



29 / 03 / 21

Stakeholder Tracker Results: Quarter 1 2021

Our ref. J3069.4



DEFINING THE **CLEAREST** DIRECTION

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Stakeholder Tracker

On-going research programme among stakeholders - individuals and organisations who have a professional interest or concern in what the company is doing

Covering:

- Trust and other brand values measures
- Likelihood to recommend, with reasons
- Overall satisfaction
- Contact satisfaction (where applicable)
- Preferences for information channels

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Approach

- Carried out by phone
- 50 interviews per quarter
- Sample provided by NWG
- Quotas set in proportion to the profile of stakeholders, by:
 - Region - NW, ESW, National
 - Type – Public affairs, NGO, media

Qtr1 2021

Fieldwork carried out:

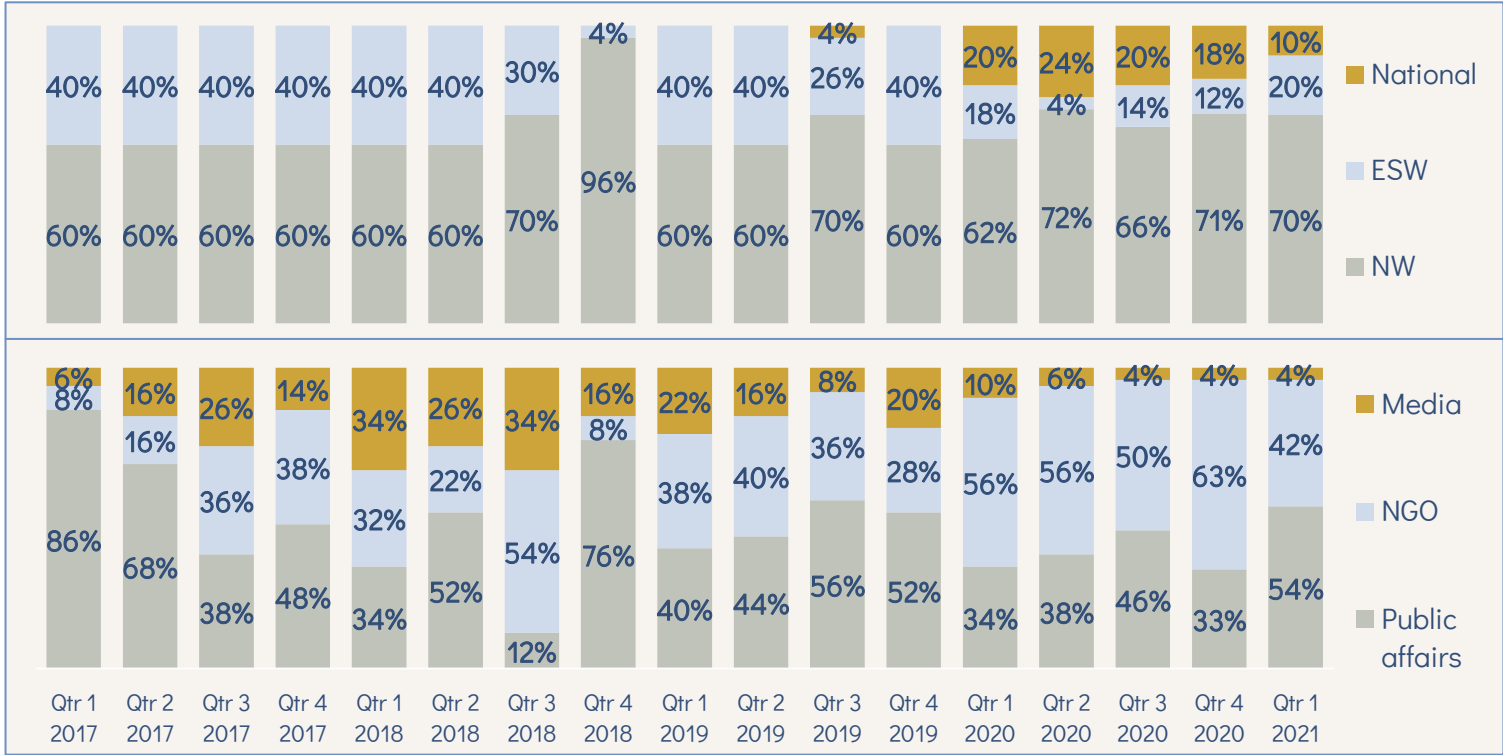
23 February – 22 March 2021

(Due to the Covid-19 restrictions, many stakeholders were still not back in the office)

