



27 / 11 / 20

Domestic Tracker Results: Quarter 4 2020

Our ref. J3065.3



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

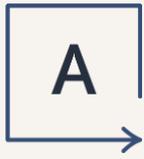
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Approach

- 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

Qtr4 2020

Fieldwork carried out:
10 - 26 November 2020



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.



NPS since this quarter last year



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Top reasons for NPS scores this wave

Promoters (scores of 9-10) - 279 customers

- No problems (52%)
- No supply problems (12%)
- Good customer service (10%)
- Good value/fair price (10%)
- Good communication/updates (10%)
- Been with them for years (8%)
- Resolve problems (7%)
- Quick response/resolution (6%)
- Good water quality (6%)
- Good experience/happy with them (5%)
- Helpful (4%)
- Reliable/trustworthy (2%)
- Polite/friendly staff/workmen (2%)
- Easy to contact (2%)

Passives (scores of 7-8) – 125 customers

- No problems (34%)
- Good customer service (10%)
- No supply problems (8%)
- OK/fine (7%)
- Always room for improvement (6%)
- Quick response/resolution (6%)
- Expensive (6%)
- Good/fair price (5%)
- Good water quality (5%)
- Good communication (4%)
- Good billing system (4%)
- Been with them for years (3%)
- Resolve problems (3%)
- Nothing to compare against/no choice/had no real dealings with them (21%)

Detractors (scores of 0-6) – 76 customers

- Expensive (17%)
- Neutral/indifferent (11%)
- Don't recommend anyone/no-one to recommend to (7%)
- OK/fine (5%)
- No problems (4%)
- Inconsistent water supply (4%)
- Only interested in profit (4%)
- Poor water quality (3%)
- Problem not resolved (3%)
- Improvements needed with billing system (3%)
- Poor customer service (3%)
- Difficult to contact/passed around (3%)
- Nothing to compare against/no choice/had no real dealings with them (37%)



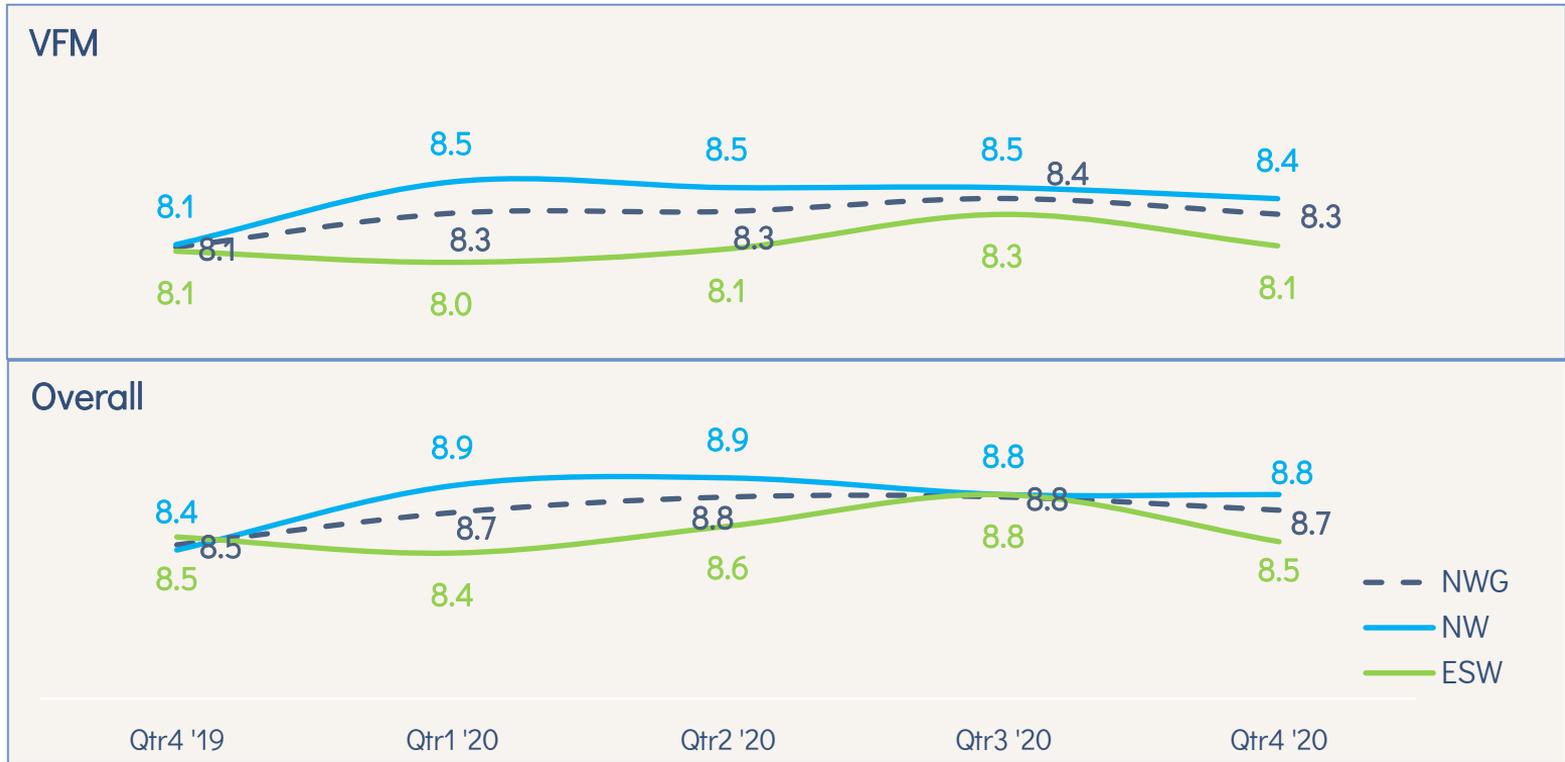
Top improvements to give a higher score

Non-Promoters (scores of 0-8) - 201 customers

- Lower prices (22%)
- Better quality water (7%)
- Improve billing procedures/less estimated bills (6%)
- Better communication/return calls (5%)
- Repair leaks quicker (3%)
- Quicker response (2%)
- Better water pressure (2%)
- Improve reliability of supply (2%)
- Easier to contact (2%)



