

STAKEHOLDER RESEARCH TRACKING

Q1 2023

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STAKEHOLDER TRACKING – Q1 2023

INTRODUCTION

This is an ongoing research programme with NWG’s key stakeholders, tracking key measures to understand the satisfaction with engagement with this group.

- 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: 27 February to 24 March.
- Average interview length: 11 minutes.

Type of business	Number of interviews
Public Affairs	30
NGO	18
Media	2

Topics discussed cover:

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

Location	Number of interviews
NWG	50
NW	31
ESW	11
National	8

STAKEHOLDER TRACKING – Q1 2023

SUMMARY

Overall trust remains consistent at 8.1 and scores 0.1 above the total score for 2022. NW contacts scored highest at 8.4, followed by both ESW and national contacts both scoring 7.5. Media contacts scored highest in Q1 (8.5), followed by public affairs (8.2), NGOs although lower than the other stakeholder types still scored higher than ESW and national with a score of 7.8. There were fewer comments made about reason for the score for trust, with the main focus of comments being receiving better communications and provision of information. A new theme for Q1 was NWG award wins and high scores from regulators.

Although we see a decline in overall NPS compared to Q4 2022, the score of 20.8 for Q1 2023 is 3.7 higher than we saw for the whole of 2022 (17.9). NW contacts (34.5) scored the highest in Q1 with both ESW and national contacts scoring 0.0. This is still 6.5 higher than the total for 2022 for ESW where the annual score was -6.5. Public affairs contacts scored highest in Q1 (25.0) followed by NGOs (16.7) and then media (0.0). The percentage of Promoters has remained consistent with Q4 2022 at 40%, and we see a drop in Passives which has meant an increase in the number of Detractors this phase. Here's some information about why the different NPS groups score as they do.

- Promoters - experience no problems and are happy with the service, NWG being a monopoly and being a customer for many years. Good communications and having a regional presence/engagement and supporting communities was also mentioned.
- Passives - they experience no problems and are happy with the service, that we are a good company, but do need to improve environmental work. They indicate NWG is professional and efficient and the service is responsive and quick to resolve issues. Two contacts mentioned environment work such as rainwater harvesting.
- Detractors - indicated that they would not recommend and that NWG is neither good nor bad.

Overall satisfaction declined 0.2 to 8.1, this score is equal to the overall score for 2022. 76% indicated that their satisfaction change over the last year had stayed the same with 14% indicating a decrease and others a 10% increase. Those more likely to have indicated a satisfaction decrease are NGOs (22%), ESW (18%), NW (16%) and public affairs (10%) contacts. The largest increase in satisfaction change was for national contacts (25%), and we see a 18% increase for ESW contacts too.

Over half (56%) said that their most recent contact was less than three months ago, with email (72%) being the channel of contact which has increased by 5% from Q4 2022.

Email continues to be the preferred channel for receiving regular information. In addition to the usual channels, there were mentions of subject specific/interactive workshops and using third parties in Q1.

One stakeholder contact requested a call back after their telephone interview to discuss reinstatement of some works that hadn't been completed a satisfactory standard. This was passed to the Partnerships team to deal with at the time it was received.

PROFILE

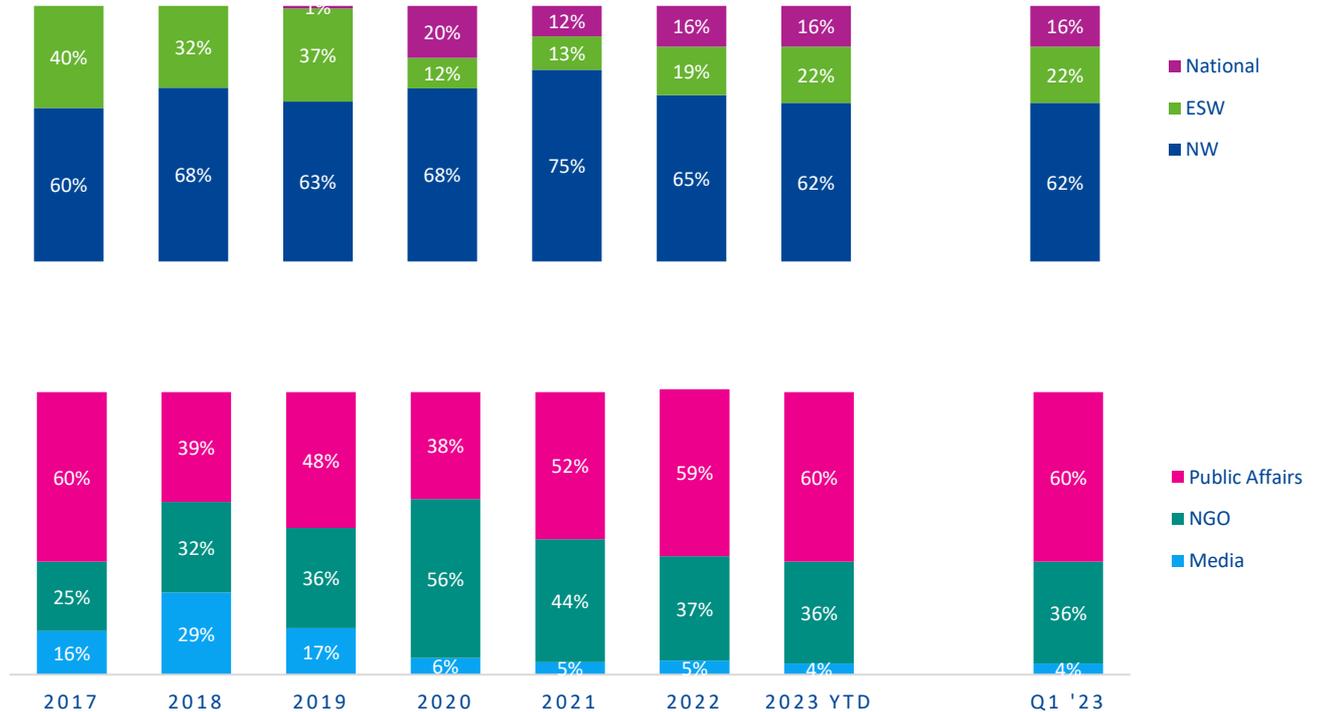
STAKEHOLDER TRACKING – Q1 2023 PROFILE

Below is some feedback from Trinity McQueen on the database provided for Q1:

- There was a high number of duplicate contact numbers ie 338, leaving 770 records.
- Mobiles were much more effective than landlines for reaching the named person (strike rate of 3:1 on mobiles vs 26:1 on landlines).
- Some respondents said they weren't a stakeholder with NWG so didn't qualify for the interview.
- There were quite a high number of invalid numbers ie 24.3% of all the records that were called. The media contacts performed the worst at 43:1 strike rate, compared to 9:1 for NGO and 5:1 public affairs.