We have merged all previous data and the latest results have been tested for statistical significance vs earlier waves. Significantly different figures are highlighted with circles - green indicates a significantly higher result than any figure circled red in the same row



Variation in the profile from wave to wave to each sample of 50 means that differences in the results may be a result of differences in the profile

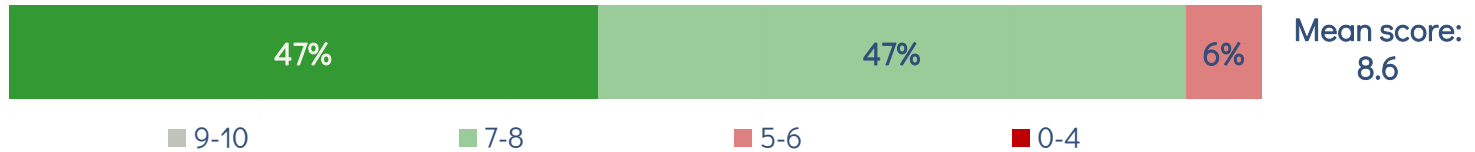


(Qtr4 '18 – 25 interviews)



Trust

NWG are a company you can trust (10 = agree strongly, 0 = disagree strongly)



Base: all respondents, where answer given (49)

Region	NW (35)	8.7
	ESW (9)	7.9
	National (5)	9.0
Type	Public affairs (27)	8.2
	NGO (21)	9.2
	Media (2)	8.5

I think their corporate objectives are very much to be admired, they do a lot for society and the broader community and the environment

I find them very open and honest, and they are responsive to any negative feedback

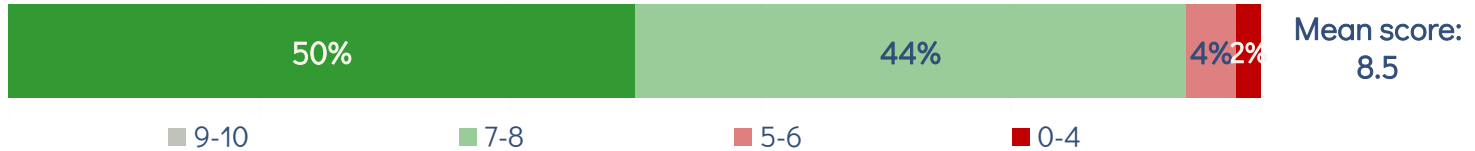
A lot of my dealings are with their Senior Leadership Team and CEO. They're always looking to do the right thing in terms of sustainability, their customers' affordability, and looking after their region for social mobility and things like that

In all the dealings I have had with them I have got the impression that integrity is important from the top down



Overall satisfaction

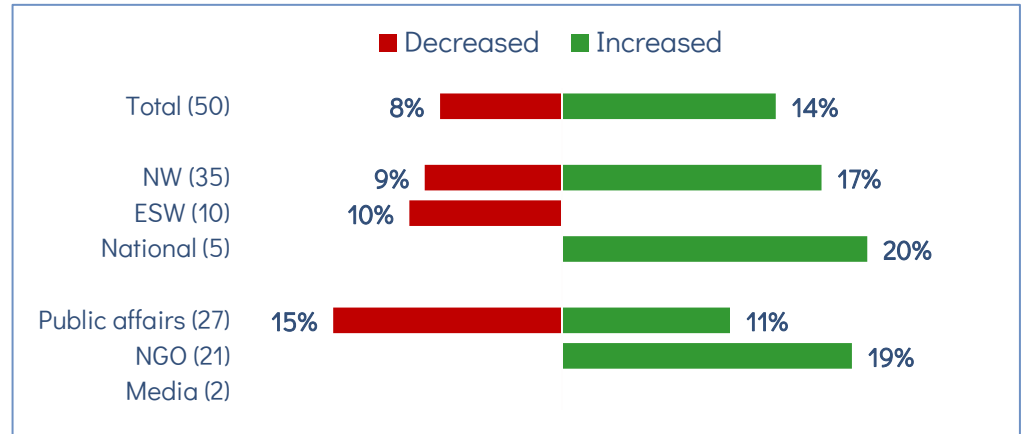
How satisfied are you overall with NWG (10 = very satisfied, 0 = very dissatisfied)



