

Q3'22 Domestic Tracker

NWG

26/08/22

TRINITY
MCQUEEN

NWG
living water

Contents

What covered in
this report

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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: 11th July – 18th August 2022

Average interview length: 16.4 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
- Contact and preferences for contact channels
- Trust and other brand values measures
- Awareness and usage of support services

NPS



NWG
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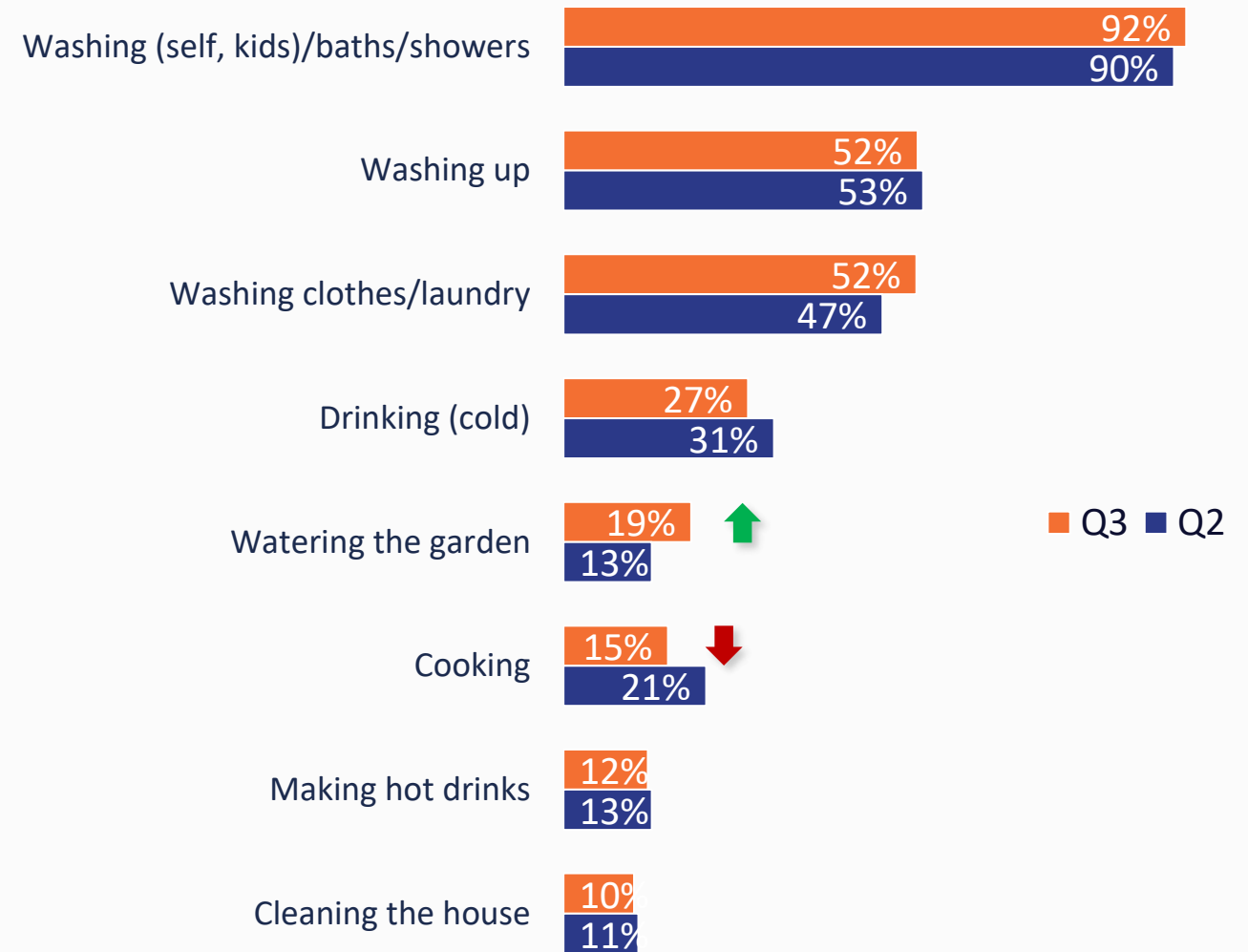
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The most common water usage at home is for bathing

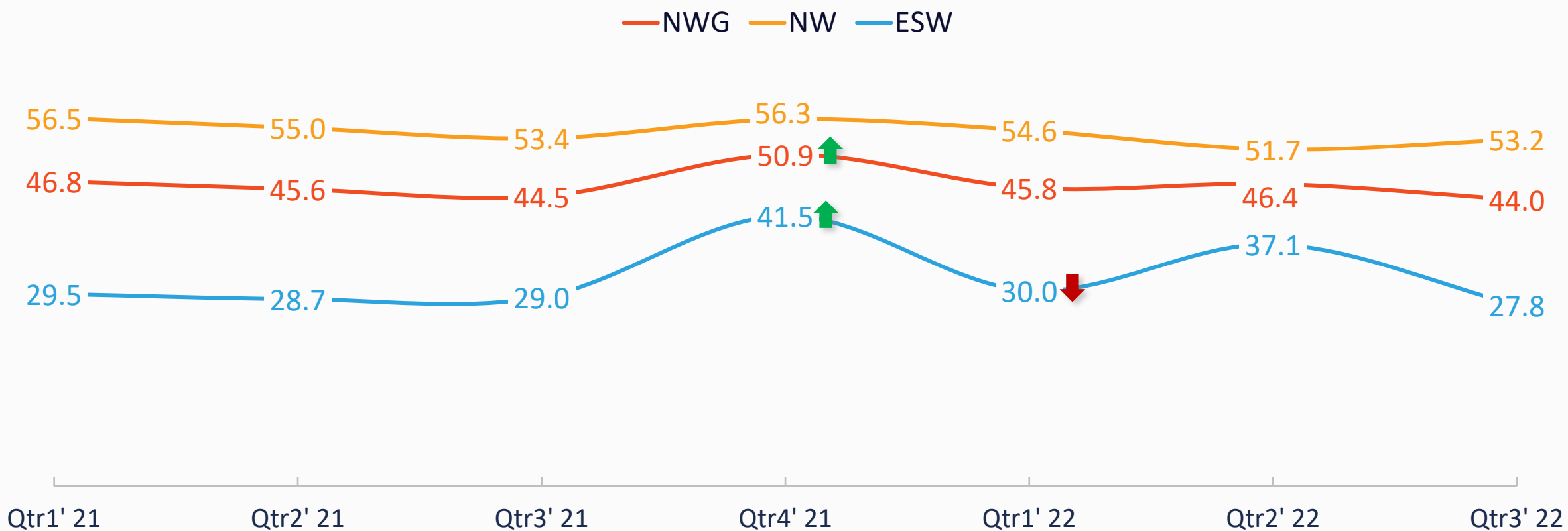
Water uses at home – top 8 %

↑ 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) - 265 customers

No problems	60%
Good experience/happy with them	11%
No supply problems	11%
Good service/customer service	11%
Informed/alerted of any issues/works etc	7%
Quick response/resolution	7%
Been with them for years	5%
Good water quality	5%
Helpful	5%
Good/fair price/good value	5%
Handled well/always deal with issues	5%
Good company/good in general/do a good job	4%
Resolve problems	4%
Good billing system - timely/accurate etc	3%
Nothing to compare against/no choice/no real dealings	9%

Passives (scores of 7-8) – 141 customers

No problems	44%
Good company/good in general/do a good job	12%
No supply problems	9%
Quick response/resolution	7%
Good service/customer service	6%
Good experience/happy with them	6%
Informed/alerted of any issues/works etc	6%
Never give a 10/always room for improvement	4%
Good water quality	4%
Been with them for years	4%
Lots of leaks/not maintaining pipes/sewers etc	4%
No reason not to	4%
Other	4%
Ok/fine/satisfied	3%
Nothing to compare against/no choice/no real dealings	16%

Detractors (scores of 0-6) – 60 customers

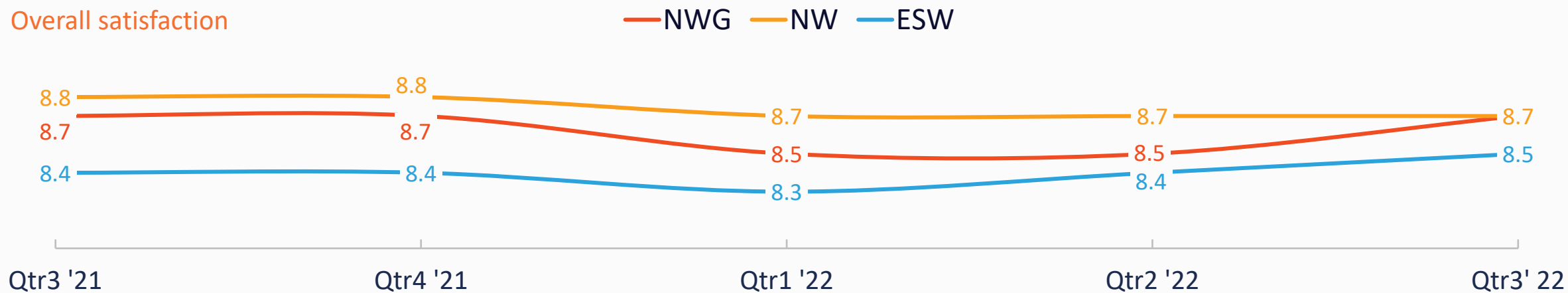
Neutral/indifferent	15%
Expensive	13%
No problems	13%
Don't recommend anything to anyone/no one to recommend to	8%
Lots of leaks/not maintaining pipes/sewers etc	8%
Other	7%
Poor water quality	5%
Never give a 10/always room for improvement	5%
Slow to respond to issues etc	5%
Poor experience with them	3%
Ok/fine/satisfied	3%
Only interested in profit	3%
Good service/customer service	3%
Prefer one bill for both services	3%
Nothing to compare against/no choice/no real dealings	38%

