

# Q4'22 Domestic Tracker

NWG

13/12/22

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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: 6<sup>th</sup> October – 29<sup>th</sup> November 2022

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 and usage of support services

# NPS

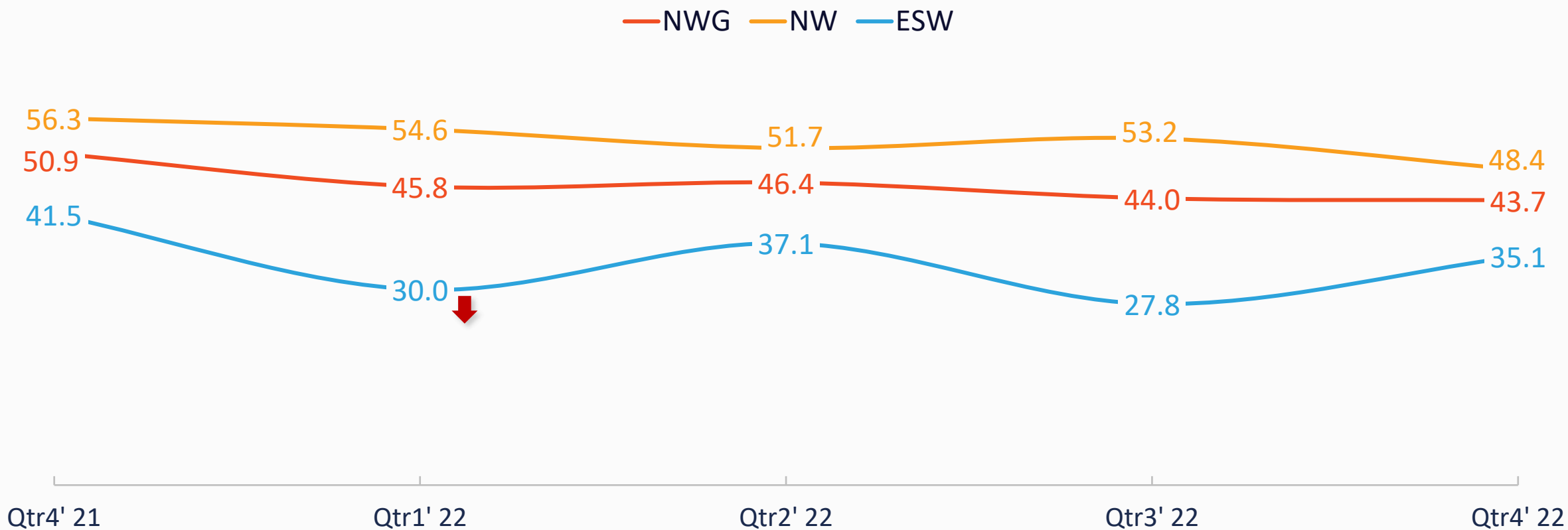


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# Likelihood to recommend NWG - NPS

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) - 278 customers

No problems	58%
Good service/customer service	12%
Good experience/happy with them	11%
No supply problems	10%
Helpful	8%
Good company/good in general/do a good job	8%
Quick response/resolution	7%
Good water quality	6%
Informed/alerted of any issues/works etc	4%
Resolve problems	4%
Been with them for years	4%
Polite/friendly staff/workmen	3%
Good communication/updates/follow-ups/return calls etc	3%
Good/fair price/good value	3%
Nothing to compare against/no choice/no real dealings	14%

## Passives (scores of 7-8) – 125 customers

No problems	40%
Good service/customer service	9%
No supply problems	8%
Good company/good in general/do a good job	7%
Ok/fine/satisfied	6%
Good experience/happy with them	6%
Helpful	5%
Quick response/resolution	5%
Informed/alerted of any issues/works etc	5%
Resolve problems	4%
Good water quality	4%
Never give a 10/always room for improvement	3%
Efficient	2%
Good/fair price/good value	2%
Nothing to compare against/no choice/no real dealings	20%

## Detractors (scores of 0-6) – 71 customers

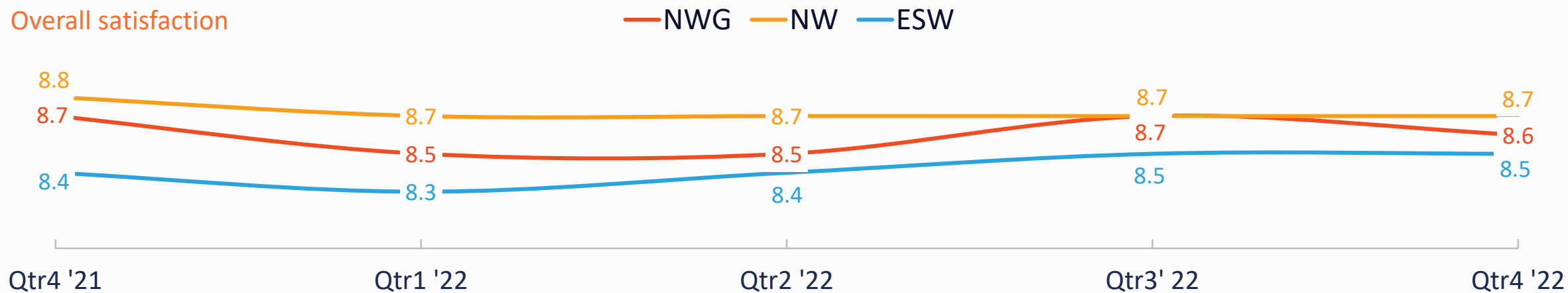
Expensive	15%
Neutral/indifferent	15%
Poor water quality	7%
No problems	4%
No supply problems	4%
Only interested in profit	4%
Ok/fine/satisfied	4%
Would look for best price	3%
Need to do more for the environment – cleaner rivers etc	3%
Good service/customer service	1%
Polite/friendly staff/workmen	1%
Informative/answer questions/advise	1%
Keep promises	1%
Good/fair price/good value	1%
Nothing to compare against/no choice/no real dealings	38%