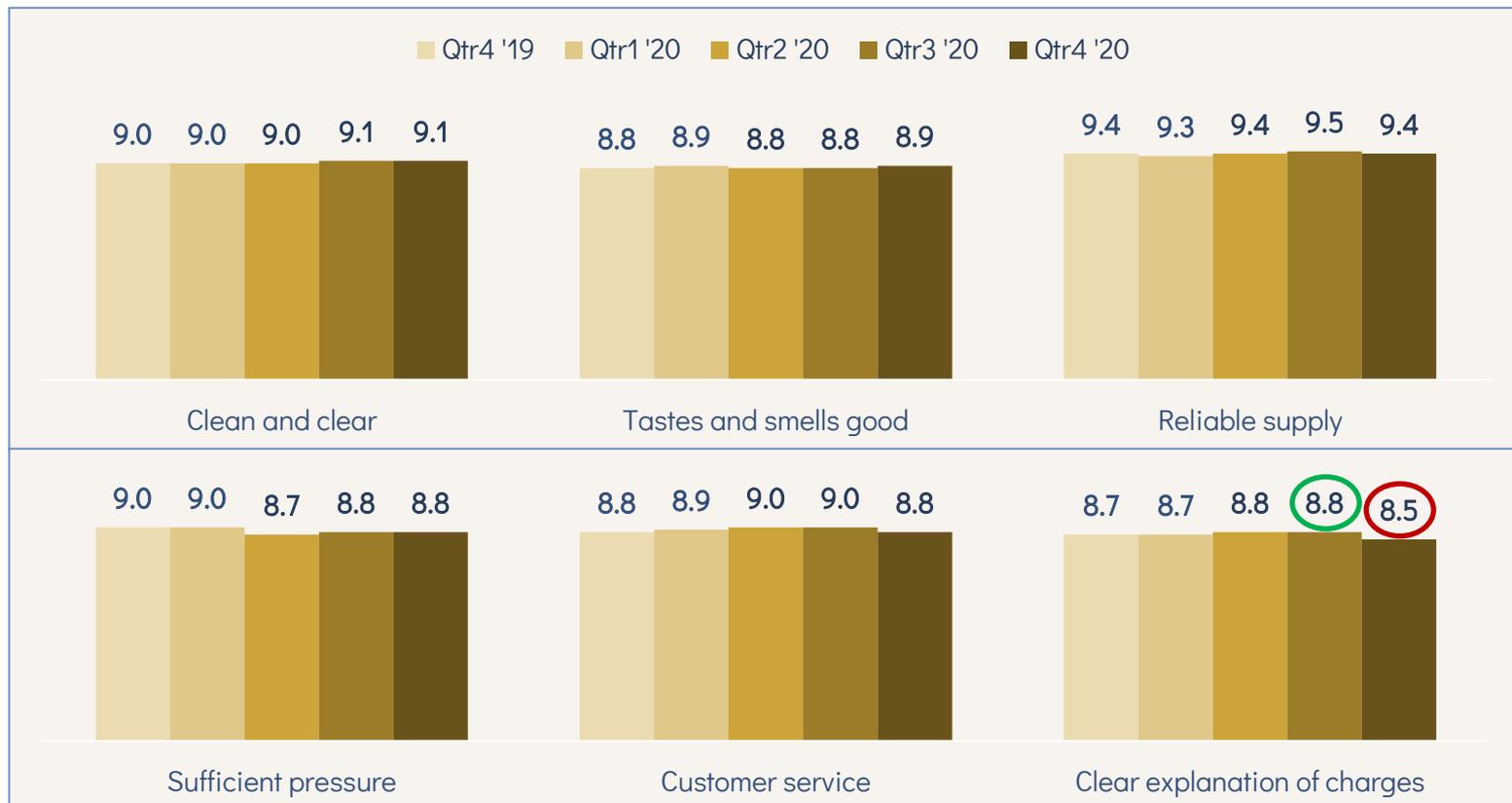
Overall satisfaction and with Value for Money, since this quarter last year



--- NWG
— NW
— ESW



Service satisfaction 1 (NWG)



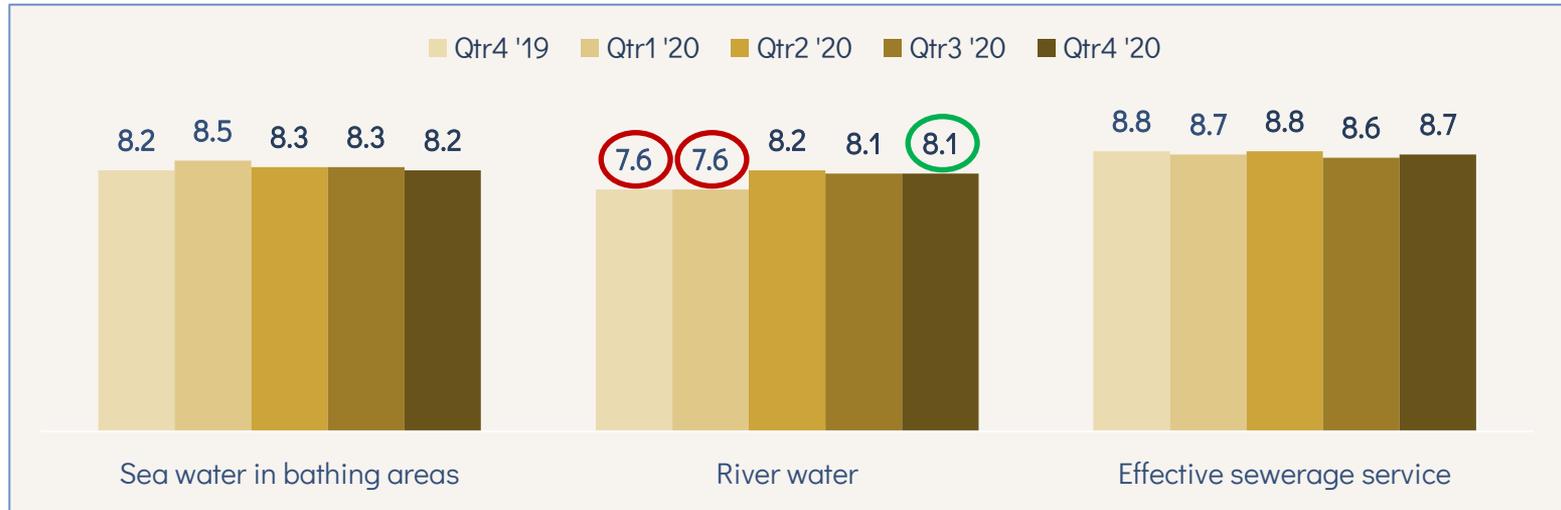
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Service satisfaction 1 (by region)

