

Q3'23 Domestic Tracker

24/08/23

TRINITY
MCQUEEN

NWG
living water

Contents

What covered in
this report

3	Introduction	21	Brand values
4	NPS	24	Priority services
7	Overall satisfaction & areas of priority	28	Waterside parks
18	Company suggestions & preferences	31	Progress and targets

Introduction

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

Carried out by phone - 500 interviews per quarter

Sample provided by NWG and TPS-screened before use

Gender and age to match the homeowner population

Fieldwork dates: 10th July – 14th July 2023

Average interview length: 12.5 min

Quota	Target	Achieved
North	316	319
Essex	184	181
TOTAL	500	500

Covering this wave:

- Likelihood to recommend, with reasons
- Overall satisfaction and satisfaction with value for money
- Priority areas for the business plan and less important areas
- Company suggestions and preferences
- Brand values measures
- Awareness of support services
- Visits to Waterside parks and the influence it has on overall score

NPS

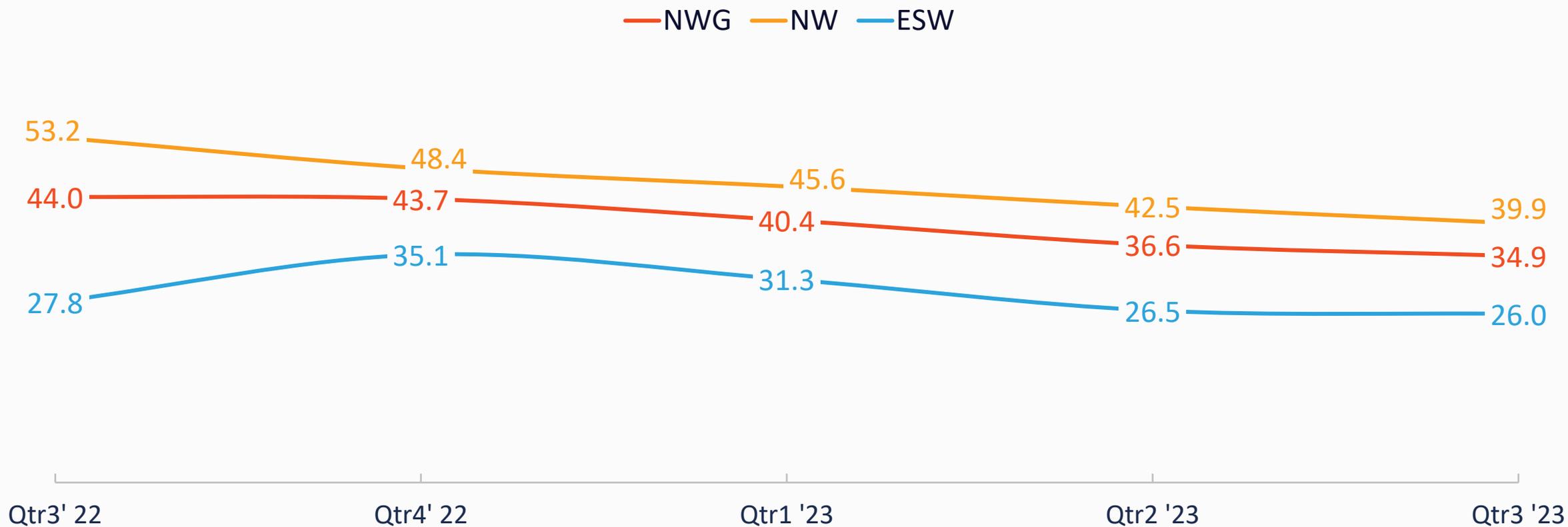


NWG
living water

TRINITY
MCQUEEN

Likelihood to recommend NWG - NPS

NPS Scores trended



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 (319), ESW (181)

Reason for NPS score

Promoters (scores of 9-10) - 251 customers

No problems	59%
Good service/customer service	12%
Good communication/updates/follow-ups/return calls etc	8%
No supply problems	8%
Good water quality	8%
Ok/fine/satisfied	6%
Quick response/solution	6%
Good/fair price/good value	5%
Resolve problems	3%
Responsive to issues/good response	3%
Helpful	3%
Other	3%
Good experience/happy with them	2%
Easy to deal with/approachable	2%
Nothing to compare against/no choice/no real dealings	14%

Passives (scores of 7-8) – 132 customers

No problems	43%
Good service/customer service	9%
No supply problems	8%
Ok/fine/satisfied	6%
Resolve problems	6%
Never give a 10/always room for improvement	5%
Good water quality	5%
Good/fair price/good value	5%
Expensive/want it cheaper	5%
Good communication/updates/follow-ups/return calls etc	4%
Poor water quality	4%
Good company/good in general/do a good job	3%
Quick response/resolution	3%
Neutral/indifferent	3%
Nothing to compare against/no choice/no real dealings	14%

Detractors (scores of 0-6) – 87 customers

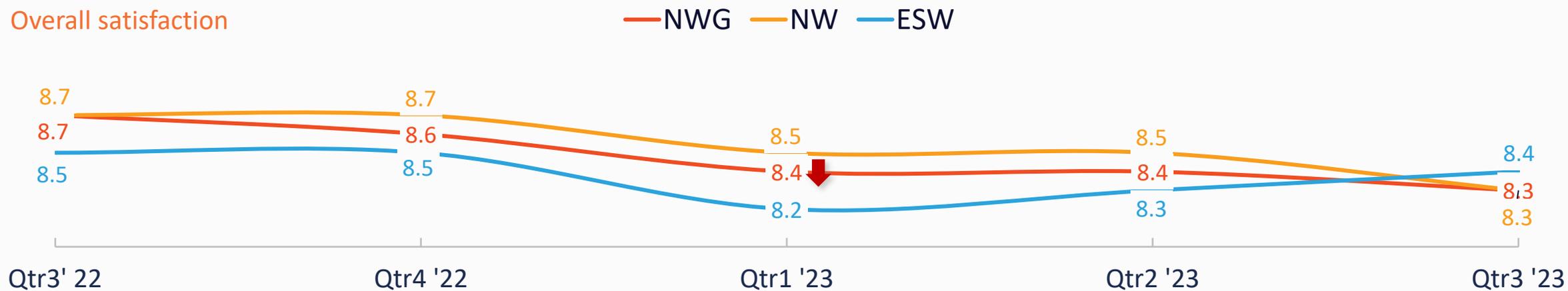
Neutral/indifferent	20%
No problems	8%
Don't recommend anything to anyone/no one to recommend to	7%
Need to do more for the environment -cleaner rivers etc	6%
Other	6%
Poor water quality	5%
Don't know	5%
Expensive/want it cheaper	3%
Ok/fine/satisfied	3%
Inconsistent water supply/interruptions/low pressure	3%
Difficult to contact/on hold/passed around	2%
Good water quality	2%
They have put prices up/increased prices	2%
Lots of leaks/not maintaining pipes/sewers etc	1%
Nothing to compare against/no choice/no real dealings	34%