Overall Satisfaction

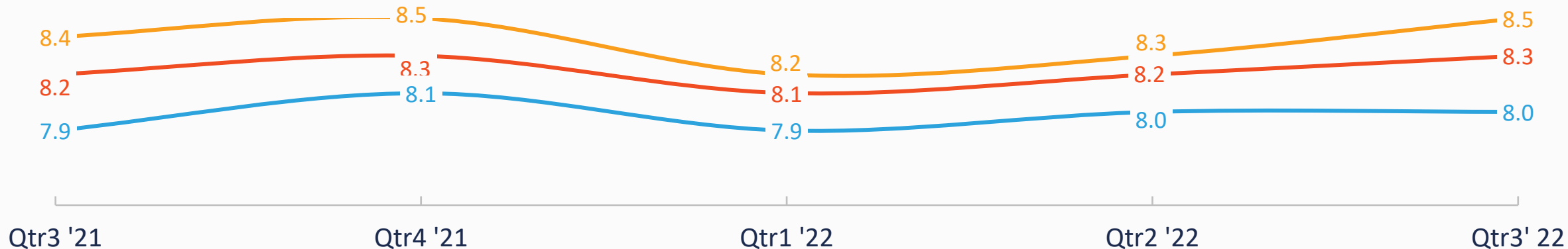


Satisfaction – overall & value for money

Overall satisfaction



Value for money satisfaction

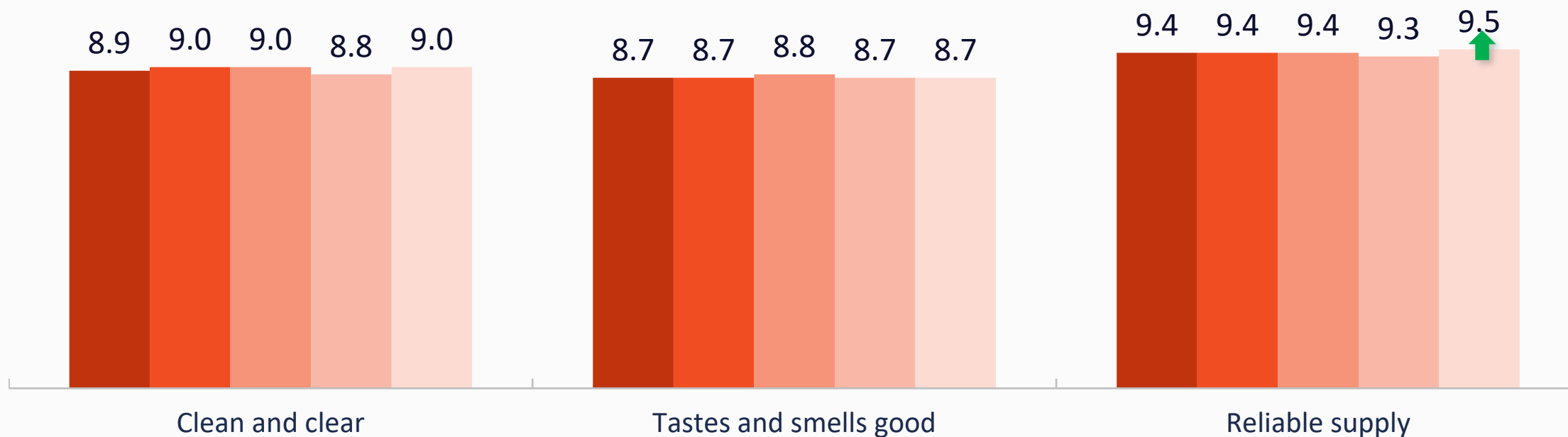


Q2 How satisfied would you say you are with [Northumbrian Water/Essex & Suffolk Water], in terms of value for money for the service they provide? Please give me a score from 0-10, this time where 0 means very dissatisfied and 10 means very satisfied. Q3 And on the same scale, how satisfied are you overall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

Service satisfaction (1)

NWG

■ Qtr 3 '21
 ■ Qtr 4 '21
 ■ Qtr 1 '212
 ■ Qtr 2 '22
 ■ Qtr 3 '22



NW 9.1 9.2 9.1 9.0 9.2 

8.8 8.8 8.8 8.8 8.9

9.4 9.5 9.4 9.4 9.5

ESW 8.7 8.8 8.9 8.5  8.6

8.4 8.4 8.7 8.4 8.4

9.3 9.3 9.4 9.2 9.4 

Service satisfaction (2)

NWG

■ Qtr3 '21
 ■ Qtr4 '21
 ■ Qtr1 '22
 ■ Qtr2 '22
 ■ Qtr3 '22

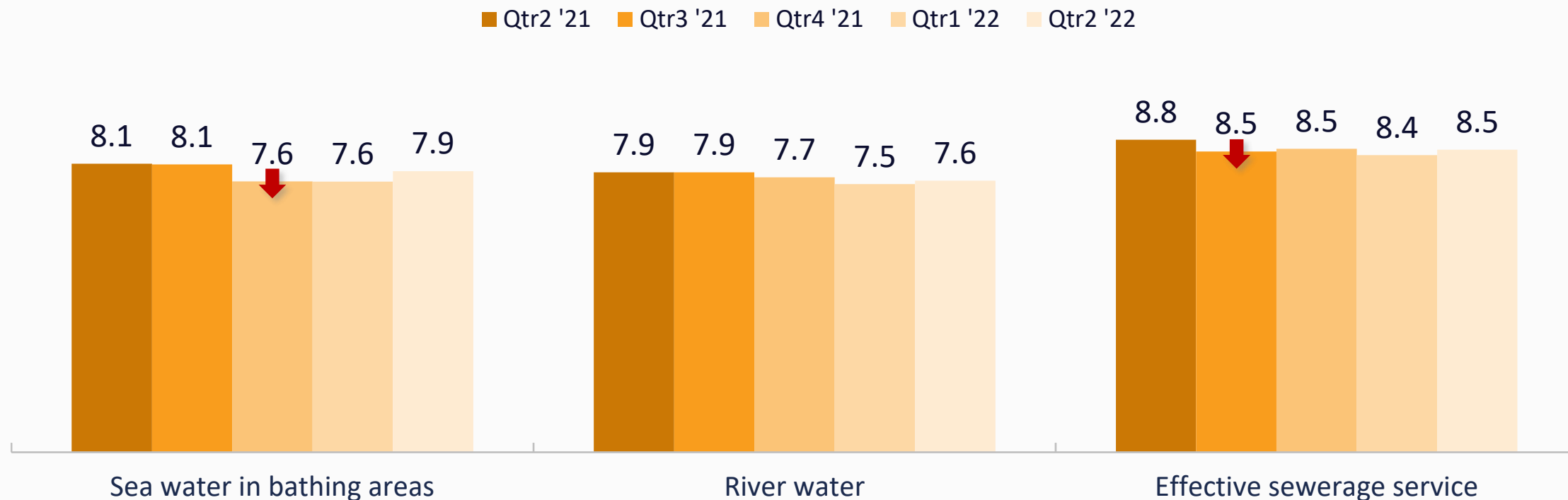


NW	8.9	8.9	8.8	8.9	9.0	8.9	8.7	8.8	8.8	9.0	8.6	8.5	8.5	8.5	8.6
ESW	8.6	8.4	8.4	8.6	8.5	8.7	8.7	8.2	8.4	8.7	8.2	8.3	8.2	8.2	8.4

Q4 I am now going to read out a number of aspects of [Northumbrian Water/Essex & Suffolk Water]'s service, and I'd like you to tell me how satisfied you are, with each. Please use our scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied. Base NWG (500), NW (316), ESW (184)

Service satisfaction (NW only)

NW region only



Improvements to services

Overall improvements (top 15%)

Gave any low scores (0-6) – 178 customers	
Any improvements mentioned	83%
Improve quality/taste/smell of water	23%
Improve water pressure	17%
Cleaner rivers/sea	17%
Better ongoing sewer/pipes maintenance	11%
More detail/clarity on charges	10%
Cleaner beaches	9%
Nothing in particular/None needed	8%
Reduce prices	6%
More information on their services/what they do	4%
Replace old infrastructure/improve capacity	3%
More accurate bills/read meters more often	3%
Do more for the environment	3%
Other	6%
Don't know	8%

