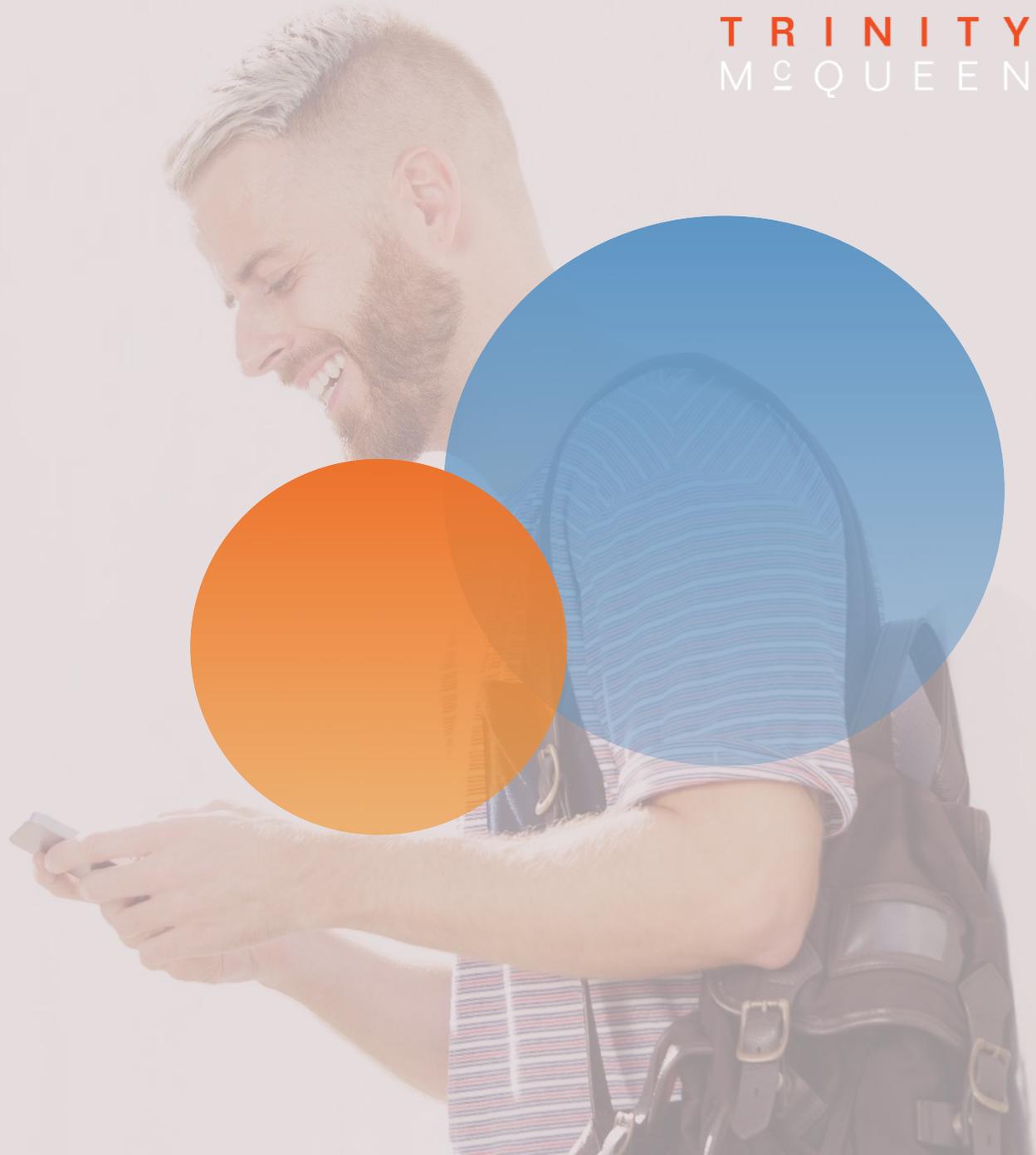


# Q4 Domestic Tracker

NWG  
26/11/21

# Contents

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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: 14<sup>th</sup> October – 9<sup>th</sup> November 2021

Average interview length: 15 min

Location	Interviews
North	316
Essex	184
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

