



04 / 06 / 20

Stakeholder Tracker

Results: Quarter 2 2020

Our ref. J3069.1



DEFINING THE **CLEAREST** DIRECTION

A

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

A

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

Qtr2 2020

Fieldwork carried out:

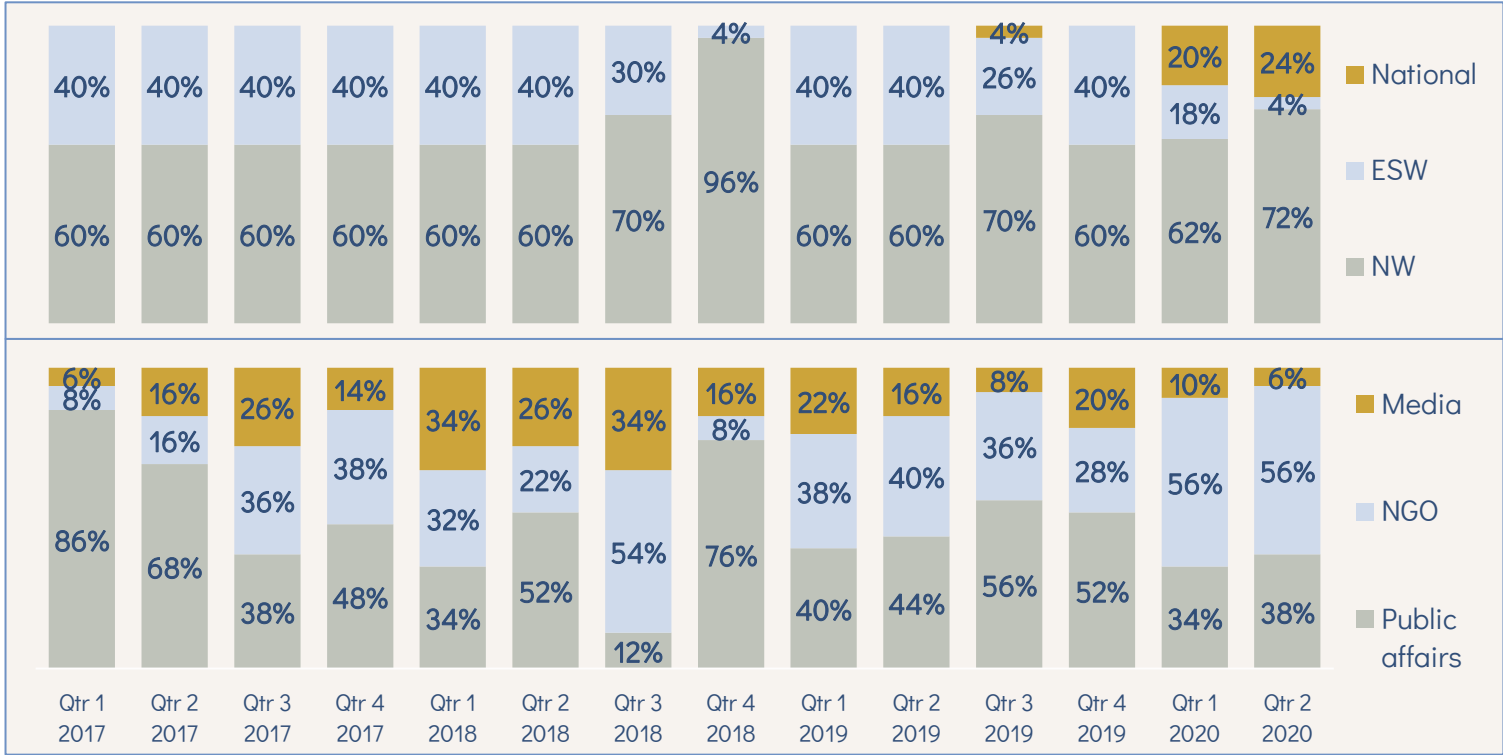
19 - 29 May 2020

Due to the Covid-19 lockdown, only stakeholders for whom we had mobile phone numbers could be used

This is the first wave carried out by Allto. 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