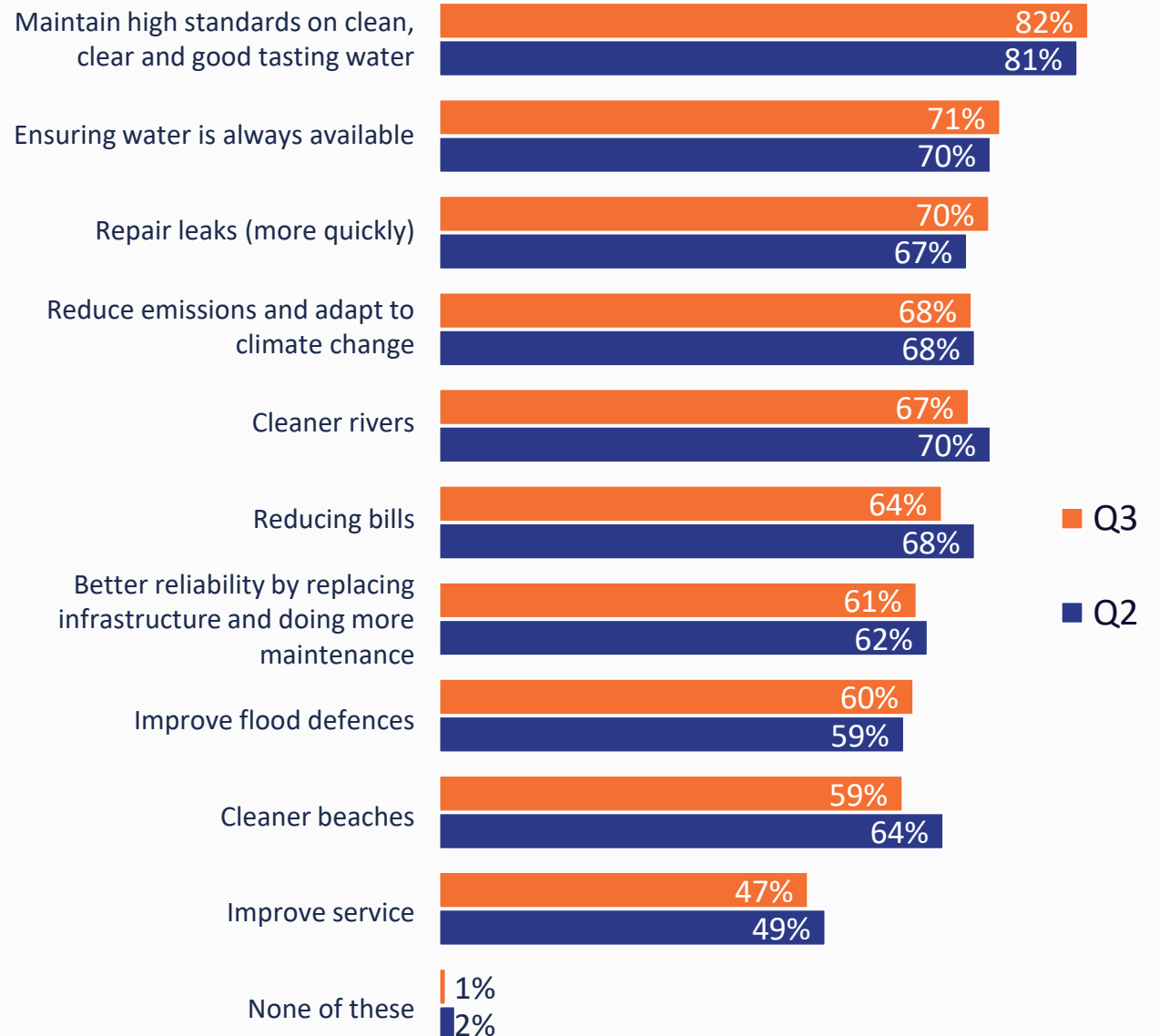


Areas of the business plan that respondents think should be a priority

(NWG)

NWG Total

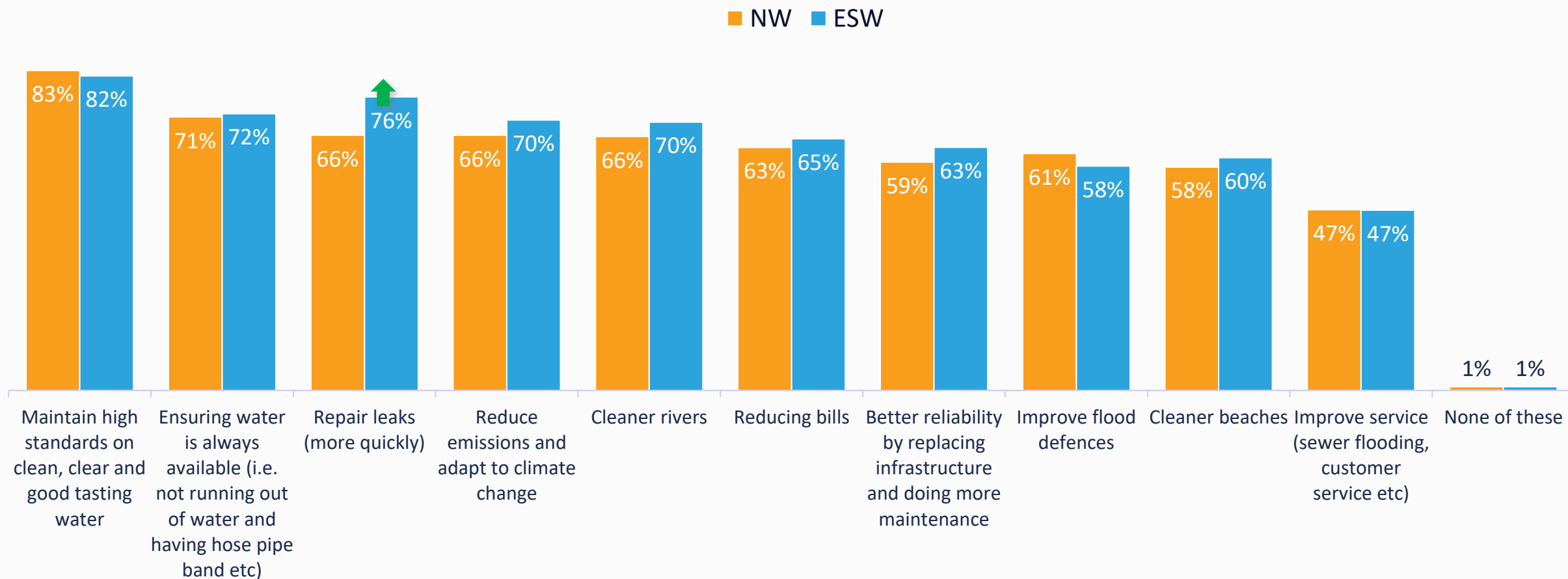
↑ ↓ Significantly higher/Lower than previous Qtr



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)



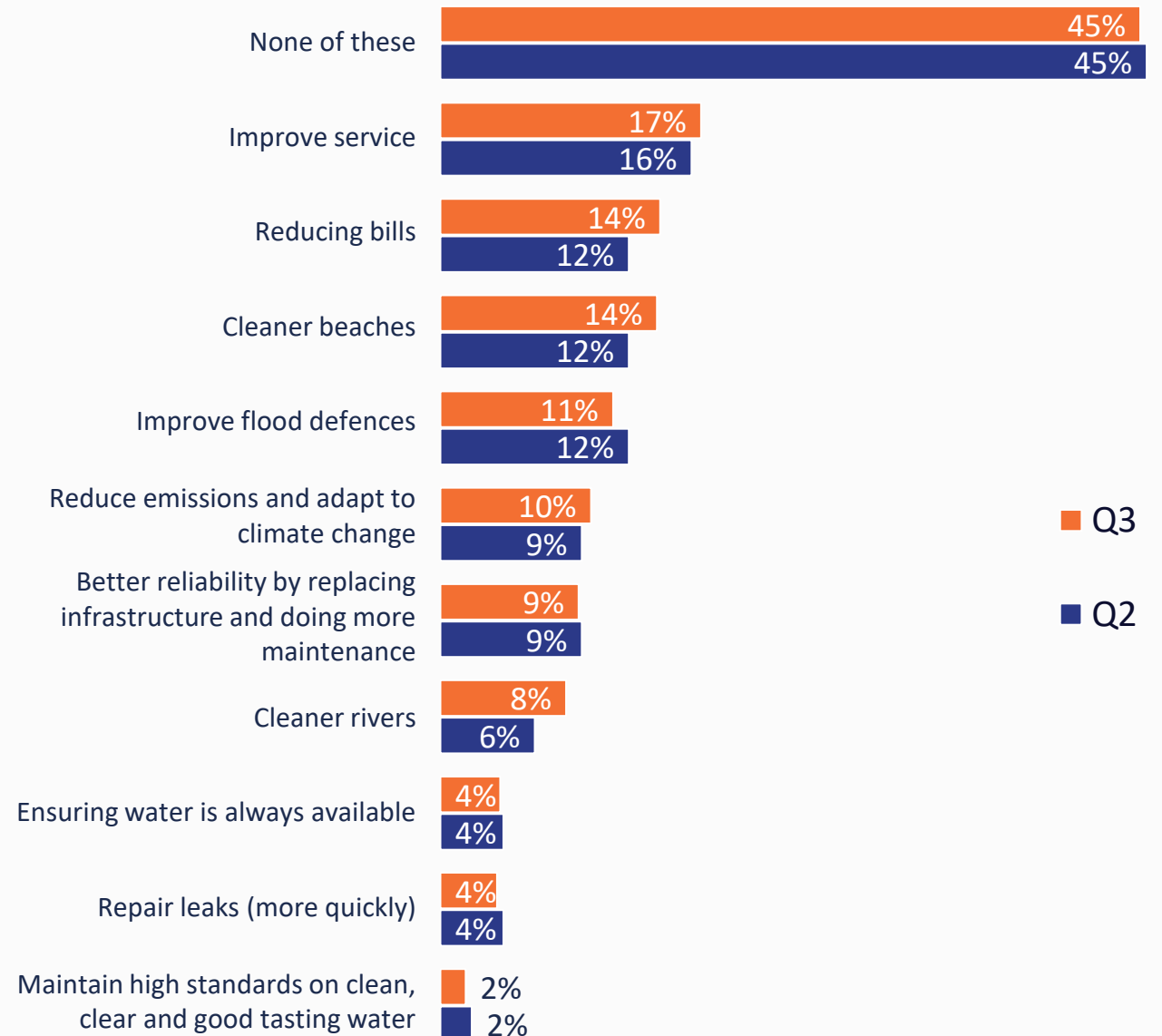


Areas of the business plan that respondents think are less important

(NWG)