Clean and clear	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
NW	9.0	9.2	9.2	9.1	9.2
ESW	9.0	8.8	8.7	9.2	9.0
Tastes and smells good	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
NW	8.8	9.1	9.0	8.8	9.0
ESW	8.8	8.6	8.5	8.8	8.7
Reliable supply	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
NW	9.4	9.4	9.5	9.5	9.5
ESW	9.4	9.2	9.3	9.5	9.3
Sufficient pressure	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
NW	9.1	9.2	8.9	8.9	9.0
ESW	8.8	8.7	8.5	8.7	8.6
Customer service	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
NW	8.7	9.0	9.1	9.0	8.9
ESW	9.0	8.7	8.8	8.9	8.6
Clear explanation of charges	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
NW	8.7	8.8	8.8	8.8	8.7
ESW	8.7	8.6	8.7	8.7	8.3



Service satisfaction 2 (NW)





Top improvements required on service issues

Gave any low scores (0-6) - 148 customers

- Improve quality/taste of water (22%)
- Improve water pressure (17%)
- Cleaner rivers/beaches (14%)
- More detail/clarity on charges (11%)
- Better sewer/pipes maintenance (9%)
- No real dealings/don't know much about them (7%)
- Reduce prices (7%)
- No improvement needed (5%)
- Quicker resolution of problems (4%)
- More information on their services (3%)
- More accurate bills (3%)
- Better communication (3%)

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What the company does well



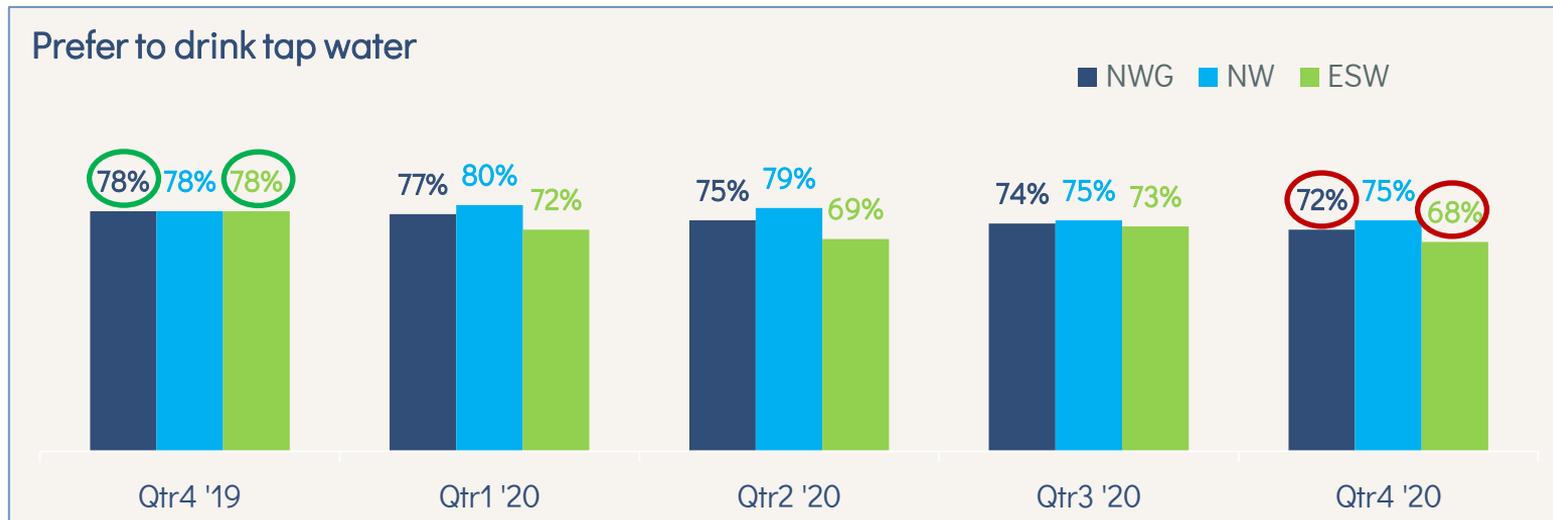
All respondents - 500 customers

- Reliable supply (38%)
- Good quality/tasting water (20%)
- Good service overall/never need to contact them (10%)
- Good customer service (10%)
- Never had a problem (8%)
- Notify customers of works (7%)
- Good communication (7%)
- Quick to resolve problems/leaks (6%)
- Timely/accurate/clear bills (6%)
- Quick to respond (4%)
- Everything (4%)
- Good water pressure (4%)
- Good/fair price (3%)



