



02 / 09 / 20

# Domestic Tracker Results: Quarter 3 2020

Our ref. J3065.2



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:
- 300 NW, 200 ESW
  - Gender and age to  
match the population

Qtr3 2020

Fieldwork carried out:  
29 July – 27 August 2020



## 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.

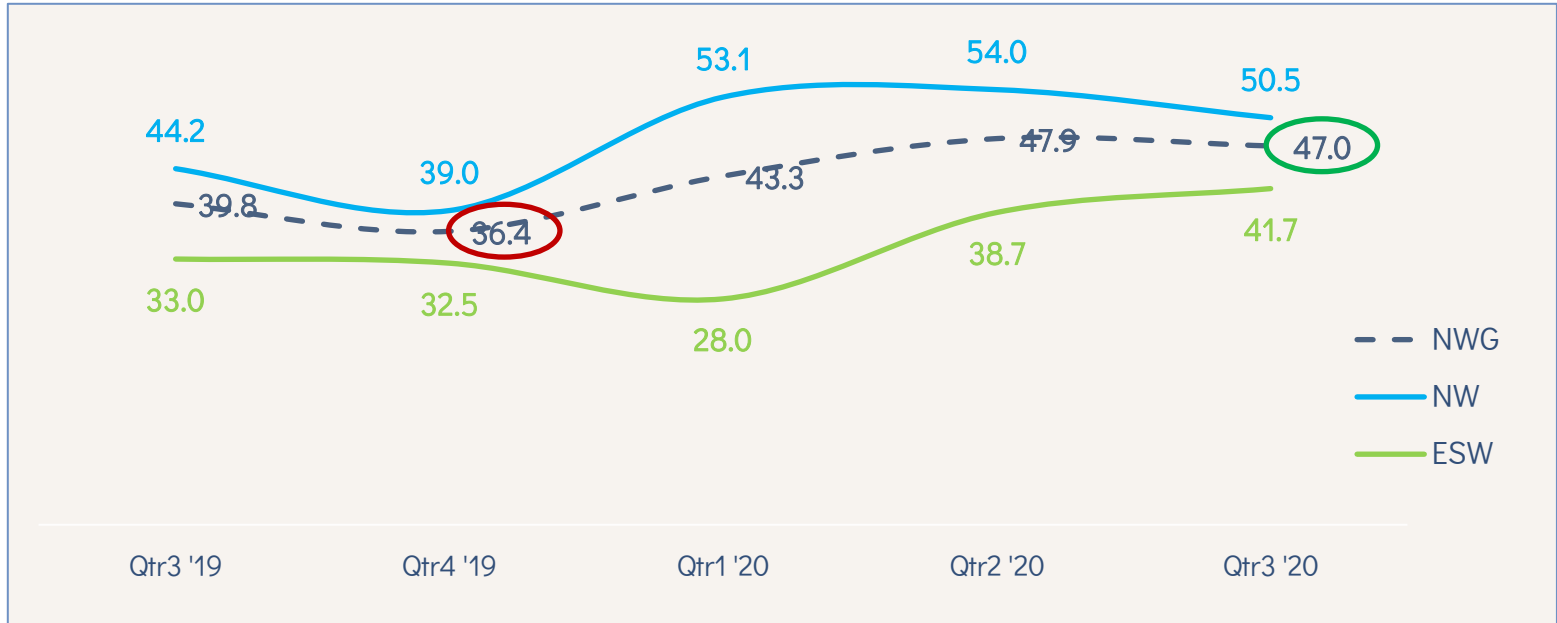
If a result this quarter is significantly different to any previous quarter, then the **significantly higher** result is shown in this report circled in green, and the result it is significantly **higher than** is shown circled in red.

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.



# NPS since this quarter last year



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## Top reasons for NPS scores this wave

### Promoters (scores of 9-10) - 283 customers

- No problems (68%)
- Good customer service (11%)
- Good company/do a good job (10%)
- No supply problems (10%)
- Good value/fair price (9%)
- Good experience/happy with them (9%)
- Helpful (8%)
- Quick response/resolution (7%)
- Been with them for years (7%)
- Good communication/updates (6%)
- Good water quality (5%)
- Resolve problems (4%)
- Responsive (4%)
- Deal with issues (4%)
- Timely/accurate billing (3%)

### Passives (scores of 7-8) – 135 customers

- No problems (46%)
- Good customer service (11%)
- Quick response/resolution (7%)
- No supply problems (7%)
- Good experience/happy with them (7%)
- Good/fair price (7%)
- Good company/do a good job (6%)
- OK/fine (6%)
- Good communication (5%)
- Helpful (4%)
- Always room for improvement (4%)
- Poor water quality (4%)
- Poor communication (4%)
- Nothing to compare against/no choice/had no real dealings with them (15%)

### Detractors (scores of 0-6) – 59 customers

- No problems (15%)
- Always room for improvement (15%)
- No supply problems (7%)
- Expensive (7%)
- Poor water quality (7%)
- Would look for best price (5%)
- OK/fine (5%)
- Don't recommend anyone/no-one to recommend to (5%)
- Good/fair price (3%)
- Good customer service (3%)
- Had poor experience with them (3%)
- Nothing to compare against/no choice/had no real dealings with them (37%)



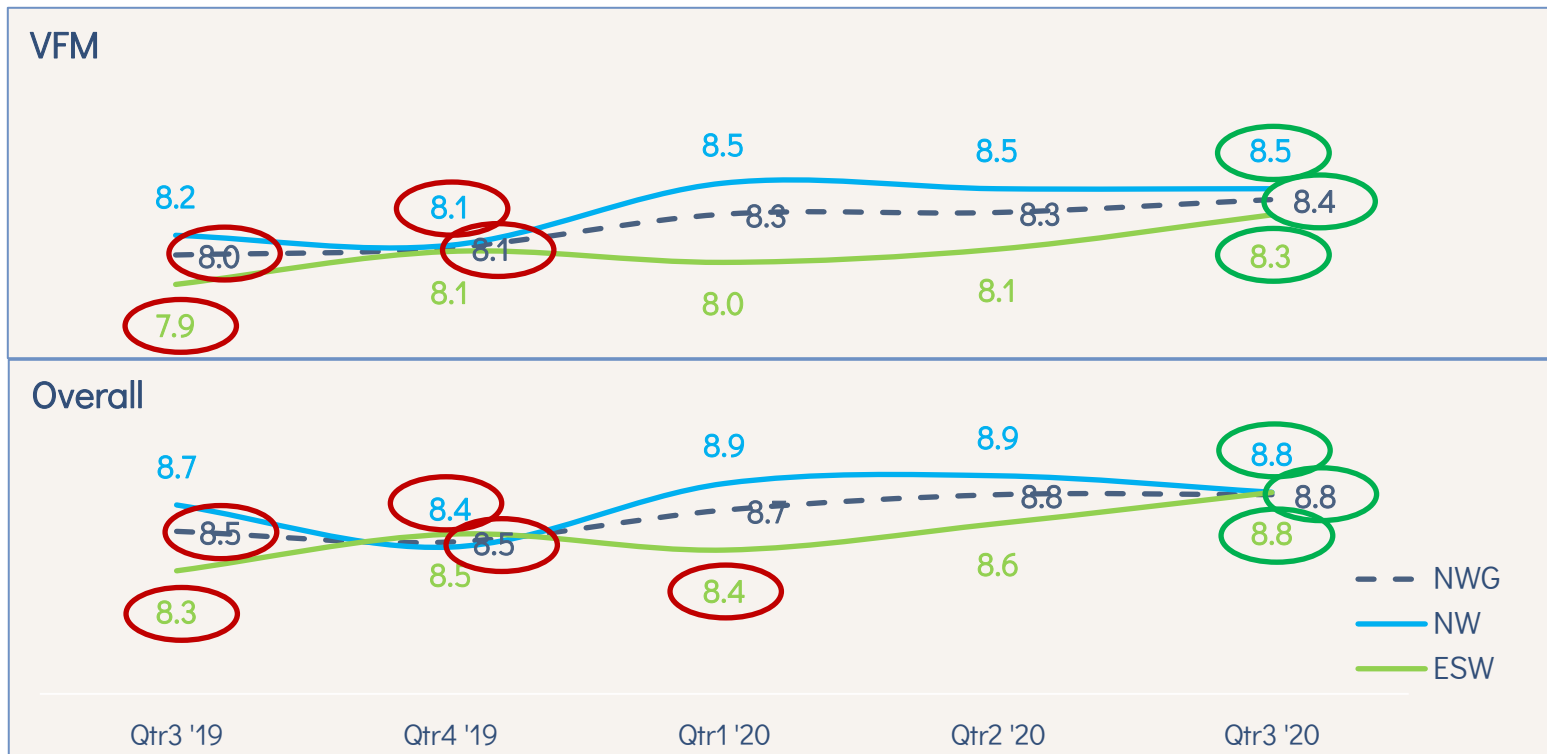
## Top improvements to give a higher score

