

Q1'23 Domestic Tracker

NWG

21/04/23

TRINITY
M & QUEEN

NWG
living water

Contents

What covered in
this report

3	Introduction	20	Brand values
4	NPS	22	Information & services
8	Overall satisfaction & areas of priority	24	Priority services
17	Company suggestions & preferences	27	Waterside parks
		30	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: 6th March – 31st March 2023

Average interview length: 12 min

Quota	Target	Achieved
North	316	316
Essex	184	184
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
- Satisfaction with specific aspects of the service, what the company does well and suggestions for improvement
- Brand values measures
- Awareness of support services
- Visits to Waterside parks and the influence it has on overall score

NPS



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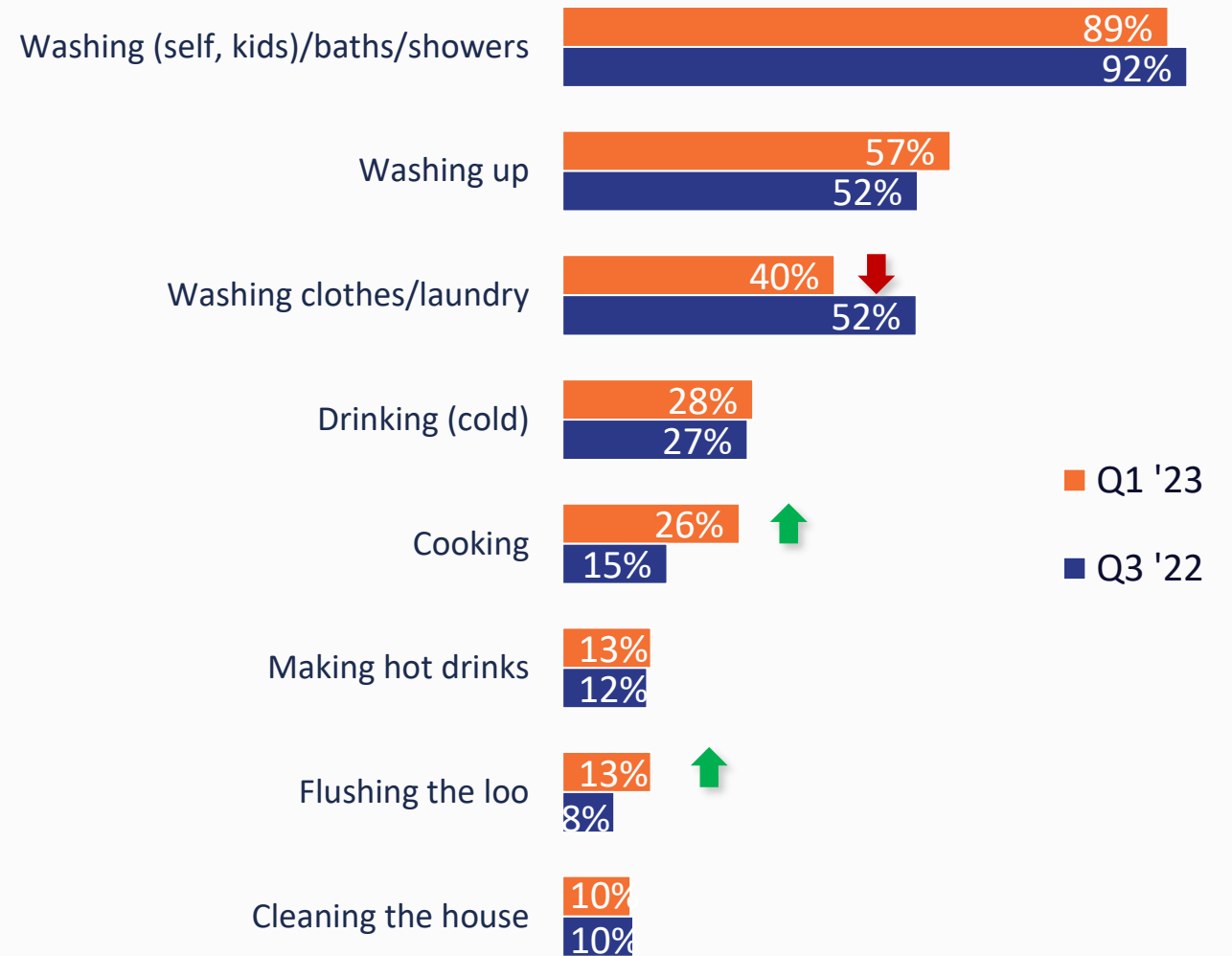
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Water uses at home

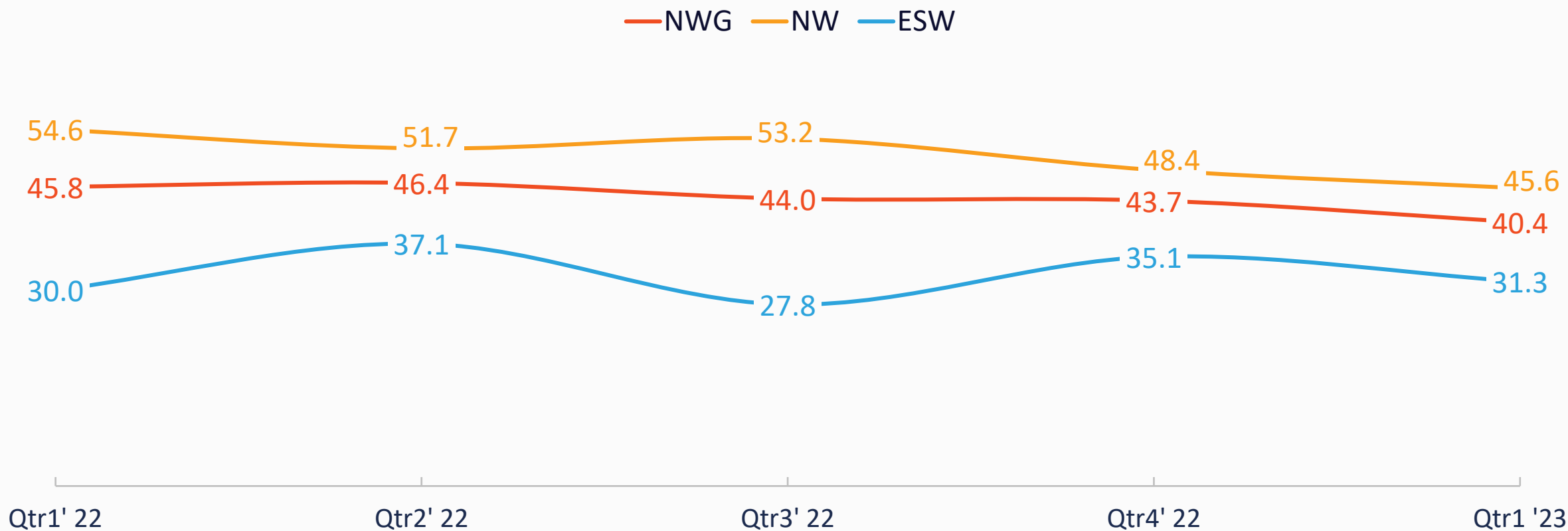
Water uses at home – top 8 %

↑ Significantly higher/Lower than previous Qtr
↓



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 (316), ESW (184)

Reason for NPS score

Promoters (scores of 9-10) - 251 customers

No problems	64%
No supply problems	9%
Good service/customer service	9%
Good experience/happy with them	9%
Ok/fine/satisfied	7%
Good water quality	6%
Good communication/updates/follow-ups/return calls etc	6%
Responsive to issues/good response	6%
Good/fair price/good value	5%
Been with them for years	4%
Handled well/always deal with issues	4%
Reliable/trustworthy	3%
Fantastic/brilliant etc	2%
Helpful	2%
Nothing to compare against/no choice/no real dealings	11%

