



10 / 06 / 21

# Domestic Tracker Results: Quarter 2 2021

Our ref. J8154.1



DEFINING THE **CLEAREST** DIRECTION

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## Domestic Tracker

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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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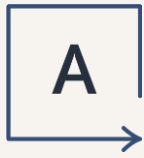
## Approach

- Carried out by phone
- 500 interviews per quarter
- Sample provided by NWG and TPS-screened before use
- Quotas set to achieve:
  - 316 NW, 184 ESW \*
  - Gender and age to match the homeowner population

Qtr2 2021

Fieldwork carried out:  
14 May – 1 June 2021

- \* Quotas reflect the NWG customer population:
- 63% North
  - 31% Essex
  - 6% Suffolk



## Significance testing

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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.

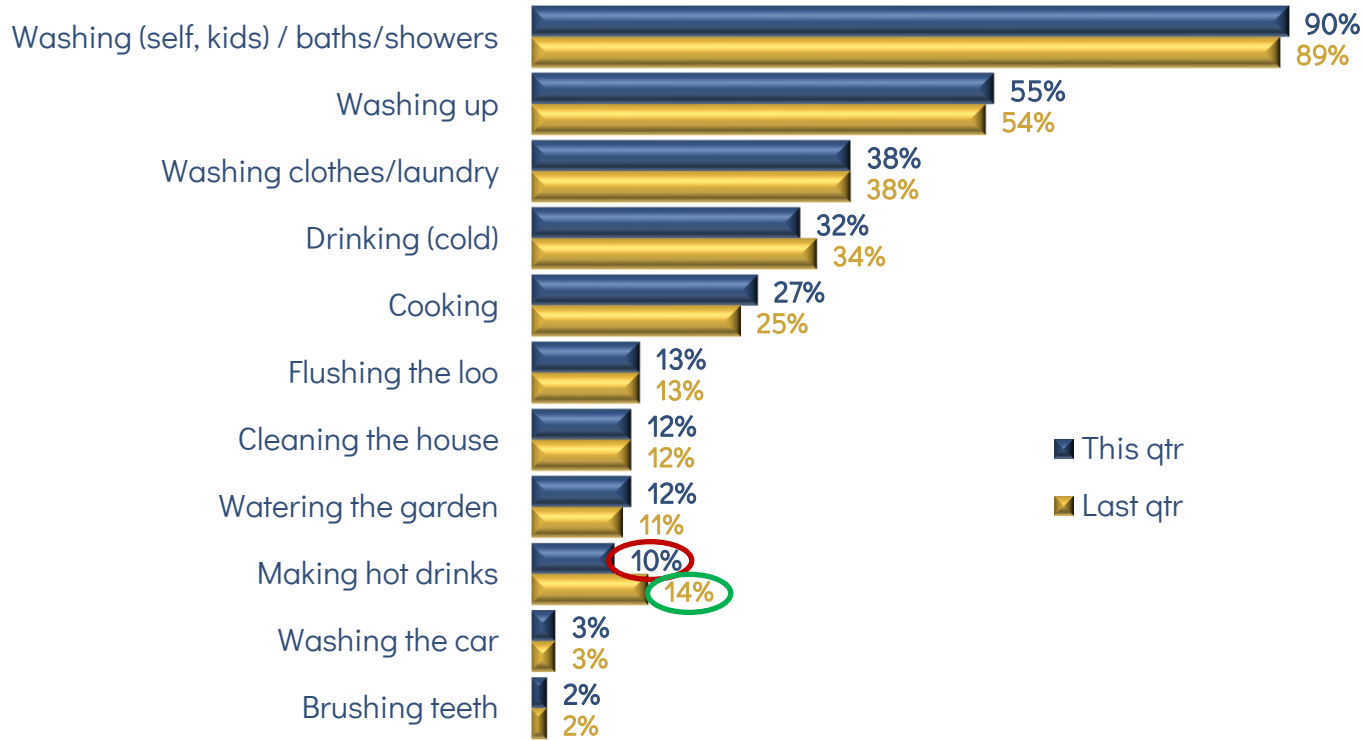
If a result this quarter is significantly different to any previous quarter, then the **significantly higher** result is shown in this report circled in green, and the result it is significantly **higher than** is shown circled in red.

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.

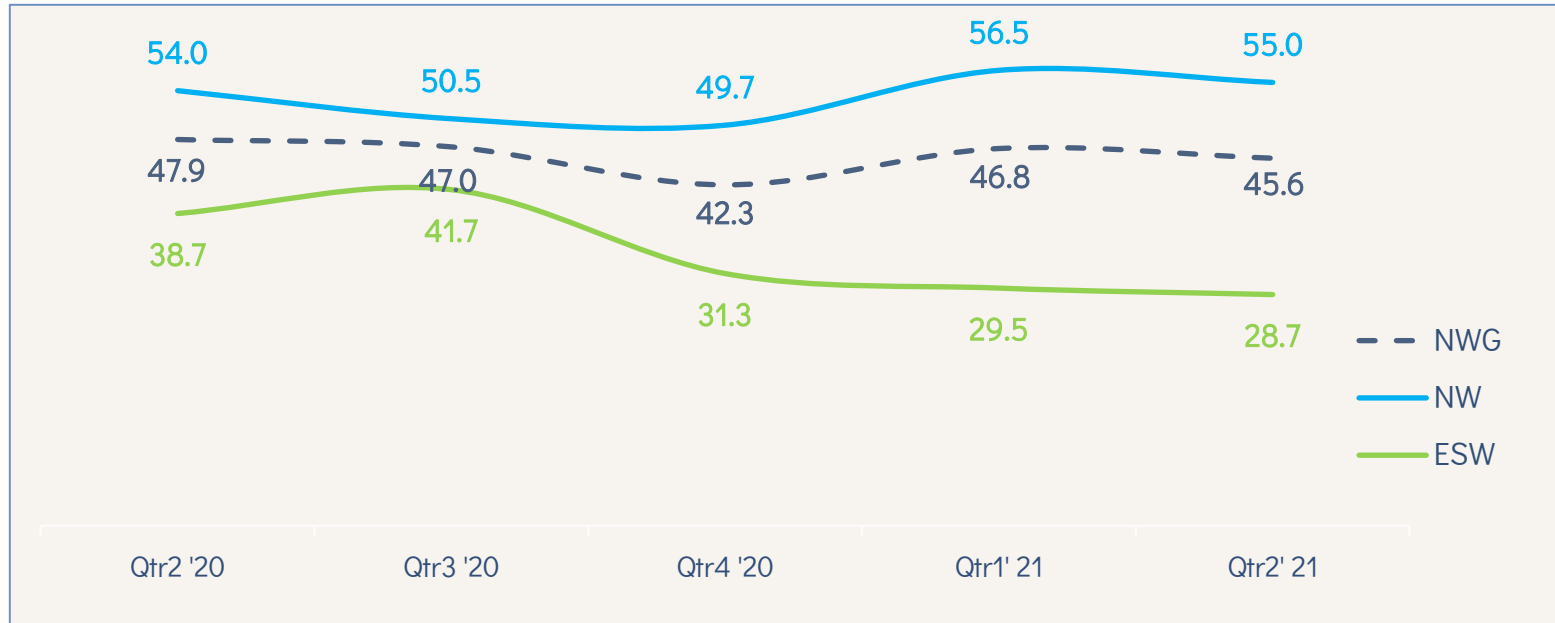


# First 3 things that come to mind, when thinking about using water at home





## NPS since this quarter last year



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## Top reasons for NPS scores this wave