To help with future quota targets, if possible:

- Higher number of contacts.
- Less duplicate contact numbers.
- Higher number of mobile numbers.



QUARTERLY/ANNUAL PROGRESS MONITORING

NWG, ESW, NW, NATIONAL

STAKEHOLDER TRACKING – Q1 2023

PROGRESS MONITORING – NWG/ESW

NWG Target 8.9

STAKEHOLDER - NWG	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22	Qtr3 '22	Qtr4 '22	Qtr1 '23		2017	2018	2019	2020	2021	2022	2023 YTD	
Base:	50	50	50	51	50	50	50	50	50	50	50	50	50		200	200	200	201	200	200	50	
NPS	37.0	60.0	44.4	32.5	40.0	50.0	33.3	38.6	17.1	-6.4	33.3	26.7	20.8	-5.9	29.7	29.2	23.0	43.8	40.5	17.1	20.8	+3.7
Overall satisfaction	8.8	8.8	8.6	8.4	8.5	8.5	8.7	8.1	8.1	7.9	8.1	8.3	8.1	-0.2	8.2	8.4	8.3	8.7	8.5	8.1	8.1	0.0
Satisfaction with most recent contact	8.7	8.9	8.8	8.9	8.6	8.9	8.8	8.9	8.5	8.2	8.7	8.6	8.3	-0.3			8.5	8.8	8.8	8.5	8.3	-0.2
NWG has provided all information wanted	90%	80%	84%	75%	92%	80%	76%	74%	74%	74%	80%	84%	78%	-6%	80%	83%	81%	82%	81%	78%	78%	0%
BRAND VALUES AGREEMENT:																						
They provide an unrivalled customer experience	7.7	8.2	7.2	7.1	7.8	7.0	7.9	7.3	7.2	6.5	7.8	6.9	6.9	0.0	7.8	8.0	7.1	7.6	7.5	7.1	6.9	-0.2
They provide affordable and inclusive services	7.8	8.5	8.2	8.0	8.1	8.3	8.0	7.8	7.4	7.2	8.2	7.6	7.3	-0.3			7.5	8.2	8.1	7.6	7.3	-0.3
They provide reliable and resilient services	8.3	8.8	8.5	8.2	8.6	8.2	8.2	7.9	7.7	7.2	8.2	8.1	7.8	-0.3			8.2	8.5	8.2	7.8	7.8	0.0
They are leading in innovation	8.3	8.4	8.2	8.7	8.2	8.3	8.4	8.1	7.9	7.0	8.0	7.5	7.7	+0.2	7.6	7.9	7.3	8.4	8.3	7.6	7.7	+0.1
I trust they work with others to improve the environment	8.5	9.0	8.7	8.8	8.2	8.5	8.0	8.2	7.9	7.6	8.2	7.4	7.4	0.0	7.9	8.2	8.0	8.8	8.2	7.8	7.4	-0.4
They contribute to building a successful economy in the region	8.3	8.8	8.3	8.5	8.1	8.5	8.0	8.1	7.7	7.1	8.0	7.8	7.7	-0.1			7.8	8.5	8.2	7.6	7.7	+0.1
They are a company that you can trust	8.6	9.0	8.5	8.7	8.6	8.6	8.4	8.3	8.0	7.6	8.4	8.1	8.1	0.0	8.1	8.2	8.2	8.7	8.5	8.0	8.1	+0.1
WORKING TO IMPROVE THEIR ENVIRONMENTAL IMPACT FOR CUSTOMERS AND ITS COMMUNITIES																						
Now									7.7	7.3	7.7	7.7	7.4	-0.3						7.6	7.4	-0.2
Future generations									7.8	7.2	7.7	7.2	7.4	+0.2						7.5	7.4	-0.1
STAKEHOLDER - ESW																						
Base:	9	2	7	6	10	4	6	6	9	14	9	6	11		80	56	73	24	26	38	11	
NPS	-11.1	0.0	0.0	0.0	0.0	25.0	33.3	0.0	25.0	-23.1	0.0	-33.3	0.0	+33.3	15.3	21.3	8.5	-4.5	14.6	-6.5	0.0	+6.5
Overall satisfaction	8.1	8.0	8.5	8.5	8.1	8.3	8.7	7.3	7.9	7.8	6.8	7.5	7.5	0.0	7.9	8.4	8.3	8.3	8.1	7.5	7.5	0.0
Satisfaction with most recent contact	7.5	8.0	8.7	8.0	8.1	8.8	8.2	8.3	8.0	7.8	7.0	8.8	7.2	-1.6			8.4	8.0	8.4	7.9	7.2	-0.7
NWG has provided all information wanted	100%	0%	86%	83%	80%	75%	100%	100%	78%	57%	44%	83%	73%	-10%	78%	82%	78%	83%	89%	63%	73%	+10%
BRAND VALUES AGREEMENT:																						
They provide an unrivalled customer experience	6.4	7.0	7.5	4.7	6.5	7.0	8.4	5.5	7.3	5.7	6.0	7.0	6.4	-0.6	7.4	7.9	7.0	6.1	6.9	6.4	6.4	0.0
They provide affordable and inclusive services	6.0	8.0	7.3	7.2	7.6	7.7	8.0	5.3	7.7	6.6	6.7	7.0	7.2	+0.2			7.5	6.8	7.2	7.0	7.2	+0.2
They provide reliable and resilient services	7.3	9.0	8.5	7.8	8.3	7.7	8.5	7.4	7.8	7.6	7.1	8.2	6.6	-1.6			8.0	7.9	8.0	7.6	6.6	-1.0
They are leading in innovation	7.4	7.5	8.2	8.0	6.8	8.7	8.0	7.3	8.3	5.8	6.6	6.3	6.1	-0.2	7.2	7.7	6.7	7.8	7.7	6.7	6.1	-0.6
I trust they work with others to improve the environment	7.6	7.0	8.7	8.0	7.4	9.3	8.3	6.8	8.3	7.5	7.0	6.8	6.9	+0.1	7.6	8.0	7.8	8.0	8.0	7.5	6.9	-0.6
They contribute to building a successful economy in the region	7.0	7.0	7.6	7.5	6.4	8.0	7.0	6.4	7.1	6.6	6.6	7.0	7.4	+0.4			7.3	7.3	7.0	6.8	7.4	+0.6
They are a company that you can trust	8.0	8.5	8.8	7.7	7.9	8.3	8.3	7.4	7.9	7.7	7.2	8.0	7.5	-0.5	7.7	8.1	8.1	8.2	8.0	7.7	7.5	-0.2
WORKING TO IMPROVE THEIR ENVIRONMENTAL IMPACT FOR CUSTOMERS AND ITS COMMUNITIES																						
Now									7.9	6.9	6.6	5.8	7.1	+1.3						6.8	7.1	+0.3
Future generations									8.0	6.8	6.3	6.0	7.4	+1.4						6.8	7.4	+0.6