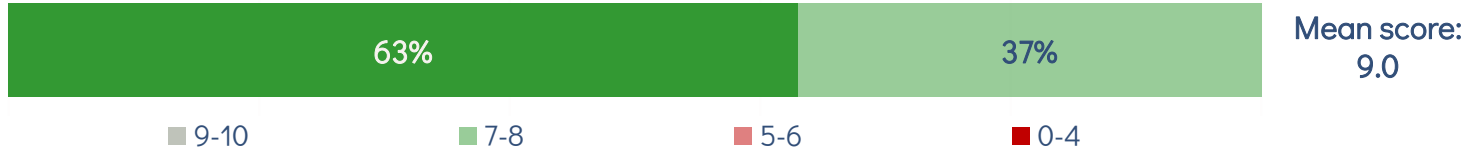


(Qtr4 '18 – 25 interviews)



Trust

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



Base: all respondents, where answer given (48)

Region	NW (34)	9.0
	ESW (2)	8.5
	National (12)	9.0
Type	Public affairs (19)	8.7
	NGO (27)	9.1
	Media (2)	9.5

The confidence that I have in the company has grown over the last few years from what it was, it's actually moving with the times. They are using lots of social media for information, actively passing information on and this has helped with that confidence building

The particular contact that we have in the field I work in is accurate, timely, proactive, thorough, and they act on initiative. Really good

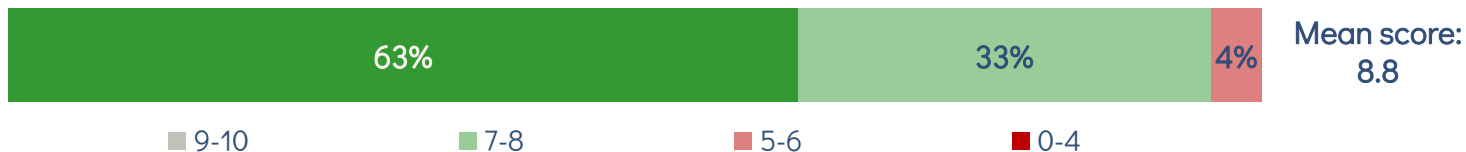
I think they are very open in their communications. Their senior officers are very visible in events and are open to discussion. They are good to collaborate with, to solve challenges, they are open to things they find difficult rather than hiding things

I think in my interactions with them, they always seem honest, open, willing to listen and in my experience, this, what you are doing now, is an example of how they want to engage with stakeholders. And with it being a water company, where you don't have a choice, they still do it. Which says a lot because they don't have to do it but they still do



Overall satisfaction

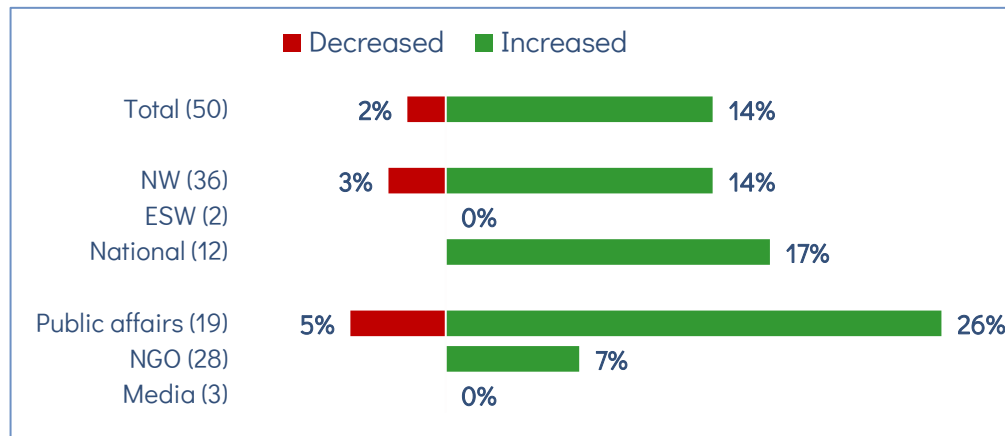
How satisfied are you overall with NWG (10 = very satisfied, 0 = very dissatisfied)



Base: all respondents, where answer given (49)

Region	NW (35)	8.8
	ESW (2)	8.0
	National (12)	9.1
Type	Public affairs (19)	8.6
	NGO (27)	9.0
	Media (3)	8.7