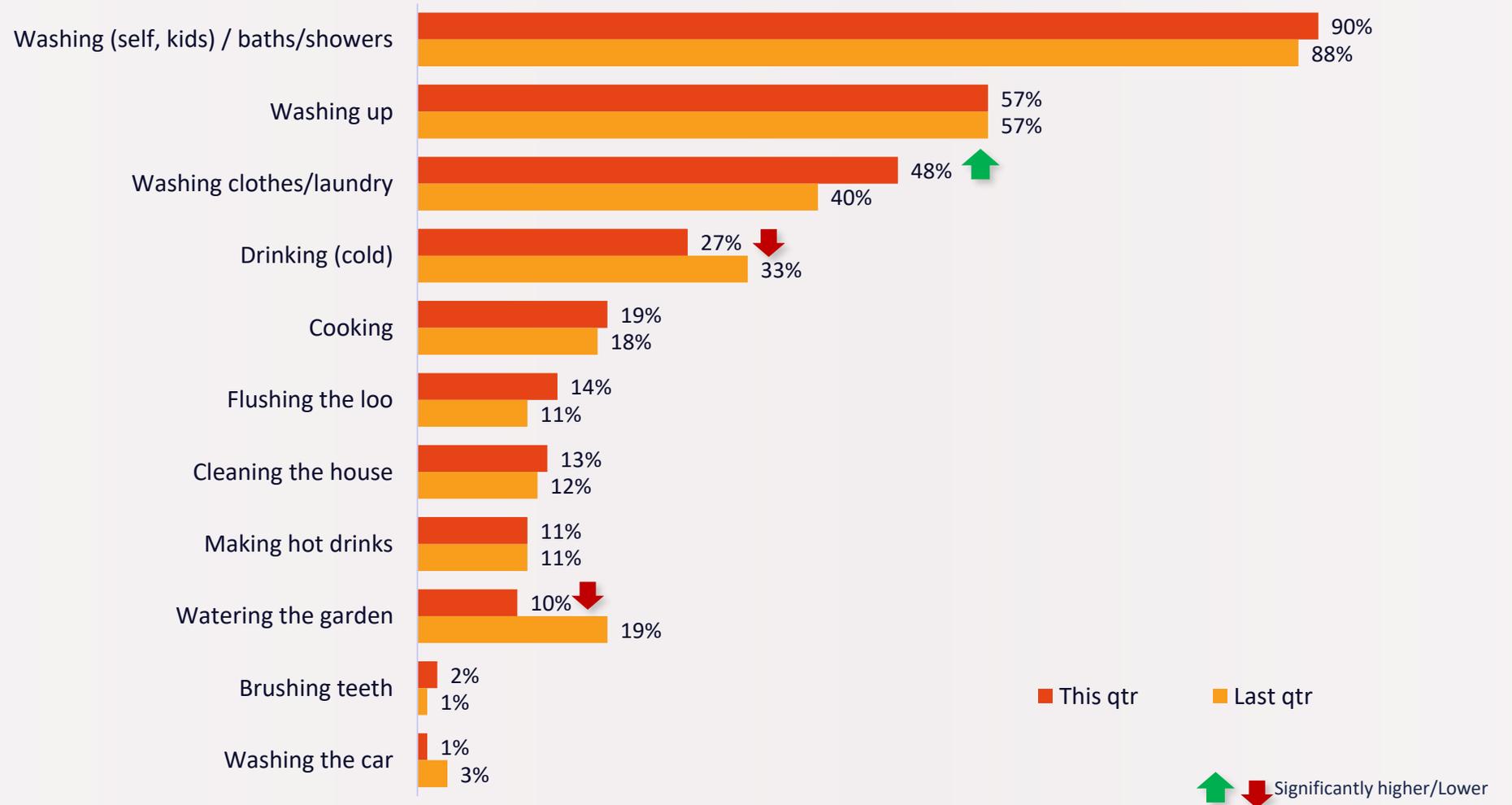
NPS



**NWVG**  
*living water*

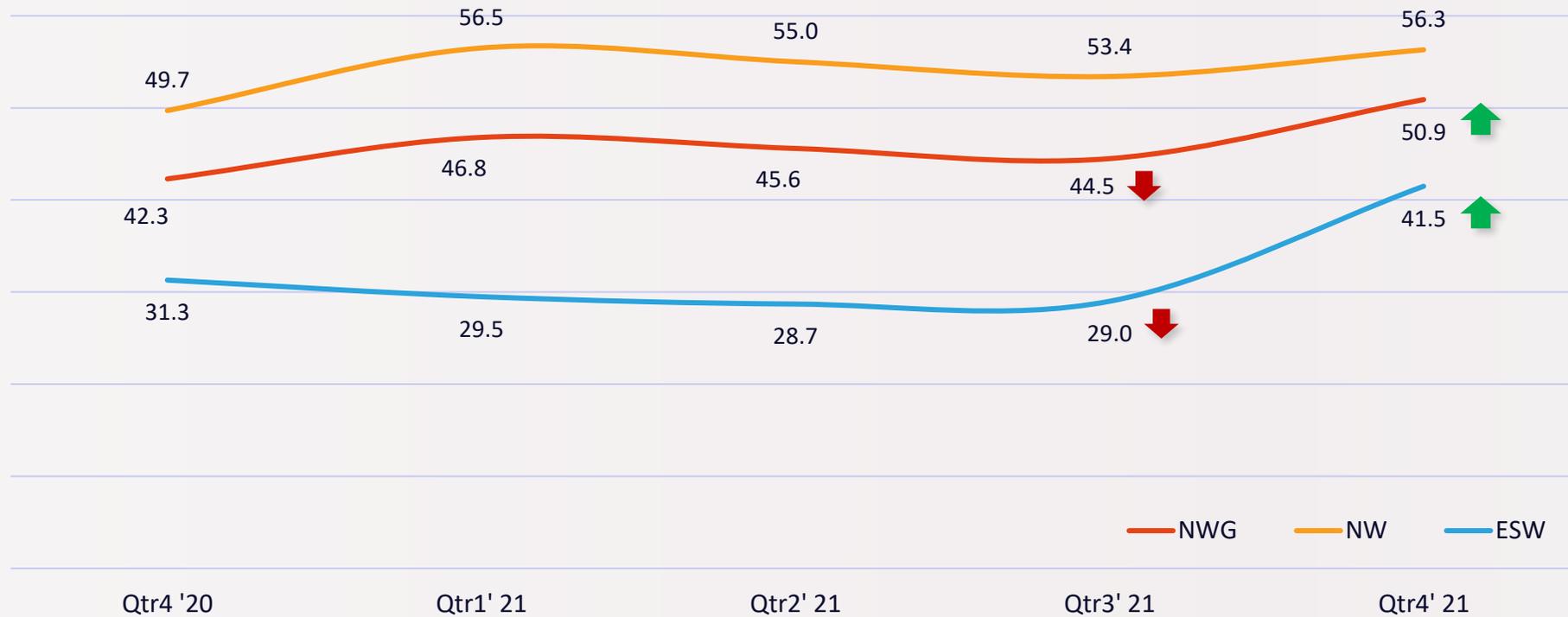
**T R I N I T Y**  
M C Q U E E N

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



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 (500)

# NPS since this quarter last year



  Significantly higher/Lower

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 (316), ESW (184)

# Top reasons for NPS scores this wave

## Promoters (scores of 9-10) - 295 customers

- No problems (62%)
- Good customer service (14%)
- No supply problems (12%)
- Been with them for years (9%)
- Good experience/happy with them (8%)
- Informed of/alerted to issues (7%)
- Good value/fair price (7%)
- Helpful (6%)
- Quick response/resolution (6%)
- Good company/do a good job (6%)
- Good water quality (6%)
- Good communication/updates (5%)
- Good billing system (4%)
- Reliable/trustworthy (4%)
- Efficient (3%)
- Responsive to issues (3%)
- Handled well always deal with issues (3%)
- Easy to contact (2%)
- Informative/answer questions (2%)

## Passives (scores of 7-8) – 113 customers

- No problems (53%)
- Good customer service (6%)
- Helpful (6%)
- No supply problems (6%)
- Informed of/alerted to issues (6%)
- Been with them for years (5%)
- Good experience/happy with them (5%)
- Expensive (5%)
- Poor water quality (5%)
- OK/fine/satisfied (4%)
- Good communication/updates (4%)
- Good company/do a good job (4%)
- Handled well/always deal with issues (3%)
- Poor experience with them (3%)
- Nothing to compare against/no choice/had no real dealings with them (23%)

## Detractors (scores of 0-6) – 58 customers

- Neutral/indifferent (14%)
- Expensive (10%)
- Poor water quality (9%)
- Poor experience with them (9%)
- No supply problems (7%)
- No problems (7%)
- Lots of leaks/not maintaining pipes/sewers (5%)
- Don't recommend (5%)
- OK/fine/satisfied (5%)
- Prefer one bill for both services (3%)
- Don't take responsibility (3%)
- Nothing to compare against/no choice/had no real dealings with them (41%)

# Top improvements to give a higher score

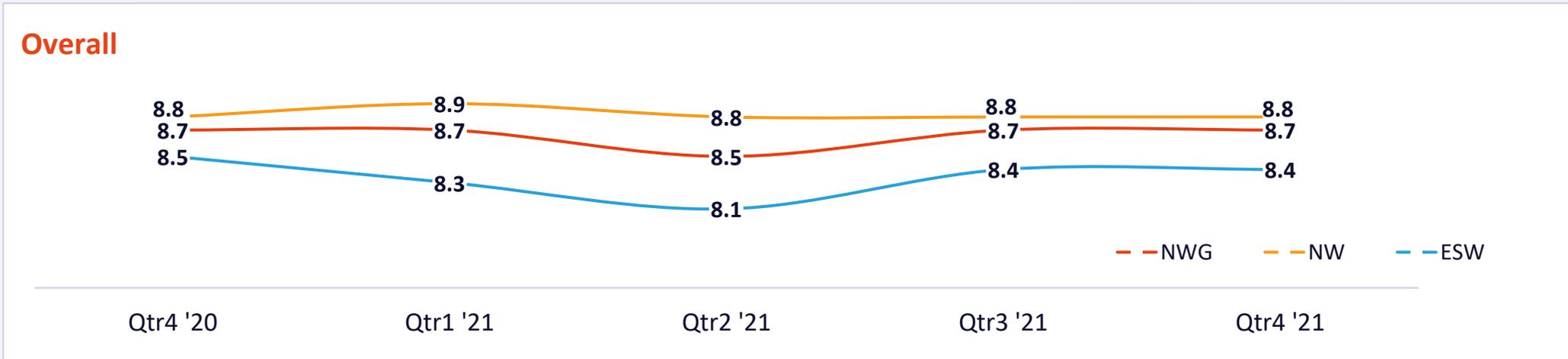
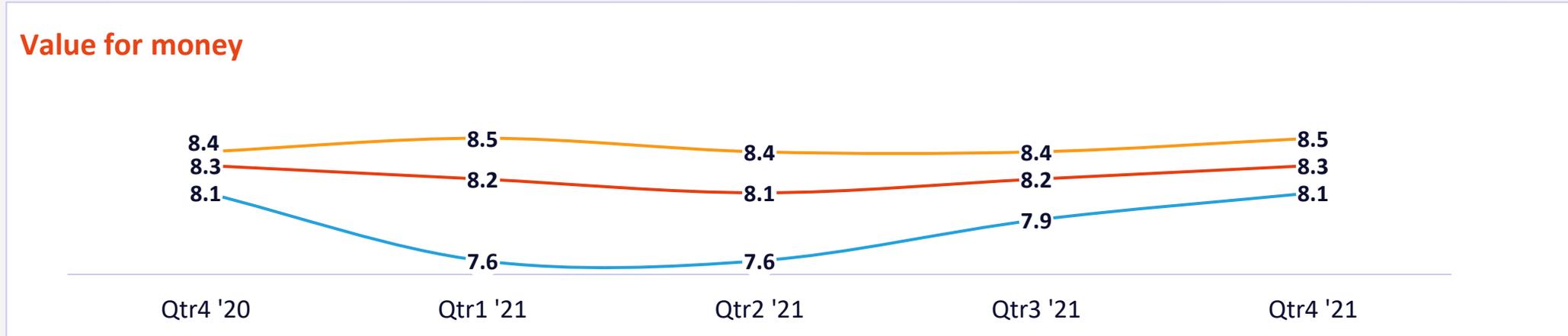
Non-Promoters (scores of 0-8) -171 customers

- Any improvement mentioned (56%)
- Reduce cost (22%)
- Improve water quality/taste/smell (9%)
- Improve water pressure (3%)
- Better ongoing maintenance of sewers/pipes (3%)
- Clearer/transparency/information on pricing structures (3%)
- One bill for water/sewerage (2%)
- Easier to understand bills (2%)
- More accurate bills/fewer estimated bills (1%)
- More environmentally friendly (1%)
- Easier to contact (1%)