NWG Total

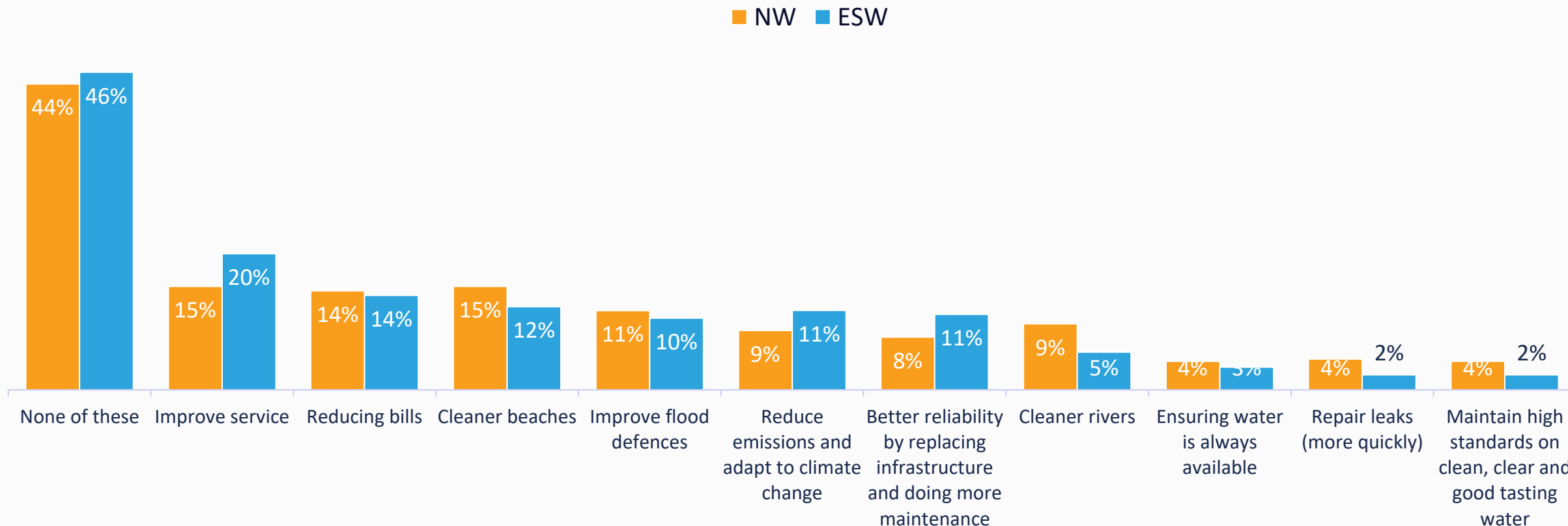
↑ ↓ Significantly higher/Lower than previous Qtr



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)

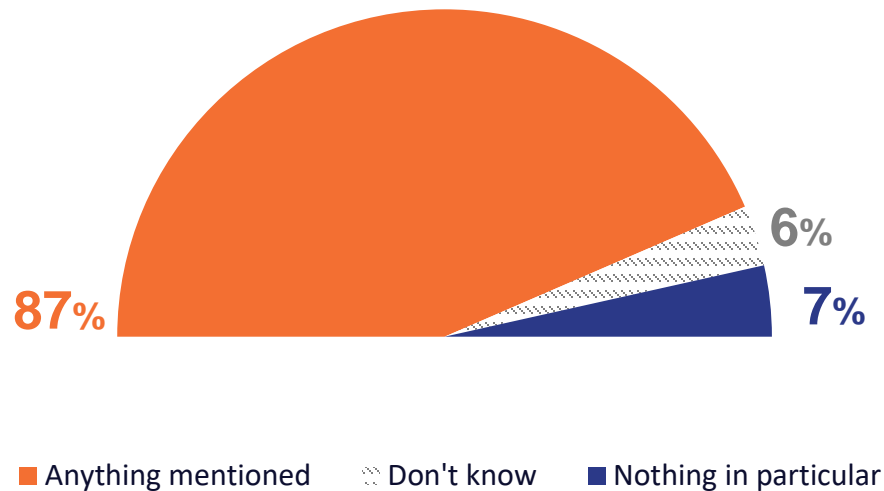
Company suggestions and preferences





What NWG does well

(NWG)

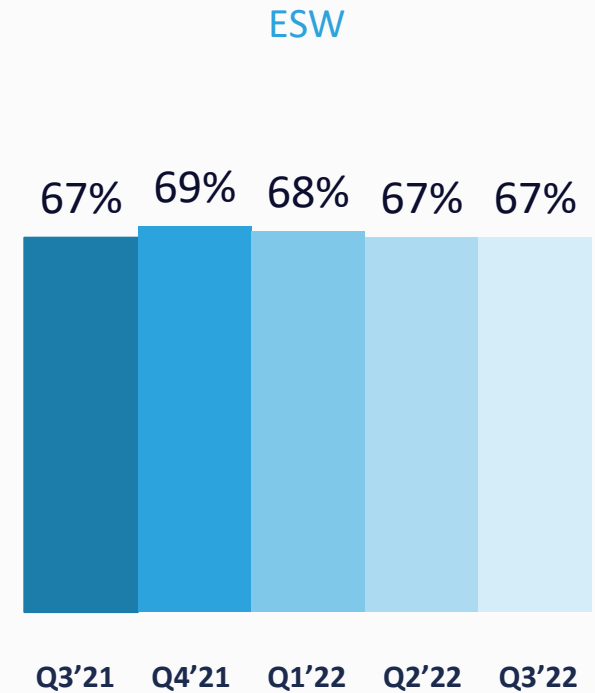
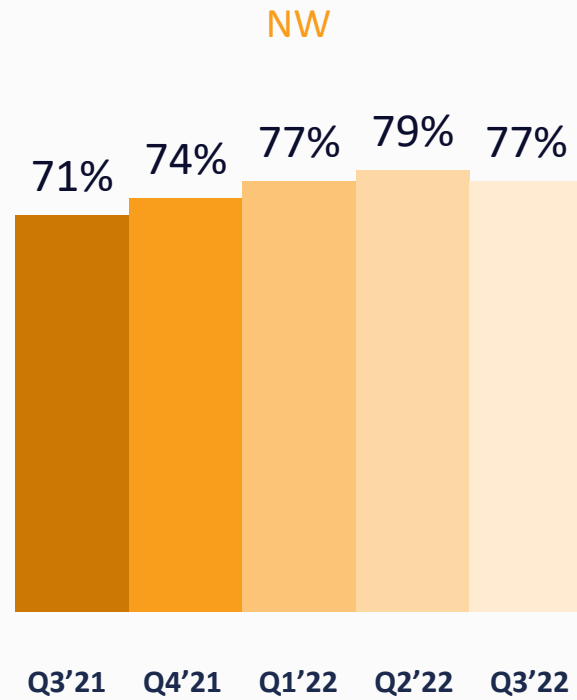
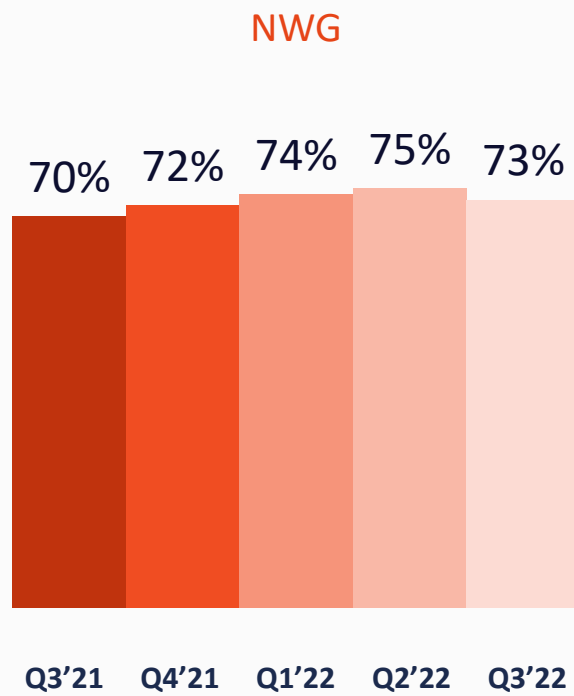