Passives (scores of 7-8) – 130 customers

No problems	43%
Ok/fine/satisfied	8%
Expensive	8%
Good water quality	8%
No supply problems	7%
Never give a 10/always room for improvement	6%
Improvements needed to billing system - clearer/accurate-read meters/timely etc	5%
Responsive to issues/good response	5%
Poor water quality	4%
Handled well/always deal with issues	4%
Good experience/happy with them	3%
Good communication/updates/follow-ups/return calls etc	3%
Neutral/indifferent	3%
Helpful	2%
Nothing to compare against/no choice/no real dealings	19%

Detractors (scores of 0-6) – 69 customers

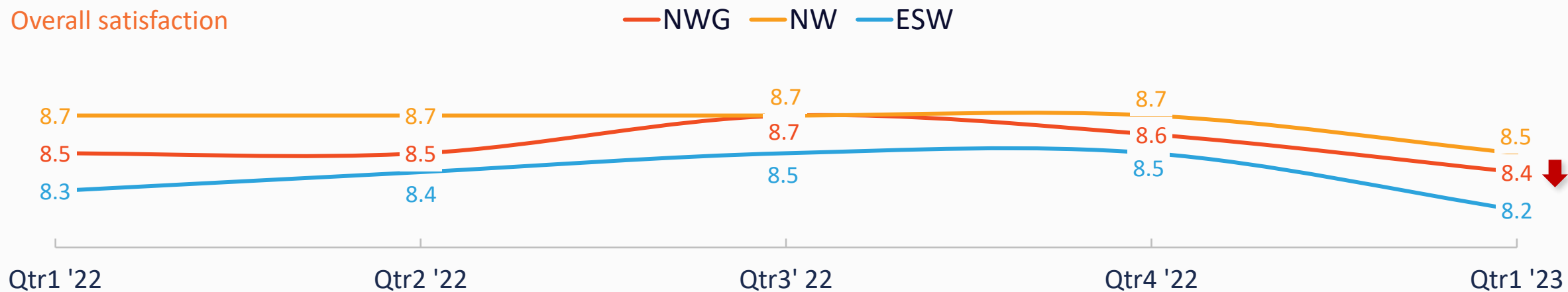
Expensive	23%
No problems	12%
Neutral/indifferent	9%
Improvements needed to billing system - clearer/accurate-read meters/timely etc	9%
Other	9%
Don't recommend anything to anyone/no one to recommend to	6%
Don't know	6%
Lots of leaks/not maintaining pipes/sewers etc	4%
Don't/won't take responsibility/refused to do anything	4%
Poor water quality	3%
Poor experience with them	1%
No supply problems	1%
Ok/fine/satisfied	1%
Would look for best price	1%
Nothing to compare against/no choice/no real dealings	39%

Overall Satisfaction

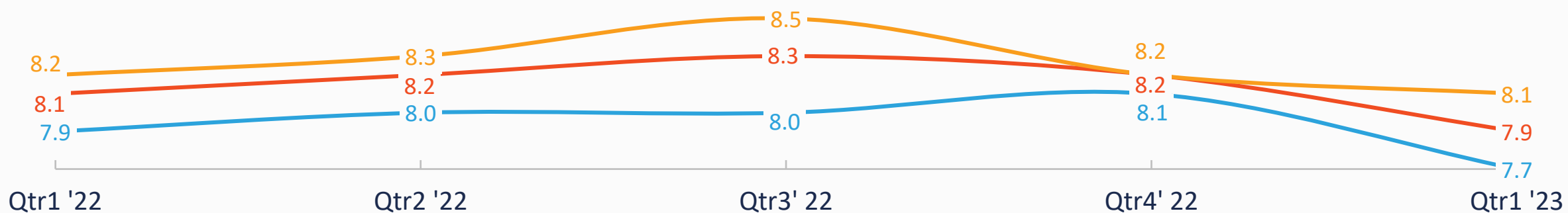


Satisfaction – overall & value for money

Overall satisfaction



Value for money satisfaction

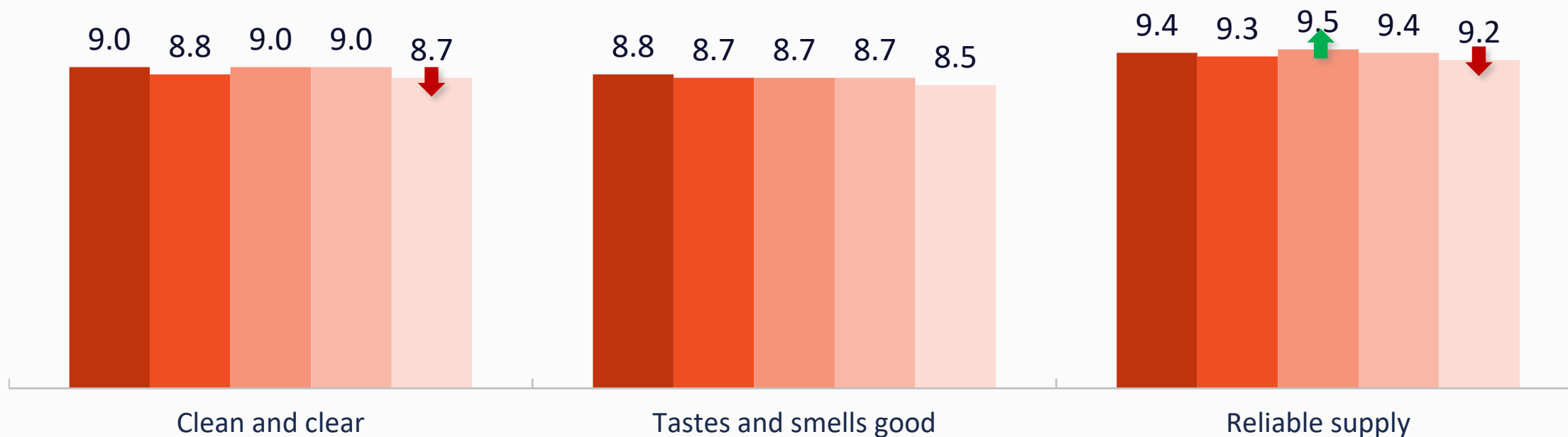


Q2 How satisfied would you say you are with [Northumbrian Water/Essex & Suffolk Water], in terms of value for money for the service they provide? Please give me a score from 0-10, this time where 0 means very dissatisfied and 10 means very satisfied. Q3 And on the same scale, how satisfied are you overall with [Northumbrian Water/Essex & Suffolk Water]? Base NWG (500), NW (316), ESW (184)

Service satisfaction (1)

NWG

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



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

Service satisfaction (2)

NWG

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



NW 8.8 8.9 9.0 8.8 8.7

8.8 8.8 9.0 8.9 8.7

8.5 8.5 8.6 8.7 8.5

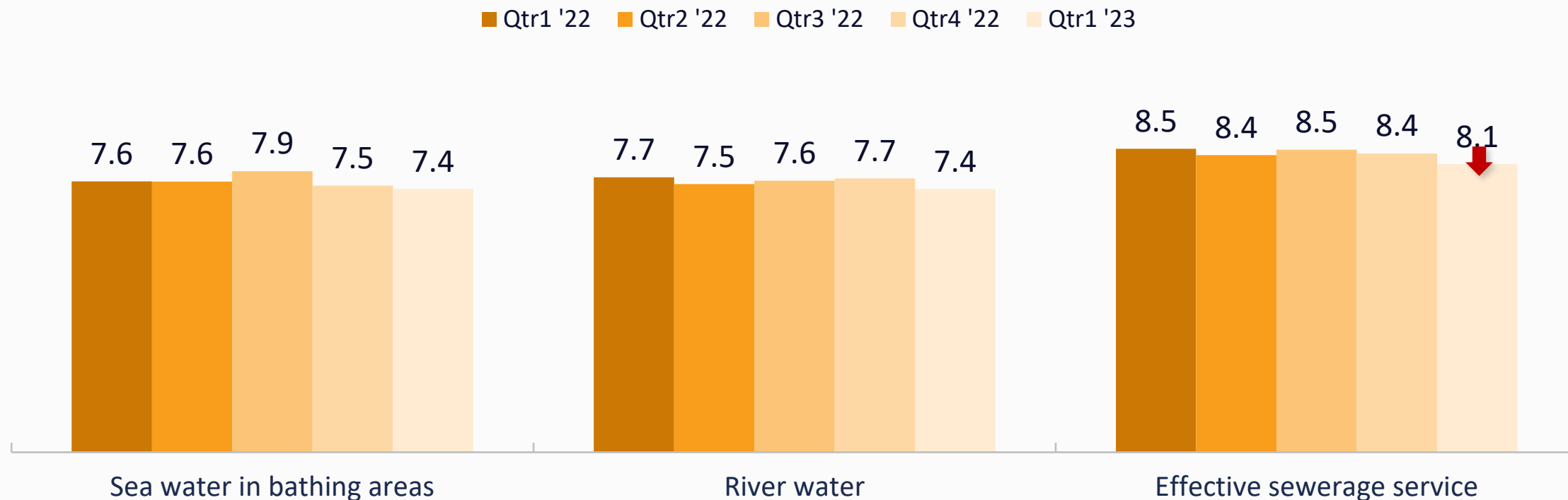
ESW 8.4 8.6 8.5 8.7 8.6

8.2 8.4 8.7 8.6 8.5

8.2 8.2 8.4 8.5 8.2

Service satisfaction (NW only)

