



17 / 03 / 21

Domestic Tracker Results: Quarter 1 2021

Our ref. J3065.4



DEFINING THE **CLEAREST** DIRECTION

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Domestic Tracker

On-going research programme among household customers, to monitor satisfaction with and perceptions of their water (and sewerage) service

Covering:

- 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

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Approach

Carried out by phone
500 interviews per quarter
Sample provided by NWG
and TPS-screened before
use

Quotas set to achieve:

- 316 NW, 184 *
- Gender and age to
match the population

Qtr4 2020

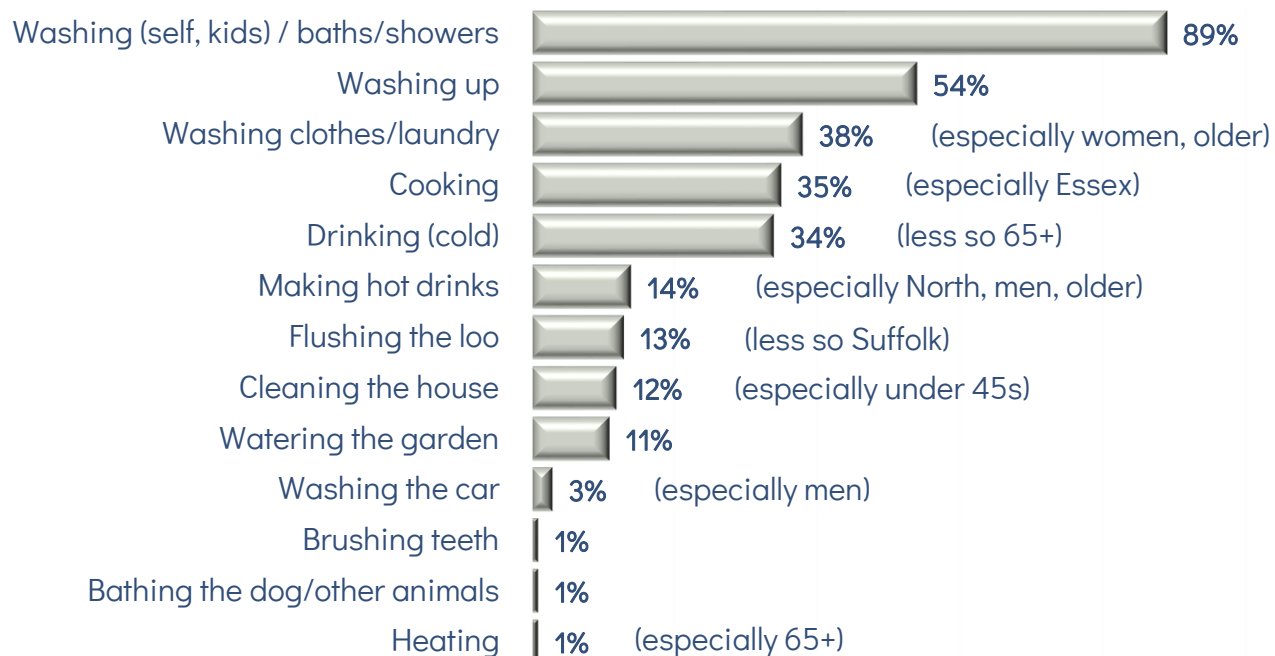
Fieldwork carried out:
11 February – 5 March 2021

- * Quotas changed this quarter,
to reflect the customer
population more closely:
- 63% North
 - 31% Essex
 - 6% Suffolk

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

(New question added this quarter, to encourage respondents to think about the value of water, when they are answering the survey questions)





Significance testing

For each question, differences between the results obtained on the latest survey wave and previous waves have been tested for statistical significance, at the 95% level.

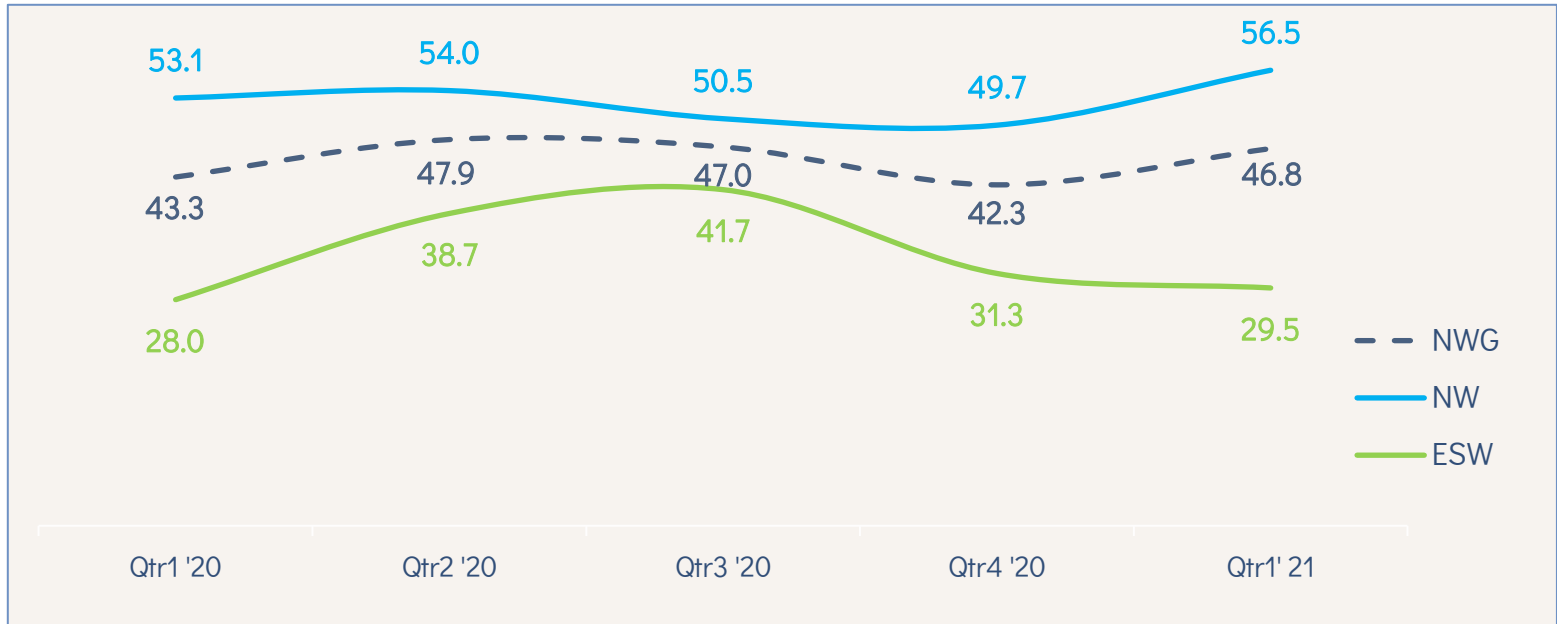
If a result this quarter is significantly different to any previous quarter, then the **significantly higher** result is shown in this report circled in green, and the result it is significantly **higher than** is shown circled in red.

Where differences are circled in this way, that indicates what is likely to be a real change in perceptions. Where they are not circled, even if they look fairly large, we cannot be confident that the differences are down to anything other than sampling effects.

Note that a result can be significantly different to more than one other result, so there can be more than one red or green on a line.