### Promoters (scores of 9-10) - 278 customers

- No problems (59%)
- No supply problems (12%)
- Good customer service (11%)
- Been with them for years (11%)
- Good water quality (11%)
- Good company/do a good job (9%)
- Informed of/alerted to issues (8%)
- Good experience/happy with them (7%)
- Helpful (7%)
- Good value/fair price (6%)
- Quick response/resolution (5%)
- Good communication/updates (4%)
- Deal with issues (4%)
- Polite/friendly staff/workmen (3%)
- Resolve problems (2%)
- Good billing system (2%)
- Easy to contact (2%)
- Understanding/sympathetic (2%)

### Passives (scores of 7-8) – 121 customers

- No problems (46%)
- Good customer service (12%)
- OK/fine/satisfied (8%)
- No supply problems (7%)
- Expensive (7%)
- Good experience/happy with them (7%)
- Good company/do a good job (7%)
- Good value/fair price (6%)
- Informed of/alerted to issues (6%)
- Been with them for years (5%)
- Quick response/resolution (4%)
- Good communication (3%)
- Good water quality (3%)
- Reliable/trustworthy (3%)
- Nothing to compare against/no choice/had no real dealings with them (17%)

### Detractors (scores of 0-6) – 66 customers

- Expensive (15%)
- Neutral/indifferent (12%)
- Improvements needed with billing system (9%)
- Poor experience with them (8%)
- Poor water quality (3%)
- OK/fine/satisfied (3%)
- No supply problems (3%)
- Problem not resolved (3%)
- Slow to respond (3%)
- Made mistakes (3%)
- Nothing to compare against/no choice/had no real dealings with them (35%)



## Top improvements to give a higher score

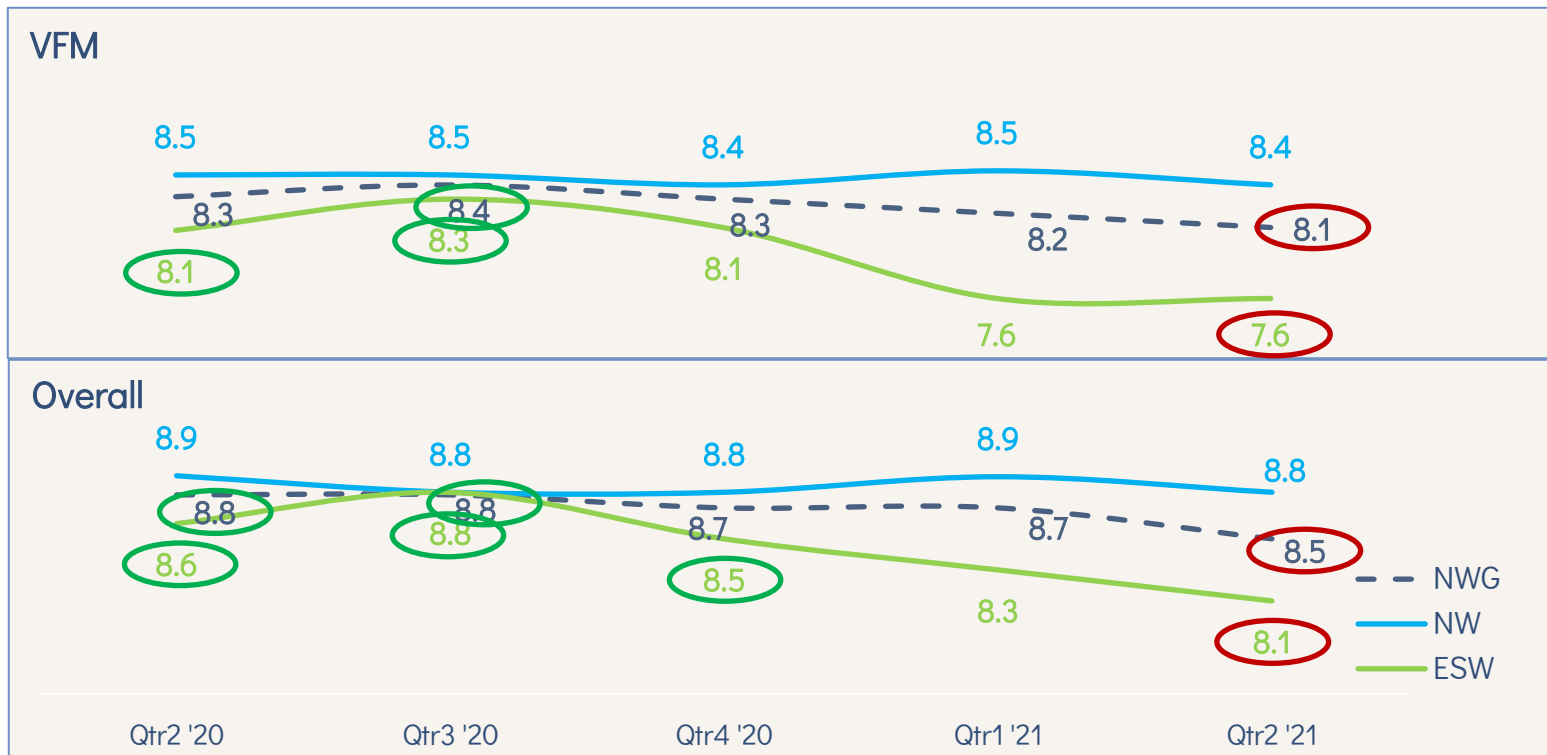
### Non-Promoters (scores of 0-8) - 187 customers

- Reduce cost (28%)
- Improve water quality/taste/smell (9%)
- More accurate bills/fewer estimated bills (5%)
- Repair leaks (more quickly) (4%)
- Better ongoing maintenance of sewers/pipes (4%)
- More water saving ideas/gadgets (3%)
- Keep customer informed of progress on issues raised (2%)
- Let customers decide on having a meter (or not) (2%)
- Improve customer service (2%)
- Respond quicker to contact/return calls (2%)
- More information on services/what the company does (2%)
- Quicker issue resolution (2%)



