



NWG

Domestic Q1 2020 – Executive summary

Research report March 2020

Executive summary

NPS

Q1 2020 NPS		
Overall (483)	Northumbrian Water (294)	Essex & Suffolk Water (189)
43	53	28

Each phase, customers are asked how likely they would be to recommend Northumbrian Water / Essex & Suffolk Water to a friend or colleague. This question is used to calculate the NPS score, a key measure of customer advocacy. Overall NPS in Q1 2020 was +43, an increase of 7 from Q4 2019.

Consistent with previous phases, Northumbrian Water (+53) scored higher than Essex & Suffolk Water (+28). Please note that Northumbrian Water recorded a higher score than any quarter in 2019 while Essex and Suffolk recorded a lower score than any quarter in 2019.

Detractors cited perceptions of expensive and increasing bills as the key reasons for giving a low likelihood to recommend score. Promoters highlighted having no issues and being happy with the service they received as key reasons for giving a high score for likelihood to recommend.

Satisfaction

Q1 2020	
Value for money (501)	Overall satisfaction (501)
8.3	8.7

Satisfaction with value for money obtained a mean score of 8.3 out of 10; this increased for the second consecutive phase (+0.2 compared to Q4 2019). The score for overall satisfaction also increased this phase (+0.2).

All respondents were asked if their satisfaction levels had increased, decreased or stayed the same in the last 12 months; overall 3% of respondents said that their satisfaction with NWG had decreased in the last year, while 6% said it had increased.

Across both operating areas bill increases were the main reason respondents said their satisfaction had decreased.



Aspects of service

Q1 2020	
Aspect of service	Overall mean score
Supplying clean and clear drinking water (500)	9.0
Supplying drinking water that tastes and smells good (500)	8.9
The quality of seawater in bathing areas (NW only) (300)	8.5
The quality of river water (NW only) (300)	7.6
Customer service (500)	8.9
Providing a reliable supply of water (500)	9.3
Providing sufficient pressure (500)	9.0
Providing a sewerage service that deals effectively with sewage in heavy rainfall (NW only) (300)	8.7
Providing a clear explanation as to what charges cover (500)	8.7

Respondents were asked how satisfied they were with a range of aspects of service on a scale of 1 to 10 where 1 was equal to 'very dissatisfied' and 10 was equal to 'very satisfied'.

For both Northumbrian Water and Essex & Suffolk Water (NW/ESW), 'providing a reliable supply of water' (9.3) remained the highest scoring aspect of service this phase. This was consistent with scores obtained throughout 2019.

Areas of lower satisfaction were in line with previous phases with 'quality of river water' (7.6) and 'quality of seawater in bathing areas' being the lowest (8.5) (please note these areas are asked to Northumbrian Water customers only). Although quality of seawater remained one of the lower scoring areas this increased from the previous phase (+0.3) and was higher than the year to date score for 2019 (8.3).

This quarter, Northumbrian Water consistently scored higher than Essex & Suffolk Water on all aspects of service, which was consistent with the relationship seen in year to date scores for 2019.



Drinking water

Q1 2020 (490)	
Tap water	Bottled water
77%	22%

This phase, 77% of respondents preferred to drink tap water over bottled water, with a higher percentage preferring this in the Northumbrian Water operating area than in Essex & Suffolk Water (80% and 72% respectively).

Awareness of PSR services

Q1 2020	
Heard of additional support services (500)	Heard of financial support services (500)
54%	47%

This quarter, a majority of respondents felt NW/ESW services were easy to access (89%), with this being slightly higher for Essex & Suffolk Water than Northumbrian Water (91% and 87% respectively).

Over half (54%) of the respondents surveyed were aware of the additional support services NW/ESW offered and 47% had heard of the financial support services. Consistent with the previous phase, a higher proportion were signed up to the financial services than additional support services (9% and 2% respectively).



Trust and innovation

Q1 2020	
NW/ESW is a company that is trusted (500)	NW/ESW is an innovative company (500)
8.9	8.1

This quarter, respondents gave a score of 8.9 for trust in NW/ESW which was higher than the previous quarter (+0.3) and year to date scores for 2019 (+0.1).

NW/ESW being an innovative company scored 8.1, consistent with year to date scores for 2019 but a decrease from the previous quarter (-0.2).

Across both operating areas, having no issues, being generally happy with the service and receiving a good quality of supply were key reasons why respondents said they trusted NW/ESW.

Respondents highlighted in both NW and ESW that they had not seen or heard any information about innovation by the organisation.

Summary of key results

NPS

- NPS was at +43 overall this quarter, with this being higher for Northumbrian Water (+53) than Essex & Suffolk Water (+28).
- The overall NPS score was higher than at any point in 2019.
- This quarter, detractors cited increases in bills and high prices in general as the main reason for giving a low advocacy score.



Satisfaction

- Both overall satisfaction and satisfaction with value for money increased by 0.2 this phase.
- For both overall satisfaction and value for money, Northumbrian Water scored higher than Essex & Suffolk Water this phase which was consistent with 2019 year to date scores.
- 3% of respondents said that their satisfaction with NWG had decreased in the last year, with price increases highlighted as the key reason for the third consecutive quarter.

Satisfaction with aspects of service

- Providing a reliable supply of water (9.3) was the highest scoring aspect of service, which was consistent with year to date scores for 2019.
- The lowest scoring aspect was quality of river water (7.6), again this was consistent with 2019 year to date scores. Please note this was asked to Northumbrian Water respondents only.
- 93% of respondents felt that they had all the information they wanted to feel informed about their water (and sewerage) services, consistent with 2019 year to date scores.

Drinking water

- Over three quarters (77%) of respondents said they would choose to drink tap over bottled water.
- This was a slight dip in this metric from Q4 2019 (-1%), however it was higher than year to date scores for 2019 (+2%).

Awareness of priority services

- Most (89%) of respondents said NW/ESW services were easy to access.
- 54% of respondents had heard of the additional support services NWG offered, though just 2% of respondents had subscribed to these services.
- 47% of respondents had heard of the financial support services offered by NW/ESW; 9% were subscribed to them.



Recommendations

- Price was the key reason highlighted by detractors (those unlikely to recommend you), as well as being the main reason respondents cited for a decrease in satisfaction in the last year. In addition, value for money obtained scores demonstrating amongst the lower levels of satisfaction. Therefore, engaging and communicating with customers to change awareness and perceptions around pricing will be key to increasing satisfaction scores, for example look to ensure they are aware that prices are decreasing across the country.
- Awareness of support services and financial services as well as uptake of these services remains low. Look at alternative strategies to promote these services amongst customers who could benefit from them (such as those who have identified they aren't currently aware of them but would like to know more), as well as routes for these customers to access them; this may help to increase awareness, uptake and thus satisfaction amongst this customer group.
- Look to understand the fall in preference for drinking tap water over bottled in the ESW area, either by reviewing internal quality data to identify any changes there which could suggest the result is anomalous, or by further deeper engagement on the topic with customers in the operating area to understand the drivers for their behaviours.
- Quality of river water remains a low scoring aspect in the Northumbrian Water region. Disseminating information on what Northumbrian Water do to maintain the quality of river water could help to improve customer perceptions and thus potentially improve satisfaction with this aspect of service. For example, this could include raising awareness of your Water Rangers initiative and the role of these individuals, as well as sharing case studies on success stories witnessed locally to demonstrate the impact of the scheme.