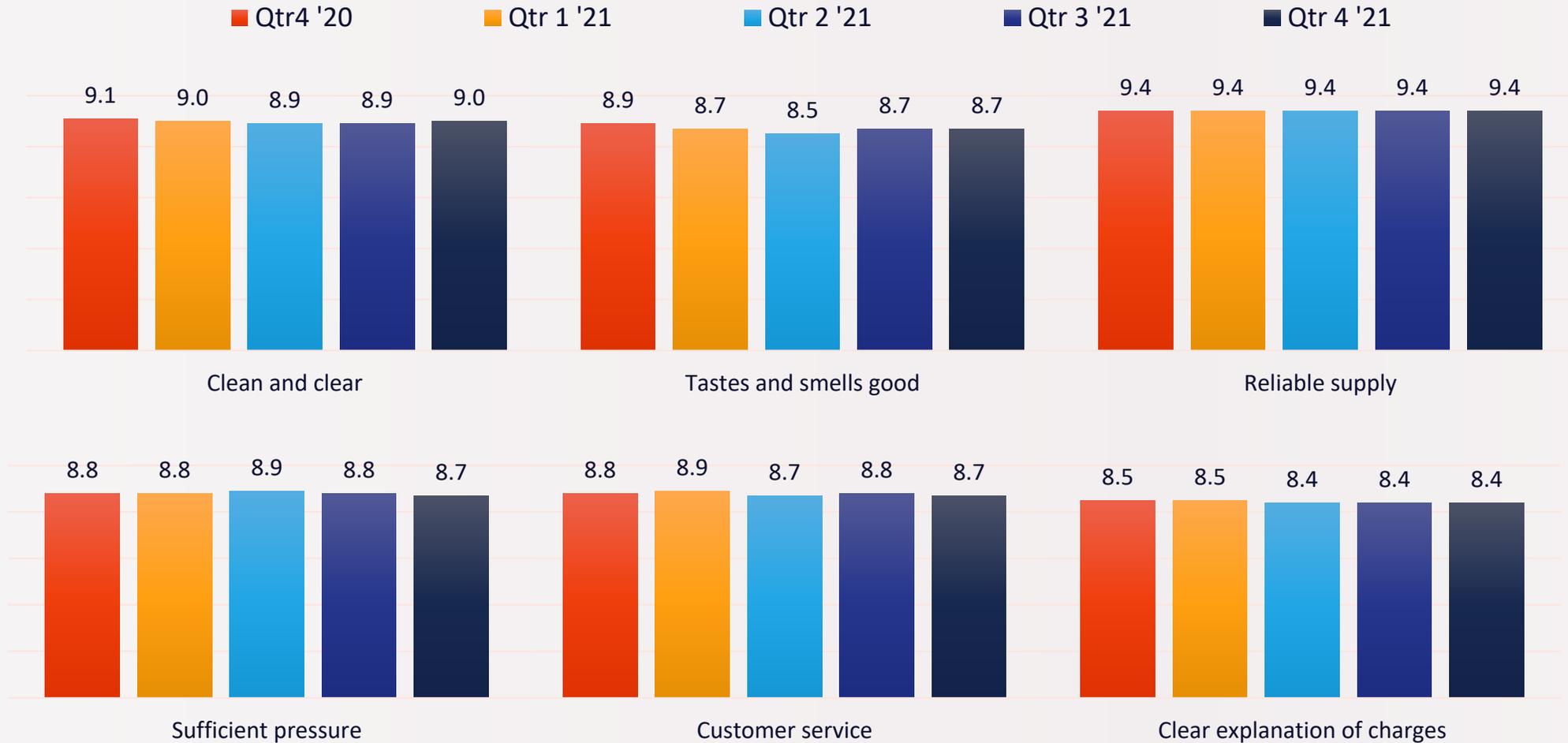
# Overall Satisfaction

# 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(316) ESW (184)

# Service satisfaction 1 (NWG)



↑ ↓ Significantly higher/Lower

# Service satisfaction 1 (by region)

Clean and clear	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	9.2	9.1	9.1	9.1	9.2
ESW	9.0	8.7	8.6	8.7	8.8
Tastes and smells good	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	9.0	8.8	8.7	8.8	8.8
ESW	8.7	8.6	8.1	8.4	8.4
Reliable supply	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	9.5	9.5	9.4	9.4	9.5
ESW	9.3	9.2	9.2	9.3	9.3

  Significantly higher/Lower

**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(316) ESW (184)

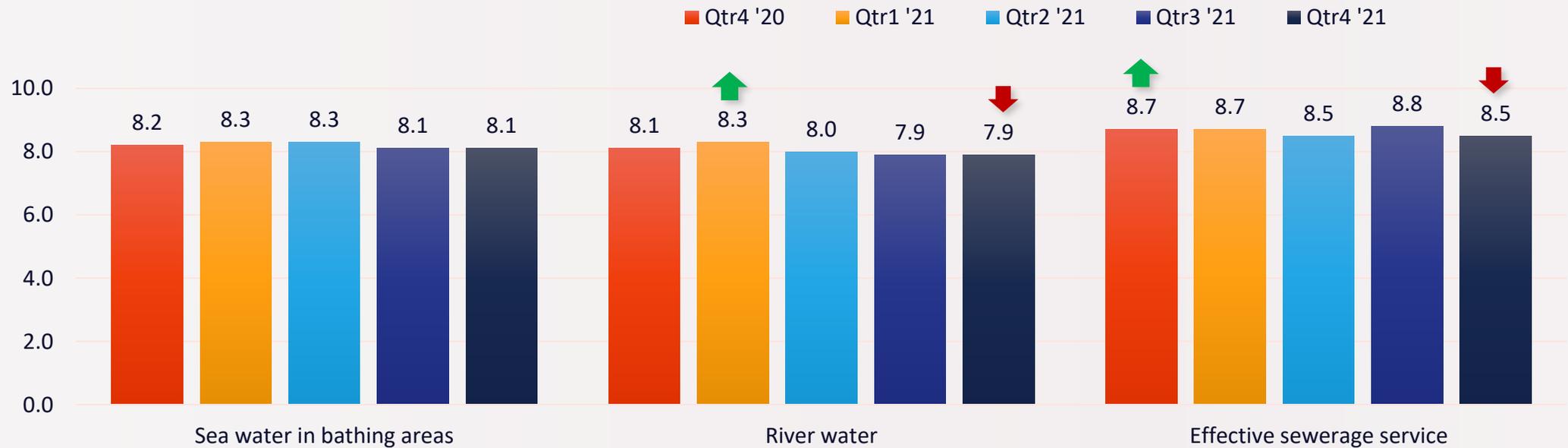
# Service satisfaction 1 (by region)

Sufficient pressure	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	9.0	8.9	9.0	8.9	8.9
ESW	8.6	8.5	8.6	8.6	8.4
Customer service	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	8.9	9.1	8.9	8.9	8.7
ESW	8.6	8.4	8.2	8.7	8.7
Clear explanation of charges	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	8.7	8.8	8.6	8.6	8.5
ESW	8.3	8.1	8.0	8.2	8.3

  Significantly higher/Lower

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(316) ESW (184)

