

STAKEHOLDER TRACKING

Q1 2022

CONTENTS

- 1 Introduction** ([page 3](#))
- 2 Summary** ([page 4](#))
- 3 Sample profile** ([pages 5 to 6](#))
- 4 Satisfaction** ([pages 7 to 11](#))
- 5 NPS** ([pages 12 to 14](#))
- 6 Contact** ([pages 15 to 17](#))
- 7 Moving Annual Average comparisons** ([pages 18 to 24](#))
- 8 Tap or bottled water preference** ([pages 25 to 26](#))

STAKEHOLDER TRACKING – Q1 2022

INTRODUCTION

This is an ongoing research programme with NWGs key stakeholders

- Carried out by phone
- 50 interviews per quarter
- Data provided by NWG to Trinity McQueen
- Quotas set in proportion to the profile of stakeholders by:
 - Region – NW, ESW and National
 - Type – Public Affairs, NGO and Media
- Q1 fieldwork dates: 28 February to 12 April
- Average interview length: 12.5 minutes

Topics discussed cover:

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

Type of business	Number of interviews
Public	27
NGO	19
Media	4

Location	Number of interviews
NWG	50
NW	27
ESW	9
National	14

STAKEHOLDER TRACKING – Q1 2022

SUMMARY

As seen with the Q1 results we continue to see a slight dip in scores, mainly due to the low number of monthly responses and the stakeholder type being interviewed quota differing each phase.

drop in expected, due to the low number of responses so far this year, we see a drop in most scores when comparing to the 2021 YTD results. When compared to the previous quarter we see a drop in a high proportion of scores overall, in particular, NPS 17.5 (down 21.5), this is mainly due to the score for National 0 (down 37.5) and NW 22.7 (down 22.5). Whereas in ESW we seen an increase of 25, now scoring 25 for Q1.

Satisfaction with most recent contact overall (8.5) is down 0.4. Both NW (7.2) and ESW (8.0) see a drop of 0.6 and 0.3 respectively.

Agreement with all brand value statements are down overall, the biggest drop being seen for providing affordable and inclusive services 7.4 and contributing to building a successful economy in the region 7.7 (both down 0.4). NW's biggest drop is for providing affordable and inclusive services (7.0), down 1.1.

ESW scores have increased for all brand value statements when compared to Q4 2021, the highest being:

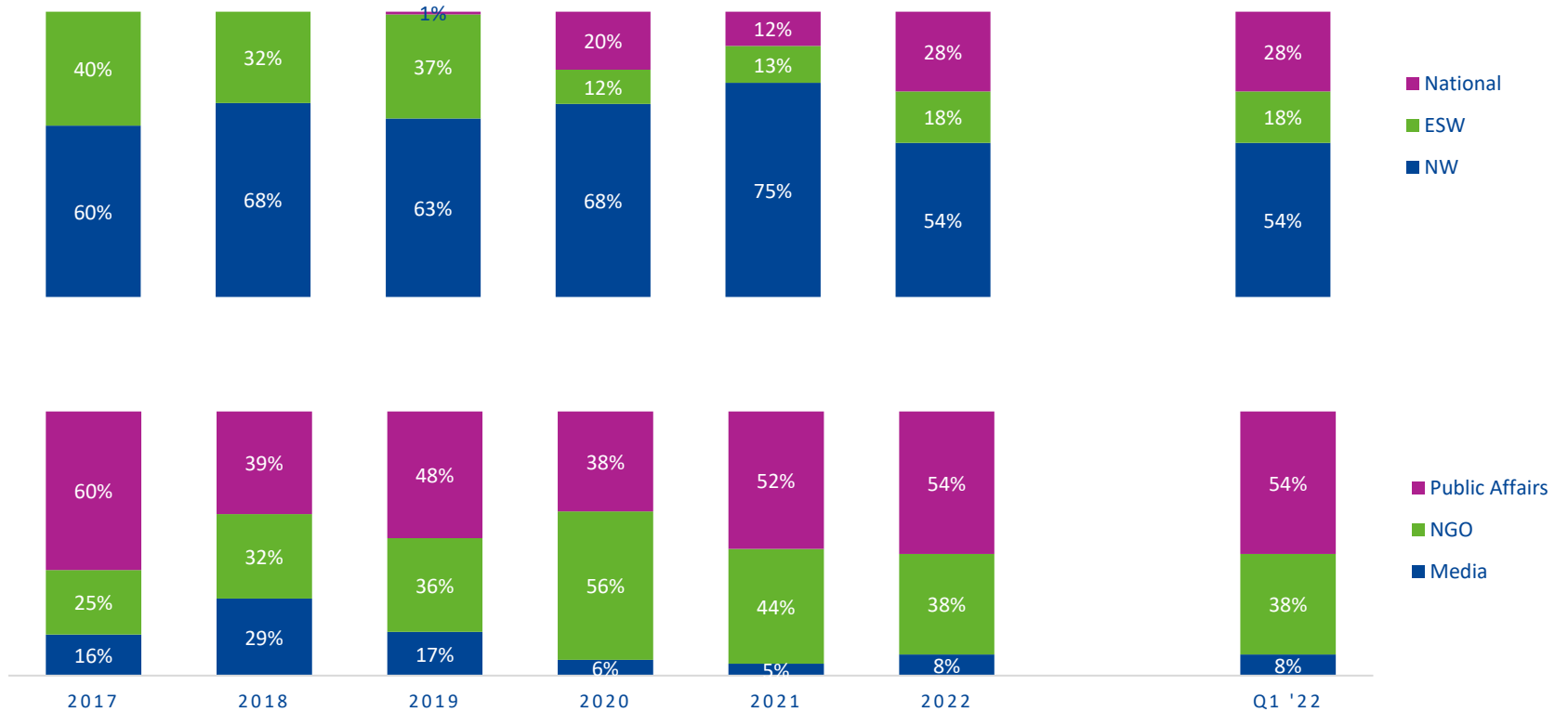
- Providing affordable and inclusive services (7.7), an increase of 2.4
- Providing an unrivalled customer experience (7.3), an increase of 1.8
- Trusting we work with others to improve the environment (8.3), an increase of 1.5
- 4 Leading in tackling leakage (7.8), an increase of 1.3
- Leading in innovation (8.3), an increase of 1.0

SAMPLE PROFILE

STAKEHOLDER TRACKING – Q1 2022

SAMPLE PROFILE

Variation in the profile from year to year



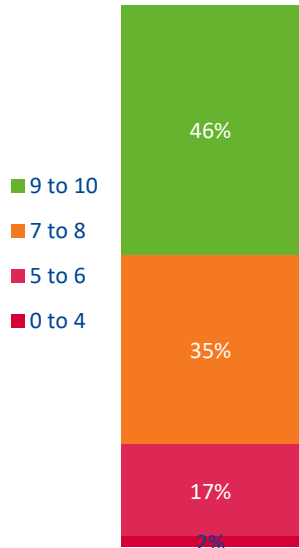
SATISFACTION

WITH TRUST, OVERALL SATISFACTION AND BRAND VALUES

STAKEHOLDER TRACKING – Q1 2022

TRUST

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



Mean score: 8.0

Region	NW (25)	8.0
	ESW (9)	7.9
	National (14)	8.1
Type	Public Affairs (25)	7.9
	NGO (19)	8.1
	Media (4)	8.0

Comment themes for reasons for trust score

Honest, open,
transparent (11)

Service is
responsive – quick
to resolve issues
(7)

No reason not to
trust them - they
are trustworthy (7)

Good reputation -
no adverse
publicity (6)

They do what they
say they're going
to do - keep their
promises (5)

Good ethos,
ethics, values (5)

Do a good job, do
a lot of work (5)

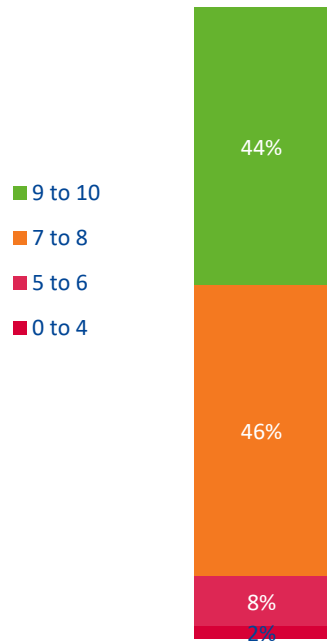
Good experience
with them (5)