STAKEHOLDER TRACKING – Q1 2023

PROGRESS MONITORING – NW/NATIONAL

NWG Target 8.9

STAKEHOLDER - NW	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22	Qtr3 '22	Qtr4 '22	Qtr1 '23		2017	2018	2019	2020	2021	2022	2023 YTD	
Base:	31	36	33	36	35	39	41	35	27	34	33	36	31		120	119	125	136	150	130	31	
NPS	60.7	62.5	48.4	32.3	48.4	45.5	35.1	45.2	22.7	6.3	37.9	29.4	34.5	+5.1	39.1	32.7	31.4	50.8	43.6	23.9	34.5	+10.6
Overall satisfaction	9.1	8.8	8.4	8.4	8.6	8.4	8.7	8.3	8.2	7.9	8.4	8.3	8.4	+0.1	8.4	8.5	8.3	8.6	8.5	8.2	8.4	+0.2
Satisfaction with most recent contact	8.9	8.9	8.6	8.9	8.6	8.9	8.9	9.0	8.4	8.4	8.7	8.4	8.7	+0.3			8.5	8.8	8.9	8.5	8.7	+0.2
NWG has provided all information wanted	90%	92%	79%	72%	94%	79%	71%	77%	67%	82%	85%	81%	84%	+3%	82%	84%	82%	83%	80%	79%	84%	+5%
BRAND VALUES AGREEMENT:																						
They provide an unrivalled customer experience	8.2	8.3	7.2	7.7	8.3	6.9	7.9	7.6	7.2	6.9	7.9	6.8	7.3	+0.5	7.9	8.0	7.2	7.8	7.7	7.2	7.3	+0.1
They provide affordable and inclusive services	8.2	8.3	8.2	8.1	8.2	8.3	8.0	8.1	7.0	7.5	8.5	7.5	7.6	+0.1			7.5	8.2	8.2	7.6	7.6	0.0
They provide reliable and resilient services	8.6	8.6	8.5	8.3	8.7	8.2	8.1	8.2	7.7	7.2	8.3	8.3	8.2	-0.1			8.3	8.5	8.3	7.8	8.2	+0.4
They are leading in innovation	8.3	8.2	8.1	8.8	8.3	8.1	8.4	8.2	7.9	7.5	8.1	7.2	8.2	+1.0	7.8	8.1	7.5	8.4	8.3	7.7	8.2	+0.5
I trust they work with others to improve the environment	8.7	8.9	8.8	8.9	8.4	8.4	8.0	8.2	7.9	7.7	8.4	7.2	7.7	+0.5	8.1	8.4	8.1	8.9	8.3	7.8	7.7	-0.1
They contribute to building a successful economy in the region	8.5	8.7	8.4	8.5	8.5	8.5	8.1	8.2	7.9	7.4	8.3	7.7	8.1	+0.4			8.0	8.6	8.3	7.8	8.1	+0.3
They are a company that you can trust	8.8	9.0	8.3	8.8	8.7	8.5	8.5	8.4	8.0	7.5	8.6	7.9	8.4	+0.5	8.3	8.3	8.2	8.7	8.5	8.0	8.4	+0.4
WORKING TO IMPROVE THEIR ENVIRONMENTAL IMPACT FOR CUSTOMERS AND ITS COMMUNITIES																						
Now									7.6	7.4	7.8	7.8	7.7	-0.1						7.7	7.7	0.0
Future generations									7.8	7.5	7.8	7.2	7.6	+0.4						7.6	7.6	0.0

STAKEHOLDER - NATIONAL	Qtr1 '20	Qtr2 '20	Qtr3 '20	Qtr4 '20	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21	Qtr1 '22	Qtr2 '22	Qtr3 '22	Qtr4 '22	Qtr1 '23		2017	2018	2019	2020	2021	2022	2023 YTD	
Base:	10	12	10	9	5	7	3	9	14	2	8	8	8						41	24	32	8
NPS	11.1	63.6	62.5	75.0	75.0	85.7	0.0	37.5	0.0	-100.0	50.0	37.5	0.0	-37.5				50.0	49.6	14.8	0.0	-14.8
Overall satisfaction	8.7	9.1	9.2	8.3	8.8	9.1	8.3	7.8	8.2	6.0	8.4	8.5	7.8	-0.7				8.9	8.5	8.2	7.8	-0.4
Satisfaction with most recent contact	8.9	8.9	9.6	9.4	8.8	9.1	8.3	9.0	9.0	7.0	9.3	9.1	8.1	-1.0				9.2	8.9	9.0	8.1	-0.9
NWG has provided all information wanted	80%	58%	100%	78%	100%	86%	100%	44%	86%	50%	100%	100%	63%	-37%				78%	93%	91%	63%	-28%
BRAND VALUES AGREEMENT:																						
They provide an unrivalled customer experience	7.0	8.3	7.3	6.8	6.8	7.4	6.5	6.3	7.1	4.0	8.4	7.4	6.4	-1.0				7.5	7.0	7.4	6.4	-1.0
They provide affordable and inclusive services	8.7	9.1	8.4	8.5	8.8	8.5	8.0	8.0	7.8	5.0	8.6	8.4	6.4	-2.0				8.7	8.5	8.0	6.4	-1.6
They provide reliable and resilient services	8.5	9.3	8.8	8.0	8.2	9.0	8.3	6.8	7.8	5.0	8.8	9.0	7.4	-1.6				8.7	8.6	8.1	7.4	-0.7
They are leading in innovation	8.8	8.9	8.3	8.8	8.8	9.2	8.3	8.4	7.7	7.0	8.7	8.9	7.3	-1.6				8.7	8.9	8.2	7.3	-0.9
I trust they work with others to improve the environment	8.7	9.4	8.6	8.5	8.6	9.1	8.0	8.5	7.7	7.0	8.7	8.8	6.9	-1.9				8.8	8.7	8.2	6.9	-1.3
They contribute to building a successful economy in the region	8.5	9.0	8.2	9.0	9.0	8.7	8.3	8.7	7.7	5.0	8.5	8.5	6.7	-1.8				8.7	8.7	8.0	6.7	-1.3
They are a company that you can trust	8.5	9.0	9.1	8.9	9.0	9.1	8.3	8.4	8.1	7.0	8.8	8.9	7.5	-1.4				8.9	8.9	8.4	7.5	-0.9
WORKING TO IMPROVE THEIR ENVIRONMENTAL IMPACT FOR CUSTOMERS AND ITS COMMUNITIES																						
Now									7.6	7.0	8.3	8.7	6.9	-1.8						7.9	6.9	-1.0
Future generations									7.6	5.0	8.4	8.0	6.7	-1.3						7.3	6.7	-0.6