# Service satisfaction 2 (NW)



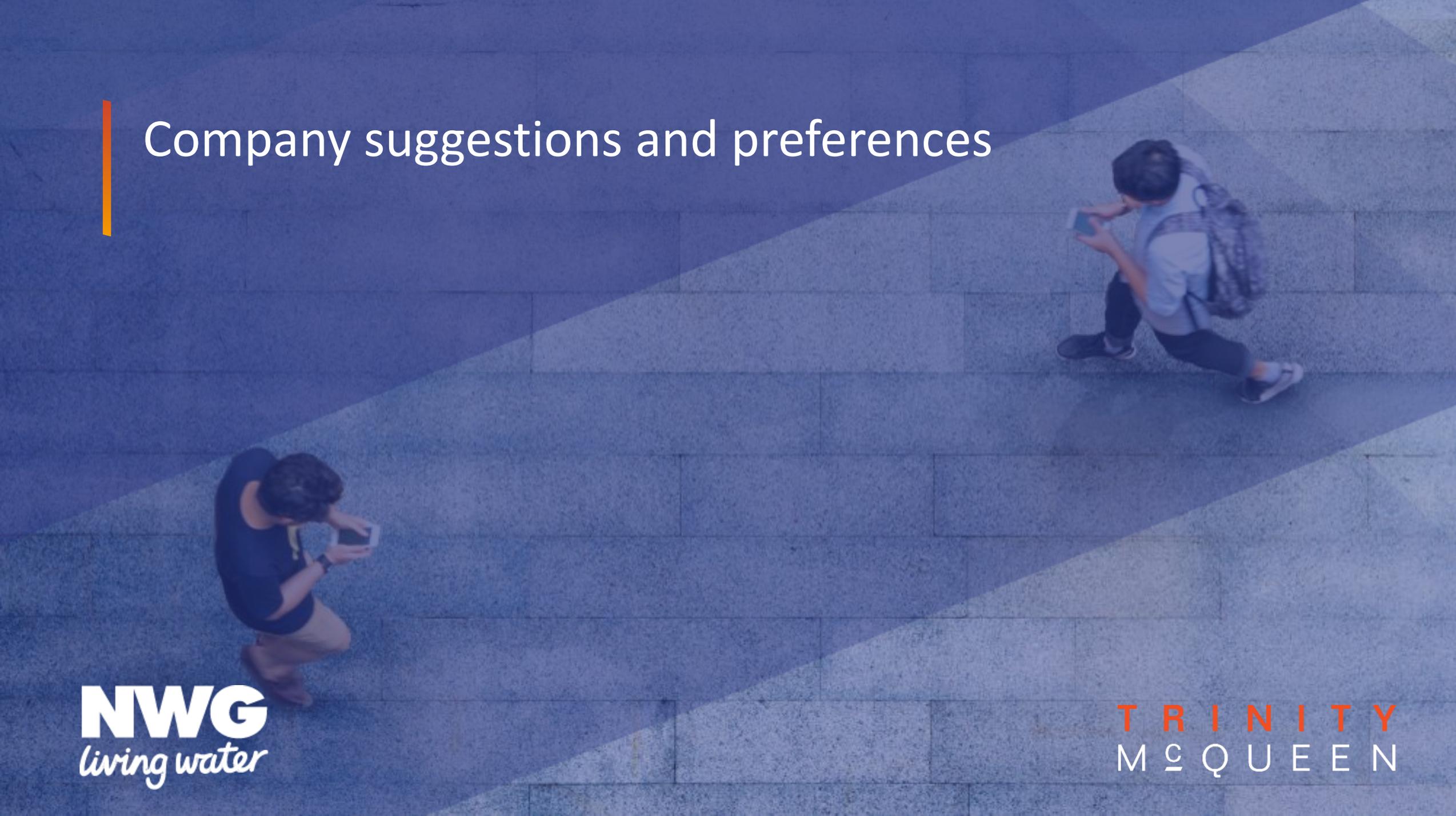
Significantly higher/Lower

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 (316)

# Top improvements required on service issues

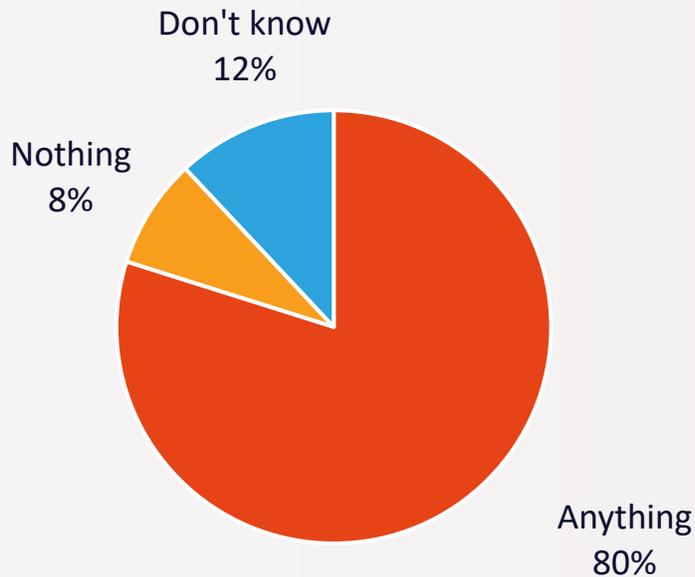
Gave any low scores (0-6) - 167 customers

- Any improvements mentioned (78%)
- Improve quality/taste/smell of water (22%)
- Improve water pressure (14%)
- Better ongoing sewer/pipes maintenance (11%)
- More detail/clarity on charges (10%)
- Cleaner rivers (8%)
- Replace old infrastructure/improve capacity (6%)
- Reduce prices (4%)
- Transparency- bills/water quality (4%)
- More accurate bills/read meters more often (2%)
- Quicker resolution of issues/problems (2%)
- Easier to contact (2%)



# Company suggestions and preferences

# What the company does well



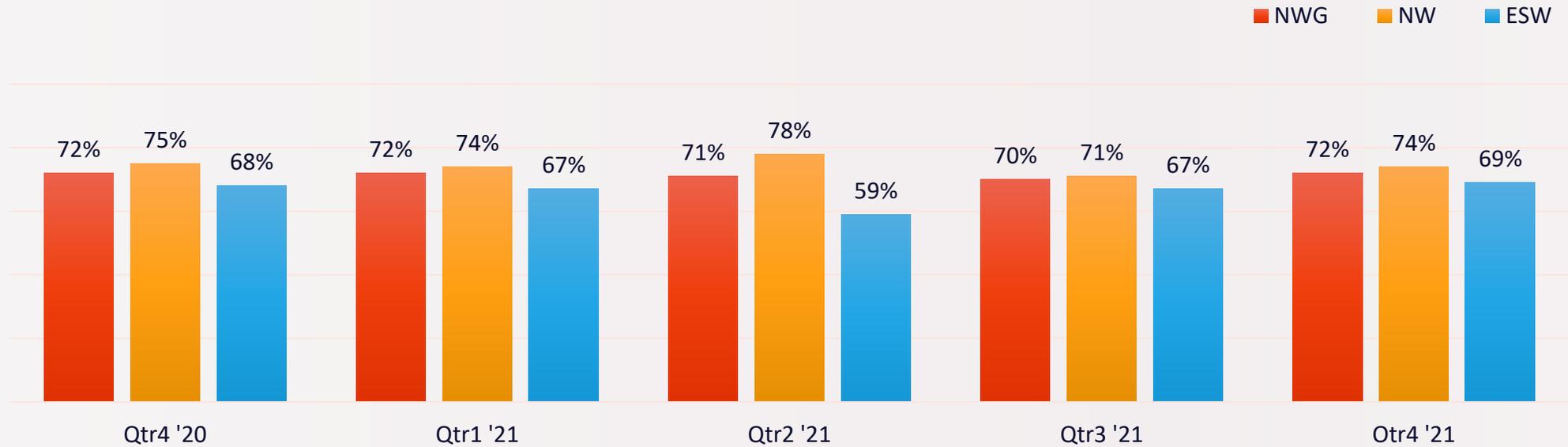
## All respondents - 500 customers

- Reliable supply of water (36%)
- Good quality water/tastes/smells good (13%)
- Respond quickly to issues/problems (9%)
- Never had any problem/never need to contact them (8%)
- Helpful/friendly/professional call centre staff (7%)
- Good customer service (7%)
- Keep customers informed of progress on issues raised (6%)
- Notify customers if there are going to be works (4%)
- Easy to contact (3%)
- Repair leaks quickly (3%)
- Timely/accurate bills (2%)
- Fair prices (2%)
- Good frequent communication (2%)