# Overall Satisfaction

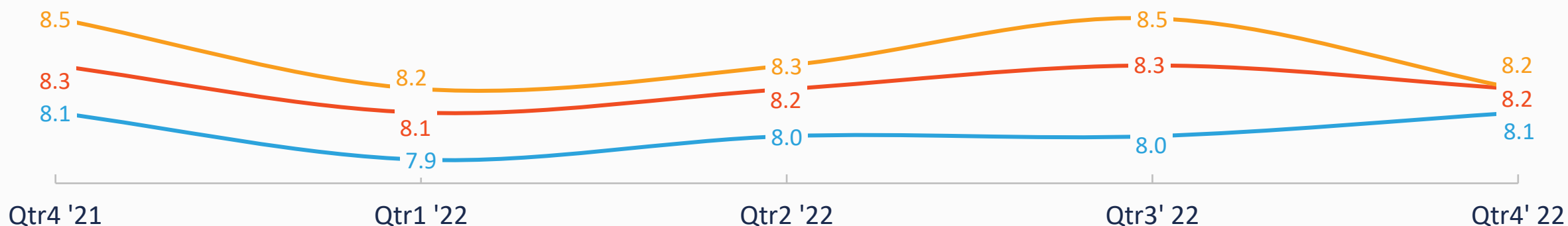


# Satisfaction – overall & value for money

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



NW    9.2   9.1   9.0   9.2  9.1

8.8   8.8   8.8   8.9   8.8

9.5   9.4   9.4   9.5   9.4

ESW    8.8   8.9   8.5  8.6   8.9

8.4   8.7   8.4   8.4   8.6

9.3   9.4   9.2   9.4  9.4

# Service satisfaction (2)

NWG

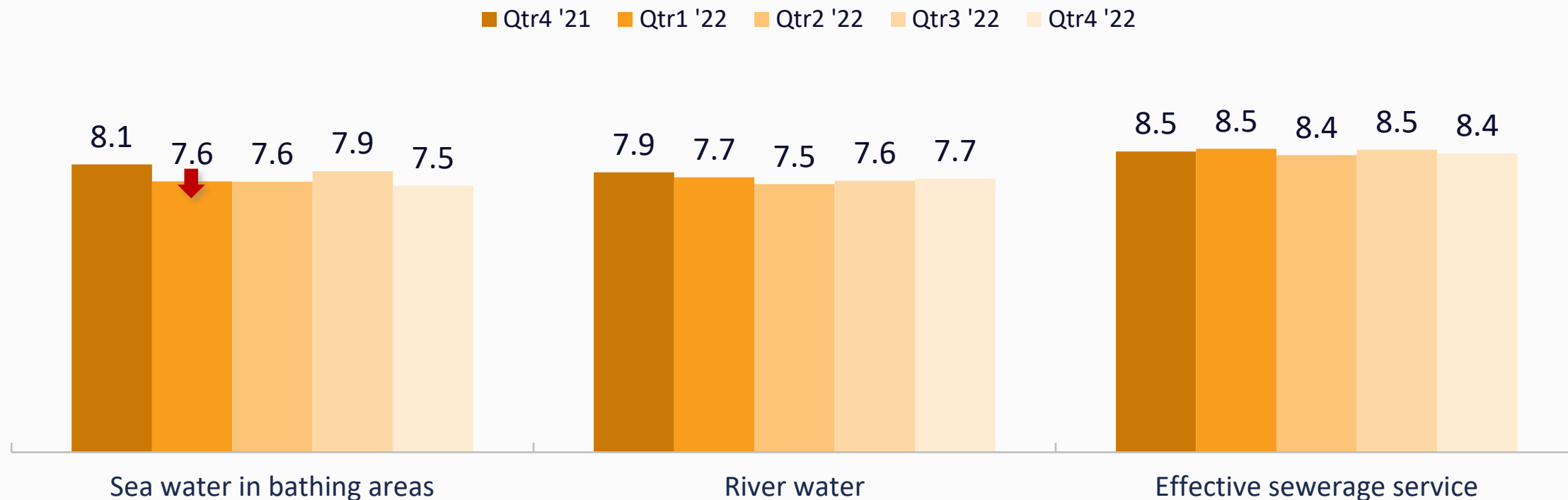
■ Qtr4 '21 
 ■ Qtr1 '22 
 ■ Qtr2 '22 
 ■ Qtr3 '22 
 ■ Qtr4 '22