What NWG do particularly well – Top 15

Reliable supply of water	39%
Good quality water/tastes/smells good	21%
Never had any problem/never need to contact them	11%
Respond quickly to issues/problems/resolve issues	9%
Helpful/friendly/professional call centre staff	7%
Good service/customer service	7%
Notify customers if there are going to be works	6%
Good ongoing maintenance of sewers/pipes	5%
Repair leaks quickly	4%
Keep customers informed of progress on issues raised	4%
Good water pressure	3%
Provide good information on services/what the company does	2%
Other	2%
Timely/accurate bills	2%
Fair prices	2%

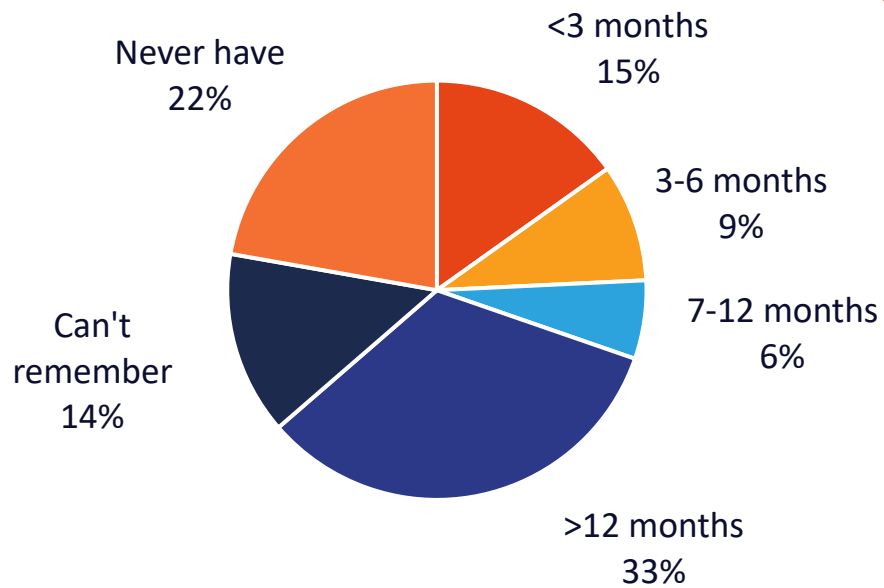
Tap water preference

% who prefer tap water over bottled water



Contact with NWG

When last had contact with NWG?

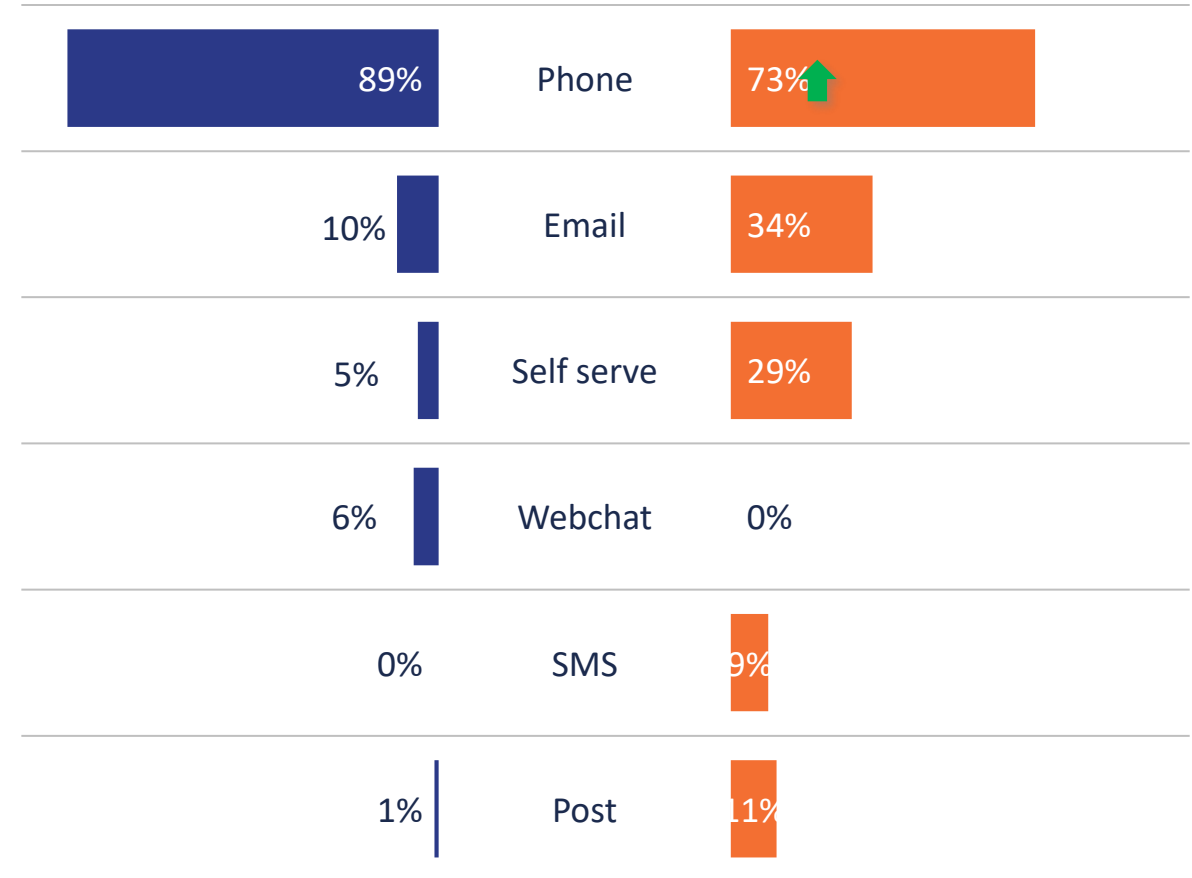


Preferred contact methods

↑ Significantly higher than previous Qtr
↓ Significantly lower than previous Qtr

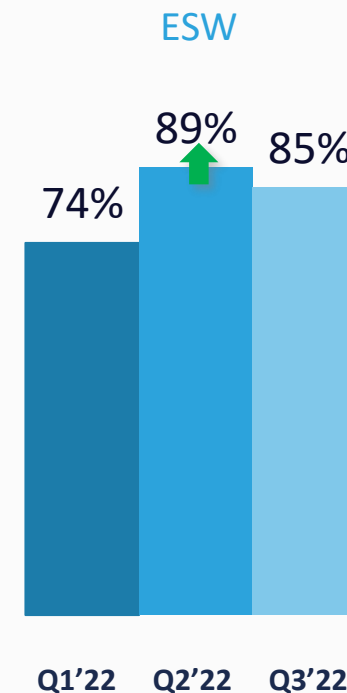
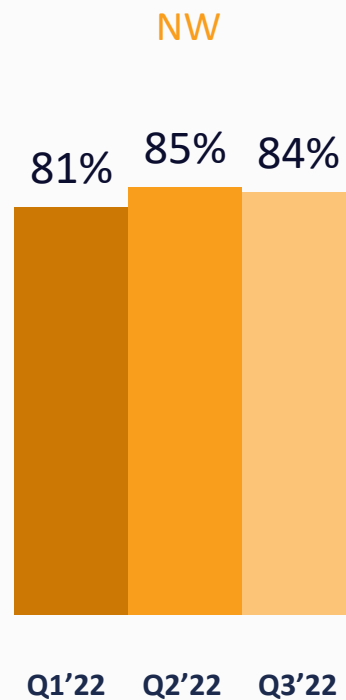
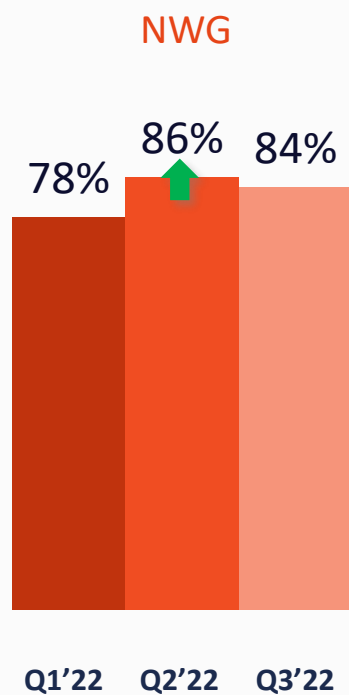
Preferred method to contact NWG

