

Brand Values 2021 Survey findings

NWG
15/10/2021

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Introduction

What drives perceptions of the brand, and how is it seen by customers?

This report details the findings of the 2021 survey designed to track consumer perceptions of NWG's brand values – a total of 700 interviews were conducted by phone between 8th – 28th September 2021. The total spread across the sub-regions was as follows:

Location	Interviews
North	432
Essex	216
Suffolk	52
TOTAL	700

Sample was provided by NWG, and we removed any customers who are TPS registered, before use. To qualify to take part, respondents had to be the person in the household who would deal with NWG (either solely or jointly). Note that this survey covers home-owners only; in the case of households renting their property, it will often be the landlord rather than the tenant who deals with water and sewerage bills. The mean average interview length was 21 minutes, and the response rate (interviews as a proportion of interviews plus refusals) 15%. We set age quotas, and have achieved the desired overall sample spread, with an age profile in line with the national home-owner population (as detailed in the Labour Force Survey).



Headlines

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Headlines (1)

Brand recognition

When asked which companies are most associated with their region, it was to be expected that NW and ESW were the brands most commonly associated with their region. This is because respondents had to be informed at the outset that this survey was being carried out on behalf of NW/ESW (in order to secure co-operation at a cost-effective rate). In the North, NW has a much clearer stand out compared to other water companies, while in Essex/Suffolk due to other close by water companies, ESW stand out is dialled down.

Comms recall

An overwhelming majority across both regions can recall seeing or hearing anything about NW or ESW in the past 6 months (92% in the North, 94% Essex/Suffolk), significantly more than in 2020. Bills and on a vehicle were the most common ways of seeing or hearing from the brand.

Customer service excellence

Just over half of respondents could recall an instance of excellent customer service, with 15% in the North recalling NW and 12% in the South naming ESW. Mobile and broadband brands, retailers and energy suppliers were also listed. Two fifths of customers have contacted NW or ESW in the past 12 months, with those in the NW region more likely to have contacted a water company less than three months ago.

Headlines (2)

Overall satisfaction/perceptions

After a significant improvement in NPS score last year, NPS has significantly declined this year overall and is +41.8. This is driven by declines in scores in Essex specifically (+28.1 2021 vs +42.4 2020). For overall experience of the company, mean score satisfaction was 8.5 out of 10, with an 'NPS equivalent score' of +45.9 (a significant decrease on 2020). The most important improvement to raise the score to 7-8 or 9-10 is providing better value for money.

Brand values

Similar to overall satisfaction, there have been significant declines since 2020 on all the brand value elements. Providing bills that are clear and transparent is rated the highest, while Innovative is the lowest.

Customer priority areas

Half of customers would rank top quality water as the primary issue for the business to prioritise, followed by value for money.



Respondents and their households

Demographics and billing profile

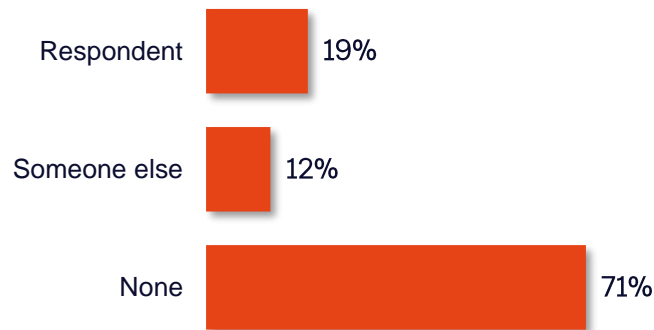
The sample profile this year is fairly similar to that achieved on the previous wave of this survey, carried out in 2020

Sample profile	Total	NW	ESW
Male	44%	45%	44%
Female	56%	55%	56%
16-34	10%	10%	10%
35-44	16%	16%	15%
45-54	19%	19%	20%
55-64	20%	20%	19%
65+	34%	33%	35%
AB	29%	30%	26%
C1	44%	40%	51%
C2	11%	13%	8%
D	9%	9%	9%
E	6%	8%	4%
Information refused	1%	0%	1%

Billing profile	Total	NW	ESW
Metered	62%	53%	78%
Not metered	38%	47%	22%
Direct debit	78%	81%	75%
Not direct debit	22%	19%	25%

Disability and benefits

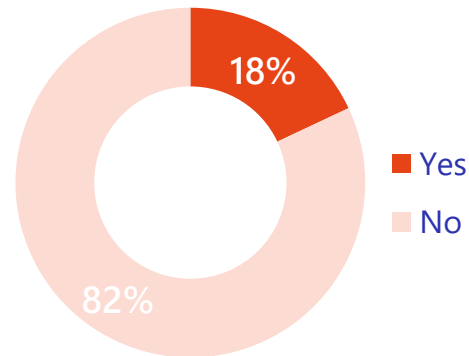
Three in ten households contain at least one person affected by a long-term illness or disability.



The number of households which contain someone with a long-term illness or disability increase with age. Levels are highest amongst the DE socio economic group with almost half impacted by an illness or disability.

Q22. Are you, or is anyone in your household affected by a long-term illness or disability? Base: all respondents, where answer given (692)

Almost one in five households are in receipt of income support or any other benefits

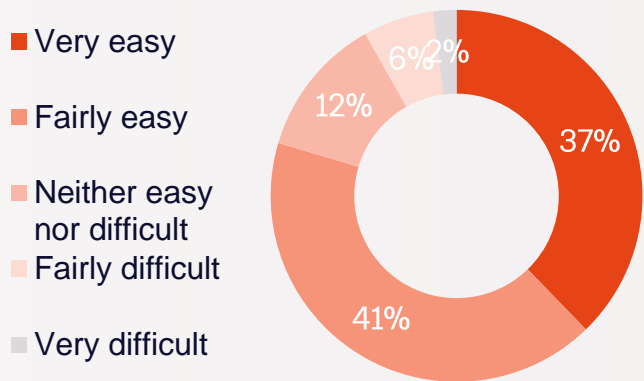


Similar to previous years, women are more likely to receive income support than men (24% vs 10%). A third of the DE socio economic group are on benefits.

