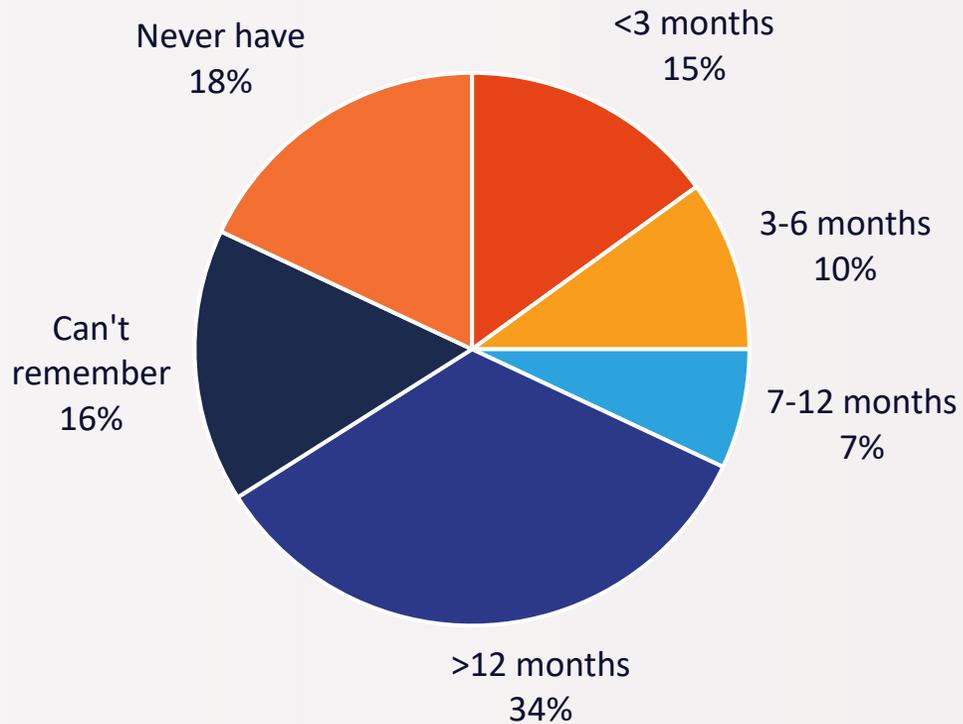
Tap water preference

Prefer to drink tap water

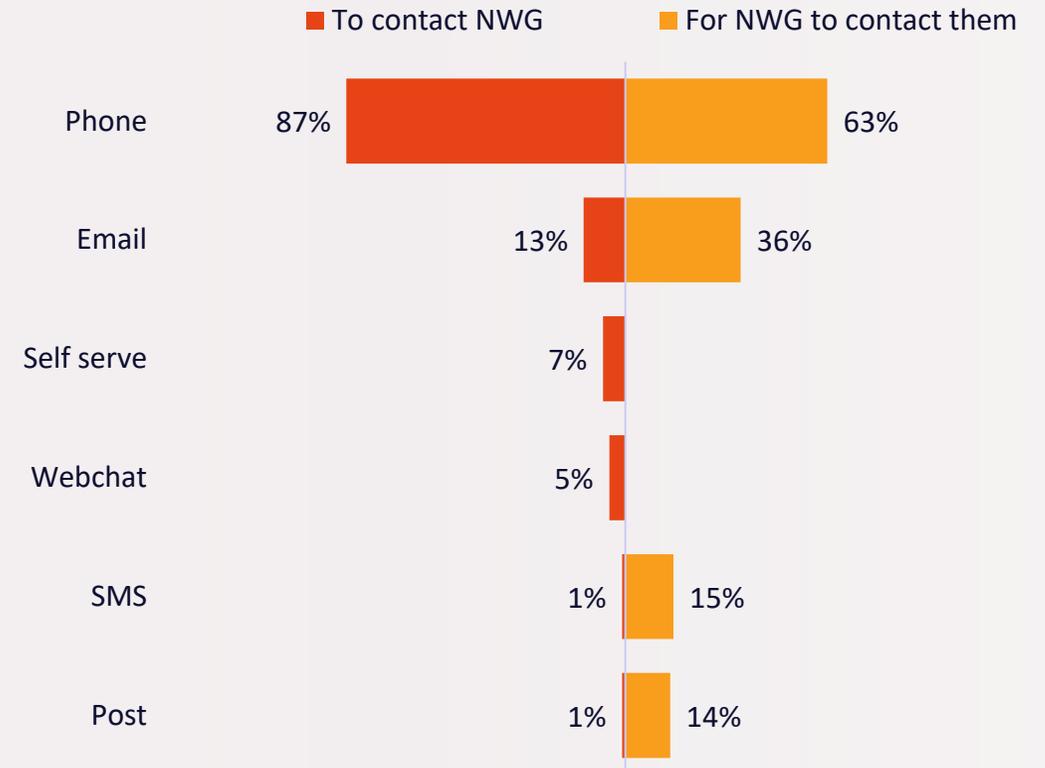


Contact

When last had contact with NWG