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

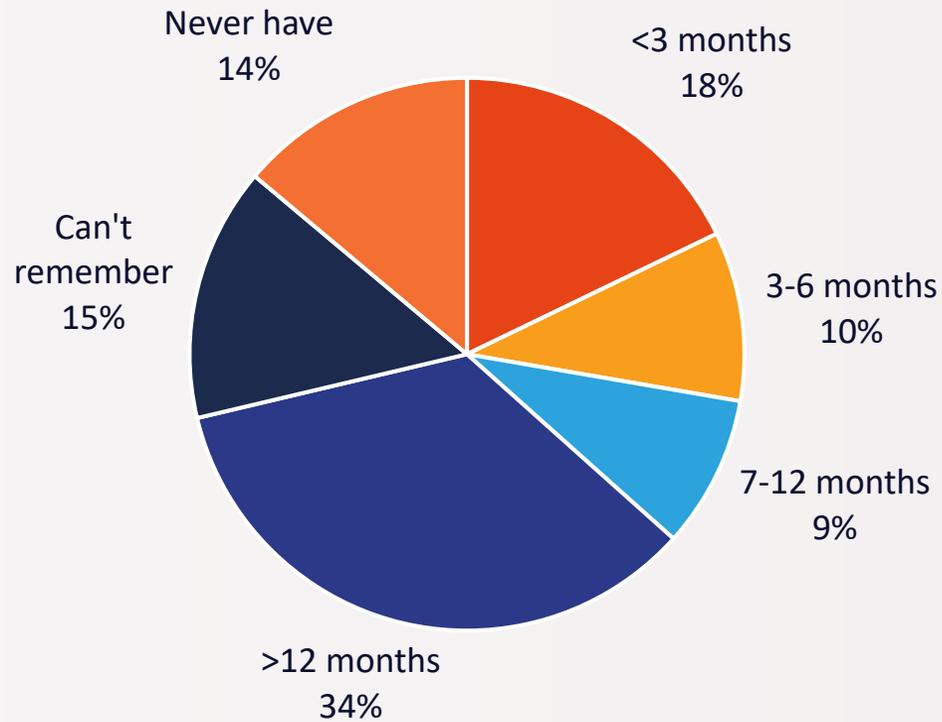
# Tap water preference

## Prefer to drink tap water

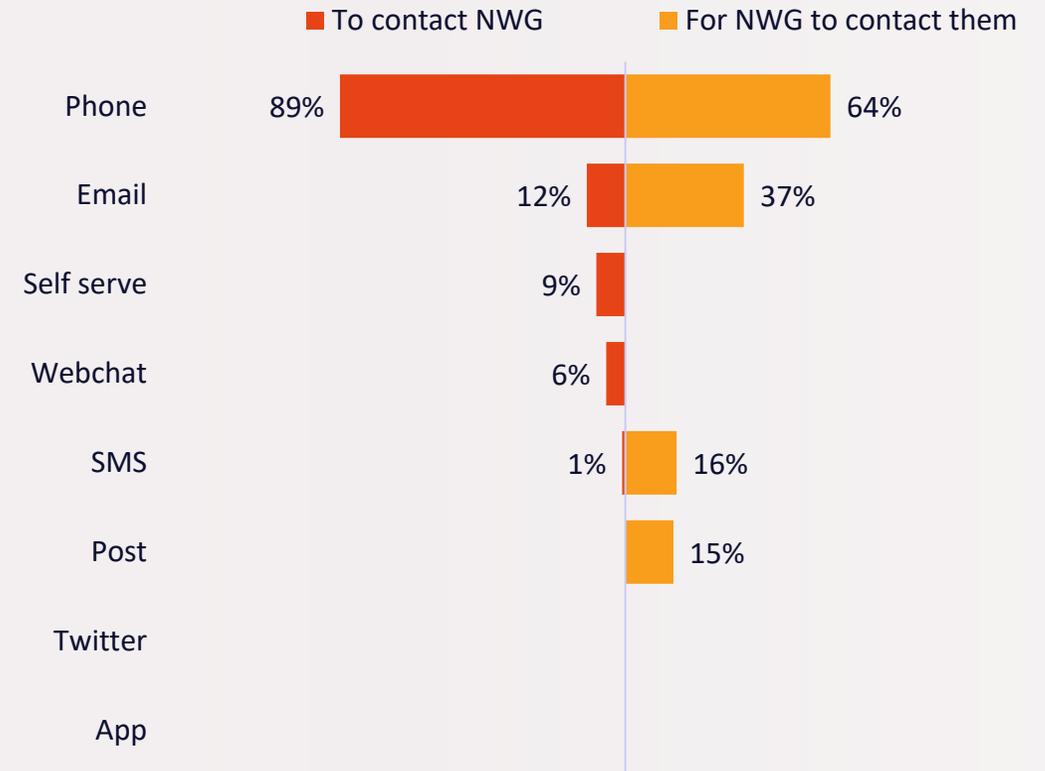


# Contact

### When last had contact with NWG



### Preferred contact methods





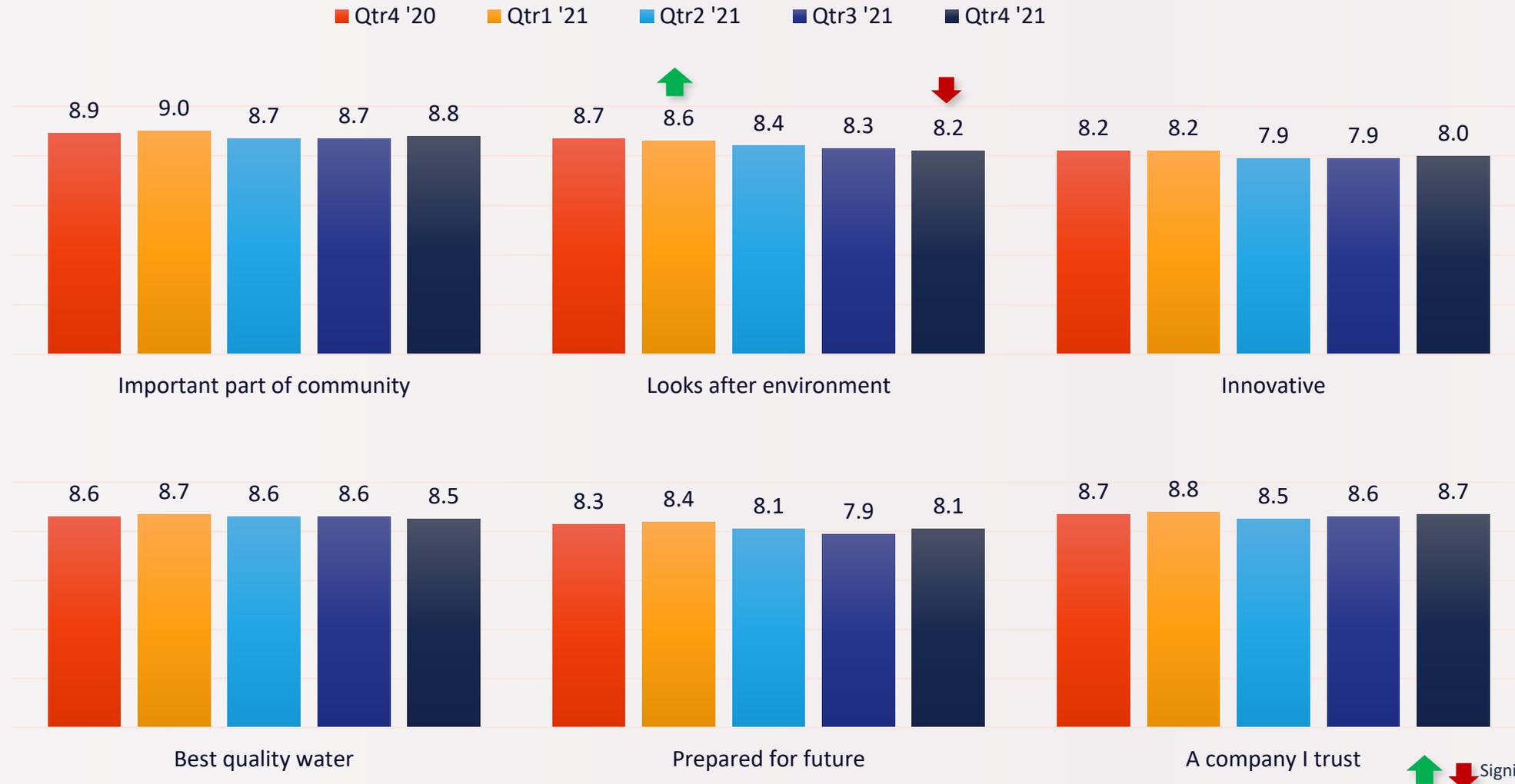
# Brand values



**NWVG**  
*living water*

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

# Brand values (NWG)



↑
↓
 Significantly higher/Lower

**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 (500)

# Brand values (by region)

Important part of community	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	9.1	9.1	8.9	8.8	9.0
ESW	8.6	8.9	8.4	8.5	8.6
Looks after environment	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	8.8	8.7	8.6	8.5	8.3
ESW	8.4	8.4	7.9	7.8	8.1
Innovative	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
NW	8.3	8.5	8.2	8.1	7.9
ESW	8.0	7.6 	7.5	7.6	8.0 

  Significantly higher/Lower

## Brand values (by region)

<b>Best quality water</b>	<b>Qtr4 '20</b>	<b>Qtr1 '21</b>	<b>Qtr2 '21</b>	<b>Qtr3 '21</b>	<b>Qtr4 '21</b>
NW	8.9	8.9	8.9	8.8	8.7
ESW	8.2	8.2	7.9	8.3	8.2
<b>Prepared for future</b>	<b>Qtr4 '20</b>	<b>Qtr1 '21</b>	<b>Qtr2 '21</b>	<b>Qtr3 '21</b>	<b>Qtr4 '21</b>
NW	8.5	8.6	8.4	8.1	8.2
ESW	8.1	8.1	7.6	7.6	7.9
<b>A company I trust</b>	<b>Qtr4 '20</b>	<b>Qtr1 '21</b>	<b>Qtr2 '21</b>	<b>Qtr3 '21</b>	<b>Qtr4 '21</b>
NW	8.9	9.0	8.8	8.7	8.8
ESW	8.5	8.3	8.0	8.4	8.6

# Comments relating to trust score

## All respondents - 500 customers

- Never had any problems – 29%
- Reliable water supply – 14%
- No reason not to trust them – 13%
- Happy with them – 10%
- Good customer service – 9%
- Reliable/trustworthy – 9%
- Good quality water – 9%
- Never heard anything bad about them – 6%
- Been with them a long time – 6%
- Deal with issues/problems – 5%
- Quick response/resolution – 5%
- Good communication – 4%
- Notify customers of any work – 4%
  
- Do not know enough about them – 13%
- No other option/monopoly – 3%

They are just there and if I rang they would deal with the problem so there's no reason not to trust them.

