



Yorkshire Water Channel Strategy

August 2022

Ali Sims, Research Director
asims@djsresearch.com

Matt Prince, Associate Director
mprince@djsresearch.com

Head office: 3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

+44 (0)1663 767 857
djsresearch.co.uk



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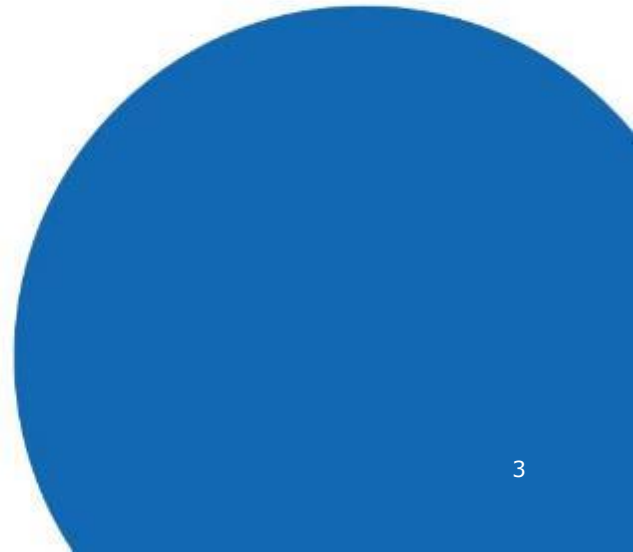
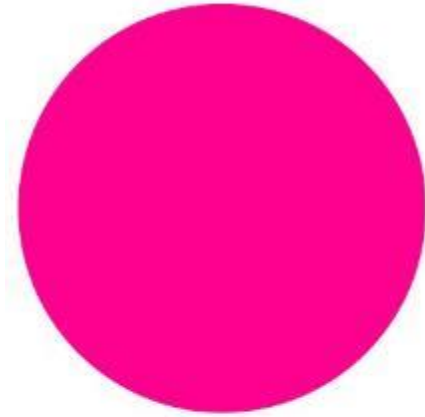




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Background and objectives





Background & objectives

In readiness for PR24, **Yorkshire Water are aiming to define the way in which services are** (and can be) **accessed by customers.**

Yorkshire Water's overarching **aim is to provide a customer channel strategy that ensures customers are able to engage with YW in a way that is most appropriate for their query.**

To aid this aim, DJS Research were commissioned to undertake a two-part project with customers to address the following objectives:

Key objectives:

Explore customer views on their ideal range of channel choices in a variety of scenarios

1

Explore perceptions of the current channels offered by YW

2

Understand how YW's existing channels compare with other companies and sectors, and benchmark current performance

3

Explore perceptions and preferences around digital and non-digital channels, and understand where and when digital channels might be preferable

4

Understand customer preferences in relation to efficiency and convenience, and whether this differs depending on the contact scenario

5

Explore perceptions around future usage expectations and needs

6

Refer findings back to Yorkshire Water's Needs State model

7





Methodology

Qualitative: mix of focus groups (face to face and online), and depth interviews with customers in vulnerable circumstances.

Quantitative: online and CAPI surveys with 776 residents across Yorkshire.

Overview:

- **Qualitative:** took place in July 2022. Six two-hour groups (5 online via Zoom/Teams, and 1 face to face), and 12 one-hour depth interviews over Zoom or telephone. Recruited using our team of face-to-face recruiters.
- **Quantitative:** conducted in July and August 2022. 55 door-to-door CAPI interviews completed with offline residents, and 721 interviews using an online panel with a representative sample of residents from across Yorkshire. 53 of the online interviews were with future bill payers.*

Group 1: 7 X ABC1, 25-45, mix of metered and unmetered. Not contacted YW in the last 12 months

Group 2: 5 X C2DE, 46+, mix of metered and unmetered. Not contacted YW in the last 12 months

Group 3: 7 X C2DE, 25-45, mix of metered and unmetered. Not contacted YW in the last 12 months

Group 4: 8 X ABC1, 46+, mix of metered and unmetered. Not contacted YW in the last 12 months (face to face)

Group 5: 7 X Future bill payers, 18-30, mix of SEG

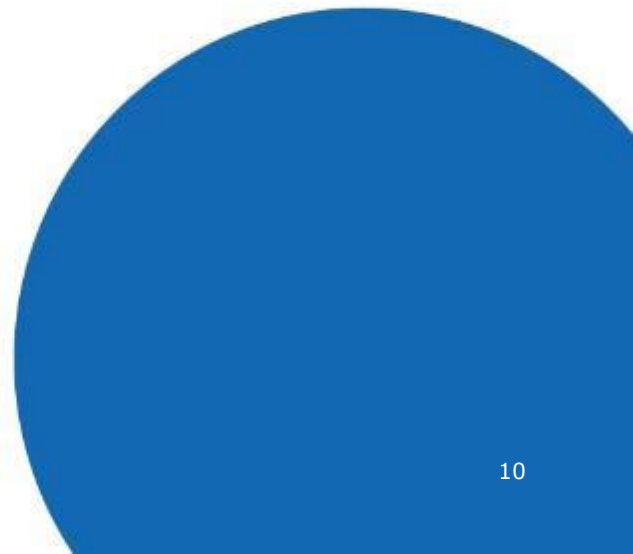
Group 6: 6 X Contactors (have contacted YW in the last 12 months – with a mix of reasons), mix of age, gender and SEG

Depths: 12 depths. Split by customers in different vulnerable circumstances (physical disability, mental health condition, chronic illness, financially vulnerable)

Quantitative: respondent profile shown on next slide

*We used external panel providers Panelbase and Cint to conduct the online surveys. More details about our use of online panels is available on page 76

Perceptions of Yorkshire Water



Words associated with YW are largely neutral

When asked what words they associate with YW, many customers are unsure, or offer relatively neutral words and phrases. For those who provide negative and/or positive words it tends to be focused on relatively recent experience (e.g. rising bills, seeing news about sewage discharge, or speaking to someone helpful and friendly about a query). For others, YW often (seems) to operate largely in the background.

Negative

"Expensive"

"Monopoly"

"Sewage
spills"

Neutral

"In the
background"

"Okay"

"Bills"

"Meets
expectations"

"Just there"

"Water"

Positive

"Best water"

"Friendly"

"Safe"

"Local"

"Helpful"

Future bill payers are most likely to think of YW as in the background; and question whether they have any choice in supplier.

Recent contactors tend to have a more positive outlook overall – with words such as "helpful" and "friendly" coming through strongly.

No difference in associations with YW between customers in vulnerable circumstances and other groups.

Customers have a limited view of what they *want* and *need* from YW

Beyond an uninterrupted service, with water that's safe to drink straight from the tap, many are unsure what they want and need from YW on an ongoing basis. For those that were able to provide an answer, it largely focused on bills or general day to day service, while communications / improved communications didn't really feature among the non-contactor groups.

Want from Yorkshire Water:

Cheaper bills	Leaks fixed	No sewage discharged into waterways
Info on how to save water	Readable meters	To be reachable / contactable (among contactor group)

In the main, **wants focused on bills, fixing leaks and stopping sewage discharge into waterways**. For a few though – especially those more conscious of rising household bills – info on how to save water and readable / smart meters were mentioned.

Need from Yorkshire Water:

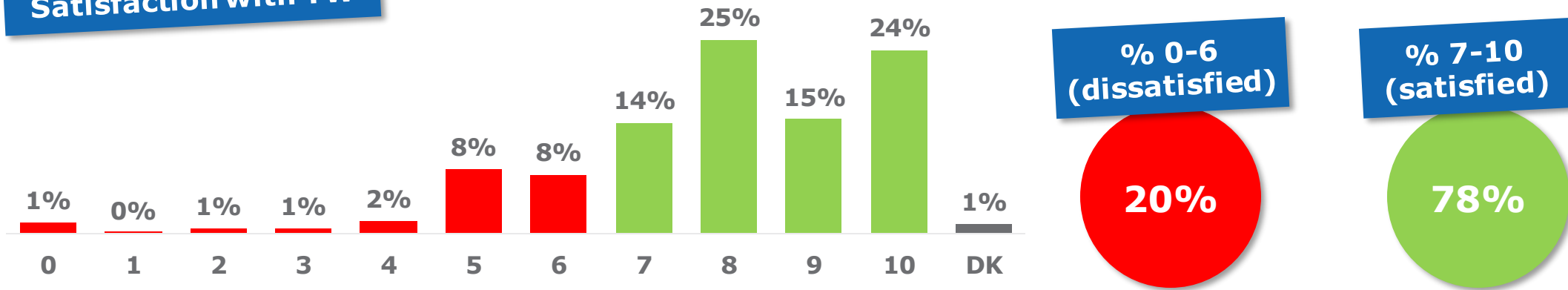
Clean water	Uninterrupted service	Honesty and transparency (lack of competition means YW need to be trusted)
Sewage removed from property		

Clean water, a reliable service and transparency and honesty were the **key needs** for customers of all groups.

Largely positive perceptions of YW

Satisfaction with YW is high, with almost four in five (78%) rating their satisfaction between 7 and 10 out of 10.

Satisfaction with YW



Satisfaction is lower among minority ethnic group respondents (67% rating of 7-10), than White British (80%).

Metered customers are **more likely to be satisfied than unmetered** customers (82% rating of 7-10 cf. 74%).

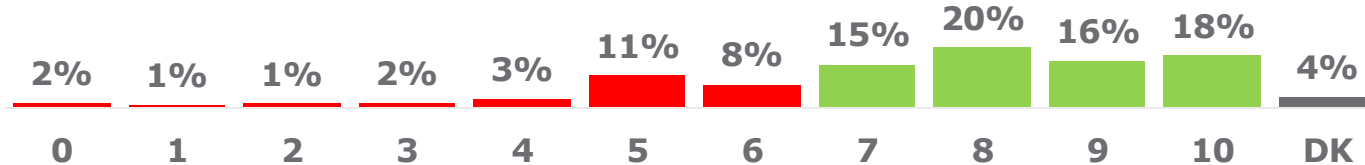
Those who manage all of their accounts online are more likely to be satisfied than those who are entirely offline and those who have a mix (87% cf. 75% & 7% respectively).

Those who are classed as financially vulnerable (agree that they worry about not being able to afford their water bill, and/or already can't afford their water bill) **are significantly less likely to be satisfied than those who are not classed as financially vulnerable** (69% cf. 83%).

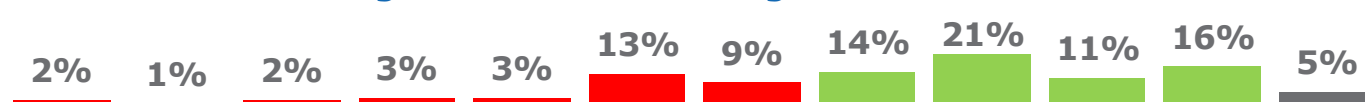
YW are considered trustworthy, but perceptions that YW cares are lower

Over two-thirds agree that YW are a company they can trust, and almost two thirds that YW are good at communicating with customers.

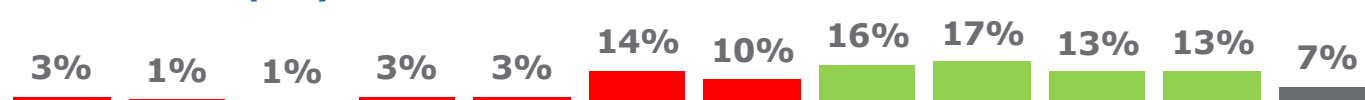
YW are a company I can trust



Yorkshire Water are good at communicating with customers



YW are a company that cares about its customers



% 0-6
(disagree)

27%

% 7-10
(agree)

69%

32%

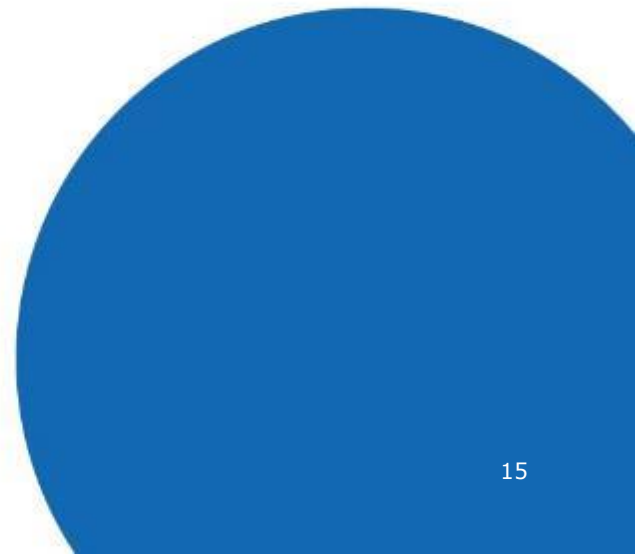
62%

34%

59%

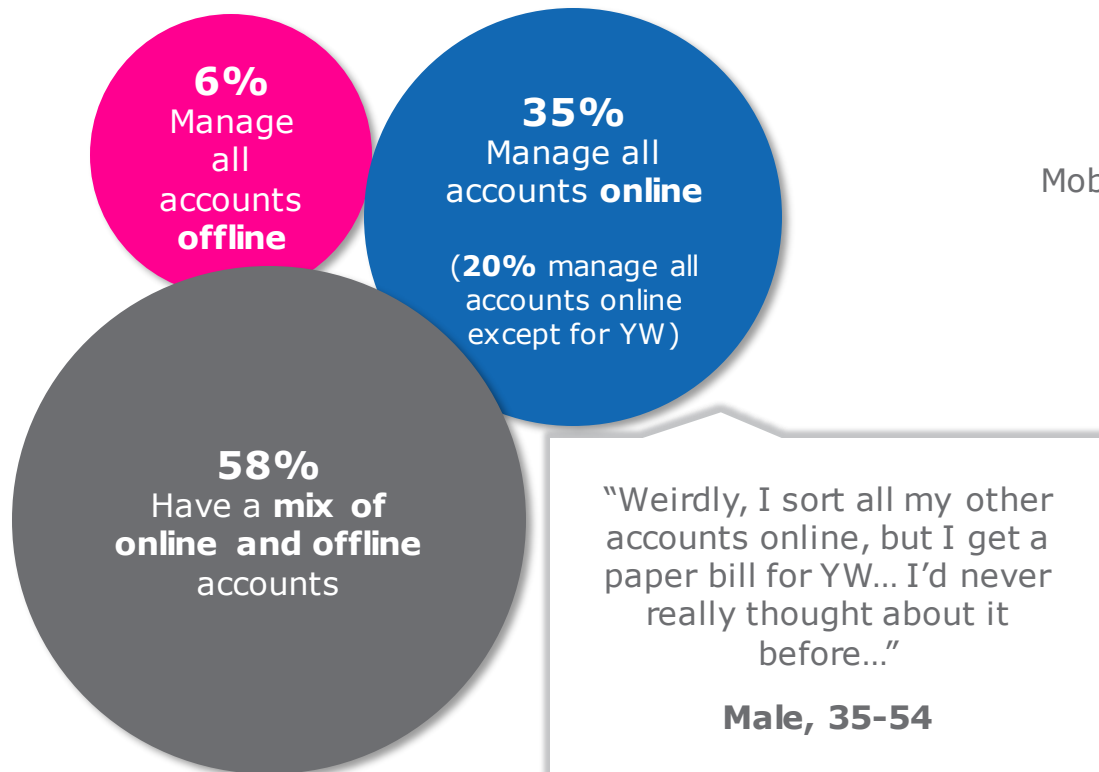
Customers who have a mix of online and offline accounts are less likely to agree YW are good at communicating with customers (58%, 7-10) than those who only have online accounts (68%) and those who only have offline (70%)

