

Brand Values 2022 Survey findings

NWG
25/10/22

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Introduction

Aim: understand what drives perceptions of the brand, and how it is seen by customers

Carried out by phone – 500 achieved

Sample is NWG customers provided by NWG,

Gender and age in proportion to local population

Fieldwork dates: 20th September – 19th October 2022

Average interview length: 14 minutes

Location	Interviews
North	319
Essex	146
Suffolk	35
TOTAL	500

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 14 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



Headlines

Brand recognition

As in previous waves, when asked which companies are most associated with their region, 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). As seen last year, NW has a clearer stand out in comparison to other water companies. Meanwhile, ESW has similar association to other water companies, but still placing ahead.

Customer service excellence

Around two thirds of respondents recall experiencing excellent customer service. 16% in the North naming NW and 13% in the South naming ESW. Like last year, mobile and broadband brands, retailers and energy suppliers were noted. Under a fifth have contacted a water company less than 3 months ago, with those in the ESW region more likely to have never contacted a water company.

Headlines

Overall satisfaction/perceptions

In both NW and ESW regions, 4 in 5 have positive perceptions of the brand. Those on benefits are particularly more likely to have a positive perception (90%). The reasons for these positive perceptions are primarily due to having had no problems and having a reliable supply. Improvement in opinion change seems to come mainly from the ESW region.

Brand attributes

There have been some significant increases since 2021. Providing bills that are clear and transparent is rated the highest and has seen a significant increase. Innovation remains the lowest, despite seeing a significant increase.

Customer priority areas

Exactly half of customers rank top quality water as the primary priority for the business, with a quarter stating it's value for money.

Respondents and their households



Demographics and billing profile

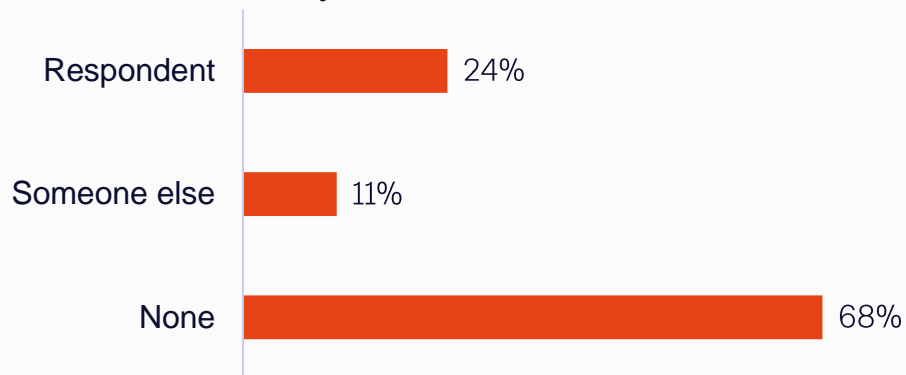
The sample profile this year is quite similar to that achieved on the previous wave of this survey, carried out in 2021

Sample profile	Total	NW	ESW
Male	48%	48%	47%
Female	52%	52%	53%
16-34	10%	10%	11%
35-44	15%	16%	14%
45-54	23%	21%	25%
55-64	19%	19%	19%
65+	32%	33%	30%
AB	24%	22%	27%
C1	41%	39%	45%
C2	14%	14%	13%
D	9%	11%	5%
E	12%	13%	9%
Information refused	1%	1%	0%

Billing profile	Total	NW	ESW
Metered	64%	55%	79%
Not metered	36%	45%	21%
Direct debit	77%	80%	71%
Not direct debit	23%	20%	29%

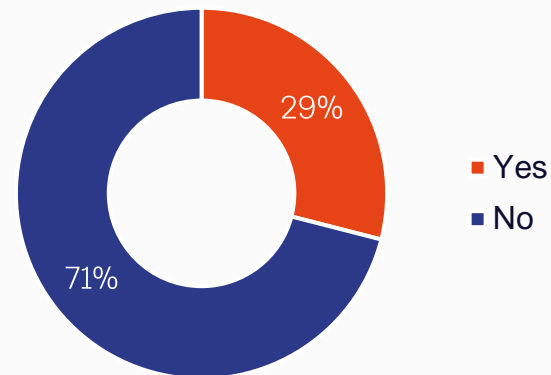
Disability and benefits

Over a third of 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, and is highest amongst the DE socio economic group with just under half impacted by an illness or disability.