MOVING ANNUAL AVERAGE COMPARISONS

(MAA)

STAKEHOLDER TRACKING – Q1 2023

MAA

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 Moving Annual Average (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 quarter to quarter.

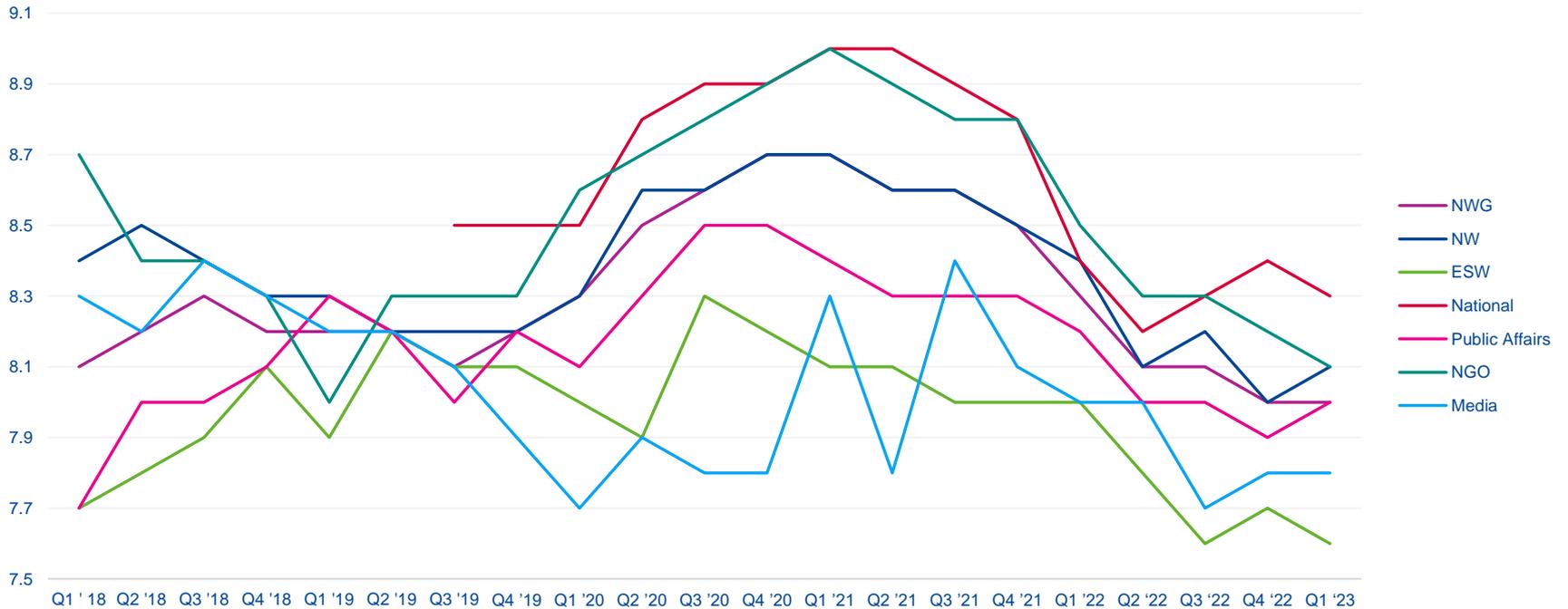
Each MAA data point is a total of the interviews completed in the four quarters up to and including that wave. This gives a total base averaging around 120 for NW and 60-80 for ESW, along with 90 for Public Affairs, 65 for NGOs and 40 for Media; it is then possible also to significance test the MAA data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

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MAA - TRUST

Trust MAA remains fairly consistent, with the overall trust score remaining the same as Q4 2022 (8.0), an increase for NW contacts of 0.1 to 8.1 and a slight decline for ESW and national contacts of 0.1 to 7.6 and 8.3 respectively.

There's a similar picture with the stakeholder groups with the media contact scores remaining the same over the last two quarters (7.8), an increase in public affairs contact scores by 0.1 to 8.0, and a slight decline of 0.1 to 8.1 for NGO contacts.