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

# Service satisfaction (NW only)

NW region only



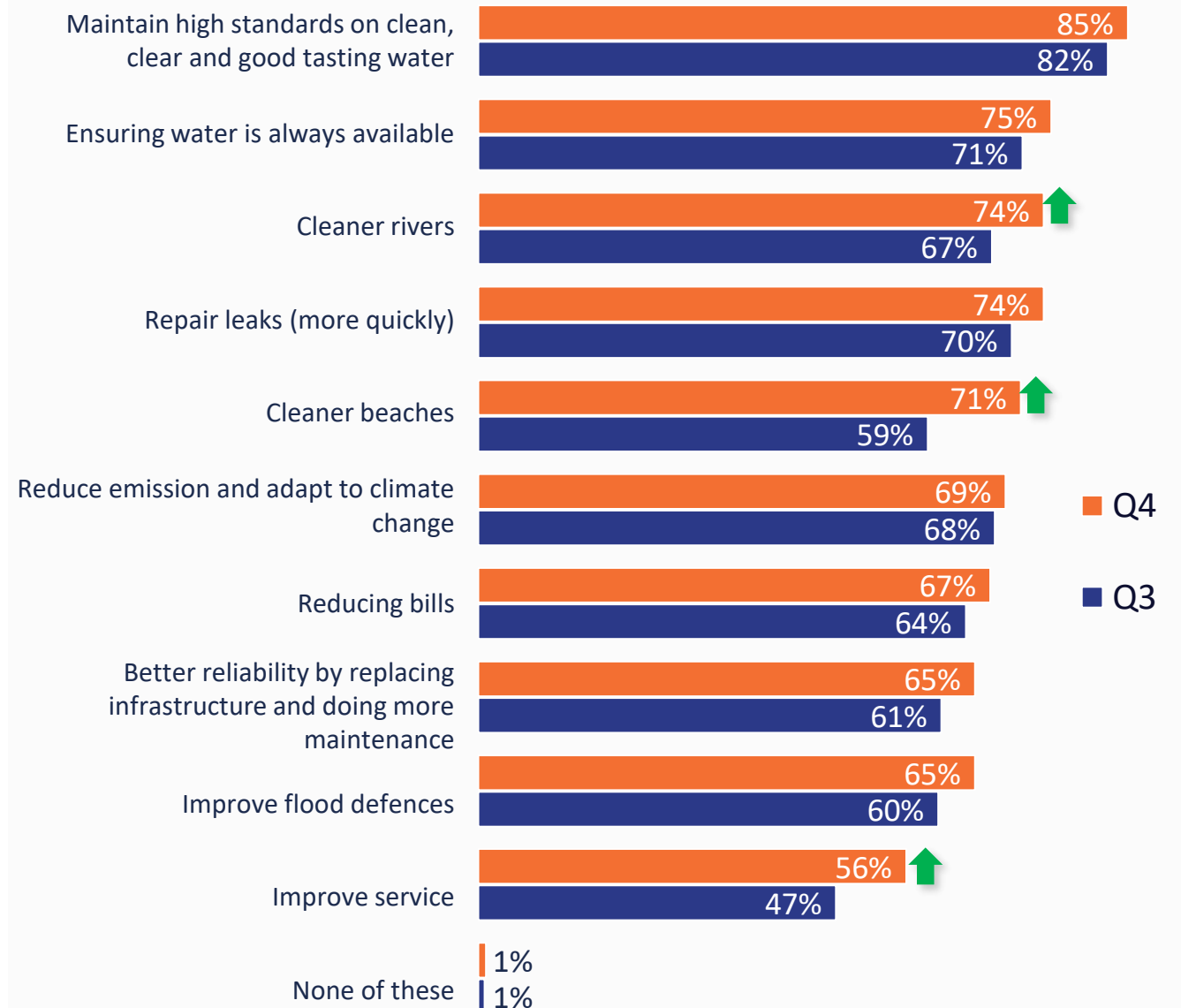


## Areas of the business plan that respondents think should be a priority

(NWG)

### NWG Total

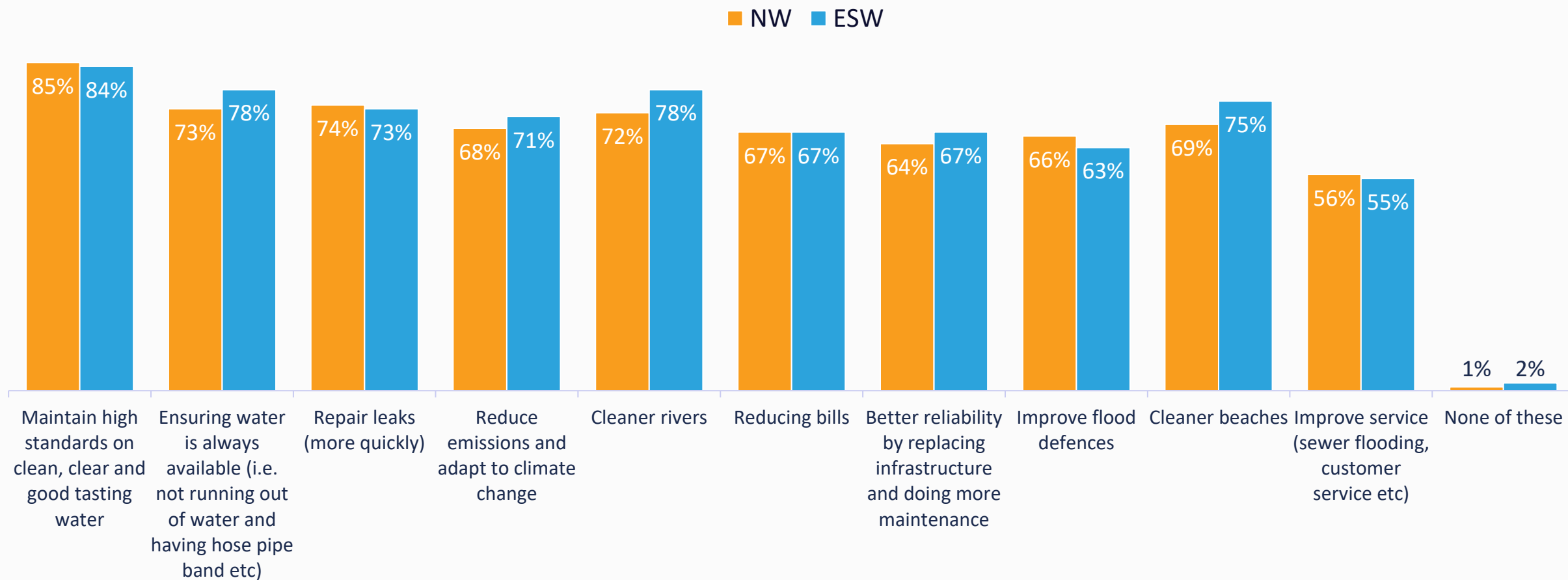
↑ ↓ Significantly higher/Lower than previous Qtr



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)