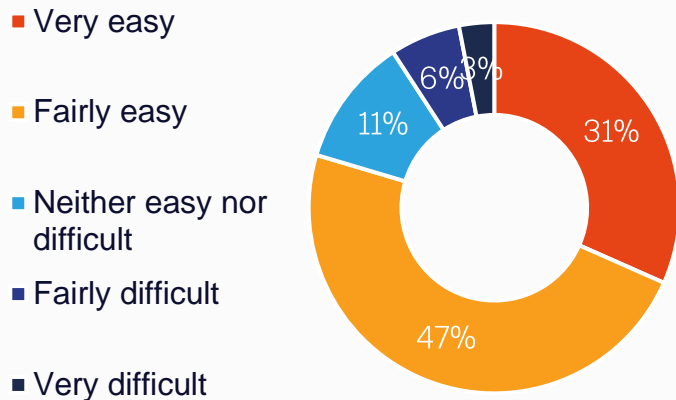
Over a quarter of households are in receipt of income support or any other benefits



As seen in previous years, women are significantly more likely to receive income support than men (40% vs 17%). Over half of the DE socio economic group are on benefits.

Ease of understanding bills, and overall vulnerability

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



45% 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)

Females (12%), those on benefits (18%), and those classed as vulnerable (20%) find it more difficult to understand bills and official documents

