

Accent

ESSEX & SUFFOLK
WATER *living water*

NORTHUMBRIAN
WATER *living water*

E075



Stakeholder Tracking Research

Year 4 Quarter 1

Contents

- 1 Background, Methodology and Objectives
- 2 Net Promoter Score
- 3 Contact
- 4 Overall Satisfaction
- 5 Conclusions
- 6 Participant Classification



Background, Methodology and Objectives



Background and Methodology



- This research provides Northumbrian Water (NW) and Essex & Suffolk Water (ESW) with a tracker of stakeholder views to include in their balanced scorecard
- This report is based on research undertaken in February/March 2020 (Year 4, Quarter 1). It draws some comparisons with the previous quarter in December 2019/January 2020 (Year 3, Quarter 4)
- 50 telephone interviews were completed for this wave: 31 in NW area, 9 in E&SW and 10 participants were provided waste and services by another company
 - The 10 participants were allocated to NW or E&SW depending on the location of the water and waste companies: six to E&SW and four to NW
 - The 50 interviews therefore comprised 35 NW and 15 E&SW
- The interviews lasted 9 minutes on average
- Some of the base sizes shown are small, so caution must be used when interpreting these results
- Significant differences are noted in the analysis. Where non-significant comparisons are included, these are labelled as such (NS = Not Significant)

Objectives

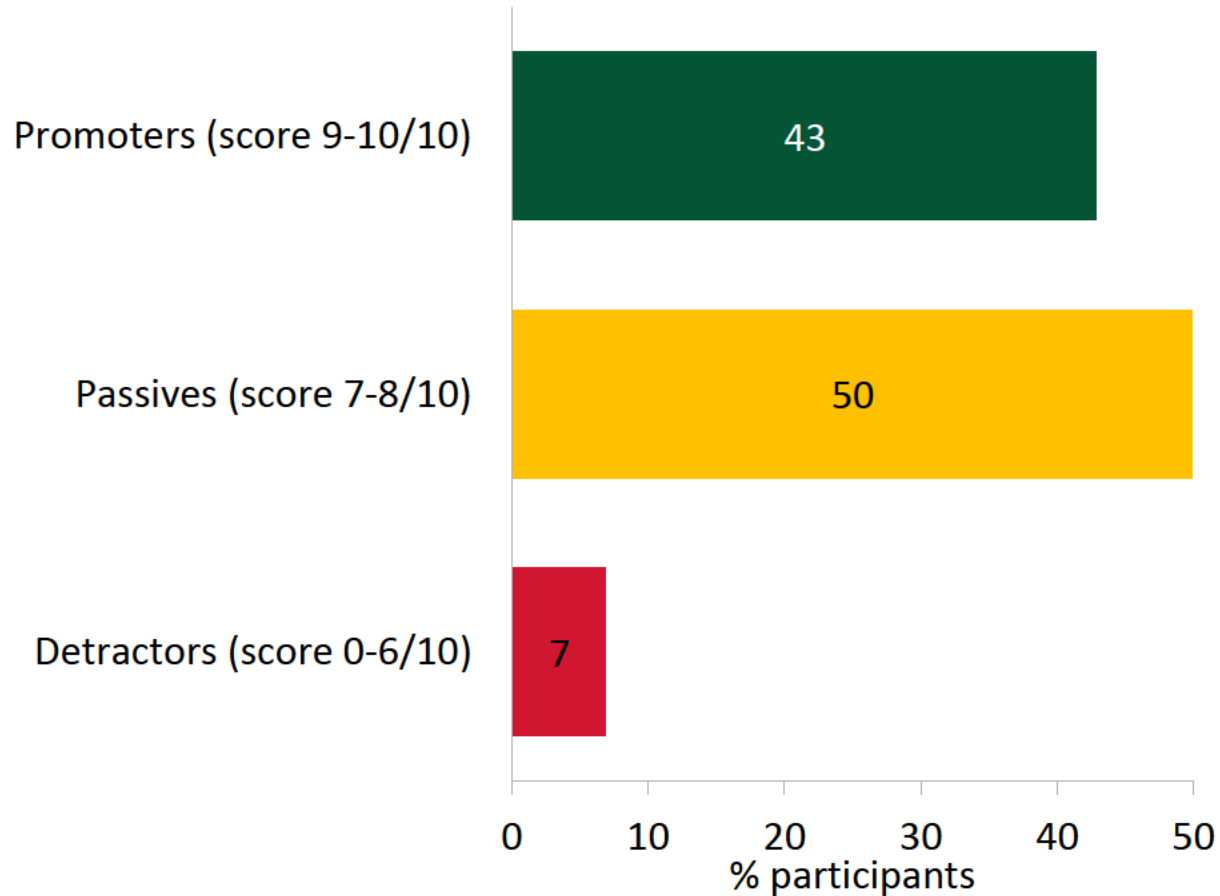


- To understand perceptions of media, NGO & public affairs stakeholders on a quarterly basis to feed into a new measure for NWG's scorecard. In particular, NWG wishes to measure:
 - likelihood to recommend NWG
 - suggestions for improvement
 - contact with NWG
 - value for money
 - satisfaction (overall and with specific measures)
 - trust
 - image (specific measures)