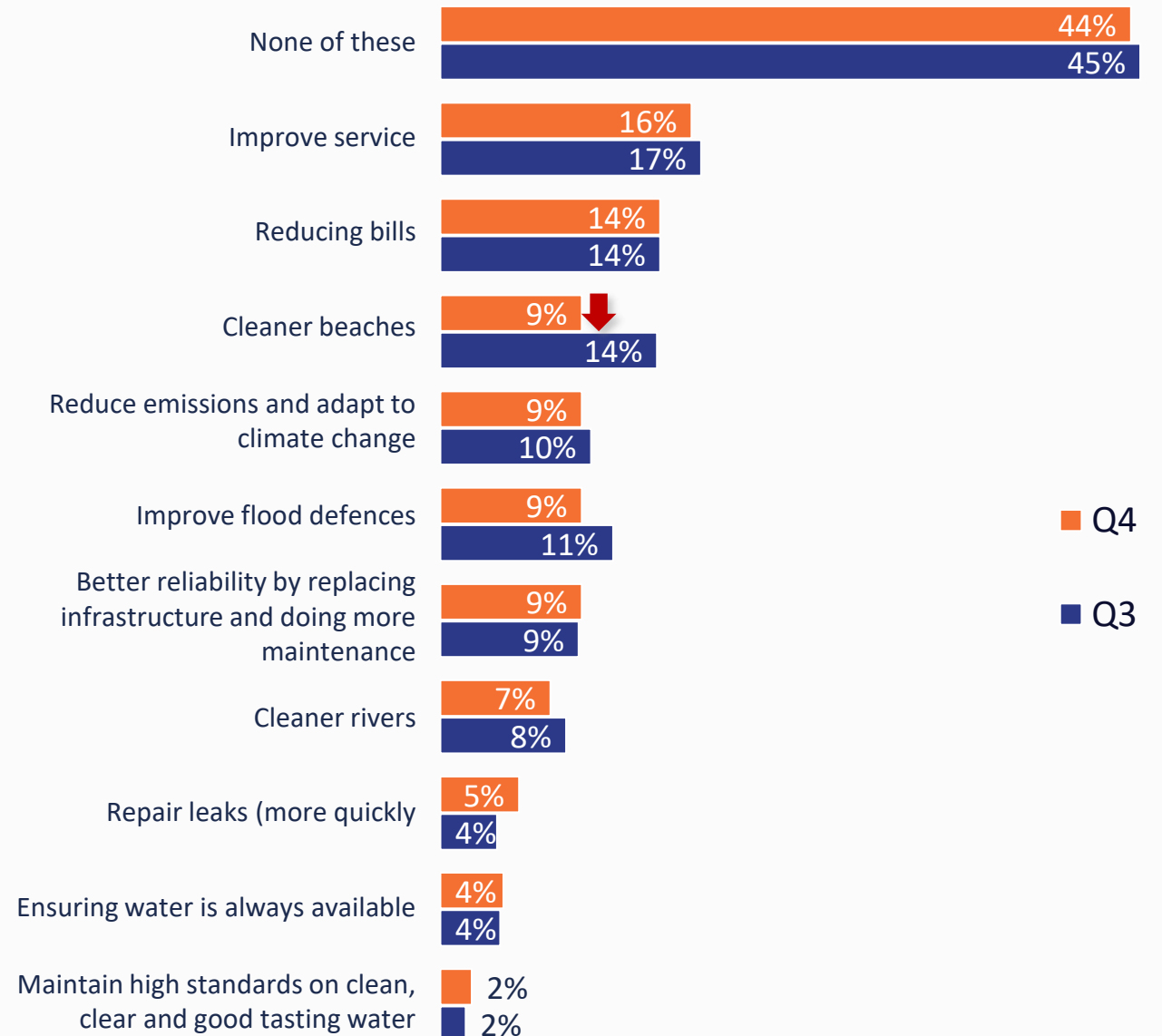


## Areas of the business plan that respondents think are less important

(NWG)

### NWG Total

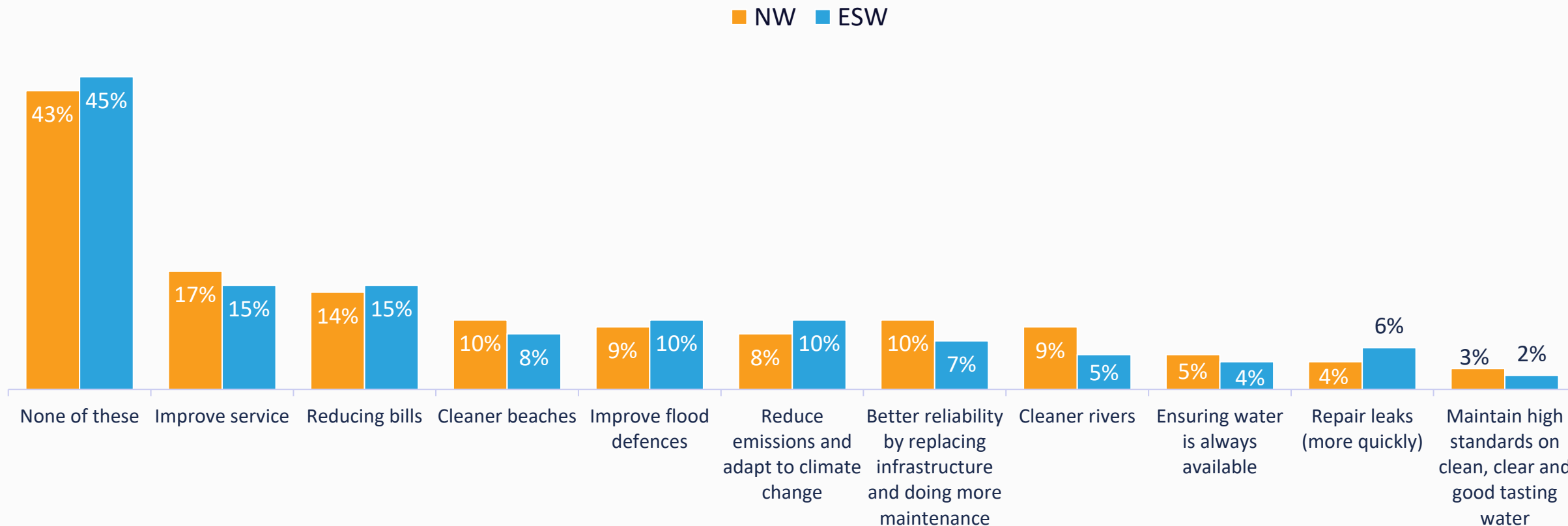
↑ ↓ Significantly higher/Lower than previous Qtr



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)

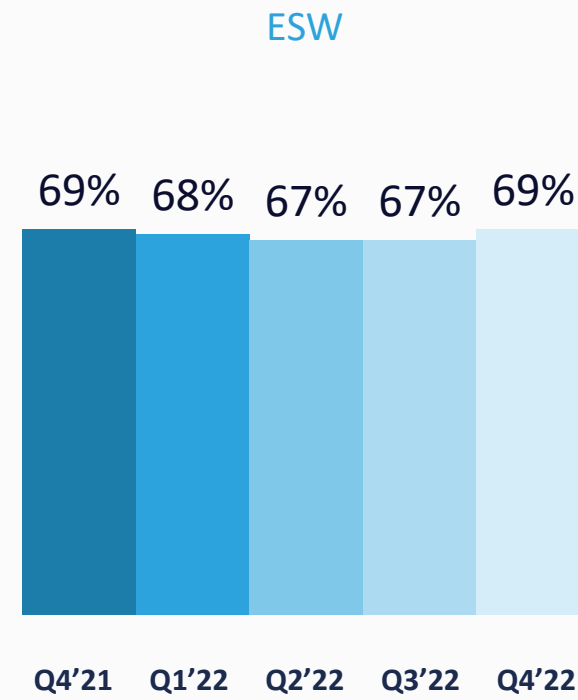
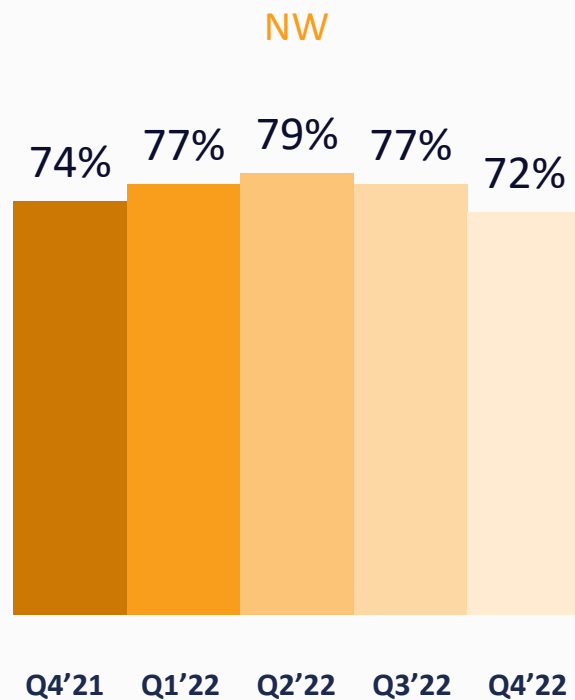
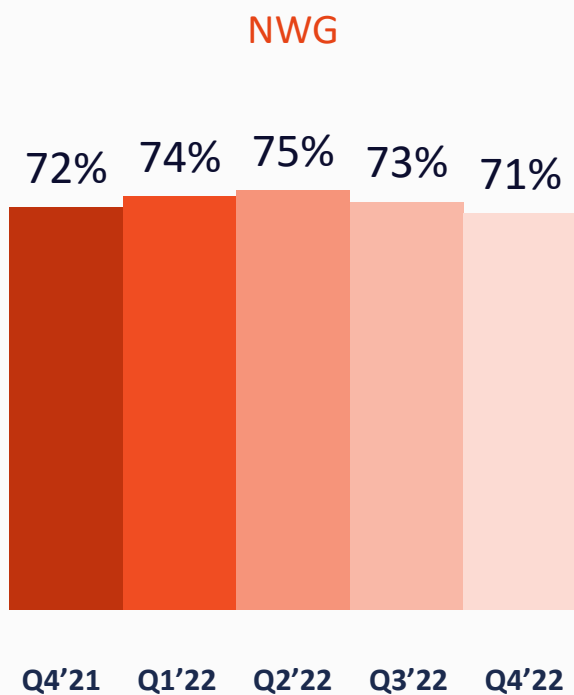
# Company suggestions and preferences