Q21. Are you currently in receipt of Universal Credit or any other benefits? Base: all respondents, where answer given (695)

Ease of understanding bills, and overall vulnerability

Over three quarters say they find it easy to understand bills and official documents



38% Meet the criteria for vulnerable circumstances

(Anyone in receipt of benefits, having anyone in the household with a disability or long-term condition, and/or finding it difficult to understand official documents)

Those on benefits and those with a disability in the household are particularly likely to find it difficult to understand bills.

Q23. How easy or difficult do you find it, to understand bills and official documents? Base: all respondents, where answer given (688)



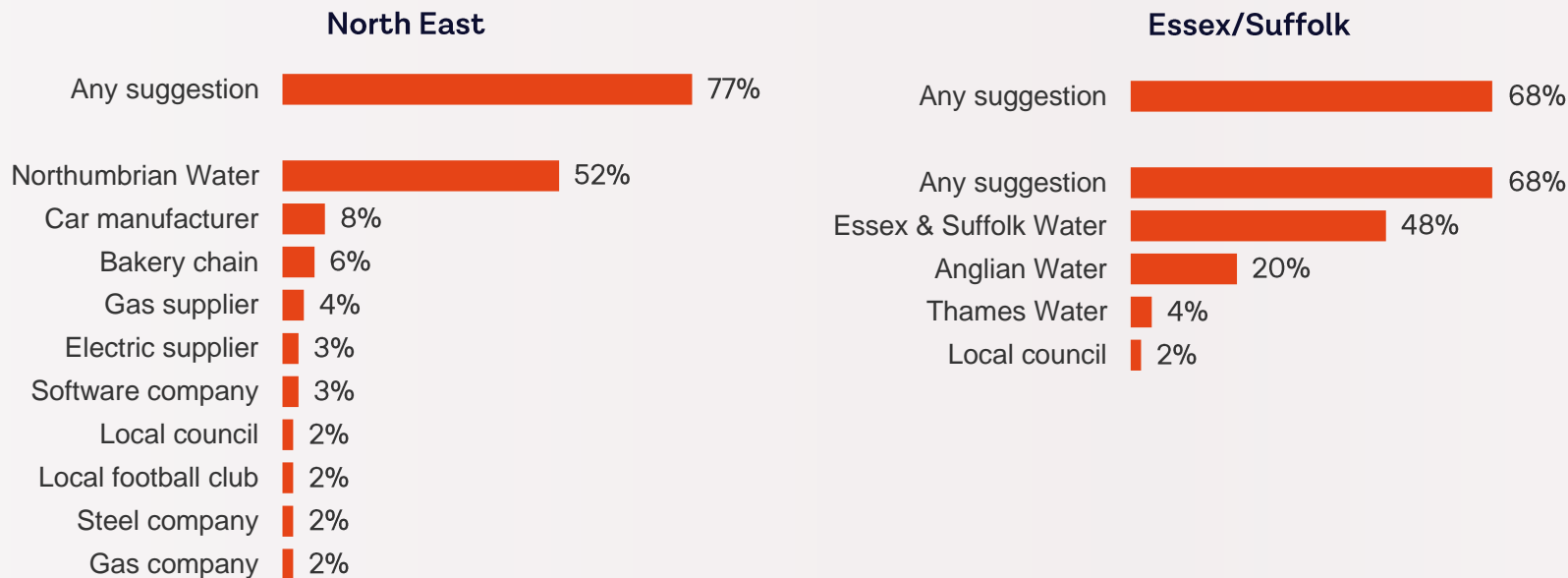
Brand recognition

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Brands associated with the area [unprompted]

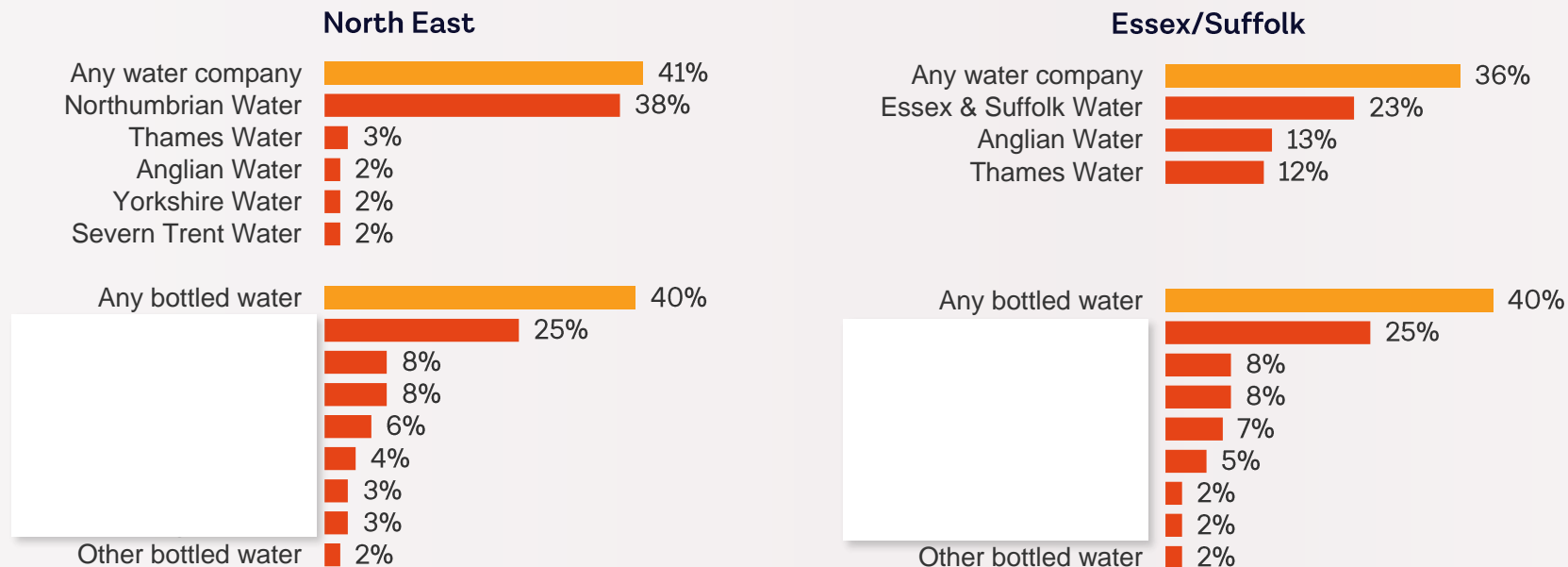
Similar to 2020, water companies score high