Base: all respondents, where answer given (50)

Region	NW (35)	8.6
	ESW (10)	8.1
	National (5)	8.8
Type	Public affairs (27)	8.2
	NGO (21)	8.9
	Media (2)	8.5

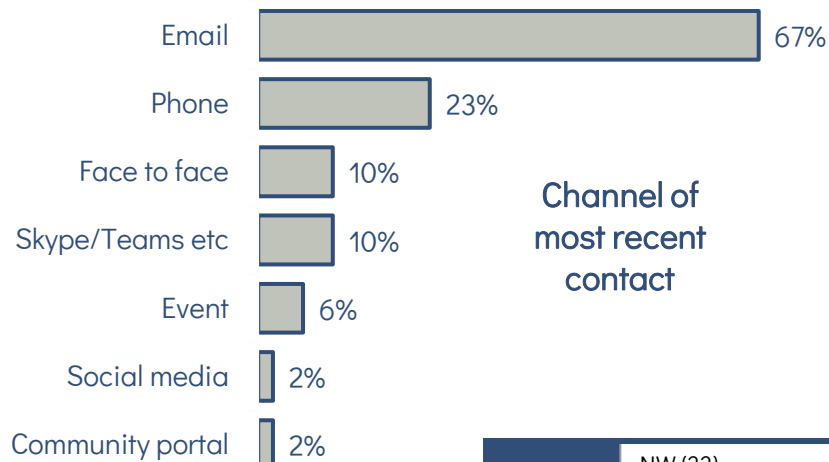
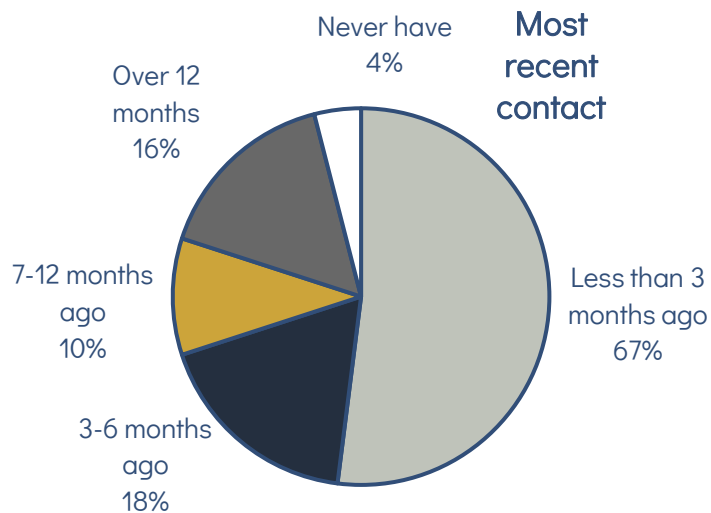
Overall satisfaction change over the last year



Base: all respondents (as shown)



Contact



Region	Count	Score
NW	33	8.6
ESW	8	8.1
National	5	8.8

Type	Count	Score
Public affairs	25	8.2
NGO	19	9.0
Media	2	9.0

Satisfaction with most recent contact



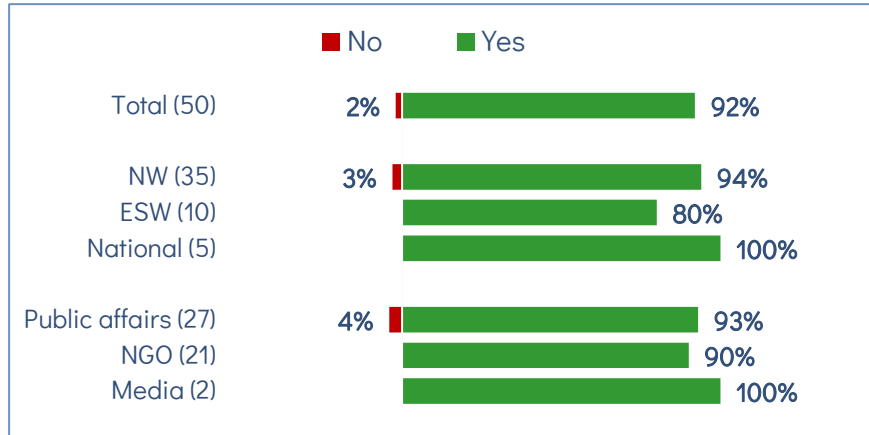
Mean score:
8.6

Base: have had contact, where answer given (46)