Managing household accounts

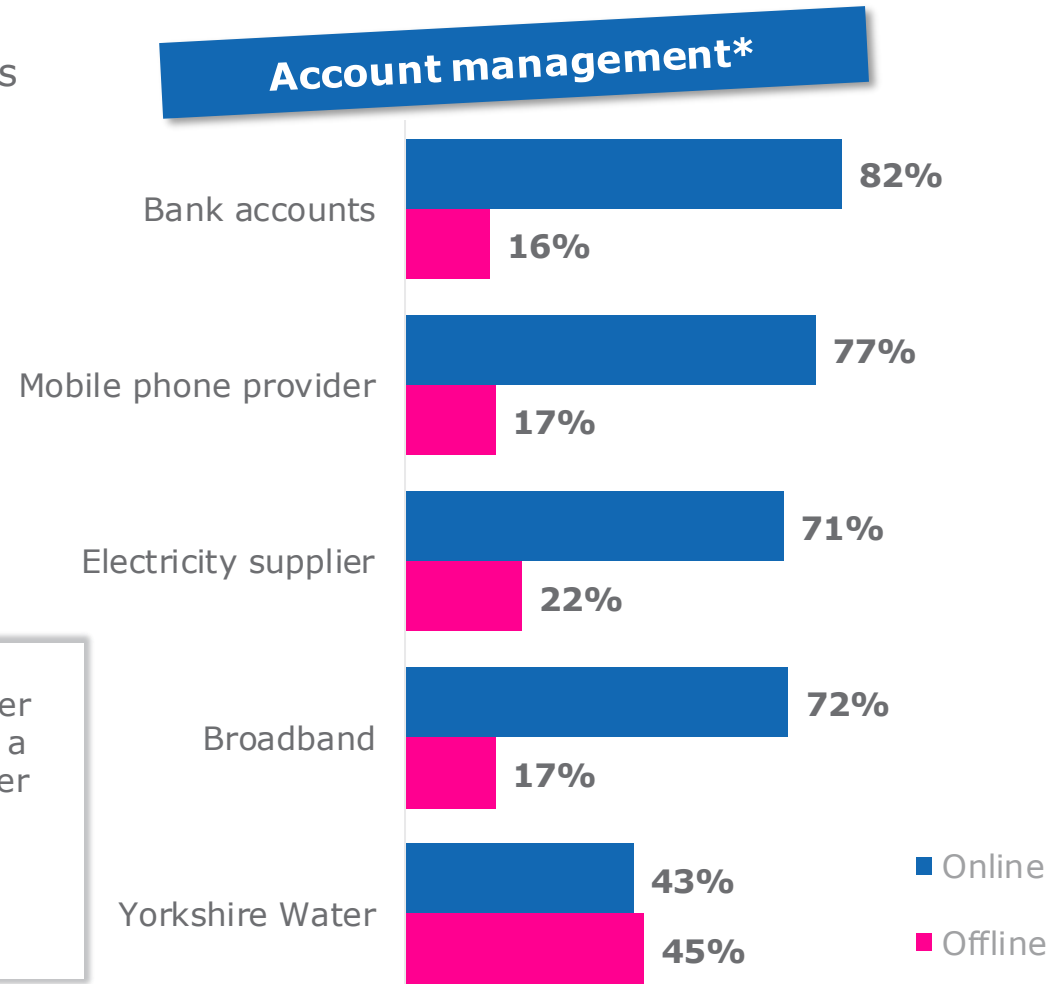


Less than half manage their YW account online

Just over a third manage all of their accounts online, while less than one in 10 manage all of their accounts offline. YW is the only account type where less than half manage online.



Base: all respondents (776). **Q01.** Thinking about companies or organisations where you have an ongoing account, how do you tend to manage or monitor your account(s)? Please select the main way this is done.



*Where %s per account don't equal 100% the remainder either don't know or don't have that type of account.

Those with no formal qualifications and a household income under £20,000 are more likely to manage all their accounts offline

Profile of customers who manage all accounts offline

No formal qualifications

25%

Household income
<£20,000

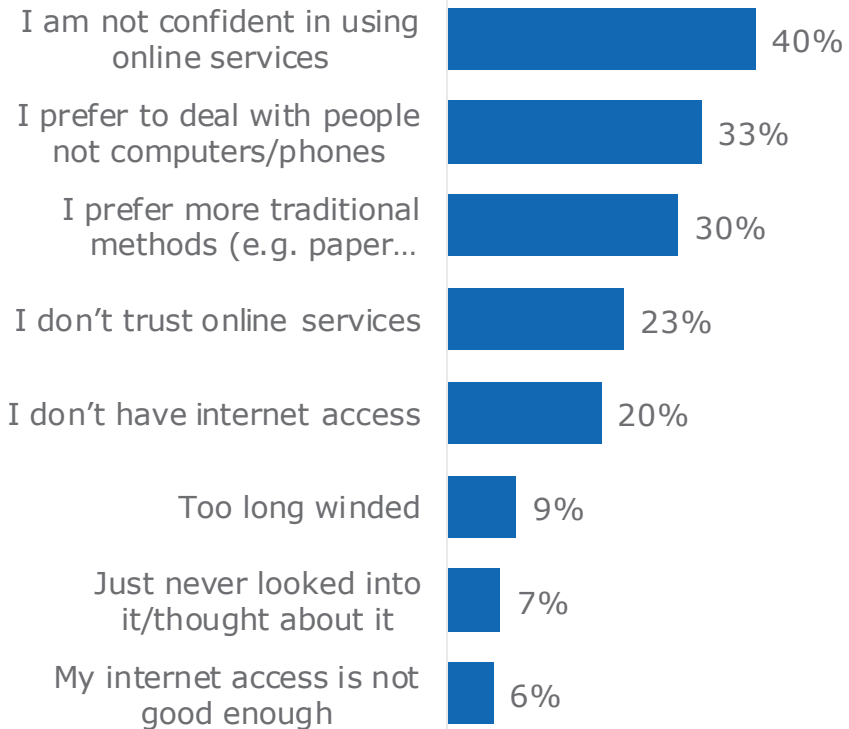
11%

East Riding

11%

Don't manage accounts online,
total: **6%**

Reason(s) for not managing accounts online



Base: all respondents who don't manage any accounts online (78).
Q02. Why don't you manage any of your services online?

Most would be in favour of paperless billing for their YW account

Although most are broadly in favour of paperless billing (should it be introduced), a number of pros and cons are mentioned...

Pros

More in line with how other accounts are managed



Better for the environment



Easier to find (especially with an online account)



Cons

Paper bills useful for ID purposes



Unsuitable for some audiences (elderly, offline etc.)



More easily missed



Overall, **most** are surprised that YW continue to offer paper bills as standard. The general consensus is that **paperless would be fine for most, but** that **provision** should be **made** for those for whom it would be **unsuitable**.

A concern among some is that paperless bills could be missed. To that end, some would like to see YW introduce notifications (text, email, or if using an app, push) to inform customers when bills have been 'sent'.

"I'd probably prefer paperless to be honest. Everything else is now, it'd just get added to the list... but it's the only bill that is still paper, so it's useful if you ever need proof of address or supporting ID"

Male, 35-54

Most would be happy for the option of speaking to someone for payments to be removed

In the main, customers would be okay with removing the option of speaking to someone just to make a payment, but there are concerns it could be confusing for some – and it's felt there should be some safeguarding in place:

Questions about removing option to speak to someone for payments...

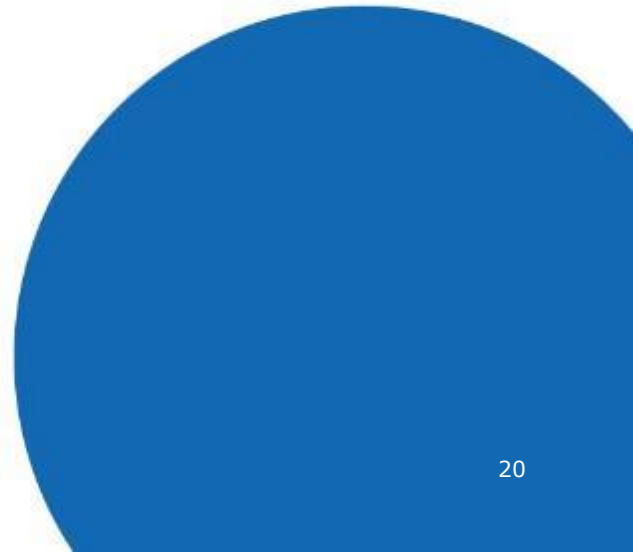
- **How is it signposted?** Customers want to know how the change will be signposted, to ensure those who have queries aren't left confused
- **What proportion of customers pay in this way?** Most assume the number of customers who pay in this way is low, but would like to know what the provision would be for those customers (and what lead in time there would be for the change)

For those who do pay bills over the phone, there is a general preference for the system being automated, as it's felt to be more secure than giving bank / card details out to someone over the phone.

"It seems fine to me... how many people do that now anyway? It can't be loads? As long as there's a way for them to do it other than the phone if that doesn't suit them, then it's okay by me."

"To be quite honest, I'd prefer that anyway. I don't want to give my bank details out to someone... I don't know them and once they have the numbers they can do anything with it really – they'd have my name and address and everything but my inside leg measurement!"

Recent contact with Yorkshire Water



Most contacts were considered general queries

Among the one in five who have contacted YW in the last 12 months, the majority were contacting about what they considered a general enquiry.

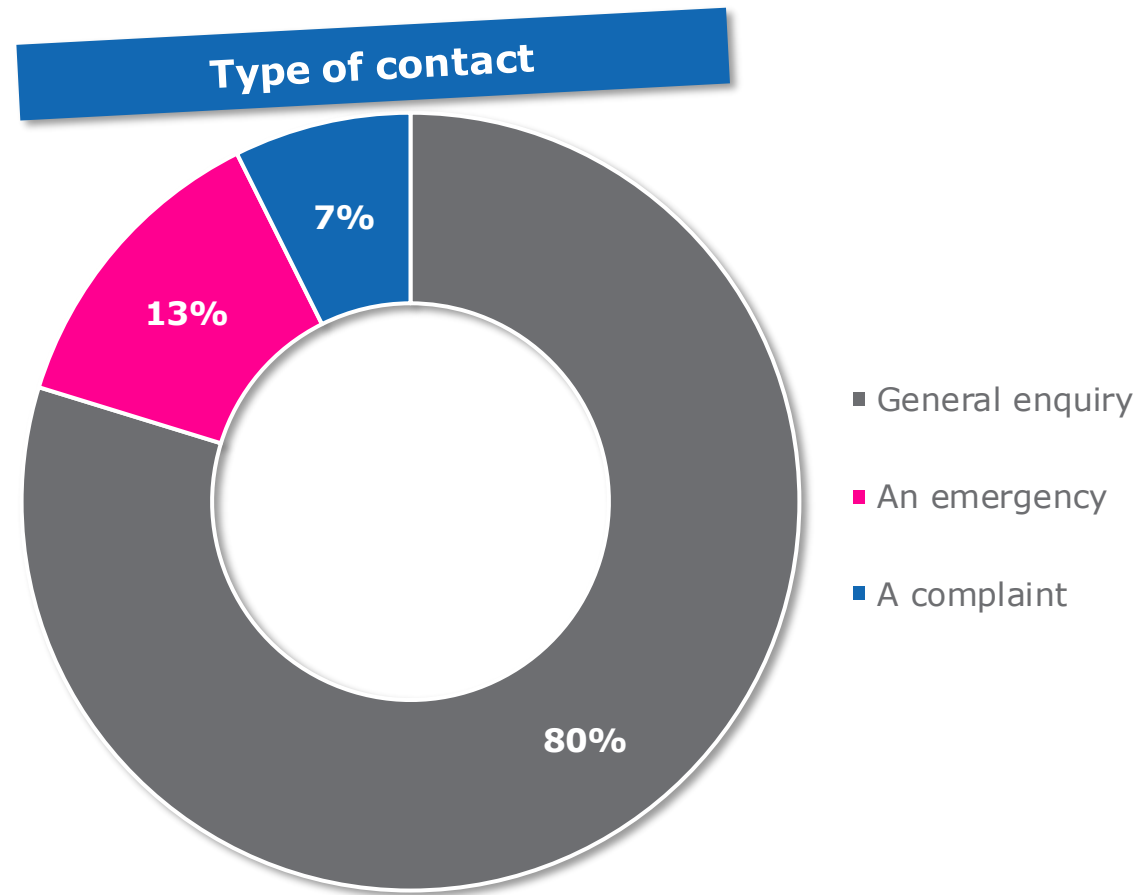


Most likely to have contacted YW:

- 18-34 (34%)
- In receipt of benefits (30%)

Least likely to have contacted YW:

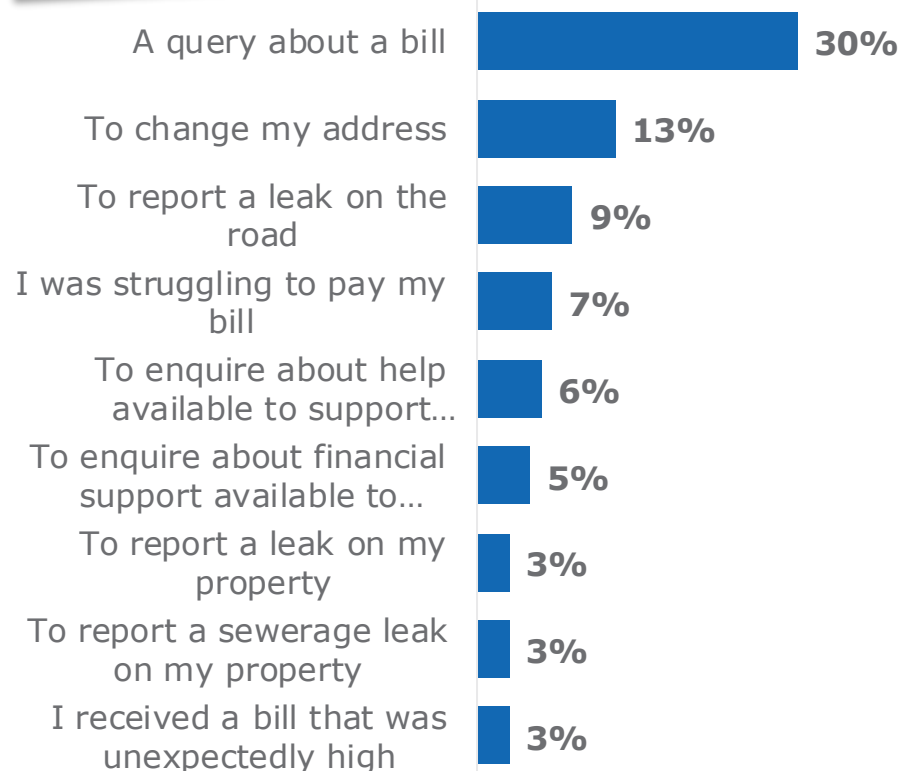
- All accounts managed offline (16%)
- 55+ (14%)



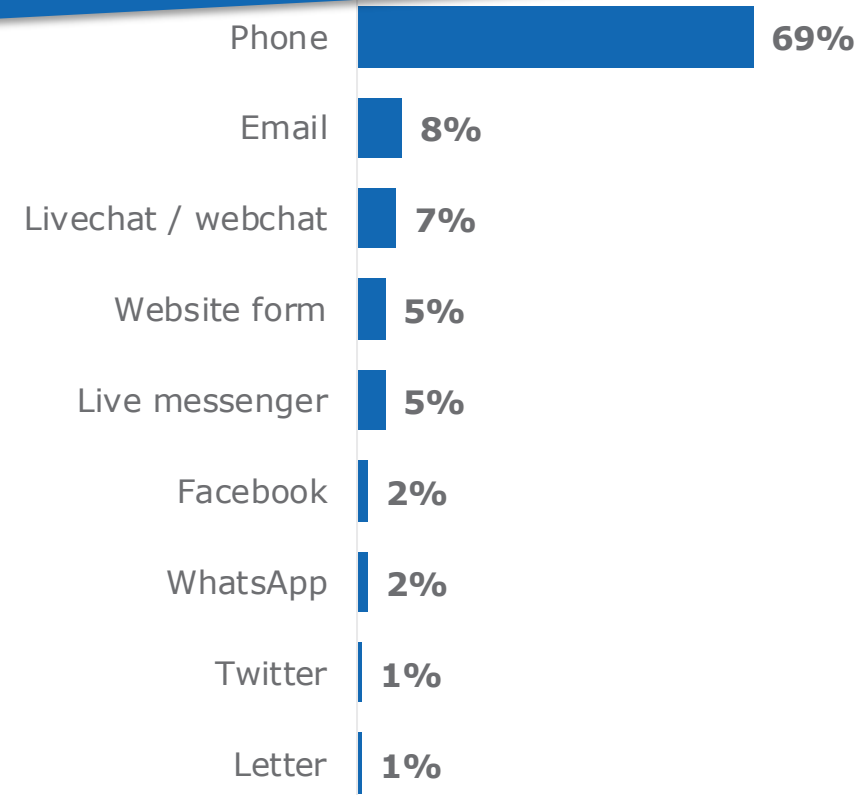
Customers most often contact about a bill query, and usually contact by phone

18-34s are least likely to have used the phone for their query (52%), while those who manage all of their accounts online are only slightly less likely to have used the phone to contact (64%)

Reason for contact

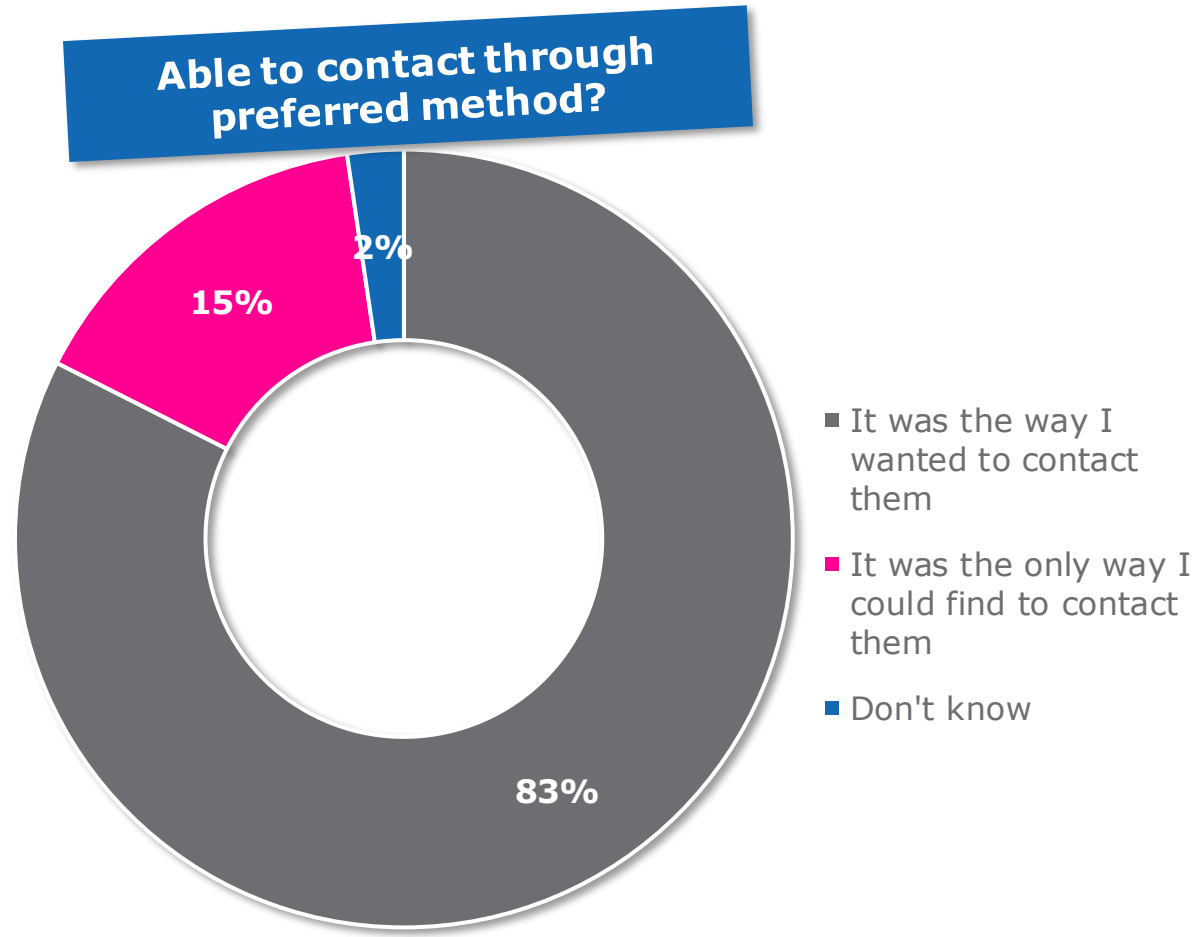


Method of contact



Base: all who had contacted YW (179). **Q07.** Which of the following best describes why you contacted Yorkshire Water? / **Q08.** And, how did you contact them about this issue?

Most were able to contact YW through a channel that suited them



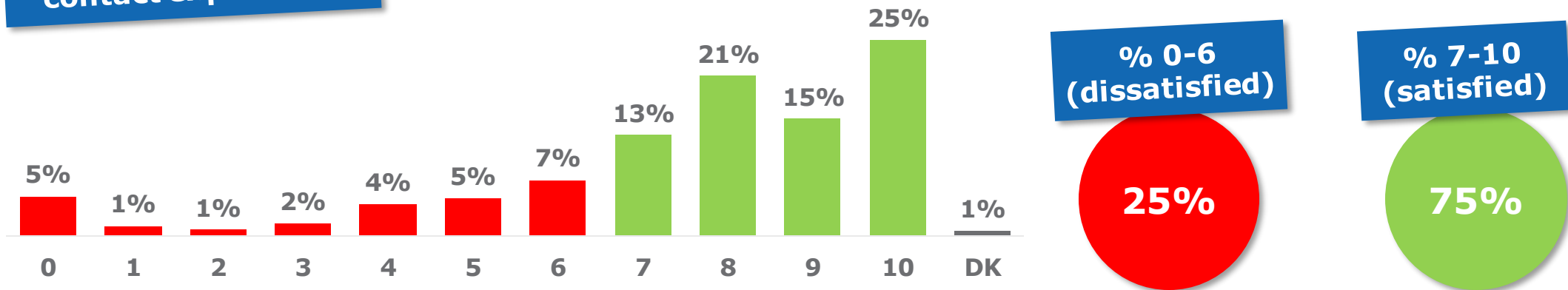
Just 67% of DEs say that they contacted in the way they wanted (only just over half, 55%, contacted by phone – 18% by email)

84% who contacted by phone say it was the way they wanted to contact.

Base: all who had contacted YW (179). **Q09.** Would you say the way in which you contacted them was: the way in which you wanted to contact them, or the only way you could find to contact them in that scenario?

Satisfaction with the contact experience is largely positive

Satisfaction with contact experience



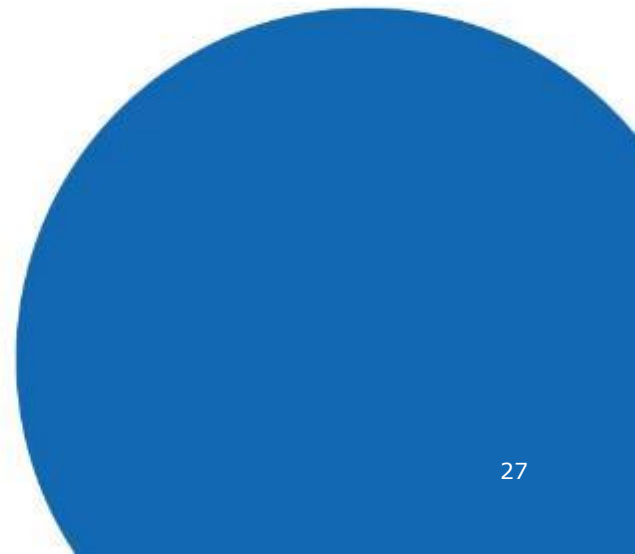
81% of those who contacted in the way they wanted rate their contact experience between 7 and 10 out of 10. By contrast, 44% of those who contacted in the only way they could find* rate their experience between 7 and 10 out of 10.

Just 59% of DEs rate their satisfaction between 7 and 10 out of 10.

*Caution: low base size (<30)

Base: all who had contacted YW (179). **Q10.** Overall, how satisfied or dissatisfied on a scale of 0-10 are you with the service you received from Yorkshire Water when you contacted them?

Channel expectations



In general, contact preferences are driven by a transactional vs. personal calculation

Transactional

Where customers are faced with a (largely) **transactional contact**, they are **more likely to choose an online option** where available. **However, there are a number of potential tipping points** that can shift a transaction to personal, e.g.

A **quote for insurance might start out as transactional**, but if the premium is high or the details don't look right it **can shift to personal**.

Booking a table at a restaurant would **usually be transactional**, but if booking for a **special occasion**, is **more likely to become personal**.

"[Insurance quote] I'd usually look online first... but then I'd probably call up my provider to see what they could do for me if I found a cheaper quote."

"Booking anything I'd go online, but if I can't find what I need I'll start ringing!"

Personal

When faced with a personal query (or something that has a personal effect on them), they are more likely to begin with an option that allows contact with a person, but once in hand, they are generally happy for it to shift to transactional, e.g.

If finding that bins have not been collected, most would **want to** call to speak to someone. However, **once the initial contact has been handled, additional contacts** about rescheduled collection times etc. **could move to** being considered **transactional**, where other methods (text, email etc. would suffice).

"I'd want to speak to somebody about it... it'd probably be getting discussed in the community WhatsApp as well though, so it'd be whoever called first... after that you just want to know it's getting sorted.."

In addition, personal incidents tend to be handled differently than collective incidents

When discussing channel preferences in different scenarios, reactions and actions differ between incidents that are personal to them, compared to collective incidents, e.g.

Personal

If an expected parcel delivery had not arrived when expected / scheduled, customers would try to contact the firm in question – ideally by phone, but if not available (easily findable), would switch to webchat or possibly social media to get an update.

Collective

If a customer found that there was no running water when they turned the tap on, they would look to the community first to see if it was a collective or isolated incident. They would then update and work as a group to get in touch with YW to get updates. Updates would then be shared among the group for others to be kept informed.

“If I’ve not got something I’m expecting my first instinct is to call. A lot of the time now though, you can’t find phone numbers for companies... so it’d probably be a webchat... but that can be variable and you never know if you’re speaking to someone, or if you’re their priority. If that doesn’t work it’s straight to shaming them on Twitter or Facebook.”