Brand recognition

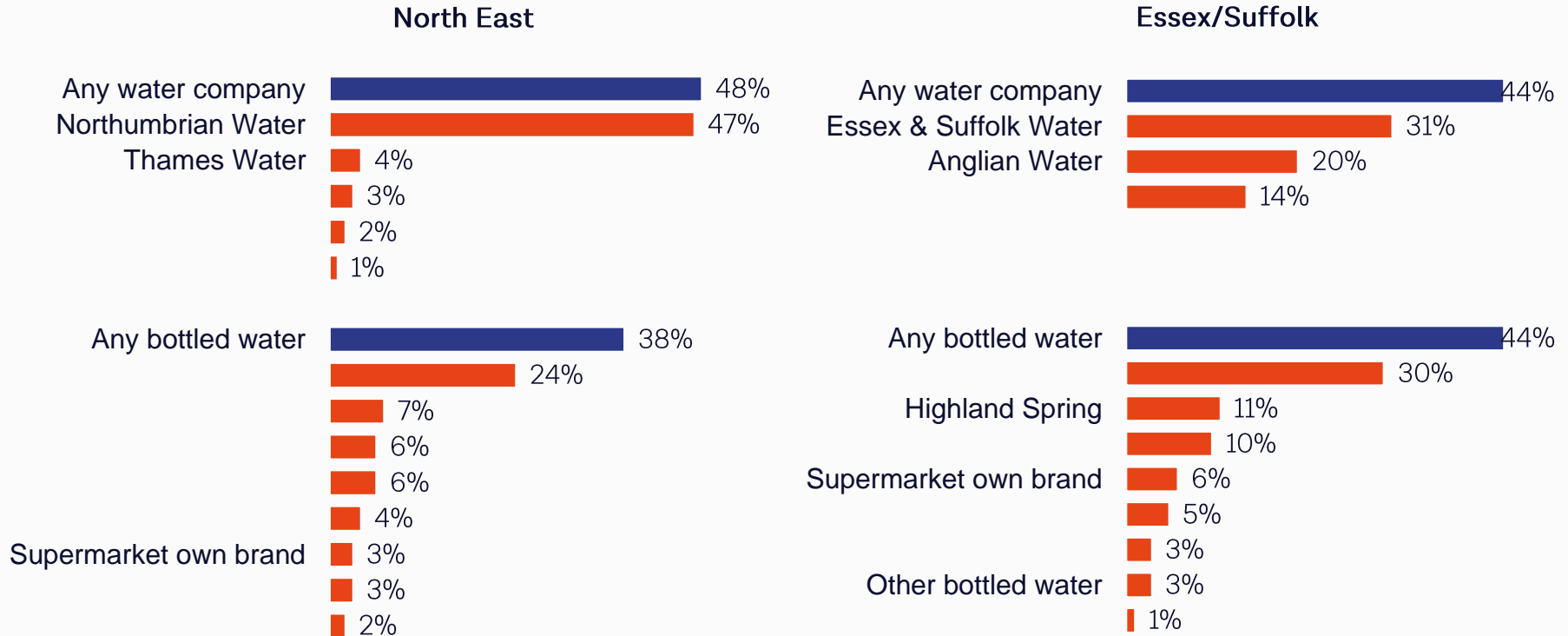


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Top of mind water brands

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



Customer service excellence



Examples of excellent customer service

Nearly two thirds recall experiencing excellent customer service

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

64% Could recall experiencing excellent customer service

16% in the North named Northumbrian Water

13% in the South named Essex & Suffolk Water

Reasons for the service being classed as excellent were:

Speed of service – they are quick to resolve issues and any queries

Friendly and helpful staff – pleasant attitudes and welcoming

Good communication – keep customers in regular contact, and keep them updated on a regular basis

The main other categories of business mentioned were:

Mobiles/phones/broadband

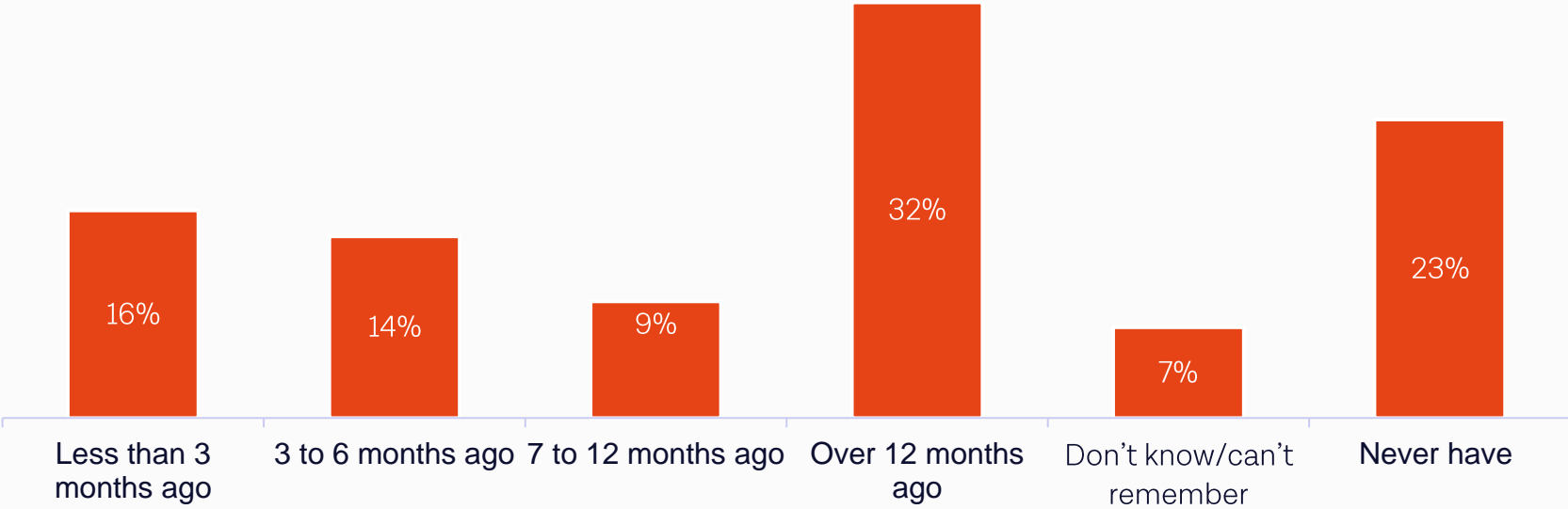
Retailers (especially supermarkets)

Energy suppliers

Financial supplier (including banks)

Last contact with a water company

Those in the ESW region are more likely to have never contacted a water company those living in NW (28% vs 20%)