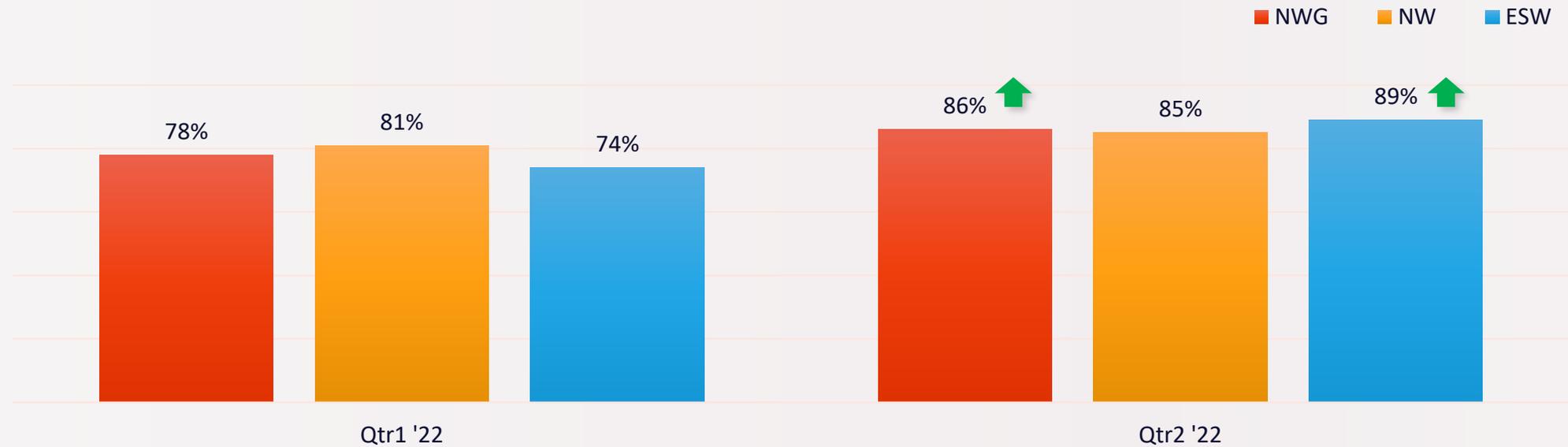
Preferred contact methods



↑ Significantly higher than previous Qtr
↓ Significantly 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