NPS since this quarter last year



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Top reasons for NPS scores this wave

Promoters (scores of 9-10) - 290 customers

- No problems (56%)
- No supply problems (13%)
- Good customer service (13%)
- Good communication/updates (11%)
- Been with them for years (11%)
- Good experience/happy with them (11%)
- Quick response/resolution (9%)
- Good company/do a good job (8%)
- Good value/fair price (7%)
- Good water quality (7%)
- Polite/friendly staff/workmen (4%)
- Efficient (4%)
- Deal with issues (4%)
- Helpful (3%)
- Resolve problems (3%)
- Good billing system (3%)
- Fantastic/brilliant (3%)
- Responsive (3%)

Passives (scores of 7-8) – 126 customers

- No problems (34%)
- Good customer service (8%)
- Poor water quality (8%)
- No supply problems (6%)
- Quick response/resolution (6%)
- Expensive (6%)
- Good water quality (6%)
- Good experience/happy with them (6%)
- Neutral/indifferent (4%)
- Good communication (4%)
- Always room for improvement (3%)
- Been with them for years (3%)
- Nothing to compare against/no choice/had no real dealings with them (30%)

Detractors (scores of 0-6) – 65 customers

- Expensive (25%)
- Neutral/indifferent (20%)
- Poor water quality (12%)
- No problems (8%)
- Inconsistent water supply (6%)
- Improvements needed with billing system (6%)
- Prefer one bill for both services (5%)
- Lots of leaks/not maintaining pipes (3%)
- Poor communication (3%)
- Would look for best price (3%)
- No supply problems (3%)
- Poor experience with them (3%)
- Responsive (3%)
- Nothing to compare against/no choice/had no real dealings with them (28%)



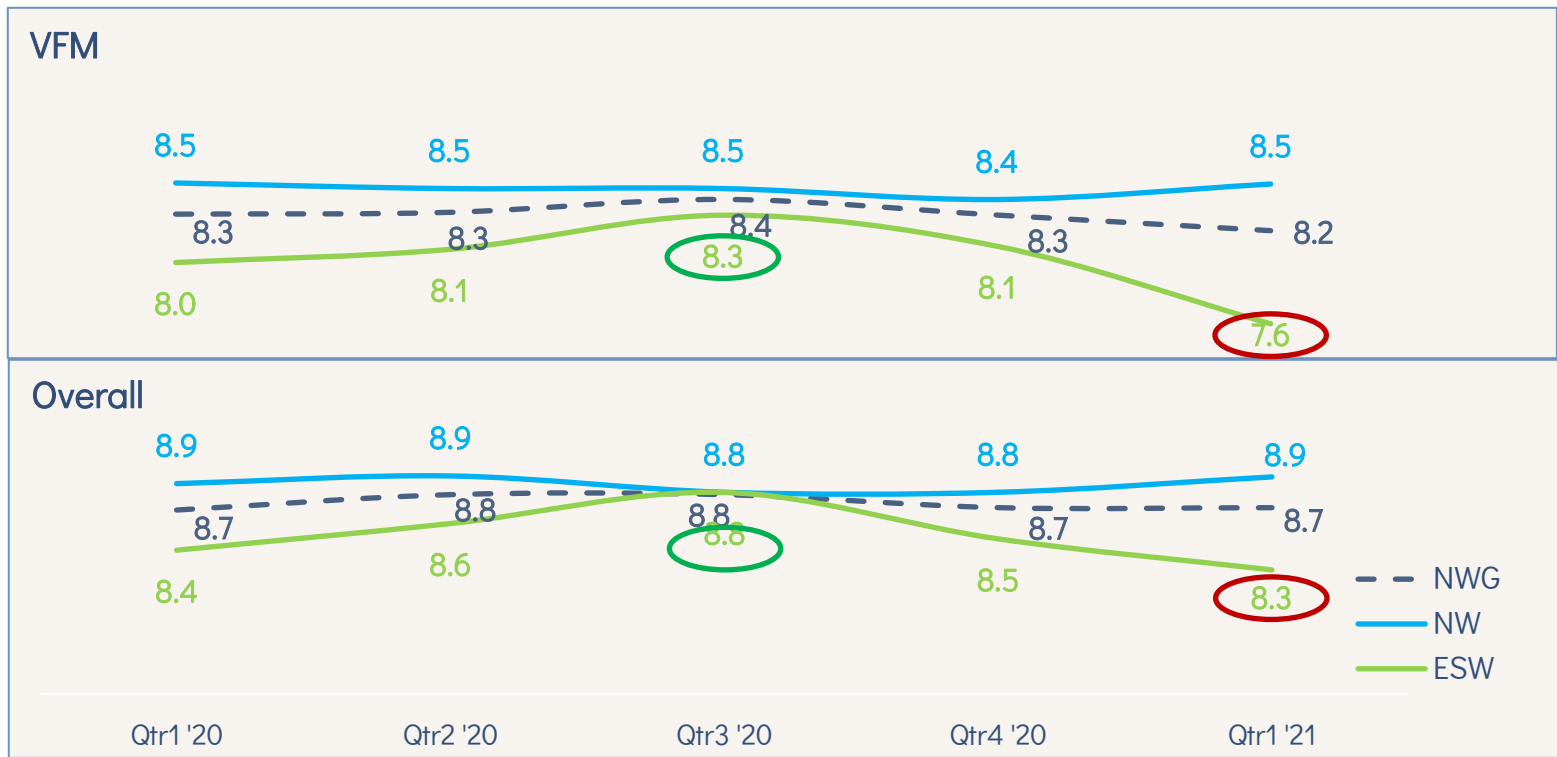
Top improvements to give a higher score

Non-Promoters (scores of 0-8) - 191 customers

- Reduce cost (27%)
- Improve water quality/taste/smell (7%)
- Better ongoing maintenance of sewers/pipes (4%)
- Repair leaks (more quickly) (3%)
- Keep customer informed of progress on issues raised (3%)
- Let customers decide on having a meter (or not) (3%)
- More accurate bills/fewer estimated bills (2%)
- Be easier to contact (2%)
- Be more environmentally aware/friendly (2%)
- Improve water pressure (2%)
- Notify customer of any issues/works (2%)
- Improve customer service (2%)