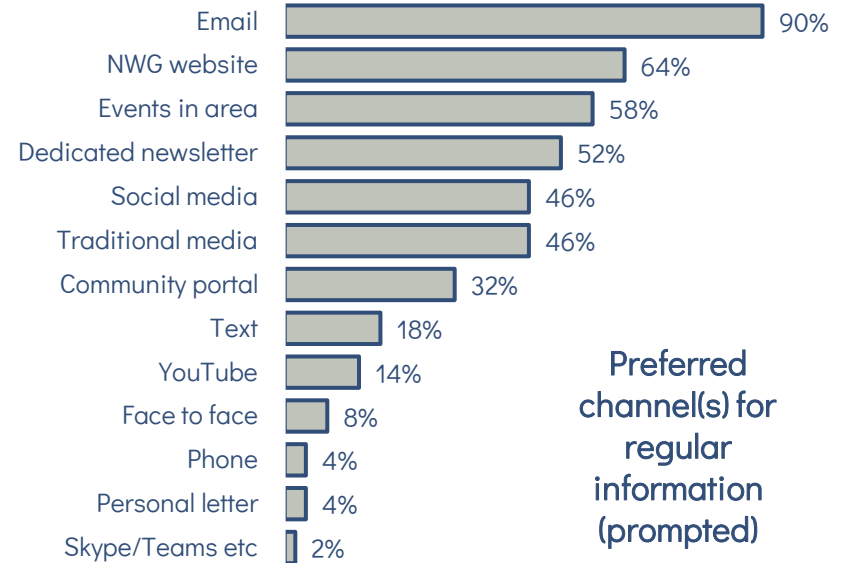


Information

Been supplied with all the info wanted



Base: all respondents (as shown)

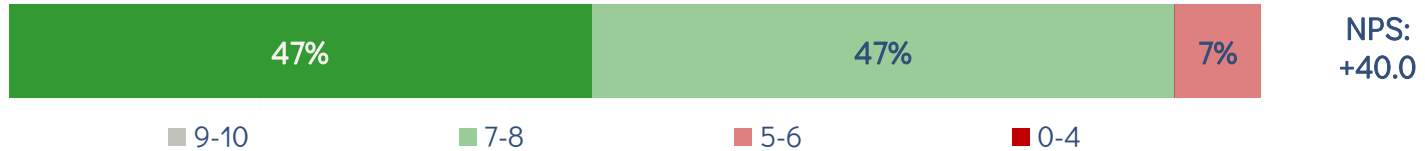


Preferred channel(s) for regular information (prompted)



NPS

Likelihood to recommend NWG (10 = very likely, 0 = very unlikely)



Base: all respondents, where answer given (45)

Region	NW (31)	+48.4
	ESW (10)	0.0
	National (4)	+75.0
Type	Public affairs (26)	+19.2
	NGO (17)	+70.6
	Media (2)	+50.0

I've found all their representatives good to deal with. Some of my team and I work directly with them, and through Kielder Water they do seem to care about their customers, and their corporate and social responsibilities and they engage with their workforce

Because they provide an excellent service. They have regularly won awards for being the best water provider in the country, also their corporate social responsibility and ethical policies. They are probably held as the best employer in the North East. They are a great example being a leader as an employer, and as a business they are a great example for others to follow

They are okay, but it's difficult to separate out my experience of them in professional and domestic, they're not perfect but in the middle

Last year we had some incidents of smells. There have been a few burst water mains which they need to get on top of and we had sewage... They were doing some works down the road and we had quite a few rats causing problems

I find them very open and honest to deal with, and they have very high standards of service. They have reduced their prices quite significantly recently

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Brand values – progress monitoring

Brand values	2017 total	2018 total	2019 total	2020 total	2021 YTD
Provide an unrivalled customer experience	7.8	8.0	7.1	7.6	7.8
Provide affordable and inclusive services			7.5	8.2	8.1
Provide reliable and resilient services			8.2	8.5	8.6
Leading in innovation	7.6	7.9	7.3	8.4	8.2
Trust they work with others to improve the environment	7.9	8.2	8.0	8.8	8.2
Contribute to successful economy in region			7.8	8.5	8.1
Company you can trust	8.1	8.2	8.2	8.7	8.6
Leading company in tackling leakage			7.6	7.8	7.4