↑ Significantly higher/Lower than previous Qtr
↓



Brand values

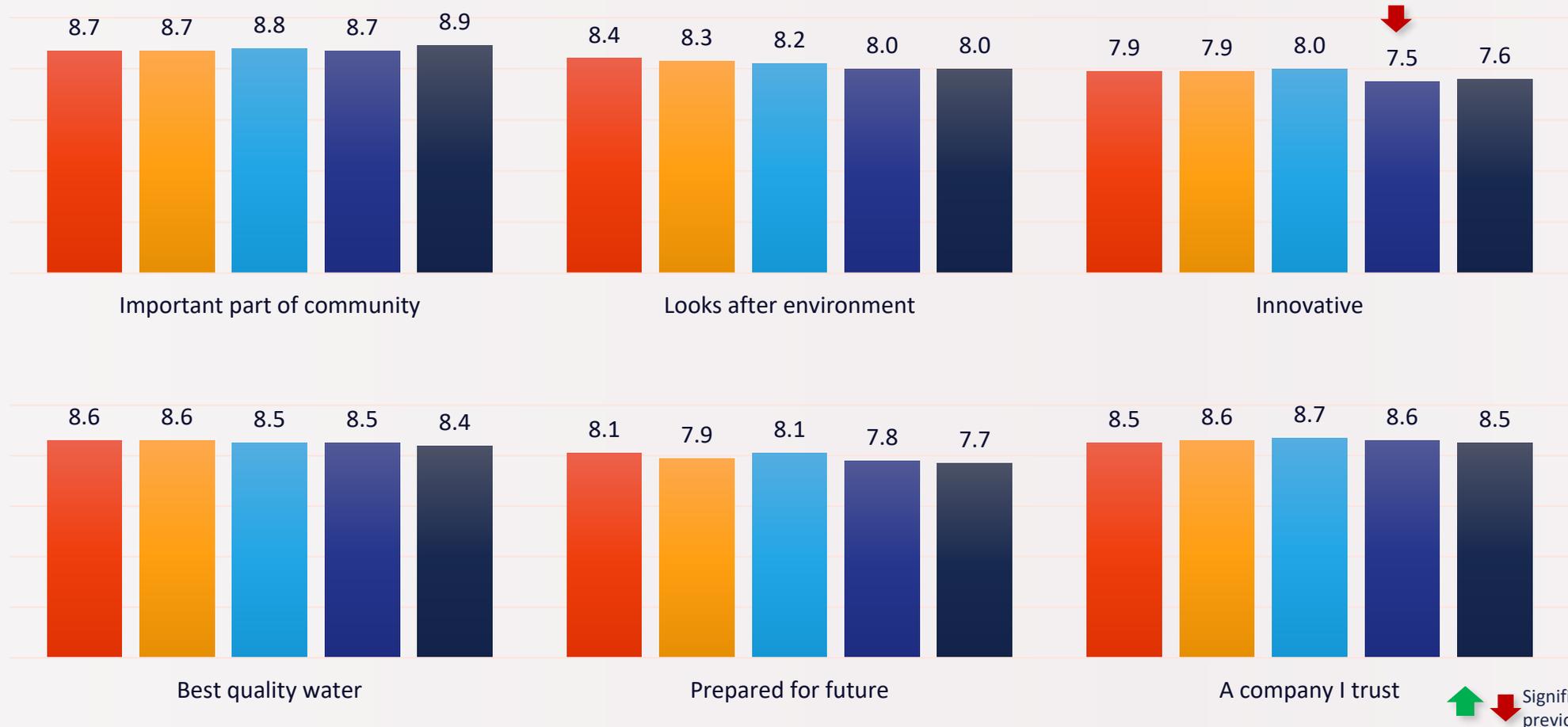


NWVG
living water

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

Brand values (NWG)

■ Qtr2 '21
 ■ Qtr3 '21
 ■ Qtr4 '21
 ■ Qtr1 '22
 ■ Qtr2 '22



↑ ↓ 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)

Brand values (by region)

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

  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 (317), ESW (183)

Brand values (by region)

Best quality water	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	8.9	8.8	8.7	8.7	8.7
ESW	7.9	8.3	8.2	8.3	8.1
Prepared for future	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	8.4	8.1	8.2	8.0	7.7
ESW	7.6	7.6	7.9	7.5	7.7
A company I trust	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
NW	8.8	8.7	8.8	8.8	8.6
ESW	8.0	8.4	8.6	8.3	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 (317), ESW (183)

Comments relating to trust score

All respondents - 500 customers

• Never had any problems	29%
• Reliable water supply	16%
• No reason not to trust them/just trust them	15%
• Good quality water supply	10%
• Good customer service/good service	8%
• Quick response/resolution to issues etc	7%
• Happy with them/do a good job	7%
• Never hear anything bad about them/good reputation	6%
• Reliable/trustworthy	6%
• Been with them a long time	5%
• Deal with issues/problems/solve queries	4%
• Notify customers of any works/issues/problems etc	4%
• Good (previous) experience	4%
• Easy to contact/always available	3%
• Good communication	3%
• Do not know enough about them to comment/no real dealings/no reason/don't think about it	10%
• Have no option/monopoly/not aware of anyone else	7%

I have never had any trouble with them and they are always really good. If there is a water supply interruption, they inform me in time, they are no problem at all.
- Trust score 7-10

When we have had contact with them they have been very good
- Trust score 7-10

I've never had problems with them, there's constant supply of water, and if they're going to stop the water they let us know in advance.
- Trust score 7-10

From previous issues I have had with them it has been extremely poor customer service and communication. They resolved the issue but didn't tell us why and this was after paying a high price for a couple of years.
- Trust Score 0-6