Just feel I can trust them, I've been in property 18 months, always had low water pressure, had leak, guy had put hose pipe under floor and he must have turned water pressure so it doesn't leak. They sorted it out and very helpful in that respect. They are always polite and very helpful very lucky we live in soft water area.

I think it's the one with the best reputation.

They are easy to work with. They got back to me straight away when I contacted them and there was no hanging about and they resolved it in no time. They always send an annual letter asking if my circumstances have changed and if not I don't need to do anything. They trust me and I trust them.

Never found any fault with them, always been upfront with everything.

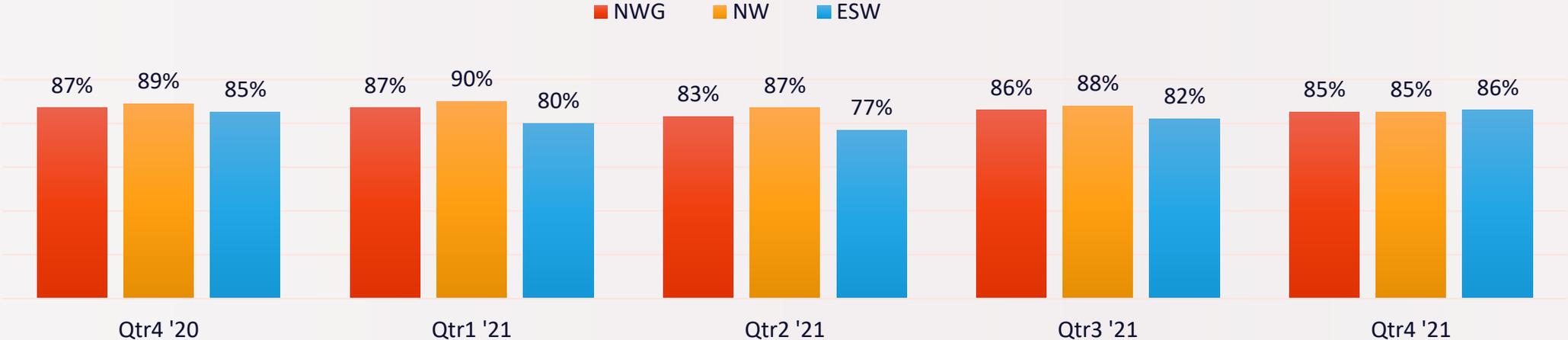
Never had any issues in the six years that I have been here. I trust them.



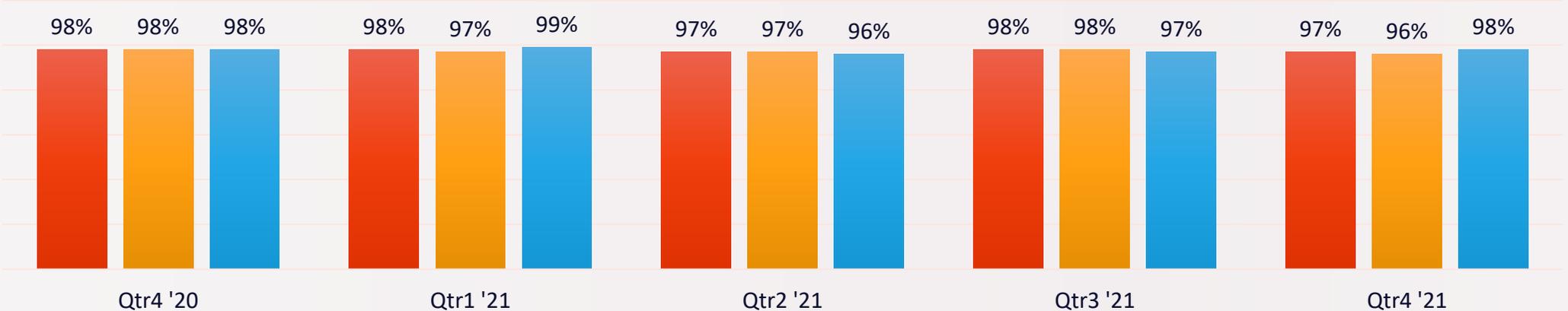
# Information and services

# 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(316) ESW (184)

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

It's down to customer service and getting in touch with them, I am fine if they ask me to put a meter reading in by the website. If an emergency I don't like waiting 20 minutes on the phone and getting charged local rates for the call.

They should have a better contact centre. In Covid time they had waiting time 20 minutes or so and it's not on, and it could be improved.

Because I'm not informed, if I have to go and look rather than be informed it isn't user friendly. They are not customer focused.

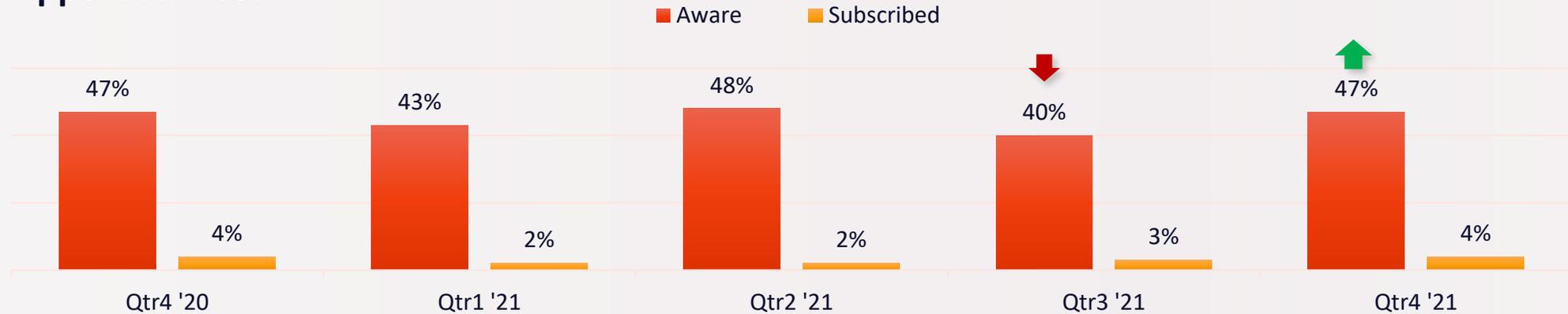
They are very slow to answer the phone. It costs a fortune on phone bills.



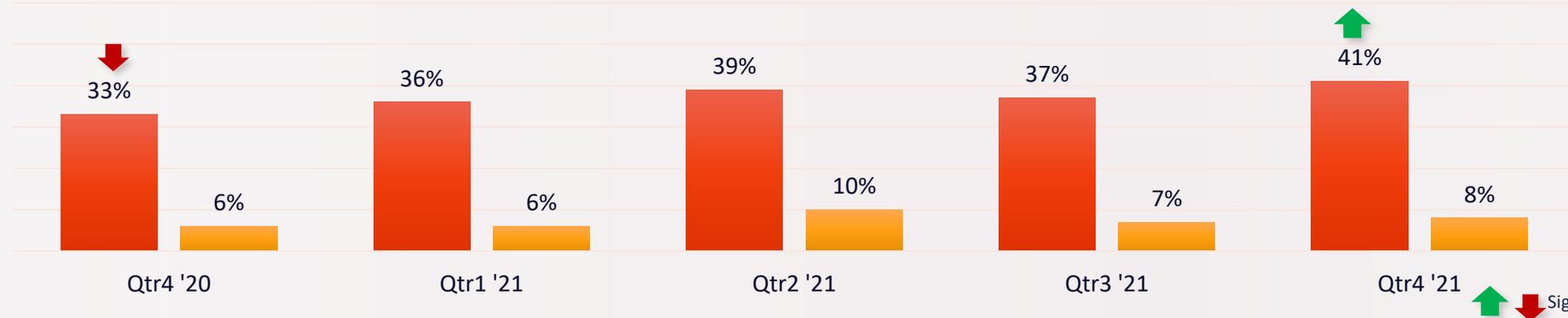
Priority services

# Priority services (NWG)

## Additional support services



## Additional financial support



↑ ↓ Significantly higher/Lower

**Q15** [Northumbrian Water / Essex & Suffolk Water] provide additional support services - such as large print or braille bills, passwords to check company callers are genuine - and also help customers who require a constant supply of water for health reasons. Were you aware that they provide these services? **Q16** also provide additional financial support for customers struggling to afford their bills - such as reduced or discounted bills and payment plans, WaterSure, SupportPlus social tariff or SupportPlus arrears. Were you aware that they provide these services? Base (500)