Overall Satisfaction

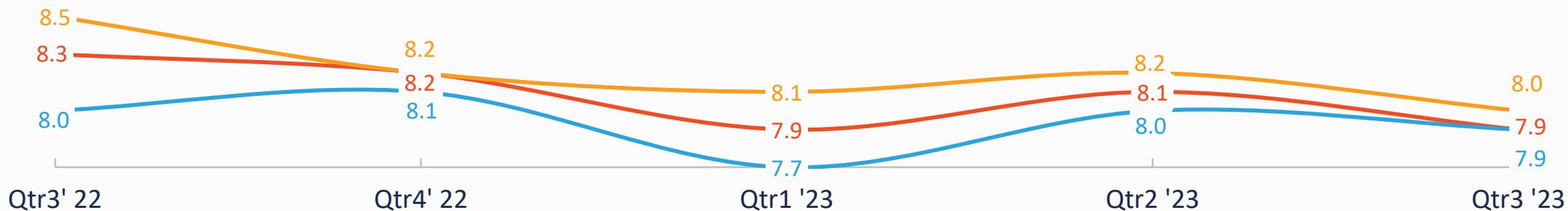


Satisfaction – overall & value for money

Overall satisfaction



Value for money satisfaction



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 (319), ESW (181)

Service satisfaction (1)

NWG

■ Qtr 3 '22
 ■ Qtr 4 '22
 ■ Qtr 1 '23
 ■ Qtr 2 '23
 ■ Qtr3 '23



NW	9.2	9.1	8.7	9.0	8.7	8.9	8.8	8.5	8.7	8.5	9.5	9.4	9.3	9.3	9.2
ESW	8.6	8.9	8.7	8.7	8.5	8.4	8.6	8.5	8.4	7.9	9.4	9.4	9.2	9.1	9.1

Service satisfaction (2)

NWG

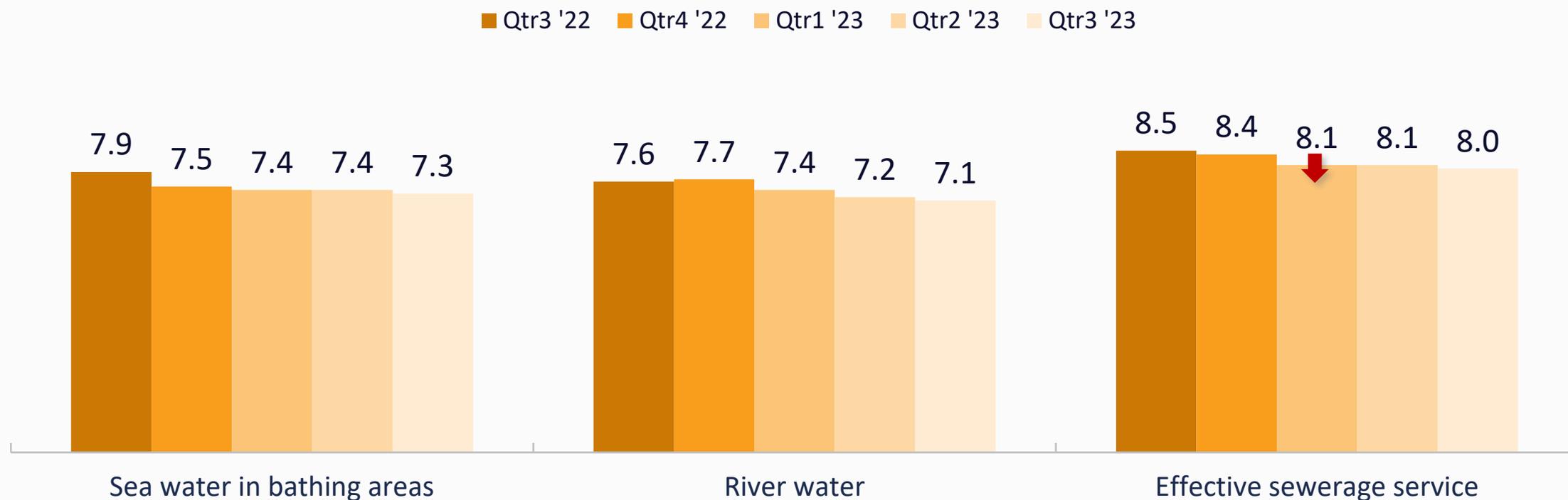
■ Qtr3 '22
 ■ Qtr4 '22
 ■ Qtr1 '23
 ■ Qtr2 '23
 ■ Qtr3 '23



NW	9.0	8.8	8.7	8.9	8.6	9.0	8.9	8.7	8.6	8.5	8.6	8.7	8.5	8.6	8.1
ESW	8.5	8.7	8.6	8.4	8.3	8.7	8.6	8.5	8.7	8.6	8.4	8.5	8.2	8.3	8.1

Service satisfaction (NW only)

NW region only



Improvements to services

Overall improvements

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

Any improvements mentioned	85%
Improve quality/taste/smell of water	25%
Cleaner rivers/sea	19%
Better ongoing sewer/pipes maintenance	18%
Reduce prices	16%
Improve water pressure	12%
More detail/clarity on charges	12%
Cleaner beaches	11%
More accurate bills/read meters more often	8%
Replace old infrastructure/improve capacity	7%
More information on their services/what they do	7%
Repair leaks (more quickly)	6%
Quicker resolution of issues/problems	6%
Improve flood defences	5%



Areas of the business plan that respondents think should be a priority

(NWG)

NWG Total



Moved up/down in priority

Ranking

Q3'23

Q2'23

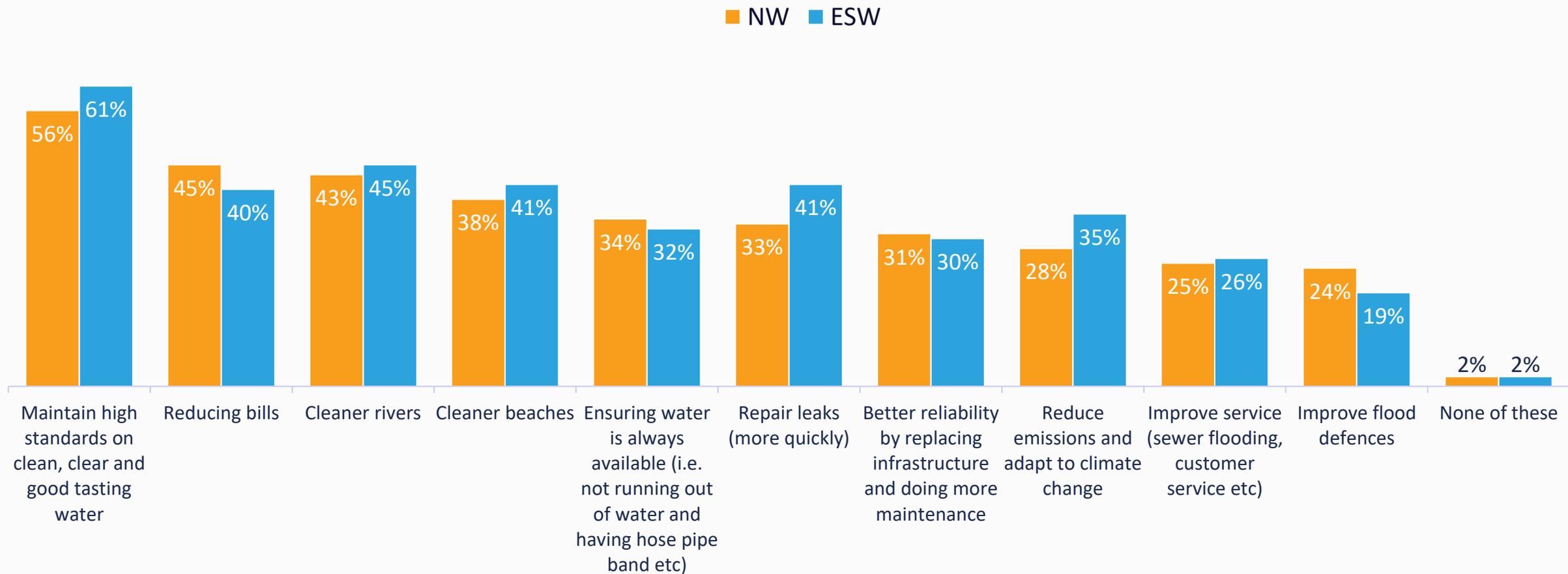
Maintain high standards on clean, clear and good tasting water	1	1
Cleaner rivers	2	2
Reducing bills	3	5
Cleaner beaches	4	3
Repair leaks (more quickly)	5	4
Ensuring water is always available	6	6
Better reliability by replacing infrastructure and doing more maintenance	7	8
Reduce emissions and adapt to climate change	8	7
Improve service (sewer flooding, customer service etc)	9	10
Improve flood defences	10	9
None of these	11	11