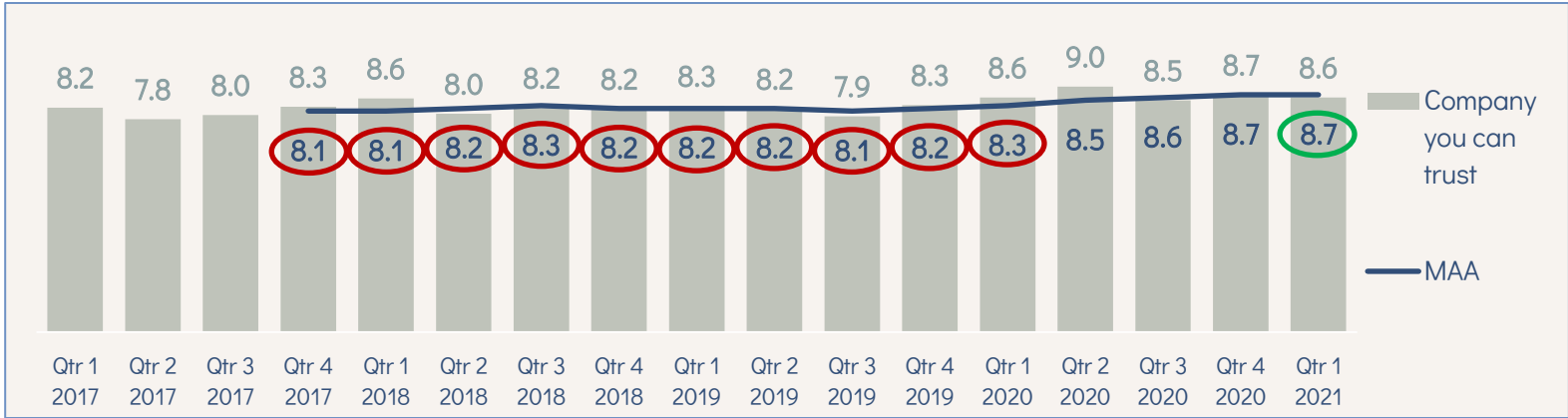


The sample base each quarter is relatively small, so the scope for analysis of trends within the region and sample type sub-groups is limited. We have therefore run 'moving annual averages' (MAA) in order to increase the sub-group bases and also to iron out peaks and troughs in the data caused by sample profile differences from wave to wave.

Each MAA data point is a total of the interviews completed in the 4 quarters up to and including that wave. This gives us total bases averaging around 120 for NW and 60-80 for ESW, along with 90 for public affairs, 65 for NGOs and 40 for media; it is then possible also to significance test the MAA data points.

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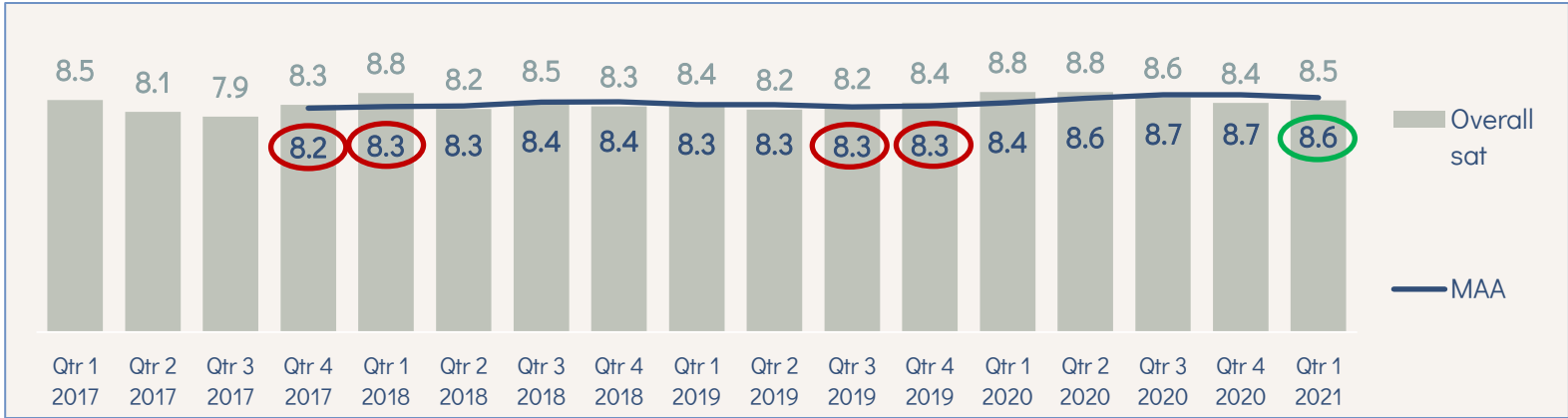
Trust – the moving annual average is now significantly higher than it has been previously