Net Promoter Score



NPS is +36 this quarter, a significant increase since last quarter

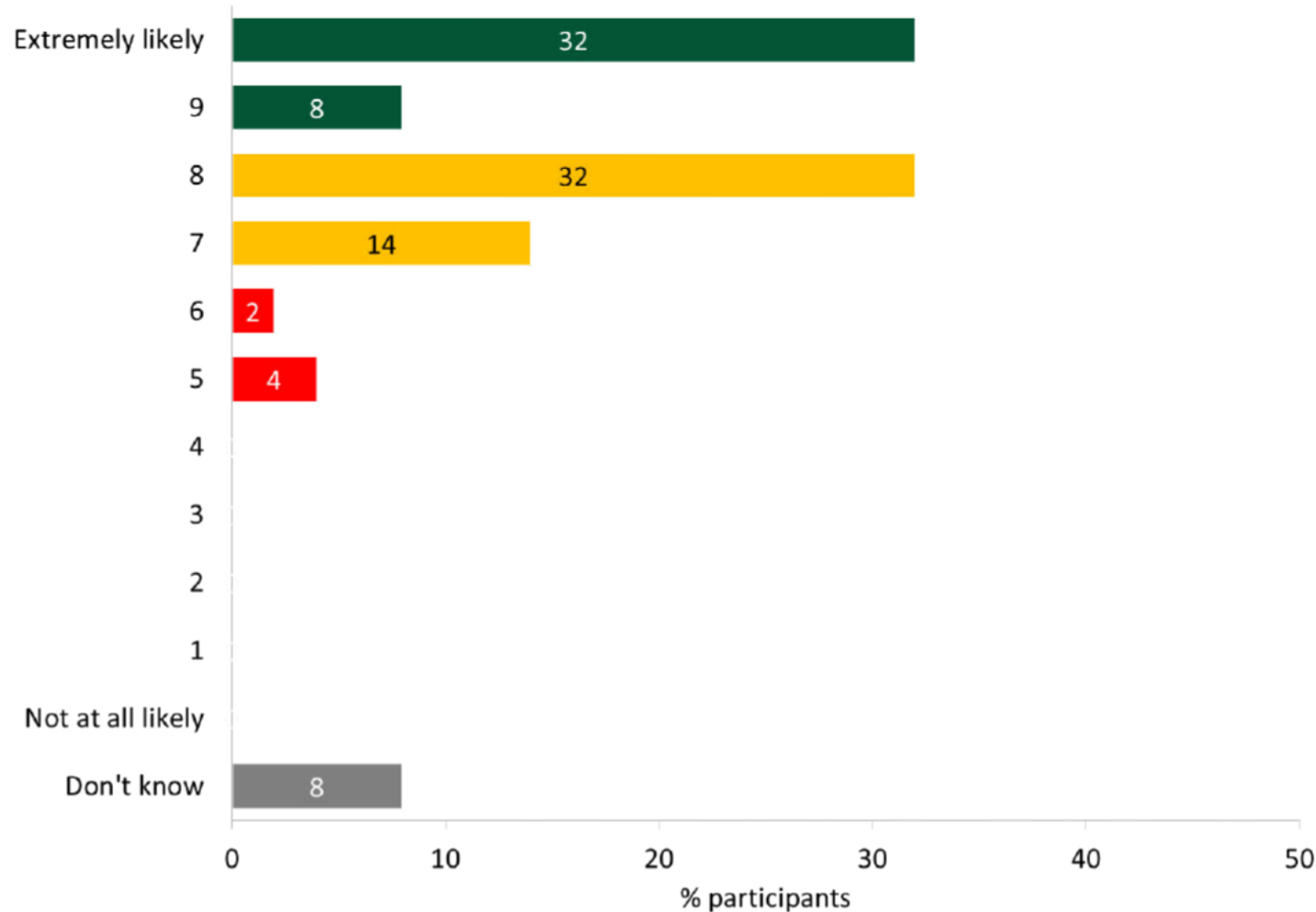


**NPS:
+36**

NPS:
Y4Q1: +36
Y3Q4: +3
Y3Q3: +32
Y3Q2: +24
Y3Q1: +33
Y2Q4: +24
Y2Q3: +27
Y2Q2: +25

The significant increase in NPS from Y3Q4 to Y4Q1 reflects a significantly higher proportion giving a score of 10/10 in Q1 (32%) than Q4 (12%). There were significantly more detractors in Q4 than Q1: 30% vs 7%

Recommendation levels for NW/ESW have significantly increased in Q1; (32% gave the top score vs 12% last quarter)



Y4 Q1 mean score: 8.46
Y3 Q4 mean score: 7.32
Y3 Q3 mean score: 8.16
Y3 Q2 mean score: 7.95
Y3 Q1 mean score: 8.13
Y2 Q4 mean score: 9.12
Y2 Q3 mean score: 8.8
Y2 Q2 mean score: 9.02

Mean score has significantly increased this quarter in comparison to the previous quarter