# Tap water preference

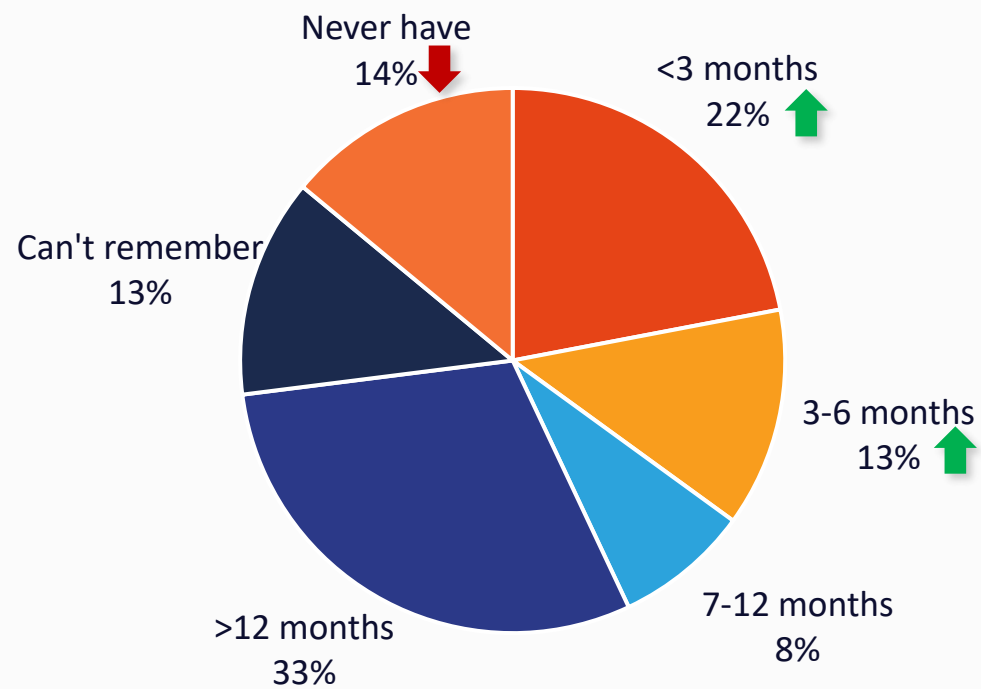
% who prefer tap water over bottled water



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?



# Brand values



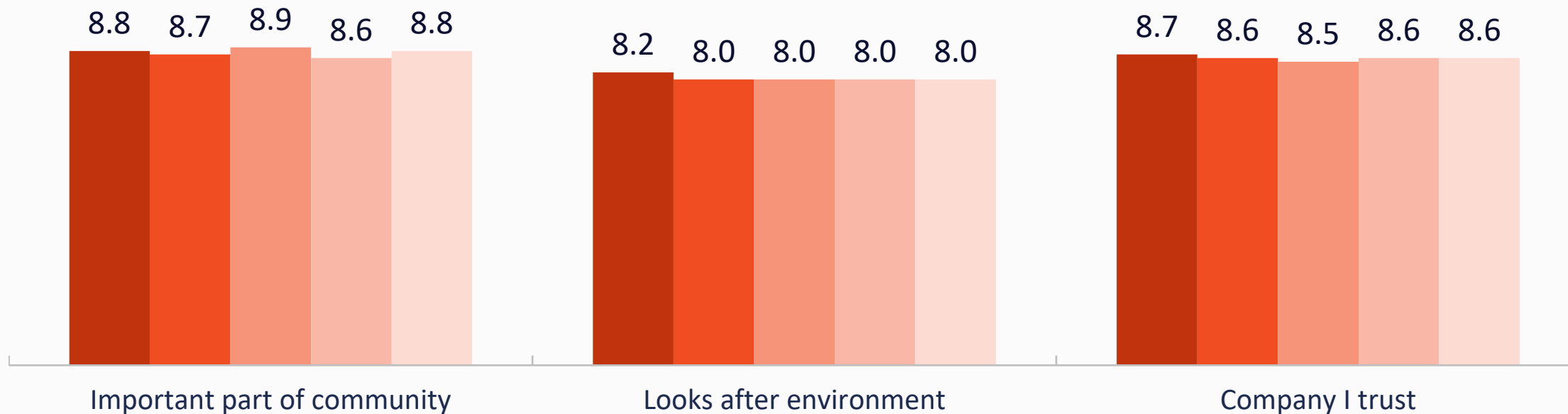
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# Brand values

## Overall service satisfaction

■ Qtr 4 '21 
 ■ Qtr 1 '212 
 ■ Qtr 2 '22 
 ■ Qtr 3 '22 
 ■ Qtr4 '22



	Qtr 4 '21	Qtr 1 '212	Qtr 2 '22	Qtr 3 '22	Qtr4 '22
NW	9.0	8.8	8.8	8.7	9.0
ESW	8.6	8.5	8.5	8.3	8.4