Q5c. So, which of these would you say should be priority areas for [Northumbrian Water/Essex & Suffolk Water]? Base

NWG (500)

Areas of the business plan that respondents think should be a priority

(NW & ESW)



Q5c. So, which of these would you say should be priority areas for [Northumbrian Water/Essex & Suffolk Water]? Base NW (319), ESW (181)

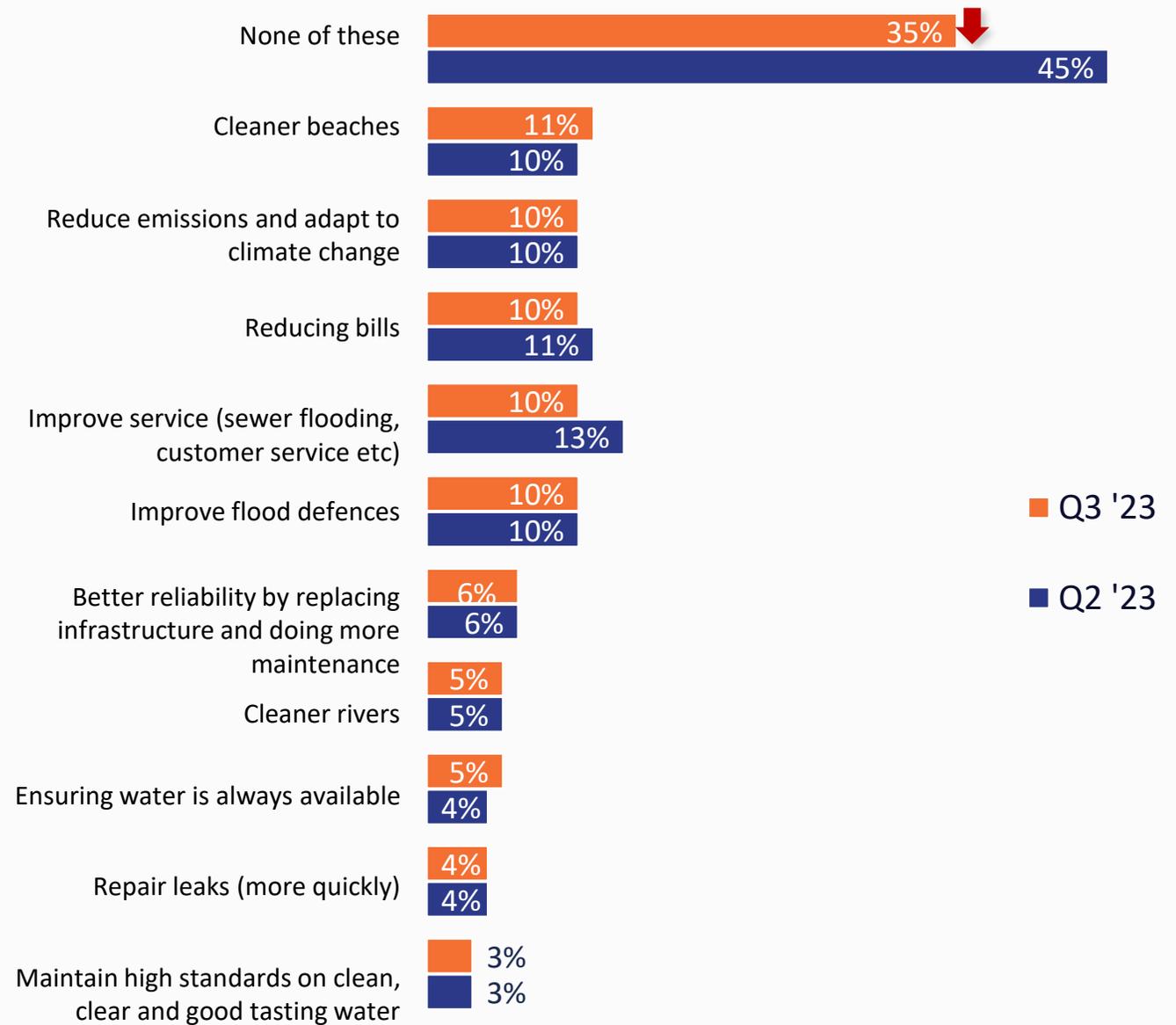


Areas of the business plan that respondents think are less important

(NWG)

NWG Total

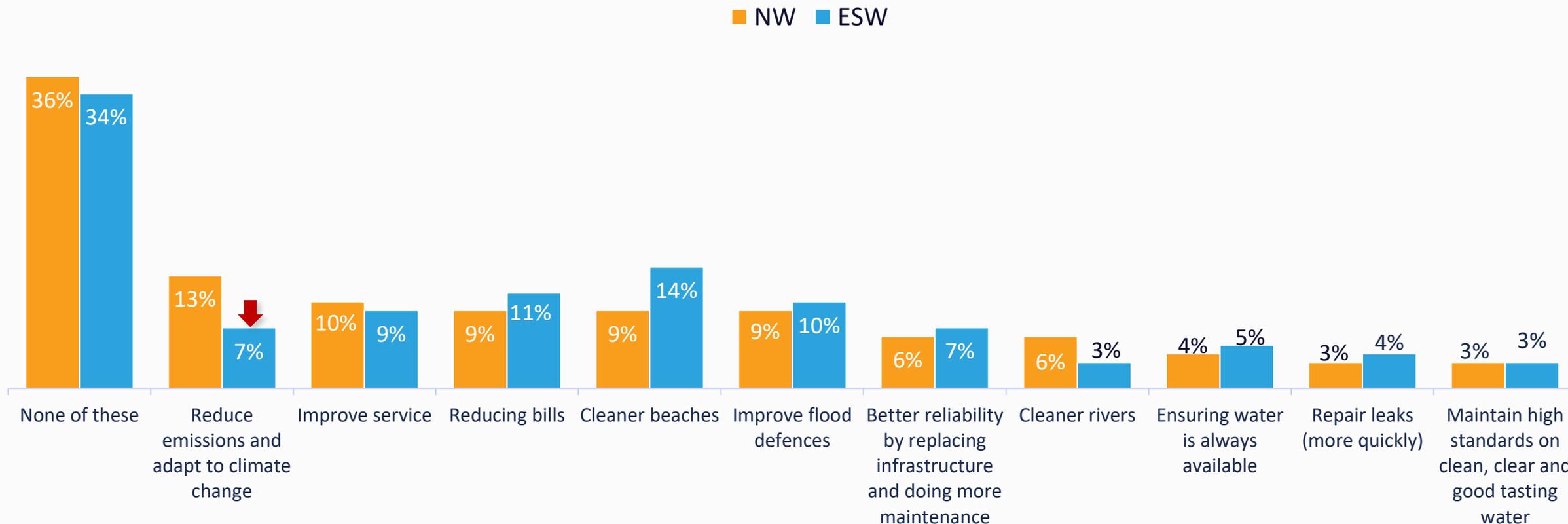
↑ ↓ Significantly higher/Lower than previous Qtr