# Priority services (by region)

NW	Additional support services	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
	Aware	50%	45%	49%	39%	47%
Subscribed	3%	3%	2%	4%	3%	
	Additional financial support	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
	Aware	32%	35%	39%	36%	41%
Subscribed	4%	5%	10%	7%	7%	

ESW	Additional support services	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
	Aware	43%	40%	46%	41%	47%
Subscribed	4%	2%	3%	1%	5%	
	Additional financial support	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
	Aware	36%	39%	39%	39%	42%
Subscribed	10%	9%	9%	7%	10%	

Significantly higher/Lower

# Key headlines



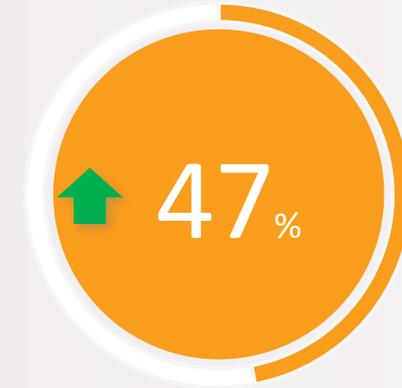
## NPS this Quarter

NPS at an overall level has increased significantly.



## NPS for ESW

One measure has improved this quarter; NPS for ESW has seen a big improvement compared to Qtr3 and this time last year



## Awareness of priority services

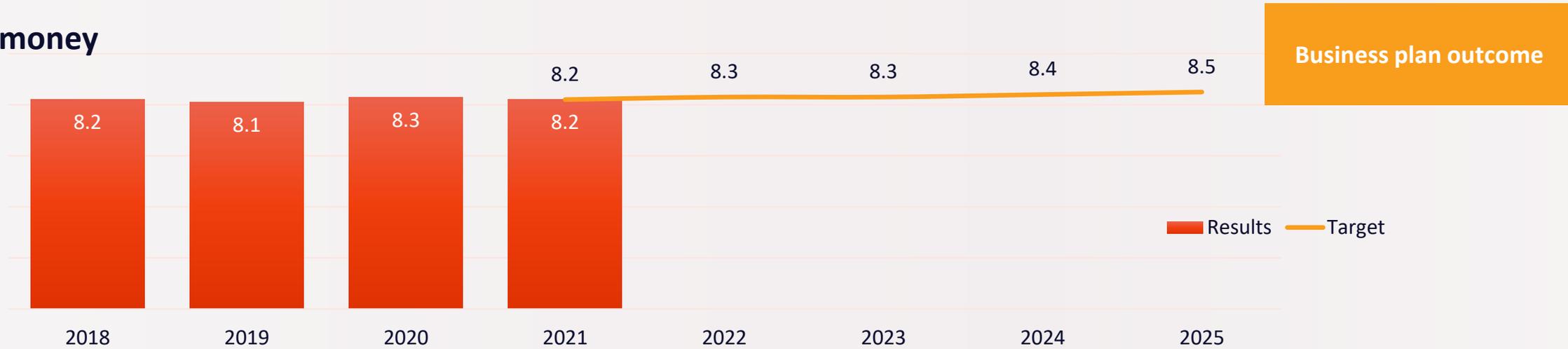
Awareness for additional support services have significantly gone up compared to Qtr3