I can't trust someone who I can't get a direct answer from.
- Trust Score 0-6



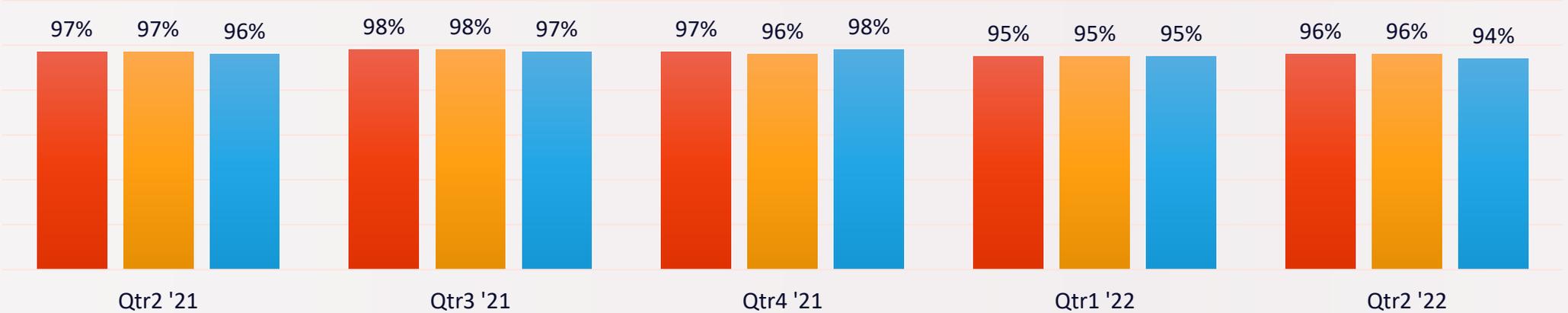
Information and services

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(317) ESW (183)

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

Sitting on hold for an hour and half, it's a lot of time to speak to someone, it's ridiculous

They make you wait on the phone on hold for 20 minutes and get nowhere

They take ages to answer the phone. I was nearly an hour on hold one time.

I would prefer if we were able to contact them by phone more easily.

I went through the app and was going round in circles trying to find how to contact them, and to get basic information about the meter, and when I did phone, I was on hold for quite a while.

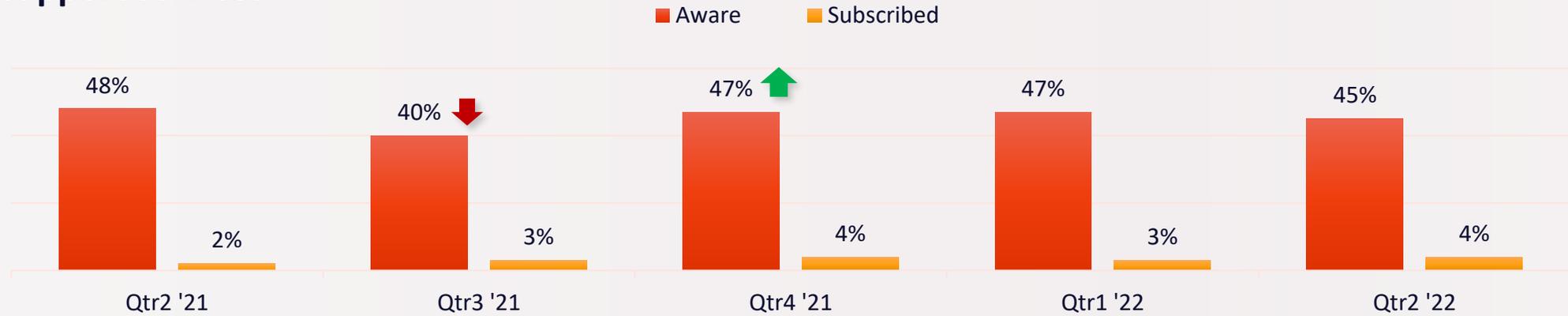
Put on hold and takes ages to answer.