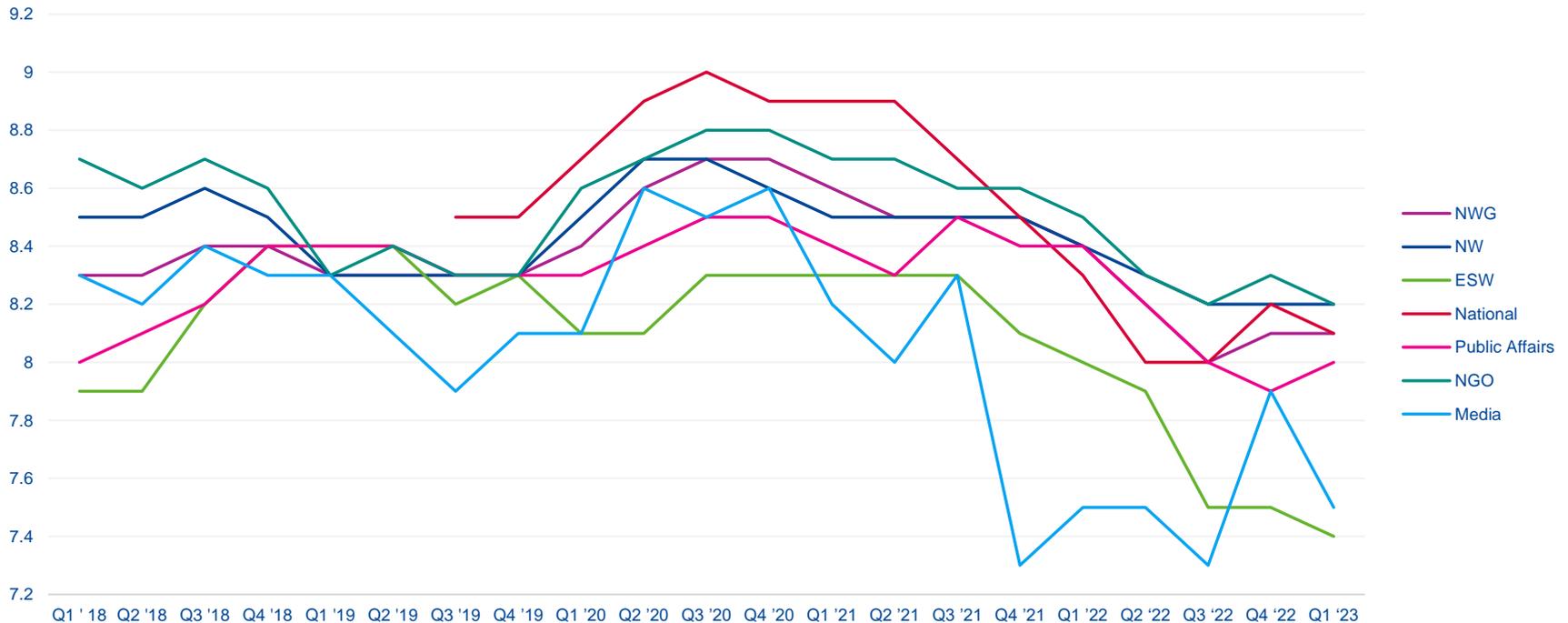


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MAA - OVERALL SATISFACTION

Overall satisfaction has remained consistent overall at 8.1 for the two recent quarters. Trust for NW contacts has remained the same as Q4 2022 at 8.2, and there's a slight decline in ESW and national contacts of 0.1 to 7.4 and 8.1 respectively.

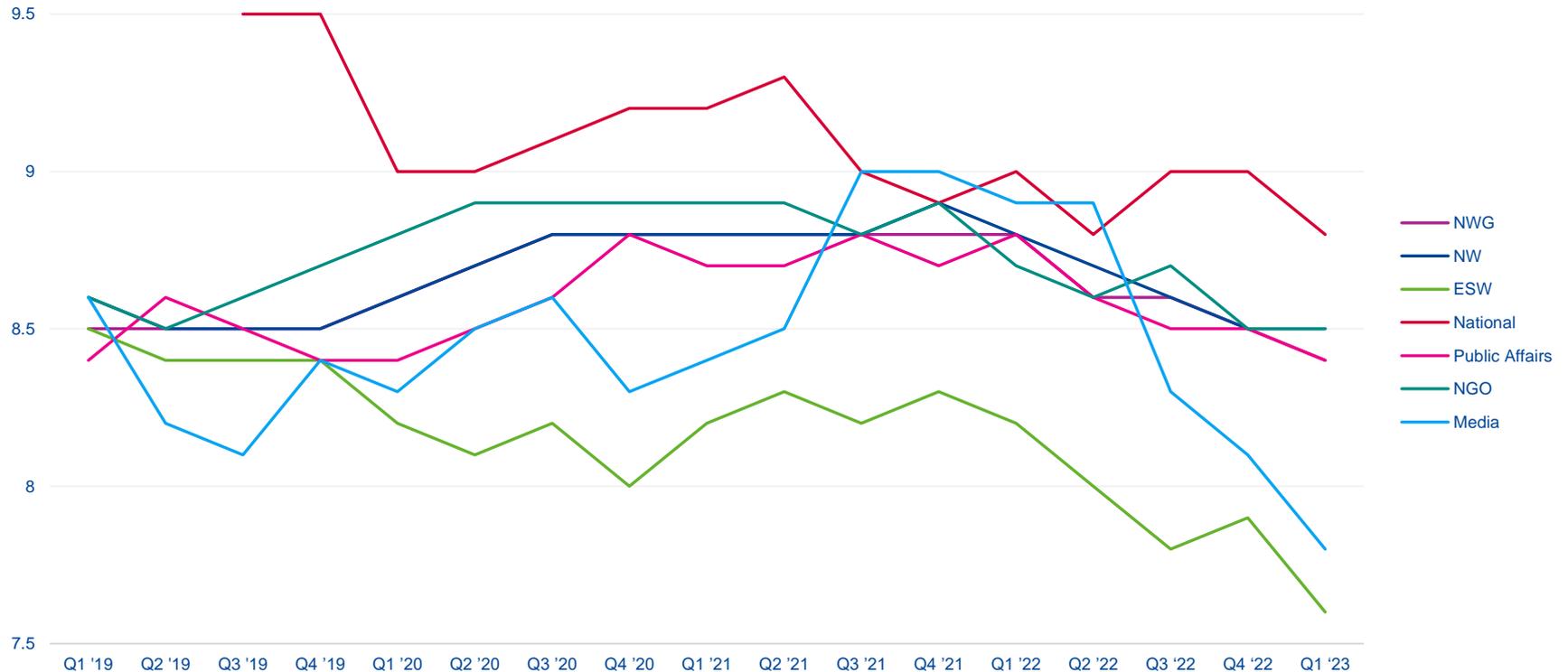
Public affairs contacts scored 0.1 higher than Q4 2022 (8.0) and we see a decline for both NGO and media contacts of 0.1 (8.2) and 0.4 (7.5) respectively.