Q1. Which companies do you most associate with [the North East / Essex / Suffolk]? [unprompted] Base: All respondents NW Region (432), ESW Region (268)

Top of mind water brands

Customers in the North East are slightly more likely to think of a water company when asked about water brands



Q2. When you think of water, what brands come to mind? Base: All respondents NW Region (432), ESW Region (268)



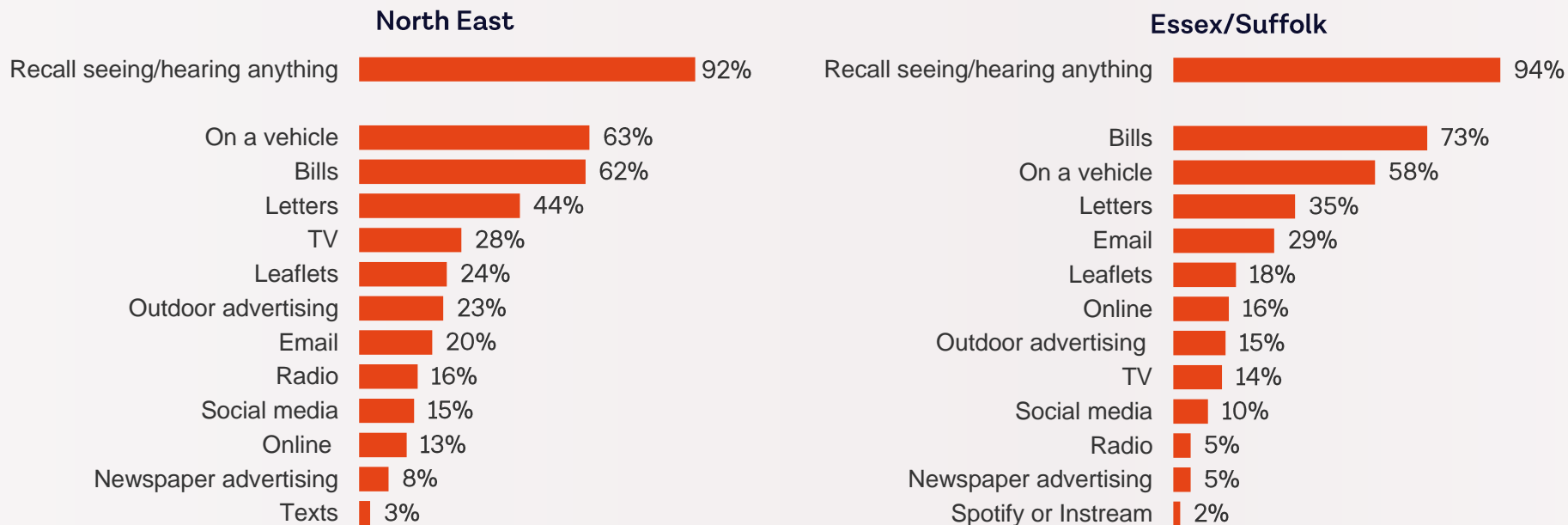
Comms recall

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Comms activity recall

Both NW and ESW customers are significantly more aware of comms activity than in 2020



Q9. Can you recall seeing or hearing anything about [Northumbrian Water / Essex & Suffolk Water] in the last 6 months or so, on any of the following?
Base: All respondents NW Region (432), ESW Region (268)



Customer service excellence

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Examples of excellent customer service

Those in the NW region are more likely to have contacted a water company in the past 3 months than those living in ESW (17% vs 11%)

When asked to think of an instance when you have experienced excellent customer service:

58% Could recall experiencing excellent customer service

15% in the North named Northumbrian Water

12% in the South named Essex & Suffolk Water

The main other categories of business mentioned were:

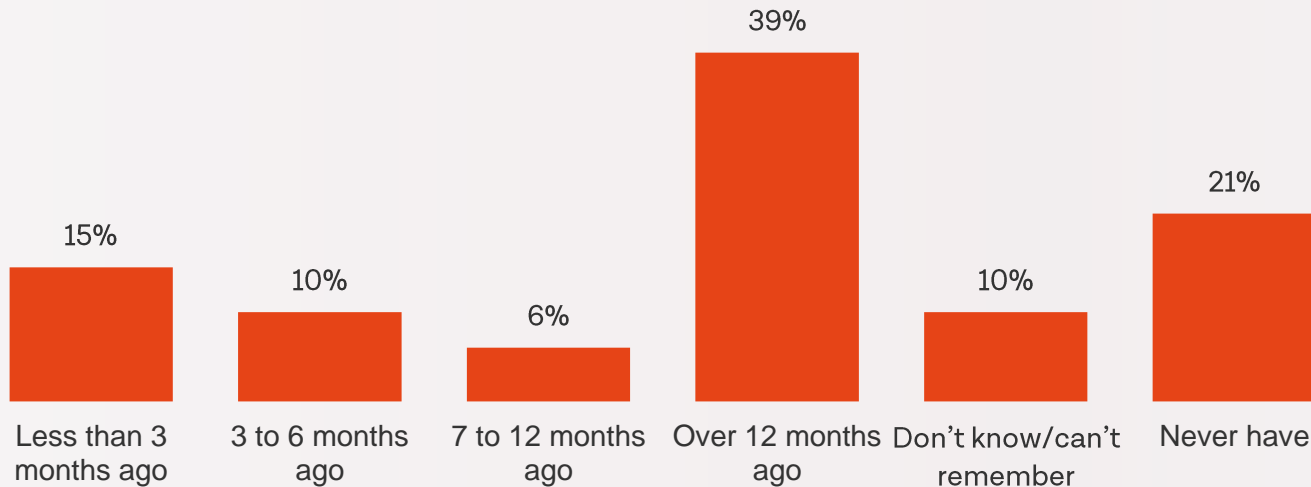
- Mobiles/phone/broadband
- Retailers (especially Amazon)
- Energy suppliers
- Financial services