MAA - 12 months to:		Qtr4 '17	Qtr1 '18	Qtr2 '18	Qtr3 '18	Qtr4 '18	Qtr1 '19	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
Region	NW	8.3	8.4	8.5	8.4	8.3	8.3	8.2	8.2	8.2	8.3	8.6	8.6	8.7	8.7
	ESW	7.7	7.7	7.8	7.9	8.1	7.9	8.2	8.1	8.1	8.0	7.9	8.3	8.2	8.1
Type	Public	7.9	7.7	8.0	8.0	8.1	8.3	8.2	8.0	8.2	8.1	8.3	8.5	8.5	8.4
	NGO	8.5	8.7	8.4	8.4	8.3	8.0	8.3	8.3	8.3	8.6	8.7	8.8	8.9	9.0
	Media	8.0	8.3	8.2	8.4	8.3	8.2	8.2	8.1	7.9	7.7	7.9	7.8	7.8	8.3



Overall satisfaction – also trending upwards in recent quarters



MAA - 12 months to:		Qtr4 '17	Qtr1 '18	Qtr2 '18	Qtr3 '18	Qtr4 '18	Qtr1 '19	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
Region	NW	8.4	8.5	8.5	8.6	8.5	8.3	8.3	8.3	8.3	8.5	8.7	8.7	8.6	8.5
	ESW	7.9	7.9	7.9	8.2	8.4	8.4	8.4	8.2	8.3	8.1	8.1	8.3	8.3	8.3
Type	Public	8.2	8.0	8.1	8.2	8.4	8.4	8.4	8.3	8.3	8.3	8.4	8.5	8.5	8.4
	NGO	8.4	8.7	8.6	8.7	8.6	8.3	8.4	8.3	8.3	8.6	8.7	8.8	8.8	8.7
	Media	8.0	8.3	8.2	8.4	8.3	8.3	8.1	7.9	8.1	8.1	8.6	8.5	8.6	8.2



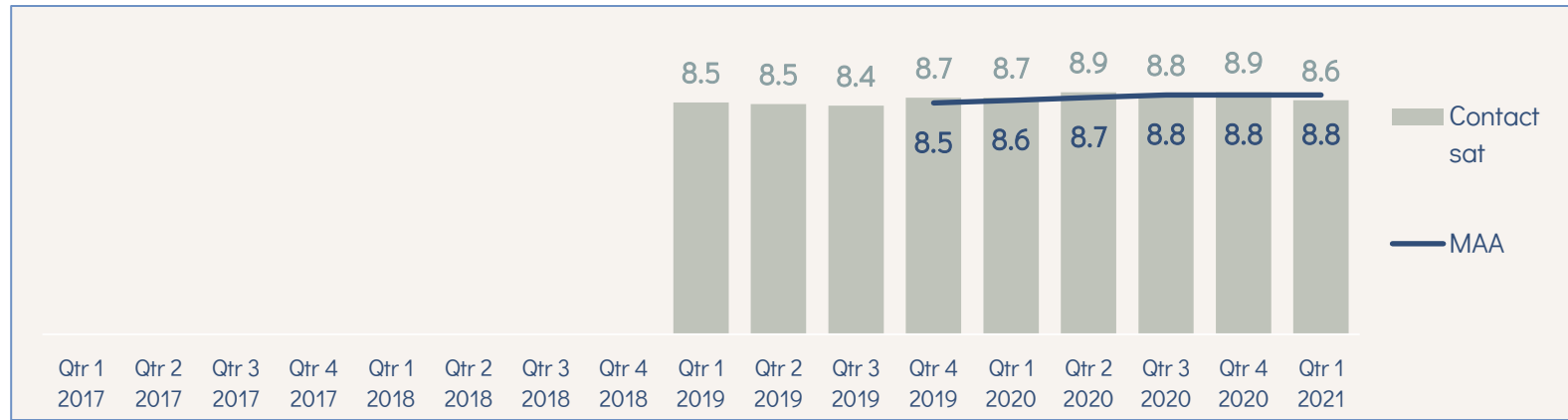
The overall NPS measure has improved vs the last couple of years, driven by gains in NW