NW region only



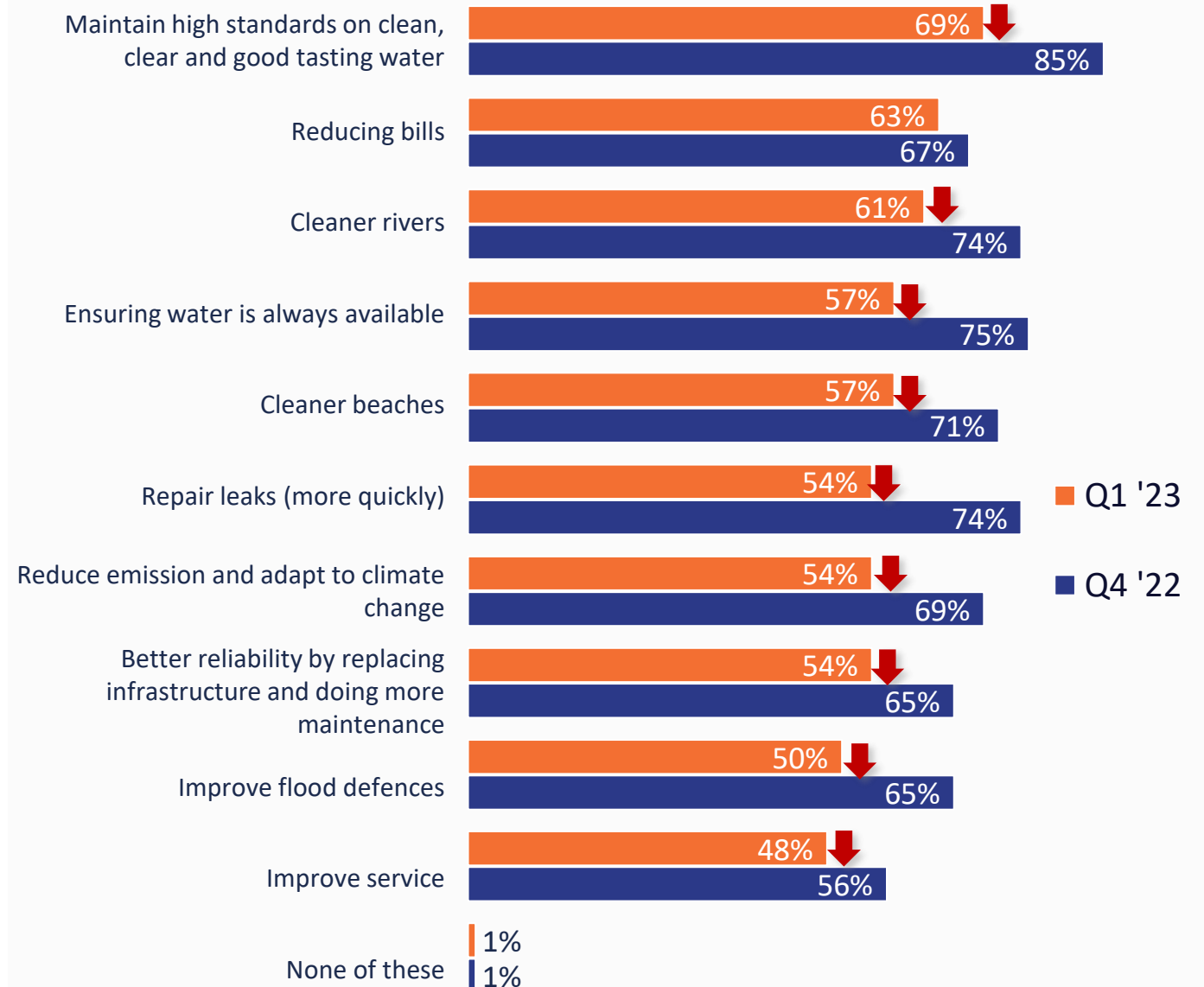


Areas of the business plan that respondents think should be a priority

(NWG)

NWG Total

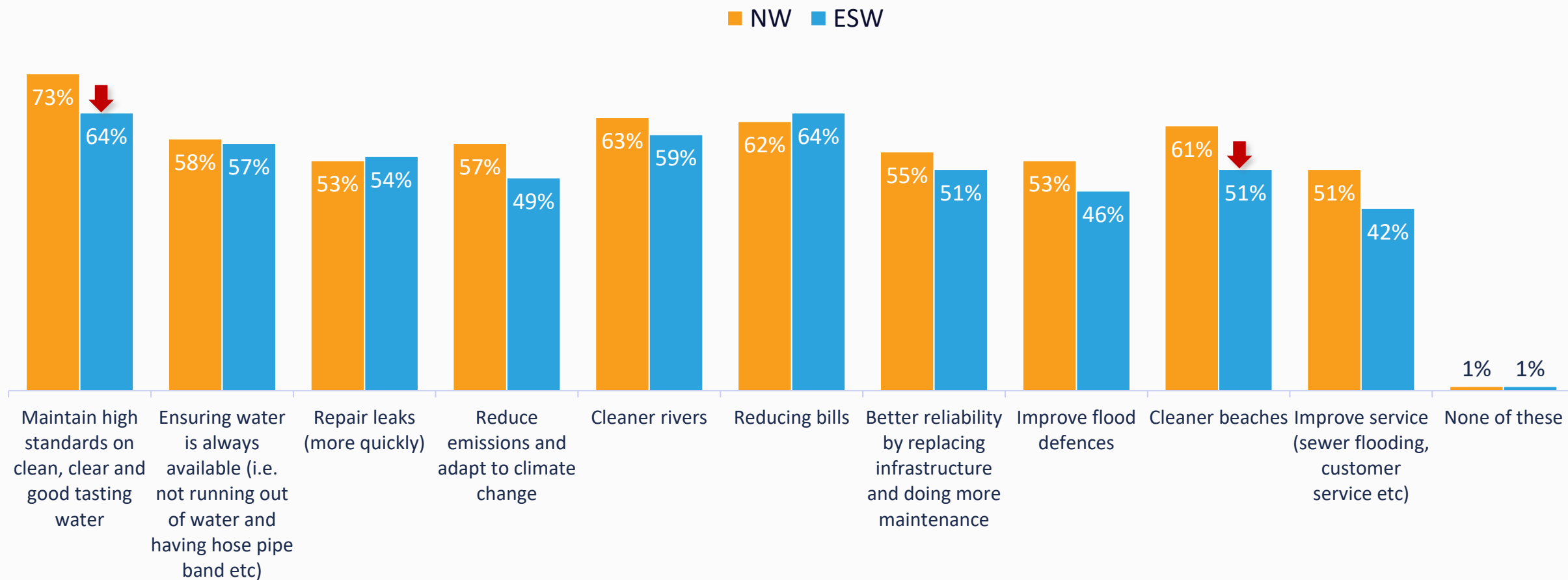
↑ ↓ Significantly higher/Lower than previous Qtr



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 (316), ESW (184)