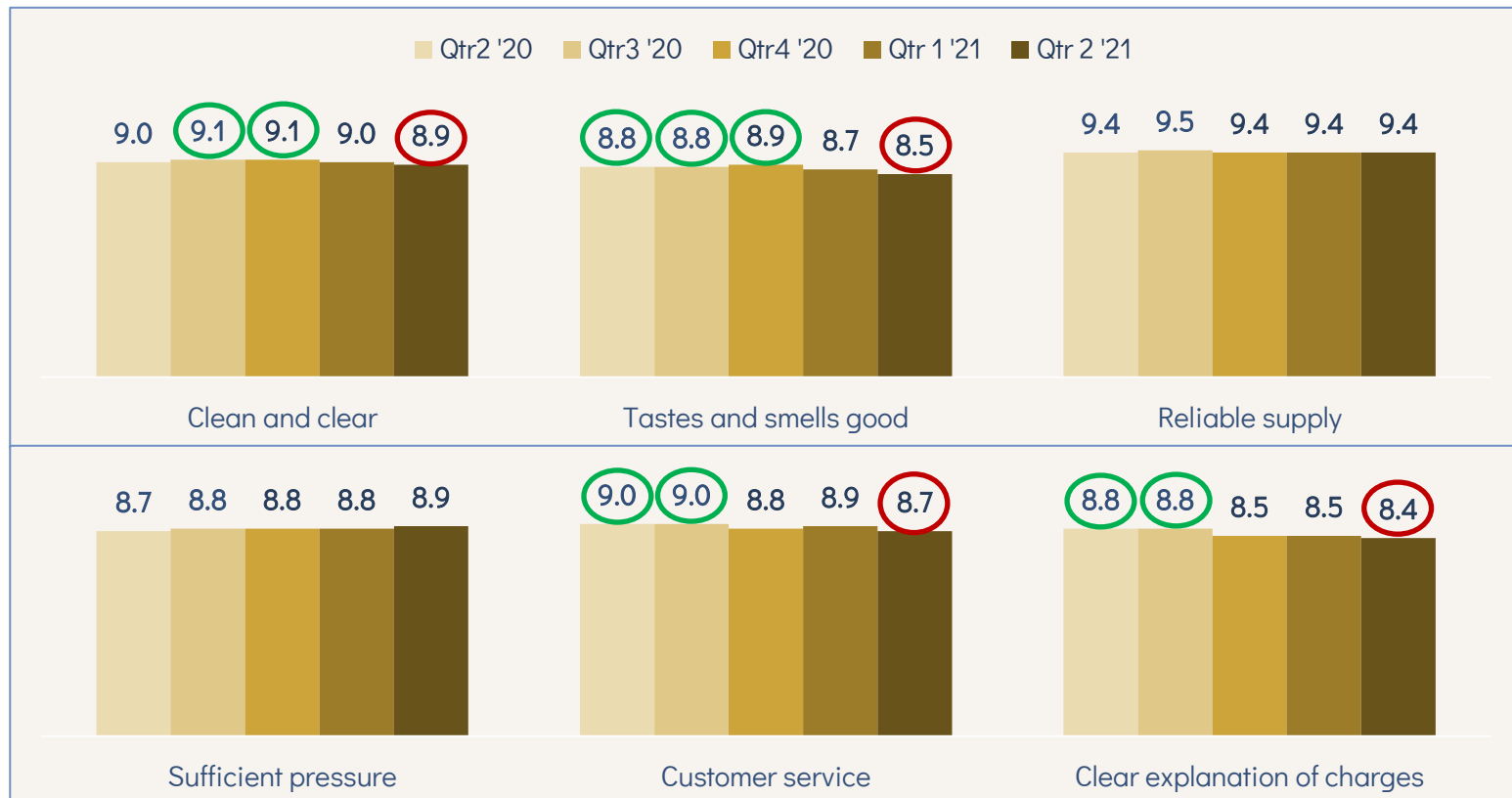
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# Overall satisfaction and with Value for Money, since this quarter last year





# Service satisfaction 1 (NWG)



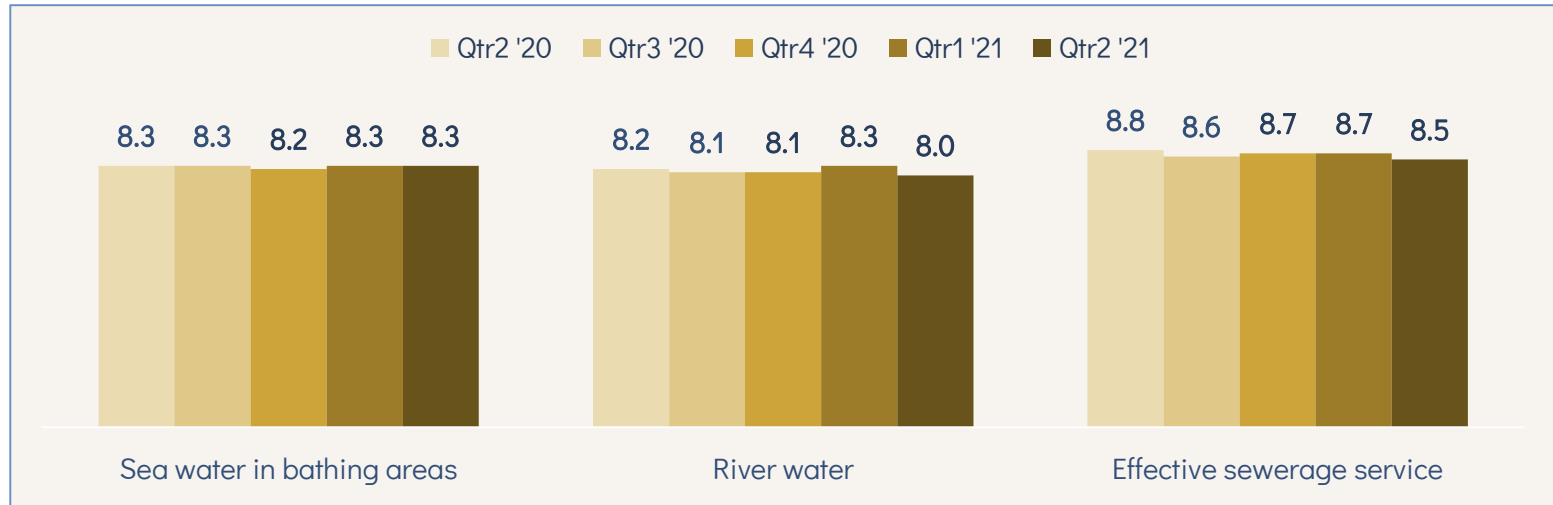
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## Service satisfaction 1 (by region)

| Clean and clear              | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
|------------------------------|----------|----------|----------|----------|----------|
| NW                           | 9.2      | 9.1      | 9.2      | 9.1      | 9.1      |
| ESW                          | 8.7      | 9.2      | 9.0      | 8.7      | 8.6      |
| Tastes and smells good       | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                           | 9.0      | 8.8      | 9.0      | 8.8      | 8.7      |
| ESW                          | 8.5      | 8.8      | 8.7      | 8.6      | 8.1      |
| Reliable supply              | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                           | 9.5      | 9.5      | 9.5      | 9.5      | 9.4      |
| ESW                          | 9.3      | 9.5      | 9.3      | 9.2      | 9.2      |
| Sufficient pressure          | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                           | 8.9      | 8.9      | 9.0      | 8.9      | 9.0      |
| ESW                          | 8.5      | 8.7      | 8.6      | 8.5      | 8.6      |
| Customer service             | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                           | 9.1      | 9.0      | 8.9      | 9.1      | 8.9      |
| ESW                          | 8.8      | 8.9      | 8.6      | 8.4      | 8.2      |
| Clear explanation of charges | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                           | 8.8      | 8.8      | 8.7      | 8.8      | 8.6      |
| ESW                          | 8.7      | 8.7      | 8.3      | 8.1      | 8.0      |



## Service satisfaction 2 (NW)





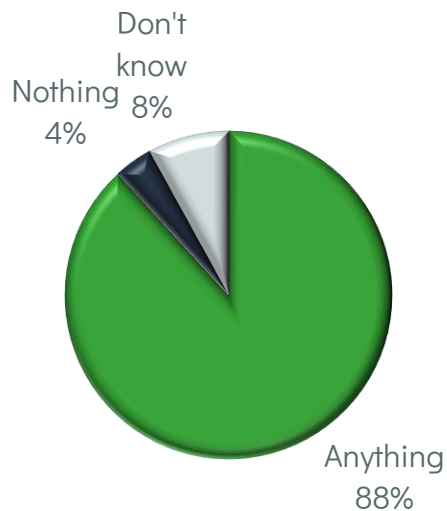
## Top improvements required on service issues

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

- Improve quality/taste/smell of water (28%)
- More detail/clarity on charges (12%)
- Better ongoing sewer/pipes maintenance (10%)
- Improve water pressure (7%)
- Reduce prices (7%)
- More information on their services (7%)
- Cleaner rivers (6%)
- Replace old infrastructure/improve capacity (6%)
- Cleaner beaches (4%)
- More accurate bills (4%)
- Better communication / more updates (3%)
- Quicker resolution of problems (3%)
- Listen to customers/do as they ask (2%)
- Improve flood defences (2%)
- Repair leaks (more quickly) (2%)
- Fix re-occurring problem (2%)
- Be more open/honest (2%)

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## What the company does well