### Non-Promoters (scores of 0-8) - 194 customers

- Lower prices (20%)
- Better quality water (5%)
- Better water pressure (4%)
- Better communication/return calls (3%)
- Make customers aware of services/what the company does (3%)
- Better billing system/fewer estimated bills (2%)
- Better sewer/pipes maintenance (2%)
- Quicker response (2%)
- Improve website/more services online (2%)
- More water savings ideas/advice/gadgets (2%)
- Ability to compare price against other companies (2%)

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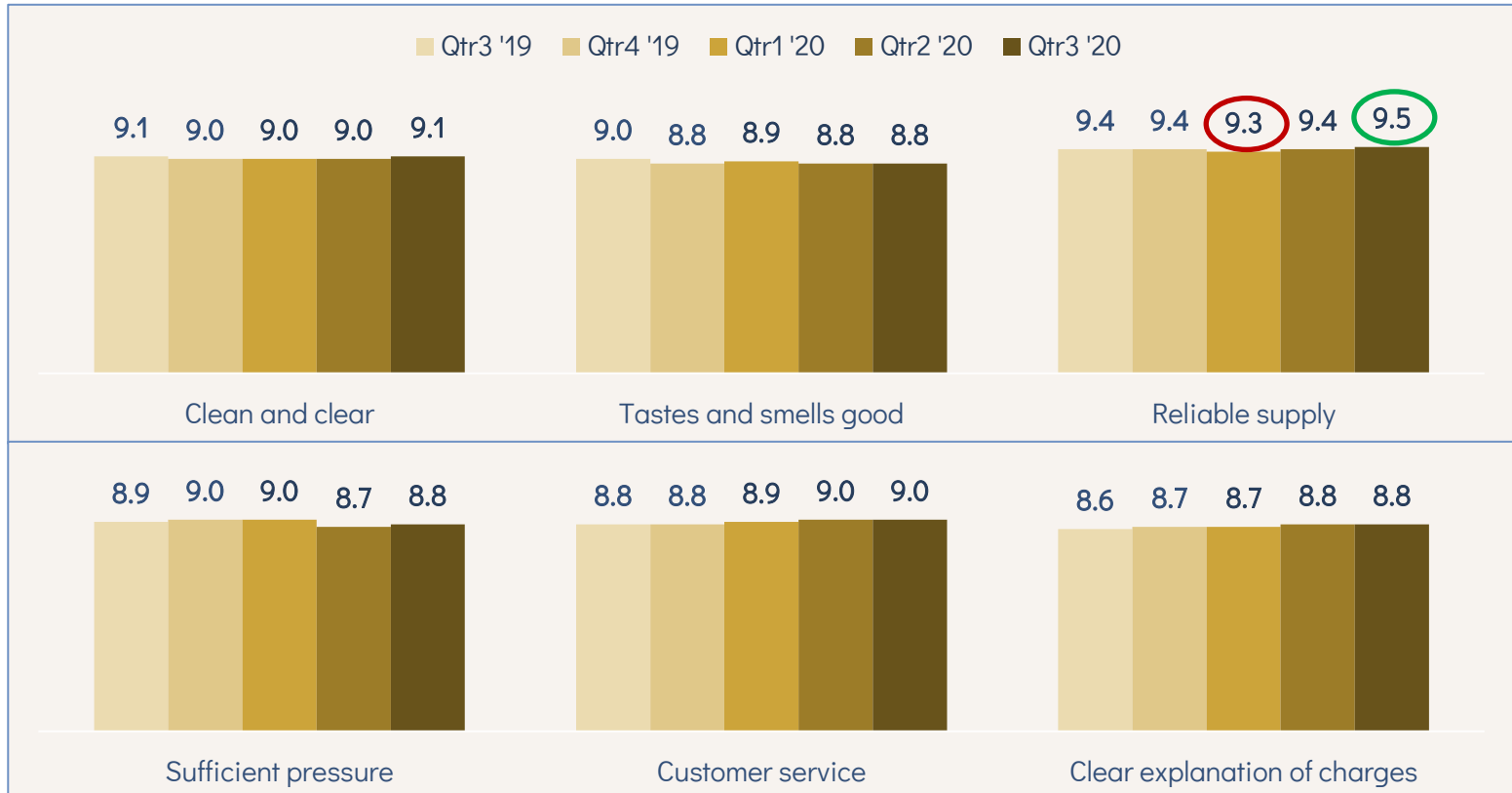
# Overall satisfaction and with Value for Money, since this quarter last year







# Service satisfaction 1 (NWG)



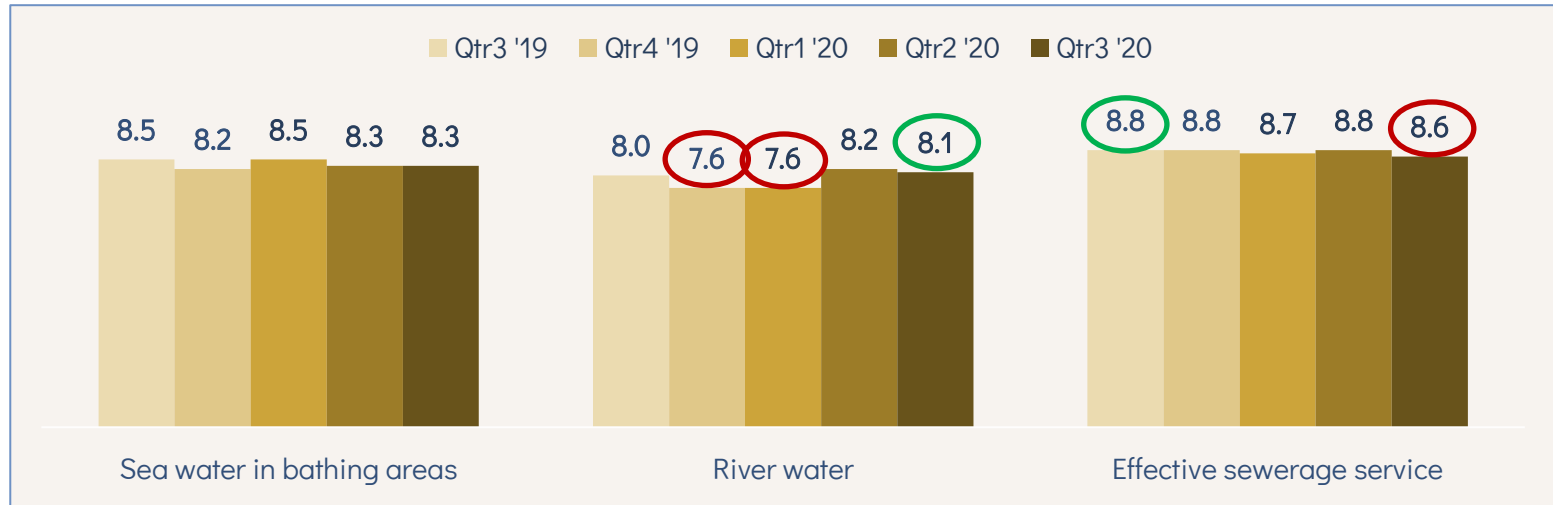
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## Service satisfaction 1 (by region)