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

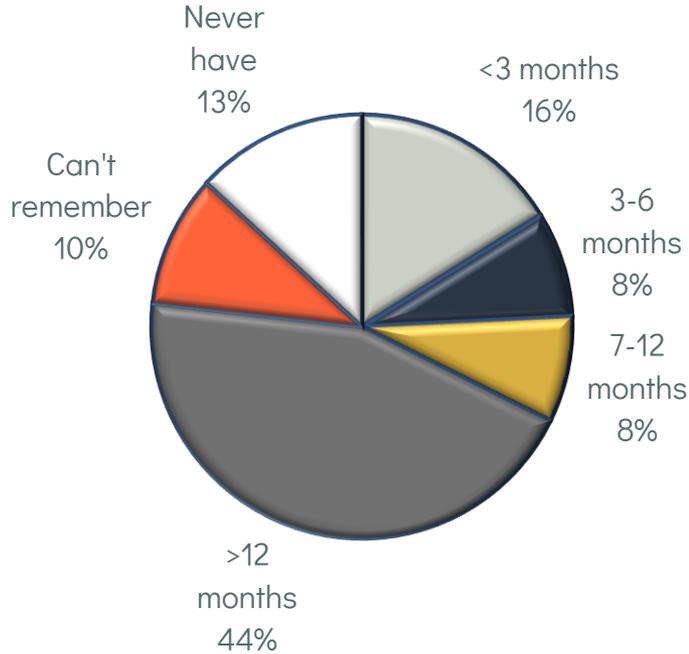
Tap water preference



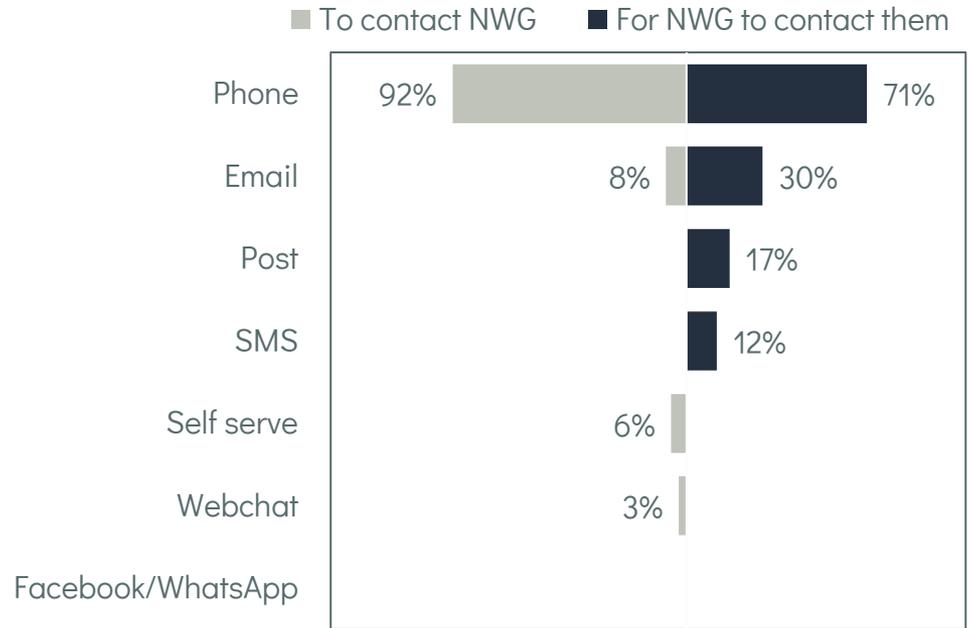


Contact

When last had contact with NWG

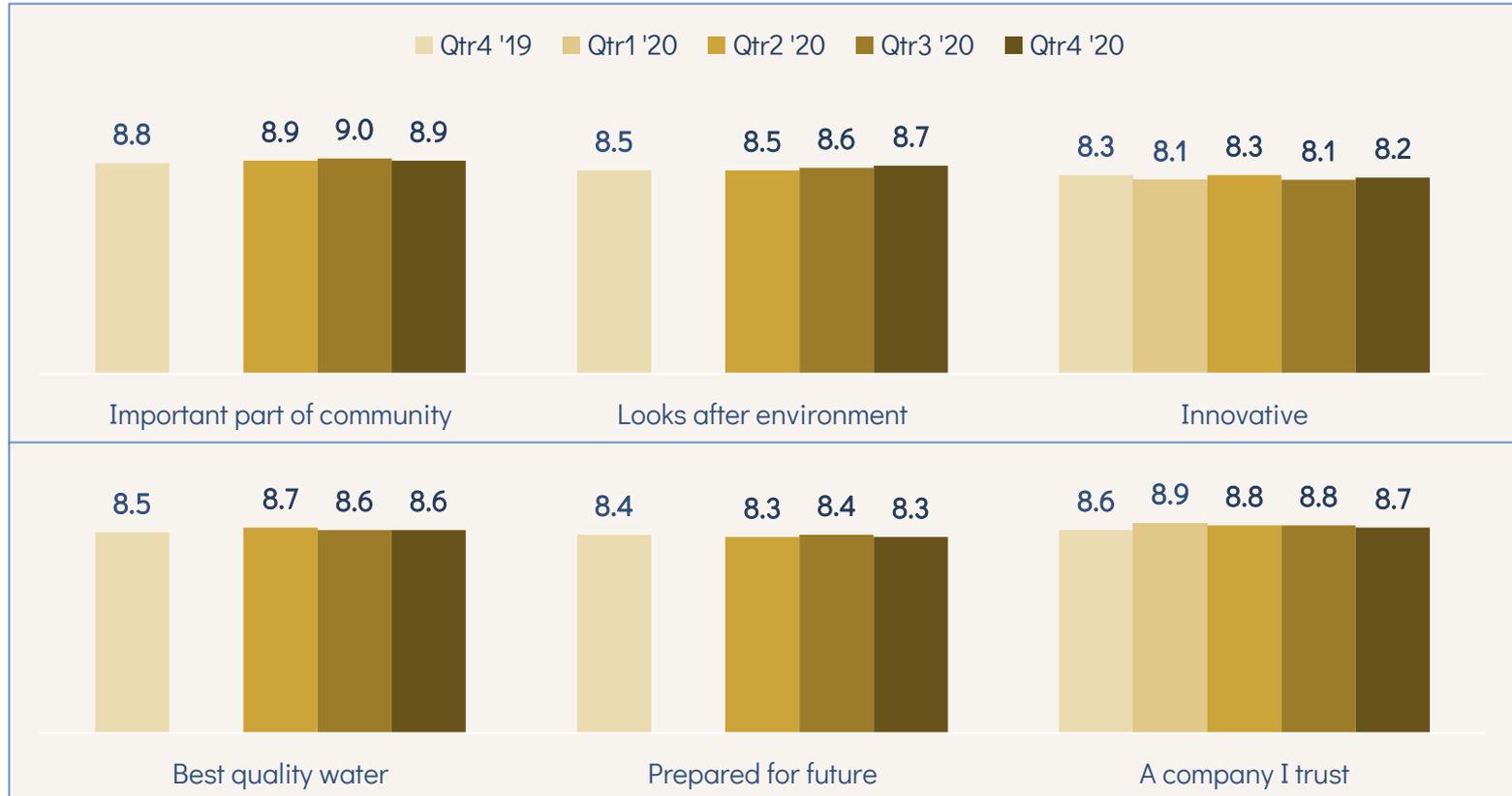


Preferred contact methods



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Brand values (NWG)