Reasons for the service being classed as excellent were:

- **Speed of service** – prompt response to query/problem, quick at fixing issues
- **Friendly and helpful staff** – understand the needs of the customer, polite when dealing customers
- **Good communication** – constant information, good advice, quick to respond to emails/phone calls
- **Easy returns** – very easy to return items with no questions asked, quick refunds

Last contact with a water company

Those in the NW region are more likely to have contacted a water company in the past 3 months than those living in ESW (17% vs 11%)



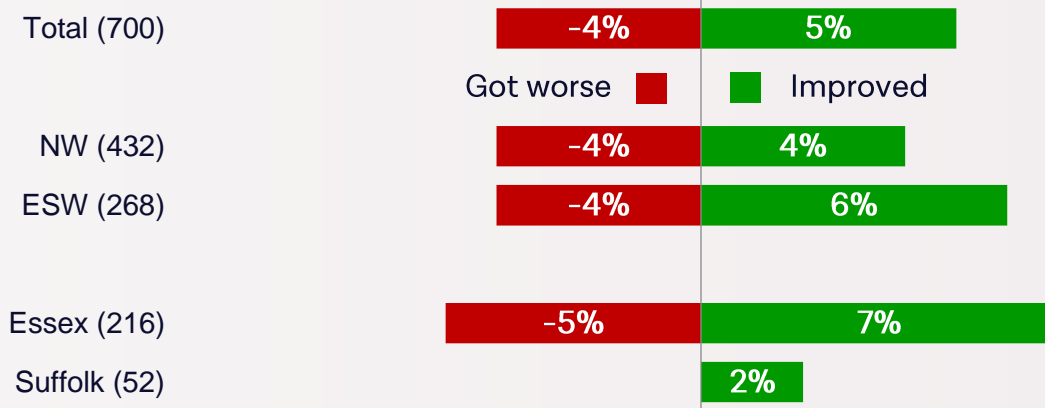


Overall satisfaction & perceptions

Opinion change

There have been no significant shifts in opinion over the last 12 months

Has your overall opinion of NW/ESW changed at all, over the last 12 months or so?

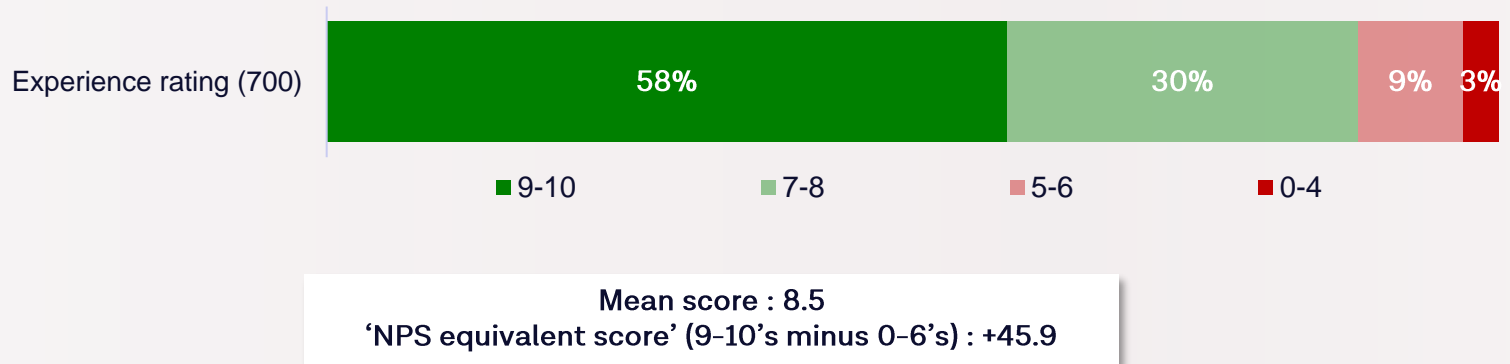


Q7. Has your overall opinion of NW/ESW changed at all, over the last 12 months or so? Base: All respondents

Overall experience

There has been a significant decrease in levels of satisfaction from 2020 to 2021 (from 54.1 to 45.9)

Using a scale of 10 to 0, where 10 is very satisfied and 0 is very dissatisfied, how satisfied are you with your experience of NW/ESW?



Q8. Using a scale of 10 to 0, where 10 is very satisfied and 0 is very dissatisfied, how satisfied are you with your experience of NW/ESW? Base: All respondents

Experience sub-sample differences

Differences in the 'NPS equivalent scores' for satisfaction with experience, by respondent sub-group, are listed below

Total (700)	45.9
NW (432)	51.1
ESW (268)	37.5
Essex (216)	39.7
Suffolk (52)	28.0
Direct debit (548)	44.3
Not (152)	51.7
Metered (437)	39.9
Unmetered (263)	55.8

Men (310)	39.7
Women (390)	50.8
16-44 (183)	45.4
45-64 (275)	47.4
65+ (239)	44.6
AB (202)	38.6
C1 (311)	45.3
C2 (75)	55.4
DE (108)	53.3

In vulnerable group (268)	49.8
Not (370)	45.1

On benefits (122)	57.9
Not on benefits (573)	43.5
Disability in household (198)	54.6
Not (494)	42.4

Last contacted NW/ESW:	
In last 3 months (102)	51.5
3-12 months ago (113)	45.5
Longer/don't know (340)	43.6
Never have (145)	47.5

Q8. Using a scale of 10 to 0, where 10 is very satisfied and 0 is very dissatisfied, how satisfied are you with your experience of NW/ESW? Base: All respondents