Q7g: Thinking about your overall impressions of [NW/ESW/NWG], to what extent would you agree or disagree with the following statements? They are a company that you can trust. Q8 In relation to the statement 'They are a company that you can trust', you [gave a score of .../couldn't give a score out of 10]. Why is that? Q8: Reason for trust score.

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OVERALL SATISFACTION

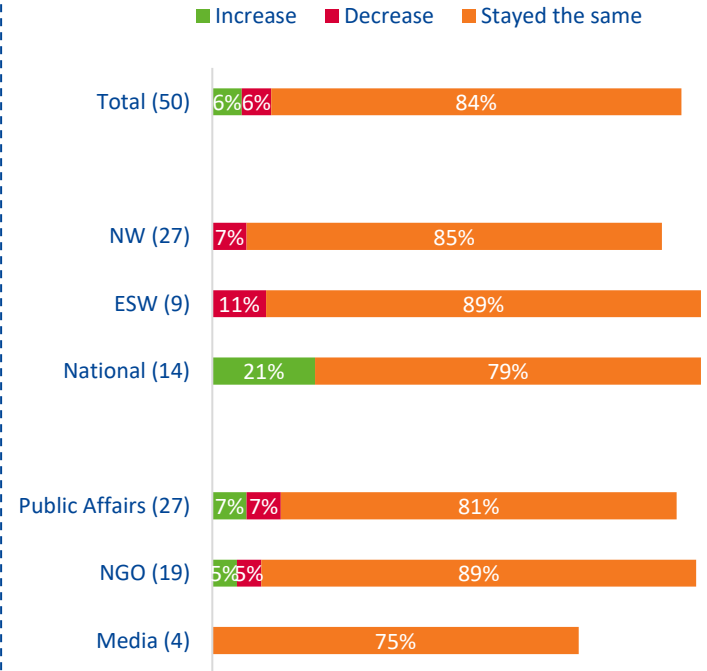
How satisfied are you overall with NWG
(10 = very satisfied, 0 = very dissatisfied)



Mean score: 8.1

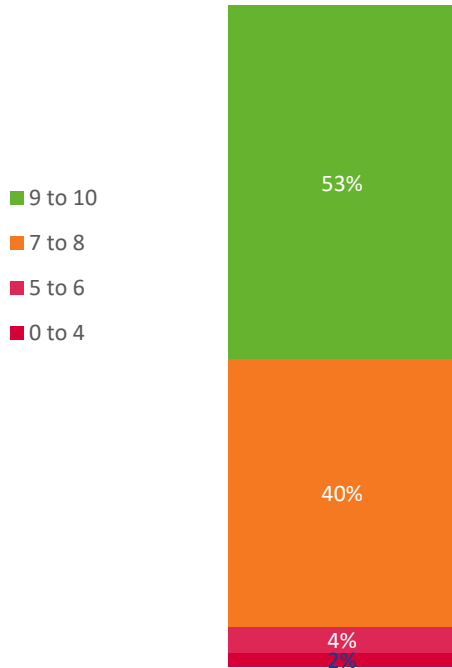
		Score
Region	NW (26)	8.2
	ESW (9)	7.9
	National (13)	8.2
Type	Public Affairs (25)	8.0
	NGO (19)	8.4
	Media (4)	8.3

Overall satisfaction change over the last year



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SATISFACTION WITH MOST RECENT CONTACT



Mean score: 8.5

Region	NW (25)	8.4
	ESW (8)	8.0
	National (12)	9.0
Type	Public Affairs (23)	8.7
	NGO (19)	8.2
	Media (3)	8.7

One stakeholder commented on why they scored low:

“They won't engage or answer the questions. We are a big landowner and they have a huge amount of equipment on our land and it is continually bursting, breaks and explodes, both clean water and drainage.