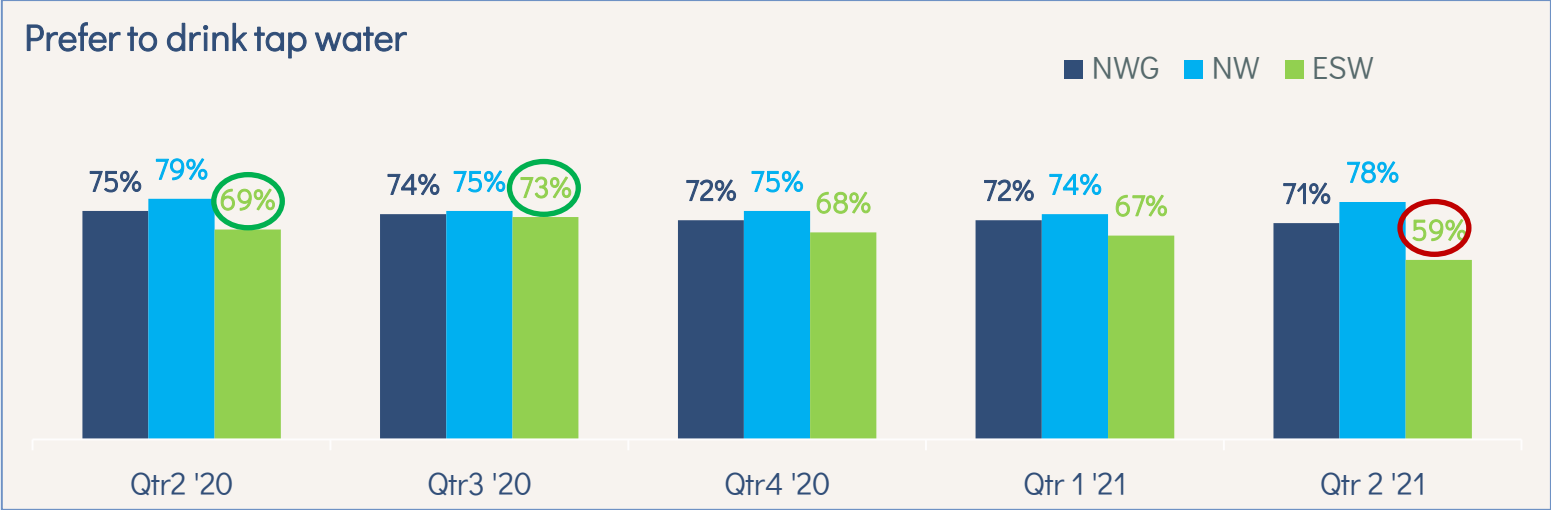
### All respondents - 500 customers

- Reliable supply of water (45%)
- Good quality water / tastes/smells good (17%)
- Helpful/friendly/professional call centre staff (6%)
- Notify customers if there are going to be works (6%)
- Respond quickly to issues/problems (5%)
- Never had any problem/never need to contact them (5%)
- Keep customers informed of progress on issues raised (5%)
- Good customer service (5%)
- Good water pressure (4%)
- Timely/accurate bills (4%)
- Good ongoing maintenance of sewers/pipes (3%)
- Provide good information on services (3%)
- Repair leaks quickly (2%)
- Fair prices (2%)
- Easy to contact (2%)
- Good website/online service (2%)