Q5d. And which of these, if any, do you think is less important for them to focus on? Base: NWG (500)

Areas of the business plan that respondents think are less important

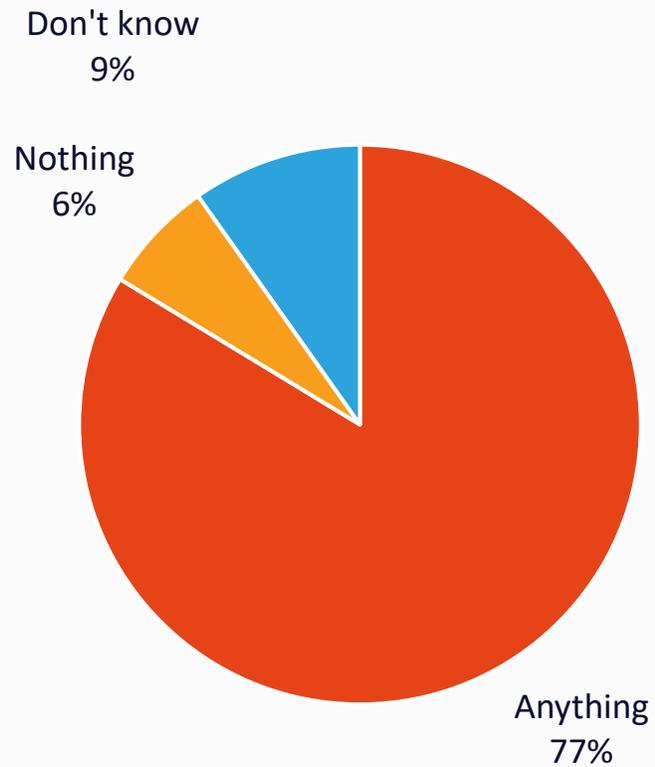
(NW & ESW)



Q5d. And which of these, if any, do you think is less important for them to focus on? Base: NW (319), ESW (181)

What the company does well

NWG



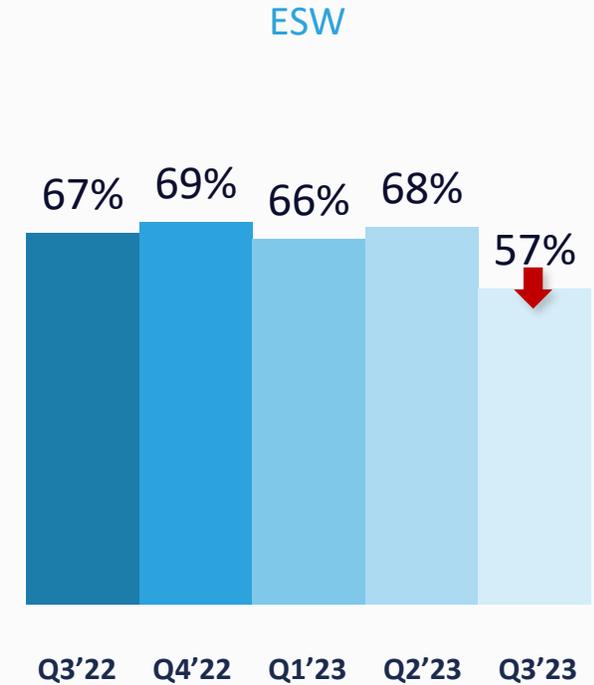
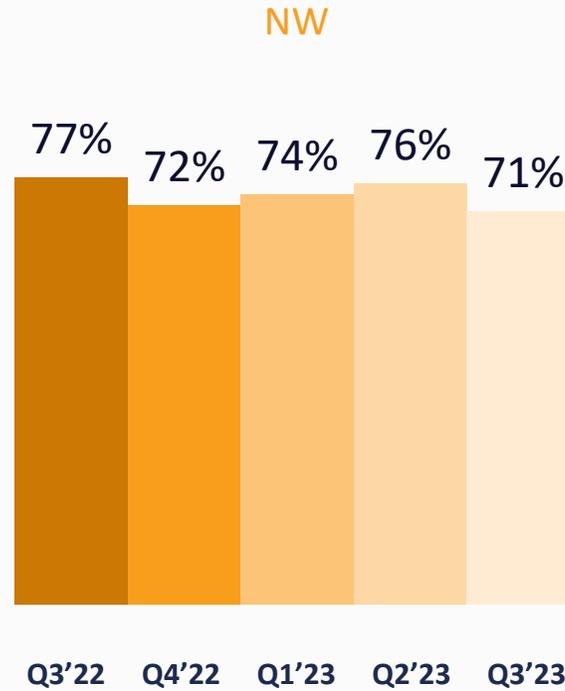
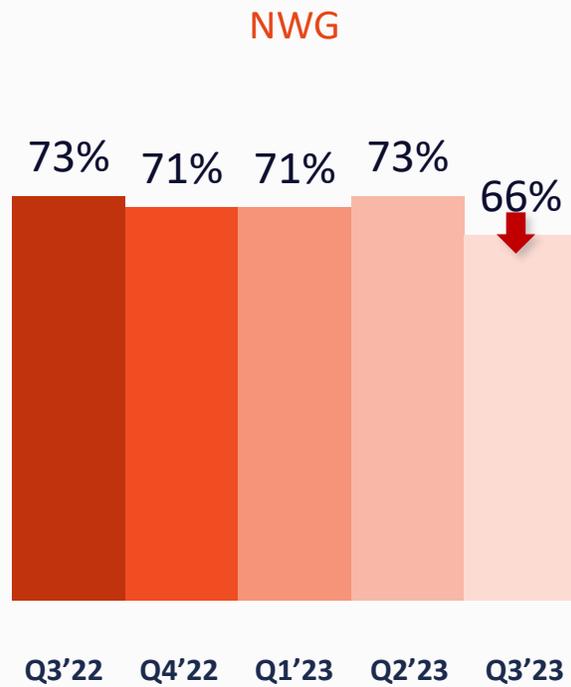
500 customers	
Reliable supply of water	35%
Good quality water/tastes/smells good	30%
Other	16%
Helpful/friendly/professional call centre staff	14%
Never had any problem/never need to contact them	14%
Respond quickly to issues/problems/resolve issues	11%
Good water pressure	10%
Easy to contact	10%
Timely/accurate bills	9%
Keep customers informed of progress on issues raised	8%
Repair leaks quickly	8%
Provide good information on services/what the company does	7%
Notify customers if there are going to be works	6%
Fair prices	6%
Good ongoing maintenance of sewers/pipes	6%
Good website/online services	5%