MAA - 12 months to:		Qtr4 '17	Qtr1 '18	Qtr2 '18	Qtr3 '18	Qtr4 '18	Qtr1 '19	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
Region	NW	39.1	44.6	43.6	40.5	32.7	29.2	27.8	33.3	31.4	38.7	50.0	47.5	50.8	48.0
	ESW	15.3	7.2	11.3	16.9	21.3	23.5	26.0	19.1	8.5	-4.1	-24.2	-13.3	-4.5	0.0
Type	Public	33.0	25.0	30.7	29.7	34.4	43.3	36.1	34.2	22.5	16.9	23.7	28.8	40.9	35.1
	NGO	41.3	47.4	39.0	40.6	35.8	21.8	27.9	27.7	29.8	34.8	47.4	49.4	47.0	54.9
	Media	-3.7	9.1	15.8	20.9	12.5	9.5	11.1	12.5	10.7	18.2	18.8	6.3	30.0	14.3



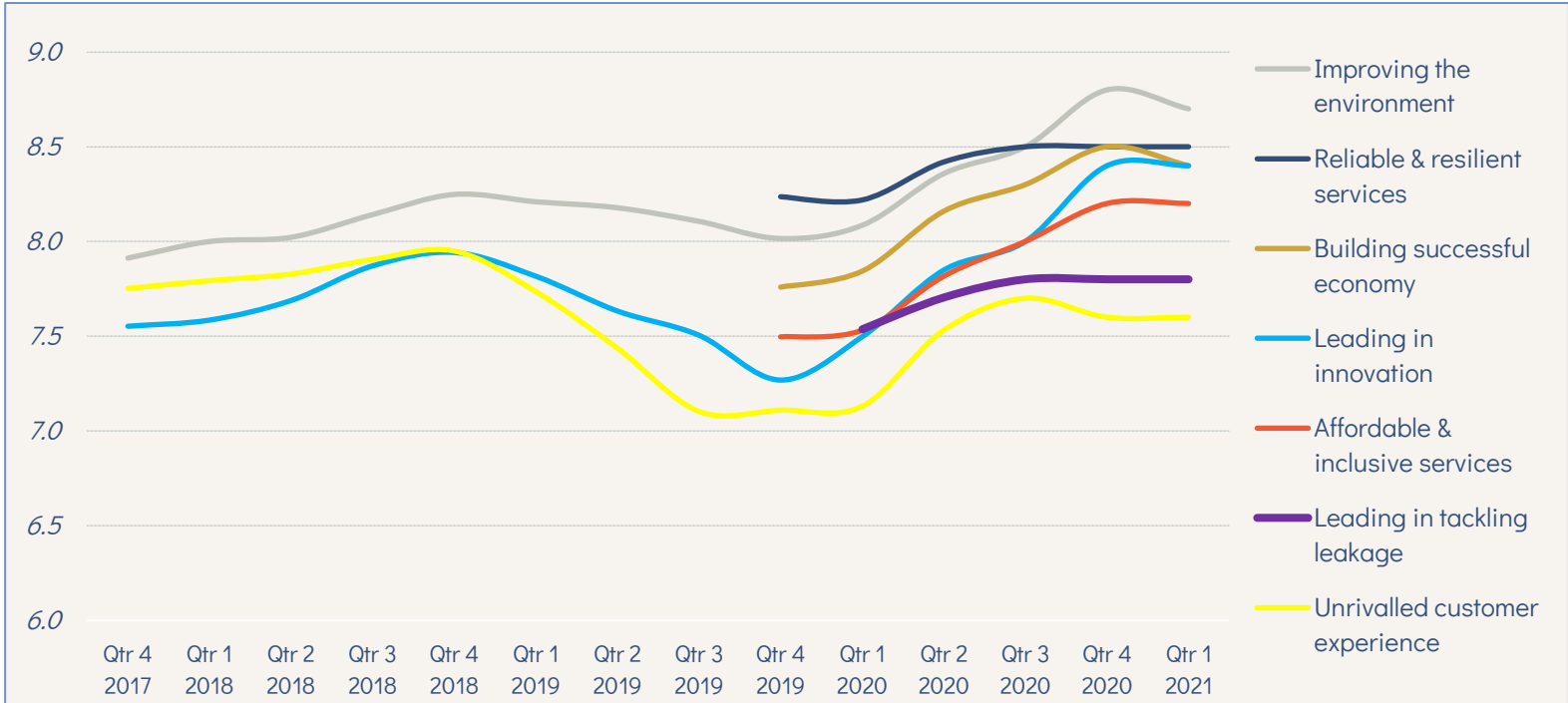
The contact satisfaction moving annual average is trending upwards – but not in ESW