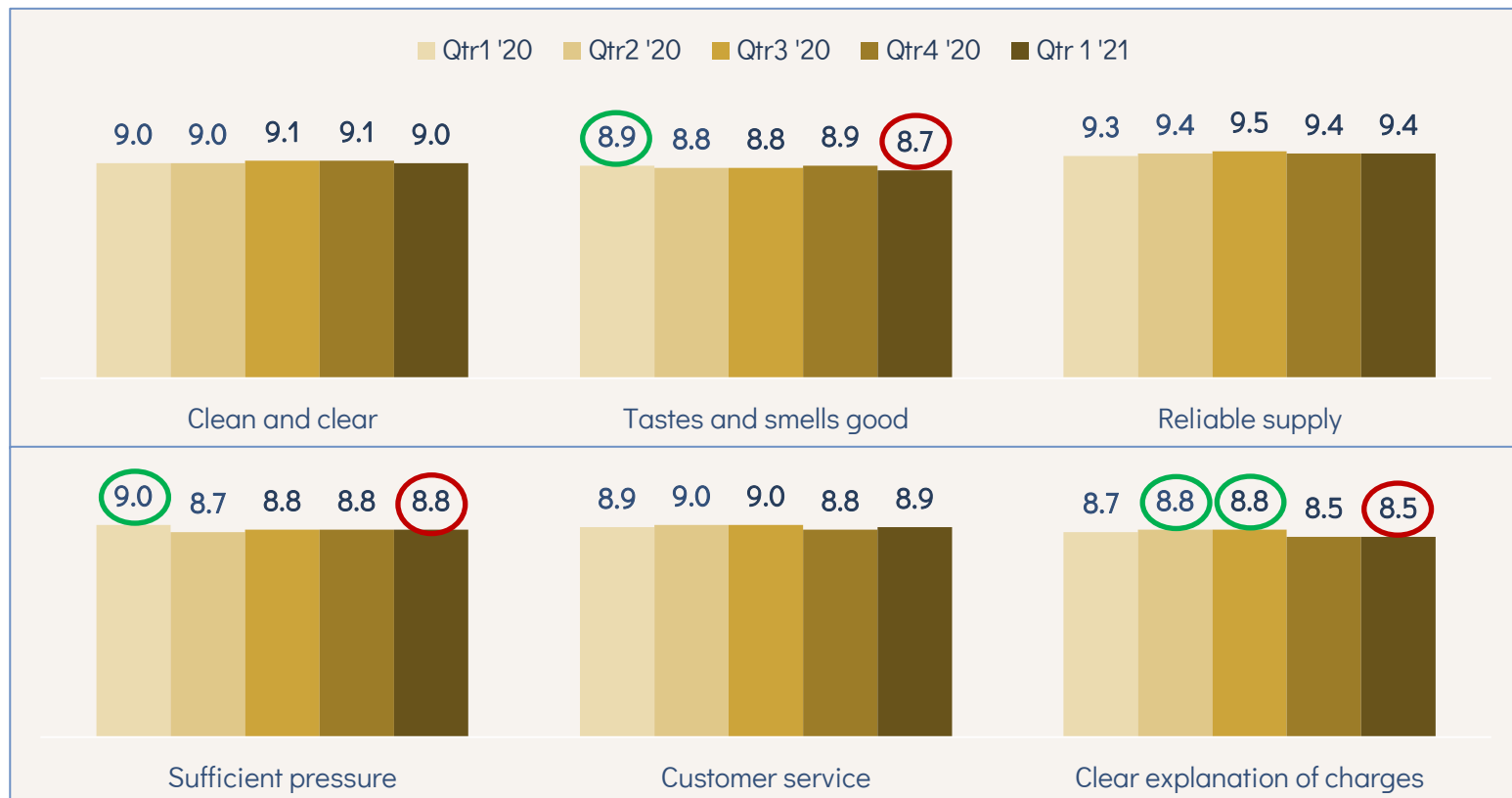


Overall satisfaction and with Value for Money, since this quarter last year





Service satisfaction 1 (NWG)



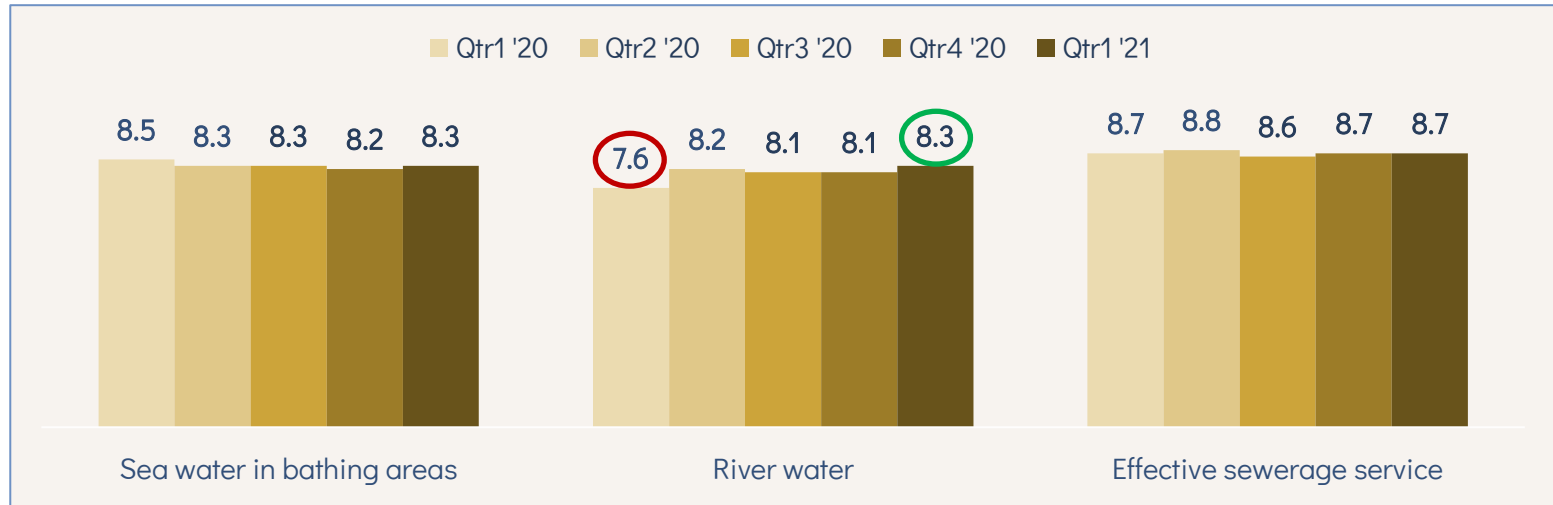
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Service satisfaction 1 (by region)

Clean and clear	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	9.2	9.2	9.1	9.2	9.1
ESW	8.8	8.7	9.2	9.0	8.7
Tastes and smells good	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	9.1	9.0	8.8	9.0	8.8
ESW	8.6	8.5	8.8	8.7	8.6
Reliable supply	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	9.4	9.5	9.5	9.5	9.5
ESW	9.2	9.3	9.5	9.3	9.2
Sufficient pressure	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	9.2	8.9	8.9	9.0	8.9
ESW	8.7	8.5	8.7	8.6	8.5
Customer service	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	9.0	9.1	9.0	8.9	9.1
ESW	8.7	8.8	8.9	8.6	8.4
Clear explanation of charges	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	8.8	8.8	8.8	8.7	8.8
ESW	8.6	8.7	8.7	8.3	8.1



Service satisfaction 2 (NW)





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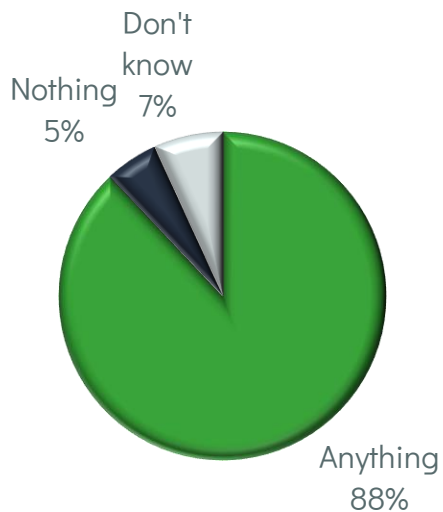
Top improvements required on service issues

Gave any low scores (0-6) - 165 customers

- Improve quality/taste/smell of water (24%)
- Improve water pressure (17%)
- More detail/clarity on charges (12%)
- Better ongoing sewer/pipes maintenance (12%)
- Cleaner rivers (10%)
- Reduce prices (8%)
- Replace old infrastructure/improve capacity (8%)
- More information on their services (4%)
- Cleaner beaches (4%)
- Better communication / more updates (4%)
- Be easier to contact (3%)
- Listen to customers/do as they ask (3%)
- More accurate bills (2%)
- Quicker resolution of problems (2%)
- Improve flood defences (2%)
- Resolve issues (2%)