This quarter's NPS is +36

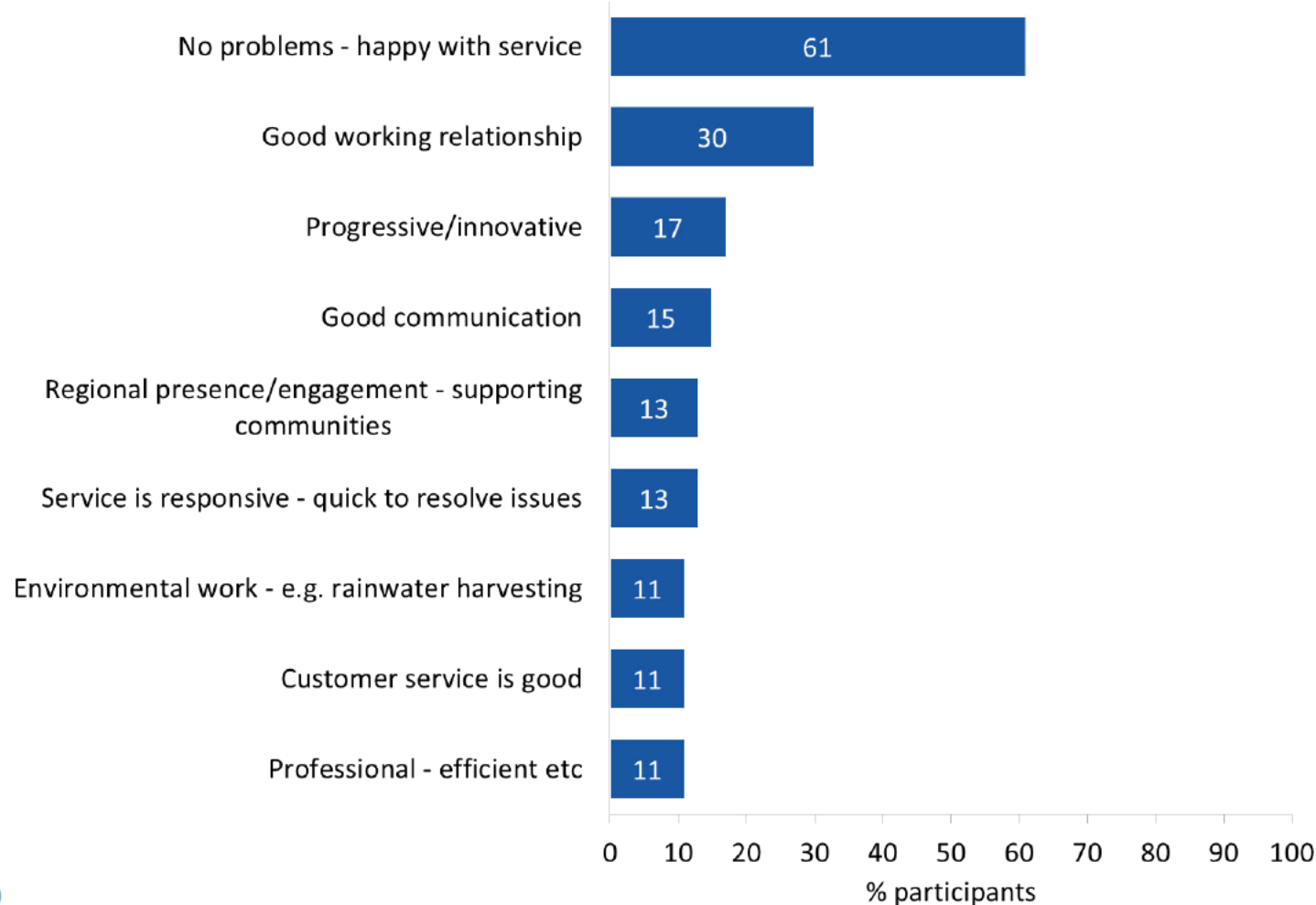


	NW	ESW	NWG
2017 Quarter 1	30	56	40
2017 Quarter 2	28	12	22
2017 Quarter 3	48	-17	20
2017 Quarter 4	54	11	36
2017 Full Year	39	15	30
2018 Quarter 1	53	27	42
2018 Quarter 2	24	26	25
2018 Quarter 3	37	0	27
2018 Quarter 4	21	N/A	24
2018 Full Year	32	21	30
2019 Quarter 1	33	31	33
2019 Quarter 2	17	33	24
2019 Quarter 3	59	-45	32
2019 Quarter 4	15	-23	3
2019 Full Year	32	8	23
2020 Quarter 1	58	-7	36

Q4: If you could choose your water provider, how likely would you be to recommend Northumbrian Water/Essex & Suffolk Water to friends or family? Base 2019 Wave 2: All participants who gave a rating for recommending NWG (46)

Main reason for likelihood to recommend is no problems with service (as in previous quarters)

Top mentions



In Y4 Q1, more people were likely to recommend NWG because of a 'Good working relationship' than in Y3 Q4:
Q1 30% vs Q4 10%

Comments on recommendation score given

I had a real problem with Northumbrian Water, a major water mains leak under my house and they were reluctant to do anything initially because of the sewerage drains close by. Eventually they put a new mains in but I had to pay for it, I do not know why they did not do this three years ago.

Because I think Northumbrian Water are an excellent company, the service is very good in the area. I believe they are one of the most ethical water companies due to their approach with zero carbon emissions and work they do with organisations like WaterAid.

They are innovative, at the Innovation Festival they seem to make contributions and are good at communicating.

Because the majority of my experience with Essex & Suffolk Water is through complaints however my actual experience dealing with them has been quite good.

They're user friendly, very easy to use and deal with compared to other water authorities, and their service is pretty good, to be fair.

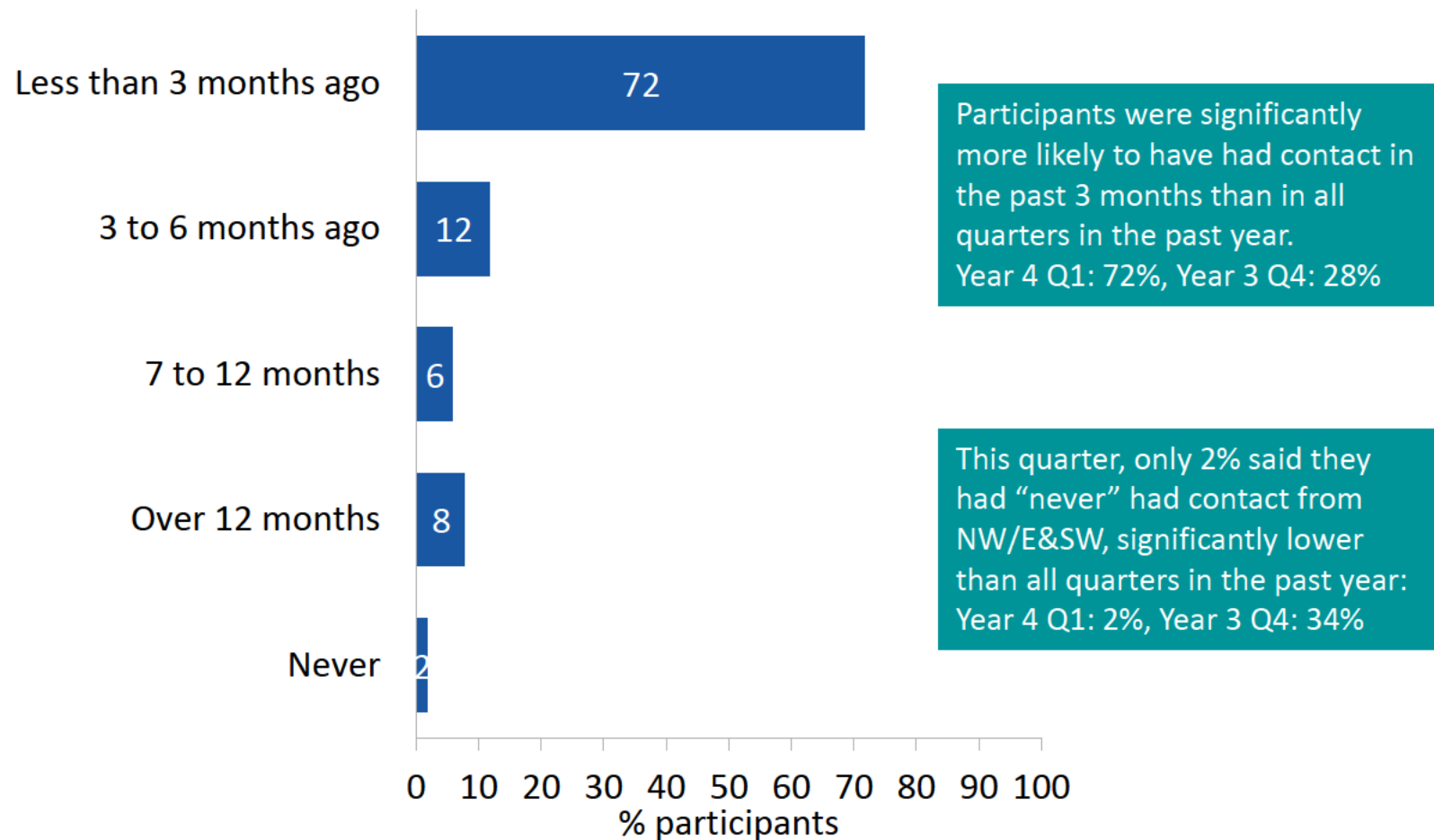
Because generally we have had a pretty decent service, we work very well together and have good communication.