MAA - 12 months to:		Qtr4 '17	Qtr1 '18	Qtr2 '18	Qtr3 '18	Qtr4 '18	Qtr1 '19	Qtr2 '19	Qtr3 '19	Qtr4 '19	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21
Region	NW									8.5	8.6	8.7	8.8	8.8	8.8
	ESW									8.4	8.2	8.1	8.2	8.0	8.2
Type	Public									8.4	8.4	8.5	8.6	8.8	8.7
	NGO									8.7	8.8	8.9	8.9	8.9	8.9
	Media									8.4	8.3	8.5	8.6	8.3	8.4



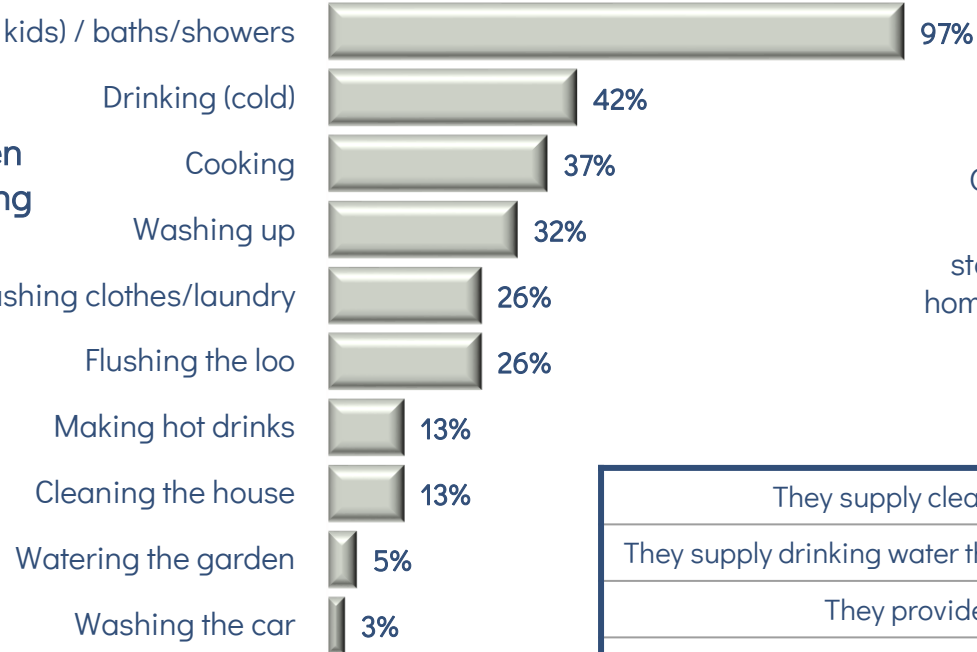
The other brand values moving annual averages show a dip from the end of 2018 and through 2019 but a recovery in recent waves



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76% of stakeholder respondents are supplied by NW or ESW at home

First 3 things that come to mind, when thinking about using water at home:



Of those expressing a preference, **89%** of stakeholders supplied at home by NW/ESW prefer tap water over bottled

They supply clean and clear drinking water	9.1
They supply drinking water that tastes and smells good	9.1
They provide a reliable supply of water	9.3
They provide sufficient pressure	8.8



DEFINING THE **CLEAREST** DIRECTION

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THANK YOU

NWG
living water

All of our work is carried out in accordance with the requirements of the international quality standard specific to the market research industry, ISO 20252