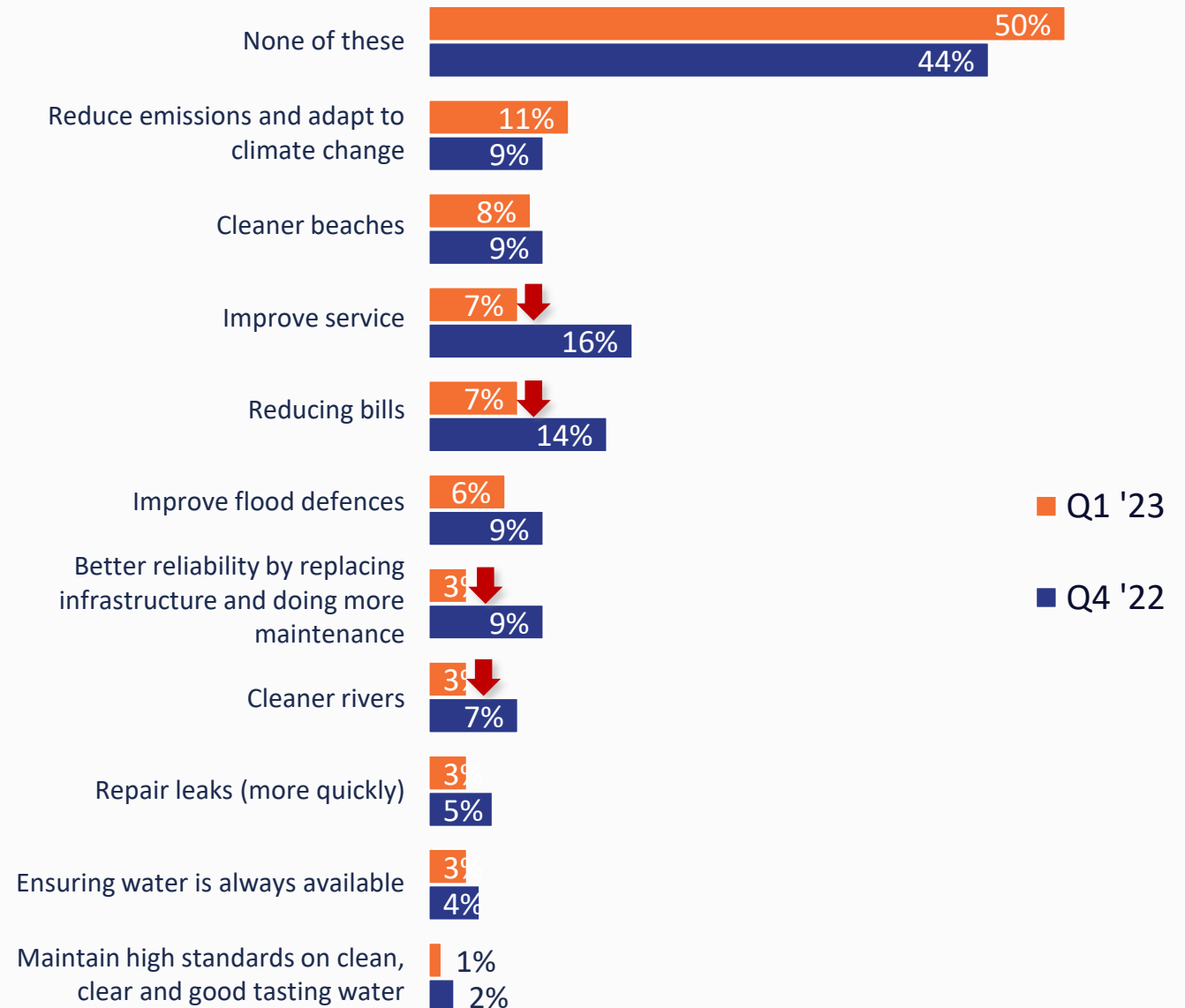


Areas of the business plan that respondents think are less important

(NWG)

NWG Total

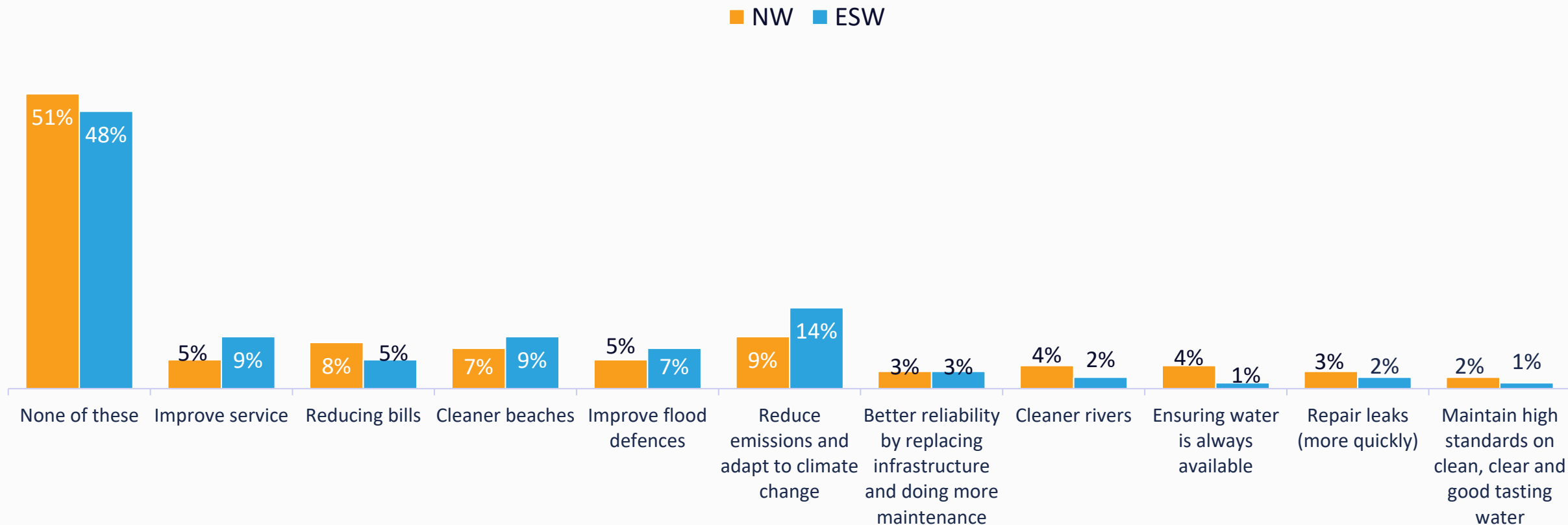
↑ ↓ Significantly higher/Lower than previous Qtr



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)