The infrastructure is substandard and they do not reinvest. The only time we get a sensible response is when you take them to court.”

NGO, NW (score 0)

STAKEHOLDER TRACKING – Q1 2022

BRAND VALUES – PROGRESS MONITORING

Brand values	2017	2018	2019	2020	2021	2022 YTD	Q1 '22	
Provide an unrivalled customer experience	7.8	8.0	7.1	7.6	7.5	7.2	7.2	Lowest scoring Public Affairs at 6.8
Provide affordable and inclusive services			7.5	8.2	8.1	7.4	7.4	
Provide reliable and resilient services			8.2	8.5	8.2	7.7	7.7	
Leading in innovation	7.6	7.9	7.3	8.4	8.2	7.9	7.9	Lowest scoring Media at 6.0 Highest scoring ESW at 8.3
Trusted to work with others to improve the environment	7.9	8.2	8.0	8.8	8.3	7.9	7.9	Highest scoring ESW at 8.3
Contribute to building a successful economy in the region			7.8	8.5	8.2	7.7	7.7	
Company you can trust	8.1	8.2	8.2	8.7	8.5	8.0	8.0	
Leading company in tackling leakage			7.6	7.8	7.5	6.9	6.9	Lowest scoring NGO at 6.5 Highest scoring ESW/Media both at 7.8
Working to improve environmental impact for customers/communities – now						7.7	7.7	Highest scoring NGO at 8.0
Working to improve environmental impact for customers/communities – for future generations						7.8	7.8	Highest scoring NGO at 8.2

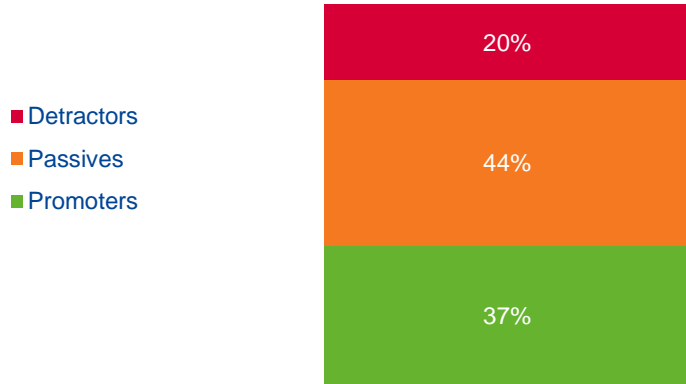
NPS

STAKEHOLDER TRACKING – Q1 2022

NPS

Likelihood to recommend NWG

(Score range: Detractor 0-6; Passive 7-8; Promoter 9-10)



Overall NPS: 17.1

Region	NW (22)	22.7
	ESW (8)	25.0
	National (11)	0.0
Type	Public Affairs (20)	0.0
	NGO (17)	29.4
	Media (4)	50.0

STAKEHOLDER TRACKING – Q1 2022

NPS – COMMENT THEMES

PROMOTERS

- Happy with the service (5)
- Professional/efficient (3)
- Water quality is good (3)
- Customer focussed (3)
- Supply is reliable/consistent (2)
- Good experience with them (2)

PASSIVES

- No problems – happy with the service (4)
- Good experience with them (4)
- Professional/efficient (3)
- Good working relationship (2)
- Always room for improvement (2)
- Can't make comparison – no real choice of supplier (2)
- Better communications required, including notice of works (2)
- It's a monopoly (2)
- Should be more responsive/quicker to resolve issues (2)
- Customer focused (2)
- Do a good job (2)

DETRACTORS

- Would not/no need to recommend – up to the individual (2)
- Little/no contact – don't know enough about them (2)
- Don't think about it (2)