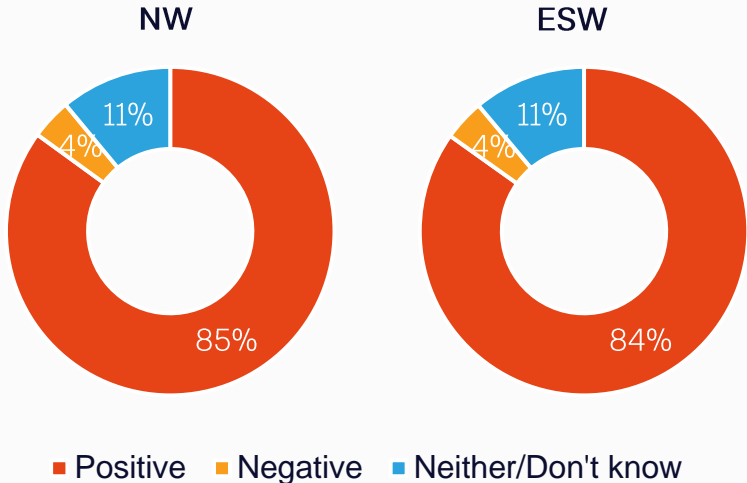
Q4. When did you last have any contact with [Northumbrian Water / Essex & Suffolk Water] – apart from receiving a bill? Base: All respondents (500)

Overall satisfaction & perceptions



Perceptions of NW/ESW

In both regions, the vast majority have positive perceptions



■ Positive ■ Negative ■ Neither/Don't know

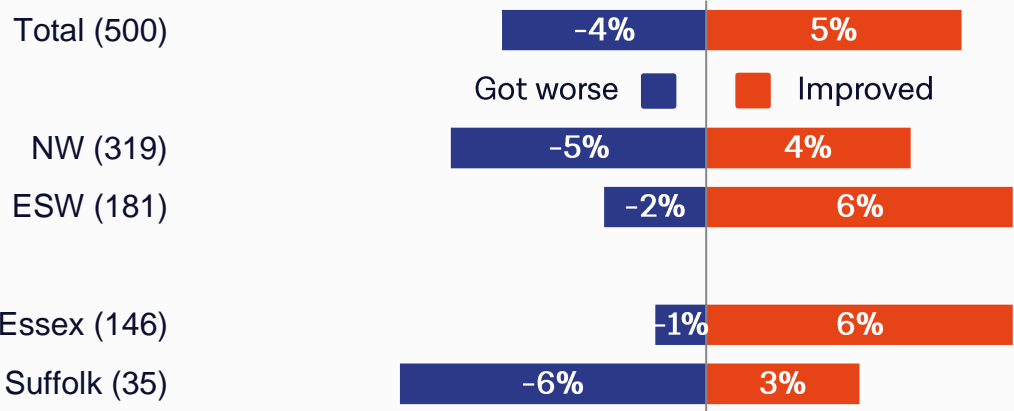
Those on benefits are more likely to have a positive perception (90%)

Positive...		Negative...	
No problems	35%	Too expensive/prices increases	19%
Reliable supply	12%	Slow to fix/respond to issues	14%
Proactive communication/keep you informed	12%	Poor water quality	14%
Quick response	10%	Poor experience/previous experience	14%
Helpful	9%	Do more for the environment/end pollution in rivers/seas etc	14%
Bills are clear/understandable/good billing procedure	9%	Problem reoccurred/needs permanent solution	10%
Good customer service/good service	7%	Poor service	10%
Handle issues well/responsive	6%	Need to invest/maintain infrastructure – too many leaks	10%

*All other answers <6%

Opinion change

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



Q7. Has your overall opinion of [Northumbrian Water / Essex & Suffolk Water] changed at all, over the last 12 months or so? Base: All respondents (500)