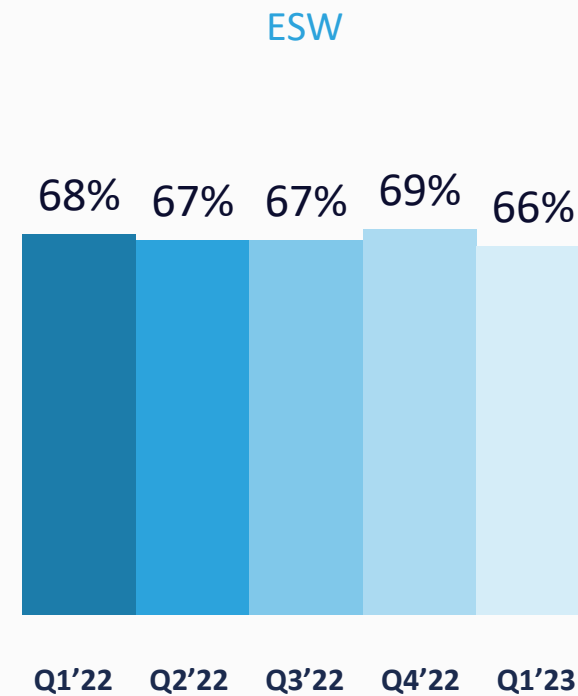
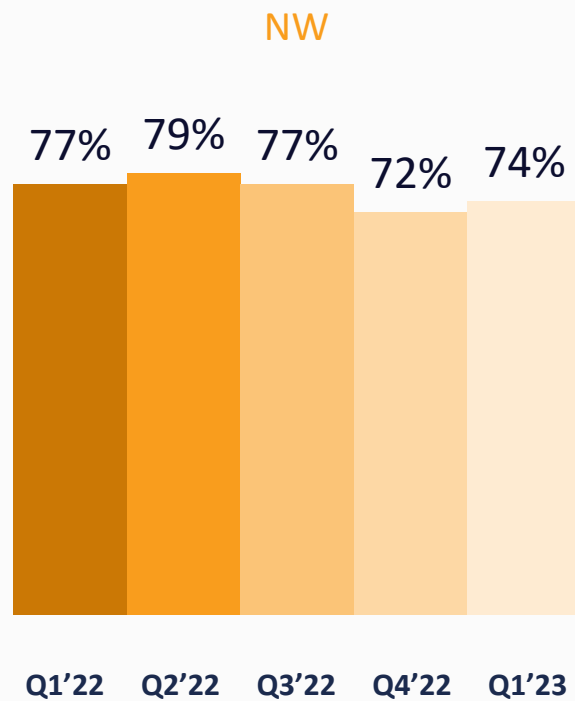
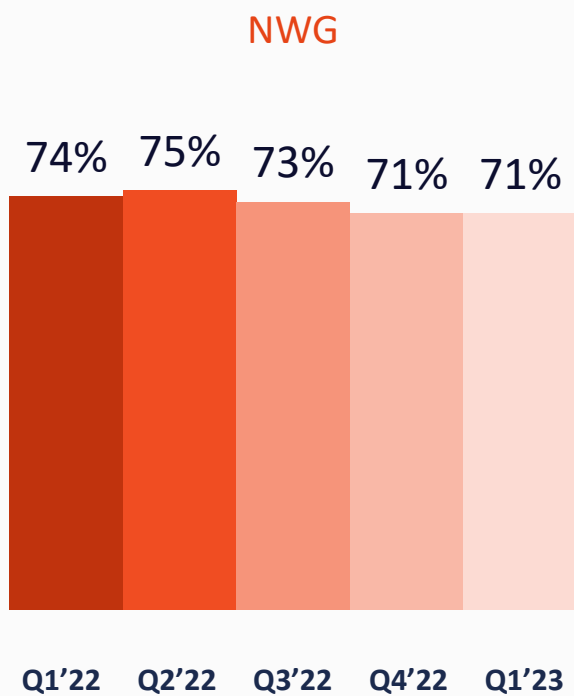
Q5d. And which of these, if any, do you think is less important for them to focus on? Base: NW (316), ESW (184)

Company suggestions and preferences



Tap water preference

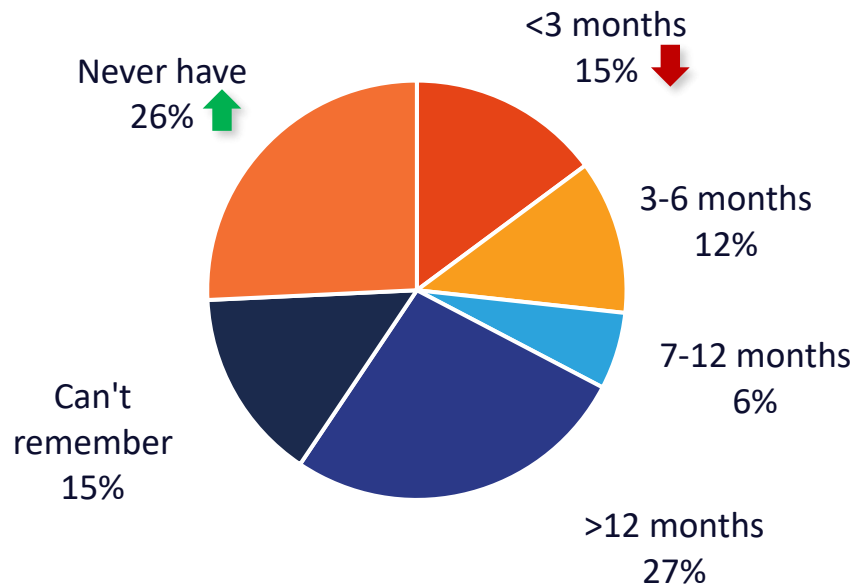
% who prefer tap water over bottled water



Q7 If you had to choose, would you drink tap water or bottled water? Base All those who expressed a preference NWG (488), NW (310), ESW (178)

Contact with NWG

When last had contact with NWG?