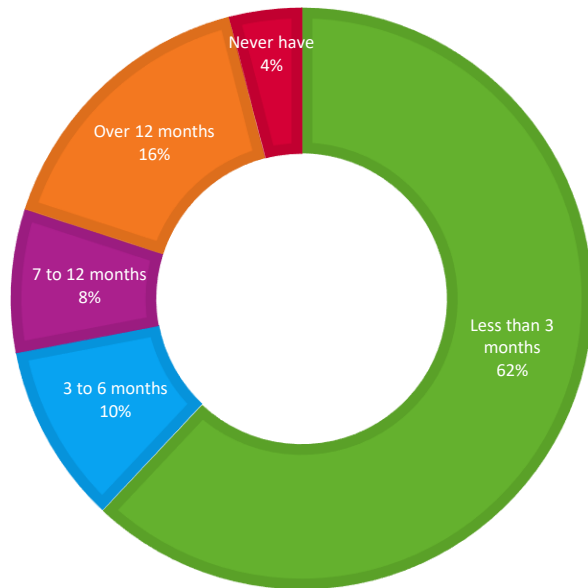
CONTACT

MOST RECENT CONTACT, CHANNEL, SUPPLIED WITH ALL INFORMATION WANTED, AND PREFERRED CHANNEL FOR REGULAR INFORMATION

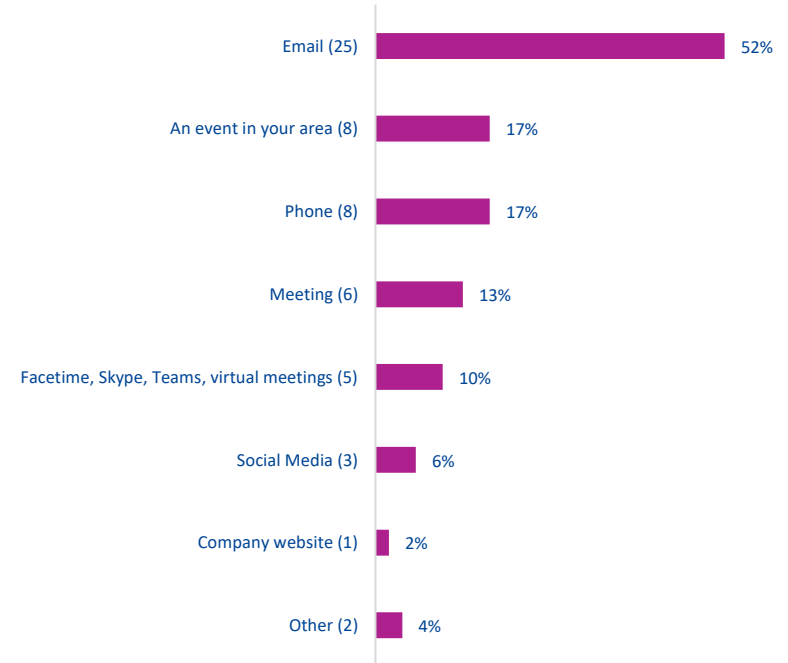
STAKEHOLDER TRACKING – Q1 2022

CONTACT

Most recent contact with NWG



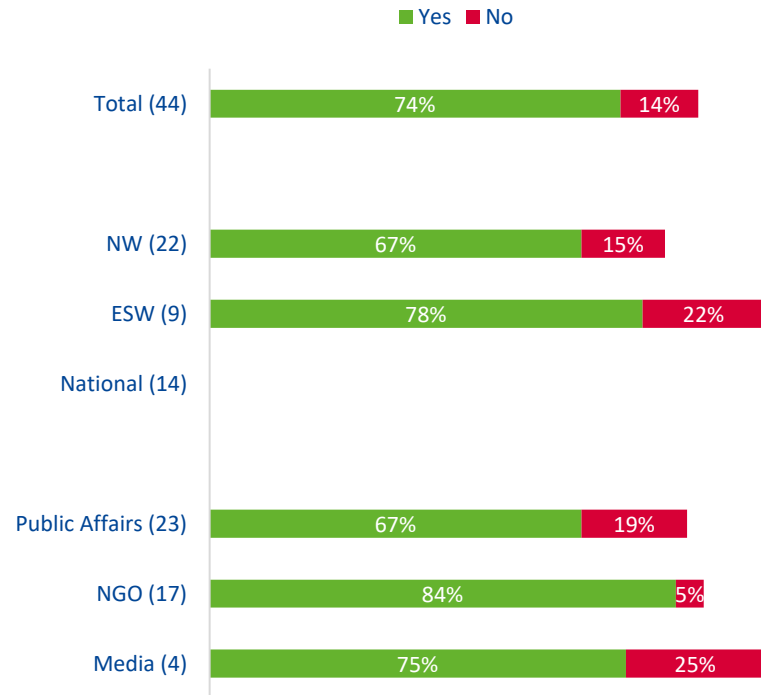
Channel of most recent contact



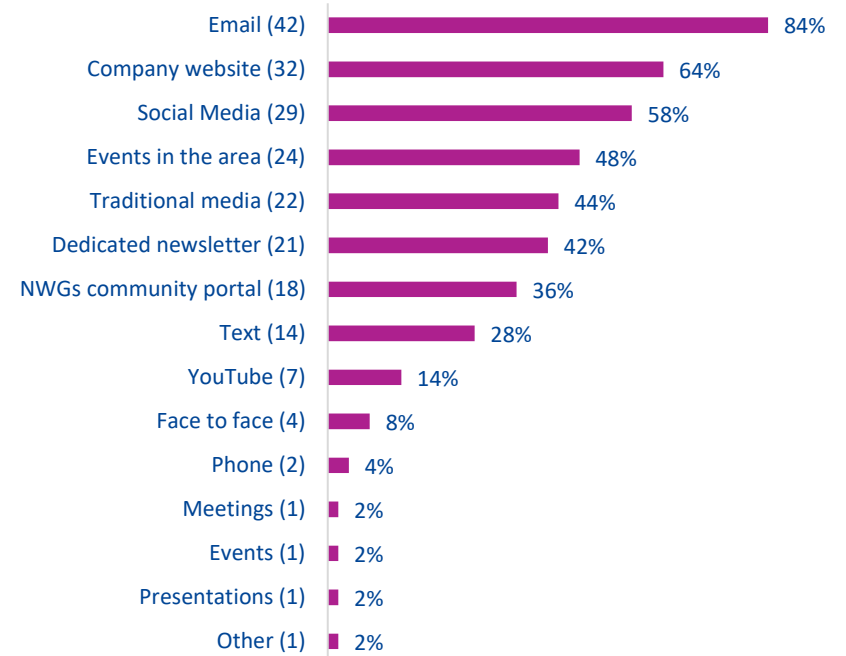
STAKEHOLDER TRACKING – Q1 2022

INFORMATION

Supplied with all the information wanted to feel informed



Preferred channel(s) for regular information (prompted)



MOVING ANNUAL AVERAGES COMPARISON

(MAA)

STAKEHOLDER TRACKING – Q1 2022 MOVING ANNUAL AVERAGES

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. Therefore, a MAA has been included 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 four quarters up to and including that wave. This gives a 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.

STAKEHOLDER TRACKING – Q1 2022

TRUST

The moving annual average was stable in 2021, we have seen a drop overall in Q1 2022. The lowest scoring area being ESW and Media, but it's worth noting that this is due to the low number of responses in these two areas

MAA 12 months to:		Q1 '18	Q2 '18	Q3 '18	Q4 '18	Q1 '19	Q2 '19	Q3 '19	Q4 '19	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22
Region	Total	8.1	8.2	8.3	8.2	8.2	8.2	8.1	8.2	8.3	8.5	8.6	8.7	8.7	8.6	8.6	8.5	8.3
	NW	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	8.6	8.6	8.5	8.4
	ESW	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	8.1	8.0	8.0	8.0
Type	Public	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	8.3	8.3	8.3	8.2
	NGO	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	8.9	8.8	8.8	8.5
	Media	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	7.8	8.4	8.1	8.0

Significantly higher/lower

STAKEHOLDER TRACKING – Q1 2022

OVERALL SATISFACTION

The trend remains broadly steady, although there is an increase in the Media MAA in Q1 2022