Brand attributes

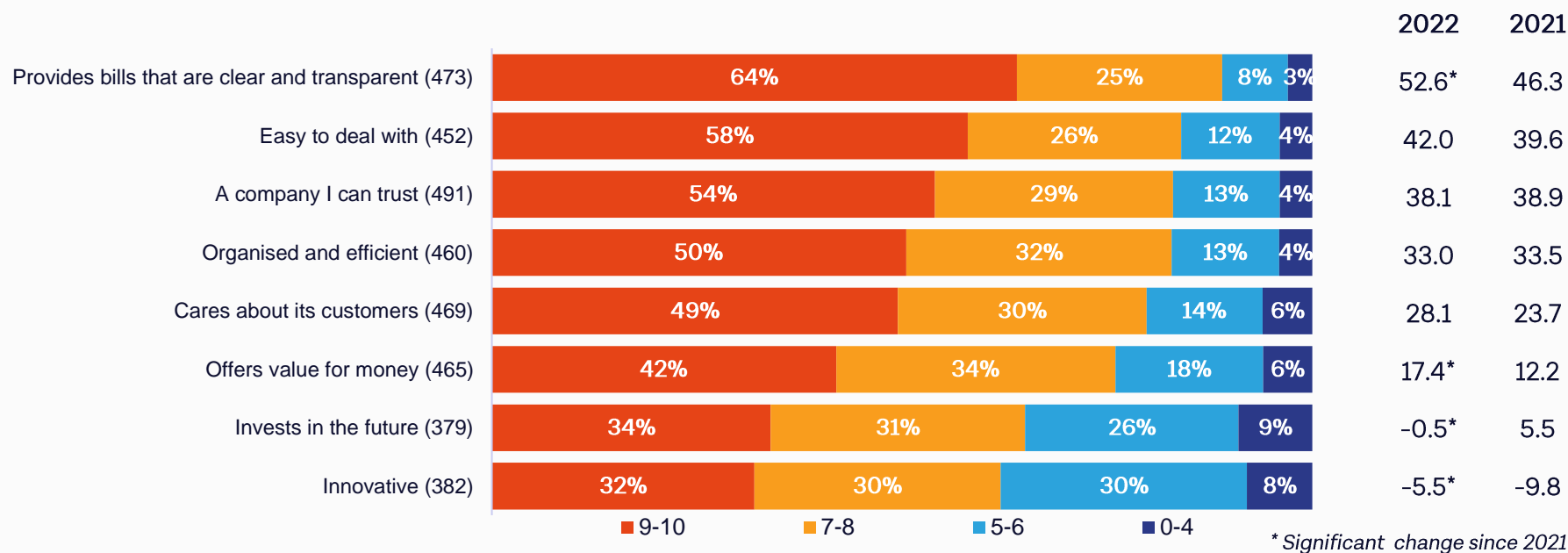


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Brand values

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 (500)

The bills don't increase over the last 2 years, they have stayed consistent, they don't scam you with emails.
(9-10)

Because every time I've had a problem, they've helped as much as they could. They are very easy to deal with.
(7-8)

I found them helpful as they reduced the bill to do with my partners disability, but with leaks they need to sort quicker instead of threatening a hose pipe ban
(5-6)

Think just past experience with them, two occasions had burst waterpipes and both occasions hard to contact, hard to get any answers and not very good customer service
(0-4)

The suppliers are actually fine, if any work is carried out in my area, they always let me know before hand, it never seems to be long and service is normally resumed quickly
(9-10)