Preferred method to be contacted by NWG



Whether issue was resolved

% who say issue was resolved



Brand values



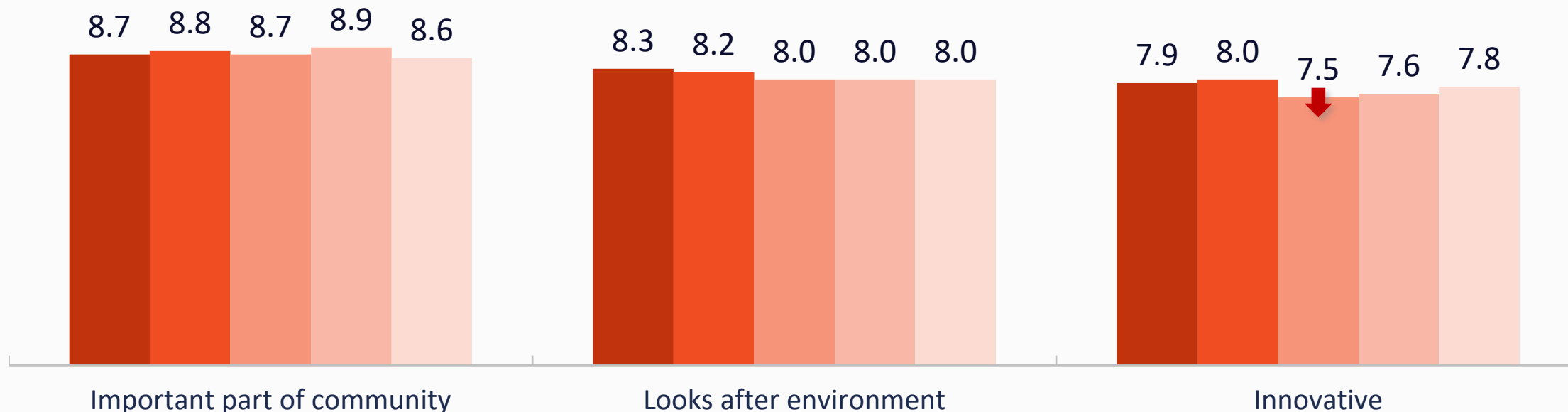
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Brand values (1)

Overall service satisfaction

■ Qtr 3 '21
 ■ Qtr 4 '21
 ■ Qtr 1 '212
 ■ Qtr 2 '22
 ■ Qtr 3 '22



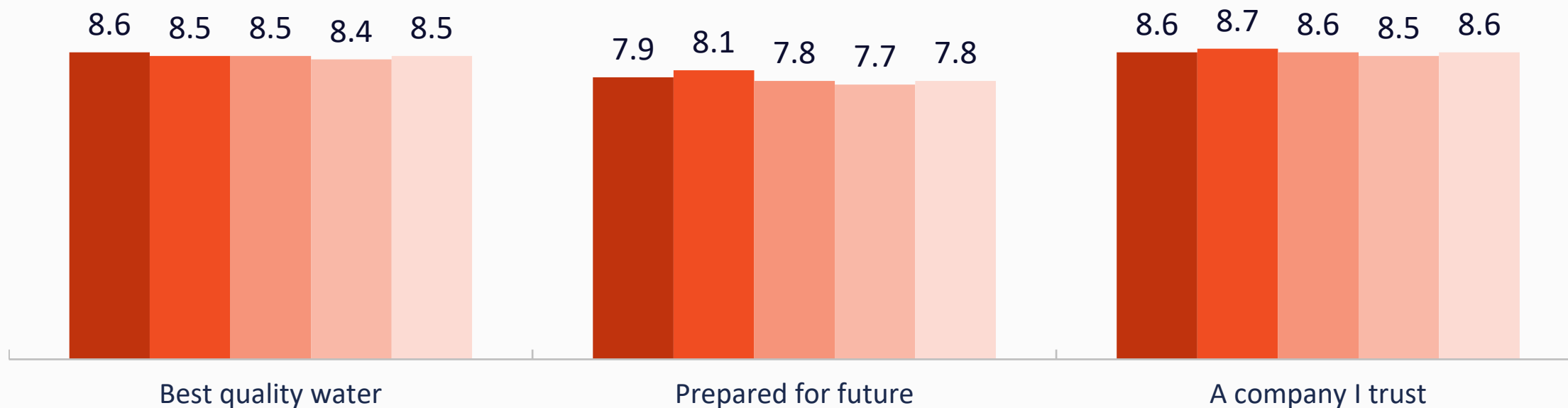
NW	8.8	9.0	8.8	8.8	8.7	8.5	8.3	8.2	8.0	8.2	8.1	7.9	7.7	7.7	8.0
ESW	8.5	8.6	8.5	8.5	8.3	7.8	8.1	7.6	7.9	7.7	7.6	8.0	7.3	7.6	7.4

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)

Brand values (2)

Overall service satisfaction

■ Qtr3 '21
 ■ Qtr4 '21
 ■ Qtr1 '22
 ■ Qtr2 '22
 ■ Qtr3 '22



NW	8.8	8.7	8.7	8.7	8.8	8.1	8.2	8.0	7.7	7.9	8.7	8.8	8.8	8.6	8.7
ESW	8.3	8.2	8.3	8.1	8.1	7.6	7.9	7.5	7.7	7.5	8.4	8.6	8.3	8.3	8.4

Q4 I am now going to read out a number of aspects of [Northumbrian Water/Essex & Suffolk Water]'s service, and I'd like you to tell me how satisfied you are, with each. Please use our scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied. Base NWG (500), NW (316), ESW (184)

Comments relating to Trust

Reasons why NWG are a company to trust

Never had any problems	28%
Reliable water supply	16%
No reason not to trust them/just trust them	14%
Good quality water supply	12%
Deal with issues/problems/solve queries	8%
Quick response/resolution to issues etc	8%
Good customer service/good service	7%
Never hear anything bad about them/good reputation	6%
Reliable/trustworthy	6%
Happy with them/do a good job	5%
Been with them a long time	5%
Notify customers of any works/issues/problems etc	4%
Others	4%
Do not know enough about them to comment/no real dealings/no reason/don't think about it	11%
Have no option/monopoly/not aware of anyone else	4%

Because I've not had no issues with them. They are a good company that supply good water- *Trust score 7-10*

They have consistently supplied clean water with no issues- *Trust score 7-10*

Very reliable and if there are any issues in the street they always let us know and deal with it straight away. Toilet used to fill up a lot and bill was sky high, they didn't charge us for it and sent us out the right thing for the toilet- *Trust score 7-10*

I don't trust any of the big companies, they don't care about the cost of living, only their record profits- *Trust Score 0-6*

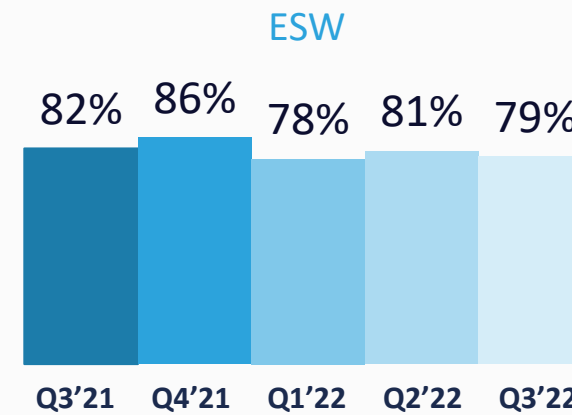
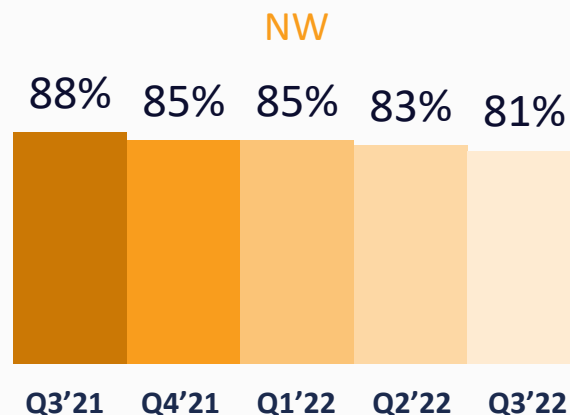
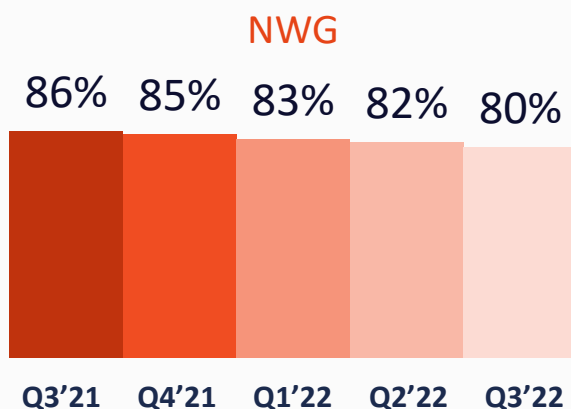
No real visibility from them, no presence in the community as to what they are doing- *Trust Score 0-6*