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What the company does well



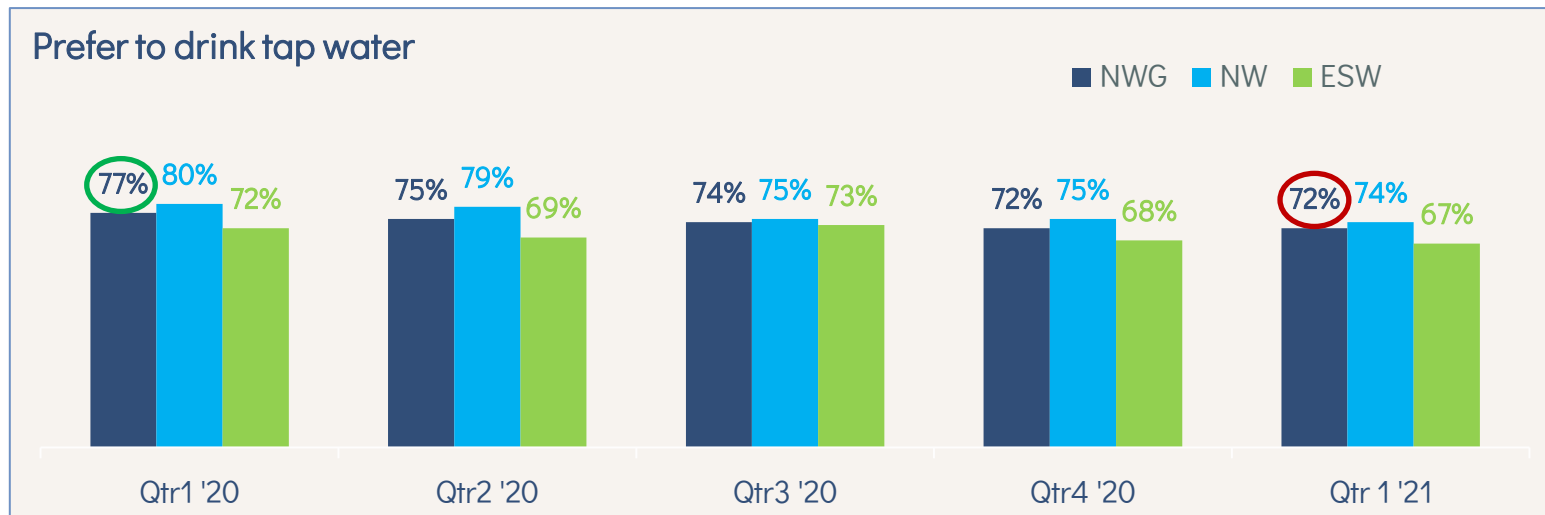
All respondents - 500 customers

- Reliable supply of water (41%)
- Good quality water / tastes/smells good (17%)
- Respond quickly to issues/problems (11%)
- Helpful/friendly/professional call centre staff (8%)
- Never had any problem/never need to contact them (7%)
- Keep customers informed of progress on issues raised (7%)
- Good customer service (7%)
- Good ongoing maintenance of sewers/pipes (5%)
- Repair leaks quickly (5%)
- Notify customers if there are going to be works (4%)
- Good water pressure (3%)
- Timely/accurate bills (3%)
- Helpful/friendly/professional engineers (2%)
- Provide good information on services (2%)