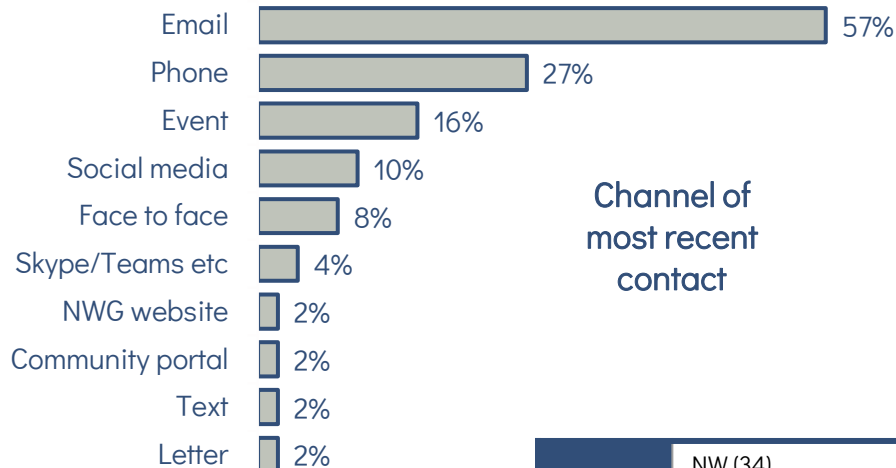
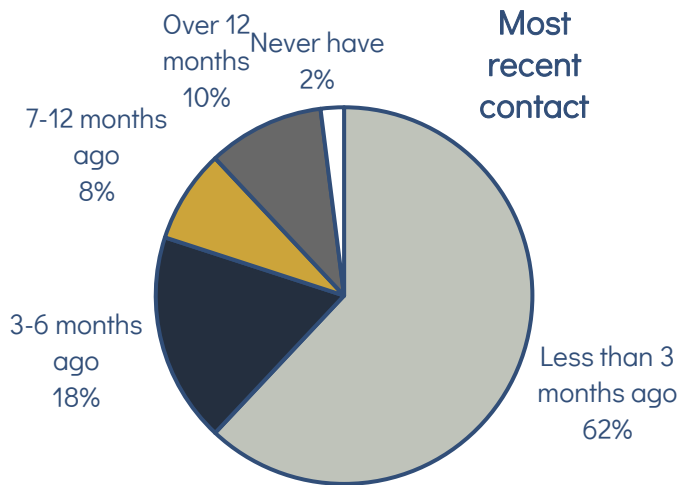
Overall satisfaction change over the last year



Base: all respondents (as shown)



Contact



	Count	Score
Region	NW (34)	8.9
	ESW (2)	8.0
	National (12)	8.9
Type	Public affairs (17)	8.9
	NGO (28)	8.9
	Media (3)	8.3

Satisfaction with most recent contact

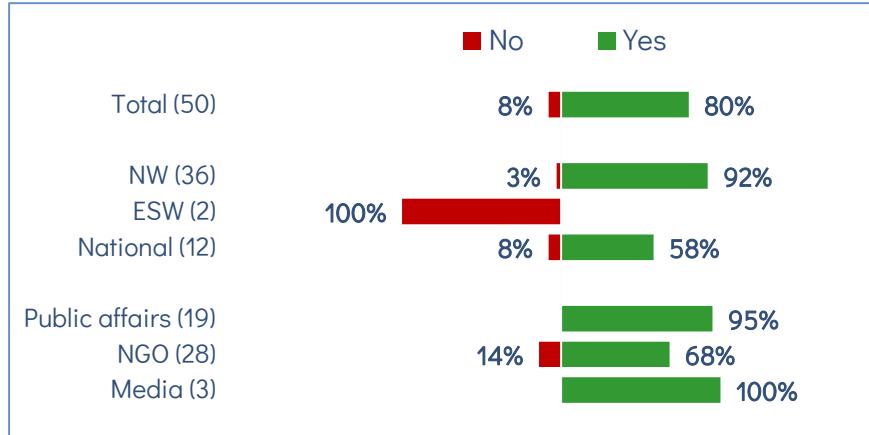


Base: have had contact, where answer given (48)