Information and services

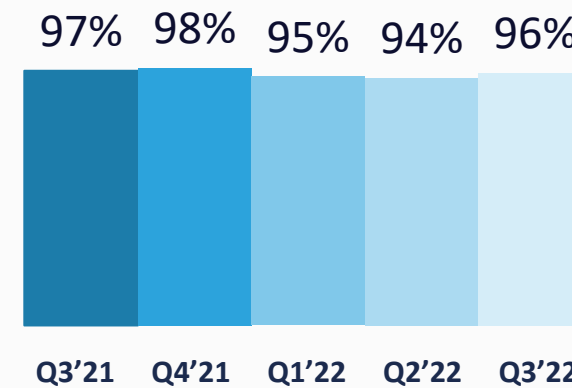
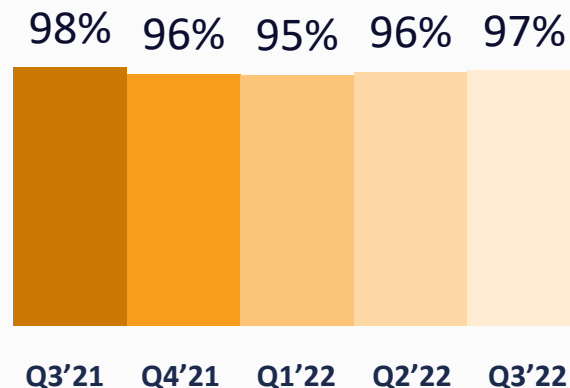
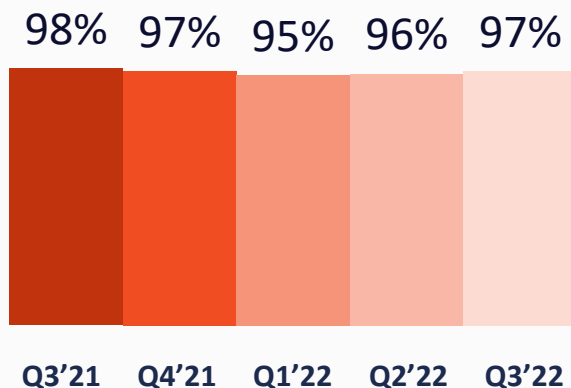


Information and services access


% Received all information wanted, to feel informed




% Services easy to access




14 customers think that services are NOT easy to use



It's just another one of the companies.
They have a phone number and then you
are on hold. Nobody is easy to get hold of.



I find it hard to get hold of them,
always in queues and get passed
department to department. Even
the app, what I've tried isn't easy
to navigate.



Because you can't get hold
of the people that you need
to.

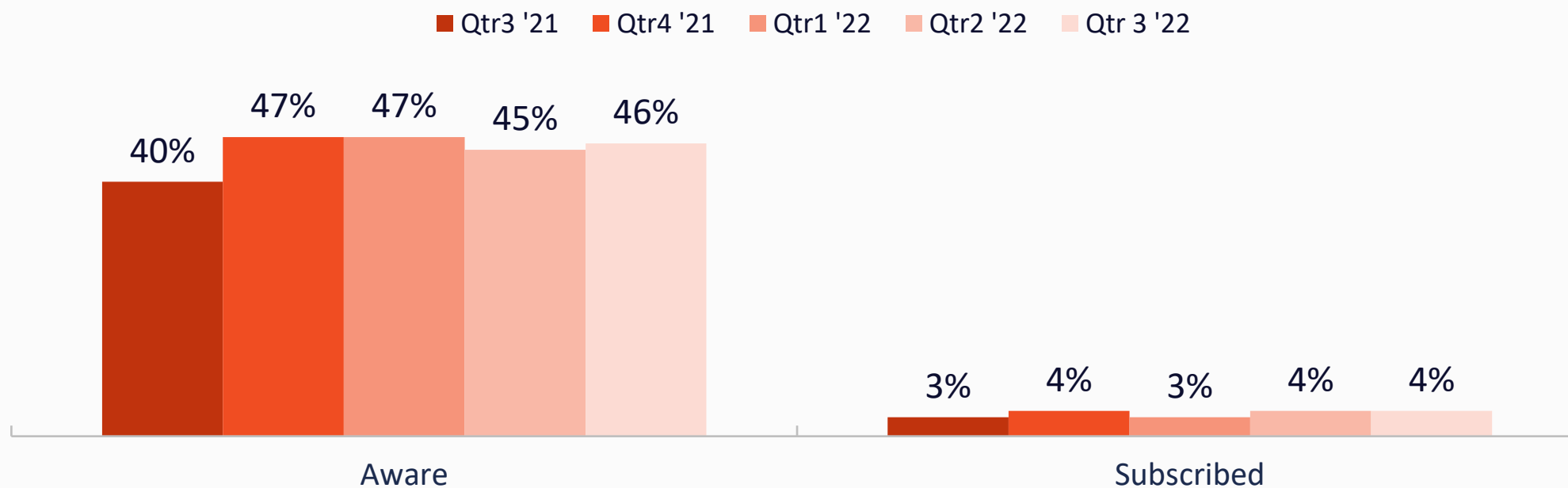
Very difficult to get hold of.

Priority services



Priority Services (1)

Awareness/usage of additional support services

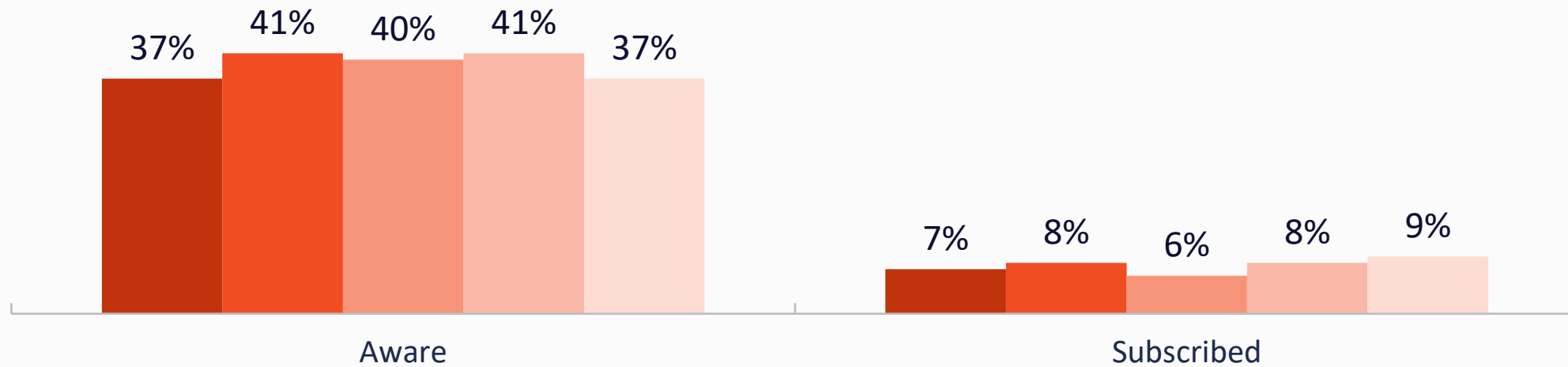


	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22	Qtr 3 '22	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22	Qtr 3 '22
NW	39%	47%	47%	43%	47%	4%	3%	2%	3%	3%
ESW	41%	47%	48%	49%	45%	1%	5%	4%	5%	4%

Priority services (2)

Awareness/usage of additional financial services

■ Qtr3 '21 ■ Qtr4 '21 ■ Qtr1 '22 ■ Qtr2 '22 ■ Qtr 3 '22



	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22	Qtr 3 '22	
NW	36%	41%	39%	39%	40%	
ESW	39%	42%	42%	45%	32%	↓
	7%	7%	6%	7%	11%	↑
	7%	10%	7%	11%	6%	

Key headlines



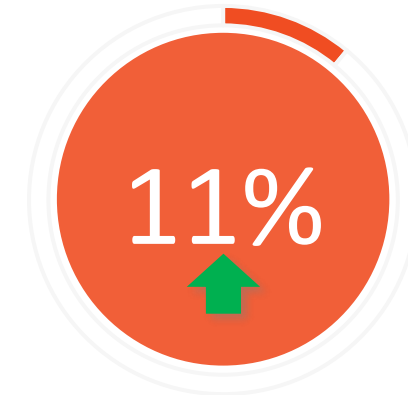
NPS this quarter

NWG NPS has remained consistent throughout 2022. However, NPS amongst ESW has seen a dip, reaching its lowest score to date (27.8)



Reliable water supply

NWG has seen a significant increase from Q2 in satisfaction for having 'reliable water supply', this has been driven by a significant increase in the ESW region (9.4)



Usage of additional financial services

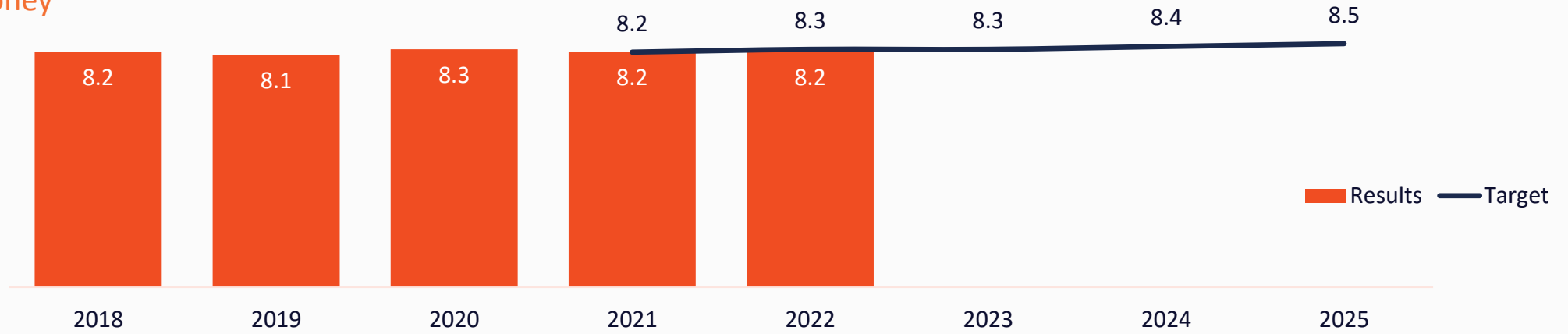
The proportion of NWG customers in the NW who have subscribed to additional financial services has increased significantly from Q2