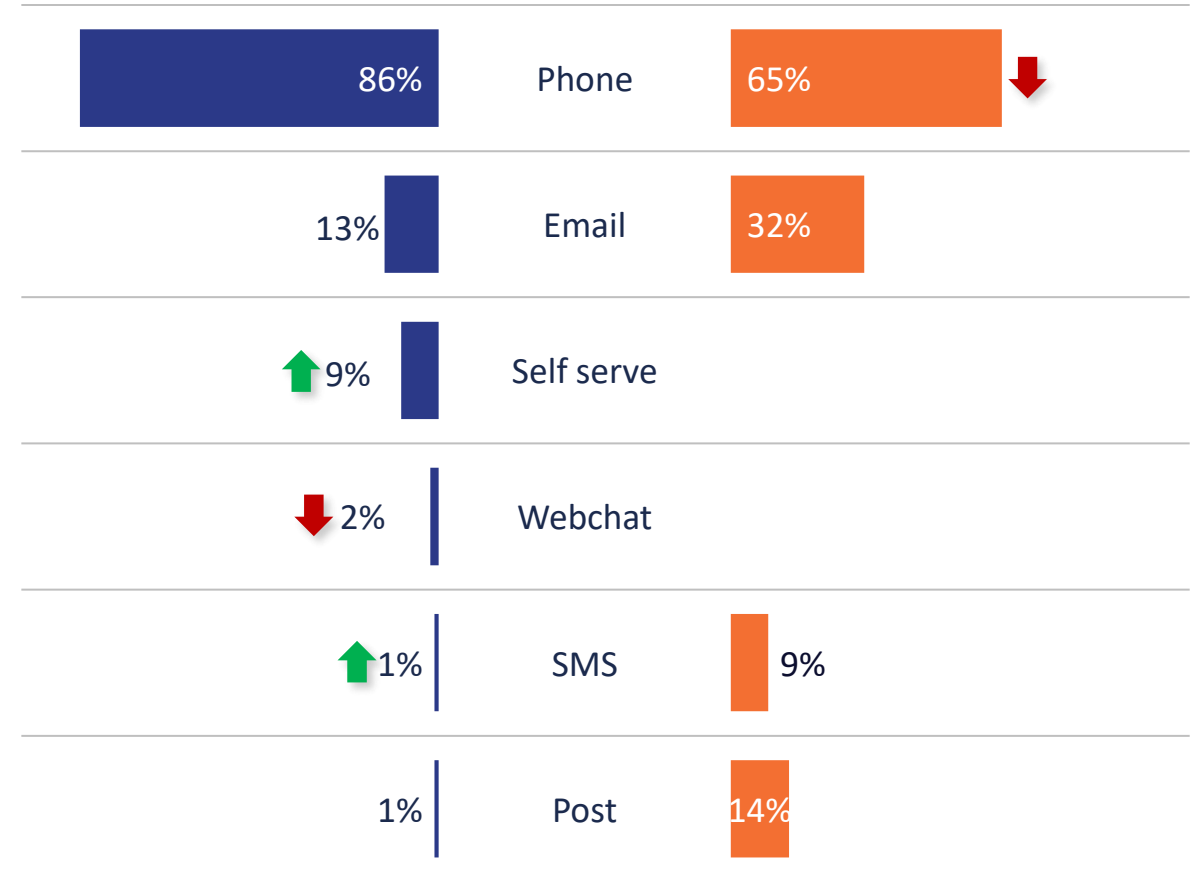


Preferred contact methods

↑ ↓ Significantly higher/Lower than previous Qtr

Preferred method to contact NWG

Preferred method to be contacted by NWG



Brand values



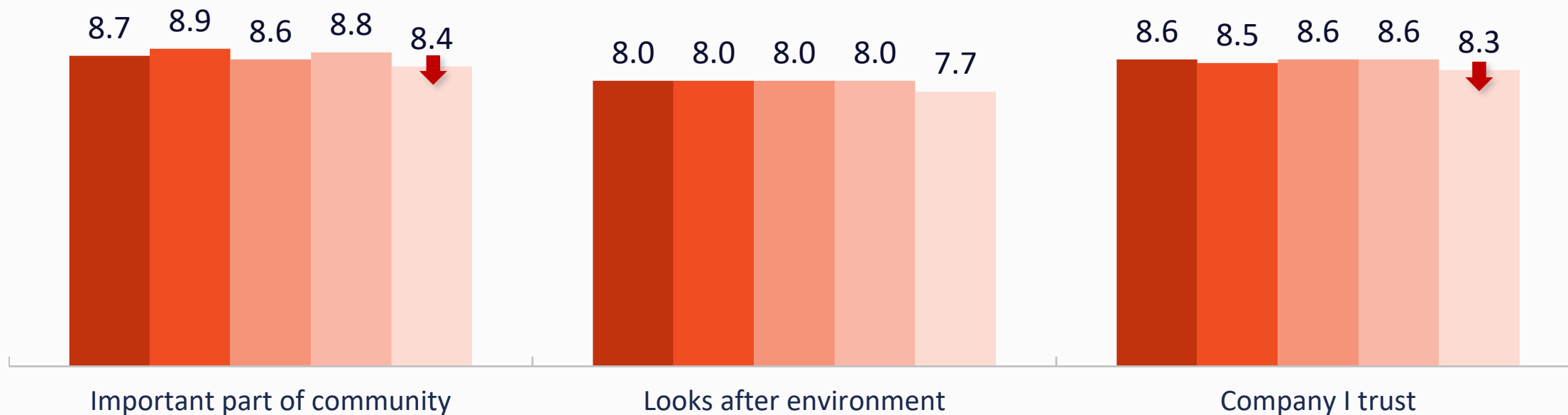
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Brand values

Overall service satisfaction

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



NW	8.8	8.8	8.7	9.0	8.5	8.2	8.0	8.2	8.1	7.9	8.8	8.6	8.7	8.7	8.4
ESW	8.5	8.5	8.3	8.4	8.2	7.6	7.9	7.7	7.8	7.4	8.3	8.3	8.4	8.4	8.1

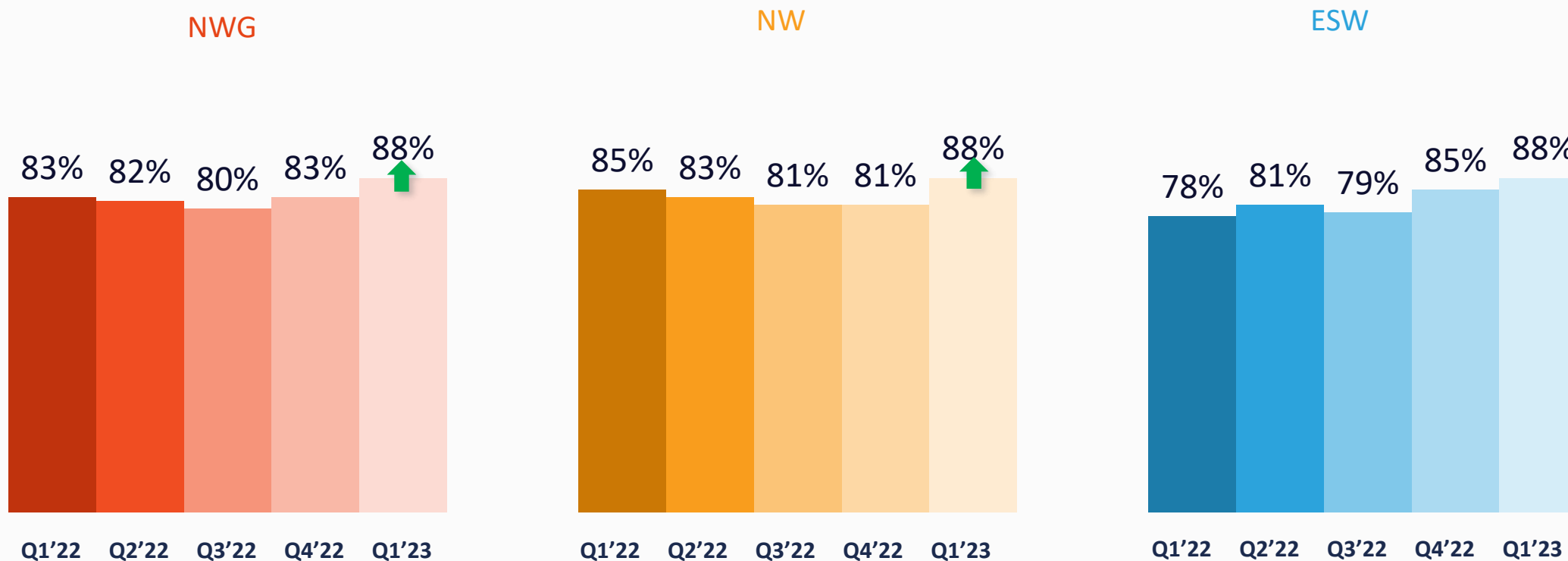
Q12 Thinking now about your overall impressions of [Northumbrian Water/Essex & Suffolk Water], to what extent would you agree or disagree with the following statements? Please use a scale of 0 to 10, this time where 0 is strongly disagree and 10 is strongly agree. Base NWG (500), NW (316), ESW (184)