Female, 35-54

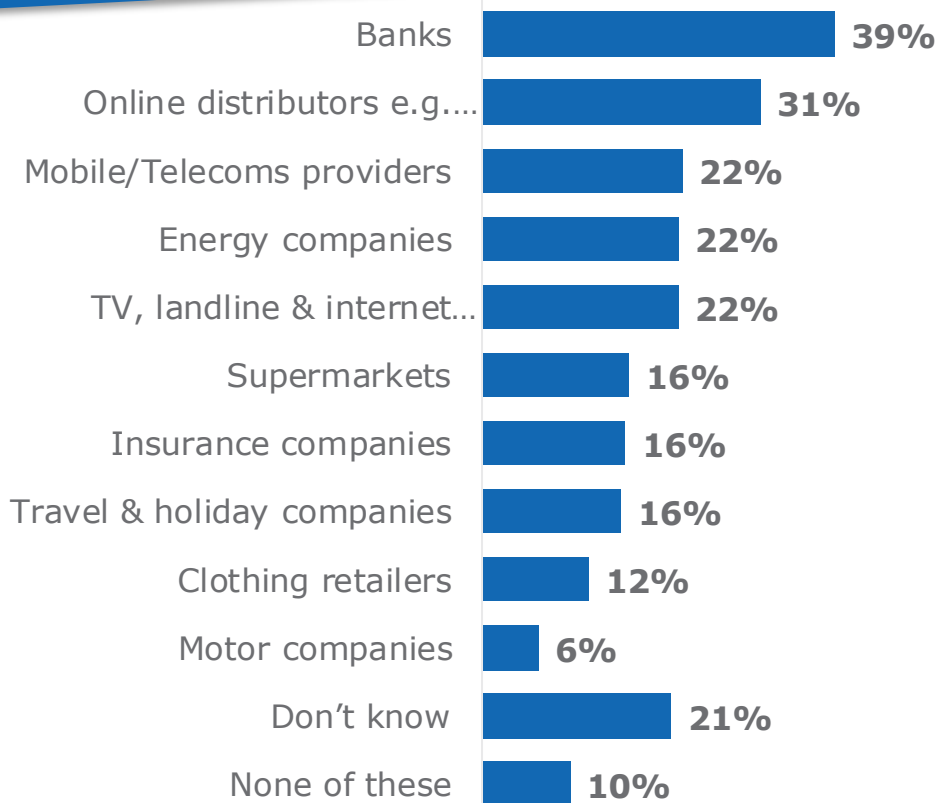
“If it’s a powercut or the water’s off, the WhatsApp or the Facebook group start buzzing straight away... one way or another you’ll soon know about it, and someone will be looking for answers!”

Male, 35-54

Banks and online distributors are generally thought to offer a good digital customer service

Perceived speed and efficiency are the main drivers of being seen to have good digital customer service – this is influenced, in part, through clear and easy to navigate online platforms / systems.

Offer good digital customer service...



Banks are seen as offering a particularly good digital service, because of... speed and efficiency (through apps and online banking); 24 hour contact online or via phone if needed; have a number of different ways to contact (through apps / online platforms, phone and social media)

Online distributors are seen as offering a particularly good digital service, because of... speed of service; consistent updates (through apps or text message); simplicity of access (apps and websites easy to use and navigate)

Base: all respondents (776). **Q30.** Which types of companies do you believe are known for offering a particularly good digital customer service? / **Q030b.** What is it about the service that these types of companies provide that is particularly good?

Perceptions of good channel options are driven by optimisation and efficiency

Customers tend to have positive perceptions of a company's contact channels when they provide options that make life easier for the customer (optimisation), or when the channel clearly aids speed / efficiency

Currys: utilising the optimal channel for the contact

"For me **Currys** is really good. They do a web chat which is a video call which isn't like any other companies I deal with. You can talk to someone in store who can show you the item and talk through it which I think is very advanced compared to others."

Make use of tech for a suitable purpose (not just for the sake of it)

Feels advanced / different

Amazon: resolving issues quickly / efficiently

"You can't beat Amazon, as soon as you get on to them [via webchat] they work to get it resolved as quickly as possible... Webchat doesn't always work for all companies, but Amazon do it really well."

Keep channels options simple (even if not preferred by the customer), **but deliver quick results**

Quick / efficient service the expected norm

Monzo: efficiency and continuity

"I had a good situation with Monzo, it was all webchat, I had a point of contact, I could contact him, he sent me updates through the app to say we're still dealing with it."

Utilising online contact channels, but in a personalised way

Efficient and easy to keep up to date with action / progress

Perceptions of poor channel options are driven by slow and confusing processes

Ticketmaster: lack of contact options and lack of response

"Absolutely the worst load of people I've had to deal with. The only way you can contact them these days is through Twitter. It took countless messages, back and forth. They've disbanded the telephone centre. After 2 hours of dealing with them it made me want to take up arms, I was that annoyed."

Lack of options for contact, and contact options that are unsuited to the query

Lack of speed and ease

GP: confusing and potentially unfair systems

"I hate to say it, but it's my GP surgery. They have an online booking system now, it shows there's no appointments for a month. You're not supposed to call, but if you do call and get through at the right time, you'll be having an appointment the same day."

Channels that aren't synced – with one channel providing better / preferential service over another

Systems are confusing. Not sure what should be online, what should be phone

Aviva: difficult to get through and slow response times

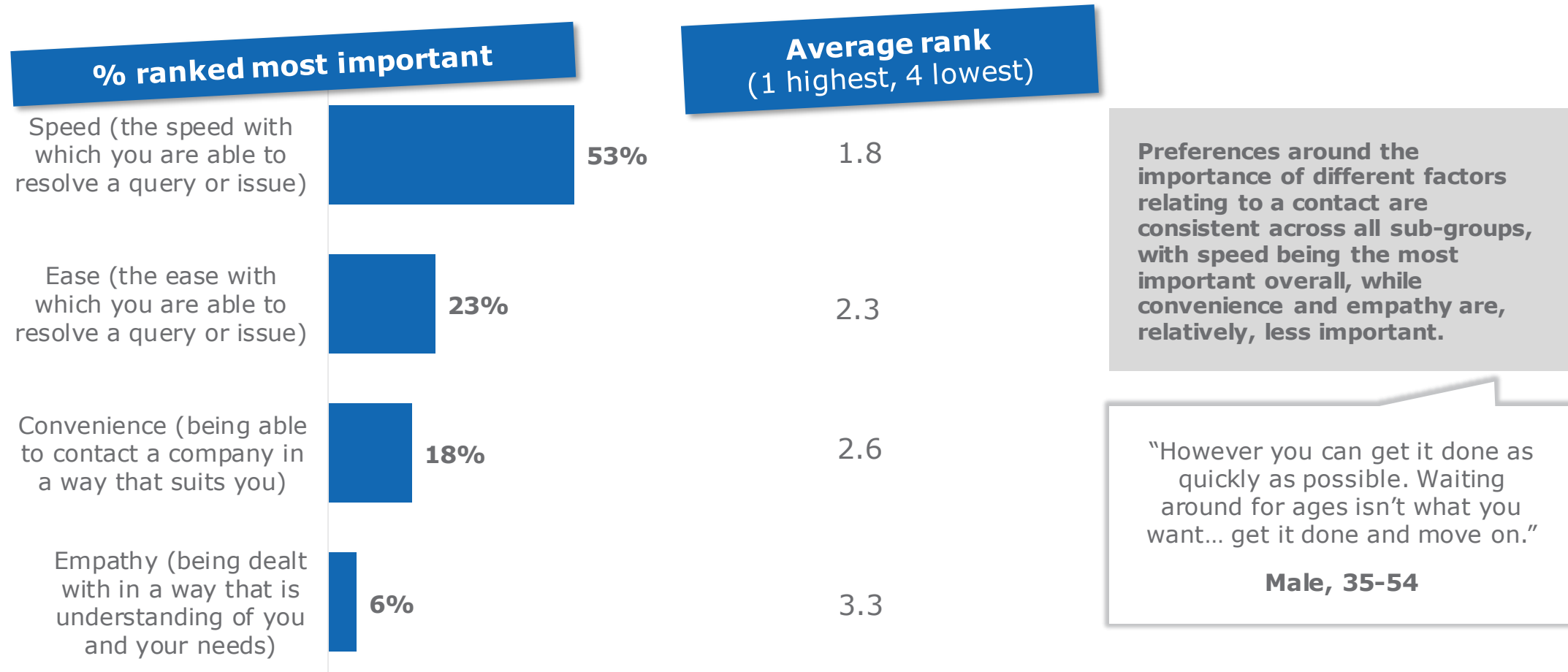
"I needed to make a small claim through Aviva from my home insurance. I tried to call, but had a massive wait, so then emailed, they took ages to get back to me, and then I had to explain it to loads of different people."

No consistency of channel usage / channels didn't 'talk' to each other to improve customer's experience

Long wait times, with few / no updates in between

Speed is the most important factor when contacting a company, followed by ease

In the quantitative research, when asked to rank the importance of different factors related to contacts, speed and ease are the most important overall.



Base: all respondents (776). **Q24.** Below are a number of different things people have said are important to them when contacting a company about a query or an issue. Looking at the list below, please rank them from the most important to least important to you

Although speed is seen as most important, empathy can be the difference between a positive or negative experience

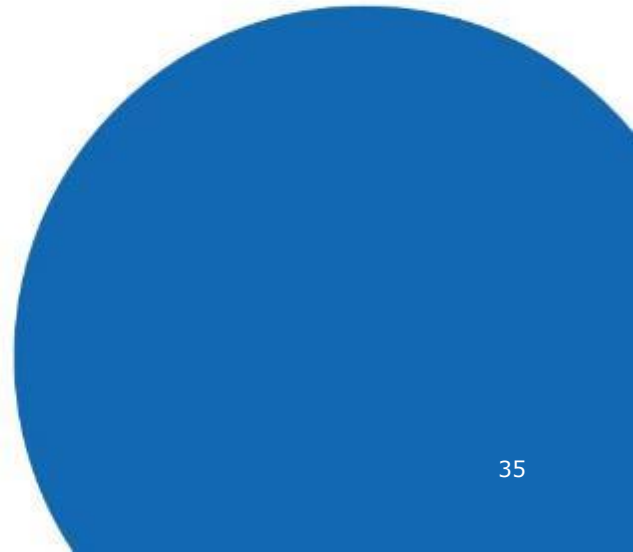
Although empathy isn't the top priority for customers when contacting a company, it can be the difference between a positive and negative experience overall.

While speed and ease are the elements that set the initial tone, convenience and particularly empathy are the factors that can be most important if the initial contact hasn't resulted in a resolution, or if the initial reason for contact is something the contactor is particularly concerned or unhappy about.

"[Contacting YW to get a water meter taken out, and felt the initial sell on the meter was too hard, which left a sour taste] 'I think it needs to be more evidenced why it will save me money, so this was definitely a phone call to be made and I got through pretty quickly otherwise I'd have had an embolism or something and have pegged out on the call! As it happens, the person I spoke to was absolutely brilliant, in another life they must have been a hostage negotiator as they brought me back down to earth, calmed me down, talked me through it and by the end I was in a good place again so I've genuinely got very good things to say about Yorkshire Water.'

Female, 35-54

Contacting Yorkshire **Water:** awareness and understanding of contact scenarios



Most are aware of the main reasons why they might need to contact YW

Customers are broadly aware of the reasons they might need to contact YW, and very quickly an urgent vs. non-urgent list is created...

Urgent	Non-urgent
Water leak on property*	General bill query
Sewerage leak on property*	Request a meter
Struggling to pay / high bill	Change of address
Supply interruption	Water saving advice

Water or sewerage leak away from the property (considered between urgent and non-urgent)

Bill paying customers have an intuitive sense of what they might need to contact Yorkshire Water about, and almost automatically assign it an urgent or non-urgent label.

*In a number of cases, bill-payers would consider water or sewerage leaks on the property as urgent, but potentially not a matter for YW, and would be more likely to contact a plumber or drainage company. Future bill-payers though are largely unsure of what they would do in either scenario.

“With a water or sewerage leak, unless it’s a mains drain or something under your garden that’s gone, you’d probably contact DynoRod rather than YW”

Male, 35-54

Customer journey mapping: urgent vs. non-urgent contacts

In the groups participants were asked to map an ideal journey in a given contact scenario (high bill, struggling to pay, supply interruption, sewer blockage, requesting a meter or reporting an obstruction), **detailing how they would want to contact, what they would want from YW, and how they would like the follow up to be handled.**

Rather than revealing distinct and varied journeys per contact scenario, in the main, the ideal journey was defined on an urgent vs. non-urgent basis – with different wants, needs and expectations attached to each type of scenario.

The following slides detail the different ideal journey in an urgent (supply interruption, sewer blockage), and a non-urgent scenario (requesting a meter, reporting an obstruction). Depending on the individual, a high bill and struggling to pay could be seen as either urgent or non-urgent – but the general consensus is that even if the customer doesn't consider it an urgent contact, YW should.