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

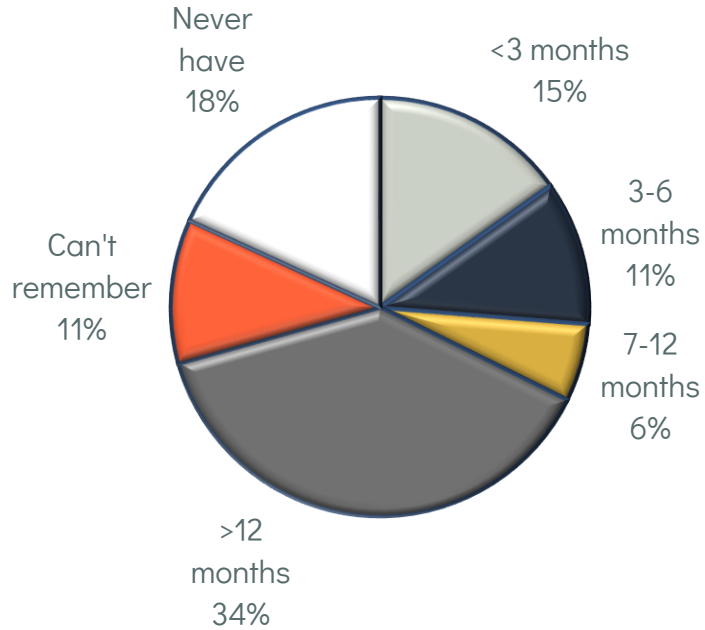
# Tap water preference



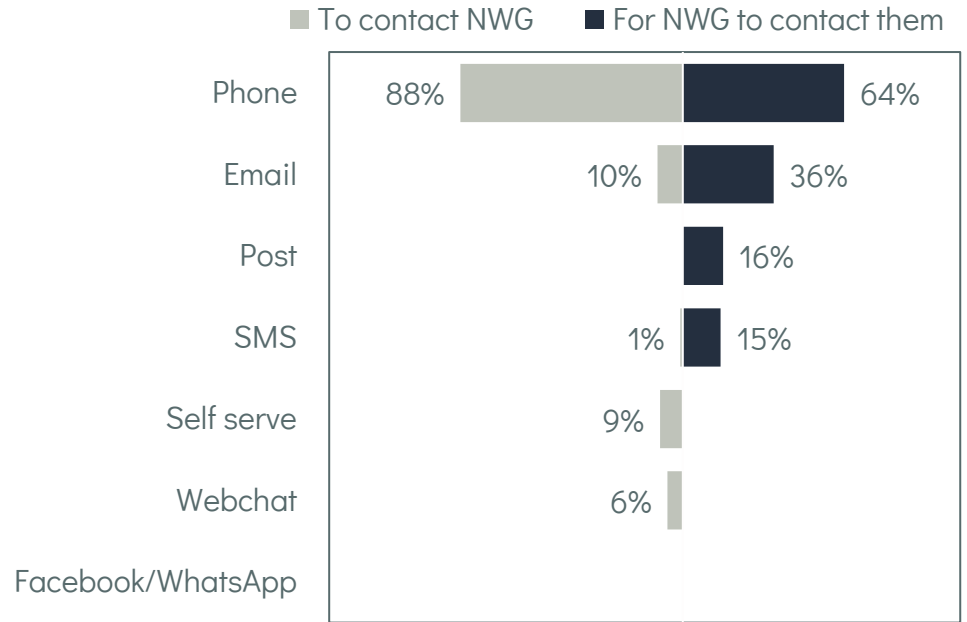


# Contact

### When last had contact with NWG



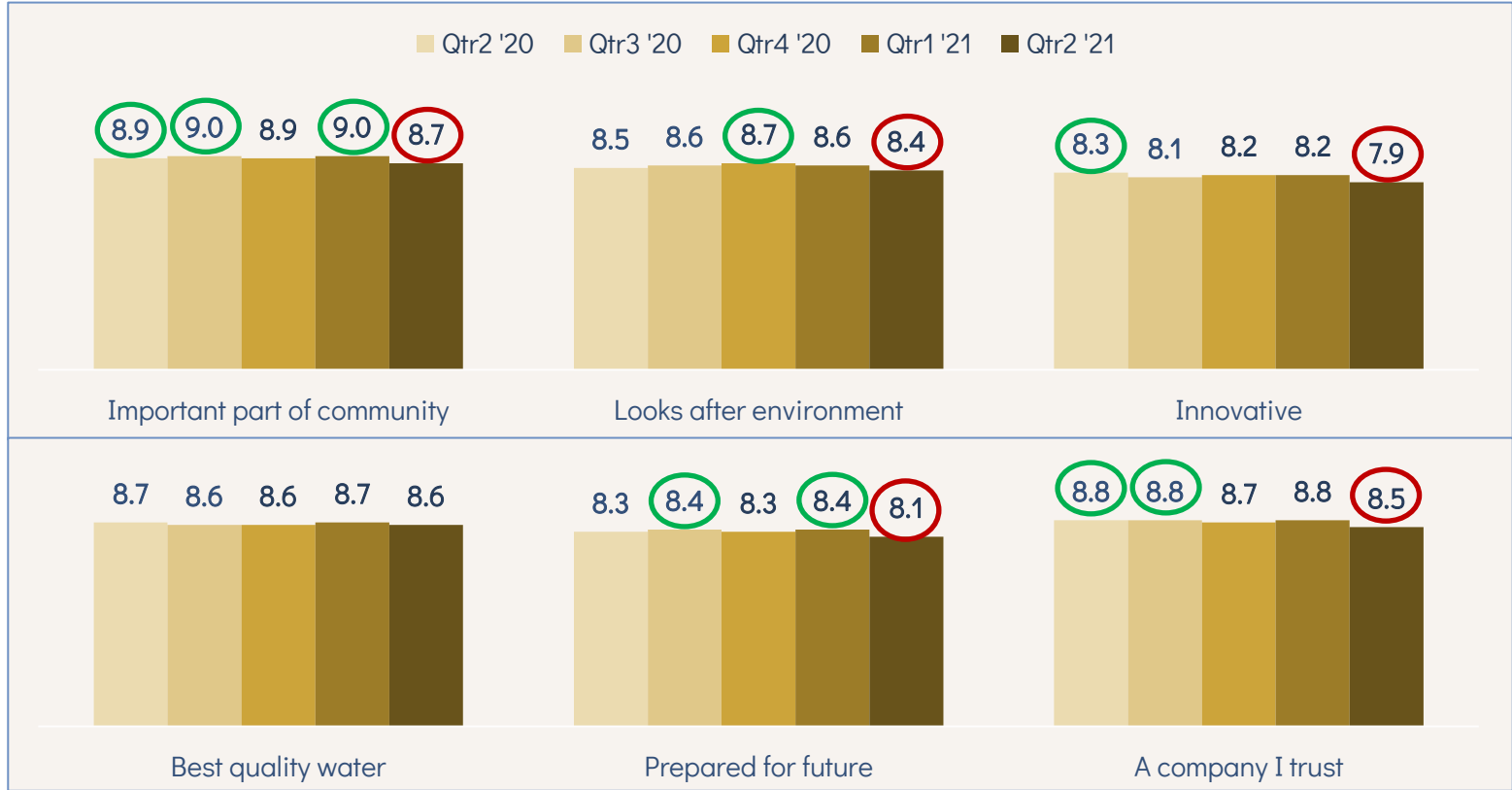
### Preferred contact methods





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# Brand values (NWG)



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## Brand values (by region)

| Important part of community | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
|-----------------------------|----------|----------|----------|----------|----------|
| NW                          | 9.1      | 9.0      | 9.1      | 9.1      | 8.9      |
| ESW                         | 8.7      | 9.0      | 8.6      | 8.9      | 8.4      |
| Looks after environment     | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                          | 8.7      | 8.6      | 8.8      | 8.7      | 8.6      |
| ESW                         | 8.3      | 8.5      | 8.4      | 8.4      | 7.9      |
| Innovative                  | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                          | 8.5      | 8.1      | 8.3      | 8.5      | 8.2      |
| ESW                         | 8.0      | 8.0      | 8.0      | 7.6      | 7.5      |
| Best quality water          | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                          | 8.9      | 8.7      | 8.9      | 8.9      | 8.9      |
| ESW                         | 8.4      | 8.5      | 8.2      | 8.2      | 7.9      |
| Prepared for future         | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                          | 8.4      | 8.4      | 8.5      | 8.6      | 8.4      |
| ESW                         | 8.1      | 8.3      | 8.1      | 8.1      | 7.6      |
| A company I trust           | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
| NW                          | 9.0      | 8.8      | 8.9      | 9.0      | 8.8      |
| ESW                         | 8.6      | 8.9      | 8.5      | 8.3      | 8.0      |

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## Comments relating to trust score

### All respondents - 500 customers

- Never had any problems – 27%
- No reason not to trust them – 17%
- Reliable water supply – 16%
- Good quality water – 11%
- Good customer service – 7%
- Deal with issues/problems – 7%
- Good reputation/don't hear anything bad – 7%
- Reliable – 7%
- Been with them a long time - 6%
- Happy with them – 5%
- Good communication - 4%
- Notify customers of any works/issues - 4%
- Good/fair price – 4%
- No real dealings/no reason – 9%
- No other option/monopoly – 6%

They adjust my payments according to my water usage, they always get in touch when they're going to change the payments to let you know when the payment is going to be.

You can speak to them easily if you have issues, and you can speak to them easier than you can other companies.

I follow them on social media, they give a lot of up to date information on when there's going to be work in the area, we're not kept in the dark.

The water they provide is not clean and it's not something I trust my kids to have a taste of.

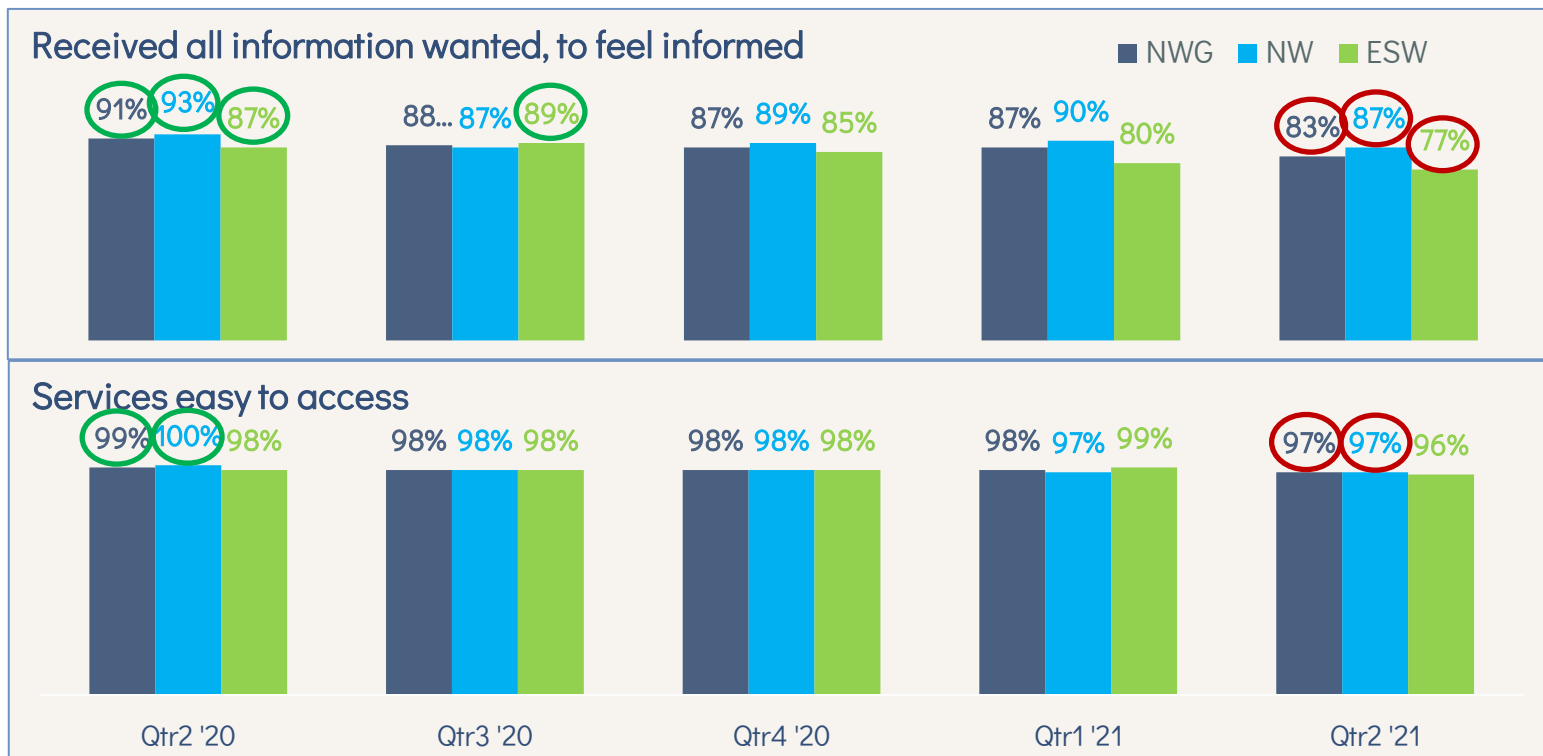
I have nothing to compare against, but all companies look after themselves first.