MAA		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
12 months to:		'18	'18	'18	'18	'19	'19	'19	'19	'20	'20	'20	'20	'21	'21	'21	'21	'22
Region	Total	8.3	8.3	8.4	8.4	8.3	8.3	8.3	8.3	8.4	8.6	8.7	8.7	8.6	8.5	8.5	8.5	8.4
	NW	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	8.5	8.5	8.5	8.4
	ESW	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	8.3	8.3	8.1	8.0
Type	Public	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	8.3	8.5	8.4	8.4
	NGO	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	8.7	8.6	8.6	8.5
	Media	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	8.0	8.3	7.3	7.5

  Significantly higher/lower

STAKEHOLDER TRACKING – Q1 2022

NPS

Although the overall NPS has fallen slightly in Q1 2022, it remains higher than it was in 2018 and 2019. Again, expect this number to change once the quota has been achieved for all the region and stakeholder types

MAA	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	
12 months to:	'18	'18	'18	'18	'19	'19	'19	'19	'20	'20	'20	'20	'21	'21	'21	'21	'22	
Region	Total	29.4	30.2	31.8	29.2	27.4	27.2	28.7	23.0	24.2	33.9	36.9	43.8	44.6	42.0	39.1	40.4	35.1
	NW	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	43.7	40.2	43.2	38.2
	ESW	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	4.0	12.0	12.0	21.7
Type	Public	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	31.6	34.9	39.1	36.0
	NGO	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	52.8	45.8	44.9	35.9
	Media	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	16.7	12.5	12.5	20.0

  Significantly higher/lower

STAKEHOLDER TRACKING – Q1 2022

CONTACT

The overall moving annual average remains consistent, and we see a slight increase in Public Affairs

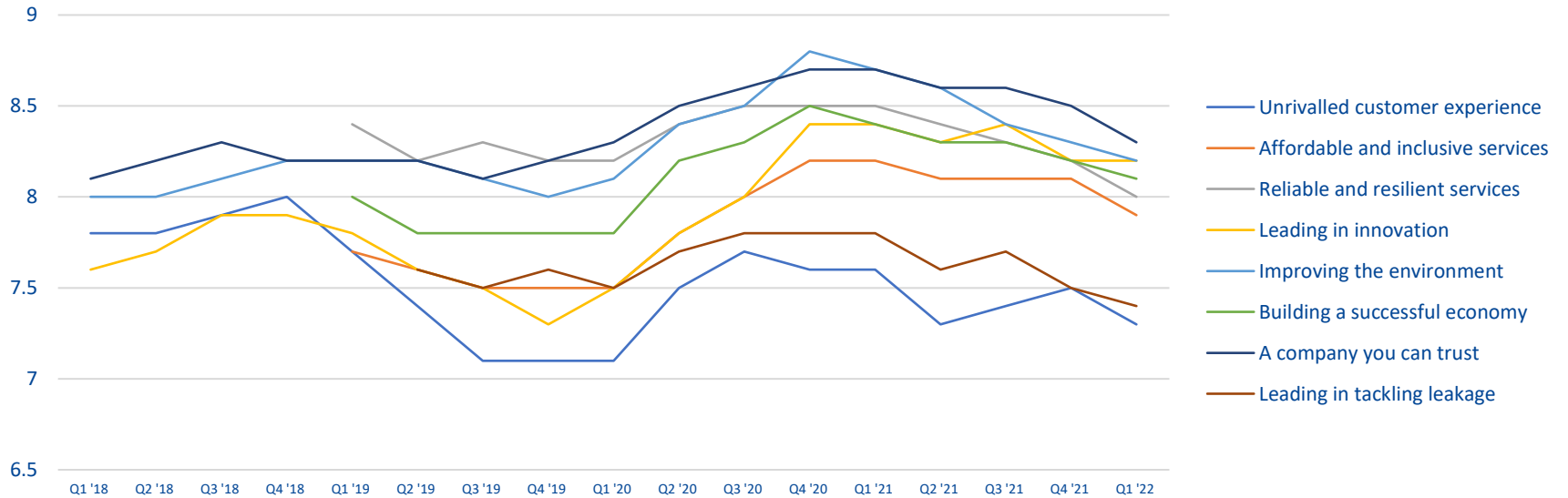
MAA 12 months to:		Q1 '19	Q2 '19	Q3 '19	Q4 '19	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22
Region	Total	8.5	8.5	8.5	8.5	8.6	8.7	8.8	8.8	8.8	8.8	8.8	8.8	8.8
	NW	8.6	8.5	8.5	8.5	8.6	8.7	8.8	8.8	8.8	8.8	8.8	8.9	8.8
	ESW	8.5	8.4	8.4	8.4	8.2	8.1	8.2	8.0	8.2	8.3	8.2	8.3	8.2
Type	Public	8.4	8.6	8.5	8.4	8.4	8.5	8.6	8.8	8.7	8.7	8.8	8.7	8.8
	NGO	8.6	8.5	8.6	8.7	8.8	8.9	8.9	8.9	8.9	8.9	8.8	8.9	8.7
	Media	8.6	8.2	8.1	8.4	8.3	8.5	8.6	8.3	8.4	8.5	9.0	9.0	8.9