Because I think Northumbrian Water Group have a pretty strong performance but it is not the best in the sector. They have a good range of positives but I believe they may have slipped up in their customer complaints department.

Contact



Just under three quarters had recent contact with NW/ESW; significantly higher than the past year



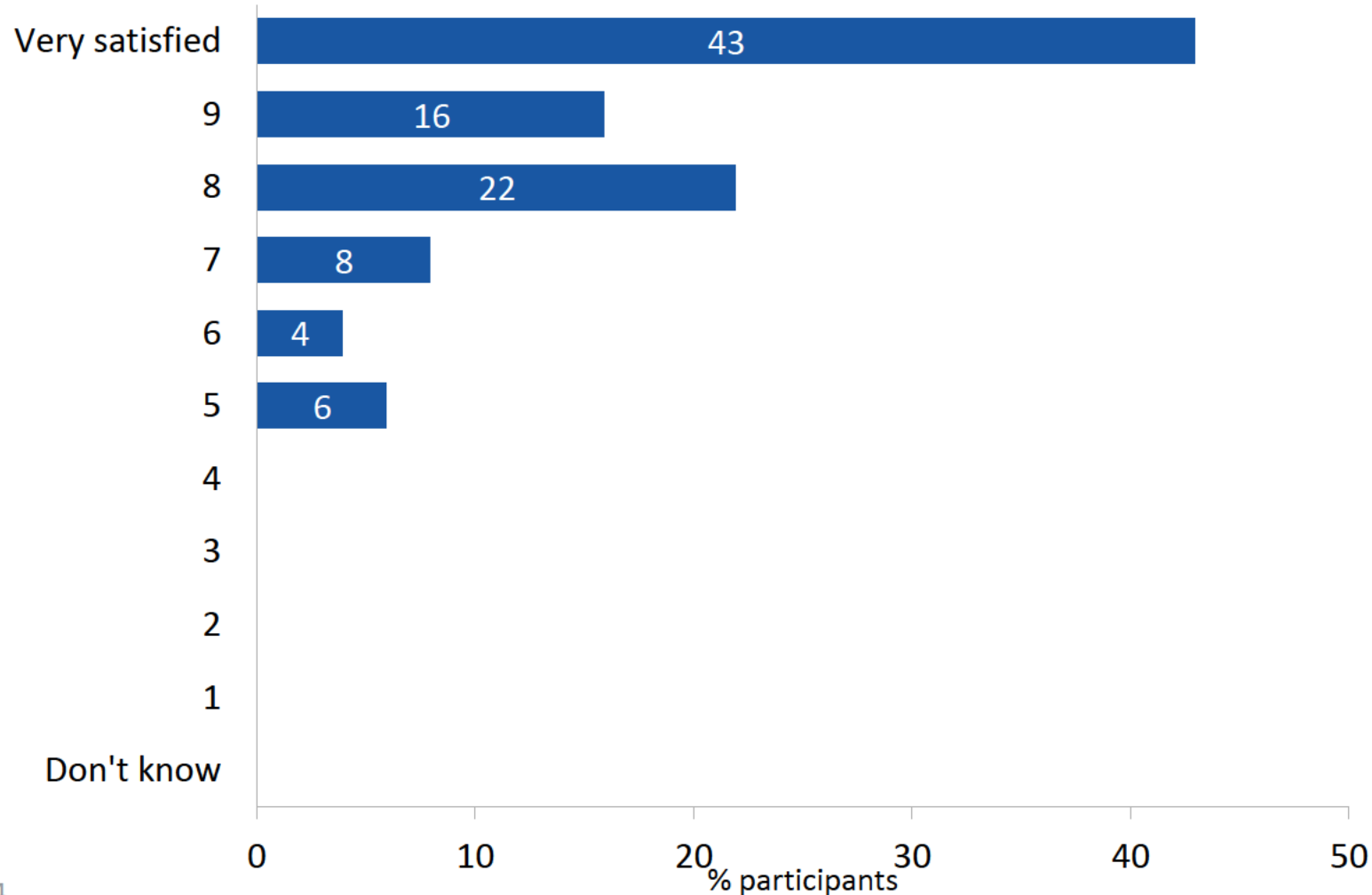
Nature of the contact

Email	35%
Events in your area	16%
Traditional media	6%
Social media	2%
Dedicated newsletter	2%
Other	65%

Traditional media was significantly more likely to be mentioned last quarter (36%) than in this quarter (6%)

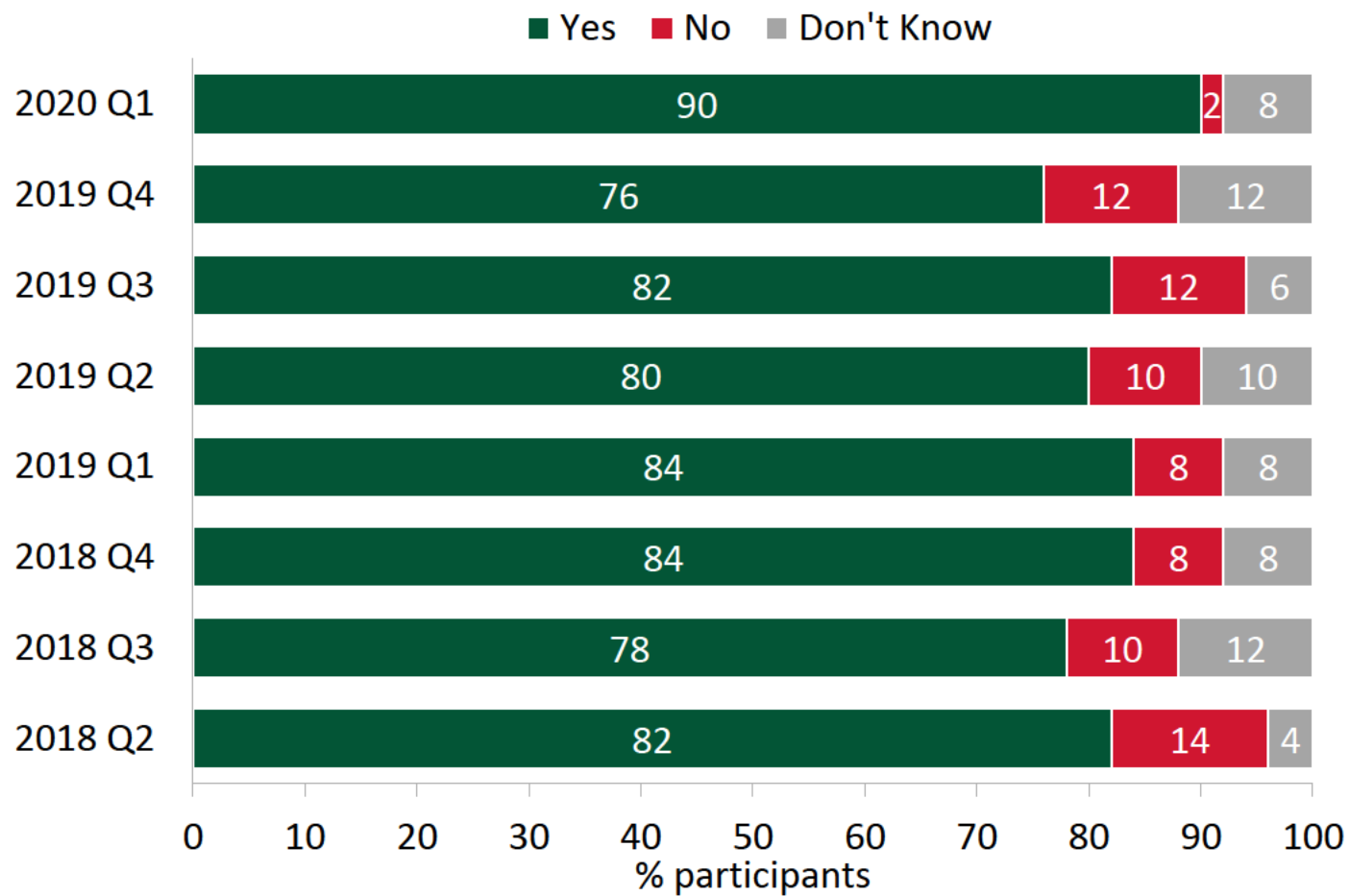
Q8a. What was the nature of your last contact with Northumbrian Water/Essex & Suffolk Water? Base: All those who had had contact with NW/ESW (49)