Well, they haven't got any competition have they? So they can just do whatever they want. I don't even know if they're providing a good service or not because they haven't got any competition. I've got nobody to compare them with or anything, how would I know? They've got kind of a monopoly haven't they?



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

## Information and service access



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14 customers think that services are not easy to access. Some examples:

Time waiting to get through to somebody.

When I was calling I was going backwards and forwards sometimes. I was going to a different department and they said we don't deal with it.

Communication is not good - you can't speak to people. If someone says they will get back to you they don't, otherwise you are kept on hold forever.

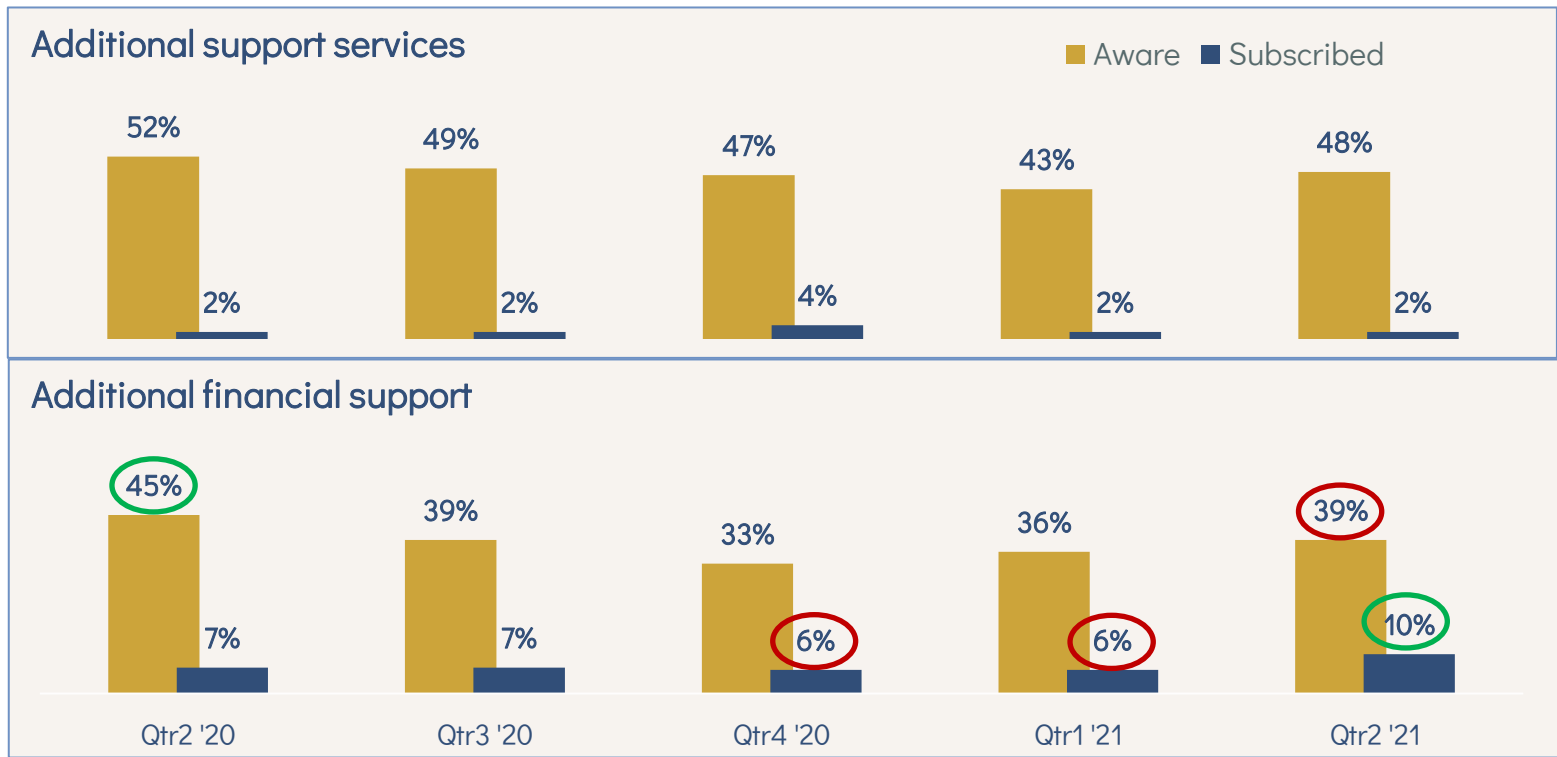
Because of the number of options when you call up, and the length of time it takes them to answer, they need more resources.

Because of all this stuff that's going on now, the pandemic. It's difficult to get people to come to the house and everyone's social distancing and all that.

The online account has too much to remember - additional security things to input once you have logged in.



## Priority services (NWG)



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## Priority services (by region)

| NW | Additional support services  | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
|----|------------------------------|----------|----------|----------|----------|----------|
|    | Aware                        | 53%      | 47%      | 50%      | 45%      | 49%      |
|    | Subscribed                   | 2%       | 1%       | 3%       | 3%       | 2%       |
|    | Additional financial support | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
|    | Aware                        | 45%      | 38%      | 32%      | 35%      | 39%      |
|    | Subscribed                   | 6%       | 8%       | 4%       | 5%       | 10%      |

| ESW | Additional support services  | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
|-----|------------------------------|----------|----------|----------|----------|----------|
|     | Aware                        | 52%      | 52%      | 43%      | 40%      | 46%      |
|     | Subscribed                   | 2%       | 3%       | 4%       | 2%       | 3%       |
|     | Additional financial support | Qtr2 '20 | Qtr3 '20 | Qtr4 '20 | Qtr1 '21 | Qtr2 '21 |
|     | Aware                        | 47%      | 40%      | 36%      | 39%      | 39%      |
|     | Subscribed                   | 8%       | 6%       | 10%      | 9%       | 9%       |