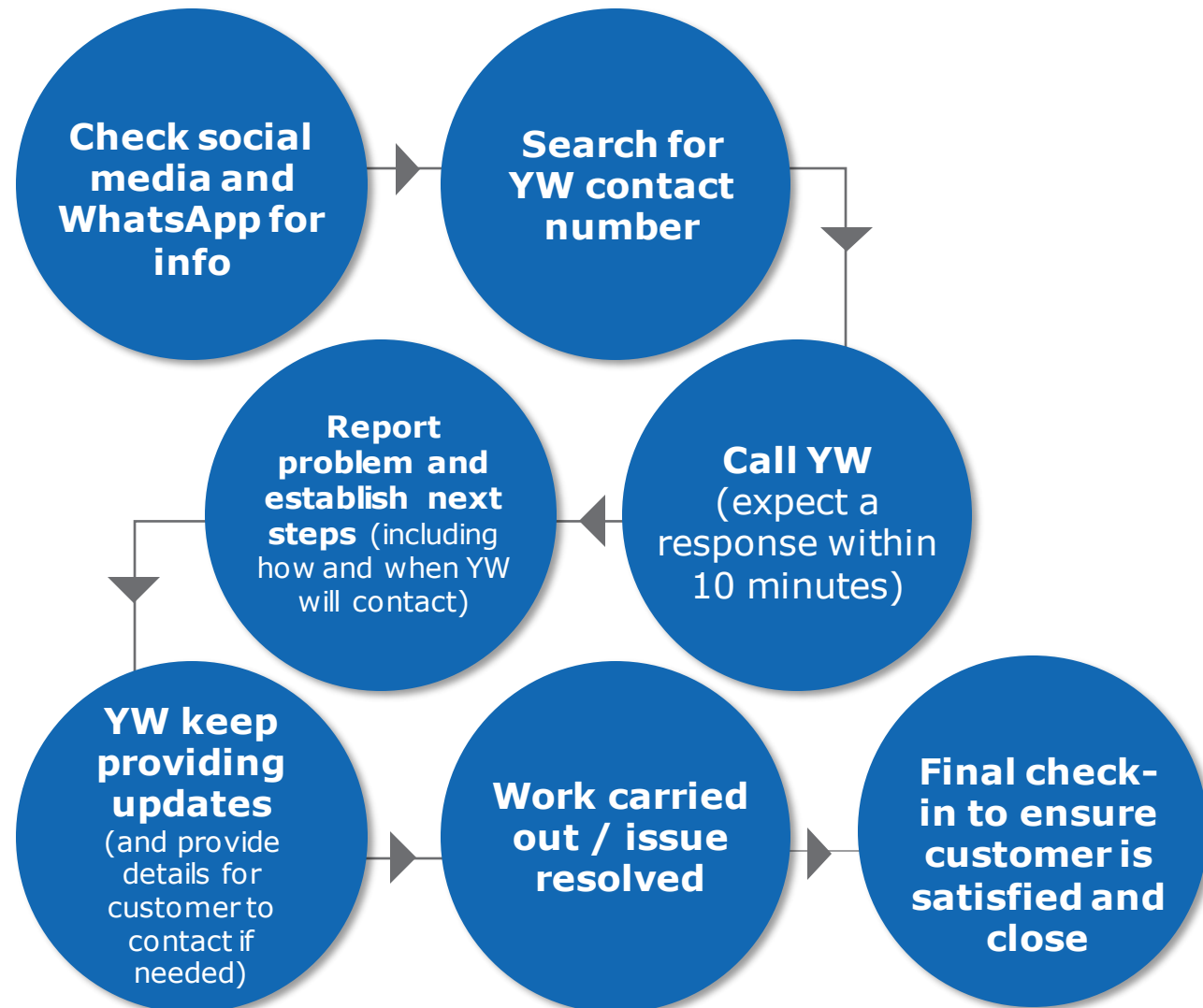
Urgent contacts demand quick response times, and calm and factual follow-up

The journey

- Most often, customers will start the journey online / digitally – either checking to see if neighbours have had a similar issue, and/or looking online for YW's contact number;
- The majority would then call YW to report the problem;
- Customers then want YW to keep them updated. The channel for updates is not usually important as long as it's communicated, and the customer has a way of getting back in touch if needed;
- Updates provided and work carried out / issue resolved;
- Final check to ensure it's been resolved to the customer's satisfaction.

The expectation

- Customers expect to be able to speak to someone within 10 minutes or so;
- Once initial contact is made, expect clear guidance on how the rest of the journey will be handled (transfer from customer leading to YW leading);
- Expect (relatively) regular updates and check-ins, and to be consulted to ensure matter has been properly resolved.



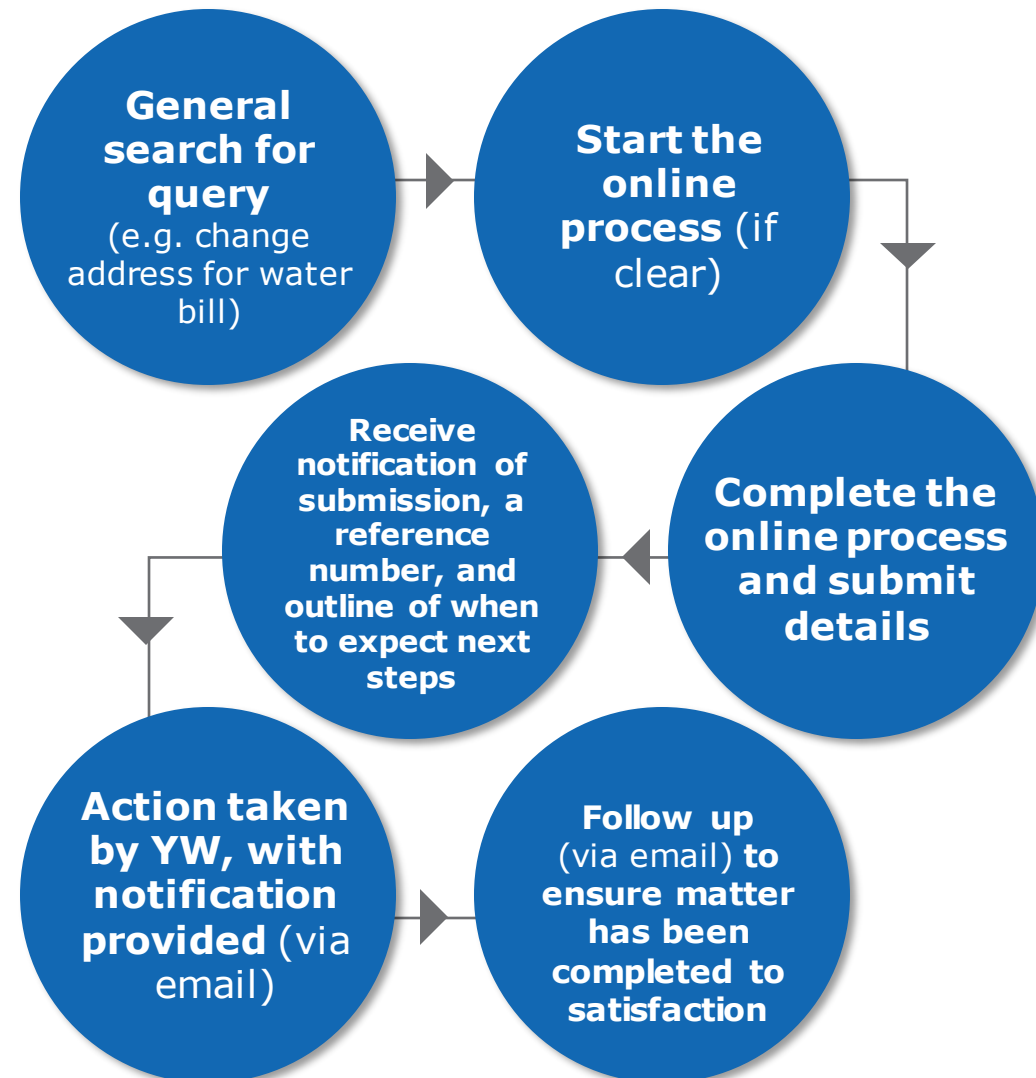
Non-urgent contacts demand clarity and simplicity in the process

The journey

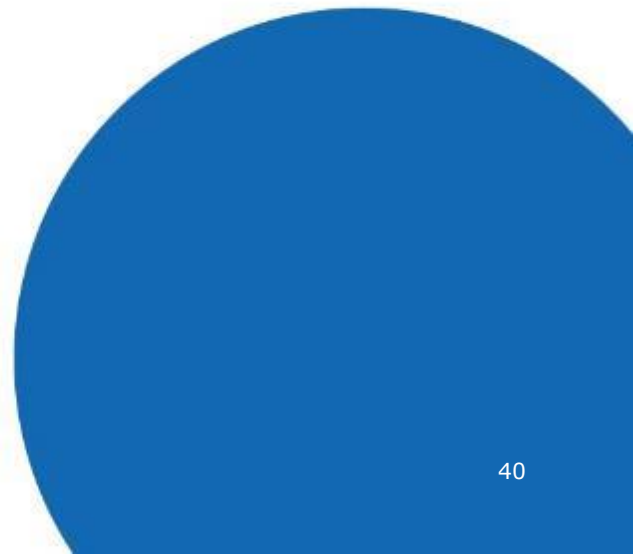
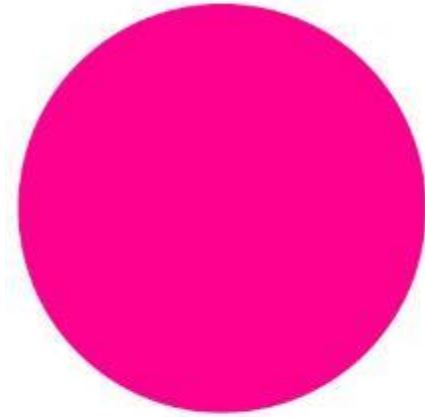
- Most likely to start with a general online search using terms to filter their results. Most would use a search engine to find what they wanted, rather than going straight to the YW website;
- (Assuming technological capability) Would attempt an online resolution first of all, and happy to be directed to a webform etc. if appropriate;
 - The exception here is for billing enquiries, where many would still prefer to speak to someone.
- If online resolution is clear and simple, will continue and complete (if not would revert to phone);
- A notification that the query has been submitted and a reference number provided (if online);
- Follow up / resolution within 48 hours

The expectation

- Customers expect to be directed to the right place
- Expect to find clear, simple and dedicated processes (e.g. dedicated process for address change vs. request a meter);
- Updates via email, and notification of next steps

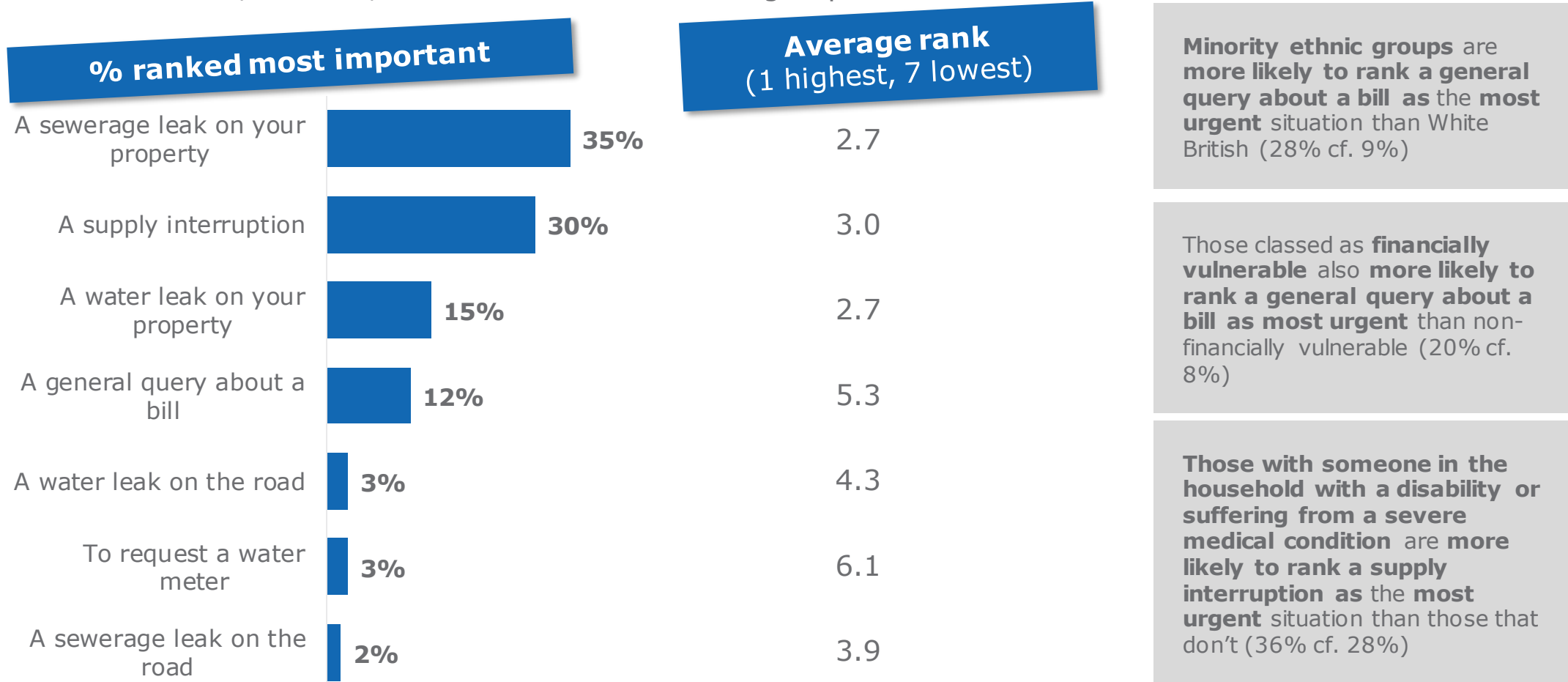


Contacting Yorkshire **Water:** channel preference for urgent contacts



Sewerage leaks and supply interruptions considered most urgent

Perhaps unsurprisingly, sewerage leaks and supply interruptions are considered the most urgent situations overall, however, there are a number of sub-group differences.



Base: all respondents (776). **Q011.** There are a number of different reasons why customers might need to contact Yorkshire Water, some of which are shown below. Looking at this list, please rank them from the situation you consider most urgent to the situation you consider least urgent?

Phone is the preferred method for the most urgent of contact reasons

Over four in five say that phone would be their preferred method of contact in the most urgent of situations.

Among **those who manage all of their accounts offline**, **95% say phone would be their preferred contact method, compared to 77% of those who manage all of their accounts online.**

Those aged 55+ (89%) are also more likely to prefer phone to their younger counterparts, while minority ethnic groups (70%) and financially vulnerable (74%) are less likely to cite phone.



83%
Phone



7%
Webchat



3%
Email



1%
Webform



3%
Other (Facebook, WhatsApp, Live Messenger combined)

A response in 15 minutes is expected, and webchat is seen as a secondary contact option

Expected response time

In less than 5 minutes: 41%

Between 5 and 15 minutes: 32%

Within half an hour: 12%

Over half an hour: 11%

Don't know: 3%



Other contact methods considered (outside of normal hours)

Phone preferred method: 56% would be willing to use webchat, 30% live messenger, 30% email, 20% webform, 16% WhatsApp, and 9% would not consider any other method.

Webchat preferred method: 62% would be willing to use phone, 47% live messenger, 37% email, 30% WhatsApp, 28% website form, 16% Facebook, 14% Twitter, and just 2% would not consider any other method.

Online updates can work to reduce call volumes

While customers expect a quick response times in emergency situations, providing online updates (when issues are known / planned / widespread) could help to reduce call volumes



The majority of customers would look online to find the number to call YW in the first instance. If the number was located alongside a list of known incidents (similar to details of known disruptions on the National Rail website), and some information about how it was being dealt with were provided, it would be enough to persuade some to hold off calling.