Progress and targets

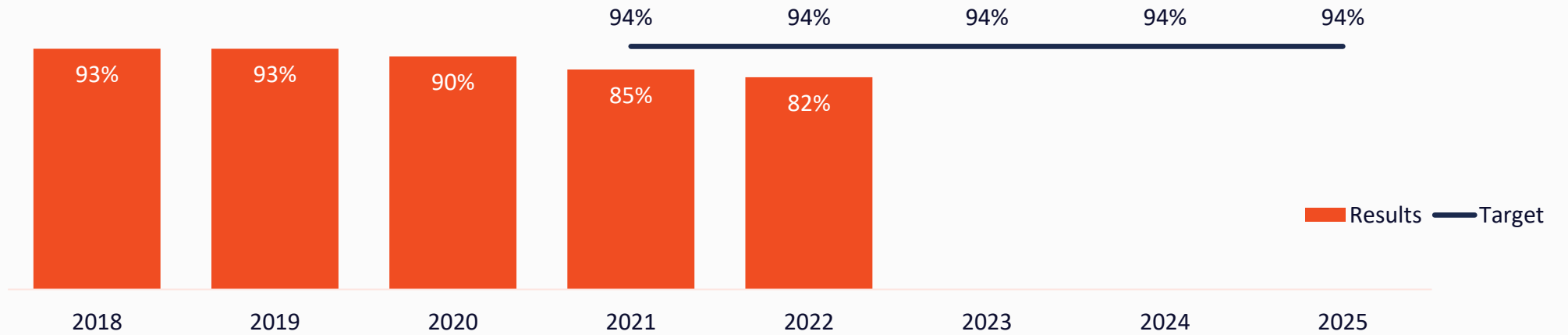


Progress towards targets – Business Plan Outcome

Value for money

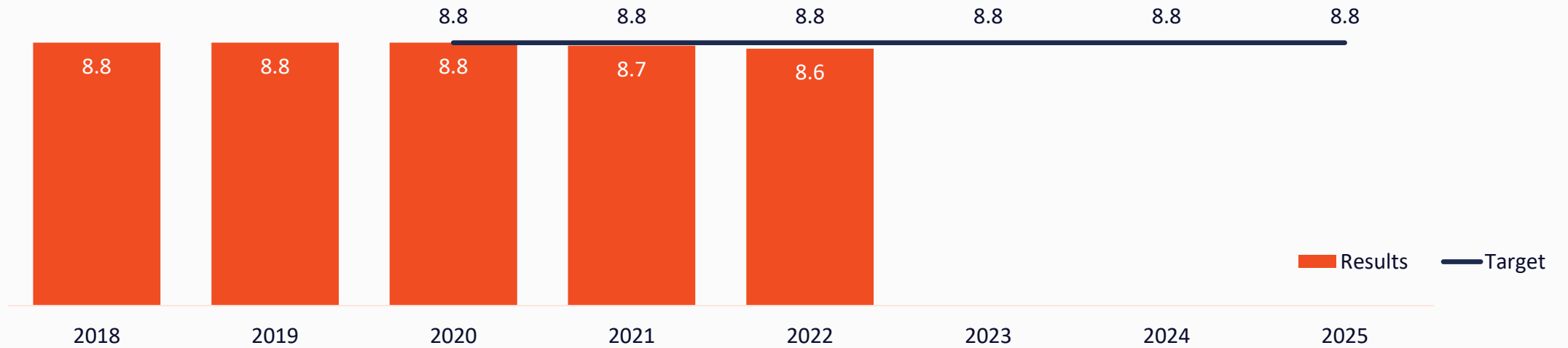


Rec'd all info wanted



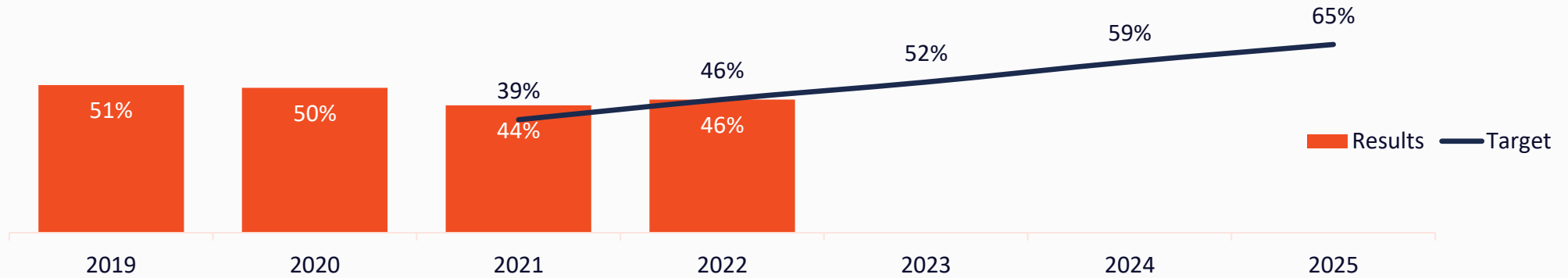
Progress towards targets – Performance Commitment (1)

Trust

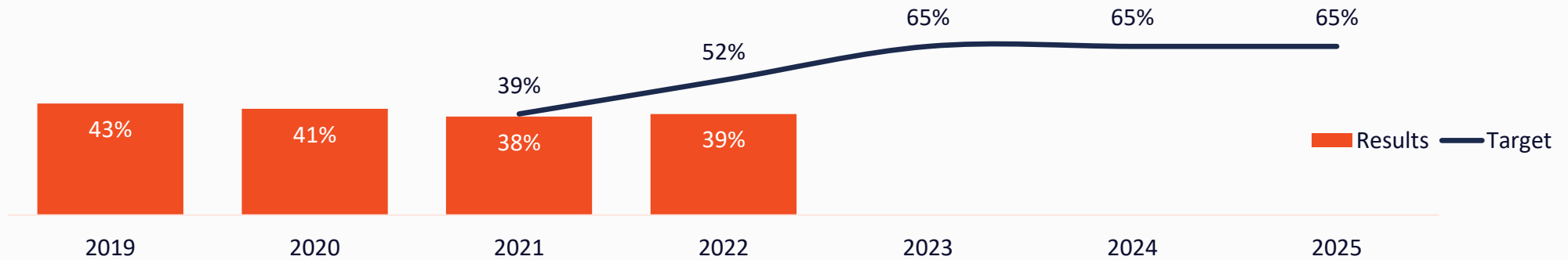


Progress towards targets – Performance Commitment (2)

Awareness of non-financial support services

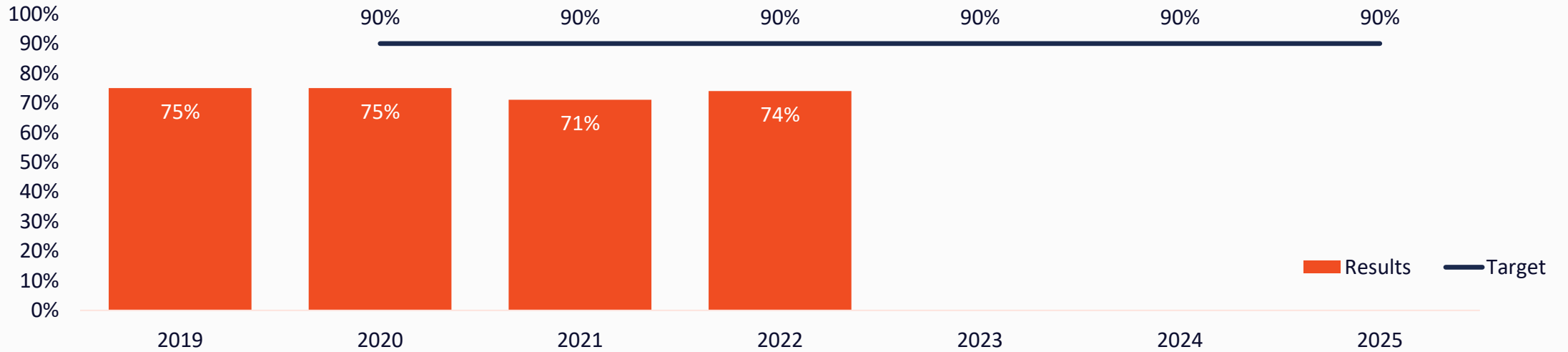


Awareness of financial support services



Progress towards targets – Ambitious Goal

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



The image features a dark blue background with a gradient that transitions to a reddish-orange at the bottom. On the left side, there are several overlapping circles: one orange circle at the top left, and two white circles below it. The text 'TRINITY' is written in orange, and 'MCQUEEN' is written in white, both in a bold, sans-serif font. The text is positioned within the white circles. On the right side, there are two horizontal bars: a dark blue bar on top and a reddish-orange bar on the bottom, both with a slight gradient.

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