Clean and clear	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	9.2	9.0	9.2	9.2	9.1
ESW	8.9	9.0	8.8	8.7	9.2
Tastes and smells good	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	9.1	8.8	9.1	9.0	8.8
ESW	8.8	8.8	8.6	8.5	8.8
Reliable supply	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	9.4	9.4	9.4	9.5	9.5
ESW	9.3	9.4	9.2	9.3	9.5
Sufficient pressure	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	9.0	9.1	9.2	8.9	8.9
ESW	8.8	8.8	8.7	8.5	8.7
Customer service	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	8.9	8.7	9.0	9.1	9.0
ESW	8.6	9.0	8.7	8.8	8.9
Clear explanation of charges	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	8.7	8.7	8.8	8.8	8.8
ESW	8.6	8.7	8.6	8.7	8.7



## Service satisfaction 2 (NW)





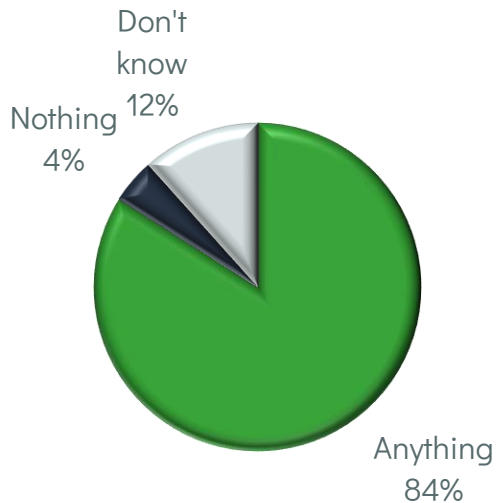
## Top improvements required on service issues

### Gave any low scores (0-6) - 143 customers

- Improve quality/taste of water (27%)
- Improve water pressure (19%)
- Cleaner rivers/beaches (15%)
- Provide/improve flood defences (8%)
- Better sewer/pipes maintenance (6%)
- More information on their services (4%)
- More detail/clarity on charges (4%)
- Replace old infrastructure/improve capacity (4%)
- Better communication (3%)
- Lower prices (2%)
- More accurate bills (2%)
- Deal with bad odours (2%)

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## What the company does well



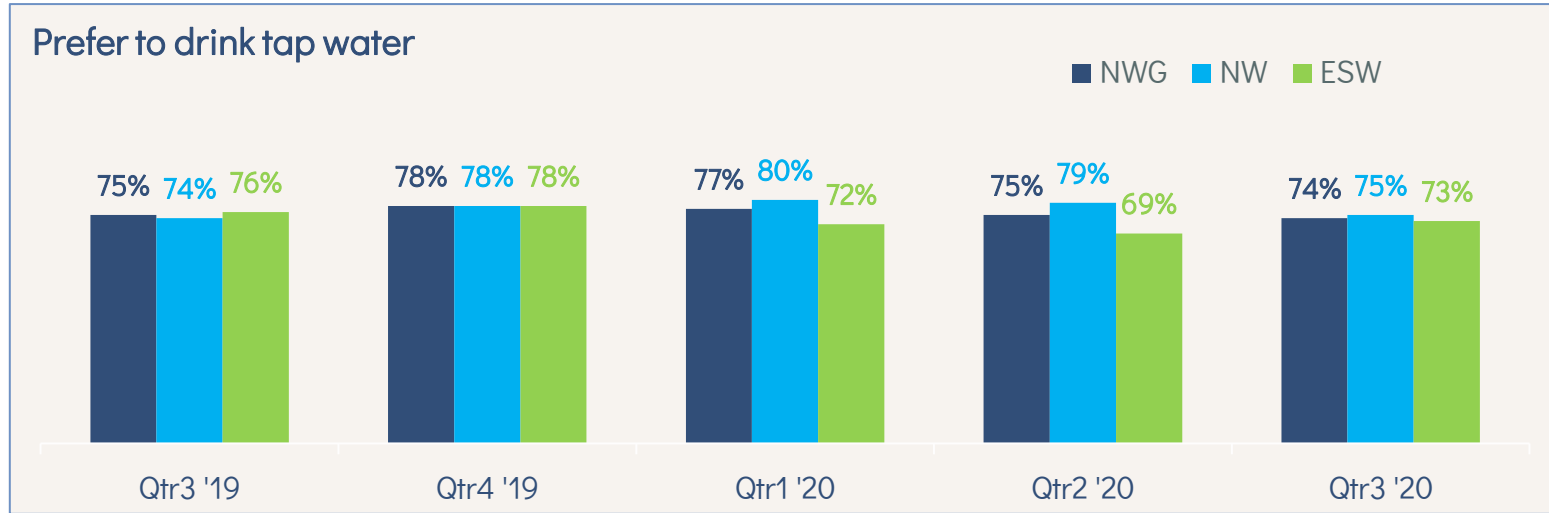
### All respondents - 500 customers

- Reliable supply (33%)
- Good quality/tasting water (21%)
- Good service overall/never need to contact them (12%)
- Never had a problem (10%)
- Good customer service (9%)
- Good communication (7%)
- Quick to respond (7%)
- Notify customers of works (7%)
- Timely/accurate/clear bills (5%)
- Helpful (5%)
- Quick to resolve problems/leaks (4%)
- Good/fair price (3%)
- Sewer/pipe maintenance (3%)
- Good water pressure (3%)
- Responsive to issues (3%)