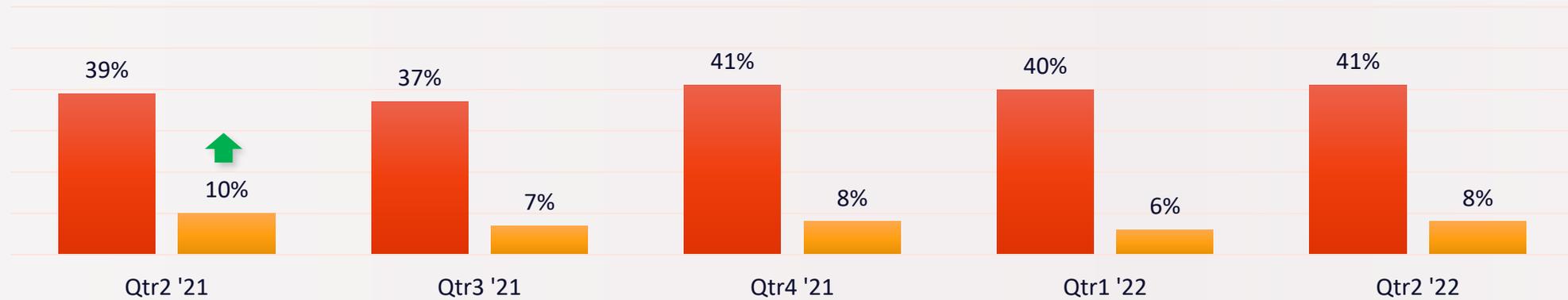
Priority services

Priority services (NWG)

Additional support services



Additional financial support



Significantly higher/Lower than previous Qtr

Priority services (by region)

NW	Additional support services	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
	Aware	49%	39% ↓	47%	47%	43%
Subscribed	2%	4% ↑	3%	2%	3%	
NW	Additional financial support	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
	Aware	39%	36%	41%	39%	39%
Subscribed	10%	7%	7%	6%	7%	

ESW	Additional support services	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
	Aware	46%	41%	47%	48%	49%
Subscribed	3%	1%	5% ↑	4%	5%	
ESW	Additional financial support	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22
	Aware	39%	39%	42%	42%	45%
Subscribed	9%	7%	10%	7%	11%	



 Significantly higher/Lower than previous Qtr

Key headlines



NPS this Quarter

NWG NPS has seen a slight dip in Q2 2022. While ESW NPS has seen a slight increase after a significant decrease in Q1 2022.



Priority areas

Areas which customers think are a priority for NWG to focus on have seen significant increases vs Q1 2022. Maintaining high standards on clean, clear and good tasting water remains the top priority (81%)



Issues resolved

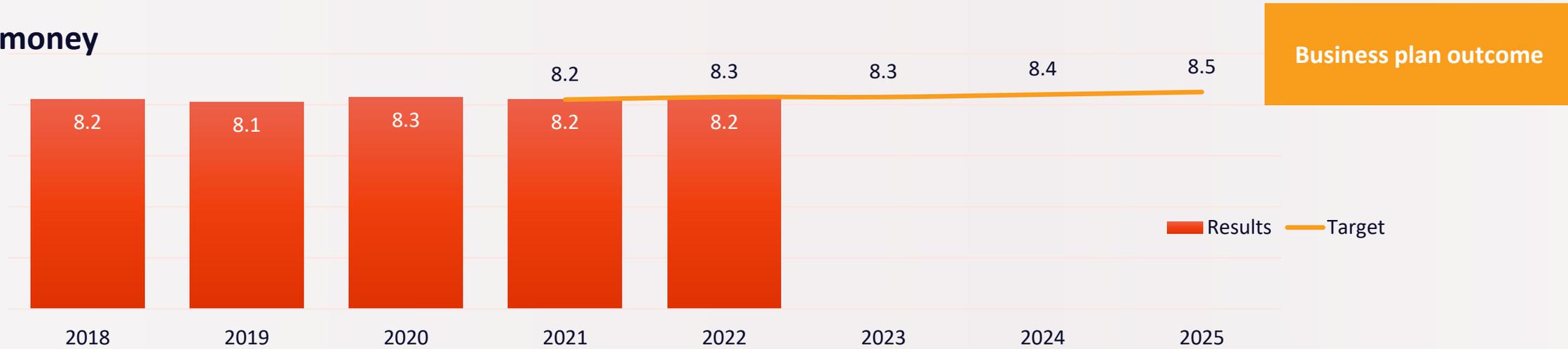
The proportion of NWG customers who had an issue and claimed it was resolved has significant increased vs Q1 2022