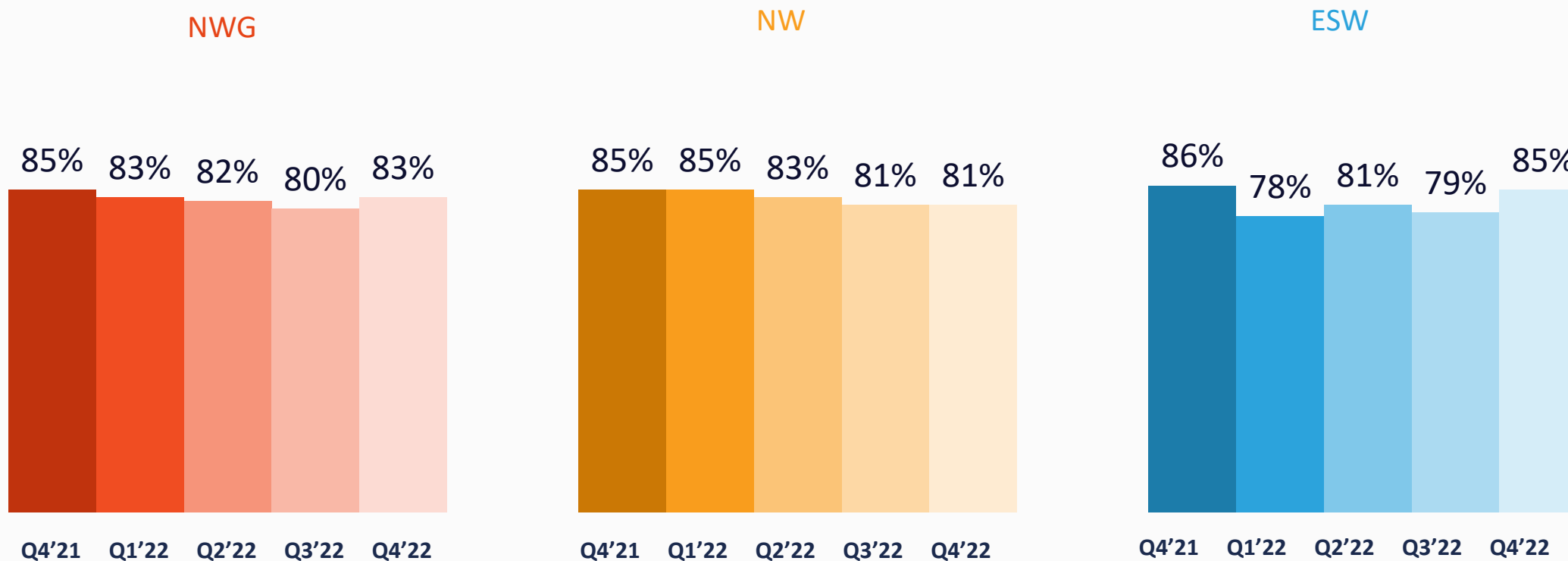
Q12 Thinking now about your overall impressions of [Northumbrian Water/Essex & Suffolk Water], to what extent would you agree or disagree with the following statements? Please use a scale of 0 to 10, this time where 0 is strongly disagree and 10 is strongly agree. Base NWG (500), NW (316), ESW (184)

# Information and services



# Information and services access

% Received all information wanted, to feel informed



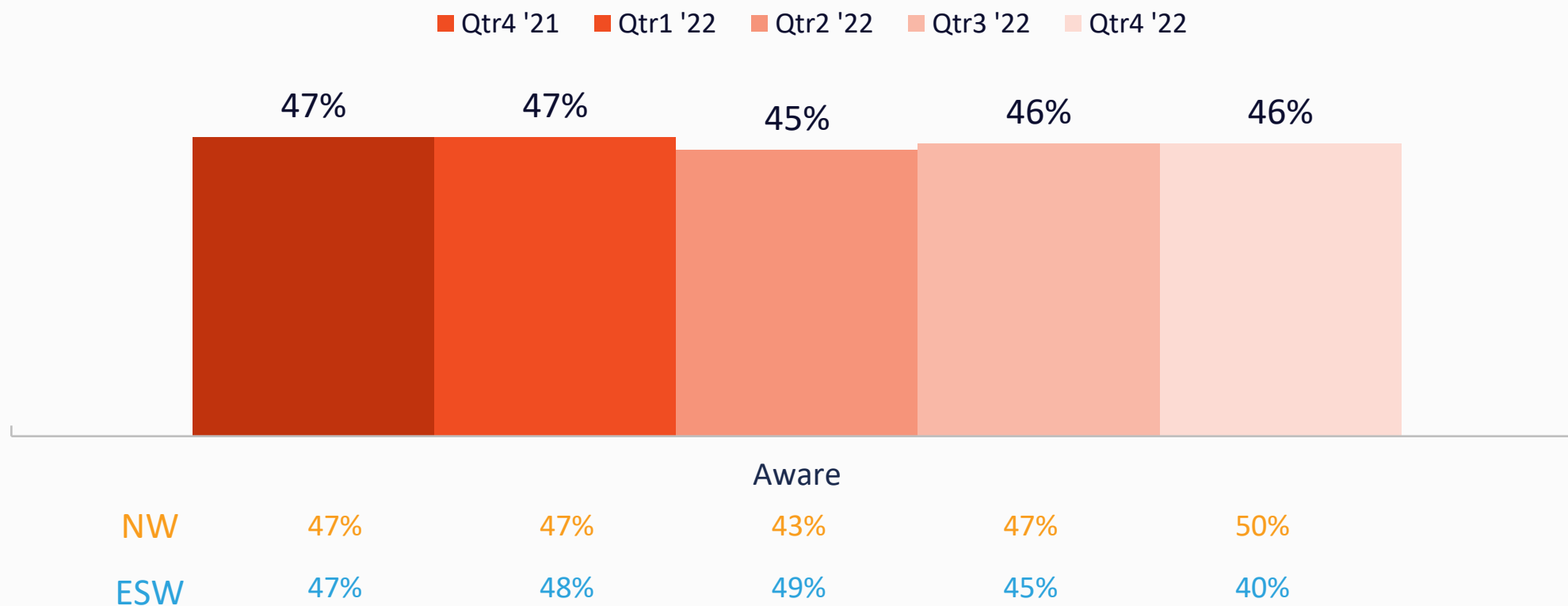
Q8: Has [Northumbrian Water/Essex & Suffolk Water] supplied you with all the information you want, to feel informed about water [NW: and sewerage] services in your area? Base NWG (500) NW (316) ESW (184)