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Brand values (by region)

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

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Comments relating to trust score

All respondents - 500 customers

- Never had any problems – 24%
- No reason not to trust them – 14%
- Good quality water – 12%
- Reliable water supply – 12%
- No real dealings/no reason – 7%
- Deal with issues/problems – 7%
- Good customer service – 6%
- Good reputation/don't hear anything bad – 6%
- Been with them a long time – 6%
- No other option/monopoly – 6%
- Quick response to issues – 5%
- Good billing system – 5%
- Happy – 5%
- Reliable – 4%

If I contact them, I get good service. If something happened, we wouldn't know about it - the van would already be there sorting it out. They're silent and their vans are there. They're easy to get in contact with and listen and try to help, which a customer always wants.

I would hope if anything was untoward, they would be first to put their hands up. I've always had my water supply and never had any trouble. I dare say if I ever had to get in contact with them, they would be there.

They keep the rivers and environment clear, they're the cleanest they've ever been. Regarding my bills, I've never had any issues, so yes, I trust them.

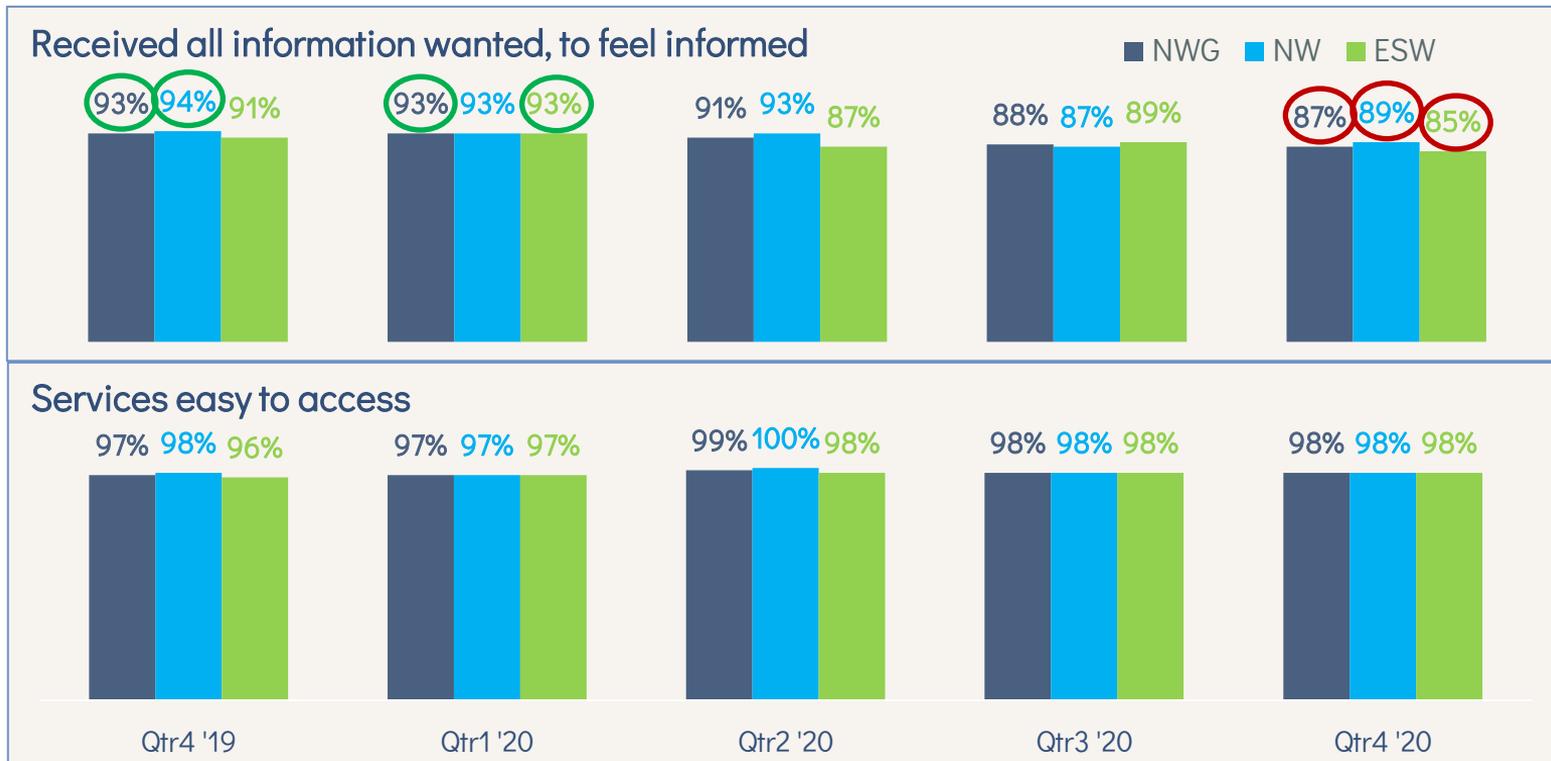
I trust them to supply good quality water consistently. I don't trust them to do the right thing for their environment if it doesn't align with the company's politics.

Everything seems transparent. I have got all the information from the website. The bills and payment seem ok. I don't get extra charges out of the blue and loads of people are using the company.



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

Information and service access



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

Not that easy - need to have log-ins, etc, to talk to someone. Account number this and that.

The telephone contact to get through took forever. Once you get through, it's fine.

I've been on the website to look for frequently asked questions, but there's nothing like that. You call the normal number and it just rings and rings and rings.

Because they only have a phone.

Quite hard to get hold of them when I tried.