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

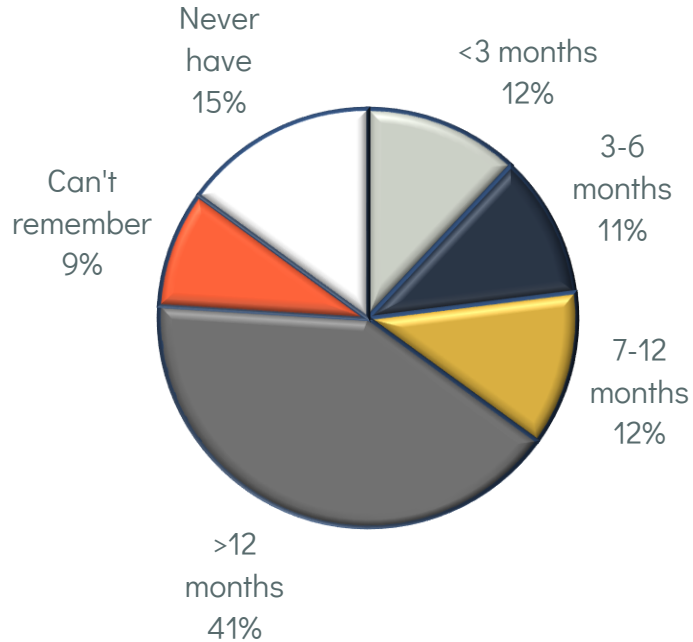
# Tap water preference



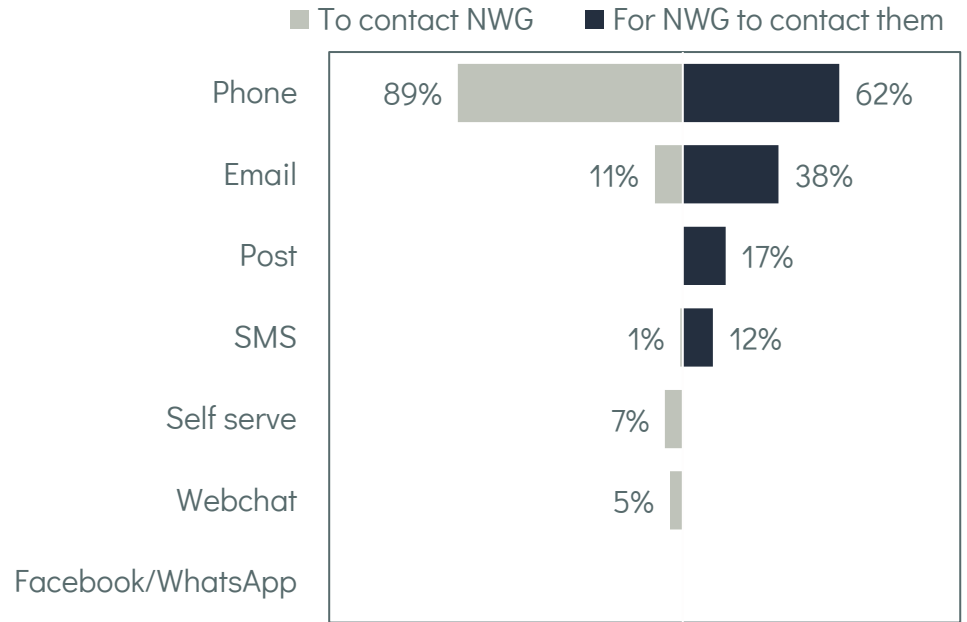


# Contact

## When last had contact with NWG

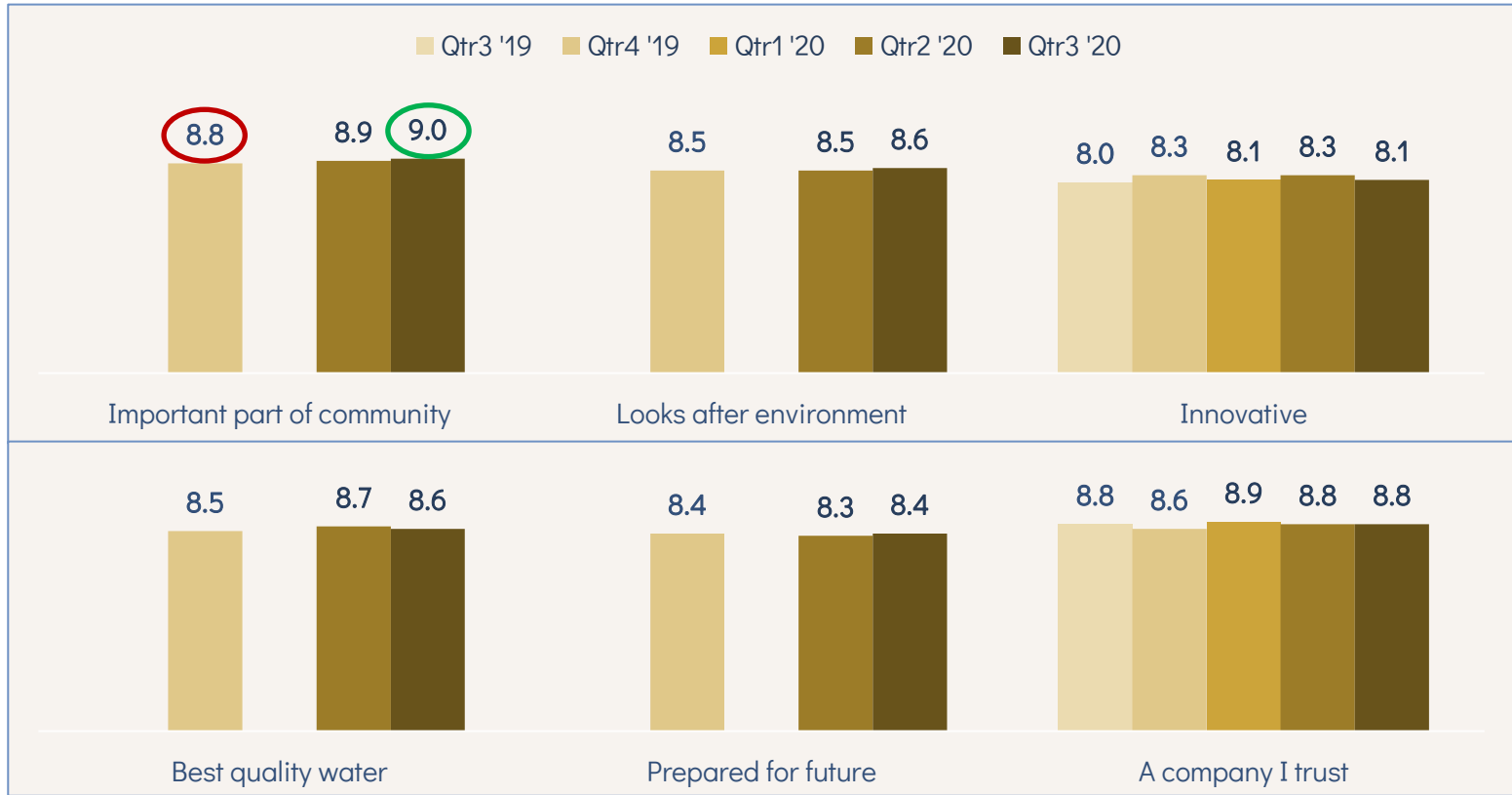


## Preferred contact methods





# Brand values (NWG)





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## Brand values (by region)

Important part of community	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW		8.9		9.1	9.0
ESW		8.6		8.7	9.0
Looks after environment	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW		8.6		8.7	8.6
ESW		8.3		8.3	8.5
Innovative	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	8.2	8.4	8.3	8.5	8.1
ESW	7.6	8.1	7.7	8.0	8.0
Best quality water	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW		8.6		8.9	8.7
ESW		8.4		8.4	8.5
Prepared for future	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW		8.5		8.4	8.4
ESW		8.3		8.1	8.3
A company I trust	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
NW	8.9	8.6	9.0	9.0	8.8
ESW	8.6	8.7	8.6	8.6	8.9

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## Comments relating to trust score

### All respondents - 500 customers

- Never had any problems – 30%
- No reason not to trust them – 16%
- Reliable water supply – 13%
- Good quality water – 11%
- Good customer service – 10%
- Good reputation/don't hear anything bad – 8%
- Quick response to issues – 7%
- Good communication – 6%
- Reliable – 6%
- Been with them a long time – 6%
- Deal with issues/problems – 6%
- Notify customers of works/problems – 5%
- Good billing system – 5%
- Helpful – 4%
- Open/honest/transparent – 4%