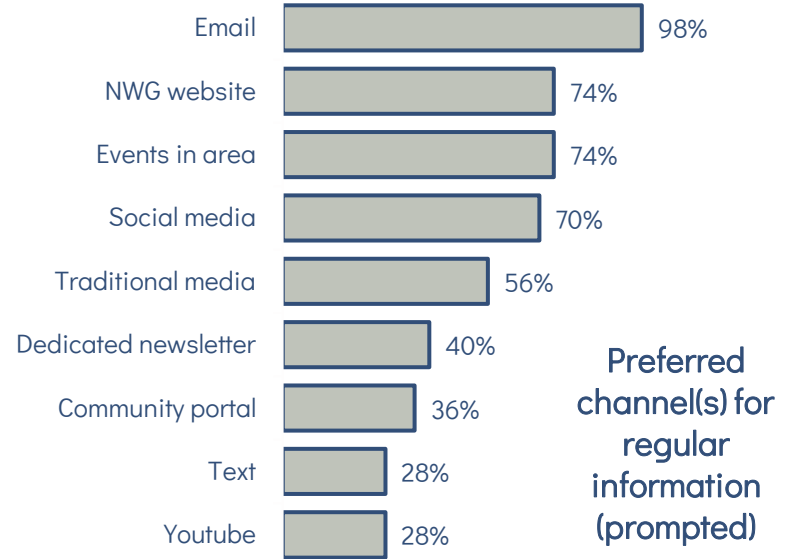
A

Information

Been supplied with all the info wanted



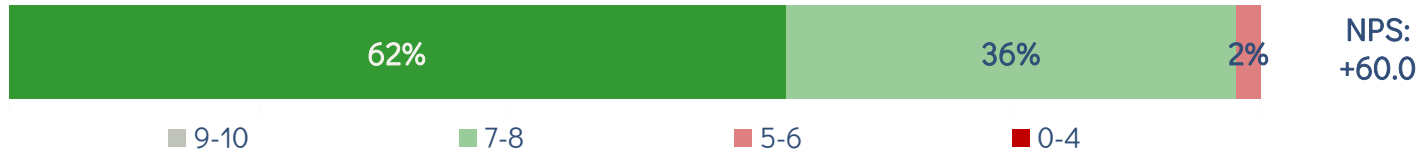
Base: all respondents (as shown)





NPS

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



Base: all respondents, where answer given (45)

Region	NW (32)	+62.5
	ESW (2)	0.0
	National (11)	+63.6
Type	Public affairs (18)	+50.0
	NGO (26)	+69.2
	Media (1)	0.0

I've known about the company for about 15/16 years and I think they have demonstrated time and time again that not only do they care about the quality of the service they provide, but they invest in the community and in the infrastructure

They appear to be one of the better UK companies in terms of how they engage with customers and the supply chain. I know they are in the top of the league tables for environmental consideration

I see them respond very well when there's an issue and they want to put things right but I don't necessarily see a long-term investment plan around resolving it

They do want to engage in working partnerships beyond the statutory requirement so we can see the evidence in the partnership working. There is work that they could do and deliver on in the next asset period and so we will all see how that pans out

The people that work there seem to be committed to working there, which says a lot about what sort of place it is

A

Brand values – progress monitoring

Brand values	2017 total	2018 total	2019 total	2020 YTD	2020 Q1	2020 Q2	2020 Q3	2020 Q4
Provide an unrivalled customer experience	7.8	8.0	7.1	8.0	7.7	8.2		
Provide affordable and inclusive services			7.5	8.2	7.8	8.5		
Provide reliable and resilient services			8.2	8.5	8.3	8.8		
Leading in innovation	7.6	7.9	7.3	8.3	8.3	8.4		
Trust they work with others to improve the environment	7.9	8.2	8.0	8.8	8.5	9.0		
Company you can trust	8.1	8.2	8.2	8.8	8.6	9.0		
Leading company in tackling leakage			7.6	7.8	7.4	8.2		



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.