Two in five scored 'Very satisfied' for satisfaction with their contact with NW/ESW



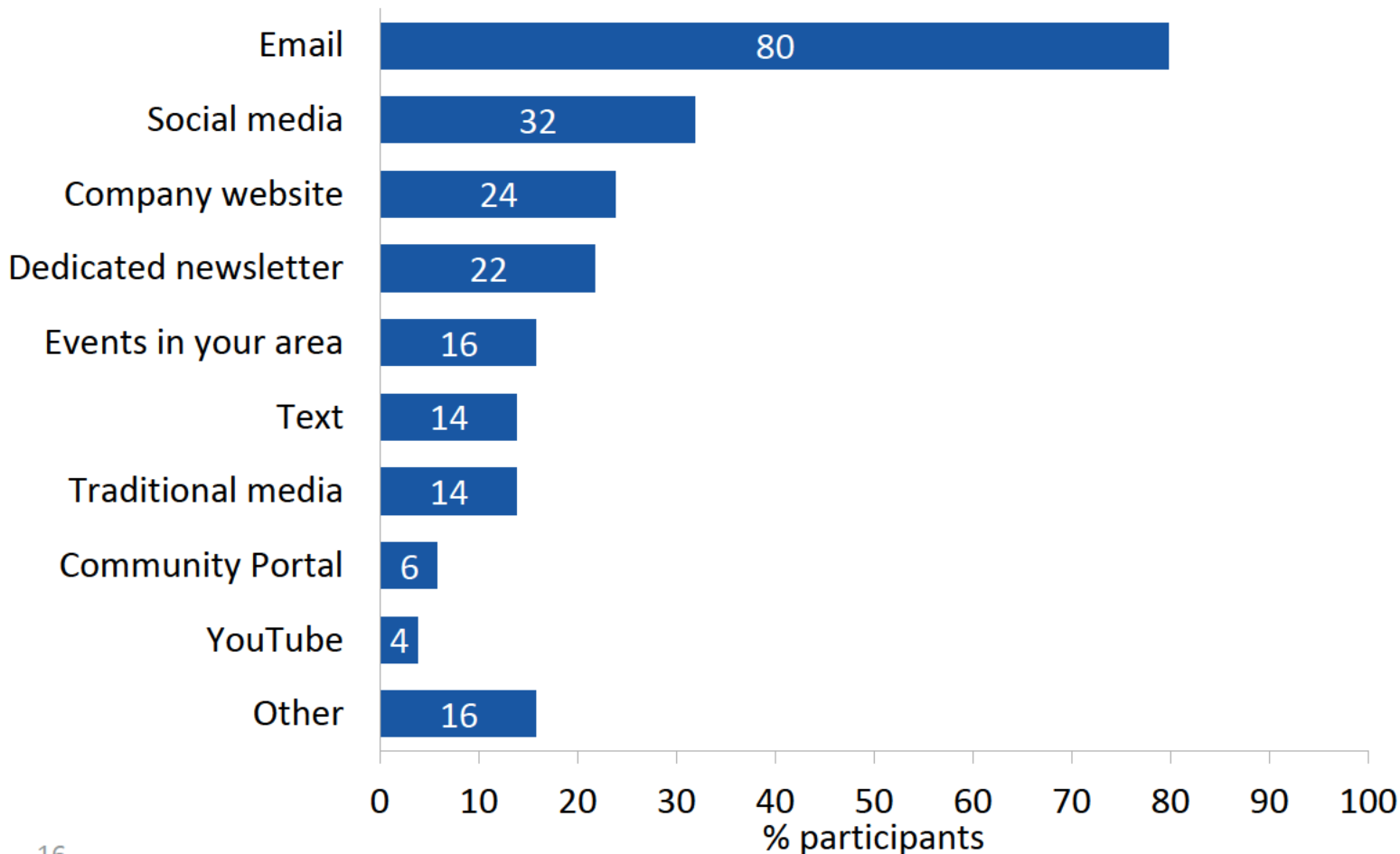
The mean score (8.67) was on a par with last quarter (8.7)

Nine in ten feel that NW/ESW supplied them with all the information they need, a small increase since the last quarter (NS)



As in previous waves, email is by far the most popular form of communication from NW/ESW