Information and services



Information and services access

% Received all information wanted, to feel informed

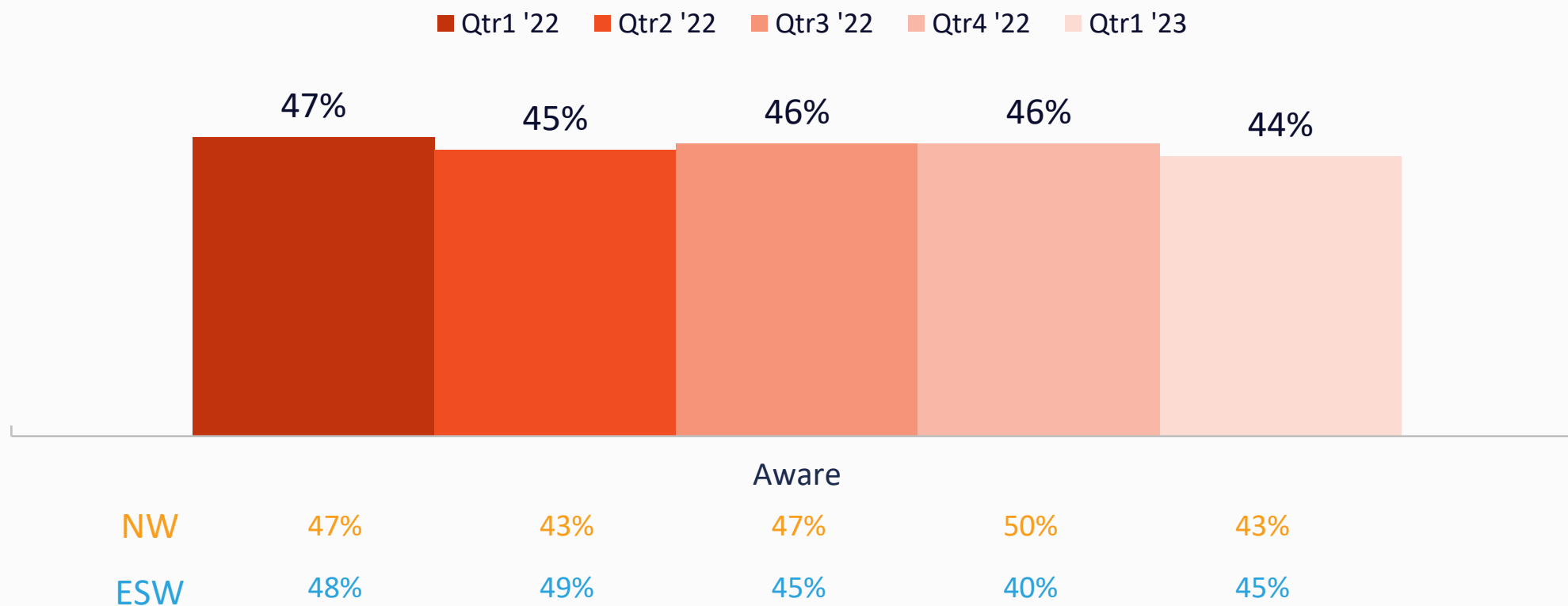


Priority services



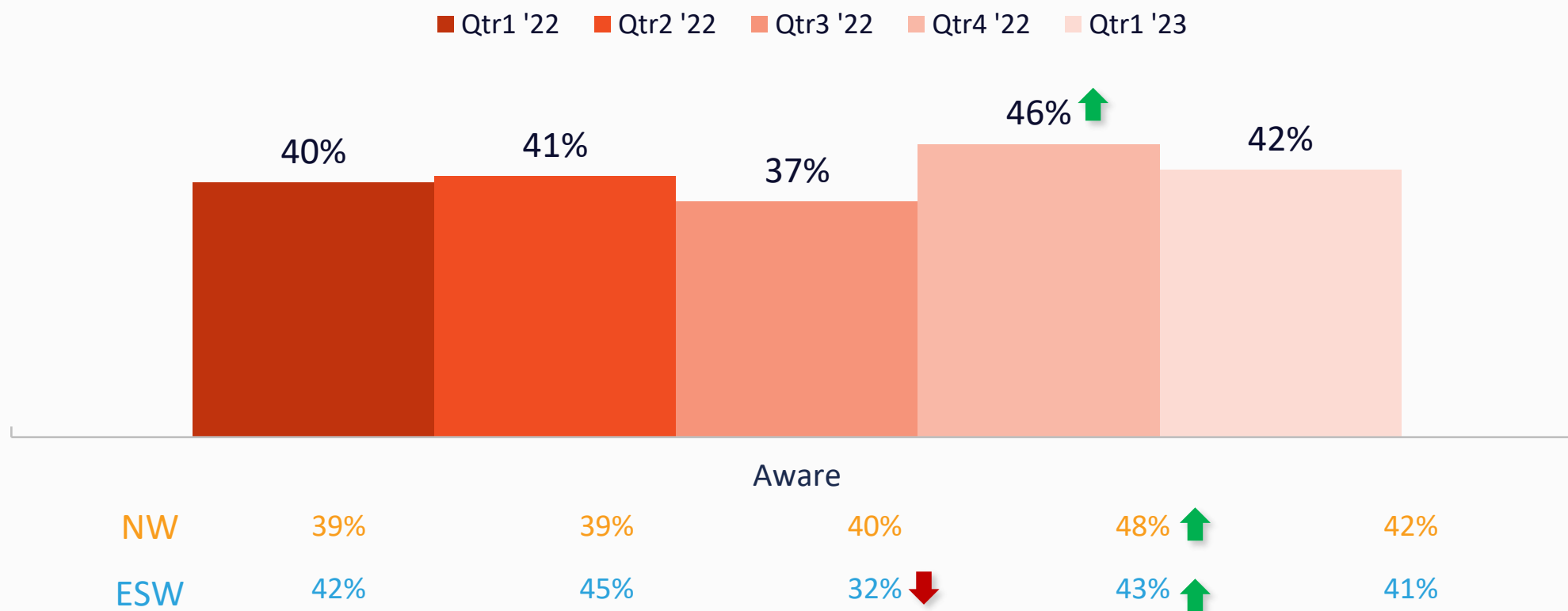
Priority services (1)

Awareness of additional support services



Priority services (2)

Awareness of additional financial services



Waterside Parks



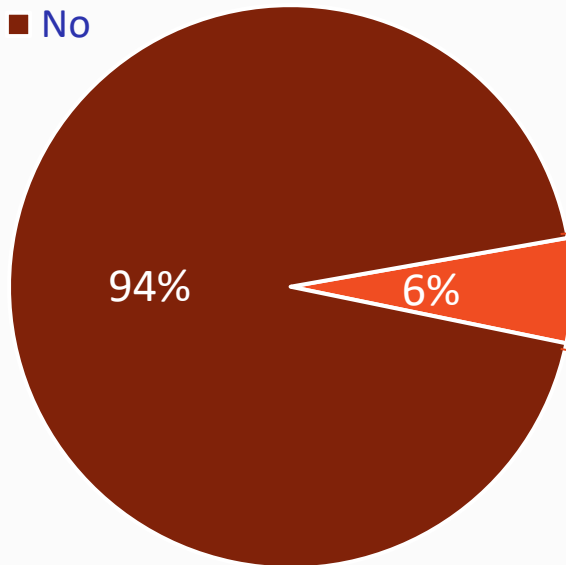
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Waterside Parks

Visited a Waterside Park in last 12 months

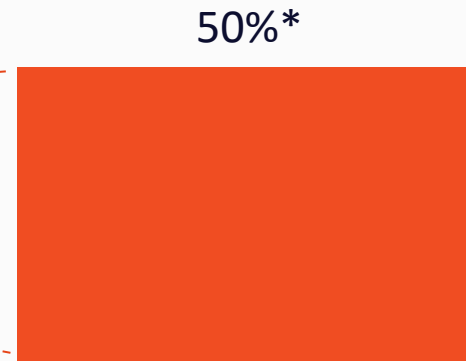
■ Yes ■ No



NW 6%

ESW 7%

(Positive) Influence of Waterside Park on score



*Caution low base size (32)

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 (316), ESW (184) 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 (32), NW (19), ESW (13)

Key headlines



NPS this quarter

NWG NPS is seeing a steady decline over the course of the last few quarters. This is predominantly driven by NW; ESW scores are more volatile likely because of the smaller sample size.



Overall satisfaction

Overall satisfaction has significantly declined compared to Qtr4 '22 (8.6), which is driven by falls in both the NW and ESW regions.



Reliable supply

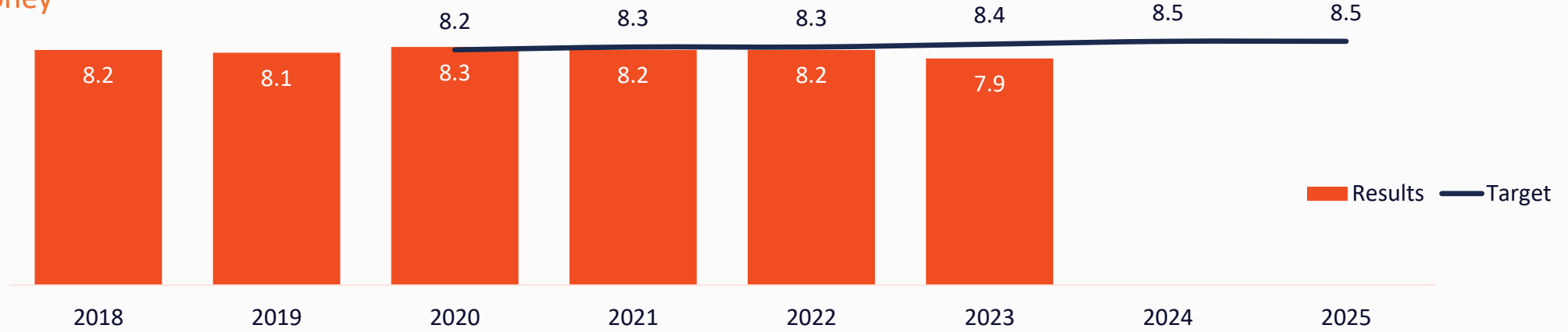
Significant falls have occurred since last quarter in satisfaction with NWG providing a reliable supply, clean and clear water and an effective sewerage service.