Company suggestions and preferences



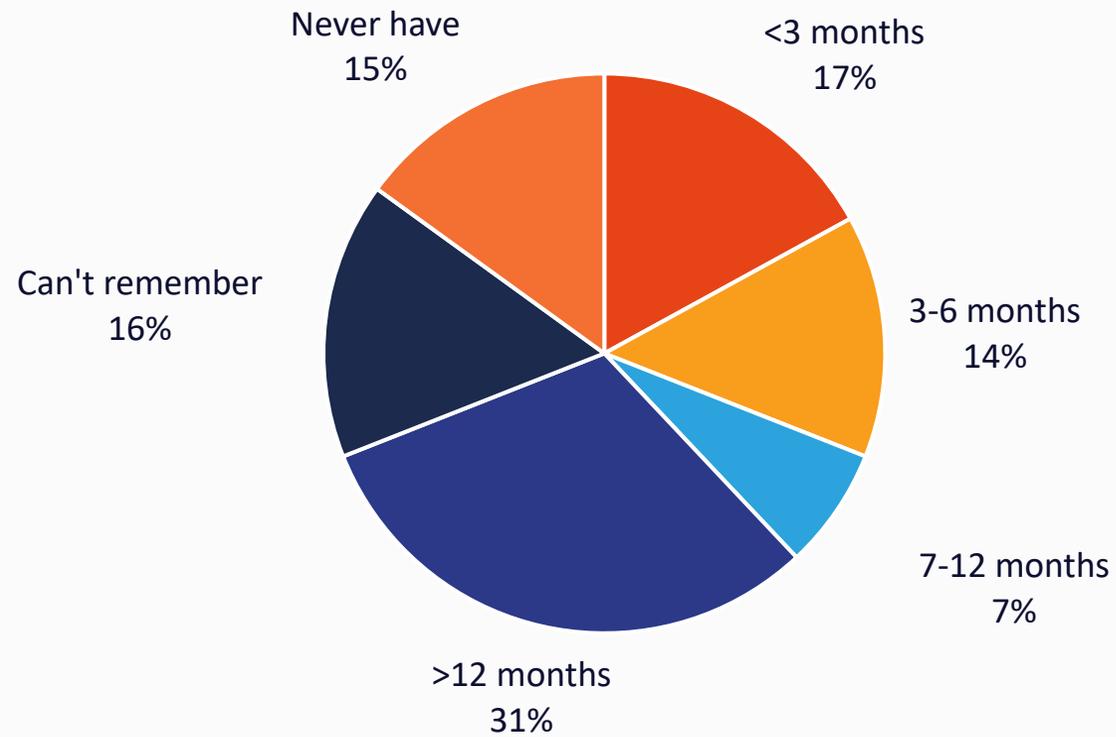
Tap water preference

% who prefer tap water over bottled water



Contact with NWG

When last had contact with NWG?



Brand values



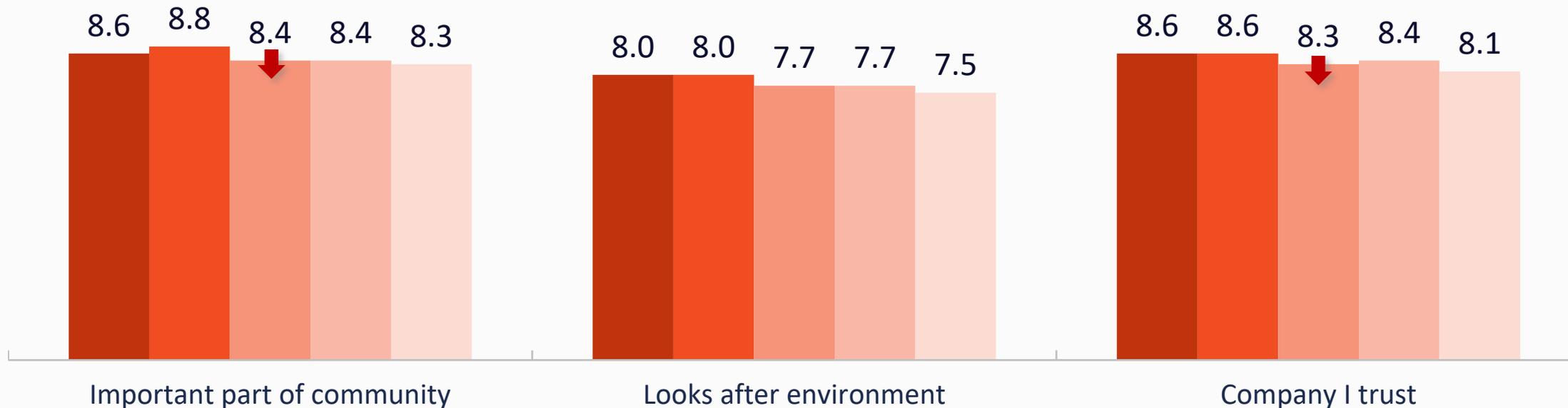
NWVG
living water

TRINITY
MCQUEEN

Brand values

Overall service satisfaction

■ Qtr 3 '22
 ■ Qtr4 '22
 ■ Qtr1 '23
 ■ Qtr2 '23
 ■ Qtr3 '23



NW	8.7	9.0	8.5	8.6	8.2	8.2	8.1
ESW	8.3	8.4	8.2	8.0	8.4	7.7	7.4

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 (319), ESW (181)

Comments relating to trust score

Top 10 comments - 500 customers

Never had any problems	27%
Reliable water supply	12%
Good quality water supply	11%
Reliable/trustworthy	11%
No reason not to trust them/just trust them	9%
Good customer service/good service	8%
Happy with them/do a good job	6%
Good communication	5%
Others	5%
Need to do more environmentally - clean rivers/beaches etc	4%
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	6%

I don't know any water company that is doing a good job, they are heavily in debt, dividends to shareholders and not enough to protect the river courses and beaches.

-Trust score 0-6

Well we never had issues with them even with the occasion like the leakage where we lived before, they straight away responded, they kept us updated not only myself but the interstate I lived in everyone was getting messages saying we are on it.

- Trust score 7-10

Because literally I never had any problems with water. The water has always been clean. Always get a text when there are works on water. They explain everything.

- Trust score 7-10

It is a monopoly, you can't have a private company own a service where you have no choice, and they place profitability above everything else which makes me very angry.