A →

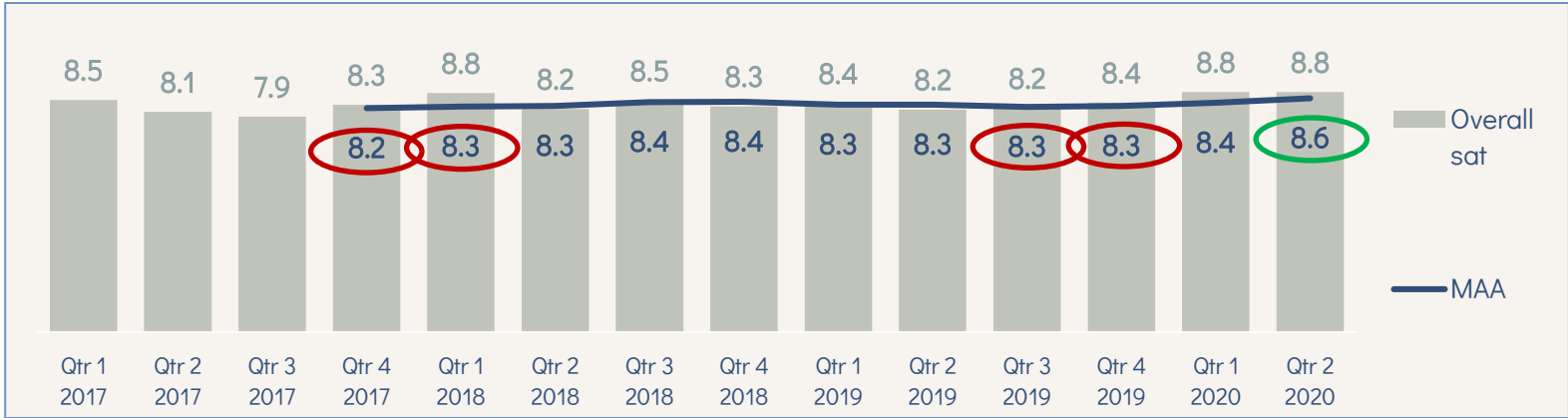
Trust – the moving annual average has been on a plateau, but looks now to be trending upwards. ESW typically lags behind NW; NGOs show the highest levels



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
Region	NW	8.3	8.4	8.5	8.4	8.3	8.3	8.2	8.2	8.2	8.3	8.6
	ESW	7.7	7.7	7.8	7.9	8.1	7.9	8.2	8.1	8.1	8.0	7.9
Type	Public	7.9	7.7	8.0	8.0	8.1	8.3	8.2	8.0	8.2	8.1	8.3
	NGO	8.5	8.7	8.4	8.4	8.3	8.0	8.3	8.3	8.3	8.6	8.7
	Media	8.0	8.3	8.2	8.4	8.3	8.2	8.2	8.1	7.9	7.7	7.9



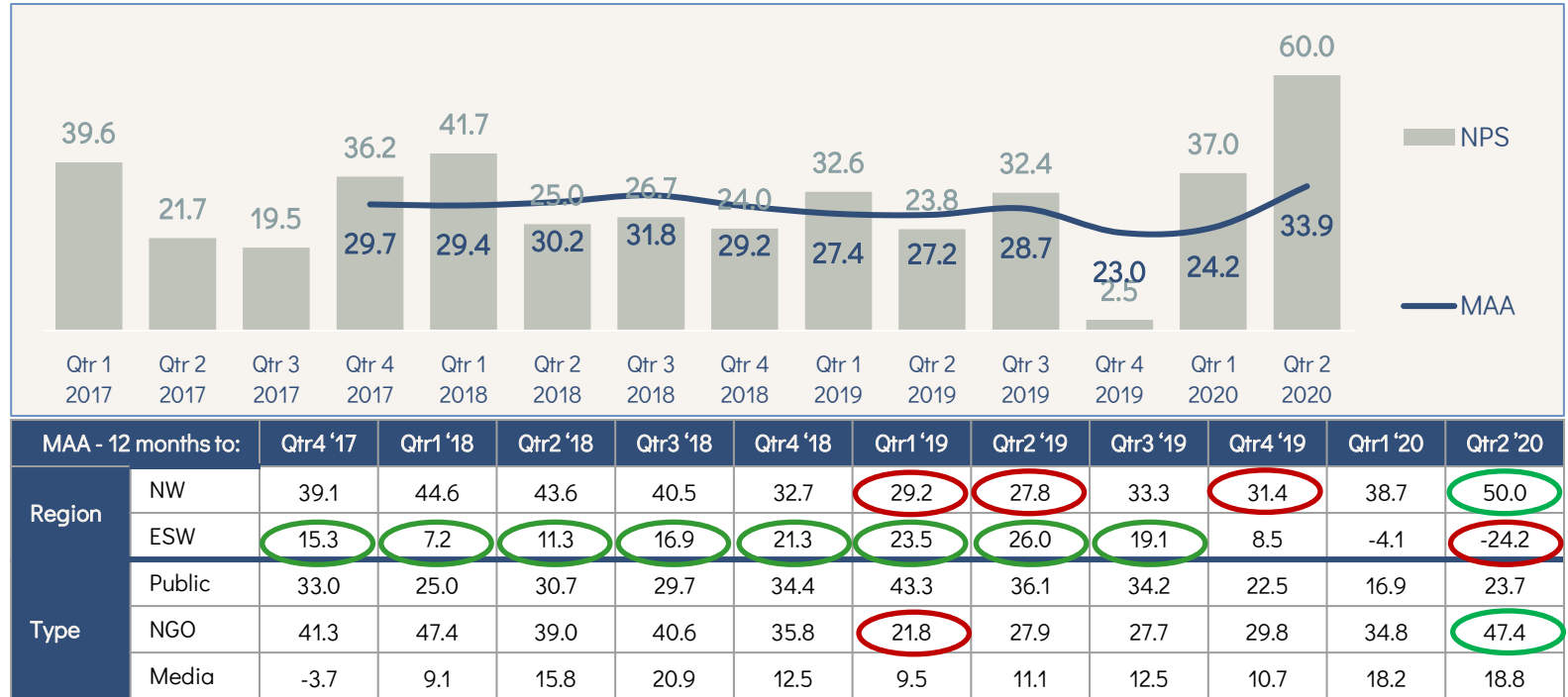
Overall satisfaction – also trending upwards in recent quarters