## HEADLINES

NPS this quarter – 45.6

Overall satisfaction 8.5  
and satisfaction with  
value for money 8.1

Trust this quarter – 8.5

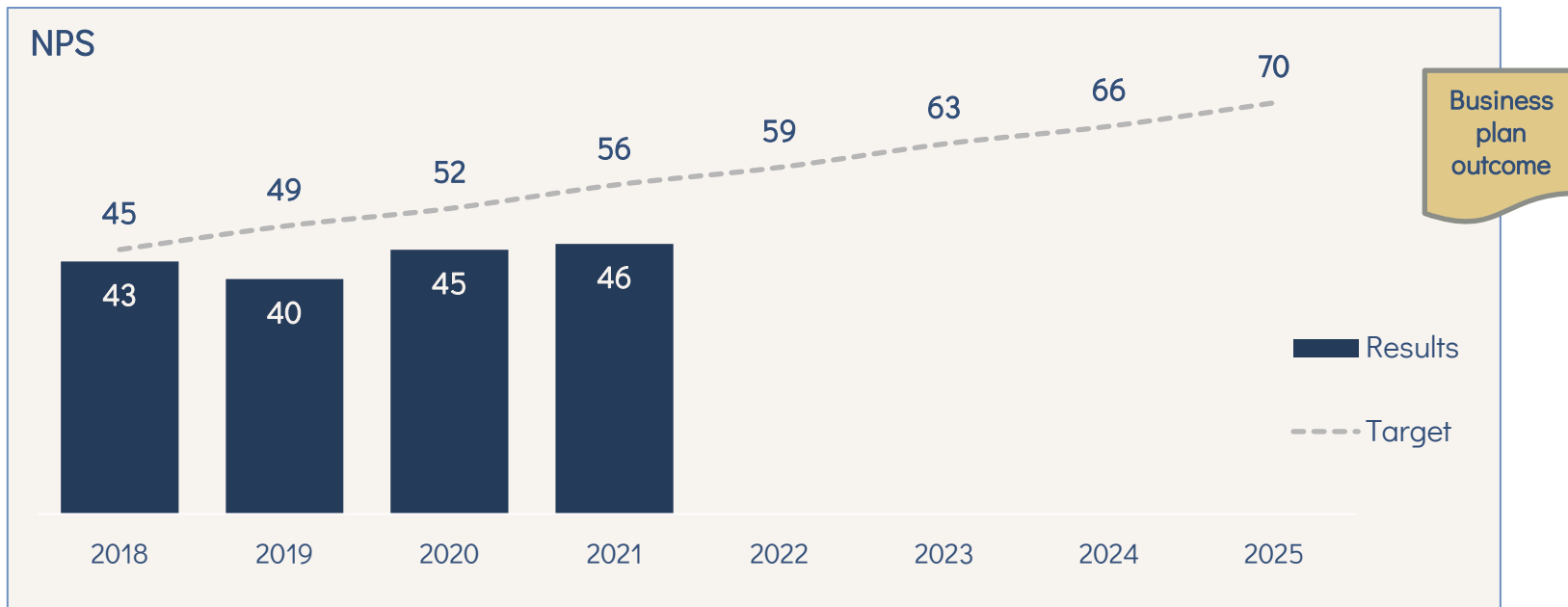
While the NPS measure has not changed significantly, most scores this quarter are down, especially in ESW. There have been large drops in satisfaction with water quality in ESW since last year, and this may have had a knock-on effect on overall perceptions

One measure has improved this quarter; take-up of additional financial support in NW is now at 10%



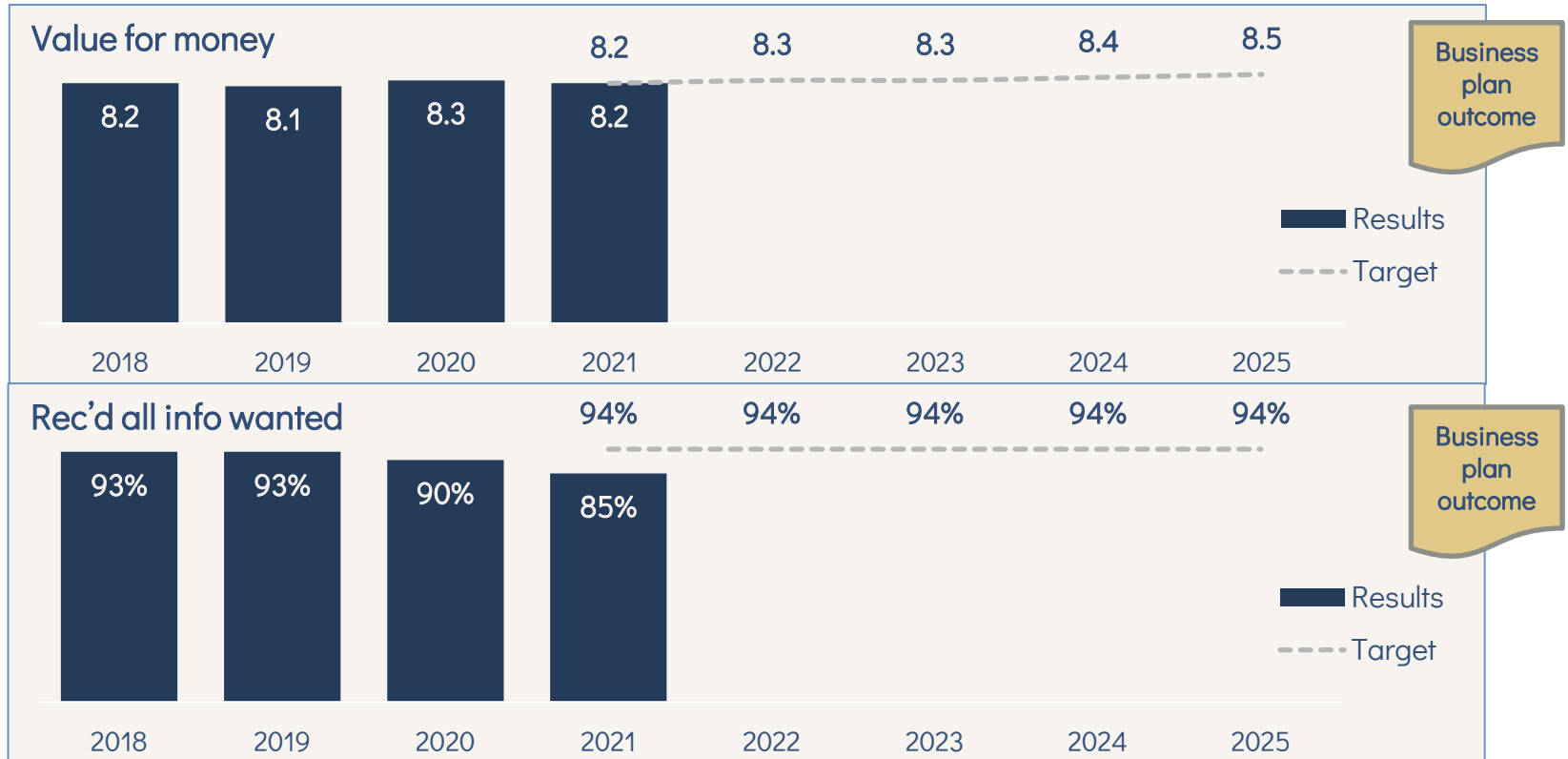
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## Progress towards targets, 1