Providing customers with the option to sign up for text updates about the issue, would work for some

"I'm just thinking about National Rail and the app – there's always a notice at the top telling you about disruptions... If I find I've got no water I'm going to try and call Yorkshire Water straight away. On the contact number page there's some information about live incidents I can check to see if I'm on there and then I don't need to worry as much, and I can just check back."

Having links that are shareable on WhatsApp, Twitter etc. could help others to share with friends and neighbours

Customers intuitively want to call to get information about a situation. If this can be provided before the call, some will be satisfied that they're up to date and know what's happening

Most would use webchat instead if faced with a long hold-time, but it doesn't suit all groups

Recorded message on the phone advising 30 minute wait, and suggesting using webchat instead

Would use webchat instead: 60%

Would stay on hold: 24%

Would call again later: 10%

Other: 2%

Don't know: 3%

DEs would be **less likely to use webchat** (52%) than other SEG groups.

Just **13% of those who manage all their accounts offline would use webchat** (57% would stay on hold)

Financially vulnerable customers would also be less likely to use webchat than non-financially vulnerable customers (53% cf. 62%)

A wait time of 30 minutes would make me feel...

Angry/frustrated/annoyed: 18%

Okay/fine/no problem: 15%

Although many would use webchat if directed, for many it would be an irritation

While the consensus is that speed is the most important factor in trying to resolve an (urgent) issue, when faced with the inconvenience of switching channel to be served faster, many are unhappy with the prospect – even though they would be likely to do it if it saved them time.

And many fail to understand why it would be quicker.

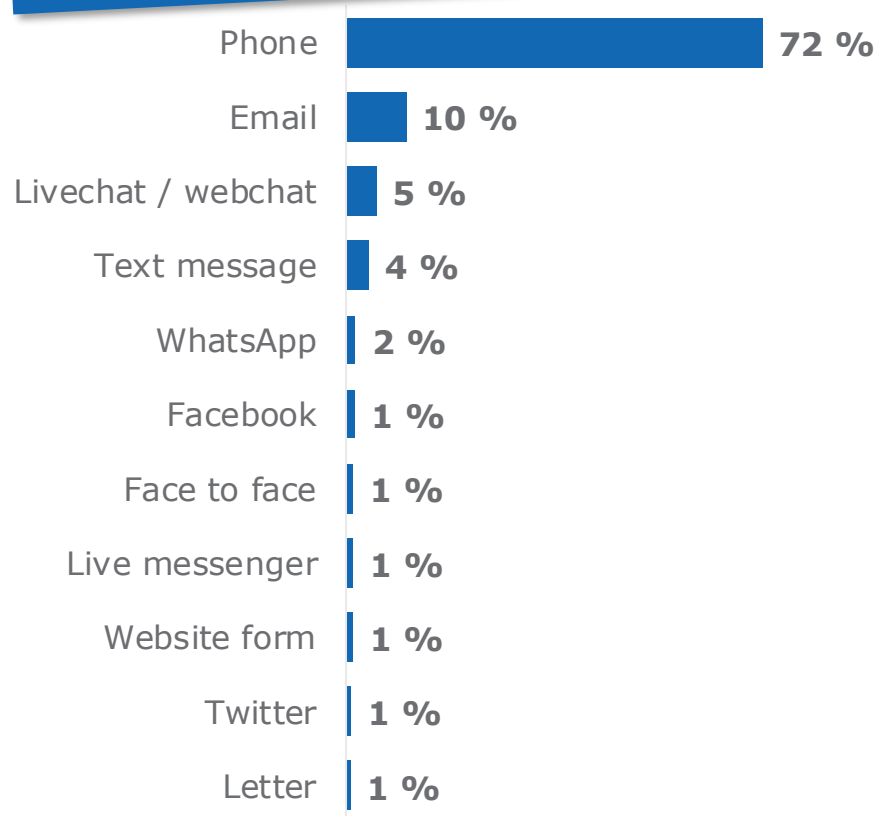
“Yeah, I probably would go onto webchat, but you can bet your bottom dollar that I’m staying on the phone as well. I’d stay connected on the phone until I’d definitely got what I wanted... Imagine you put the phone down, you try webchat and get nowhere, and then you’re straight to the back of the queue on the phone again... there’s not many things in life that get me really worked up, but that definitely would!”

Being directly ‘pushed’ to a different channel is an emotive issue for customers. At the outset, customers consider themselves the ‘lead’ party. Only when the issue has been reported and action plans in place does this change to YW being the ‘lead’. Before the change of dynamic, customers want to feel empowered to conduct the transaction in a way that suits them.

If YW couldn't respond there and then, most would want to be contacted by phone

Phone is the preferred return contact method for all groups – however, those from minority ethnic groups and those who manage all of their accounts online tend to be more mixed in their preferences.

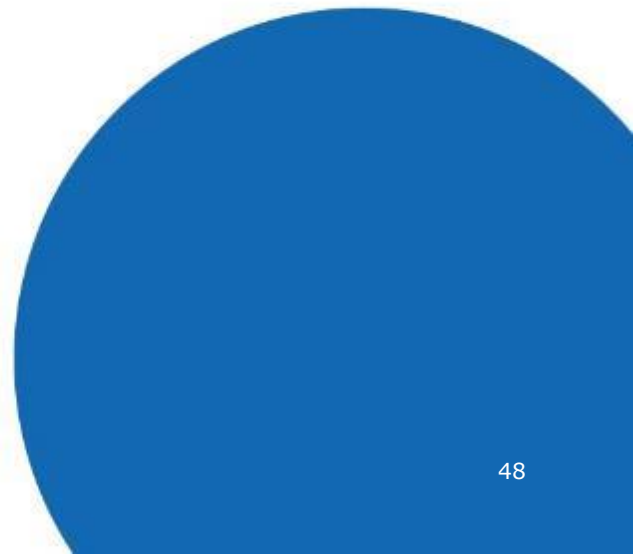
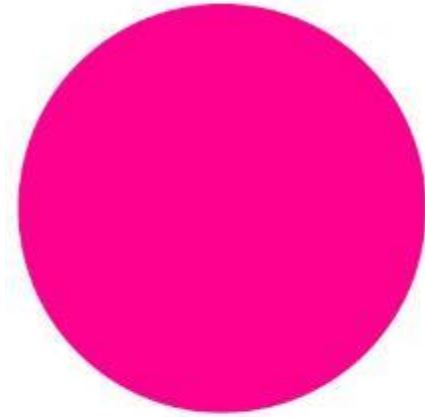
Would want YW to contact me by...



Minority ethnic groups are more likely to want an email (20%), and less likely to want a phone call (55%)

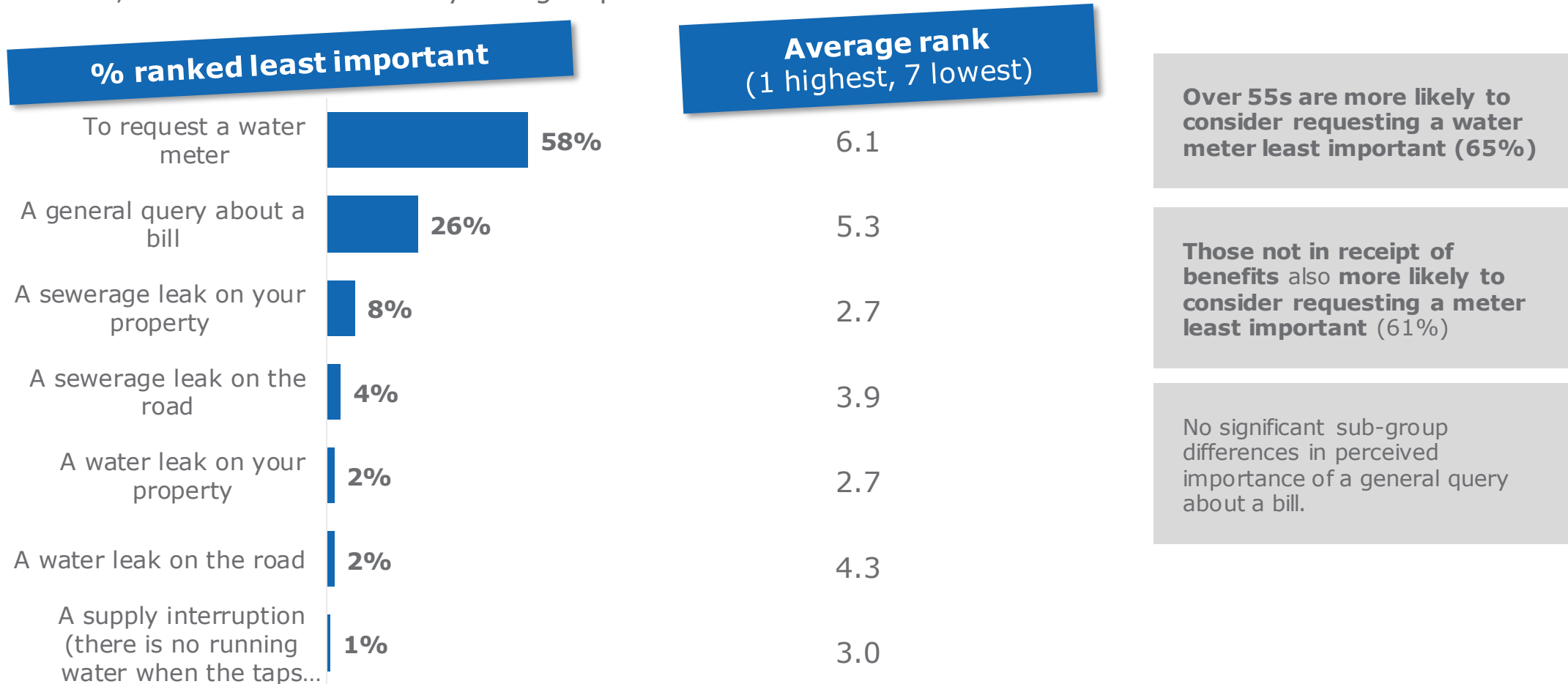
92% of those who manage all their accounts offline would want a phone call back, compared to 68% of those who manage all their accounts online

Contacting Yorkshire Water: channel preference for non-urgent contacts



Requesting a meter is considered the least urgent contact scenario

Perhaps unsurprisingly, requesting a meter is considered the least urgent contact scenario, however, there are differences by sub-group.



Base: all respondents (273). **Q011.** There are a number of different reasons why customers might need to contact Yorkshire Water, some of which are shown below. Looking at this list, please rank them from the situation you consider most urgent to the situation you consider least urgent?

Phone is the preferred method for non-urgent contacts, but by a much smaller margin

Among **those who manage all of their accounts offline**, **78% say phone would be their preferred contact method, compared to 27% of those who manage all of their accounts online.**



37%

Phone (-46% vs. most urgent)



22%

Email (+19%)



14%

Webform (+13%)



10%

Webchat (+3%)



6%

Other (Facebook, WhatsApp, Live Messenger, Twitter combined) (+3%)

Phone is less of a necessity for most **when it comes to non urgent contacts. However, those who don't manage accounts online** are **still** most likely to **want to phone**. While **email and webform** are much more **preferred for non-urgent contacts**, **webchat is unchanged**.

Response times are less critical for non-urgent contacts, with half expecting a response time of over half an hour

Expected response time

In less than 5 minutes: 14%
(-27% vs. most urgent situation)

Between 5 and 15 minutes: 20%
(-12%)

Within half an hour: 11% (-1%)

Over half an hour*: 48% (+37%)

*24% would expect a response
in 2-3 days

Don't know: 7% (+4%)



Other contact methods considered (outside of normal hours)

Phone preferred method: 41% would be willing to use email, 37% webchat, 14% webform, 14% live messenger, and 13% would not consider any other method

Email preferred method: 40% would be willing to use a webform, 31% webchat, 29% phone, 17% live messenger, 12% WhatsApp, and 8% would not consider any other method

Webform preferred method: 58% would be willing to email, 37% webchat, 22% phone, 13% live messenger, and 11% would not consider any other method

Base: all respondents (273). **Q012.** You said [INSERT MOST URGENT RESPONSE FROM Q11] was the most urgent reason to contact Yorkshire Water. Thinking about that scenario, how would you want to contact Yorkshire Water about this? **Base:** all respondents except don't their preferred contact method (540). **Q14.** If your contact was out of usual operating hours e.g. late at night, what other contact methods, if any, would you be willing to use to contact Yorkshire Water?

Many would use webchat instead if faced with a long hold-time, but it doesn't suit all groups

Recorded message on the phone advising 30 minute wait, and suggesting using webchat instead

Would use webchat instead: 42% (-18% vs. most urgent)

Would stay on hold: 23% (-1%)

Would call again later: 10% (+16%)

Other: 4% (+2%)

Don't know: 6% (+3%)

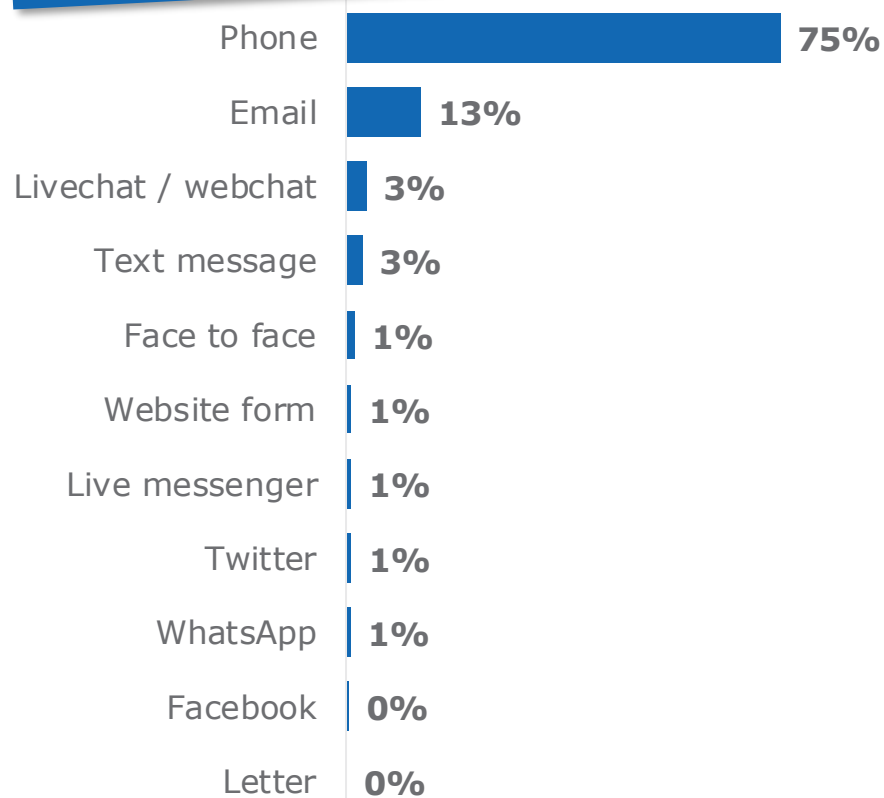
DEs would be **less likely to use webchat** (31%) than other SEG groups.