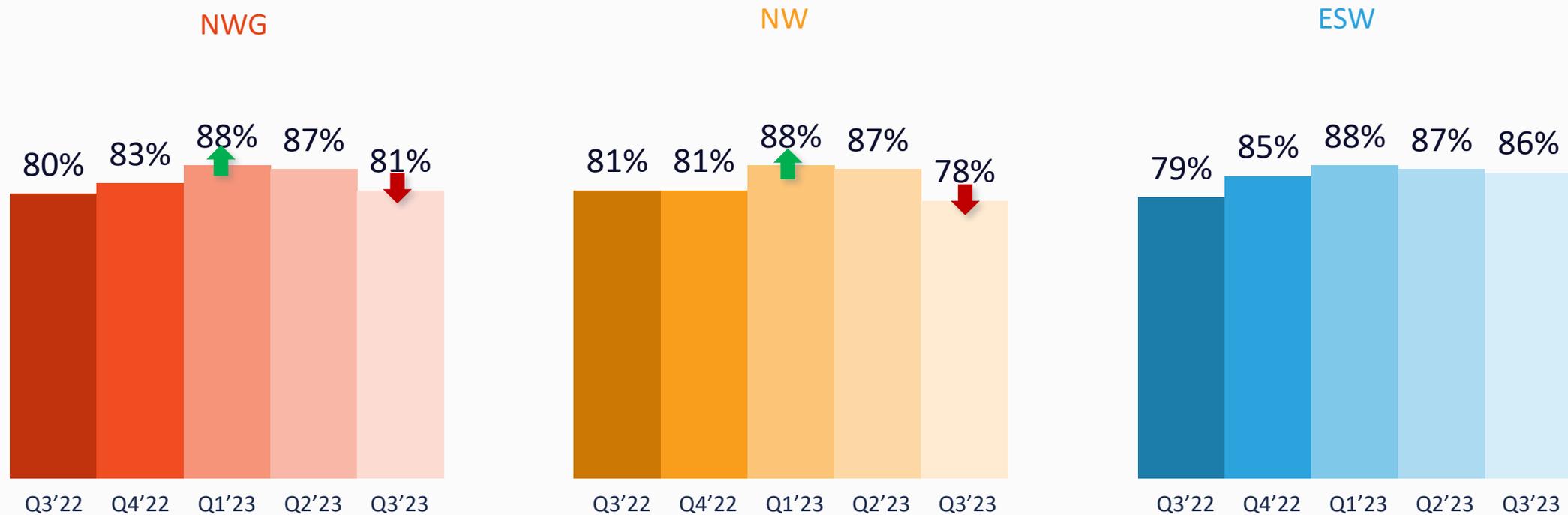
-Trust score 0-6

Priority services



Information and services access

% Received all information wanted, to feel informed

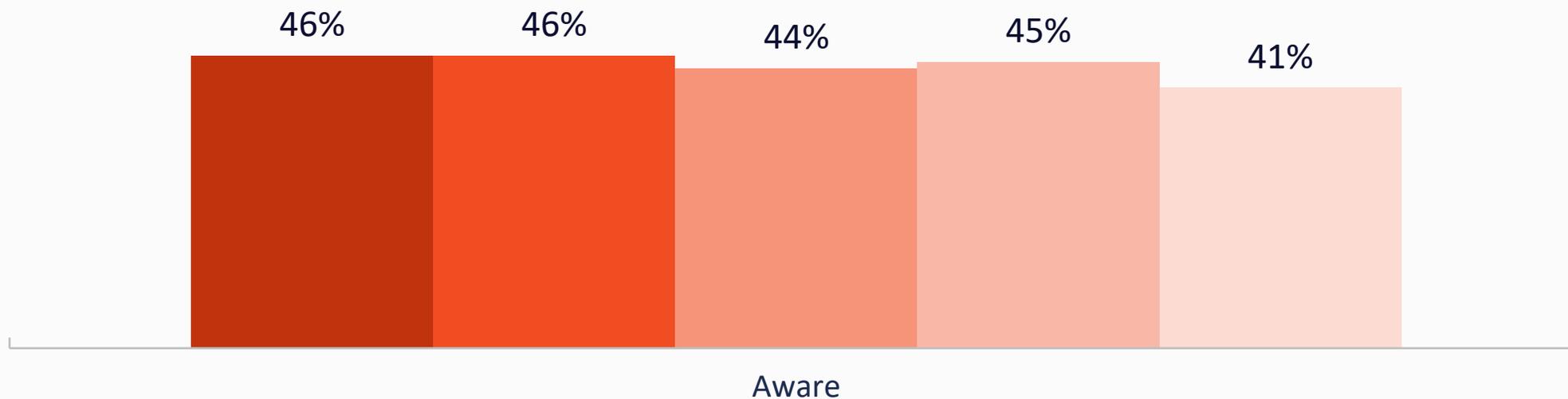


Q8: Has [Northumbrian Water/Essex & Suffolk Water] supplied you with all the information you want, to feel informed about water [NW: and sewerage] services in your area? Base NWG (500), NW (319), ESW (181)

Priority services (1)

Awareness/usage of additional support services

■ Qtr3 '22
 ■ Qtr4 '22
 ■ Qtr1 '23
 ■ Qtr2 '23
 ■ Qtr3 '23

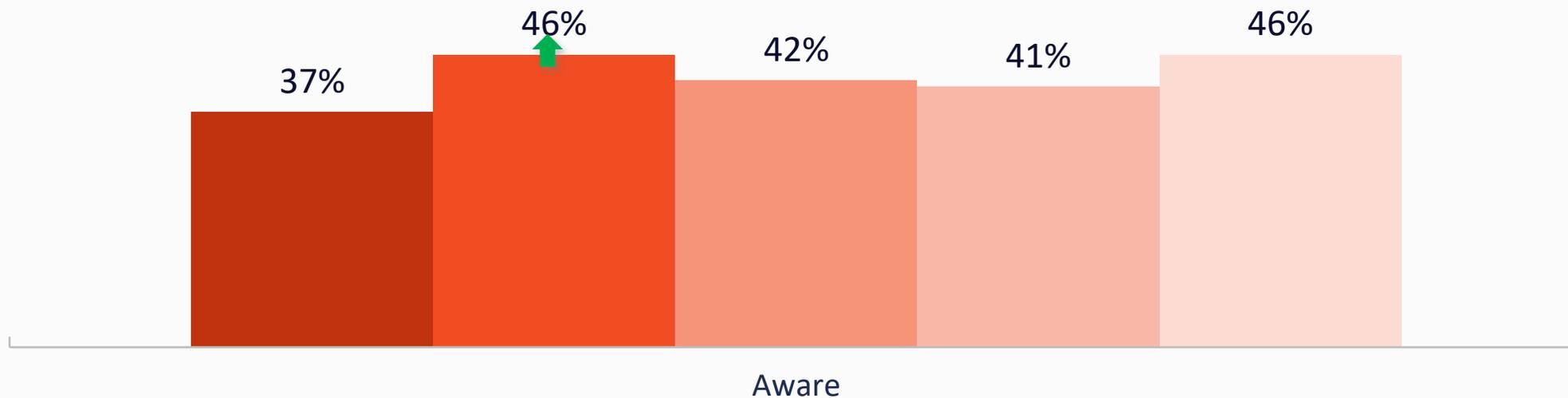


	Qtr3 '22	Qtr4 '22	Qtr1 '23	Qtr2 '23	Qtr3 '23
NW	47%	50%	43%	45%	39%
ESW	45%	40%	45%	45%	45%

Priority services (2)