NPS



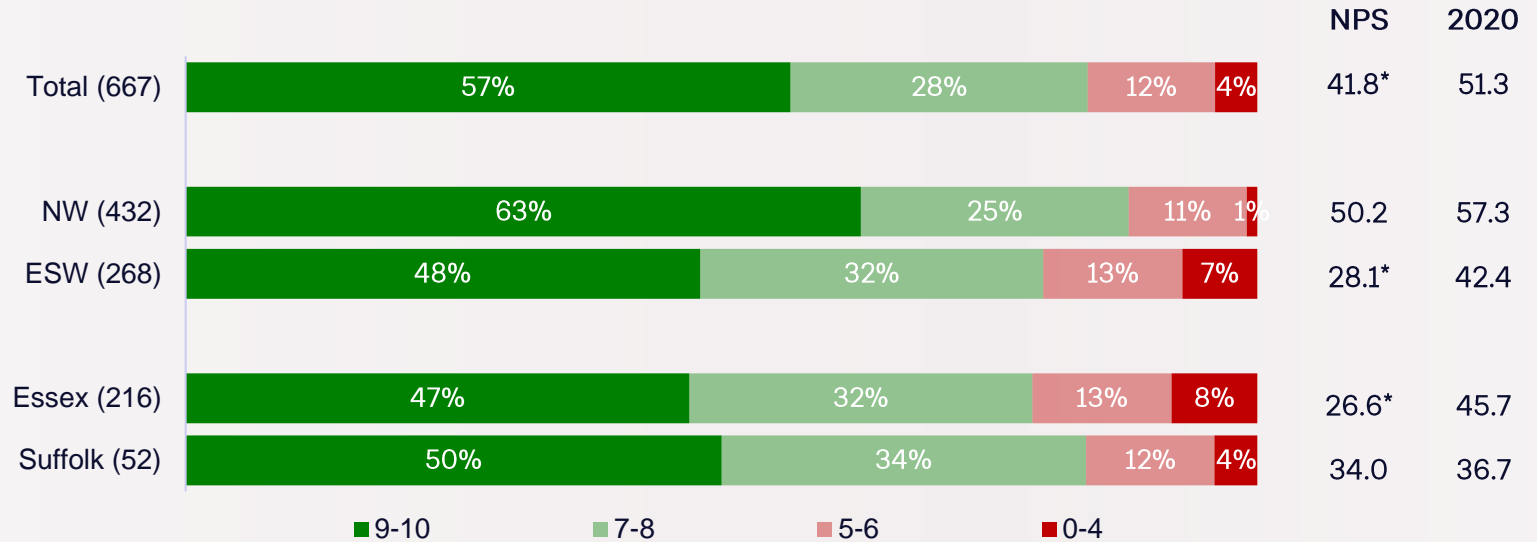
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NPS

The overall NPS this year has decreased significantly, driven by declines in scores in Essex specifically

Respondents were asked for scores out of 10 on likelihood to recommend NW/ESW:



* Significant change since 2020

Q19a. If people were able to choose their water and sewerage provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water] to a friend or colleague? Please use a scale of 10-0, where 10 is 'extremely likely' and 0 is 'not at all likely'. Base: All respondents

NPS sub-sample differences

Differences in NPS by respondent sub-group, are listed below

Total (667)	41.8
NW (414)	50.2
ESW (253)	28.1
Essex (203)	26.6
Suffolk (50)	34.0
Direct debit (518)	40.7
Not (149)	45.6
Metered (414)	34.1
Unmetered (253)	54.5

Men (293)	34.1
Women (374)	47.9
16-44 (179)	43.6
45-64 (266)	37.2
65+ (221)	45.7
AB (192)	29.2
C1 (294)	44.6
C2 (73)	47.9
DE (104)	52.9

In vulnerable group (255)	54.1
Not (357)	37.5

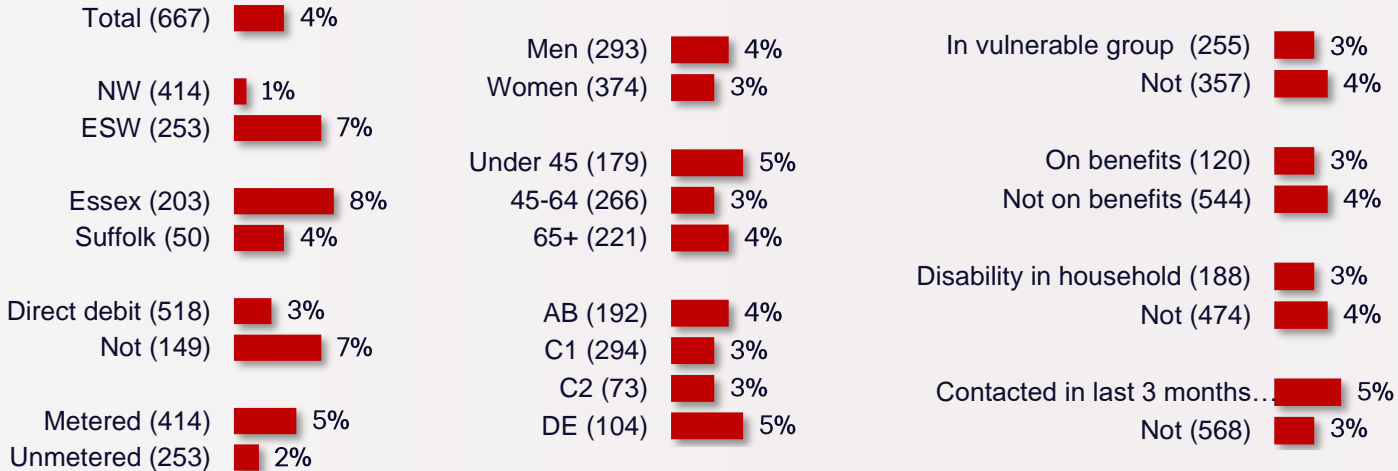
On benefits (120)	60.0
Not on benefits (544)	38.4
Disability in household (188)	59.6
Not (474)	35.2

Last contacted NW/ESW:	
In last 3 months (99)	43.4
3-12 months ago (108)	39.8
Longer/don't know (324)	43.8
Never have (136)	37.5

Q19a. If people were able to choose their water and sewerage provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water] to a friend or colleague? Please use a scale of 10-0, where 10 is 'extremely likely' and 0 is 'not at all likely'. Base: All respondents