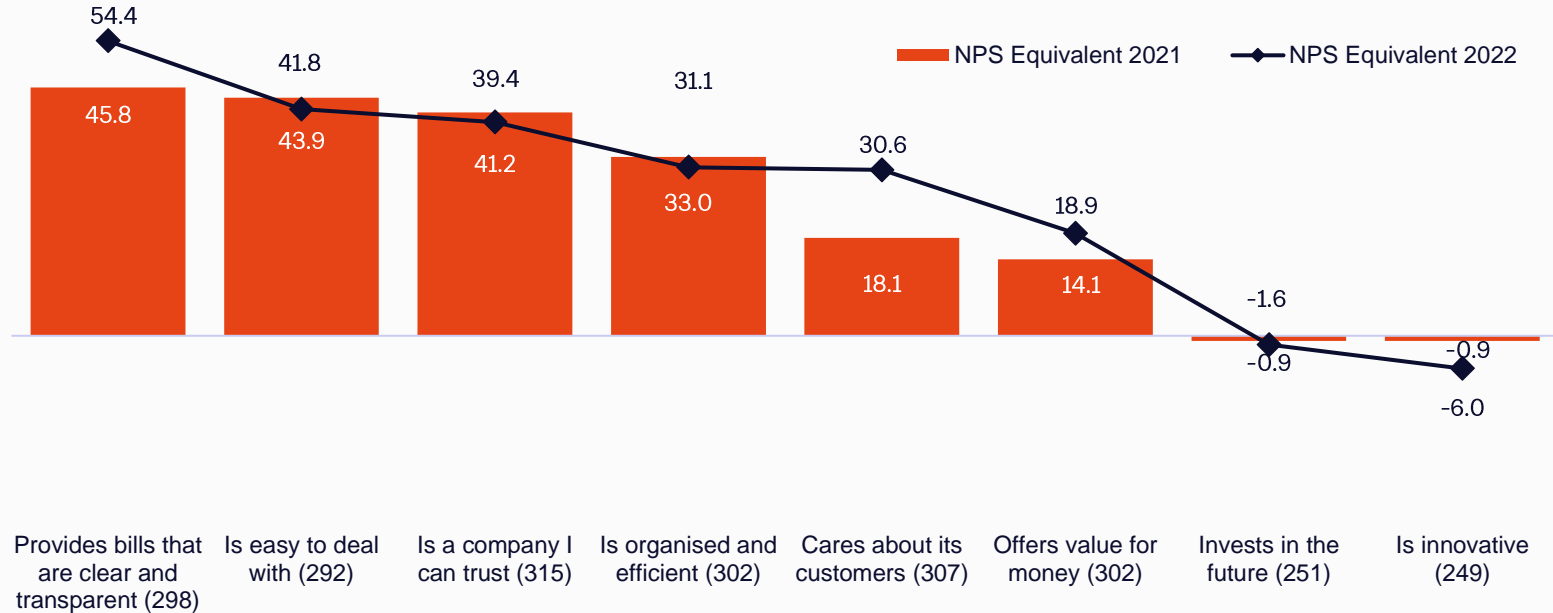
Customer service has always been good but sometimes it's hard to get through. Their website is fine and when I've had a few issues they helped sort it out. All good.
(7-8)

I had a leak and it took them a long time to get them to come out, many months, but once they were here it was a positive outlook and I was reimbursed so much money
(5-6)

We only get a bill once a year and don't get too much of an explanation to where the money is going. I've had problems in the past with direct debits, taking over payments and they were hard to get hold of when I needed to sort that out, that was 10 years ago though and in the last 5 years I've had no issues
(0-4)