Awareness/usage of additional financial services

■ Qtr3 '22 ■ Qtr4 '22 ■ Qtr1 '23 ■ Qtr2 '23 ■ Qtr3 '23

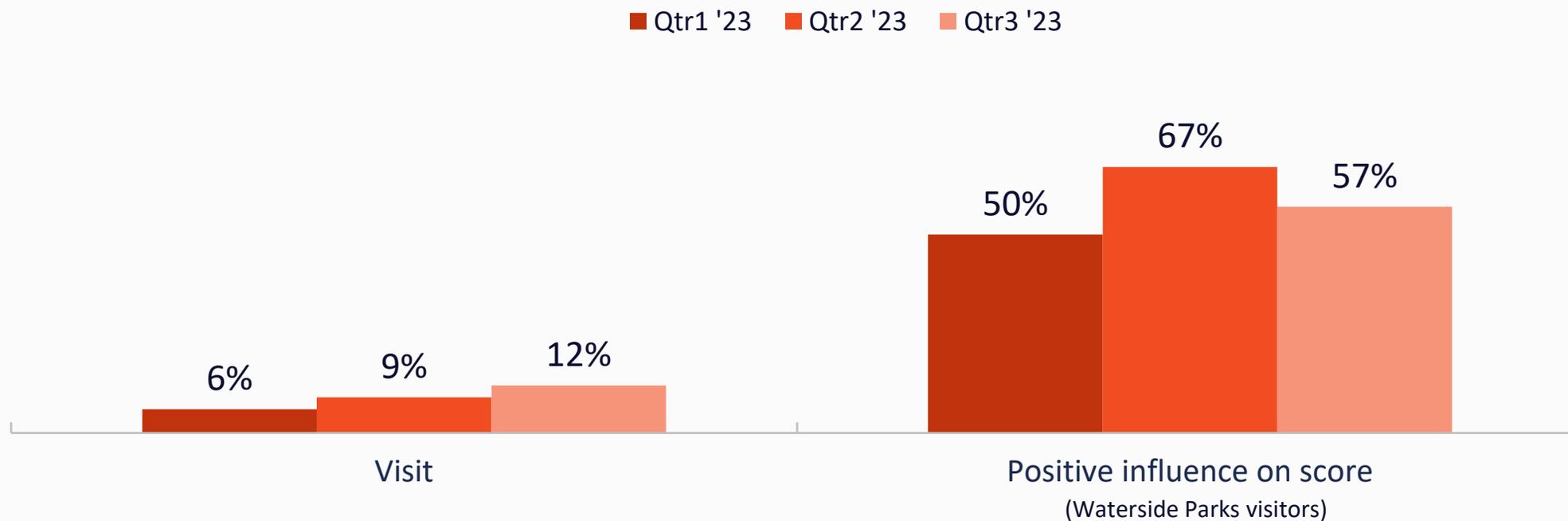


	Qtr3 '22	Qtr4 '22	Qtr1 '23	Qtr2 '23	Qtr3 '23
NW	40%	48% ↑	42%	40%	48% ↑
ESW	32%	43% ↑	41%	42%	41%

Waterside Parks



Waterside Parks



	Qtr1 '23	Qtr2 '23	Qtr3 '23	Qtr1 '23	Qtr2 '23	Qtr3 '23
NW	6%	12% ↑	14%	63%	66%	59%
ESW*	7%	4%	9%	31%	75%	50%

* Caution – low base

Q27. Have you visited a NW/ESW Waterside Park in the last 12 months? These Waterside parks include: Derwent, Fontburn, Hanningfield, Waterside Parks and Kielder Waterside. Base NWG (500), NW (319), ESW (181)

Q28. Would you say that your visit to one of our Waterside Parks has positively influenced how you've scored your overall satisfaction of the services provided by NW/ESW? Base NWG (60), NW (44), ESW (16)

Key headlines



NPS this quarter

NWG's NPS continues to steadily decline. This is driven more by the NW region; results for ESW appear to be stabilising.



Service satisfaction

A few areas of service have seen a decline this quarter – the largest fall was for 'clear explanation of charges' (driven by NW), but 'clean & clear', and 'tastes & smells good' (especially ESW) also fell. Moreover, and perhaps linked, the proportion preferring tap to bottled water has fallen significantly for ESW.



Brand Values

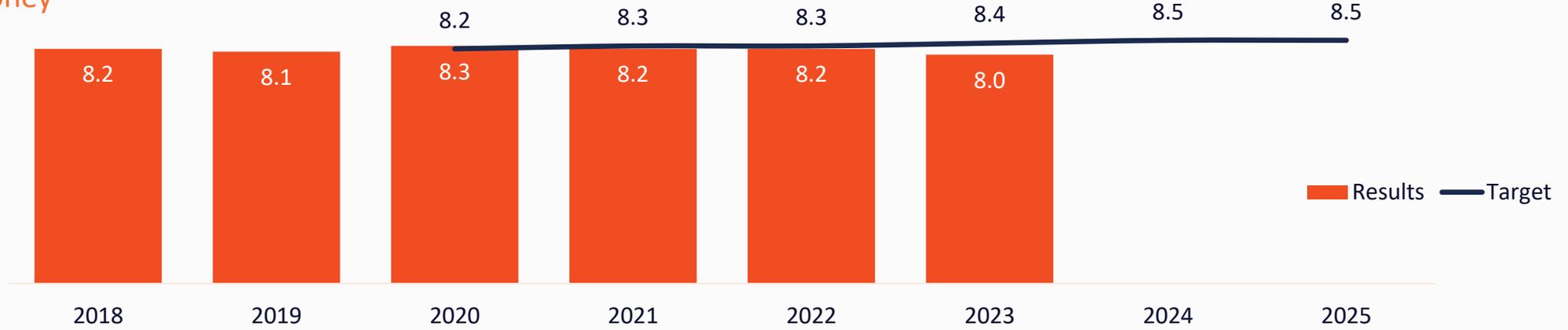
The brand value 'company I trust' has slightly declined this quarter. However, the fall in the NW region is statistically significant (from 8.5 to 8.1).