Lowest propensity to recommend

Scores of 5-6 on the NPS scale are often not indicative of actively poor perceptions, but 0-4s generally are. Overall, 4% of customers gave a low score of 0-4 against likelihood to recommend NW/ESW if they had the choice of supplier. Proportions of 0-4 scores by sample sub-group are shown below



Q19a. If people were able to choose their water and sewerage provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water] to a friend or colleague? Please use a scale of 10-0, where 10 is 'extremely likely' and 0 is 'not at all likely'. Base: All respondents

Top reasons for NPS scores

9-10s (380)

- Had no problems – 52%
- Good customer service – 17%
- Happy with them/good experience – 16%
- Good quality water – 13%
- Reliable supply – 9%
- Good company – 9%
- Been with them a long time – 7%
- Good/fair prices – 7%

7-8s (186)

- No problems – 34%
- Good customer service – 13%
- Happy with them/good experience – 12%
- Reliable supply – 9%
- Good quality water – 8%

5-6s (77)

- Too expensive/comes down to cost – 12%
- Do not recommend – 12%
- Had no dealings/can't comment – 9%
- Okay/middle of the road – 5%
- Poor previous experience – 5%

0-4s (24)

- Do not recommend – 21%
- Poor water quality – 17%
- Poor previous experience – 13%

Most important improvement to raise score...

...to 7-8 (those giving scores of 0-6: 101 people)

- Cheaper/better value for money – 29%
- Reducing leakage/fixing leaks (quicker) – 11%
- Better water quality – 10%
- Investing in/improving the network – 9%
- More info on what the company does – 9%

...to 9-10 (those giving scores of 7-8: 186 people)

- Cheaper/better value for money – 27%
- Better water quality – 9%
- More info on what the company does – 6%
- Reducing leakage/fixing leaks (quicker) – 5%
- Investing in/improving the network – 4%