I think I would feel confident to get in touch and things and that it would be sorted pretty quickly if there was a problem. They have a good reputation, I've never heard anything bad

I just feel as if, when you've needed to contact them, what they say you can take their word for, they don't seem to go back on their word and you can trust it

Because I would imagine the company is aware of saving the planet I suppose and probably improving the service, making it as green as possible

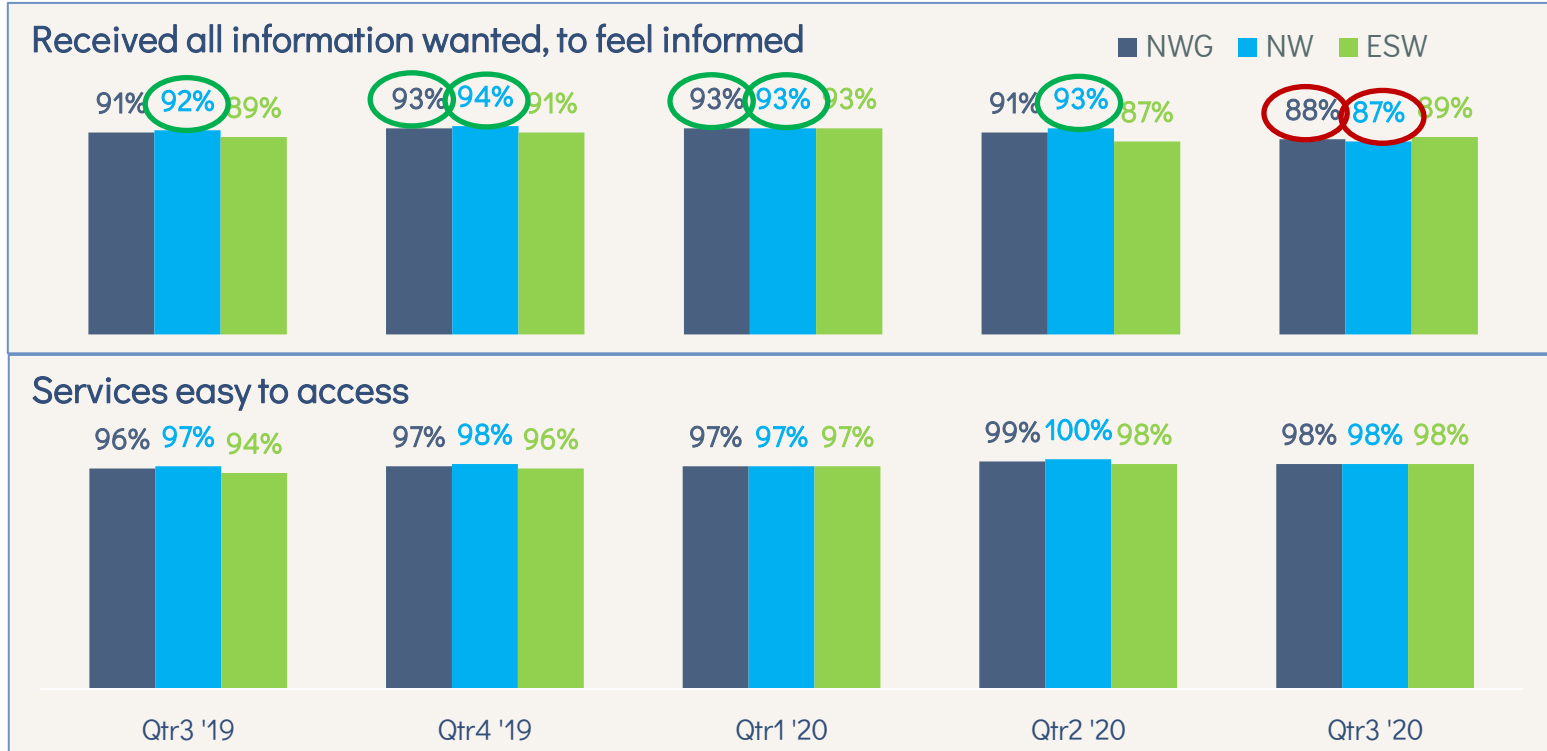
I actually genuinely trust them because they gave me the time to sit down and help manage my payments back. I'm up to date now but they took the time to sit down and help me rather than tell me. There was no attitude from them or patronising like you get these days, they genuinely wanted to help

Because I don't know them, I know they supply water but that's it. It's not that I don't trust them, it's just to trust them as a company you need to know a bit about them and I don't know them



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

# Information and service access



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

Because of the current Covid situation I find it hard to get access to information

To try and get hold of anyone is impossible. When you speak to someone they are miles and miles away and don't understand

Because like I say you have to be on the phone over half an hour before you get through. I've waited 30-45 minutes and had to give up and come off the phone

Would not accept my changes - tried to do it online but it kept rejecting it. Got a letter a year later but it was too late then

Don't know what the services are that are available

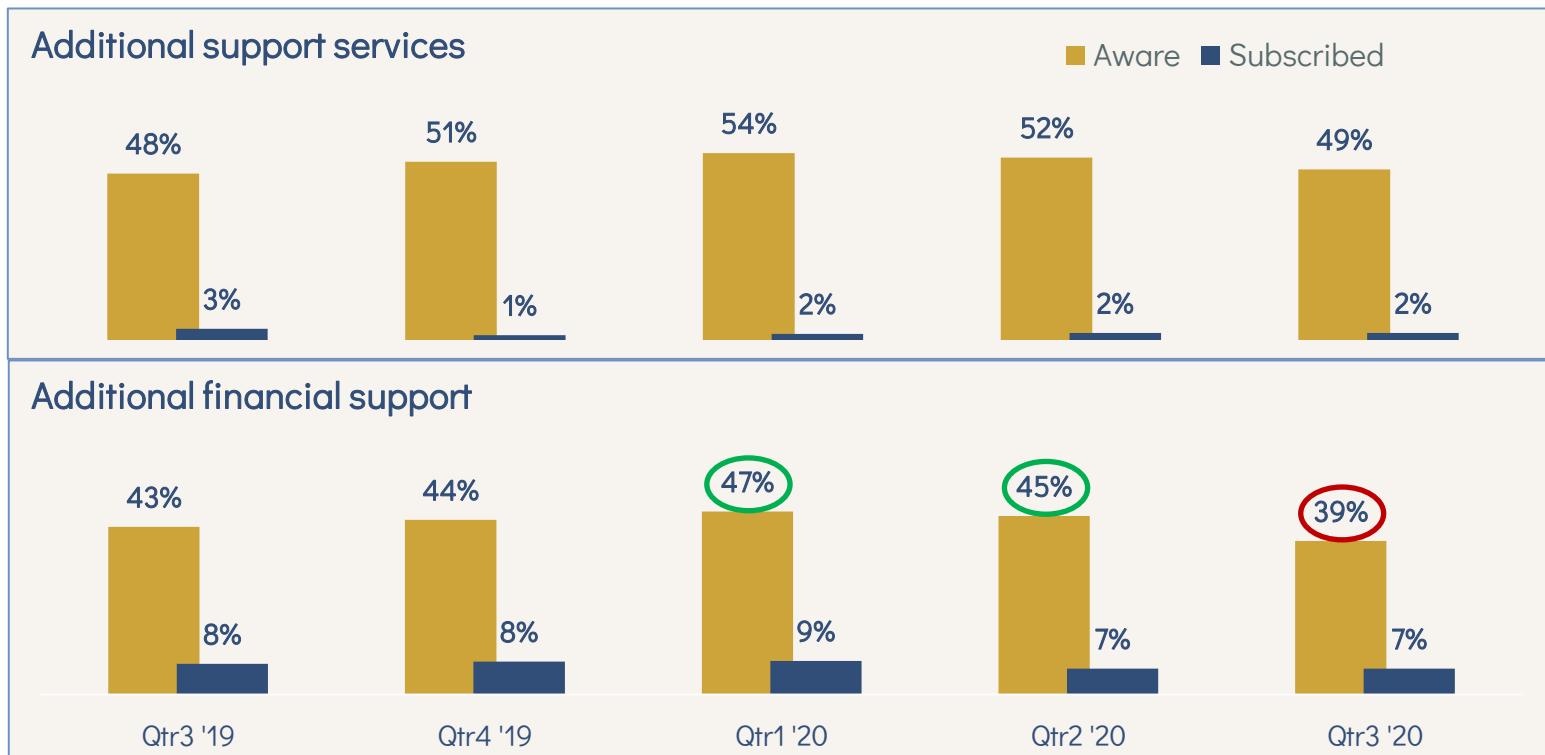
I don't know how to get hold of them other than the yearly bill and we don't get any information from them