STAKEHOLDER TRACKING – Q1 2023

MAA - SATISFACTION WITH MOST RECENT CONTACT

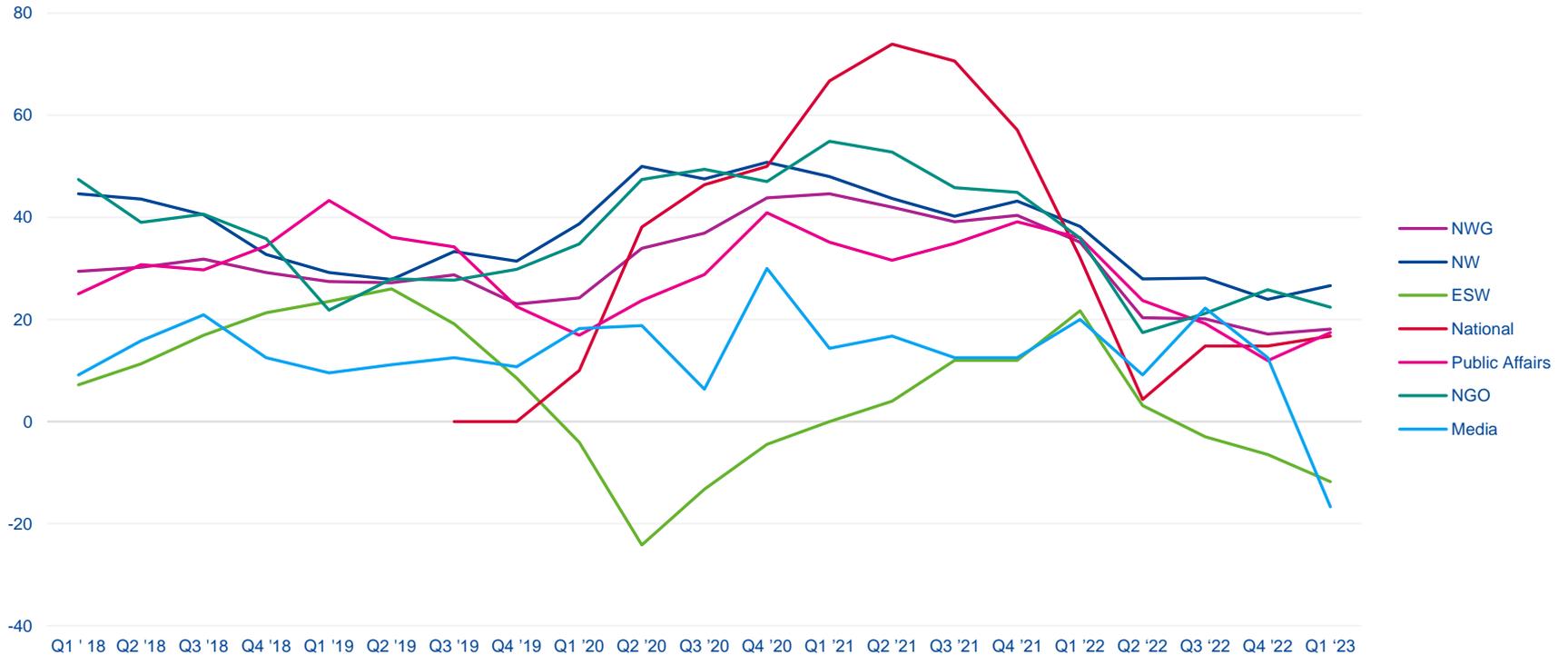
With the exception of NW and NGO contacts, where scores remained the same as they were for Q4 2022, all others have declined in Q1, with the biggest decline of 0.3 from both ESW and media contacts.



STAKEHOLDER TRACKING – Q1 2023

MAA - NPS

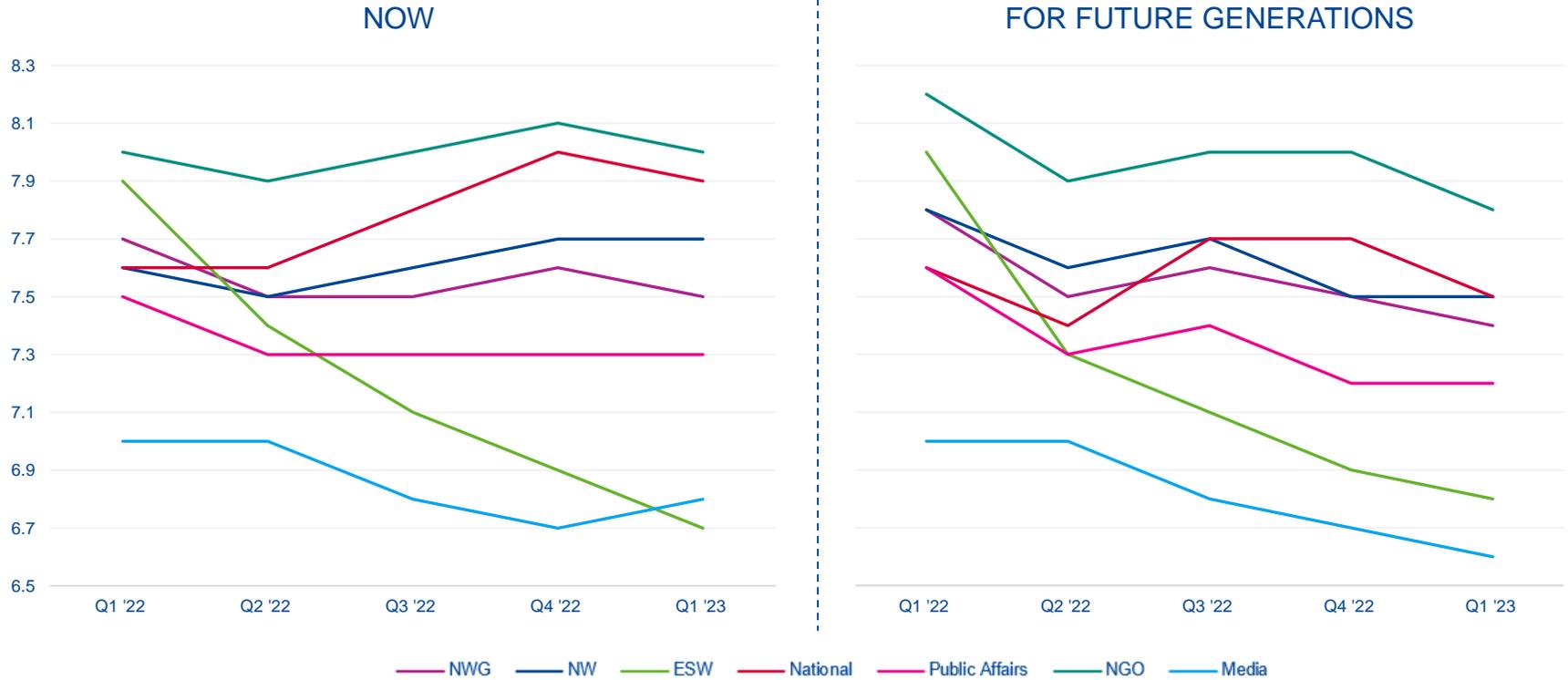
Overall NPS is +18.1 in Q1 2023 an increase of 1.0 compared to Q4 2022. The highest MAA result being received from NW contacts (+26.6) and the lowest for media contacts (-16.7).