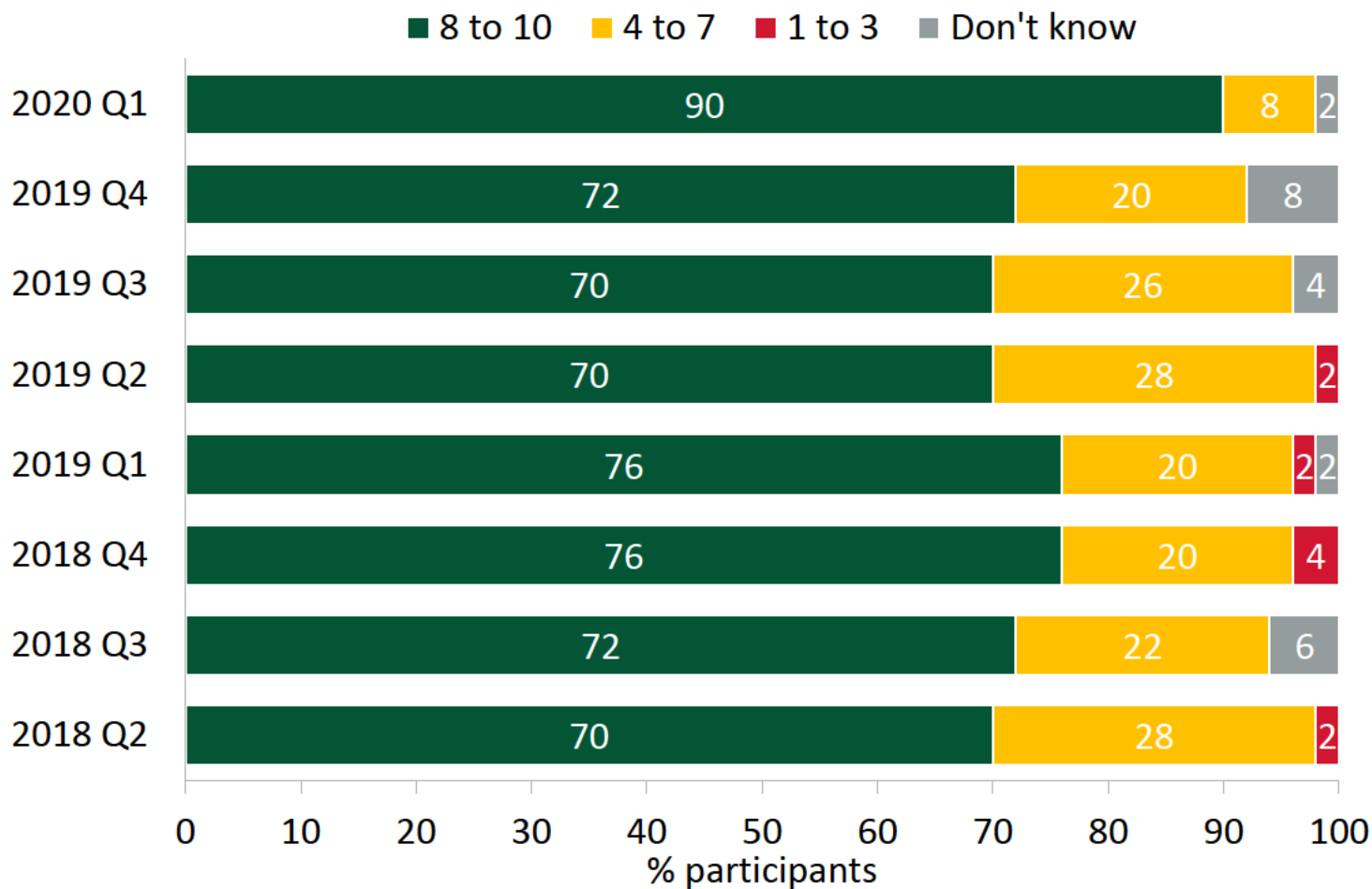
Preferred means of receiving regular information from NW/ESW