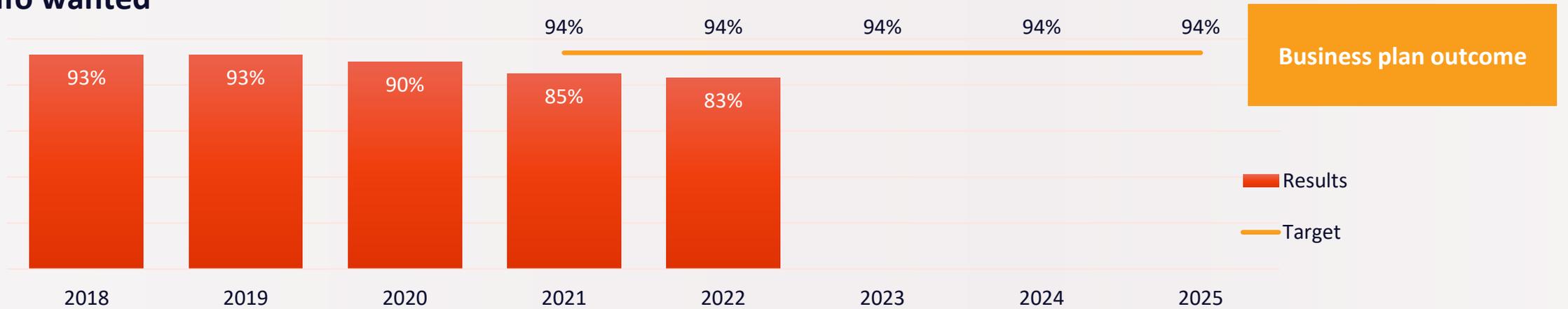
Progress and targets

Progress towards targets, 1

Value for money

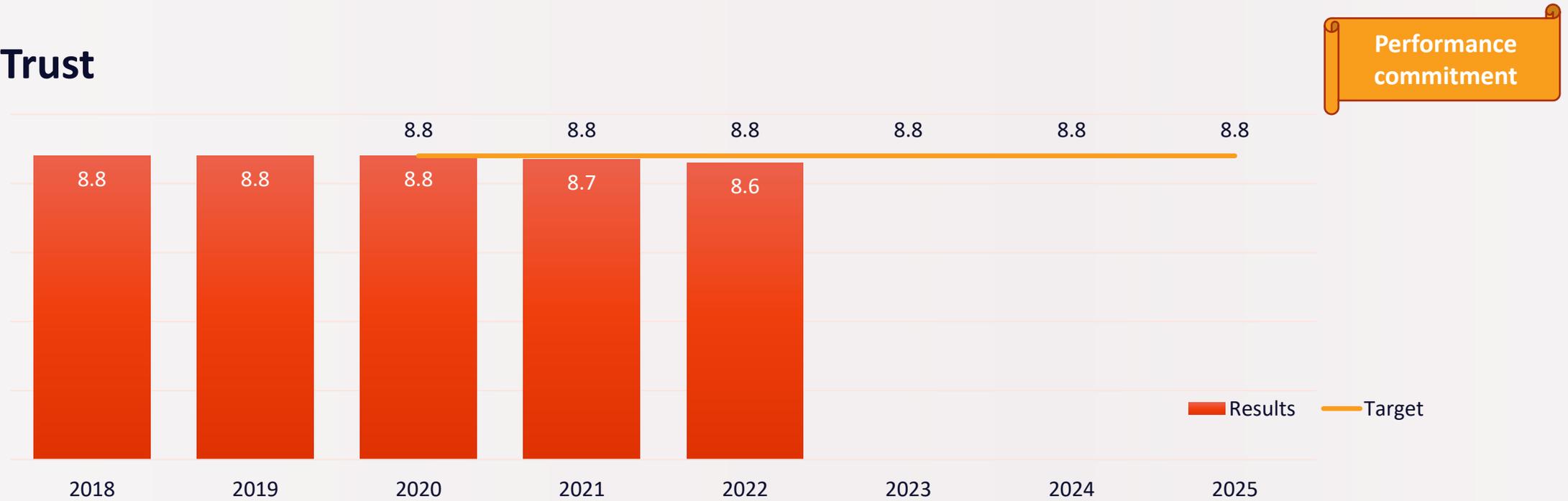


Rec'd all info wanted



Progress towards targets, 2