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
Region	NW	8.4	8.5	8.5	8.6	8.5	8.3	8.3	8.3	8.3	8.5	8.7
	ESW	7.9	7.9	7.9	8.2	8.4	8.4	8.4	8.2	8.3	8.1	8.1
Type	Public	8.2	8.0	8.1	8.2	8.4	8.4	8.4	8.3	8.3	8.3	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
	Media	8.0	8.3	8.2	8.4	8.3	8.3	8.1	7.9	8.1	8.1	8.6

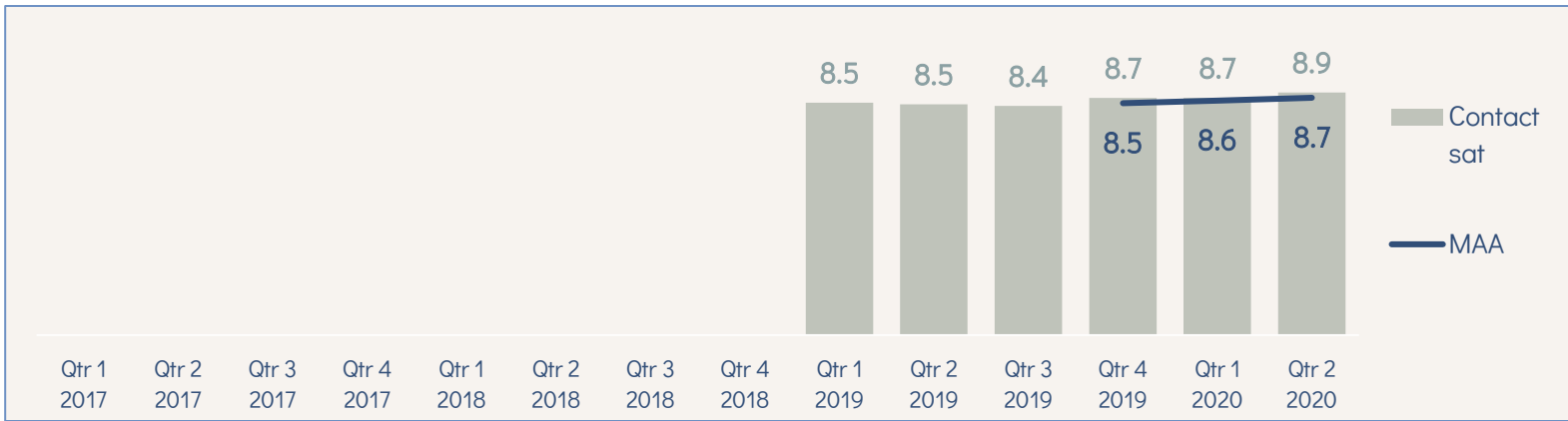
A

The NPS measure itself is volatile, so the moving annual average also swings up and down