There was a man in the street reading meters and we asked if he would read ours and he said he would only read meters on the street and would not come into our property and this was before lockdown

Just because I don't know what the services are they provide

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## Priority services (NWG)



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## Priority services (by region)

NW	Additional support services		Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
	Aware		50%	55%	56%	53%	47%
	Subscribed		3%	1%	1%	2%	1%
	Additional financial support		Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
	Aware		40%	46%	51%	45%	38%
	Subscribed		7%	9%	10%	6%	8%

ESW	Additional support services		Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
	Aware		45%	46%	51%	52%	52%
	Subscribed		4%	3%	3%	2%	3%
	Additional financial support		Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20
	Aware		46%	43%	39%	47%	40%
	Subscribed		9%	7%	7%	8%	6%

## HEADLINES

NPS this quarter – 47.0  
Overall satisfaction 8.8  
and satisfaction with  
value for money 8.4  
(both of these  
significantly better than  
this time last year)  
Trust this quarter – 8.8

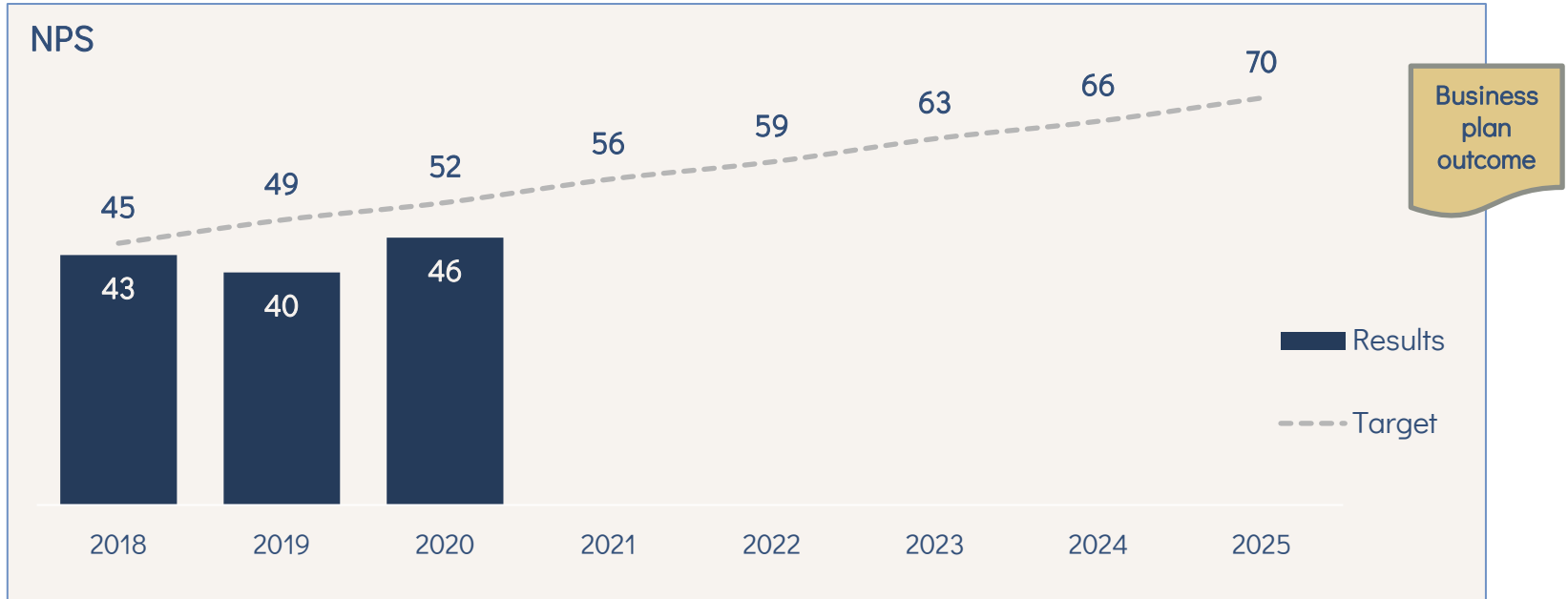
Overall, reliable supply is  
scored higher this  
quarter than at the start  
of the year, and being  
seen as an important part  
of the community vs the  
end of 2019. Awareness  
of additional financial  
support and having  
received all information  
wanted, though, have  
dropped this quarter

Scores have dropped in  
NW compared to earlier  
in the last year, on tastes  
and smells good,  
sufficient pressure,  
effective sewerage  
service, innovative and  
trust – but river water is  
better

Clean and clear  
drinking water and  
reliable supply have  
improved in ESW  
since last quarter