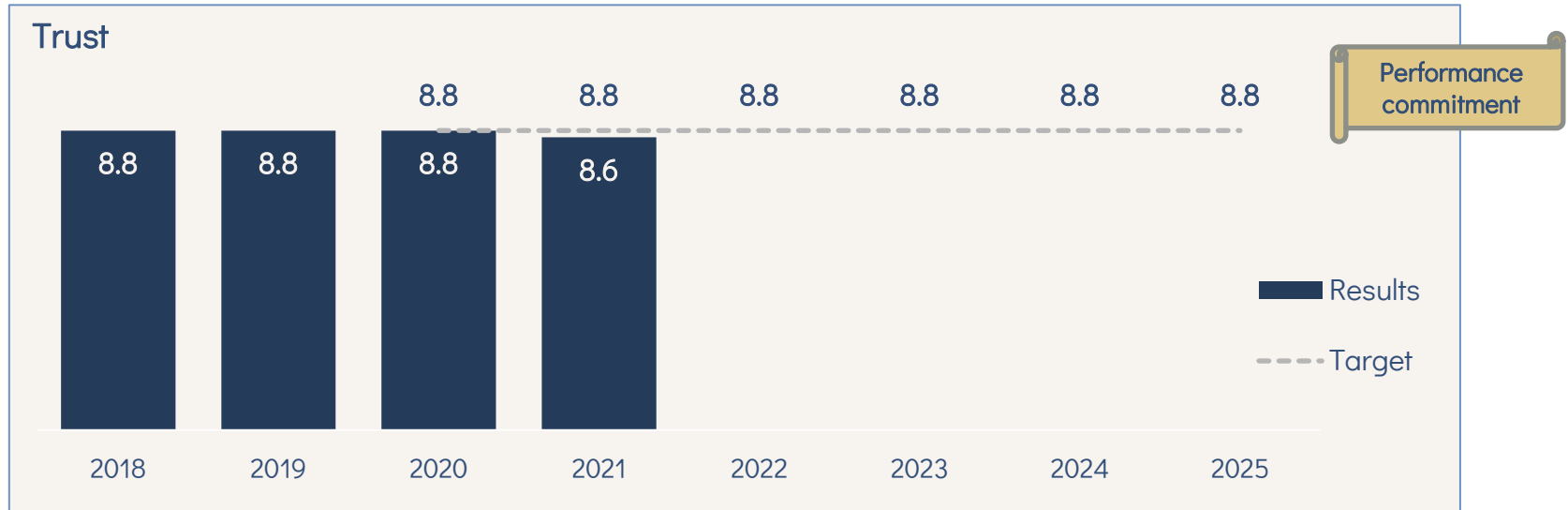
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## Progress towards targets, 2





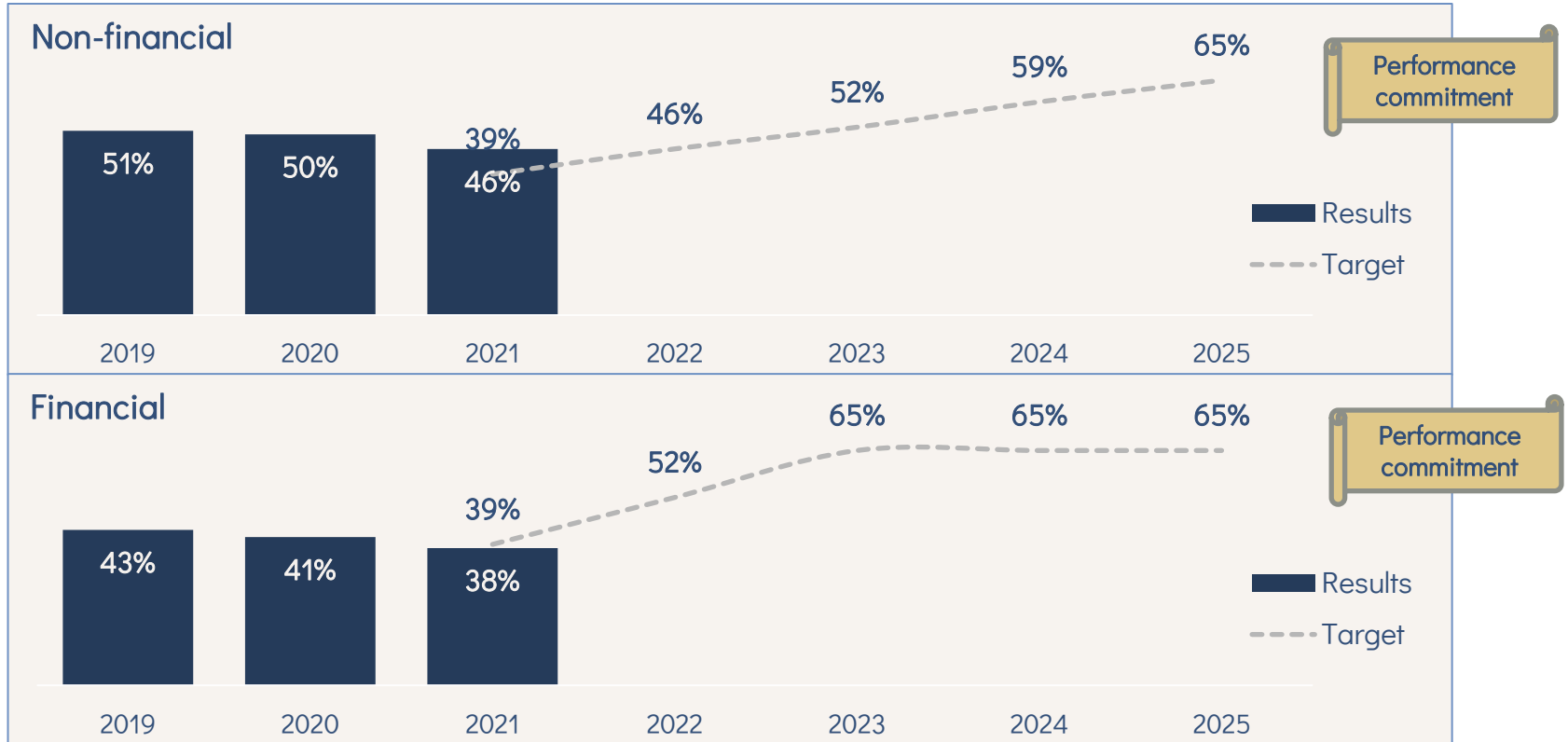
## Progress towards targets, 3



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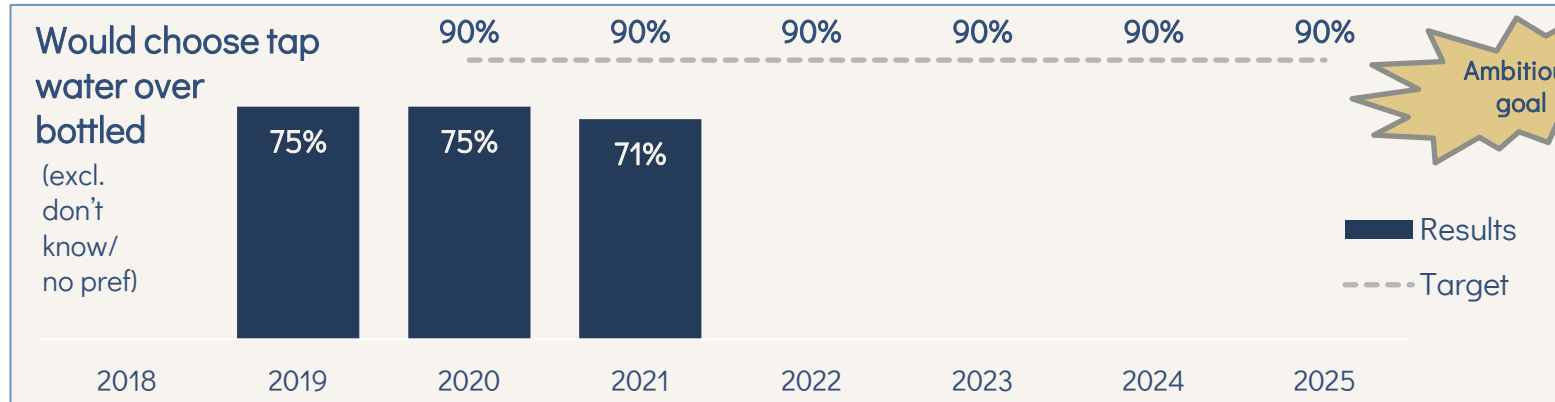
## Progress towards targets, 4

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