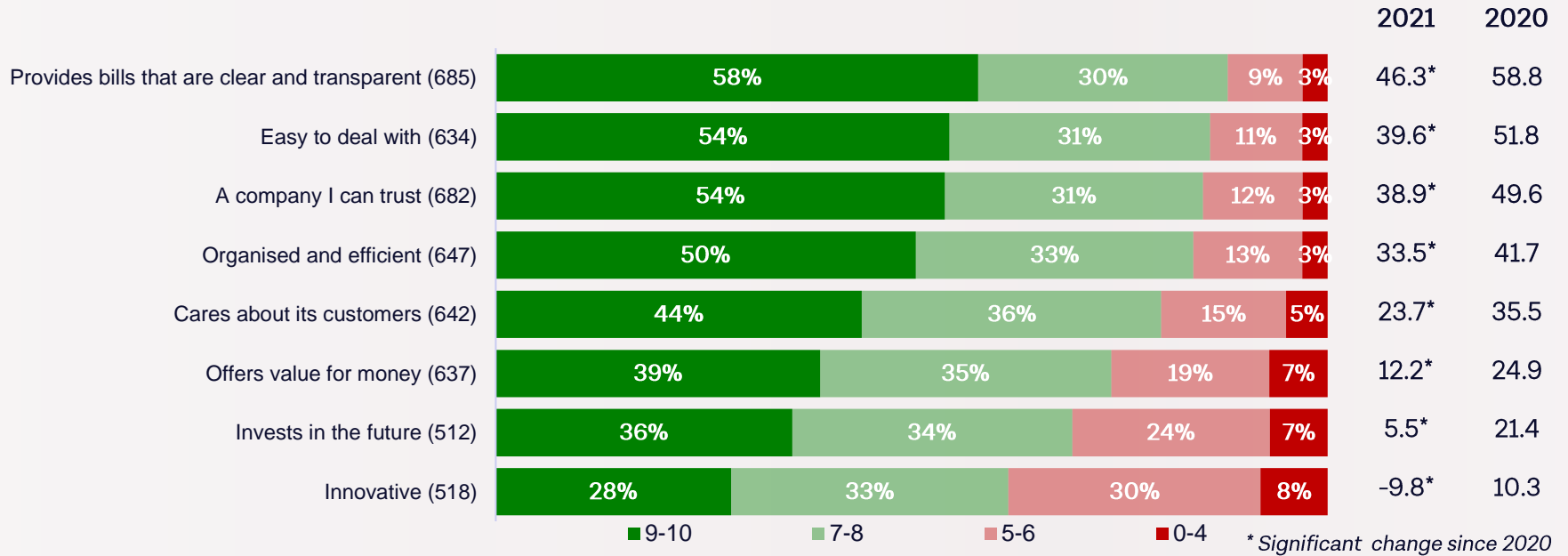
Impressions of the brand

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Brand values

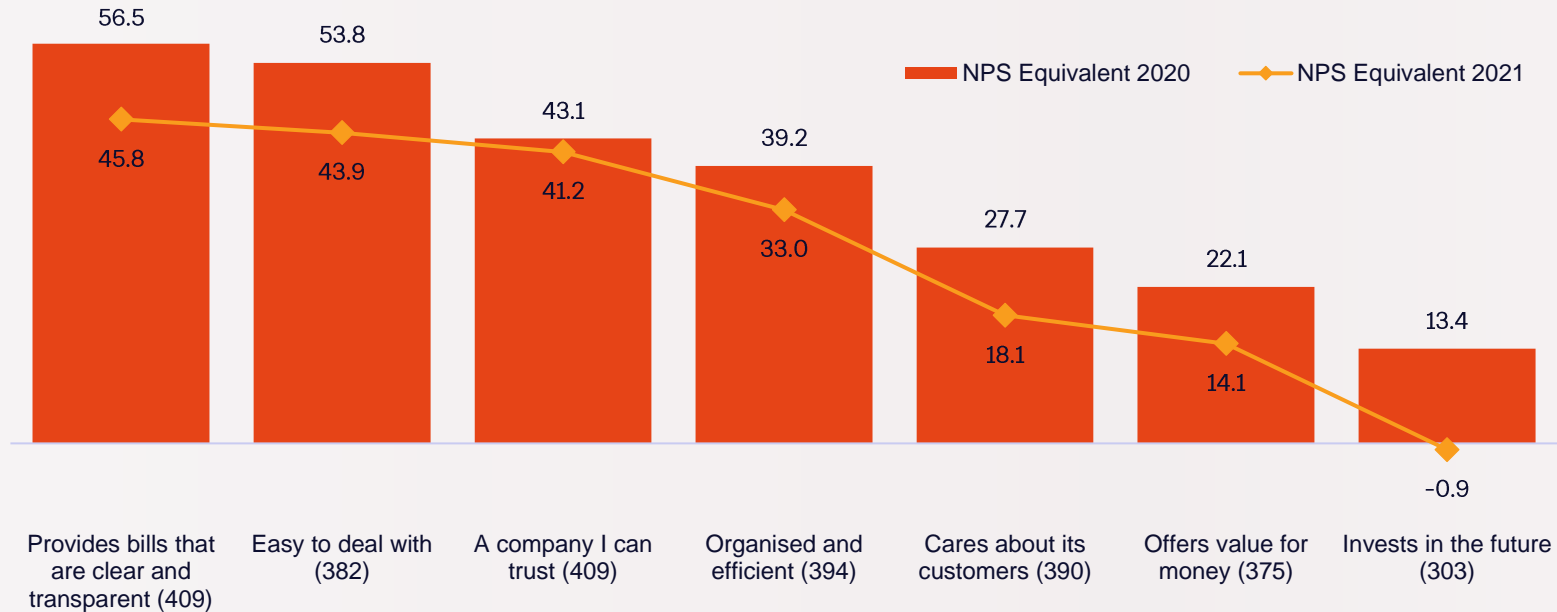
Scores given from 10-0 on each of these elements (10 being the most positive) were as follows:



Q10. From your own experience and impressions of [Northumbrian Water / Essex & Suffolk Water], to what extent do you agree or disagree with the following statements – where 10 is agree strongly and 0 is disagree strongly. Base: All respondents

Brand values - NW

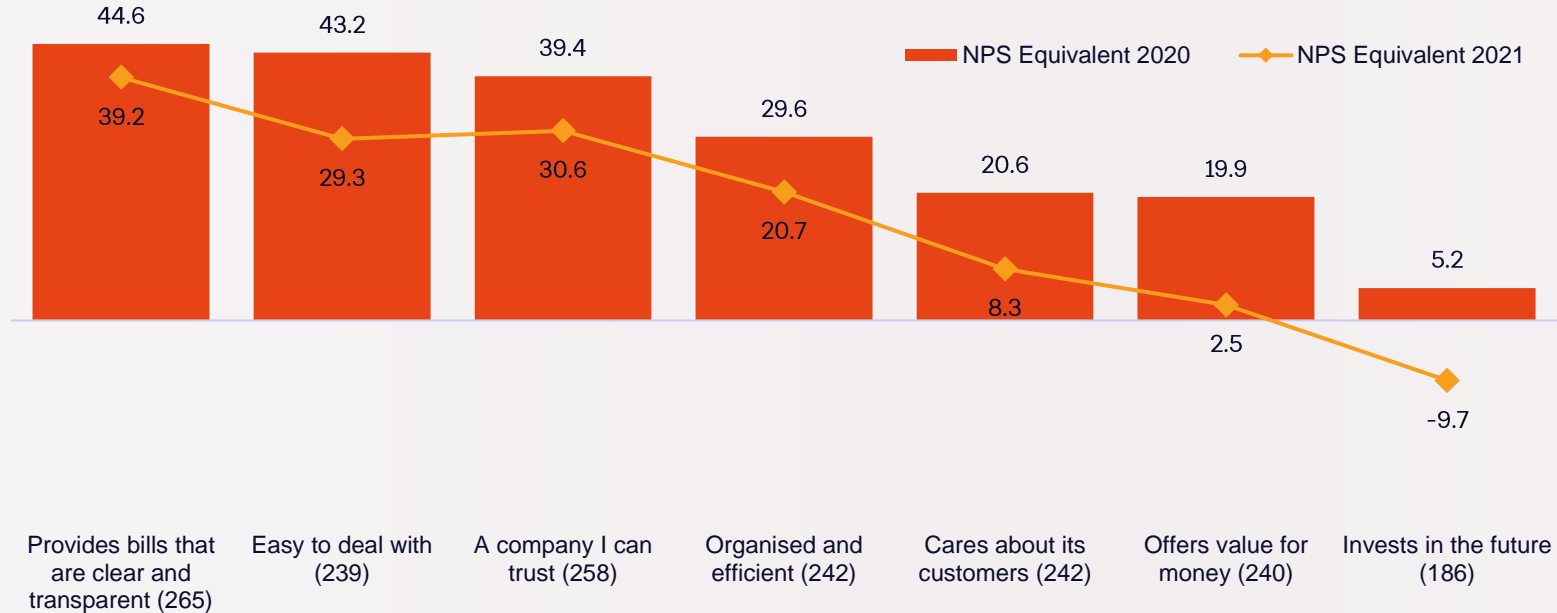
NPS equivalent scores for each element for Northumbrian Water were as below:



Q10. From your own experience and impressions of [Northumbrian Water / Essex & Suffolk Water], to what extent do you agree or disagree with the following statements – where 10 is agree strongly and 0 is disagree strongly. Base: All respondents

Brand values - ESW

NPS equivalent scores for each element for Essex & Suffolk Water were as below:



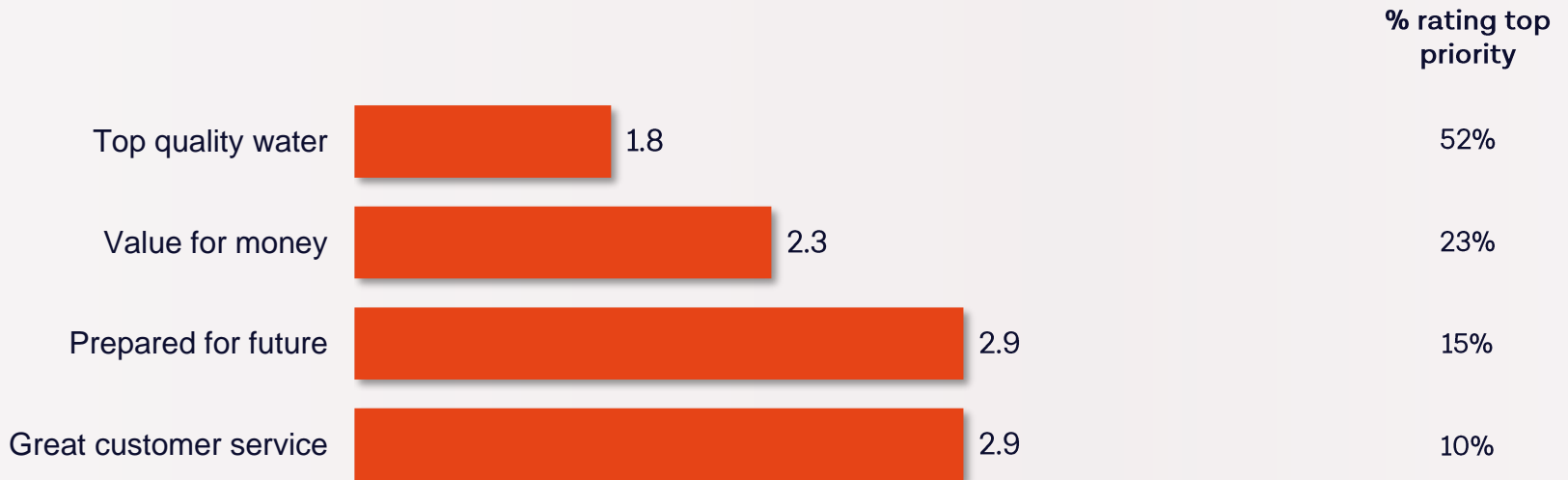
Q10. From your own experience and impressions of [Northumbrian Water / Essex & Suffolk Water], to what extent do you agree or disagree with the following statements – where 10 is agree strongly and 0 is disagree strongly. Base: All respondents



Customer priority areas

Ranking of priority areas

Customers have told [NW/ESW] that there are four priority areas that matter most to them - value for money, great customer service, top quality water, and being prepared for the future (eg having reliable, resilient infrastructure and service). Could you rank these four areas in terms of the priority that you would place on each one?

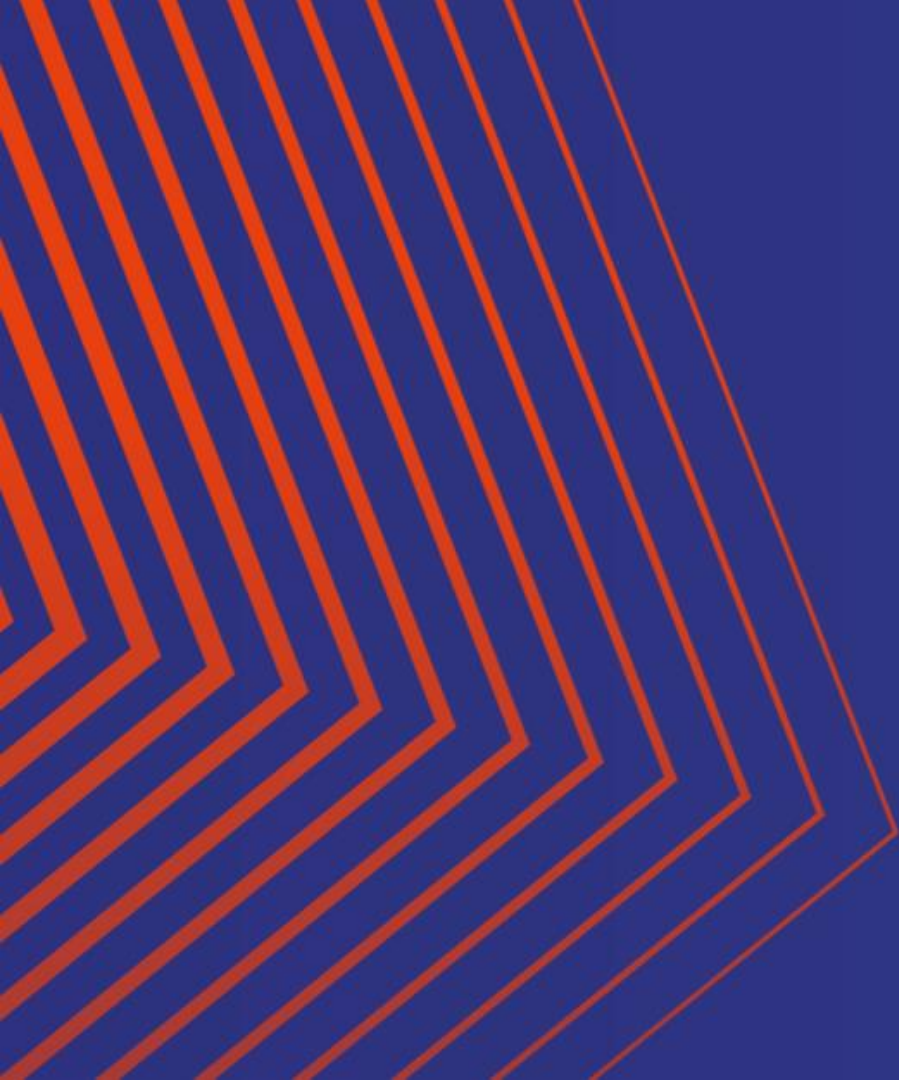


Q17. Could you rank these four areas in terms of the priority that you would place on each one? Which of them would be your top priority? Which second? And which third? Base: All respondents

Other priority areas

Do you think there are any other areas NW/ESW should focus on?

Being more environmentally friendly – 9%
Investing in/improving the network – 4%
Reducing leakage/fixing leaks (quicker) – 4%
Improving water quality – 3%
Reducing prices – 3%



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