Overall Satisfaction

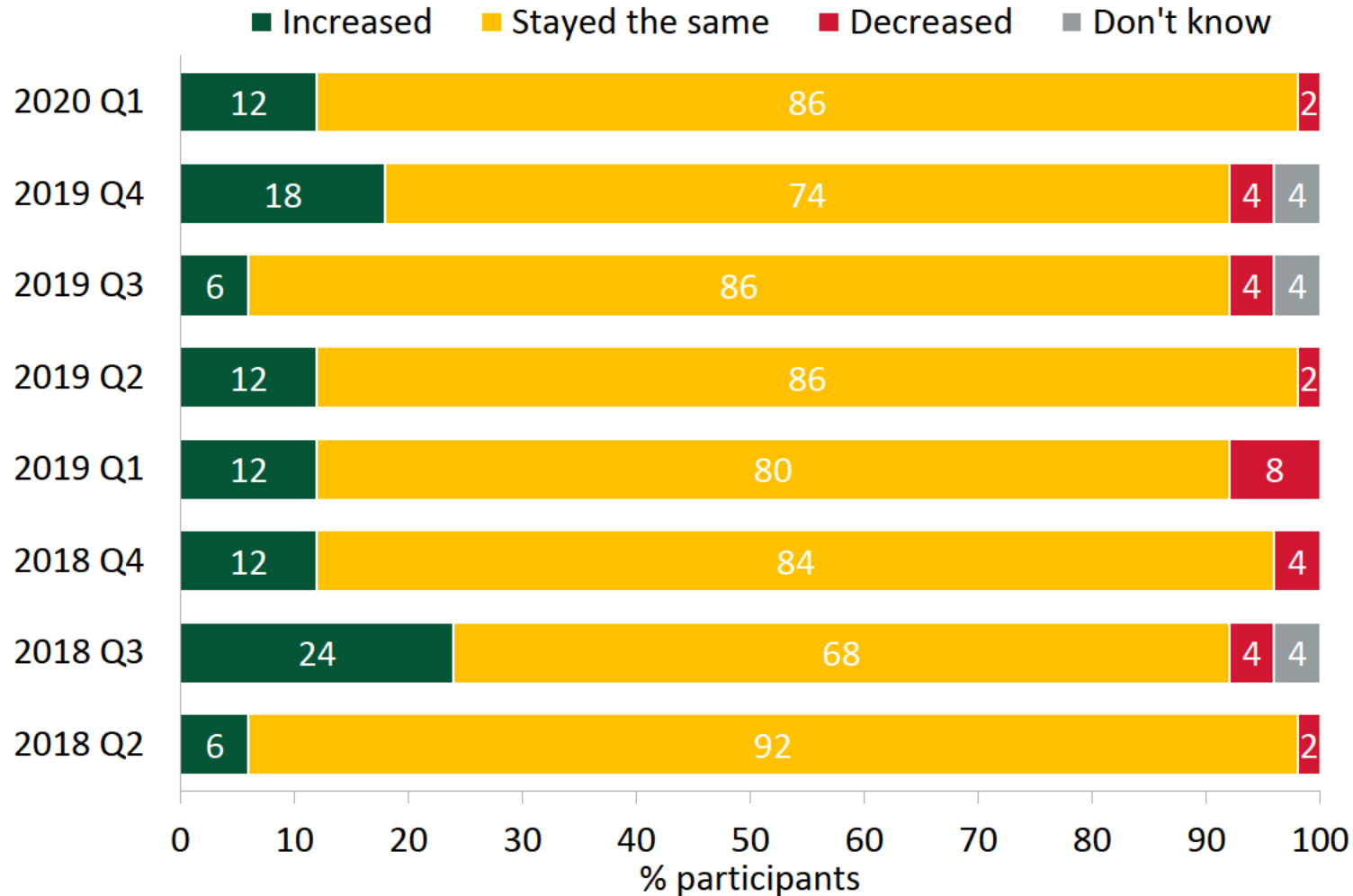


Nine in ten score at least 8/10 for overall satisfaction, the highest recorded score to date and significantly higher than most other quarters

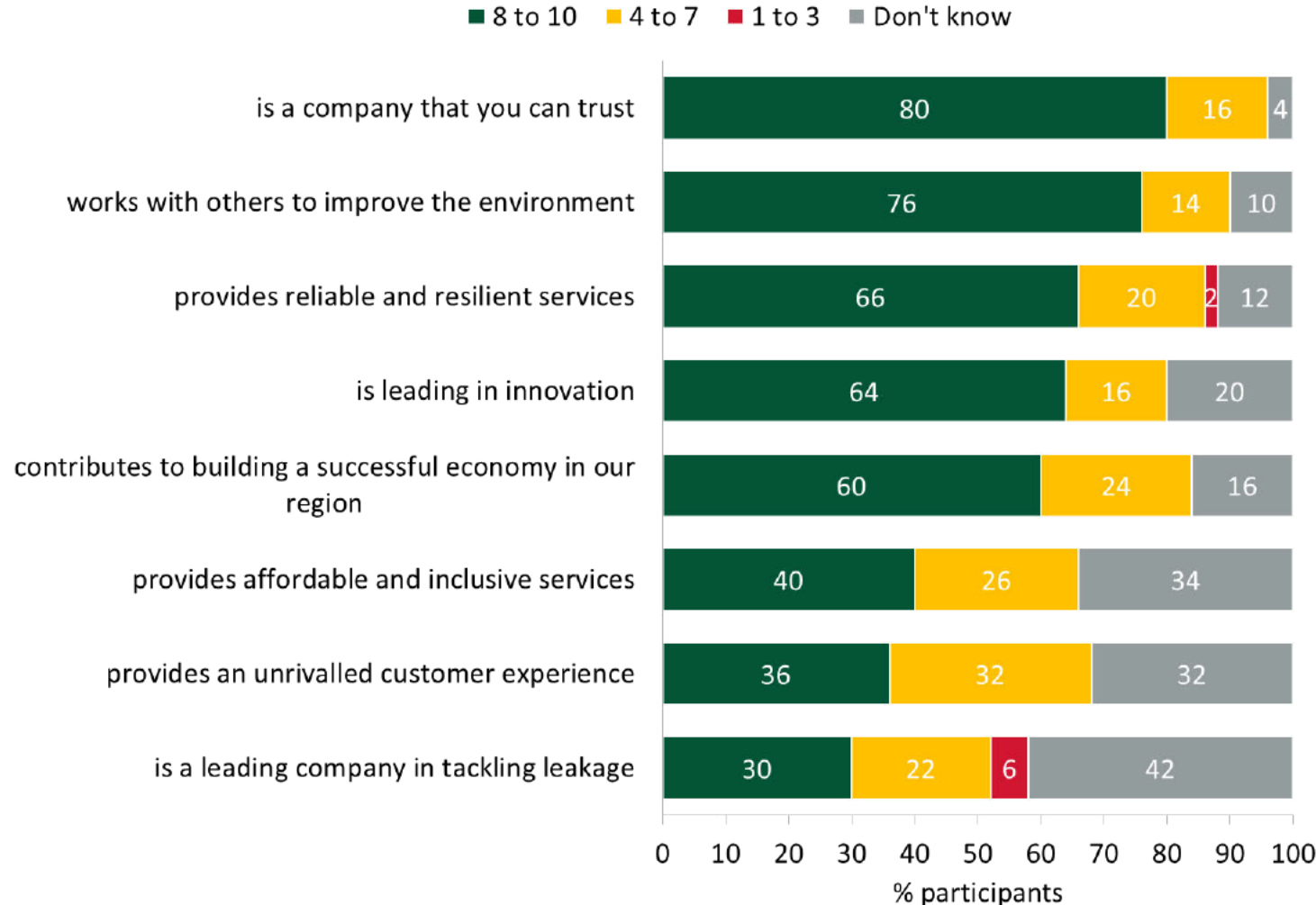


Overall Satisfaction: Mean scores			
	NW	ESW	NWG
2018 Quarter 2	8.23	8.1	8.18
2018 Quarter 3	8.54	8.33	8.49
2018 Quarter 4	8.21	N/A	8.28
2019 Quarter 1	8.27	8.58	8.39
2019 Quarter 2	8.17	8.15	8.16
2019 Quarter 3	8.39	7.69	8.21
2019 Quarter 4	8.4	8.44	8.41
2020 Quarter 1	9.11	8.14	8.84

Over 1 in 10 said their overall satisfaction had increased over the past year, slightly lower than Q4 (NS)



Four in five perceive NWG as a company you can trust



Mean scores are similar to previous quarters except for some areas where Q1 is significantly higher than previous quarters:

- *“provides an unrivalled customer experience”* (Q1: 7.68, Q3: 6.78, Q2: 6.68)
- *“leading in innovation”* (Q1: 8.33, Q4 6.9, Q2 7.17, Y3Q1: 7.51)
- *“is a company that you can trust”* (Q1: 8.63, Q3: 7.91)

Two in five trust NWG because they have no reason not to, and because they have a good working relationship



Comments on trust



Because like all monopoly utility providers there is always a conflict between the interest of shareholders and the interest of customers, they follow the interest of their shareholders even at the cost of relationships.

Because deal with Northumbrian Water a lot, they are normally true to the word and deliver what they say they will.

In the role that I'm doing, we have to trust our Local Resilience Forum Partners, and I've been in the role for 9 years and find them completely trustworthy.

Because in many respects they are a good company but I think sometimes you get the sense that you do not always hear warts and all, it is only the positive aspects.