Progress and targets

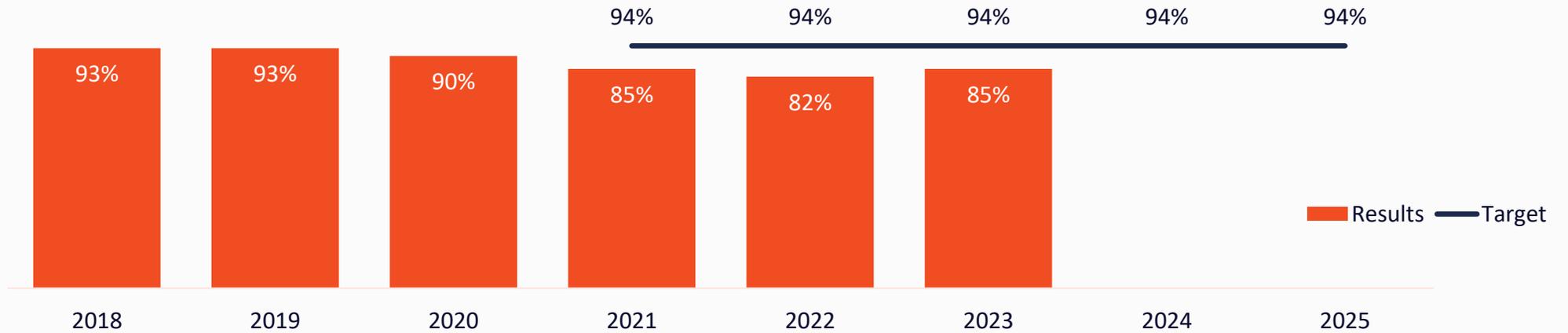


Progress towards targets – Business Plan Outcome

Value for money

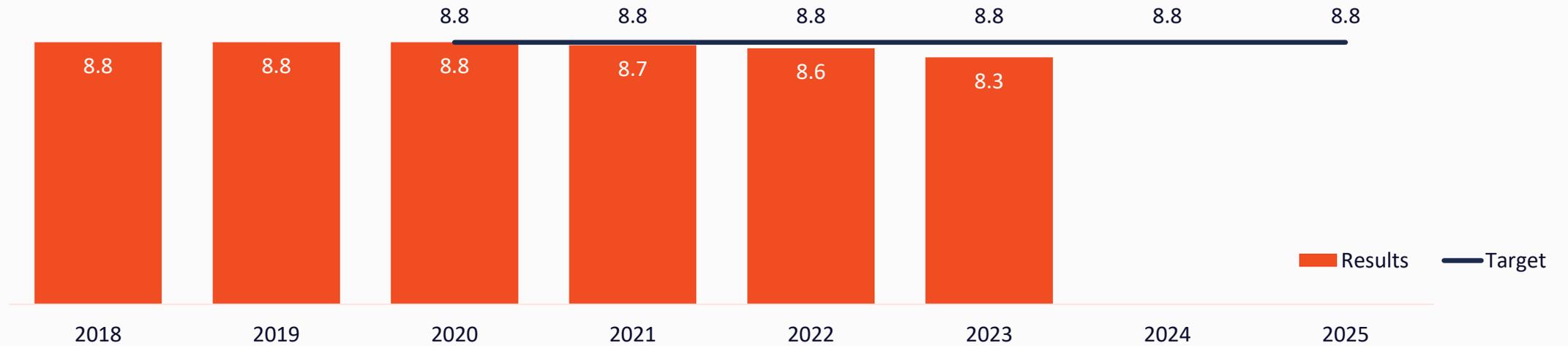


Rec'd all info wanted



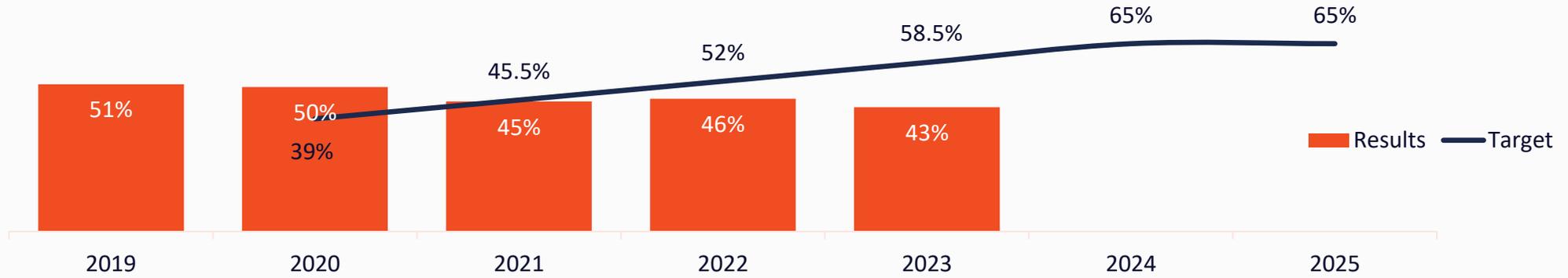
Progress towards targets – Performance Commitment

Trust

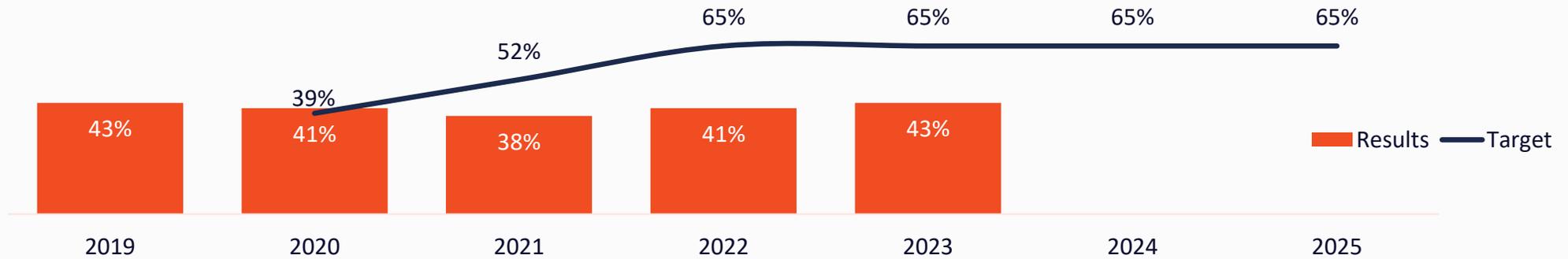


Progress towards targets – Performance Commitment

Awareness of non-financial support services

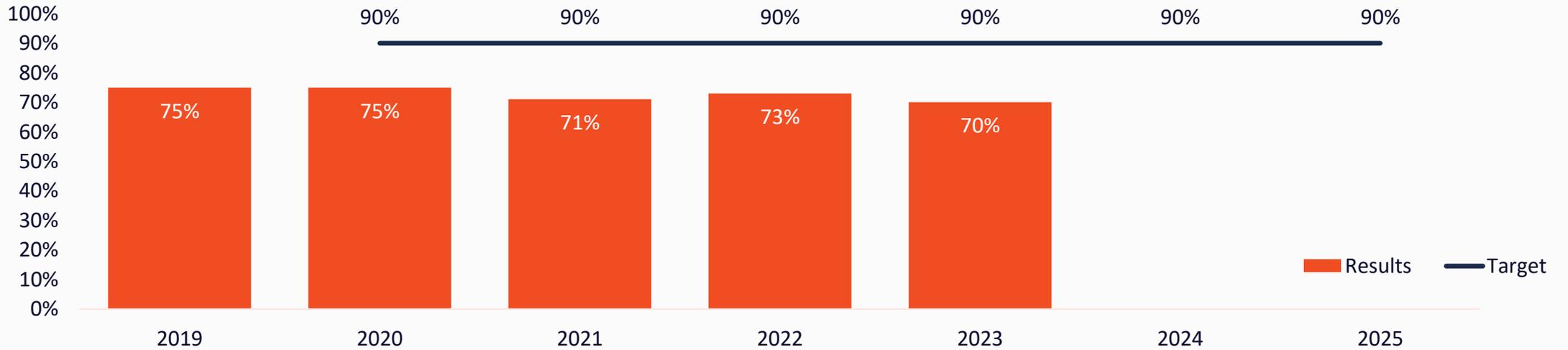


Awareness of financial support services



Progress towards targets – Ambitious Goal

Would choose tap water over bottled (excl. those who have no preference)



The image features a dark blue gradient background that transitions to a bright orange gradient at the bottom. On the left side, there are several overlapping circles of varying sizes, some in white and some in orange. The text 'TRINITY' is written in orange, and 'MCQUEEN' is written in white, both in a clean, sans-serif font. The text is positioned within one of the white circles.

TRINITY
MCQUEEN