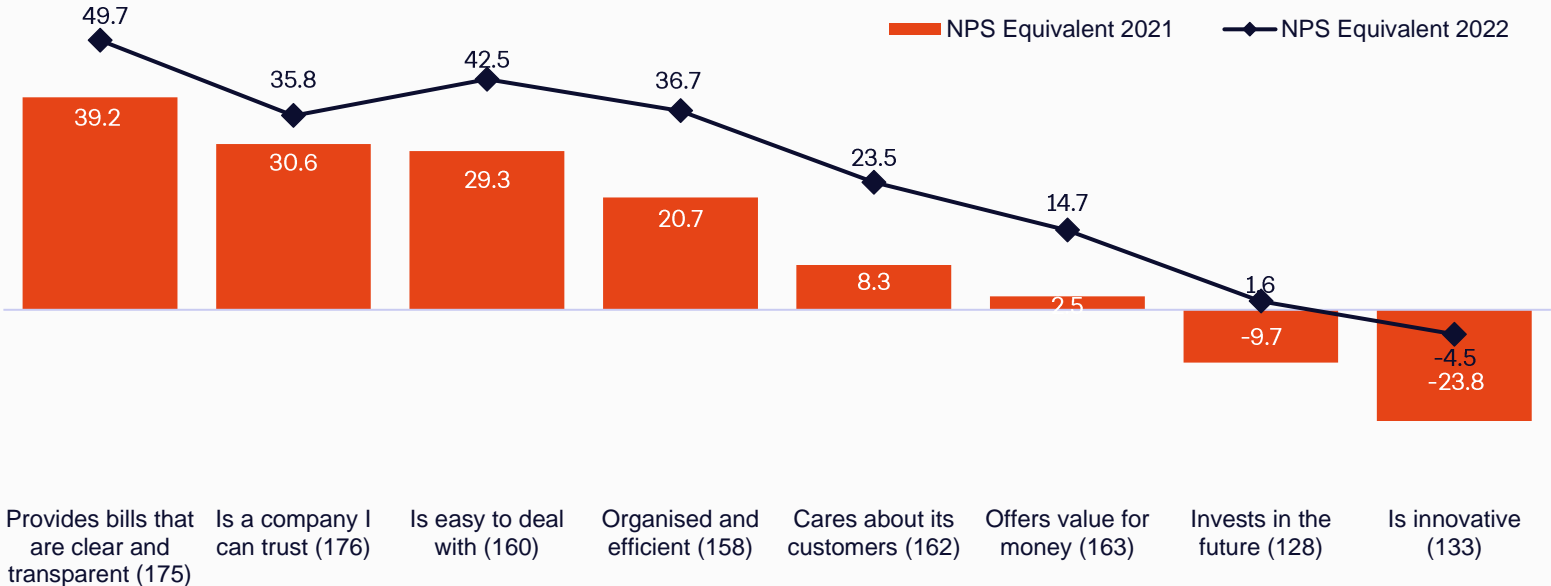
Brand values - NW

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



Brand values - ESW

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



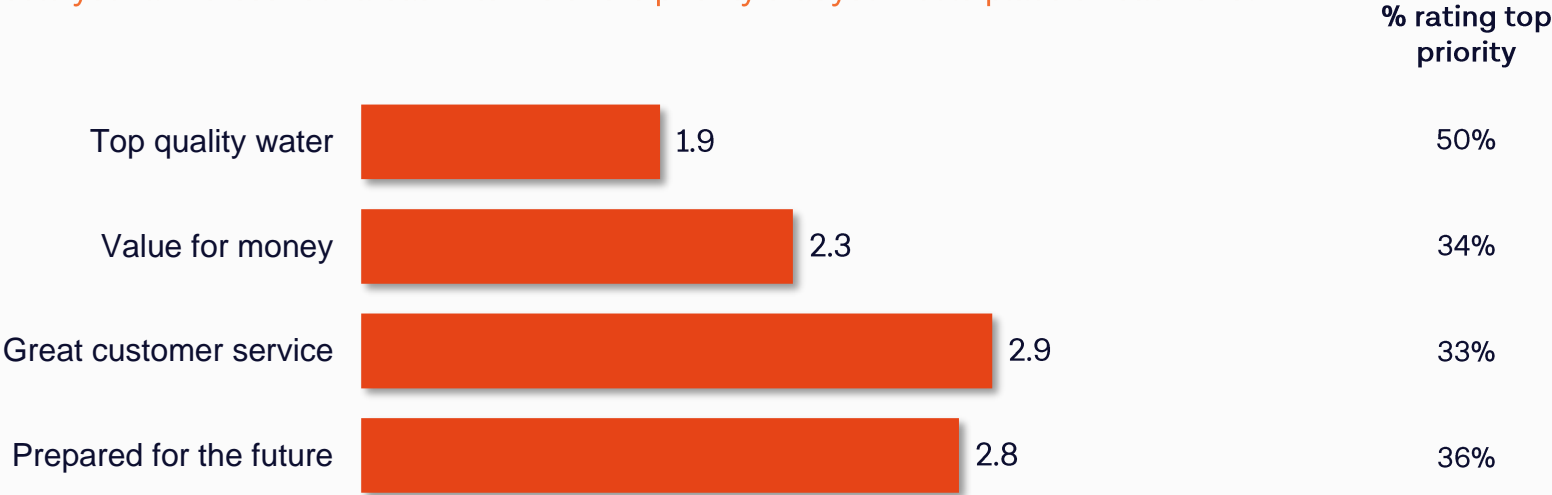
Q10. From your own experience and impressions of [Northumbrian Water / Essex & Suffolk Water], to what extent do you agree or disagree with the following statements – where 10 is agree strongly and 0 is disagree strongly. Base: All respondents (500)

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? Which third? Base: All respondents (500)

Other priority areas

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

Reducing leakage/fixing leaks (quicker)	9%
Being more environmentally friendly	6%
Investing in/improving the network	4%
Reducing prices	3%
More information/promotion on what the company does	3%
Improving water quality	2%
River/sea water quality	2%

*All other answers <2%

The image features a dark blue background with a gradient that transitions to a bright orange at the bottom right. 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 bold, sans-serif font. The text is positioned within one of the white circles.

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