 Significantly higher/lower

STAKEHOLDER TRACKING – Q1 2022

BRAND VALUES

With the exception of leading in innovation which remains the same as Q4 2021 (8.2), the moving annual averages continue showing downward trend



TAP OR BOTTLED WATER PREFERENCE

STAKEHOLDERS WHO ARE ALSO DOMESTIC CUSTOMERS

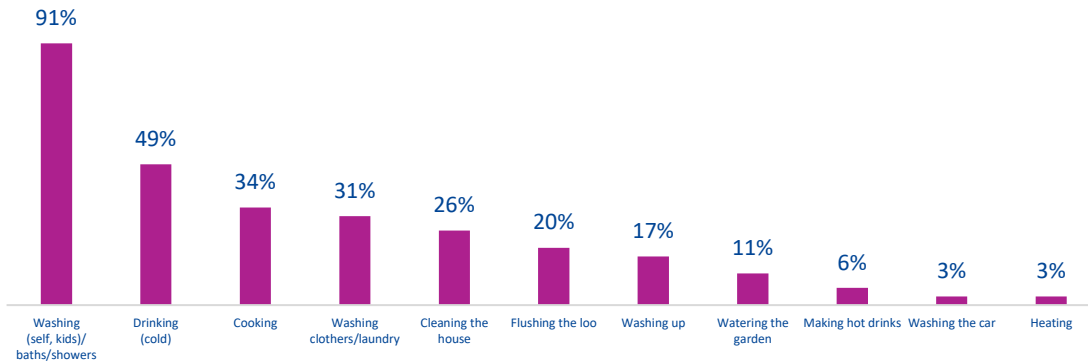
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TAP OR BOTTLED WATER PREFERENCE

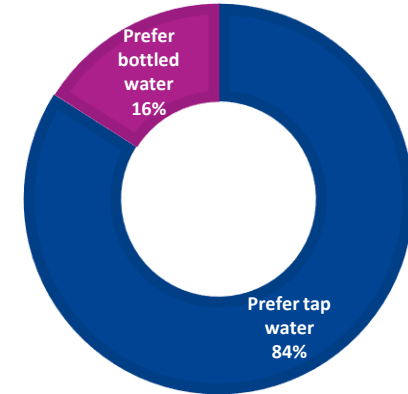
70% of stakeholders are supplied by NW or ESW at home

Satisfaction with domestic supply	2021	2022 YTD	Q1 '22
Supply clean and clear drinking water	9.2	9.2	9.2
Supply drinking water that tastes and smells good	8.9	9.0	9.0
Provide a reliable supply of water	9.4	9.5	9.5
Provide sufficient pressure	9.0	9.2	9.2

First three things that come to mind when using tap water at home



Stakeholders who are supplied water at home who prefer tap water to bottled water



Region	NW (19)	90%
	ESW (3)	60%
	National (5)	83%
Type	Public Affairs (12)	86%
	NGO (13)	87%
	Media (2)	67%

APRIL 2022

The background features a gradient from dark blue at the top to light green at the bottom. A large, dark blue, wavy shape curves across the lower half of the page. Overlapping this shape are several thin, parallel, light green lines that create a sense of motion or depth. A thin white horizontal line is positioned near the top of the page.