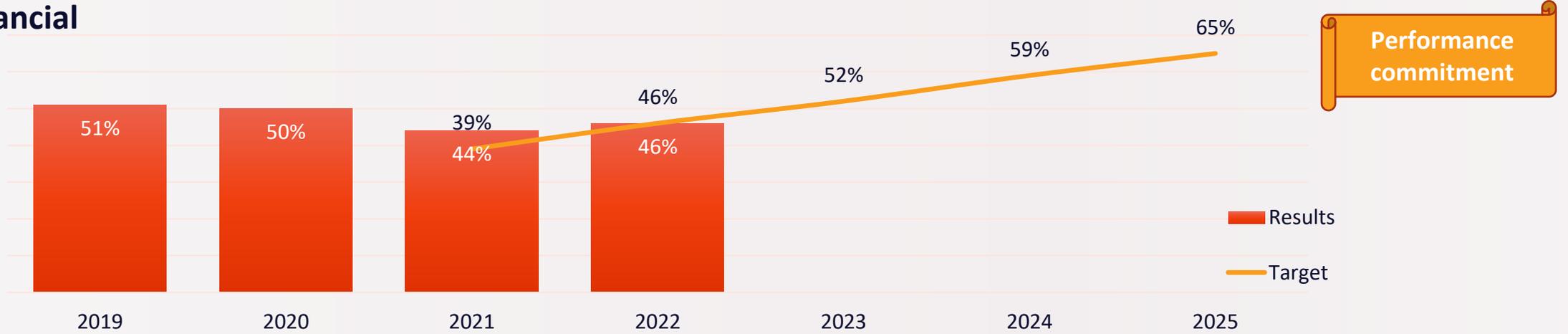
Trust



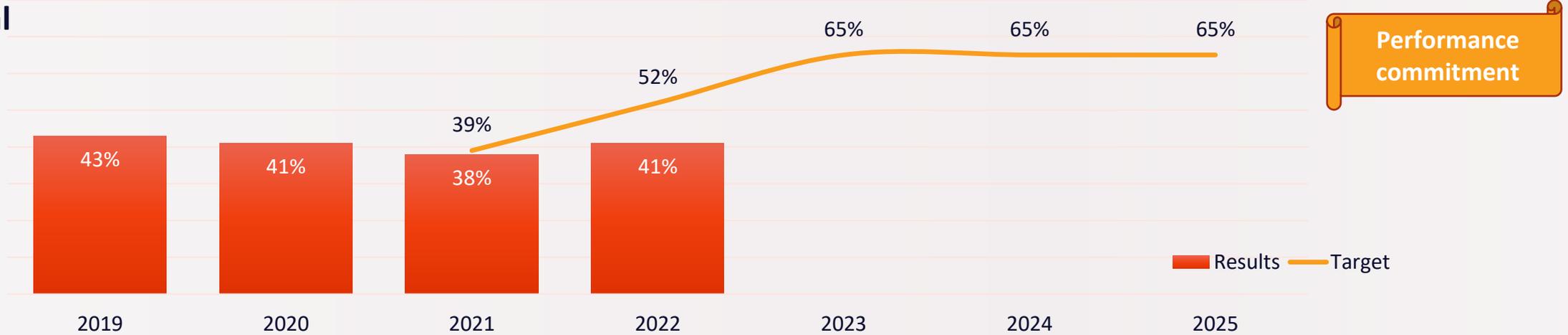
Progress towards targets, 3

Awareness of additional support

Non-financial



Financial