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

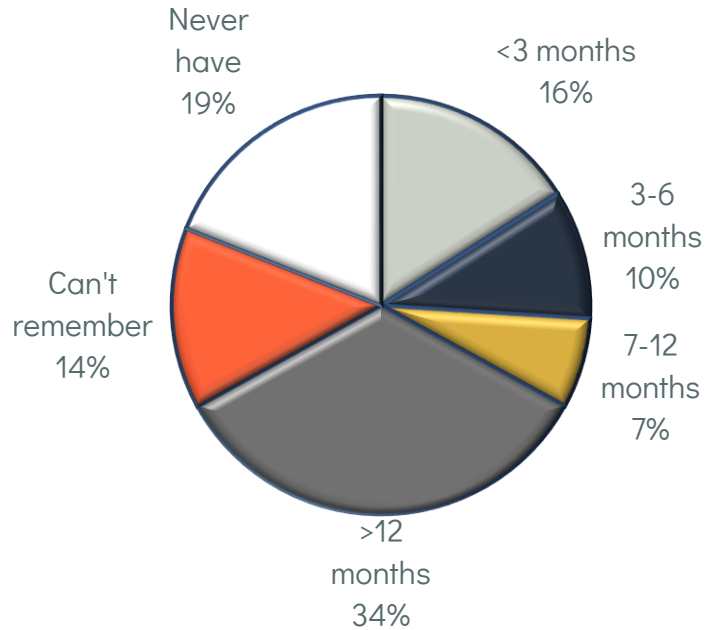
Tap water preference



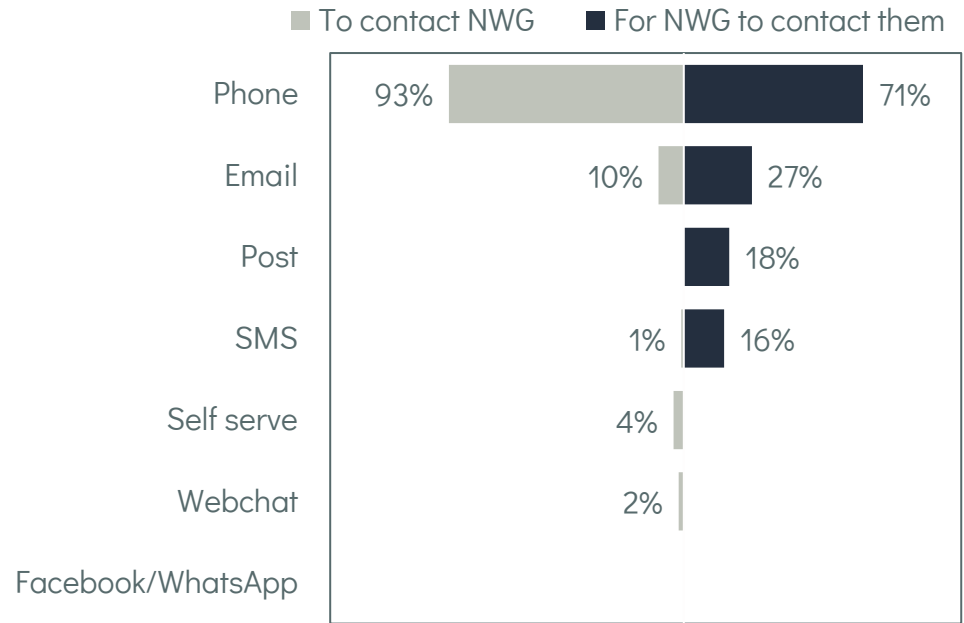


Contact

When last had contact with NWG

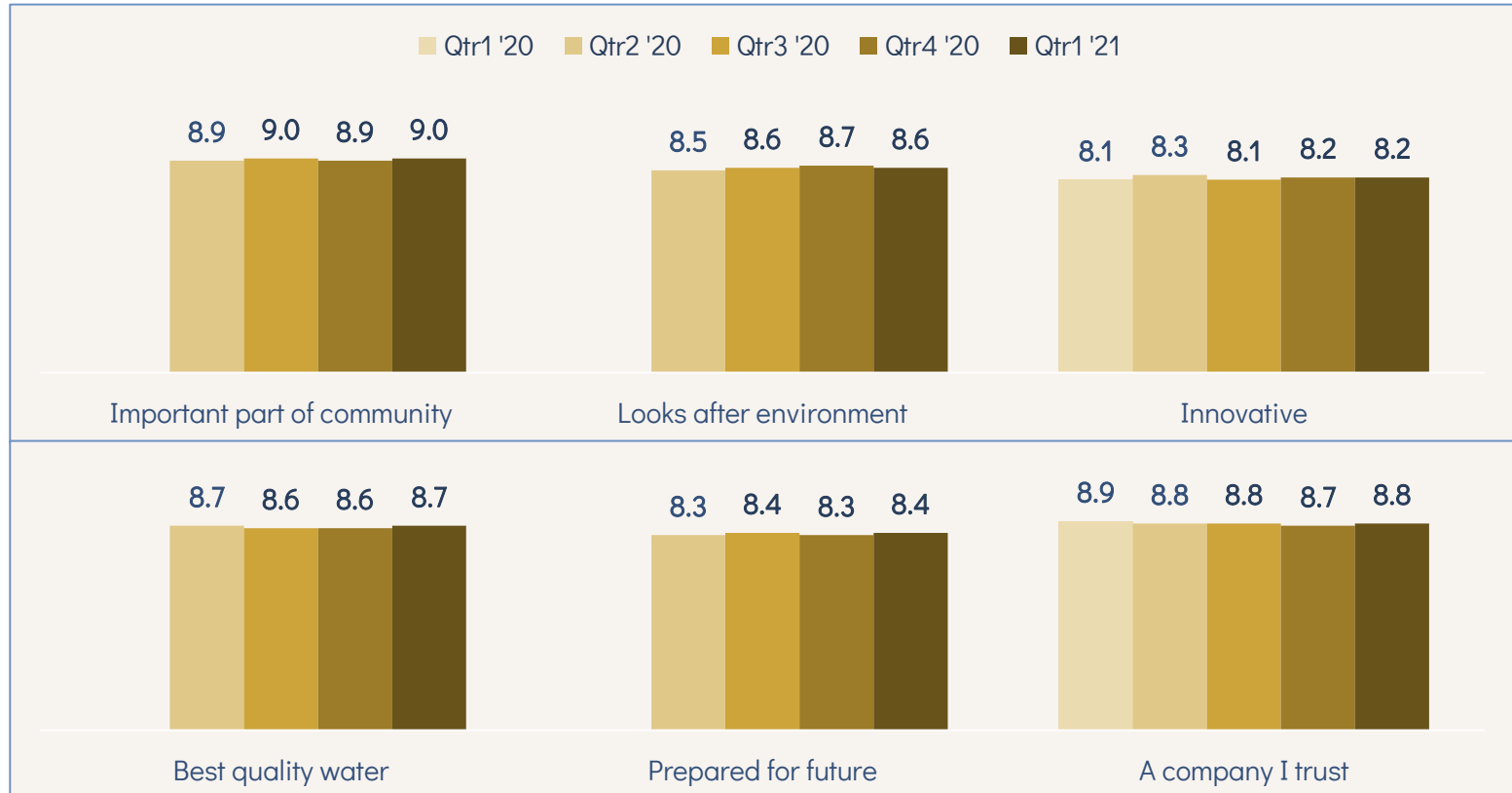


Preferred contact methods



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Brand values (NWG)



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Brand values (by region)

Important part of community	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW		9.1	9.0	9.1	9.1
ESW		8.7	9.0	8.6	8.9
Looks after environment	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW		8.7	8.6	8.8	8.7
ESW		8.3	8.5	8.4	8.4
Innovative	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	8.3	8.5	8.1	8.3	8.5
ESW	7.7	8.0	8.0	8.0	7.6
Best quality water	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW		8.9	8.7	8.9	8.9
ESW		8.4	8.5	8.2	8.2
Prepared for future	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW		8.4	8.4	8.5	8.6
ESW		8.1	8.3	8.1	8.1
A company I trust	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
NW	9.0	9.0	8.8	8.9	9.0
ESW	8.6	8.6	8.9	8.5	8.3

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Comments relating to trust score

All respondents - 500 customers

- Never had any problems – 27%
- No reason not to trust them – 18%
- Reliable water supply – 17%
- Good quality water – 10%
- Good customer service – 10%
- Quick response/resolution to issues – 10%
- Good reputation/don't hear anything bad – 8%
- No real dealings/no reason – 8%
- Reliable – 7%
- Happy with them – 7%
- Deal with issues/problems – 6%
- Been with them a long time - 6%
- No other option/monopoly – 6%
- Notify customers of any works/issues - 6%
- Good communication - 4%
- Good (previous) experience – 4%

I can trust them to provide the service I need with regards to the water. Overall pricing is fair. Their environmental credentials, a reliable supply and they keep customers informed.

The supply of water is always clean, clear, fresh. I've never had any problems with water pressure, or any problems with any of my water or sewerage.

Never had any reason not to, I contacted them just once with regards to the stopcock and they were very polite and helpful.

In the simple thing as the drop in pressure they were very swift, I didn't have to call them, they texted me. It shows they are customer responsive and you can only warm up to them and trust them.

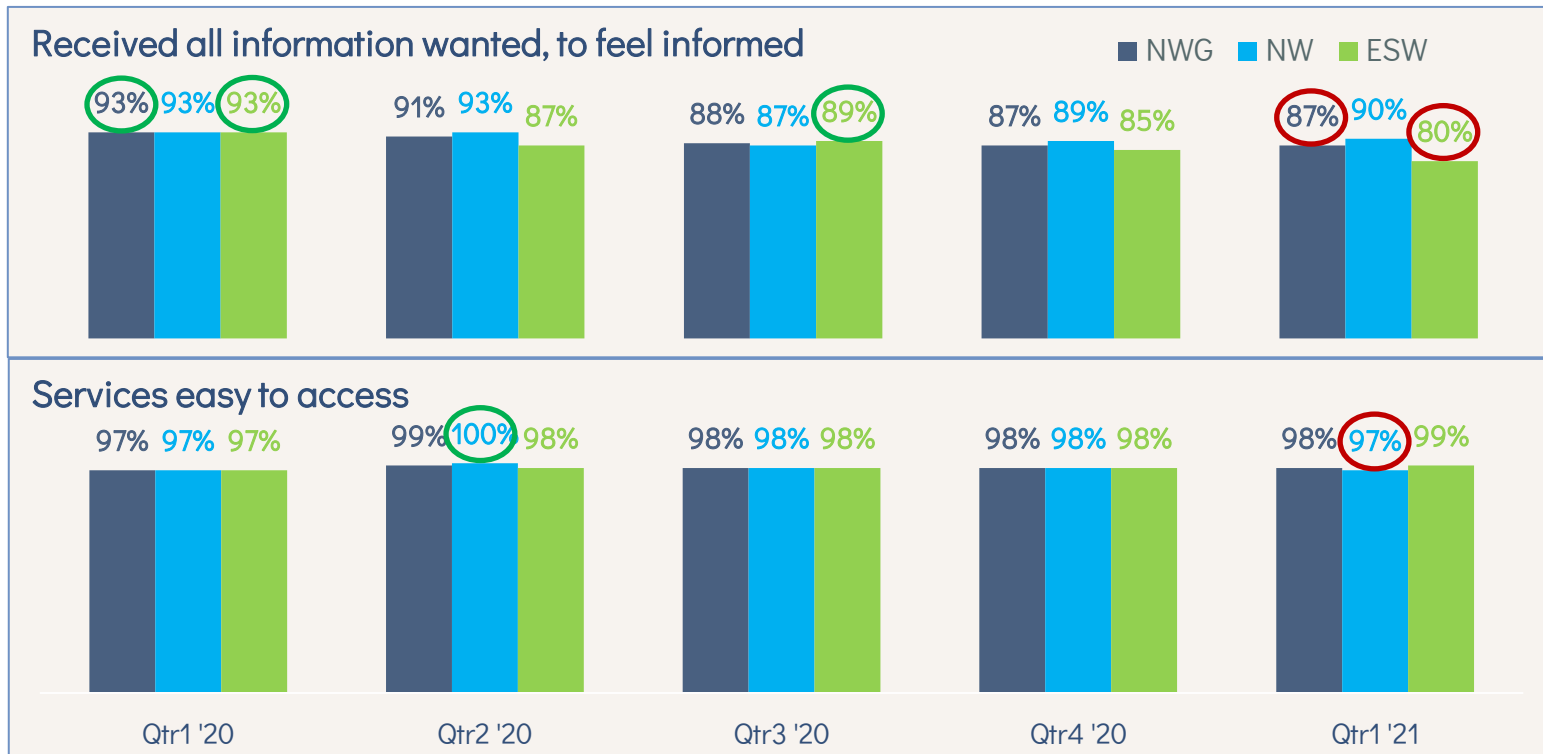
I trust because when you call they listen to you, if you have difficulty paying they understand. You listen to them, they listen to you. If I call them they contact me back.