Just **10% of those who manage all their accounts offline would use webchat** (37% would stay on hold)

Even for non-urgent contacts, phone would be the preferred re-contact method

Phone is the preferred return contact method for all groups – however, DEs, those from minority ethnic groups and those who manage all of their accounts online tend to be more mixed in their preferences.

Would want YW to contact me by...



DEs are more likely to want an email (18%), and less likely to want a phone call (67%)

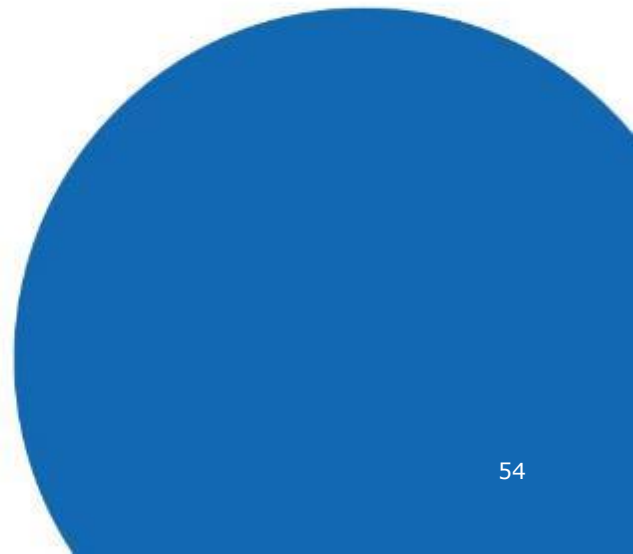
65% of those who manage all their accounts online would want a phone call back, compared to 85% of those who manage all their accounts offline

Contact methods not required for less urgent contacts...

There is no majority consensus on contact methods that aren't required for less urgent contacts; 19% say none could be removed and 17% don't know. 19% say Twitter would not be required, 18% Facebook, 16% phone, 15% letter 13% WhatsApp, and 11% email.

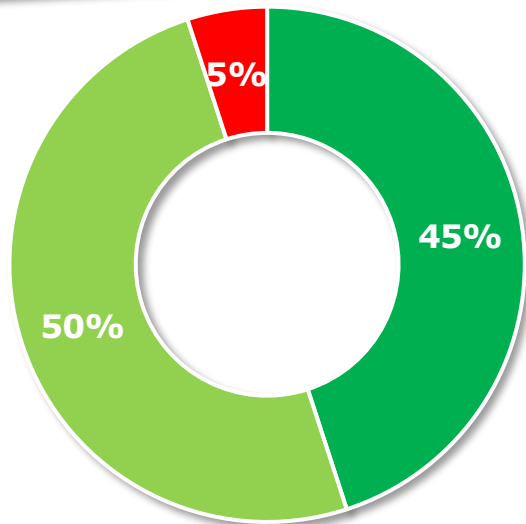
Base: all respondents (776). **Q022.** Say Yorkshire Water couldn't respond to you there and then, how would you want them to contact you back about this? / **Q023.** Thinking about queries which require less urgent responses, are there any customer contact methods from this list which you think Yorkshire Water could stop offering to customers?

Effectiveness of YW's channel strategy



Almost all customers consider YW's current operating hours acceptable

Acceptability of current operating hours



■ Very acceptable

■ Acceptable

■ Not acceptable (net)

Yorkshire Water's current operating hours for non-urgent contacts are:

Telephone: Mon-Fri 8am-8pm; Sat 9-5pm

Online Live chat: Mon-Sat 6.30am-10pm; Sun 7.30-10pm

Emergency contact is 24/7

Just 23% of those who manage all of their accounts offline find the current operating hours very acceptable, and 21% find them unacceptable

Reasons for finding current operating hours unacceptable

- Expect 24/7 service (18 mentions)
- Lack of non-online options at weekends (5 mentions)

Base: all respondents (776). **Q015.** You said that you would ideally want to contact Yorkshire Water by phone in this instance. What if you called and a recorded message said there was going to be a 30-minute wait time and suggested you use web chat instead. What would you do?

Most are broadly happy with the operating hours, but improvements are suggested

The majority consider YW's operating hours to be largely as expected, and in-line with other similar organisations. Although acceptable to most, it doesn't feel 'best in class' to many. With the lack of phone options on Sundays being a particular area of concern.

In addition, some are unsure how urgent and non-urgent situations would be decided or classified (e.g. is a bill for £1,000 urgent, or should that wait?)

"8 until 8 is as you'd expect – gives people who work 9-5 and have kids time to ring, although up until 10 on at least a couple of days would be good"

"Not having anyone on the phone on a Sunday doesn't seem right. It could just be 10-4 like the supermarkets"

Yorkshire Water's current operating hours for non-urgent contacts are:

Telephone: Mon-Fri 8am-8pm; Sat 9-5pm

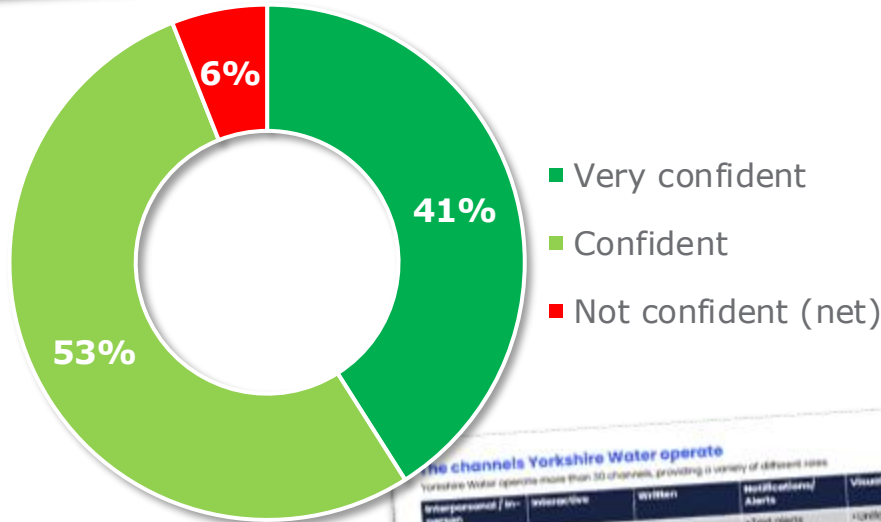
Online Live chat: Mon-Sat 6.30am-10pm;
Sun 7.30-10pm

Emergency contact is 24/7

- **Telephone hours:** mostly considered okay, but no Sunday is a surprise to many. Some would like a day or two with availability until 10pm as well
- **Online live chat:** as expected for most. Some would prefer hours to be switched with phone, which is seen as the more universal / accessible channel
- **Emergency contact:** as expected

Over nine in 10 are confident they would be able to contact YW in a way that suited them

Confidence in being able to contact via a channel that suits



The channels Yorkshire Water operate

Yorkshire Water operates more than 30 channels, providing a variety of different ways

Interpersonal / In-person	Interactive	Written	Notifications/ Alerts	Visual	Experiential
<ul style="list-style-type: none"> • Data management • Community engagement • Yorkshire Water offices • Service delivery partner 	<ul style="list-style-type: none"> • Inbound calls • Social media • Webchat • Outbound calls • Website • Mobile app • Self serve (online forms etc.) • Payments 	<ul style="list-style-type: none"> • Letters • Letters (bills) • Hard delivered letters • Hard delivered leaflets • Email • Automated and ad journey • Print - proactive emails • Email - end of complaint • Webforms • Web call back 	<ul style="list-style-type: none"> • Text alerts • Text updates/ notifications • Process generated • In-home displays • Push notifications 	<ul style="list-style-type: none"> • Uniforms • Vans • Street signage • Sites signage, e.g. treatment plants • Street marking 	<ul style="list-style-type: none"> • Infrastructure sites • Public events • Campaigns (multi-media)

22% of those who manage all of their accounts offline say they would not be confident they could contact YW using a method to suit their needs

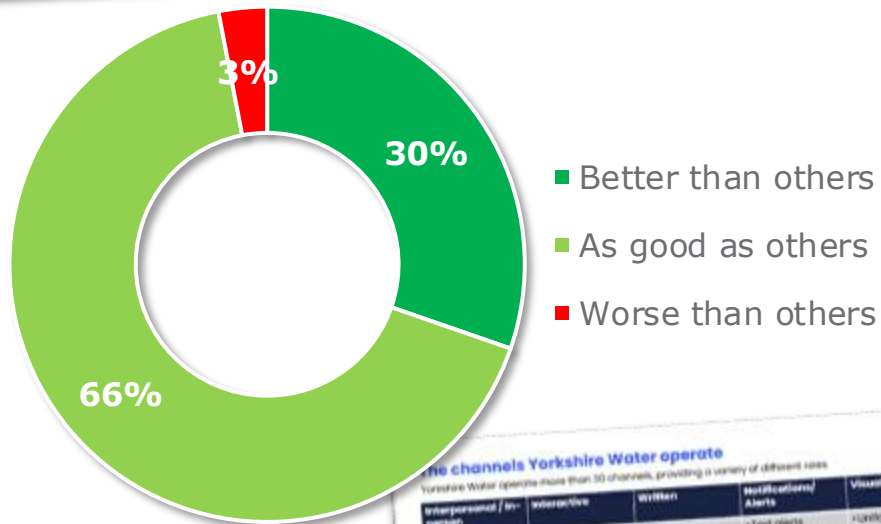
Reasons for not being confident finding a contact channel to suit

- Lack of confidence that there would be someone to answer the query (5 mentions)
- Feels like the contact options are trying to avoid 'personal' contact (moving away from phone) (4 mentions)

Base: all respondents (776). **Q027.** Looking at this list, how confident are you that you could contact Yorkshire Water using a method which suits your needs? / Base: all respondents who are not confident they could find a contact channel to suit their needs (30). **Q028.** Why do you say that? What is missing from the list?

Almost a third think YW's contact channels are better than others

Compared to others, YW's contact channels are...



- Better than others
- As good as others
- Worse than others

The channels Yorkshire Water operate
Yorkshire Water operates more than 30 channels, providing a variety of different rates

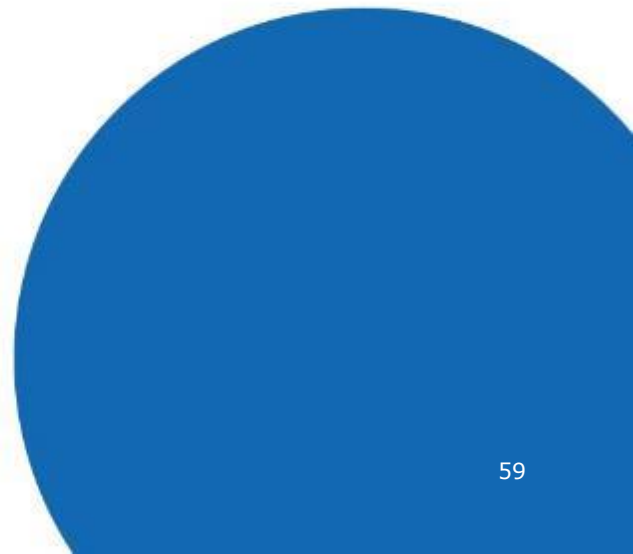
Interpersonal / In-person	Interactive	Written	Notifications/ Alerts	Visual	Experiential
<ul style="list-style-type: none"> • Debt management • Community engagement • Yorkshire Water offices • Service delivery partner 	<ul style="list-style-type: none"> • Inbound calls • Social media • Webchat • Outbound calls • Website • Mobile app • Self serve (online forms etc.) • Payments 	<ul style="list-style-type: none"> • Letters • Letters (Bills) • Hard delivered letters • Hard delivered leaflets • Email • Automated and ad journey • Email - proactive content • Email - end of complaint • Webforms • Web call back 	<ul style="list-style-type: none"> • Text alerts • Text updates/ notifications • Process generated in-home displays • Push notifications 	<ul style="list-style-type: none"> • Symbols • Icons • Street signage • Sites signage, e.g. treatment plants • Street marking 	<ul style="list-style-type: none"> • Spectacular sites • Public events • Campaigns (multi-media)

18-34s (44%), more likely to think YW's contact channels are better than others

Those who manage all of their accounts online are more likely to think YW's contact channels are better than others (38%)

Those who rate their satisfaction with YW between 0-4 out of 10 are more likely to say YW's contact channels are worse than others (28%)

Artificial intelligence and personal details



Just under one in 10 have used AI to contact a company, and a quarter would consider it

8%

have used AI (such as Siri or Alexa) to contact a company

Most likely to have used AI to contact:

- Minority ethnic groups (20%)
- 18-34 (15%)

Least likely to have used AI to contact:

- 55+ (3%)