Because I have, in a professional capacity, dealt with Northumbrian Water for a number of years and have never had any cause to doubt my trust in them at all. Their approach as staff and as a company to anything in the region is done with integrity.

Because from my experience and through dealing with their employees Northumbrian Water Group always try to do the right thing.

Because any dealings I have had with Northumbrian Water have always very professional and they are always proactive if we need information from them.

Conclusions



Conclusions



- NPS is 36 this quarter, which is a significant increase from Y3Q4 when the NPS was 3
 - Propensity to recommend NWG has significantly increased in Q1 (mean: 8.46) following the lowest mean score on record in the previous quarter (7.32)
- As in previous quarters, the main reason given for likelihood to recommend NWG was that there were no problems/happy with service
 - Good working relationship was significantly more likely to be mentioned this quarter (30%) than the previous quarter (10%)
- This quarter participants were significantly more likely to have had contact within the past three months (72%) in comparison to the previous quarter (28%)
 - One third had been contacted by email

Conclusions

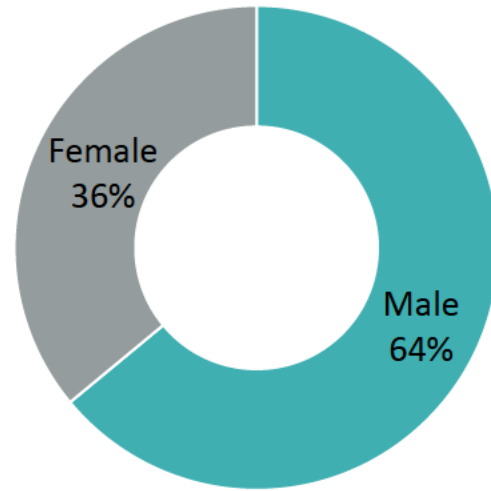
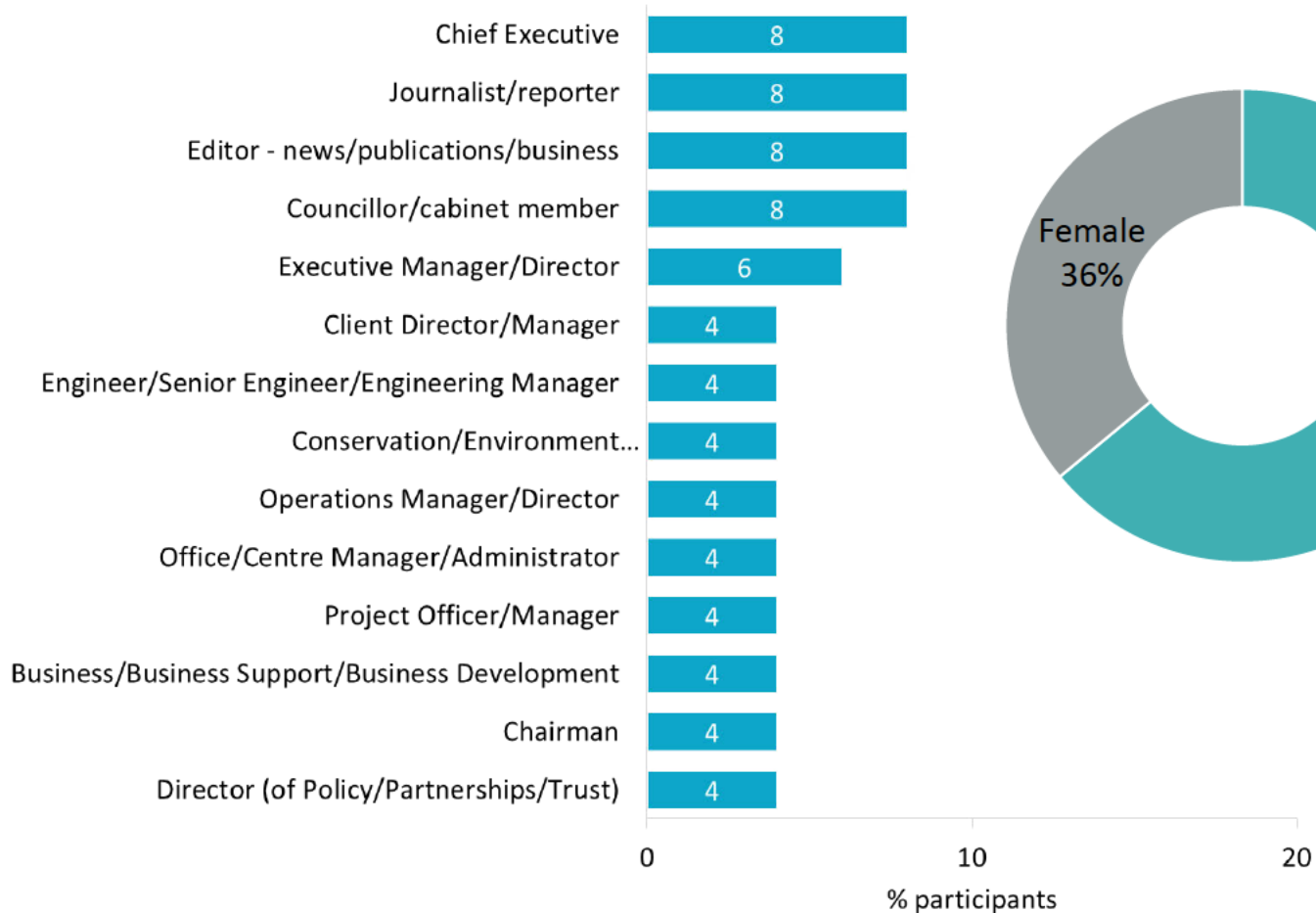


- Two in five scored 'Very satisfied' for satisfaction with their contact with NW/ESW, with nine in 10 stating the company provided them with all the information they need
- Email is the preferred means of receiving regular communication from NW/ESW, with the vast majority choosing it
- Overall satisfaction remains high with 90% scoring at least eight out of 10, significantly higher than most other quarters
- Nearly nine in 10 stated that their satisfaction has remained the same over the past year

Participant Classification



Participant classification



Participant/ organisation is based in	n
North	31
Essex	8
Suffolk	1
Other*	10
Total	50

*10 participants were provided with water and waste services by non-NWG companies. For analysis purposes, they were allocated to NW or E&SW according to the location of their supplier. Four were allocated to NW and

Thank you



Registered in London No. 2231083

Accent Marketing & Research Limited Registered Address: 30 City Road, London, EC1Y 2AB

Accent