How can I trust them when it took them one full year to give me a confirmation that I'm not owing them anything?



Note: results are re-based to exclude any respondents who do not have an opinion

Information and service access



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11 customers think that services are not easy to access. They explain:

It takes so long to get through. When you do get through you get passed to others and in my experience I've not got any closure.

During Covid-19 it was about 20-30 minutes hold time then I put the phone down.

I've tried online and by telephone and it's been terrible to get through to them.

It takes forever to get through to them, when I did have a problem I couldn't speak to a senior advisor at all, I couldn't get any sense out of them.

When I phoned them it was telling me to go onto the internet to keep reporting it. I do not use computers.

I haven't access to the internet at home. I usually use the library but it's closed and due to Covid at the moment I find it difficult to get in contact with anybody through the internet.

I haven't had much communication with them so I'd have to Google their phone number.

Our water meters are not accessible, they are buried under a bush. If they made them more accessible it could make a difference on people's opinions to their service.

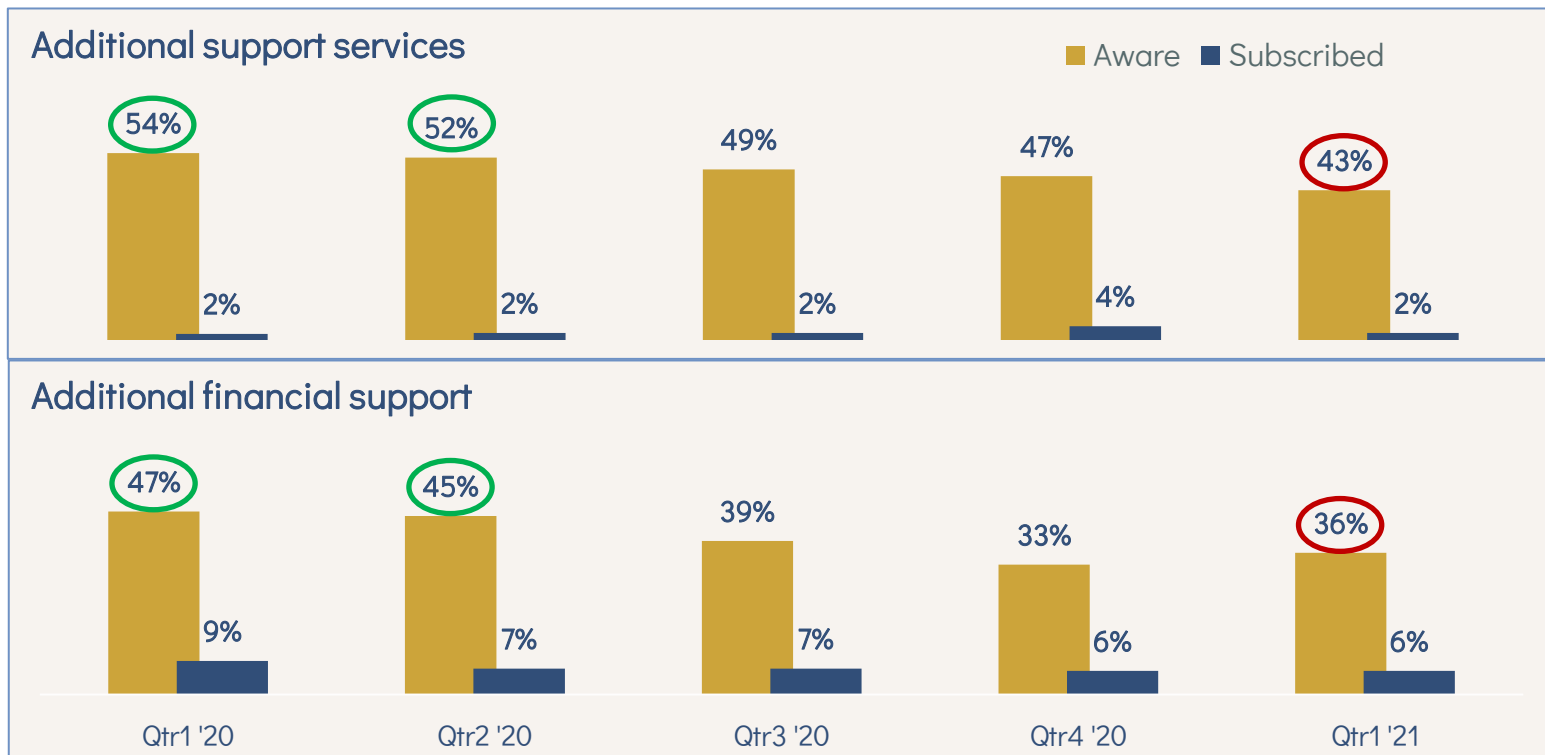
I'm not aware of the other services.

I don't know anything about the company.

When I ring them they say we are short staffed, but they shouldn't take an hour to get through to somebody on the phones. If I've got to pay this monthly bill I don't know if I'm coming or going.

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Priority services (NWG)



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Priority services (by region)

NW	Additional support services	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
	Aware	56%	53%	47%	50%	45%
	Subscribed	1%	2%	1%	3%	3%
	Additional financial support	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
	Aware	51%	45%	38%	32%	35%
	Subscribed	10%	6%	8%	4%	5%

ESW	Additional support services	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
	Aware	51%	52%	52%	43%	40%
	Subscribed	3%	2%	3%	4%	2%
	Additional financial support	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
	Aware	39%	47%	40%	36%	39%
	Subscribed	7%	8%	6%	10%	9%