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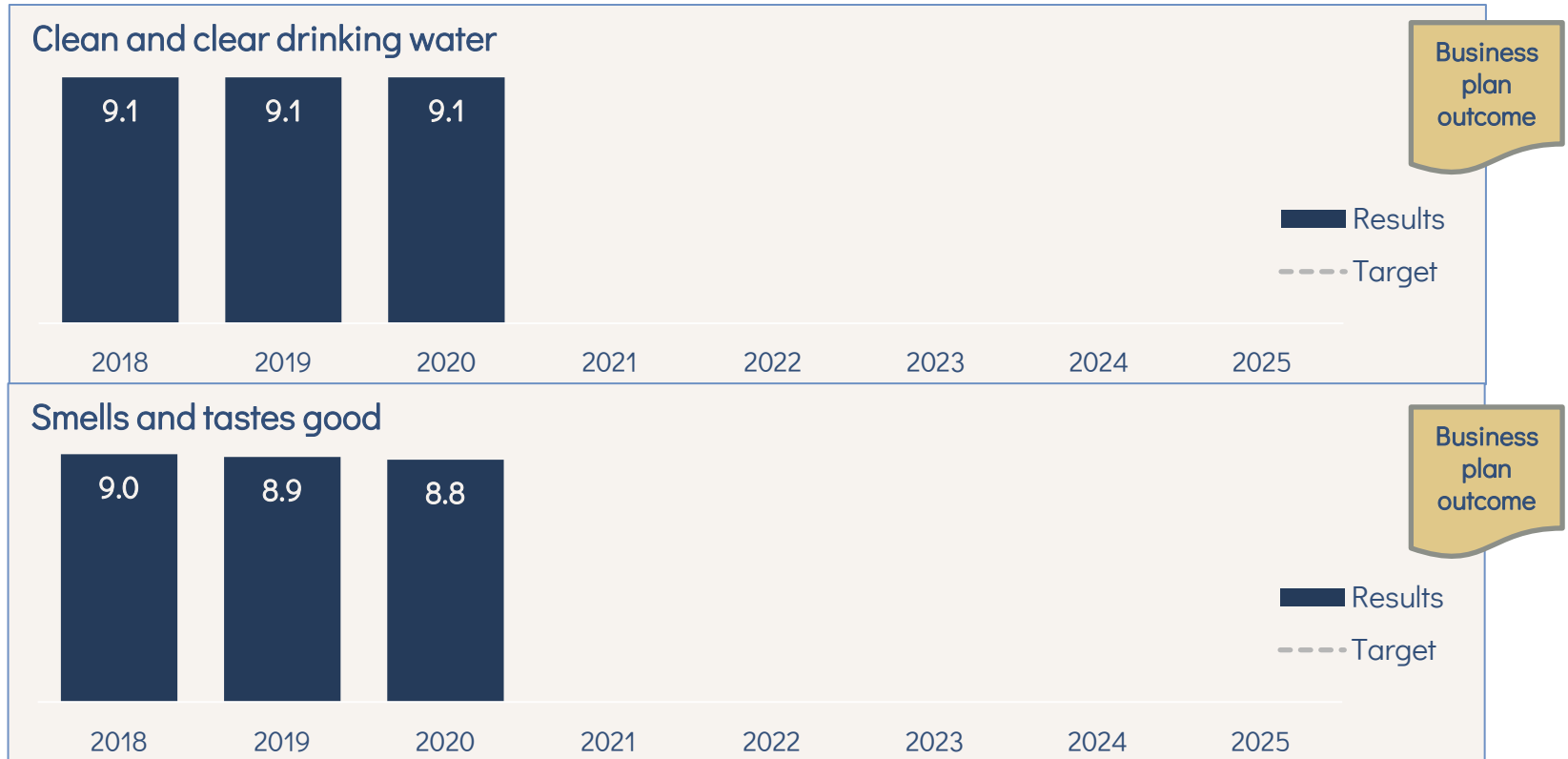
## Progress towards targets, 1 (2020 result is YTD)





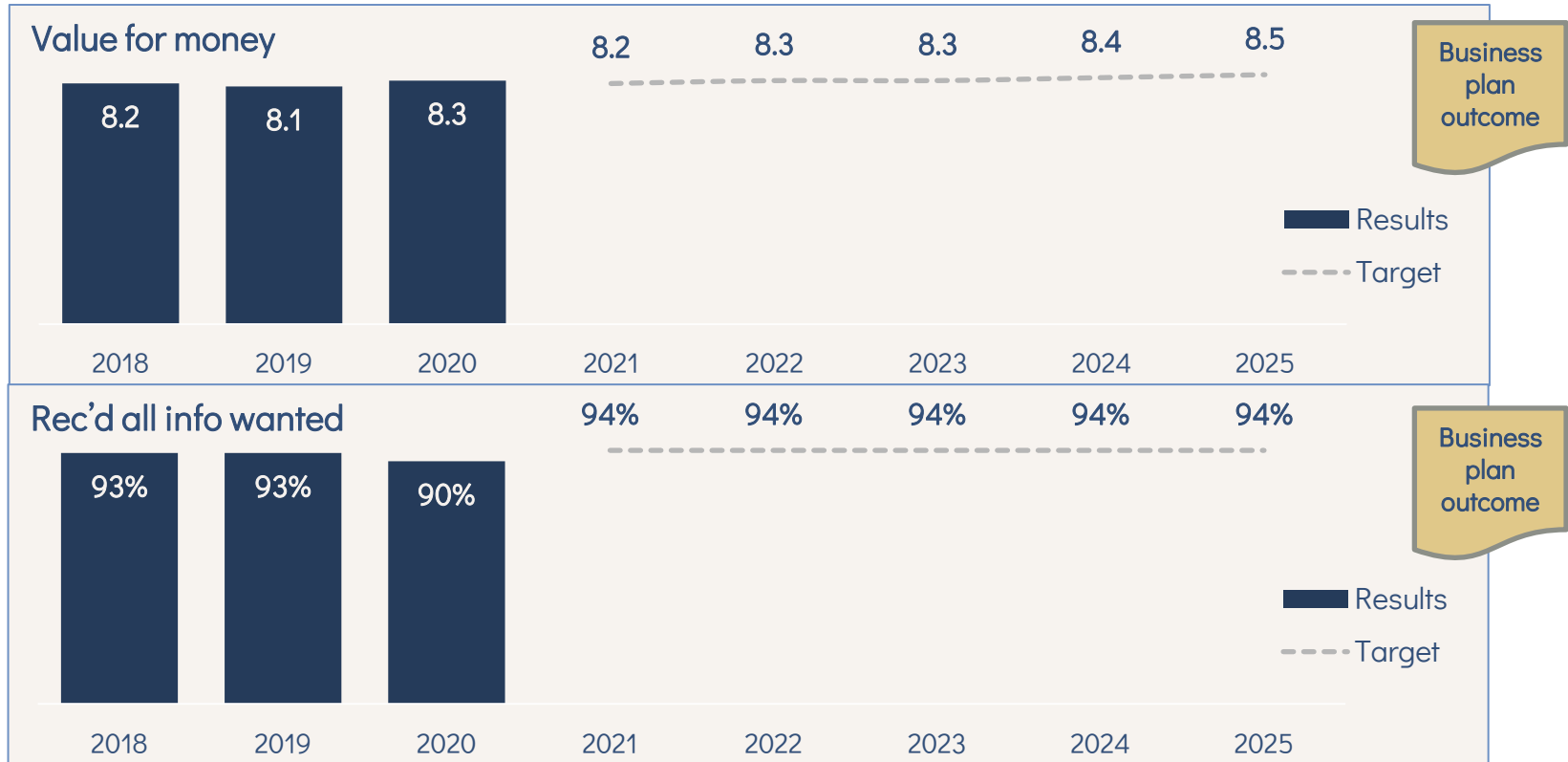
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## Progress towards targets, 2 (2020 result is YTD)