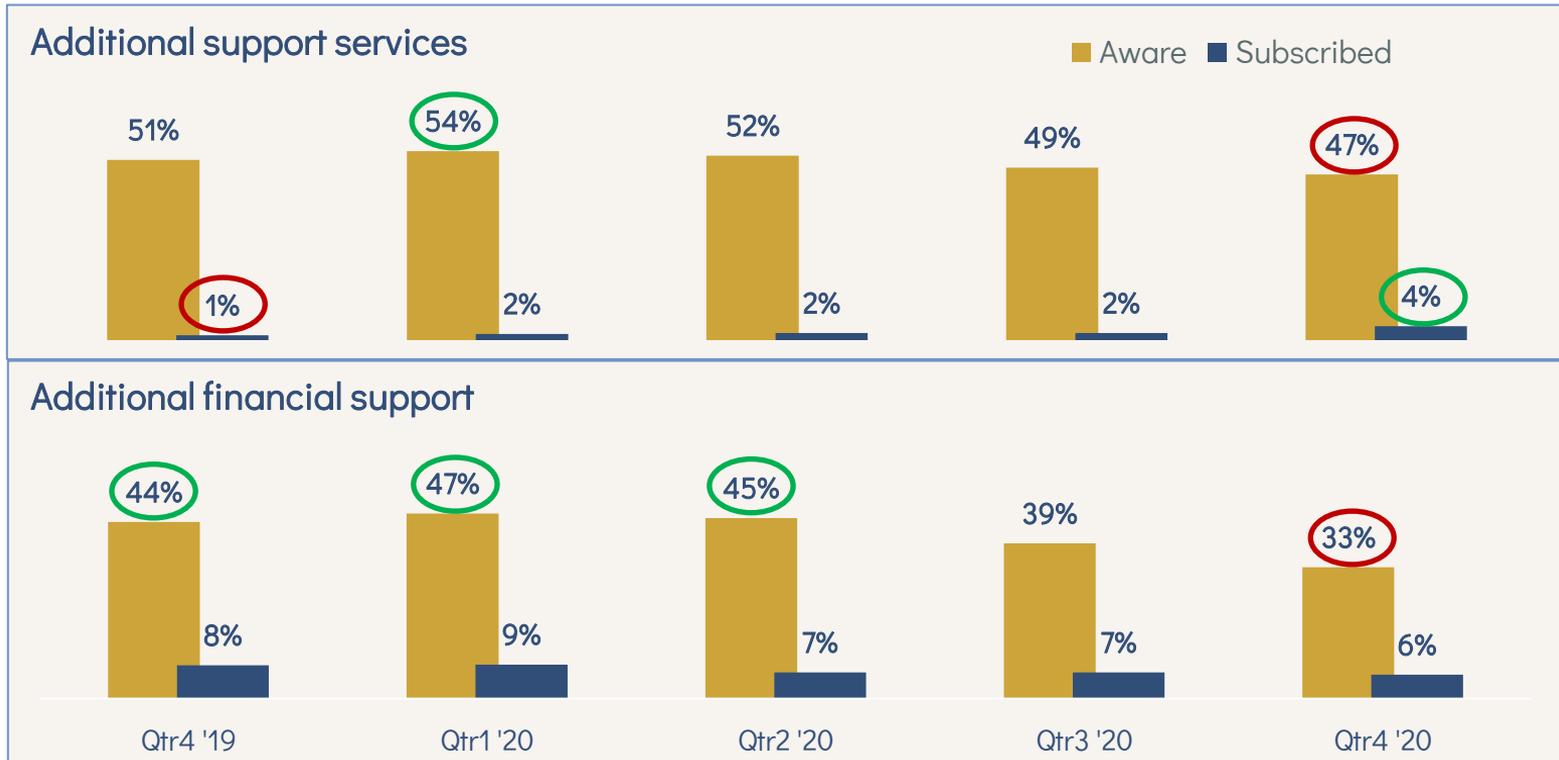
Not for older people. Most older people are not too good on computers. It's too advanced. No freephone numbers. You don't talk to anyone. That's not customer service. It's all 'choose 1, 2, 3...' or 'wait in a line' - it's pathetic.

Have never tried to get in touch.

There's so many boxes, you don't know what to press and tick. It's technology on the up and up and leaving me behind. I'm 77 years old.

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Priority services (NWG)



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Priority services (by region)

NW	Additional support services	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
	Aware	55%	56%	53%	47%	50%
	Subscribed	1%	1%	2%	1%	3%
	Additional financial support	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
	Aware	46%	51%	45%	38%	32%
	Subscribed	9%	10%	6%	8%	4%

ESW	Additional support services	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
	Aware	46%	51%	52%	52%	43%
	Subscribed	3%	3%	2%	3%	4%
	Additional financial support	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20
	Aware	43%	39%	47%	40%	36%
	Subscribed	7%	7%	8%	6%	10%