STAKEHOLDER TRACKING – Q1 2023

MAA WORKING TO IMPROVE THE ENVIRONMENT

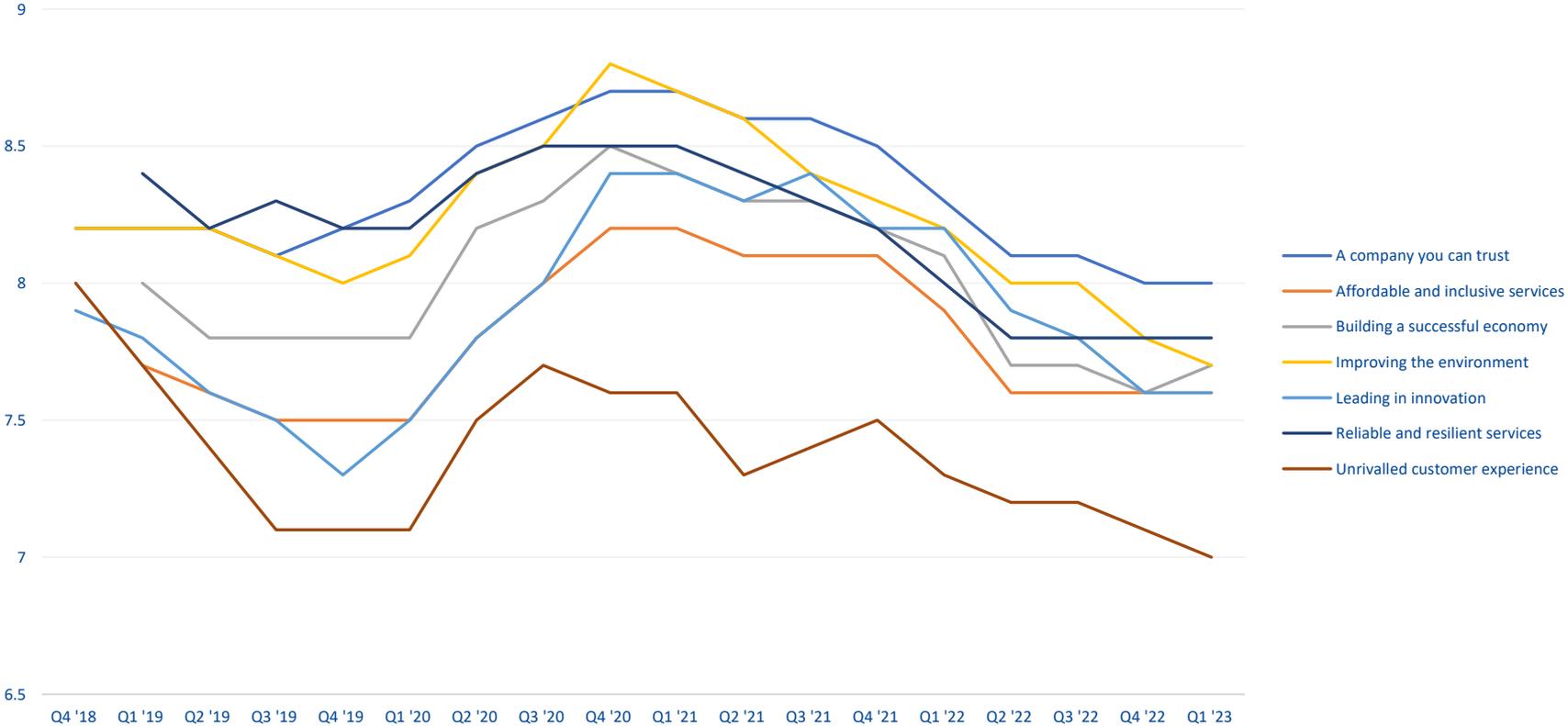
This question was new at the start of 2022, and can be shown as a MAA now that a year's worth of data has been collected. The data shows that ESW and media contacts are less likely to agree that NWG is working to improve the environment now and for future generations, with NGOs more likely to agree with this.



STAKEHOLDER TRACKING – Q1 2023

MAA BRAND VALUES

Very little change in the MAA for brand related questions, with most staying the same as Q4 2022 and a few declining by 0.1 in Q1 2023.

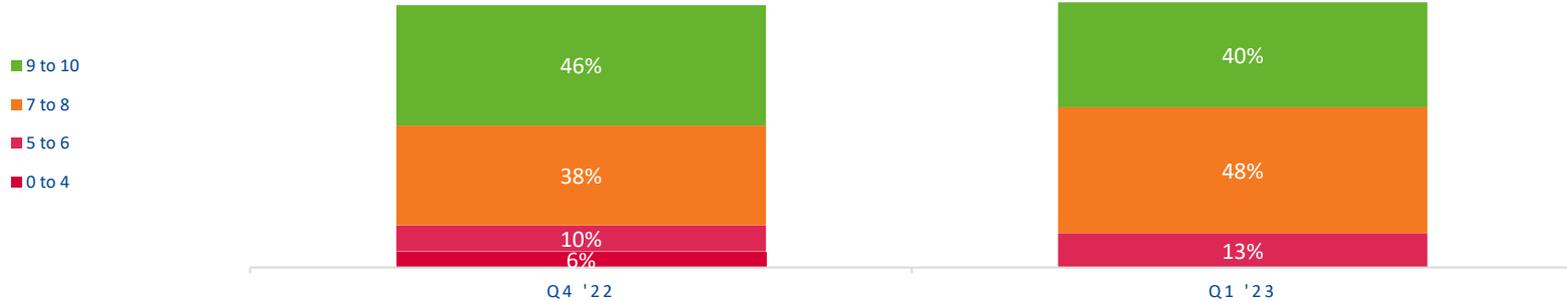


Q1 2023 RESULTS

STAKEHOLDER TRACKING – Q1 2023

TRUST

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



Overall mean score: 8.1

Region	NW (31)	8.4
	ESW (11)	7.5
	National (8)	7.5
Type	Public affairs (30)	8.2
	NGO (18)	7.8
	Media (2)	8.5

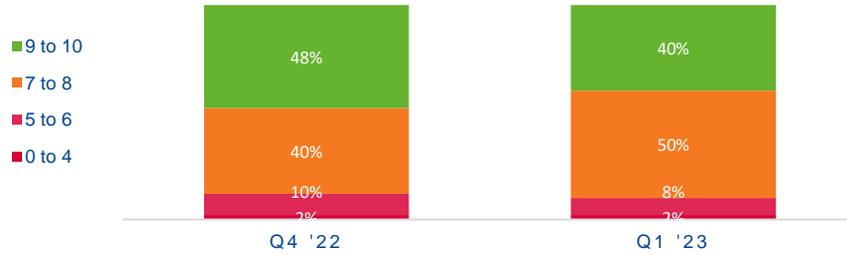
Comment themes for reasons for trust score