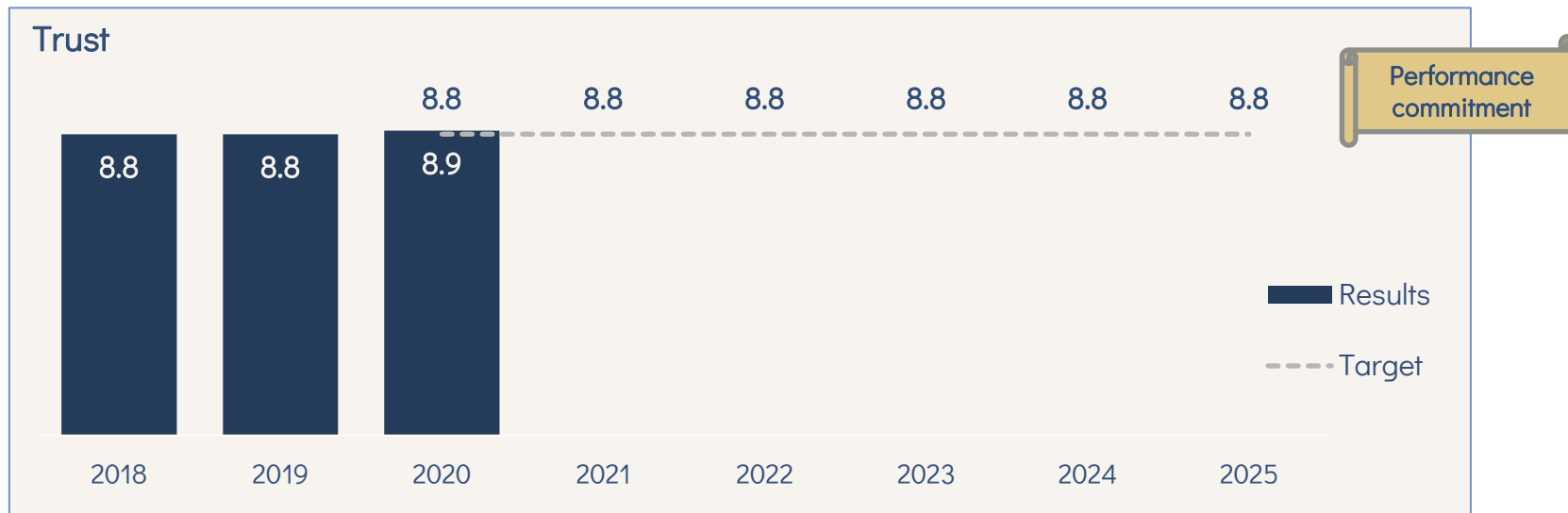


# Progress towards targets, 3 (2020 result is YTD)



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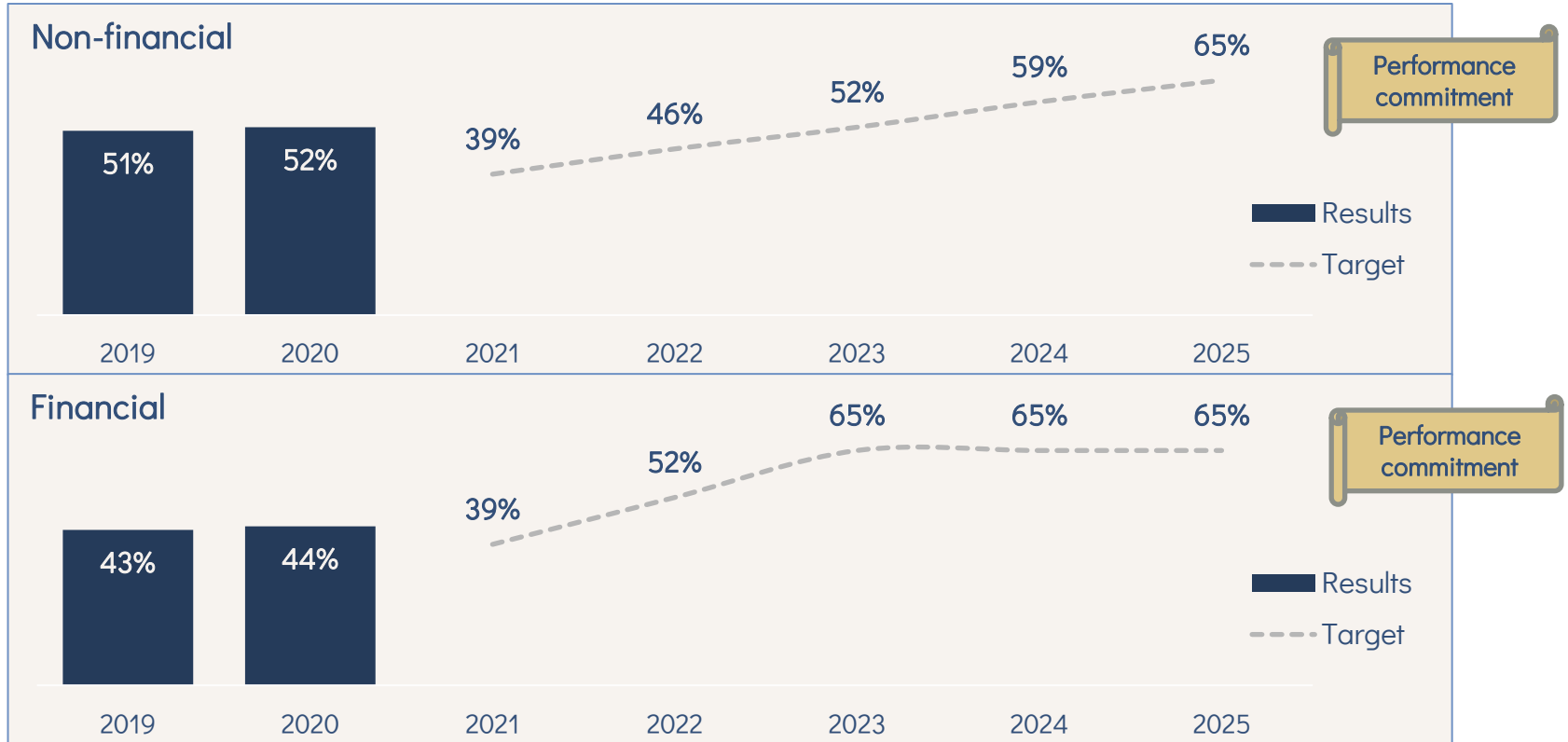
## Progress towards targets, 4 (2020 result is YTD)



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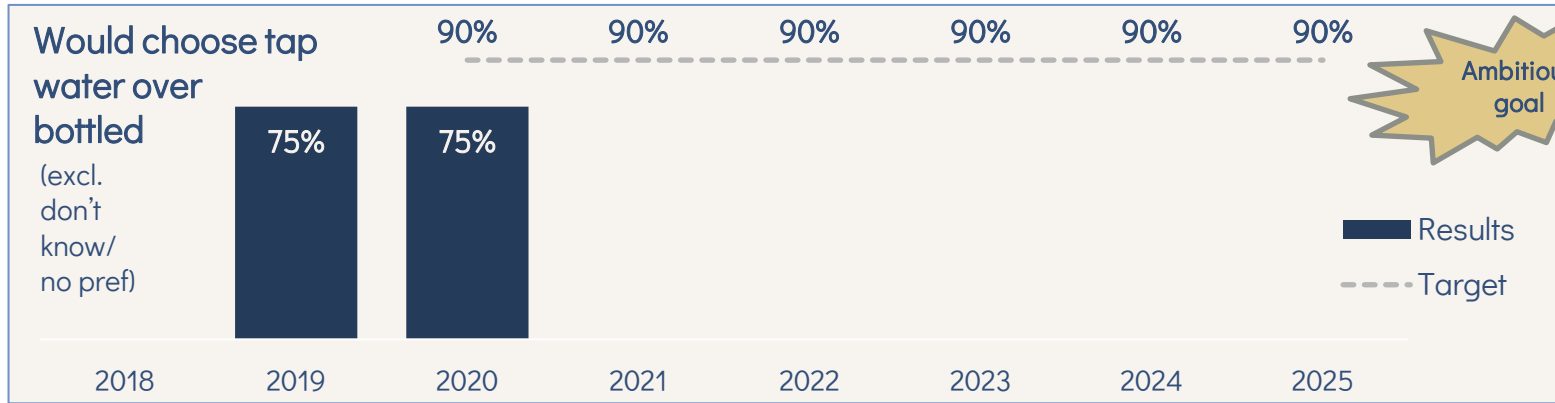
# Progress towards targets, 5 (2020 result is YTD)

Awareness of additional support





# Progress towards targets, 6 (2020 result is YTD)





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THANK YOU

**NWG**  
*living water*

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