HEADLINES

NPS this quarter – 42.3

Overall satisfaction 8.7
and satisfaction with
value for money 8.3

Trust this quarter – 8.7

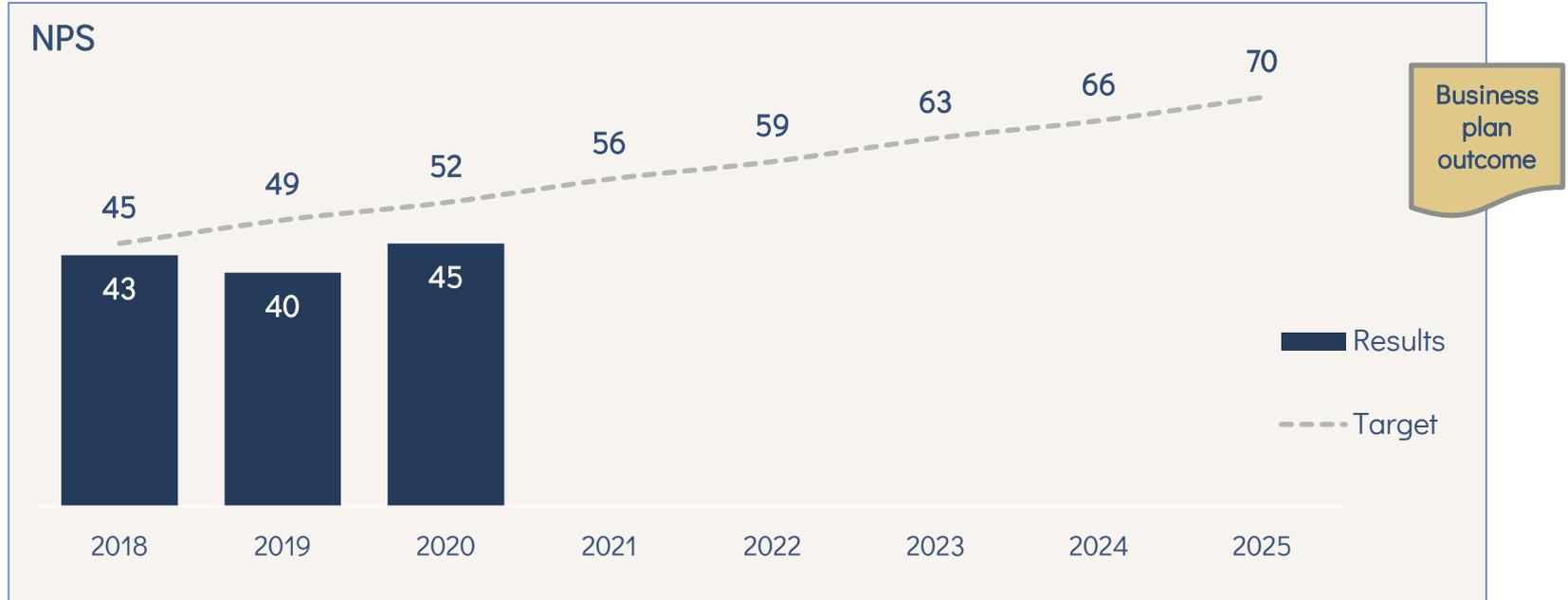
Overall, awareness of
additional financial and
non-financial support,
and having received all
information wanted, have
dropped this quarter

The clear explanation of
charges score has
decreased significantly
since Qtr3 '20 (from 8.8 to
8.5, driven by ESW), but
river water is now better
than the same period last
year

Scores for important part
of the community and a
company I trust have both
fallen significantly for
ESW since last quarter

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Progress towards targets, 1



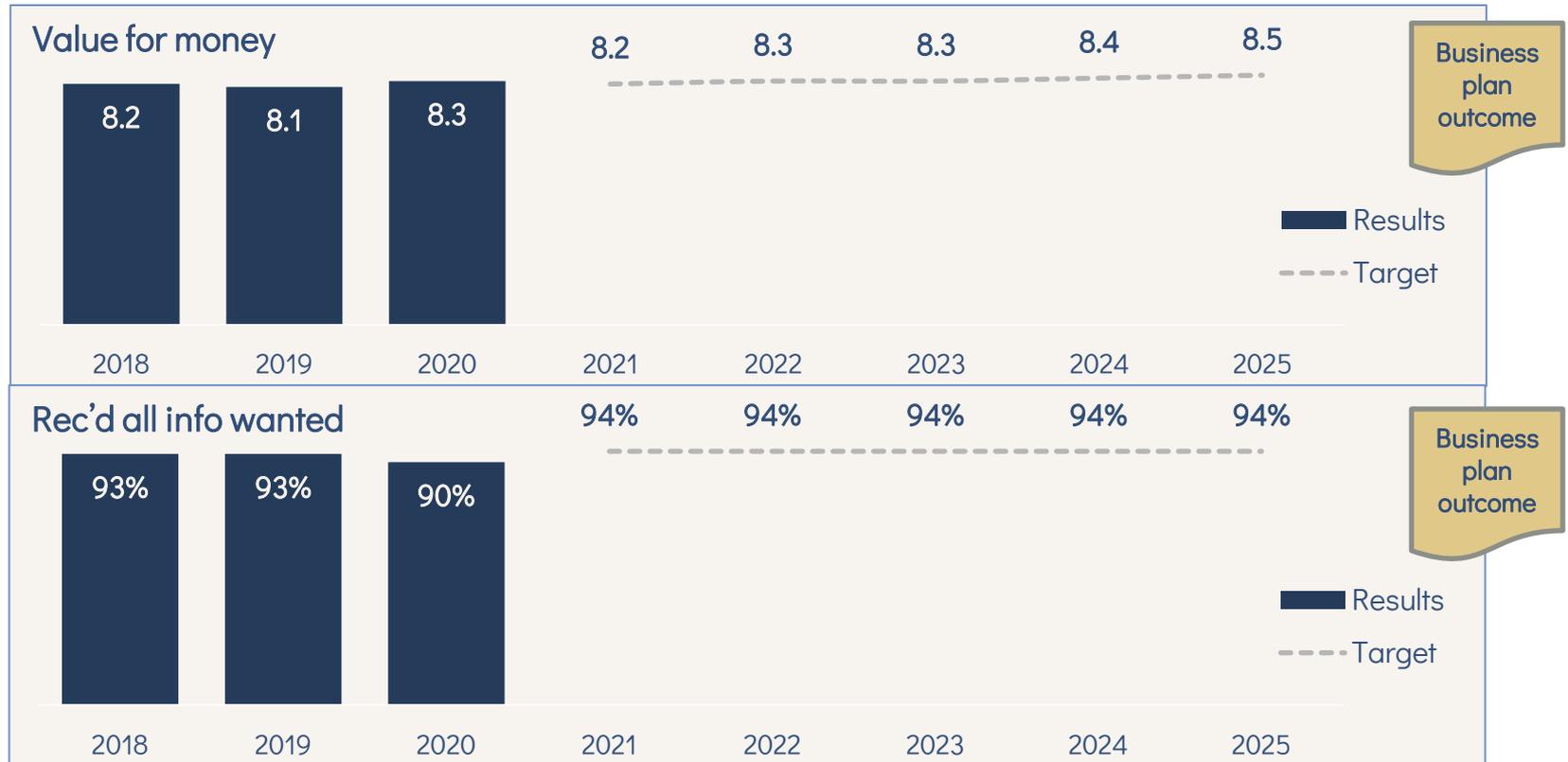
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Progress towards targets, 2