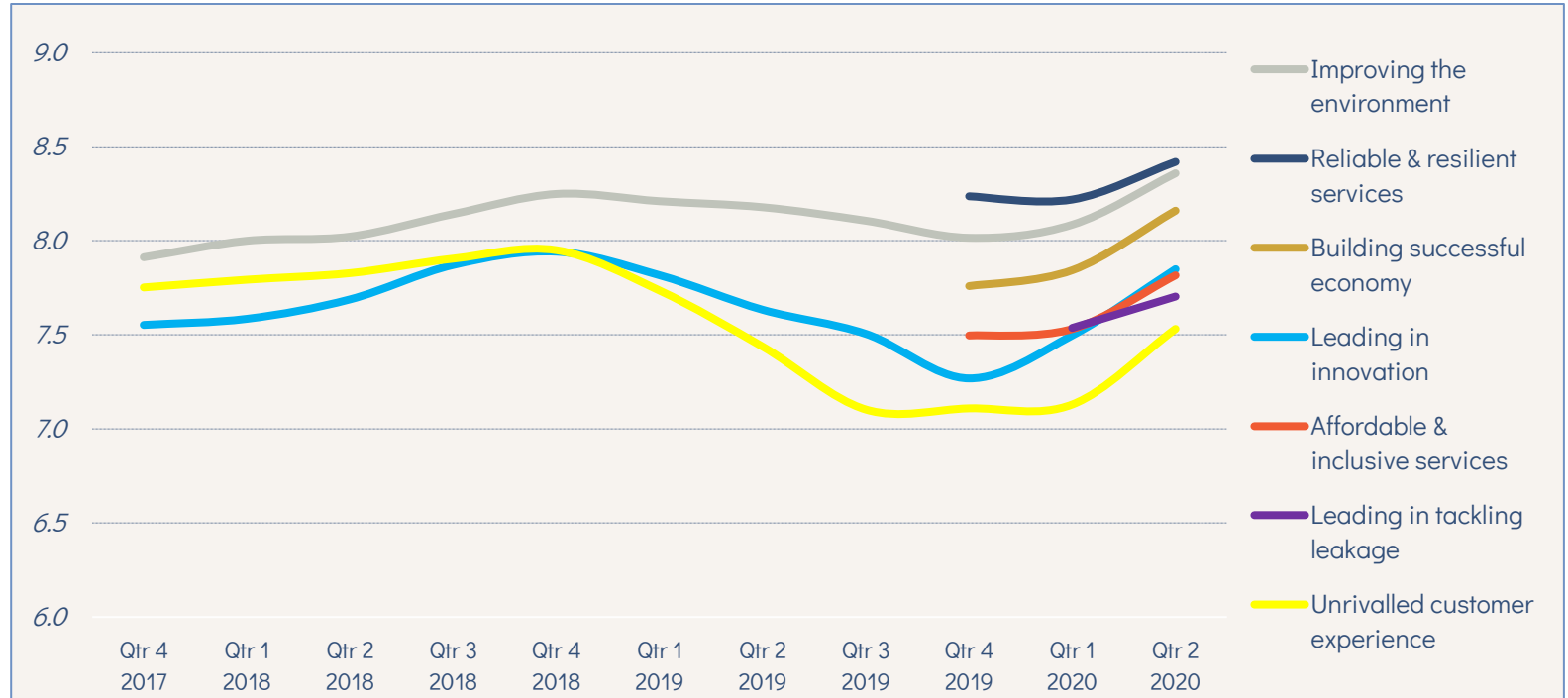
The contact satisfaction moving annual average is trending upwards – but not in ESW



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
Region	NW									8.5	8.6	8.7
	ESW									8.4	8.2	8.1
Type	Public									8.4	8.4	8.5
	NGO									8.7	8.8	8.9
	Media									8.4	8.3	8.5

A

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





DEFINING THE **CLEAREST** DIRECTION

TELEPHONE | +44 (0)113 237 5590

WEBSITE | www.allto.co.uk

ADDRESS | 23 Harrogate Road, Chapel Allerton, Leeds, LS7 3PD

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