24%

would consider contacting a company using AI in future

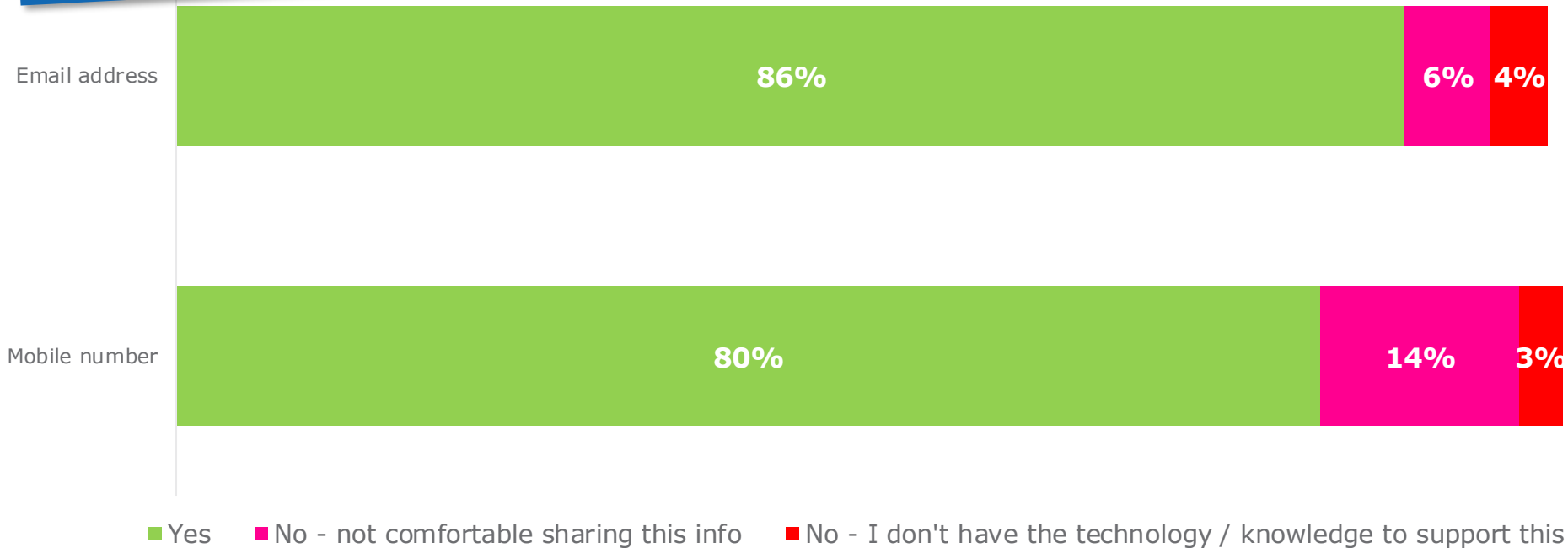
47% have the means to contact via AI, but don't want to

29% don't have the means to contact via AI:

- 42% of over 55s don't have the means
- 51% of those who manage all accounts offline don't have the means

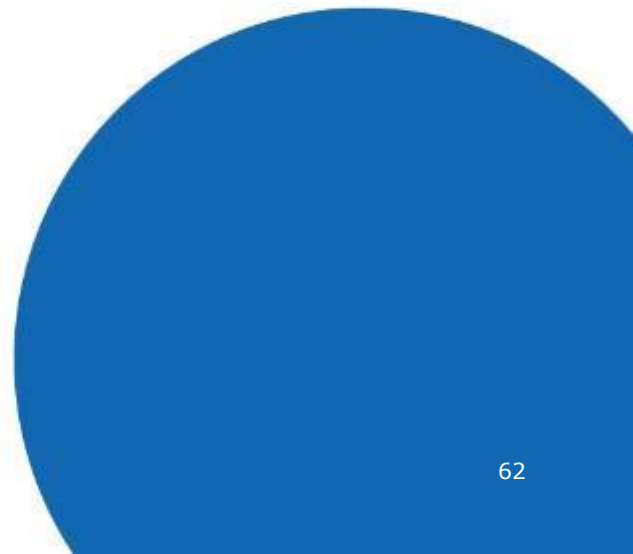
The vast majority would be happy to share their email and/or mobile number if contacted

If YW asked for details to enable them to send notifications, would you be willing?



Base: all respondents (776). **Q033.** If Yorkshire Water contacted you asking for the following details so they can provide you with e.g. text or email notifications, would you be happy to provide them with...

Conclusions & recommendations





Conclusions

Yorkshire Water's existing channel strategy and portfolio is considered suitable and appropriate by the majority, with no major overhauls required. In the main, customers want to see a few channels operated well and optimised for their purpose (not just providing channels and options for the sake of it). Largely YW are seen to do this, but there are some outstanding questions about how customers in vulnerable circumstances are considered.

Channel choice remains important to customers, and different contact scenarios are seen to suit different channels. Where contacts are considered urgent, the majority want to be able to phone YW in the first instance. However, where contacts are considered non-urgent a much wider range of channel options are considered acceptable, and most would accept being 'pushed' to the most appropriate channel if it achieves a quick resolution.

As well as urgent and non-urgent contacts, customer preferences on channel choice are often dictated by a calculation between transactional and personal / high-importance. The lines between transactional and personal are not always straightforward, and as a result choice remains an important factor for customers.

The majority of customers are happy to adopt new channels or technologies to enable them to communicate with companies, but the expectation is that the channels and technologies provide solutions / improvements to existing processes. Customers are quick to see where companies have made adjustments to their strategy in response to customer need, and where they have (seemingly) been made to aid the company over and above customer convenience.



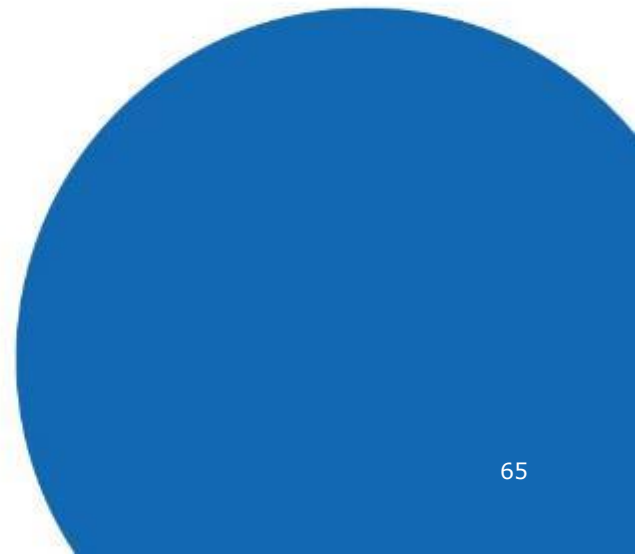
Recommendations

YW's existing channel strategy works well for the majority of customers, and provides the level of service and availability that most would expect. To further develop the strategy and improve performance against the Needs States model, focusing on cohesion between channels. This is likely to provide the most benefit to YW and its customers.

The main factors that can 'break' a transaction or communication between a company and a customer relate to lack of speed, lack of (obvious) joined up thinking, and contact channels being (noticeably) reduced or obscured. Ensuring that the entire channel portfolio is overseen centrally could help ensure that customers are served in the quickest way possible, and in a way that suits them and their needs.

Customers continue to want to have the option of phoning, and many are particularly keen that older and vulnerable customers are not 'left out'. Providing comms (where relevant) to reassure customers that YW are still available on the phone, and that will always offer a means of contact for all customers, will help to ensure YW's channel strategy continues to be seen as better or equal to other companies and organisations.

Appendix: key questions





Contacted Yorkshire Water in the last 12 months

Total (776)	Gender		Age band			Social grade			Ethnicity	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b
22%	22%	21%	34% ^{bc}	25%	14%	23%	25% ^c	16%	21%	27%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
26% ^b	19%	16%	25%	21%	20%	29% ^b	20%	30% ^b	18%	30% ^b	19%



Would choose to contact Yorkshire Water by phone if the scenario was urgent

Total (776)	Gender		Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
83%	82%	83%	79%	77%	89% ^{ab}	81%	83%	84%	84% ^b	70%	86%	81%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
84%	82%	95% ^b	77%	85% ^b	85% ^b	85%	82%	83%	83%	74%	86% ^a

Base: All respondents **Q012**. You said [INSERT MOST URGENT RESPONSE FROM Q11] was the most urgent reason to contact Yorkshire Water. Thinking about that scenario, how would you want to contact Yorkshire Water about this? (answered - phone)



Would choose to contact Yorkshire Water by phone if the scenario was not urgent

Total (776)	Gender		Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
37%	35%	40%	36%	32%	42% ^b	29%	38% ^a	42% ^a	37%	41%	34%	38%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
38%	37%	78% ^{bcd}	27%	39% ^b	26%	39%	37%	41%	36%	44% ^b	35%

Base: All respondents **Q018**. You said [INSERT LEAST URGENT RESPONSE FROM Q11] was the least urgent reason to contact Yorkshire Water. Thinking about that scenario, how would you want to contact Yorkshire Water about this? (answered - phone)



Most important qualities when contacting a company about a query or issue

	Total (776)	Gender		Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
		Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
Speed (the speed in which you're able to resolve a query or issue)	1.8	1.9	1	1.7	1	1.9	1.9	1.8	1.8	1.8	1.9	1.8	1.8
Ease (the ease with which you're able to resolve a query or issue)	2.3	2.2	2.3	2.3	2.3	2.2	2.1	2.4	2.2	2.3	2.3	2.3	2.2
Convenience (being able to contact a company in a way that suits you)	2.6	2.6	2.7	2.8	2.5	2.7	2.7	2.6	2.7	2.7	2.6	2.7	2.6
Empathy (dealt with in a way that is understanding of you/your needs)	3.3	3.3	3.2	3.2	3.3	3.3	3.3	3.3	3.2	3.3	3.3	3.2	3.3

Base: All respondents **Q024**. Below are a number of different things people have said are important to them when contacting a company about a query or an issue. Looking at the list below, please rank them from the most important to least important to you.



Most important qualities continued.

	Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
	Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
Speed (the speed in which you're able to resolve a query or issue)	1.9	1.8	1.9	1.8	1.9	2.0	1.9	1.8	1.9	1.8	1.9	1.8
Ease (the ease with which you're able to resolve a query or issue)	2.2	2.3	2.0	2.3	2.3	2.3	2.4	2.2	2.3	2.2	2.3	2.2
Convenience (being able to contact a company in a way that suits you)	2.7	2.6	2.7	2.7	2.6	2.6	2.7	2.6	2.7	2.7	2.7	2.6
Empathy (dealt with in a way that is understanding of you/ your needs)	3.3	3.3	3.5	3.2	3.3	3.2	3.1	3.3	3.2	3.33	3.1	3.3

Base: All respondents **Q024**. Below are a number of different things people have said are important to them when contacting a company about a query or an issue. Looking at the list below, please rank them from the most important to least important to you.



Very confident they could contact Yorkshire Water using a method which suits their needs

Total (776)	Gender		40%Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
41%	41%	41%	45%	42%	40%	38%	45%	40%	43%	34%	43%	41%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
43%	40%	20%	49% ^{ac}	39%	40% ^a	40%	42%	40%	42%	36%	44% ^a

Views Yorkshire Water's contact channels overall as superior to those offered by other companies

Total (776)	Gender		Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
30%	30%	30%	44% ^{bc}	29%	26%	30%	34%	26%	30%	34%	40% ^b	27%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
30%	32%	15%	38% ^{ac}	28%	30% ^a	33%	30%	27%	32%	26%	32%



Have used artificial intelligence such as Siri or Alexa to contact a company

Total (776)	Gender		40%Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
8%	10% ^b	6%	15% ^c	11% ^c	3%	8%	9%	5%	6%	20% ^a	16% ^b	5%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
10% ^b	6%	8%	9%	7%	5%	9%	7%	10% ^b	6%	13% ^b	6%



Would provide their mobile phone number to receive text notifications from Yorkshire Water

Total (776)	Gender		40%Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
80%	81%	79%	79%	79%	82%	76%	81%	83% ^a	82% ^b	66%	84%	80%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
80%	81%	83%	82%	79%	84%	82%	80%	85%	79%	75%	82% ^a

Base: All respondents **Q033**. If Yorkshire Water contacted you asking for the following details so they can provide you with e.g. text or email notifications, would you be happy to provide them with your mobile phone number (answered yes)...



Would provide their email address to receive email notifications from Yorkshire Water

Total (776)	Gender		40%Age band			Social grade			Ethnicity		Contacted YW in the last 12 months	
	Male (319) a	Female (453) b	18-34 (163) a	35-54 (285) b	55+ (315) c	AB (228) a	C1C2 (349) b	DE (186) c	White: British (679) a	BME (97) b	Yes: (179) a	No: (580) b
86%	83%	88% ^a	86%	87%	85%	89%	87%	82%	87% ^b	79%	91% ^b	85%

Water Meter		Account Management				Member of household registered disabled?		Do you currently receive benefits?		Financially vulnerable?	
Yes (433) a	No (320) b	Offline only (44) a	Online only (274) b	Mix of online & offline (454) c	All online except YW (162) d	Yes (171) a	No (605) b	Yes (224) a	No (525) b	Yes (235) a	No (541) b
89% ^b	83%	55%	91% ^{a,c}	86%	94%	80%	87% ^a	81%	87%	79%	88%

Base: All respondents **Q033**. If Yorkshire Water contacted you asking for the following details so they can provide you with e.g. text or email notifications, would you be happy to provide them with your email address (answered yes)...



More about online panel surveys

Our panel providers recruit panelists using a myriad of methods including open recruitment across the web, via mobile app panels, social media influencers, billboards, online and in-app advertising, paid search, and more. This group generally mirrors the broad, general population well, with diverse income and education levels. It provides strong population coverage across the most countries globally. Panelists may also come via partnerships with publishers, social networks, additional websites and more. These people tend to be younger, can add additional coverage of minority groups.

People may respond to a general email invitation inviting them to take part in a survey – or they may choose to visit their panel portal and enter the router from there. Once they click to begin, the system excludes any survey for which the person could not qualify based on what is already known about the person, then seeks to match them to a remaining survey, using further questions to make the match.

Our providers bring an array of solutions to fraud control, using traditional techniques, but increasingly leveraging AI and Machine Learning. Typically panelists are checked at enrollment - device and IP anomaly and reputation checks, open-end engagement tests, analysed via machine learning. These tools use multiple data points to confirm identity, identify duplicates, and look for unlikely patterns (indicative of fraud) and in the survey router –digital fingerprinting, geo location clues and a second round of the checks used at enrollment confirm identity and identify suspicious behaviour.

For more information



Ali Sims, Research Director

asims@djsresearch.com

Matt Prince, Associate Director

mprince@djsresearch.com

Head office: 3 Pavilion Lane, Strines,
Stockport, Cheshire, SK6 7GH

Leeds office: 2 St. David's Court,
David Street, Leeds, LS11 5QA

+44 (0)1663 767 857
djsresearch.co.uk



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