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Progress towards targets, 3



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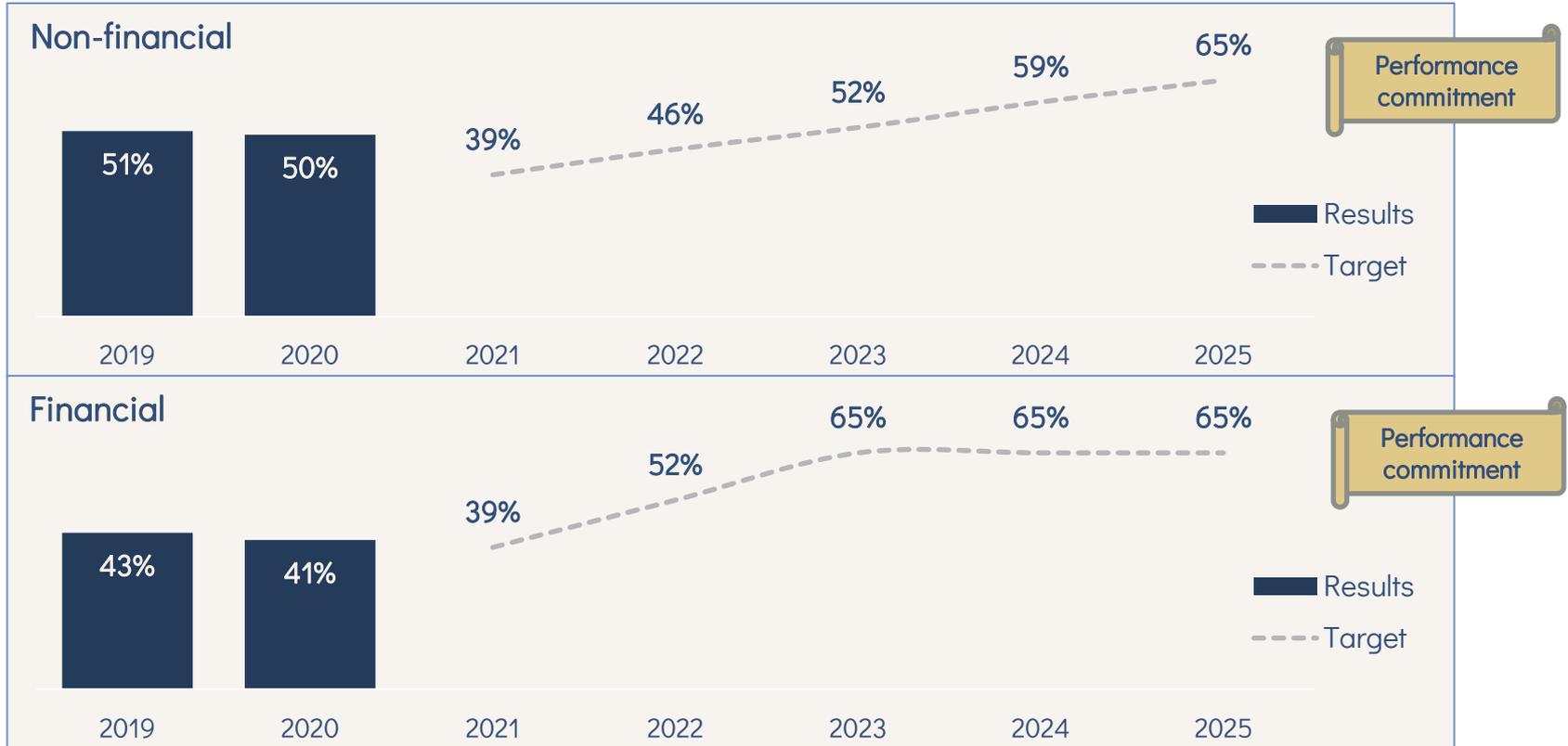
Progress towards targets, 4





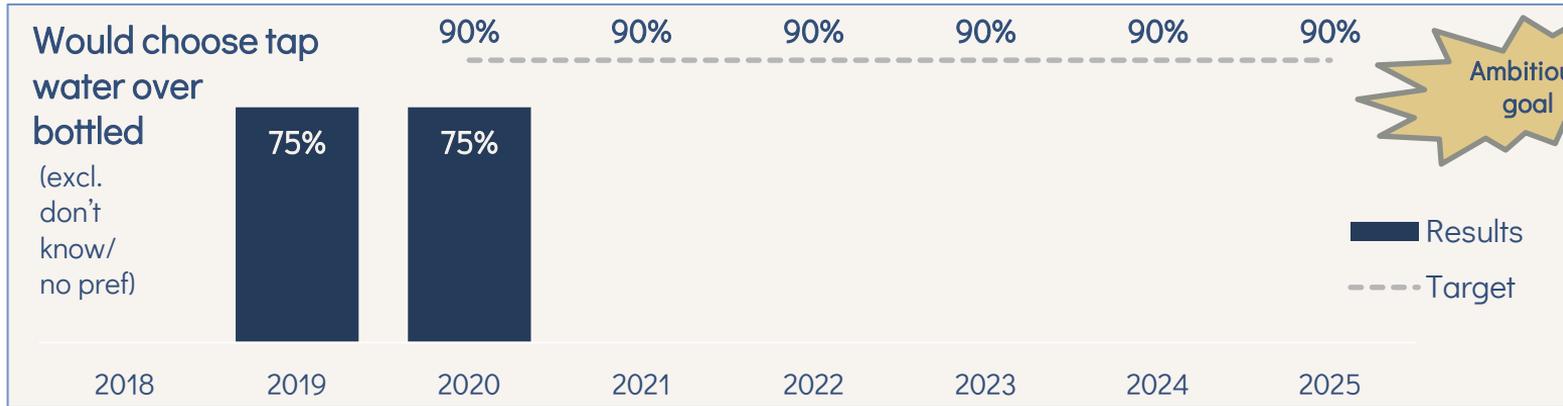
Progress towards targets, 5

Awareness of additional support





Progress towards targets, 6





DEFINING THE **CLEAREST** DIRECTION

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THANK YOU

NWG
living water

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