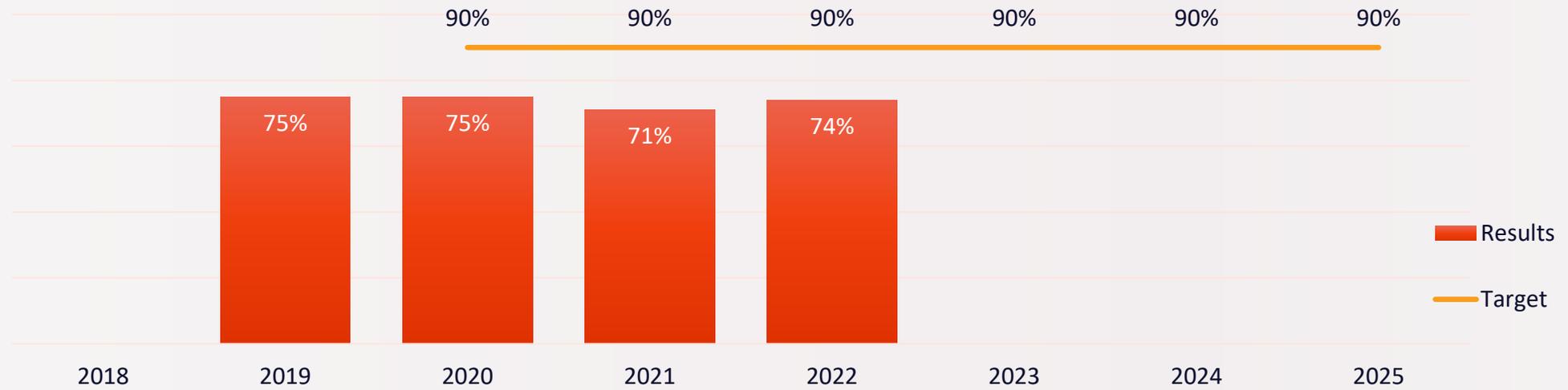


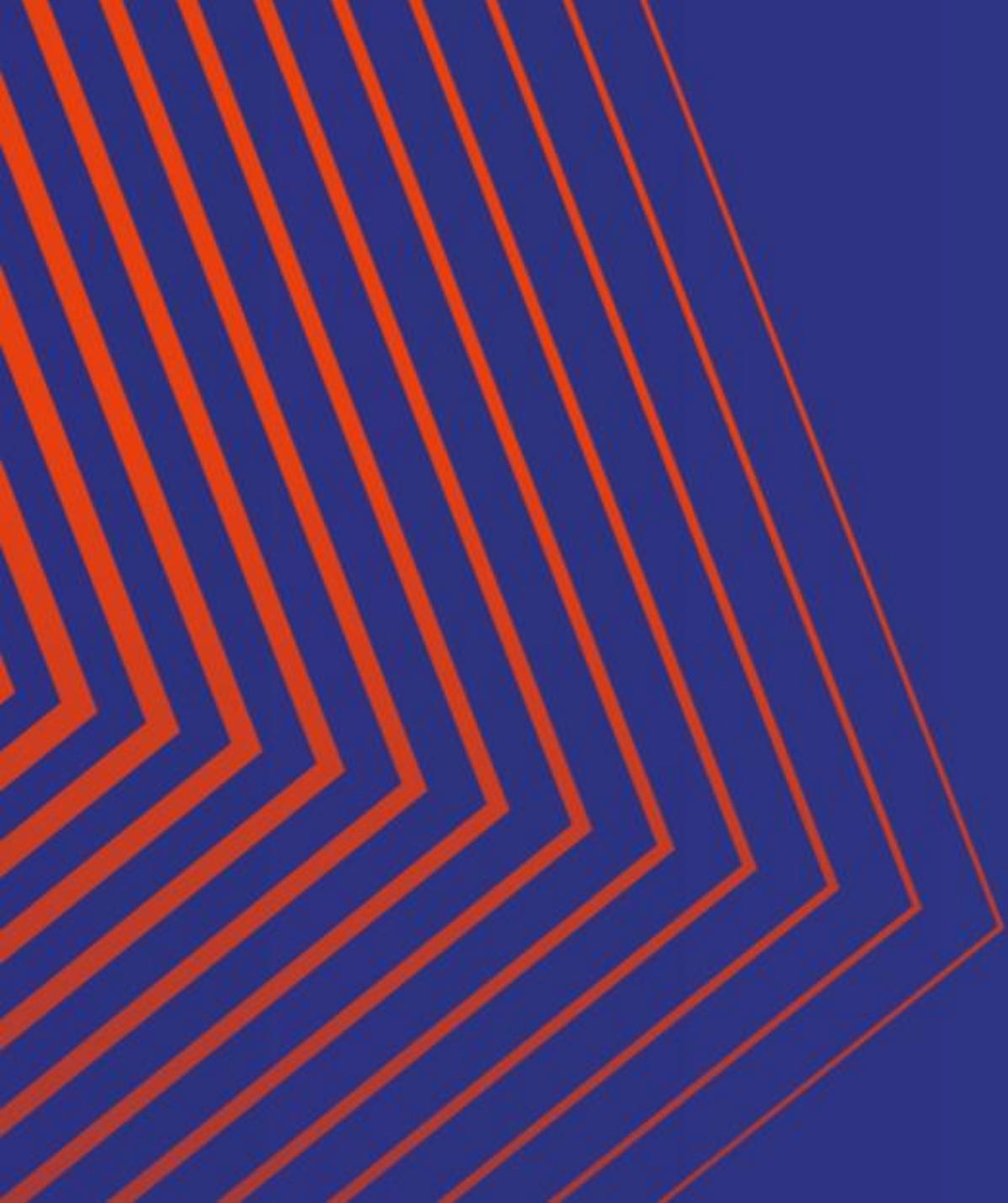
Progress towards targets, 4

Would choose tap water over bottled

(excl. don't know/ no pref)

Ambitious goal





TRINITY
MCQUEEN