# Priority services



# Priority services (1)

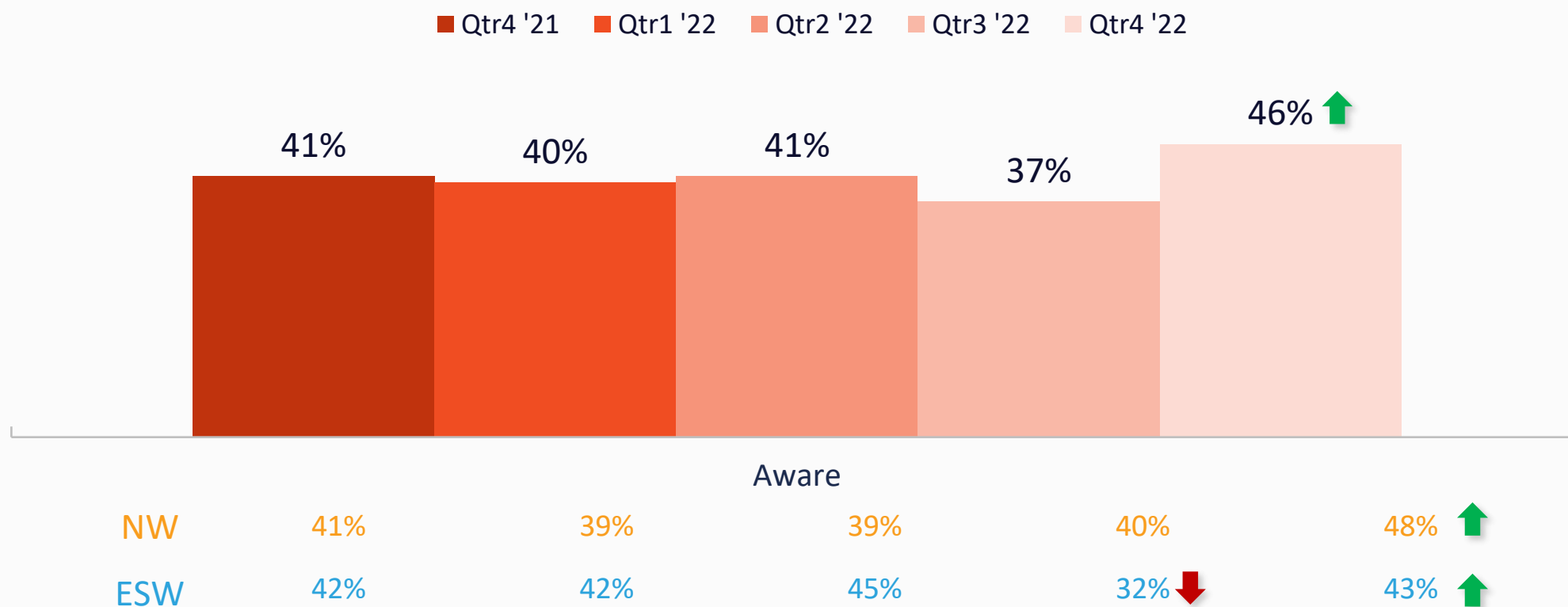
## Awareness of additional support services





# Priority services (2)

## Awareness of additional financial services



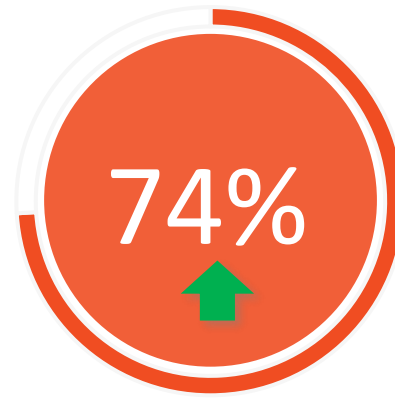
# Key headlines

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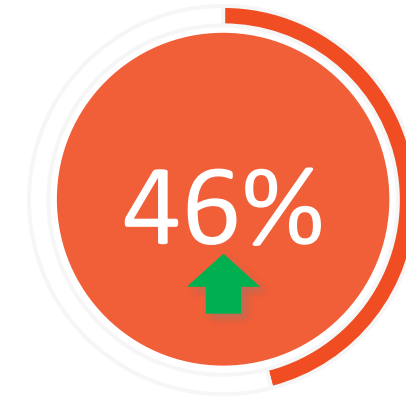
## NPS this quarter

NWG NPS has remained broadly consistent throughout 2022. NPS amongst ESW has seen a slight increase in Q4 (to 35.1)



## Cleaner rivers a priority

A significantly higher proportion of NWG customers in Q4 believe cleaner rivers and also cleaner beaches (71%) are a priority compared to in Q3



## Awareness of financial services

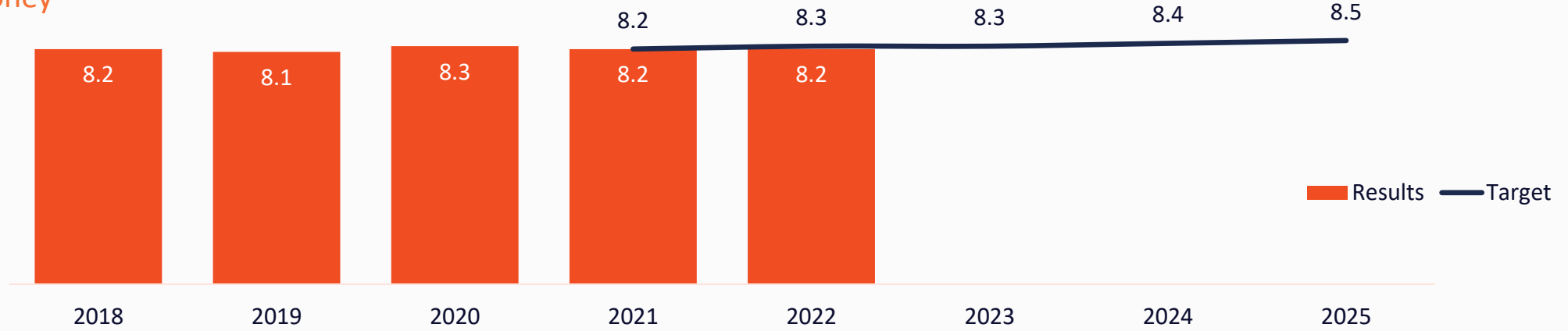
The percentage of NWG customers aware of additional financial services has significantly increased versus Q3, driven by those in the NW region.