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HEADLINES

NPS this quarter – 46.8

Overall satisfaction 8.7
and satisfaction with
value for money 8.2

Trust this quarter – 8.8

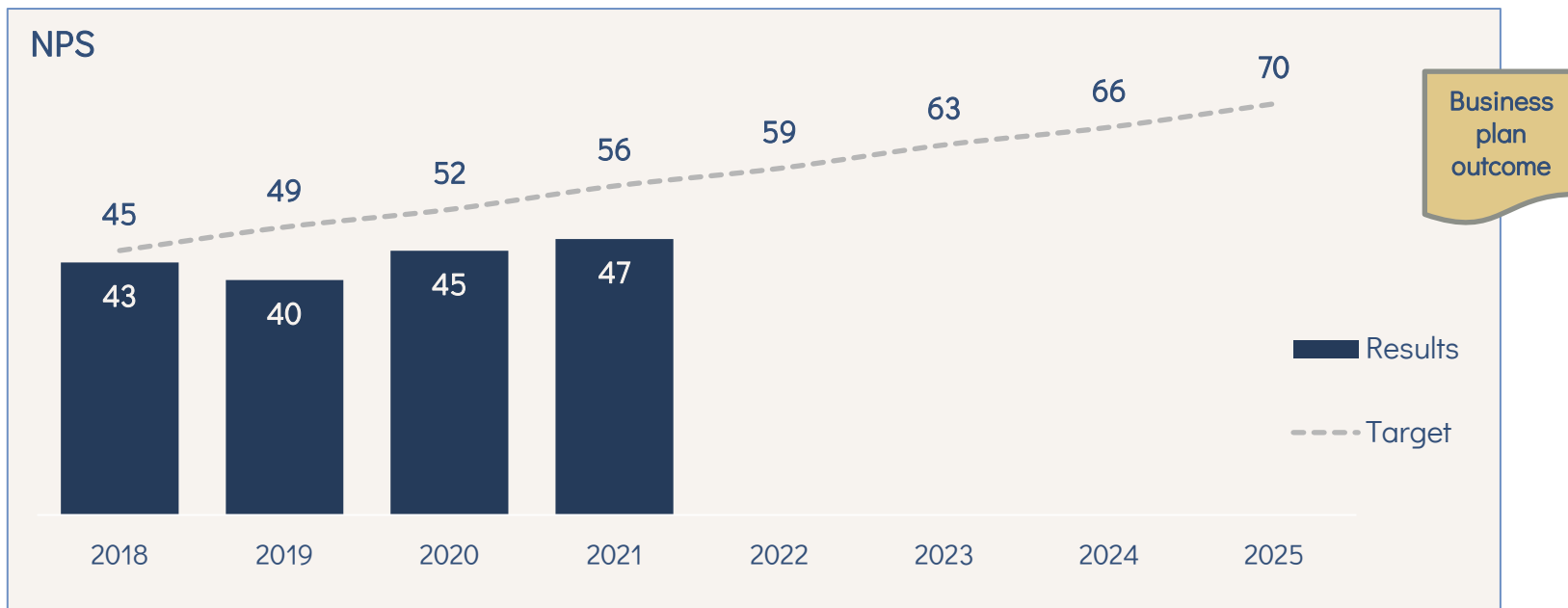
Overall, awareness of additional financial and non-financial support, having received all information wanted and preference for tap water are significantly down from the same period last year, the latter two measures driven by ESW

Water that tastes and smells good and sufficient pressure scores have both decreased significantly from the same period last year, driven by NW, whilst the river water score has improved

Whilst there have been no significant changes since last quarter on any of the measures, individual comments made by those saying that services are not easy to access point to long wait times on phone lines

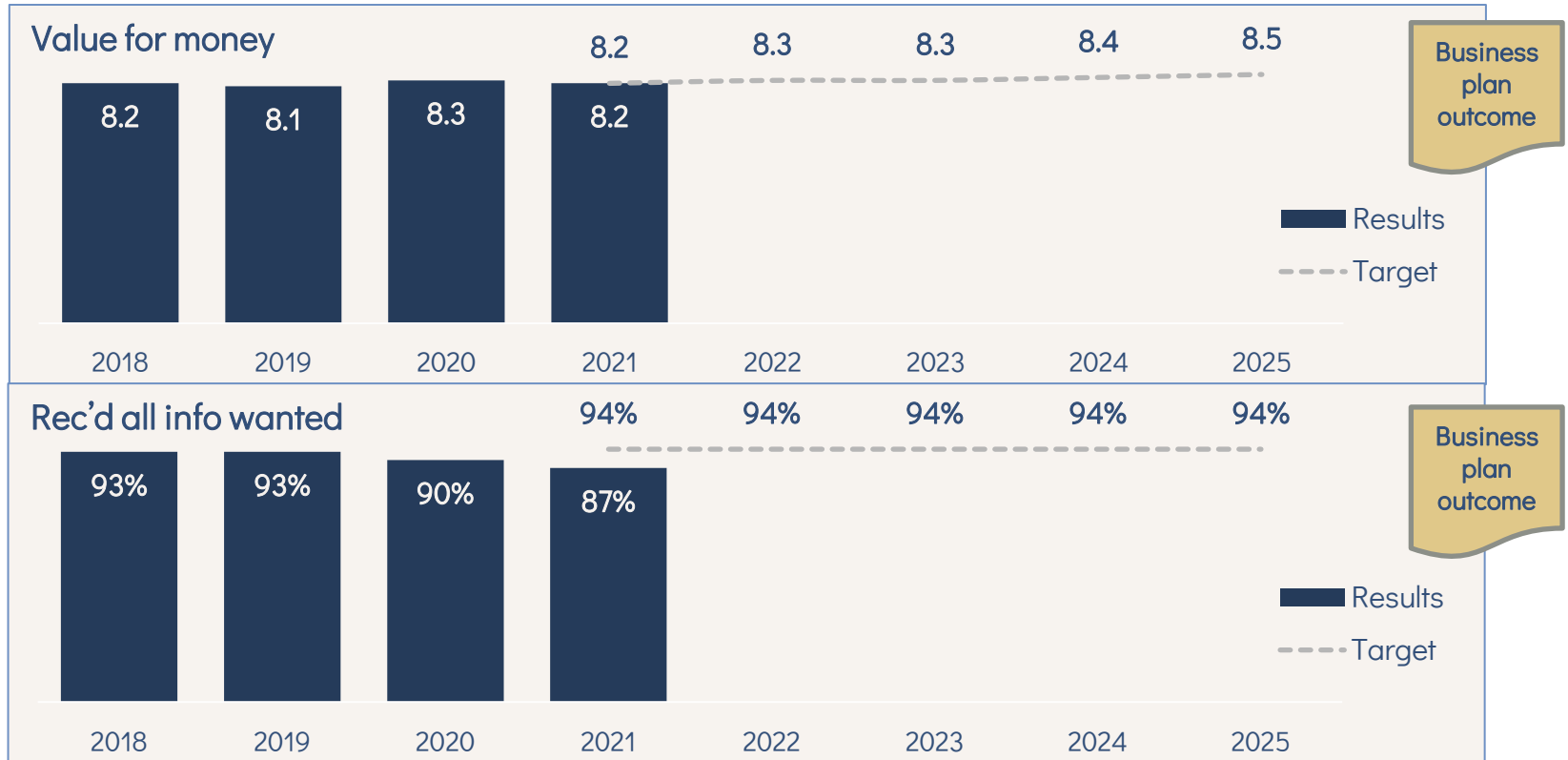
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Progress towards targets, 1