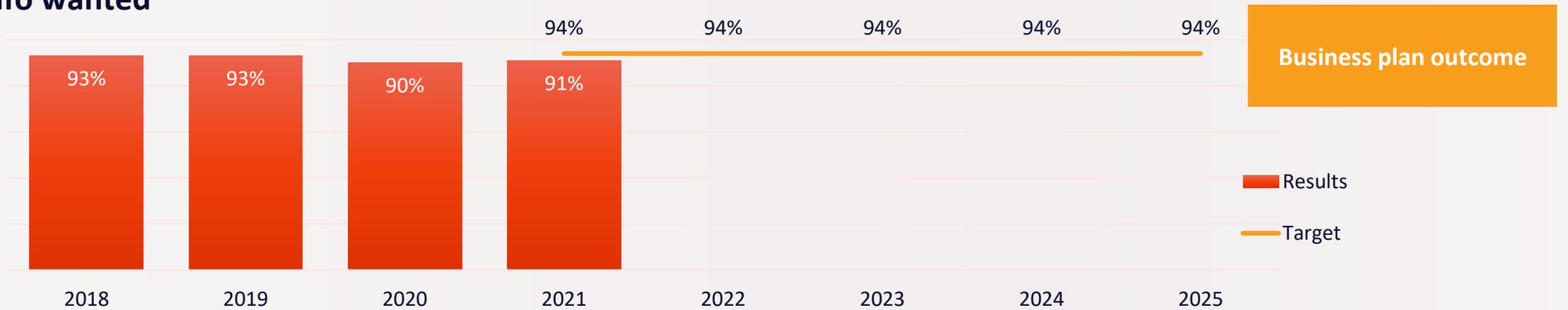
# Progress and targets

# Progress towards targets, 1

## Value for money

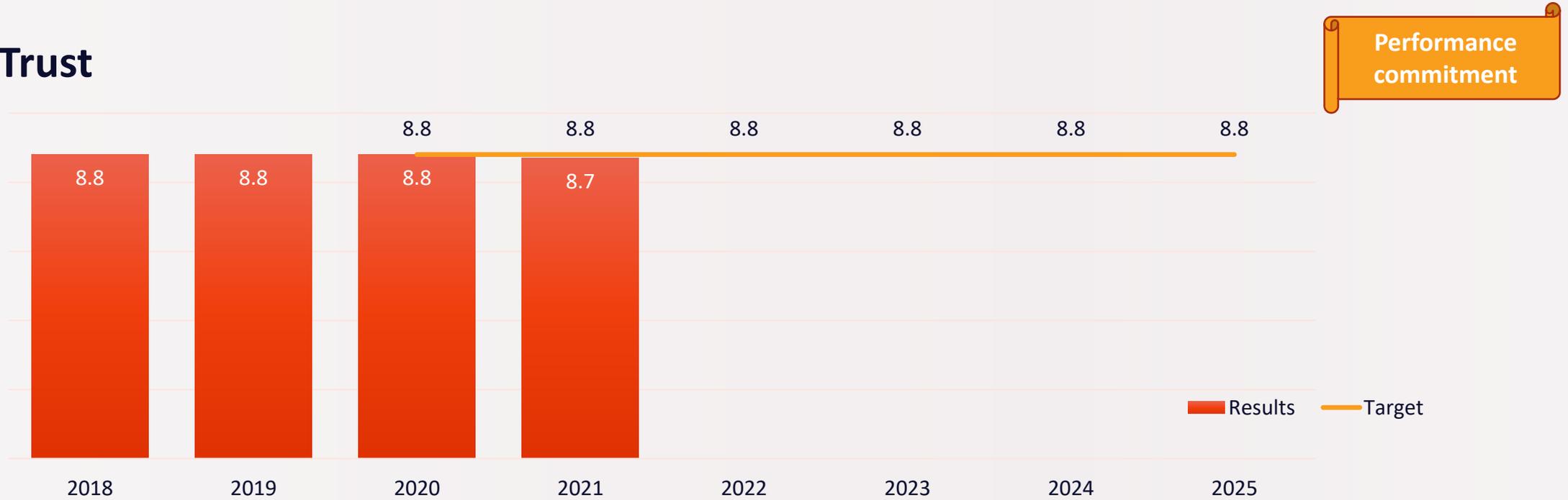


## Rec'd all info wanted



# Progress towards targets, 2

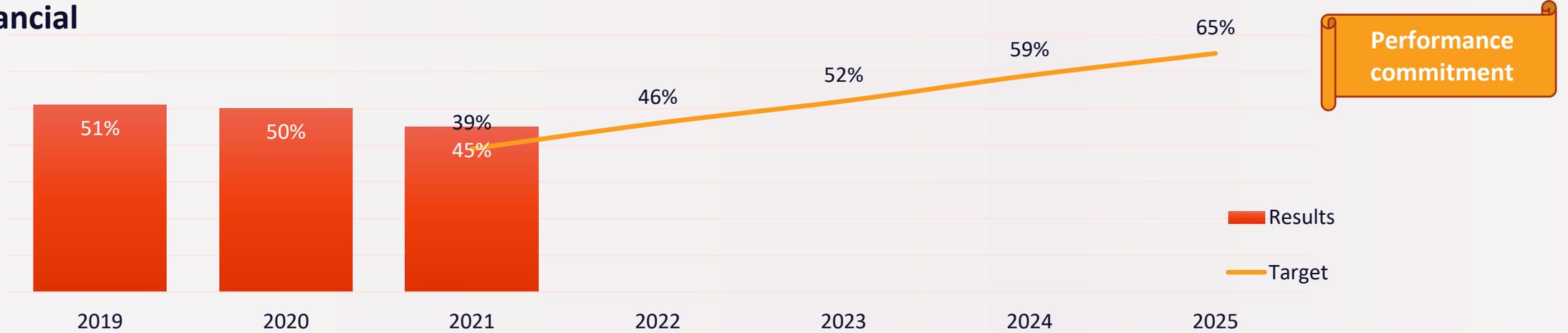
## Trust



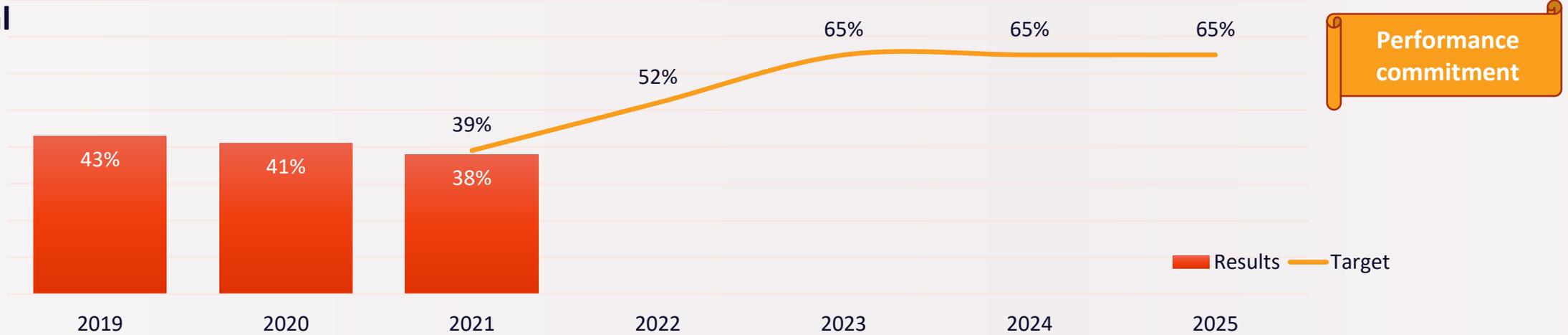
# Progress towards targets, 3

## Awareness of additional support

### Non-financial



### Financial

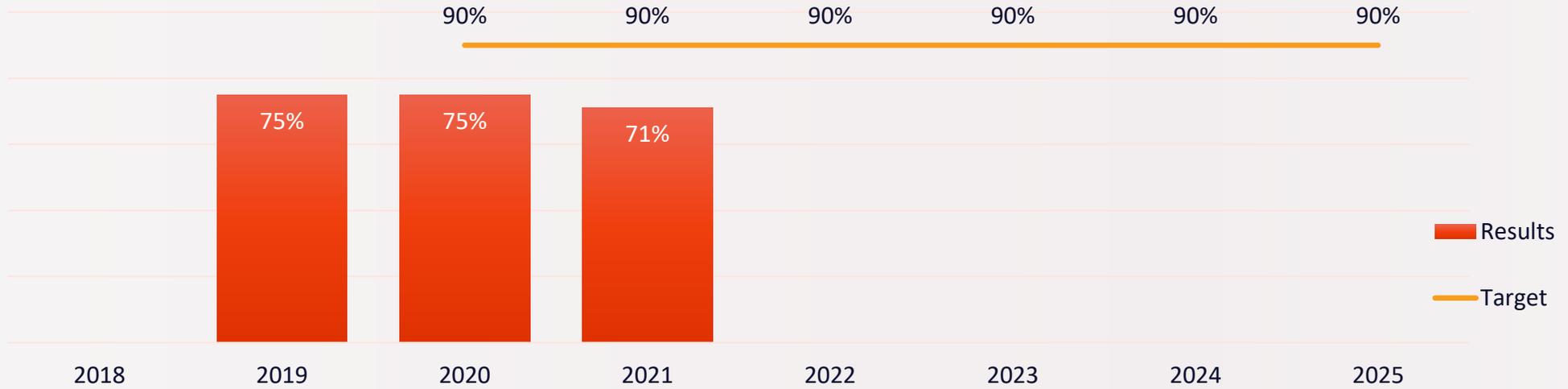


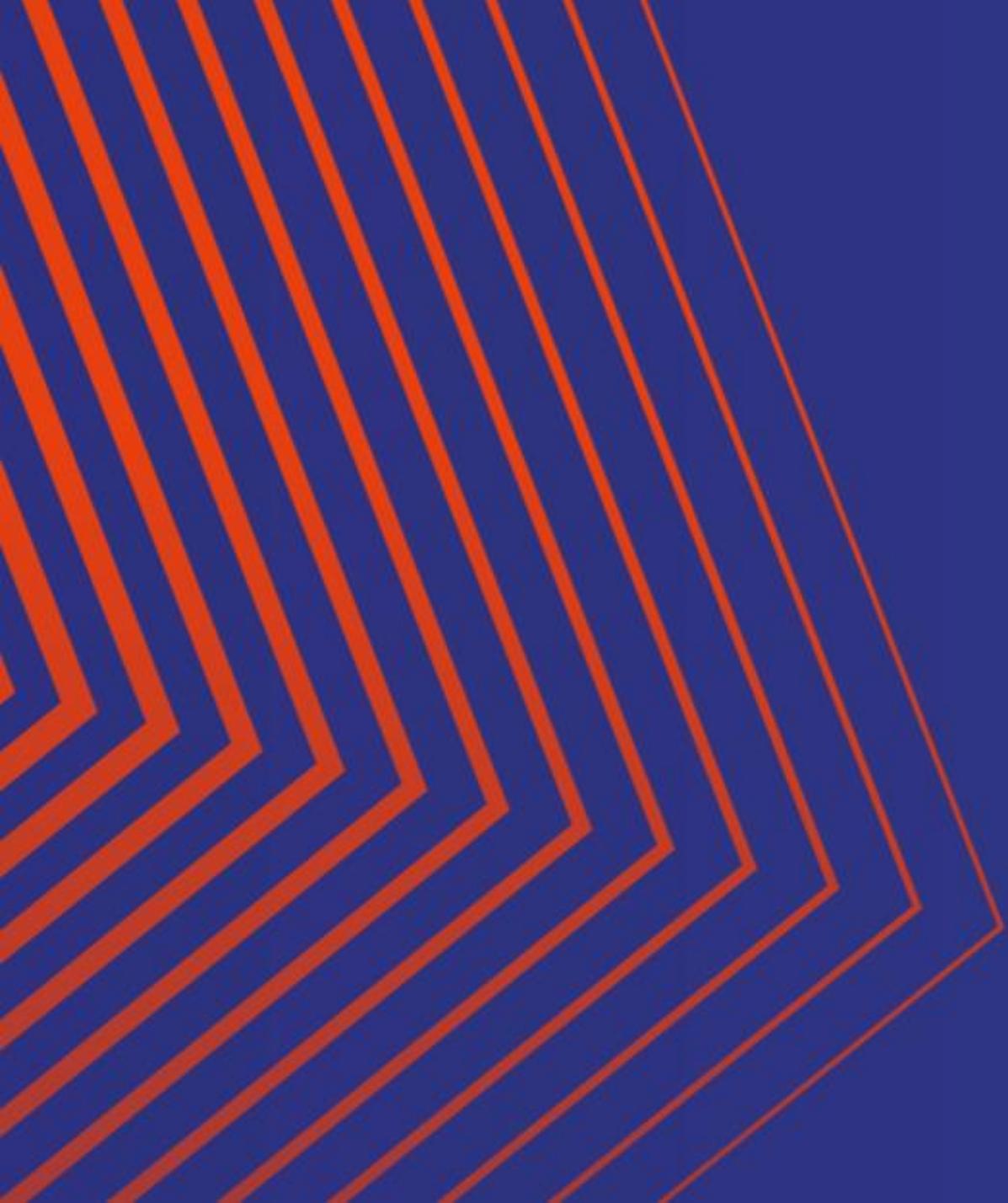
# Progress towards targets, 4

## Would choose tap water over bottled

(excl. don't know/ no pref)

**Ambitious goal**





TRINITY  
MCQUEEN