Progress and targets

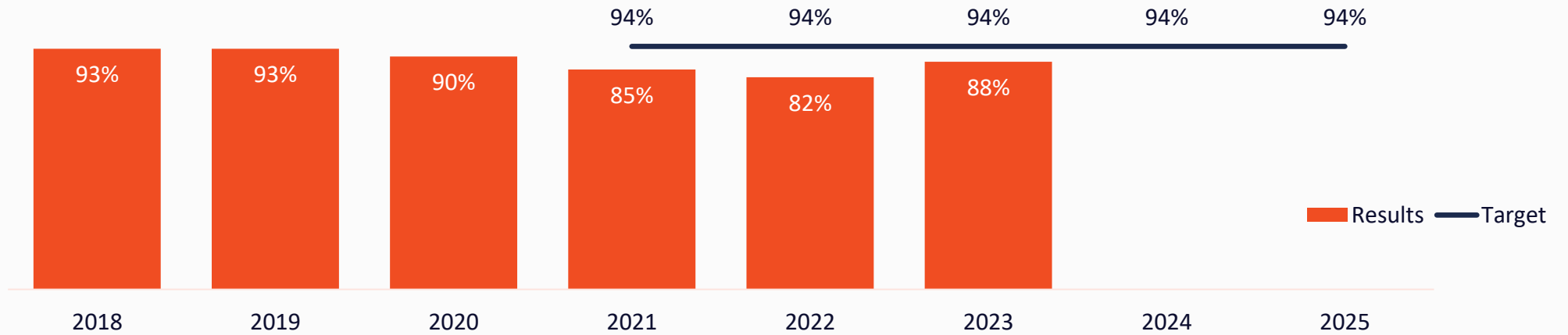


Progress towards targets – Business Plan Outcome

Value for money

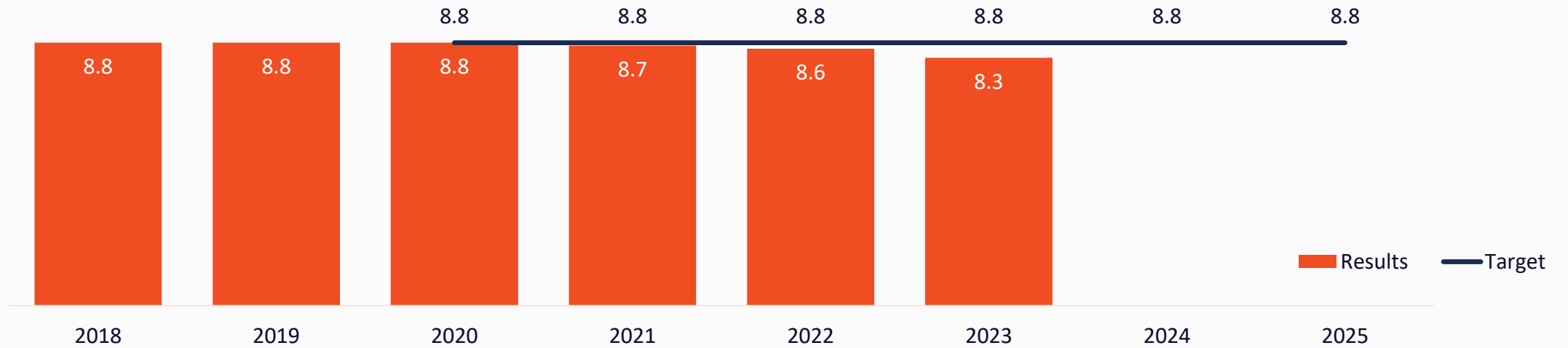


Rec'd all info wanted



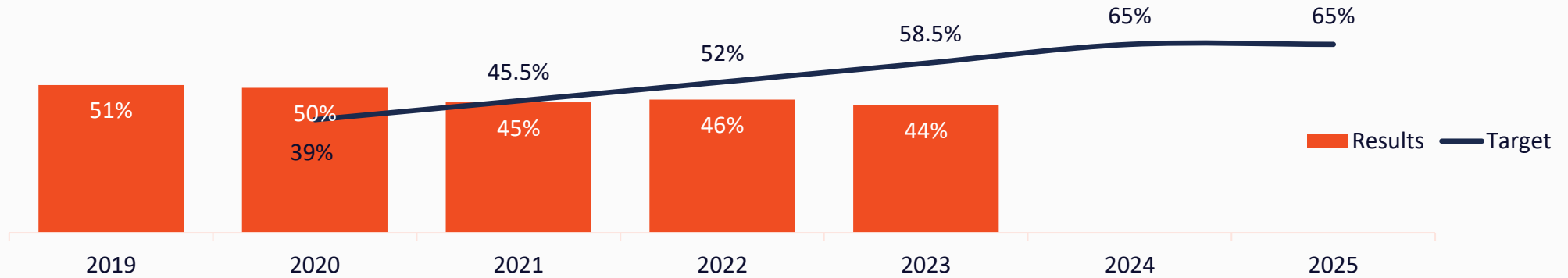
Progress towards targets – Performance Commitment

Trust

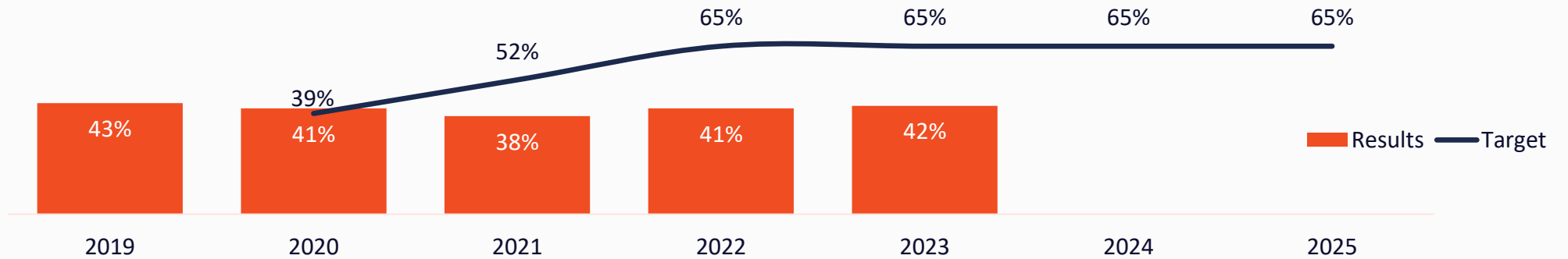


Progress towards targets – Performance Commitment

Awareness of non-financial support services

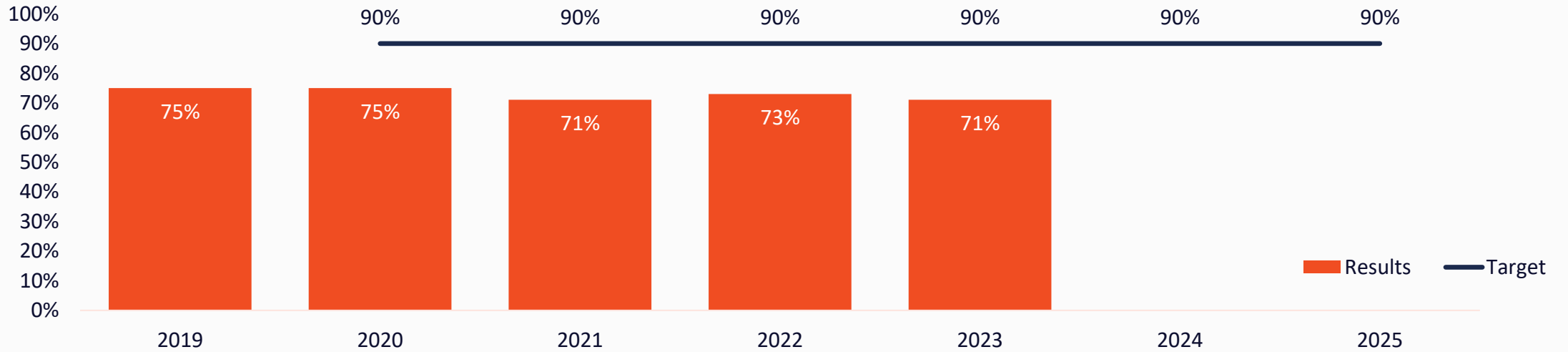


Awareness of financial support services



Progress towards targets – Ambitious Goal

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



The image features a dark blue background that transitions into a vibrant orange gradient on the right side. On the left, 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.

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