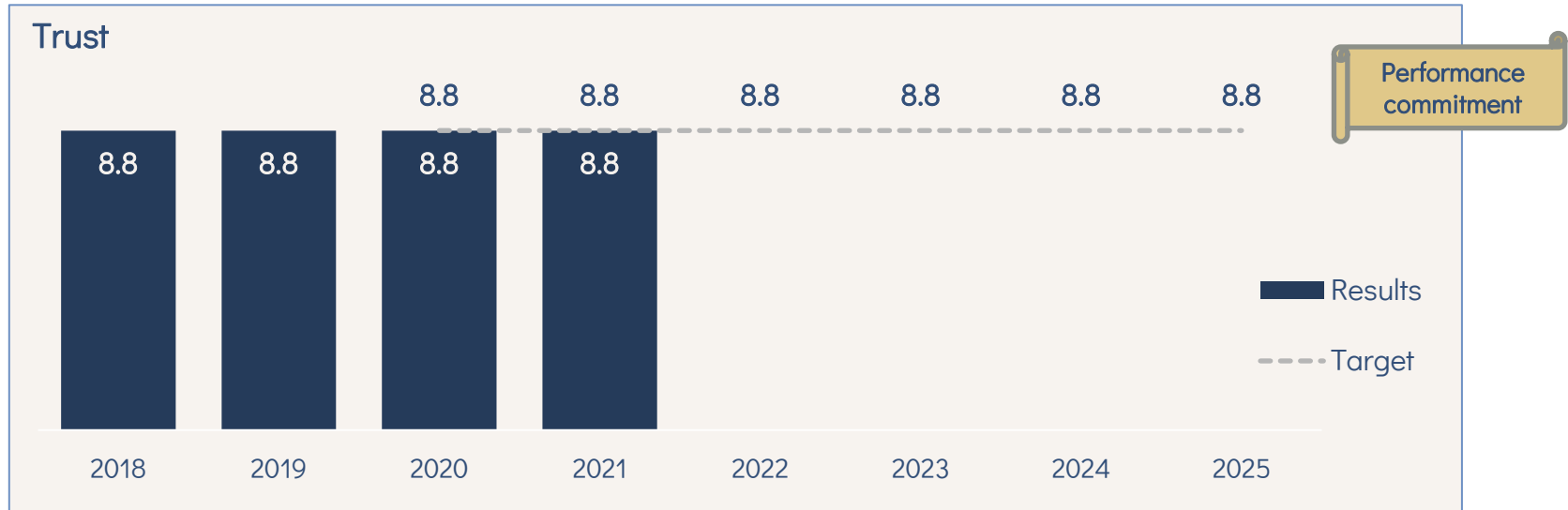
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Progress towards targets, 2



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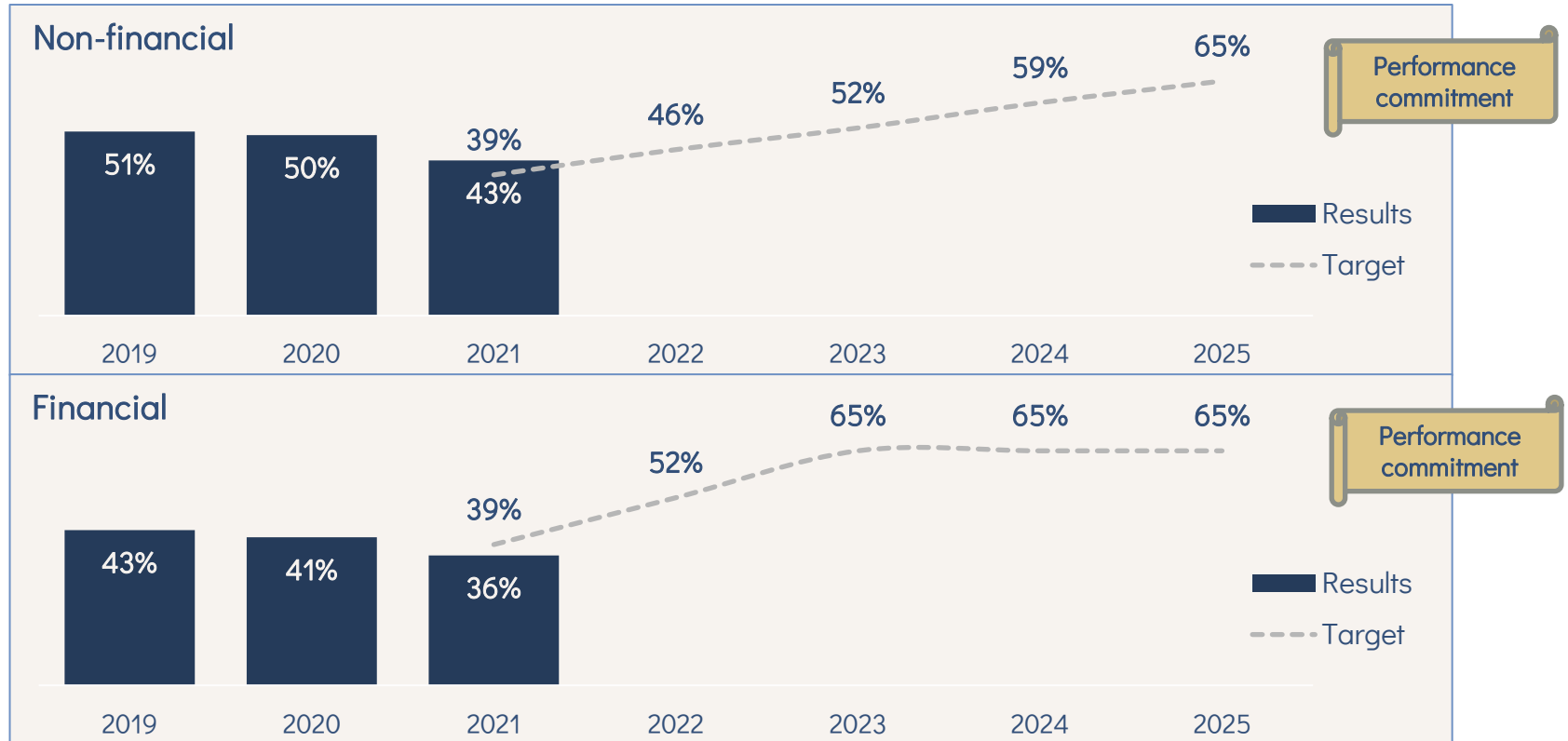
Progress towards targets, 3



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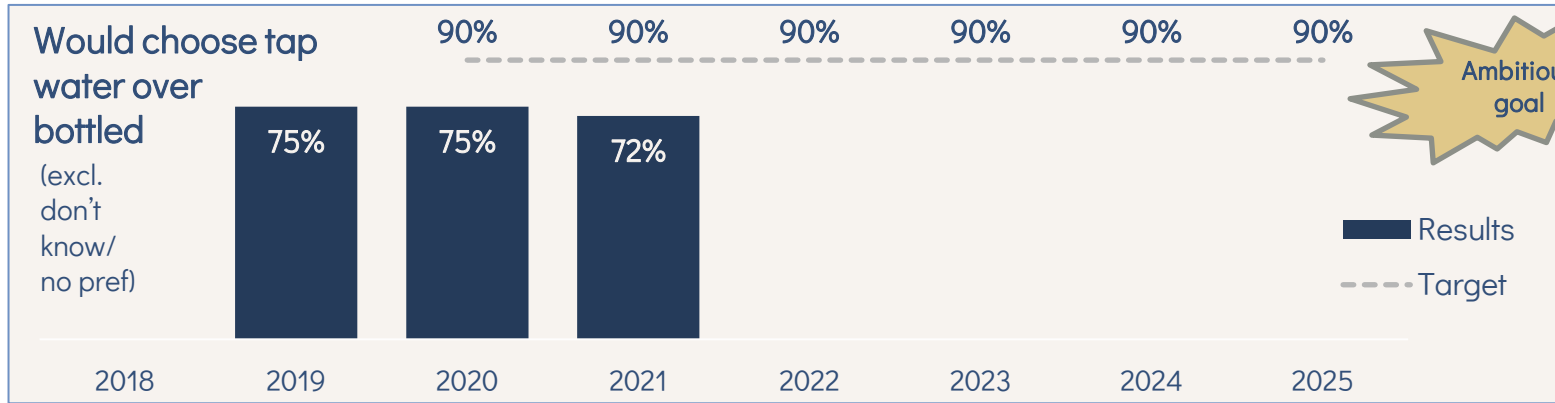
Progress towards targets, 4

Awareness of additional support





Progress towards targets, 5





DEFINING THE **CLEAREST** DIRECTION

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THANK YOU



All of our work is carried out in accordance with the requirements of the international quality standard specific to the market research industry, ISO 20252