# Progress and targets

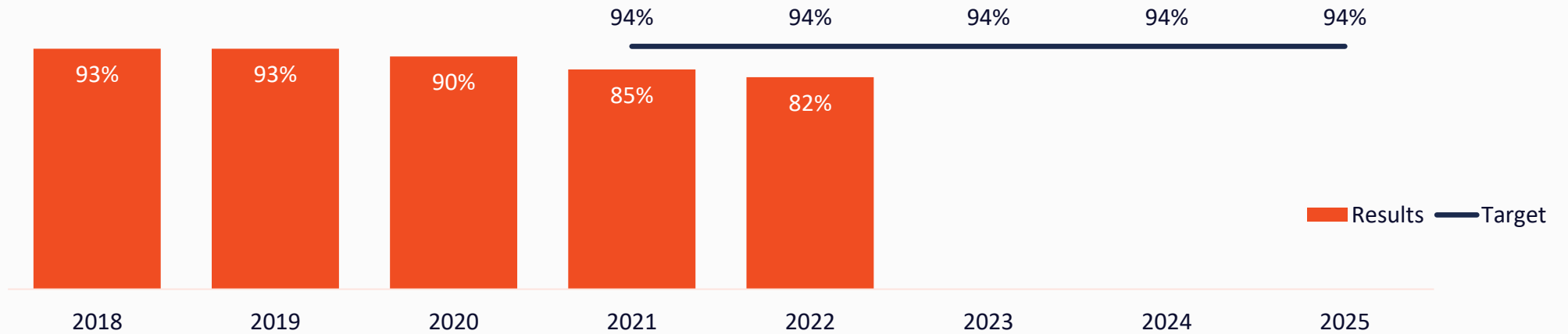


# Progress towards targets – Business Plan Outcome

## Value for money

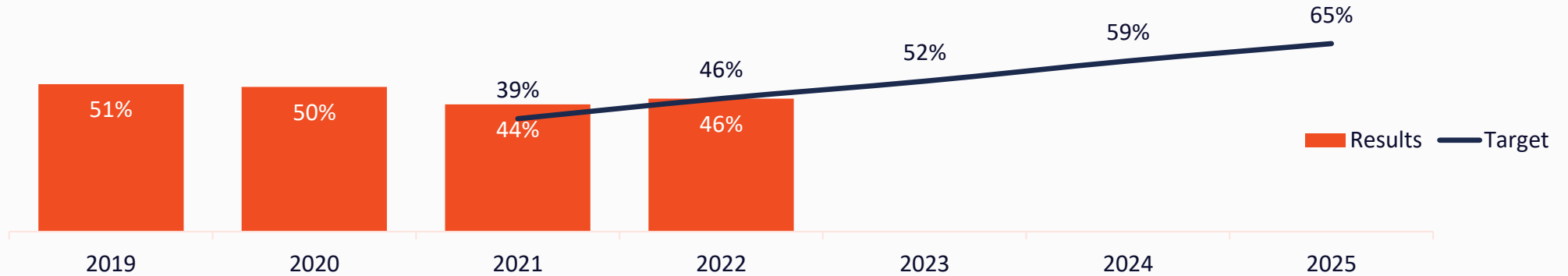


## Rec'd all info wanted

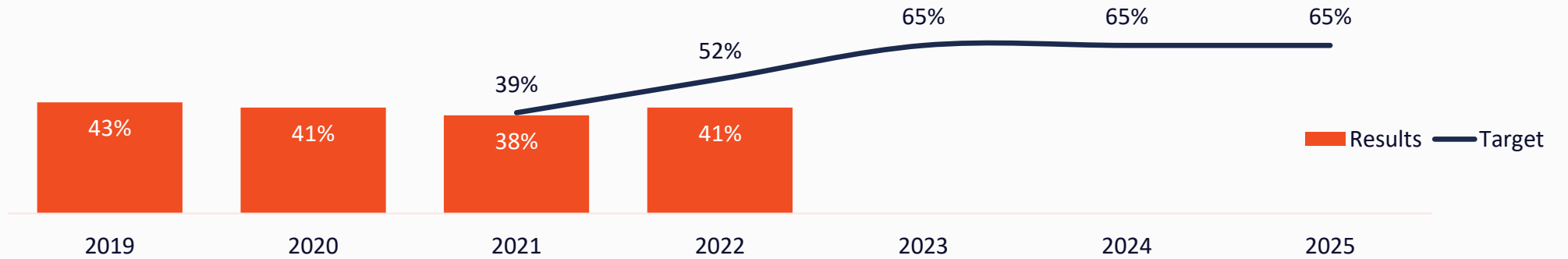


# Progress towards targets – Performance Commitment

## Awareness of non-financial support services

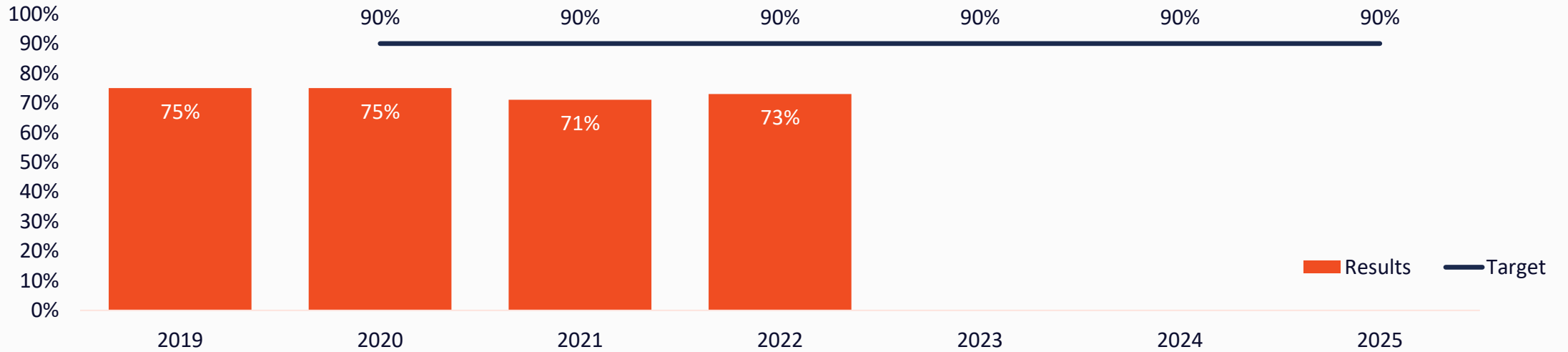


## Awareness of financial support services



# Progress towards targets – Ambitious Goal

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



The image features a dark blue background on the left that transitions into a bright orange gradient on the right. On the left side, there are several overlapping circles: a large white one, a smaller orange one, and a very large white one that spans across the transition. 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 the large white circle on the left side of the image.

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