STAKEHOLDER TRACKING – Q1 2023

OVERALL SATISFACTION

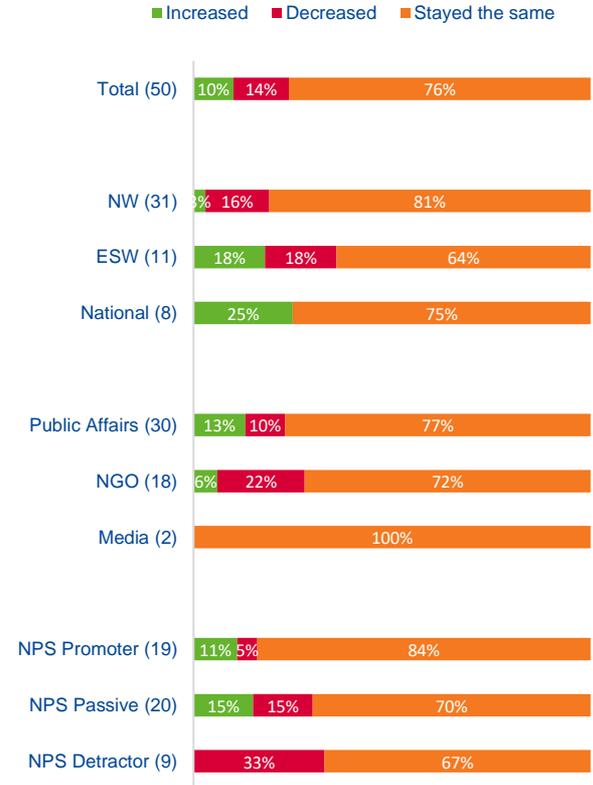
How satisfied are you overall with NWG
(10 = very satisfied, 0 = very dissatisfied)



Overall mean score: 8.1

Region	NW (31)	8.4
	ESW (11)	7.5
	National (8)	7.8
Type	Public affairs (30)	8.2
	NGO (18)	7.9
	Media (2)	7.5

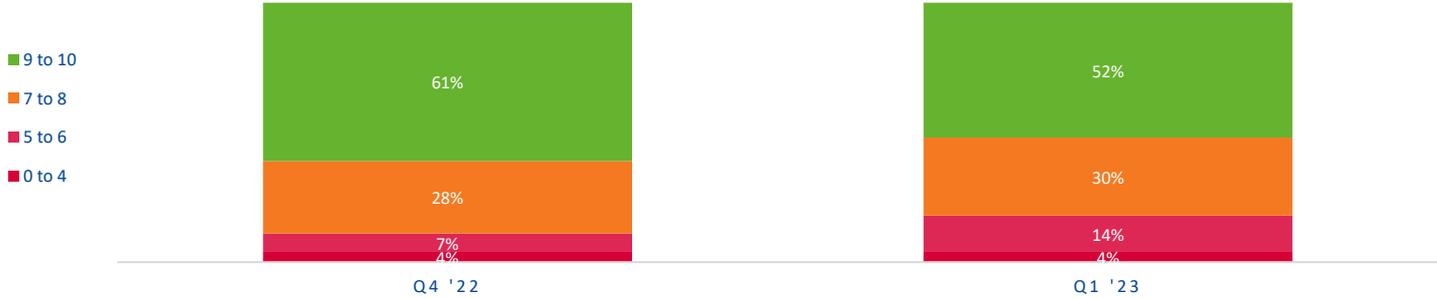
Overall satisfaction change over the last year



STAKEHOLDER TRACKING – Q1 2023

SATISFACTION WITH MOST RECENT CONTACT

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



Overall mean score: 8.3

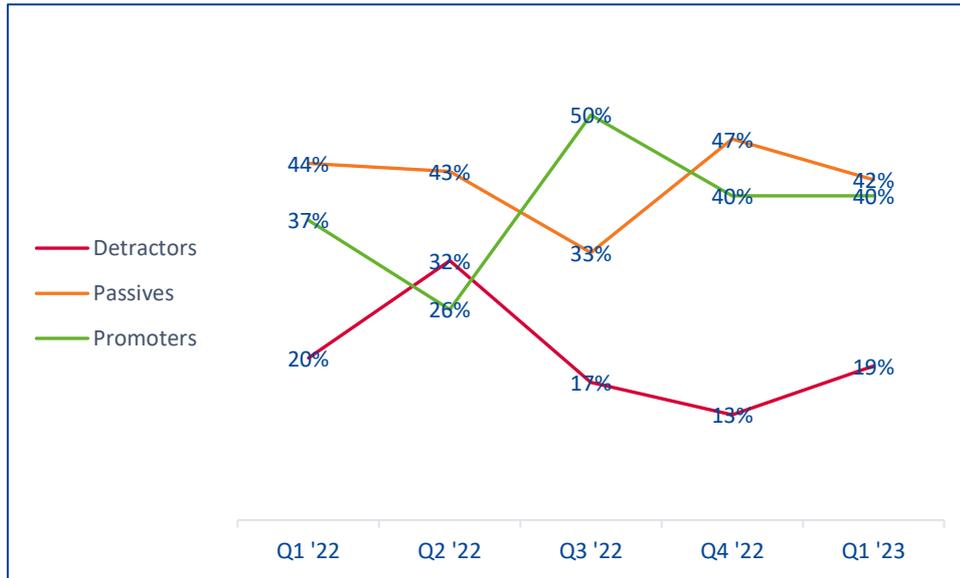
Region	NW (31)	8.7
	ESW (11)	7.2
	National (8)	8.1
Type	Public affairs (30)	8.3
	NGO (18)	8.2
	Media (2)	8.0

STAKEHOLDER TRACKING – Q1 2023

NPS

Likelihood to recommend NWG

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



Overall NPS: 20.8

Region	NW (31)	34.5
	ESW (11)	0.0
	National (8)	0.0
Type	Public affairs (30)	25.0
	NGO (18)	16.7
	Media (2)	0.0

The percentage of Promoters has remained consistent at 40%, and we see a drop in Passives which means that the percentage of Detractors has increased in Q1.

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NPS – COMMENT THEMES (MORE THAN ONE COMMENT MADE)

PROMOTERS

- No problems – happy with the service (9)
- It's a monopoly (3)
- Been a customer for many years/a long time (3)
- Good communication (2)
- Regional presence/engagement – supporting communities (2)

PASSIVES

- No problems, happy with the service (5)
- Good company (4)
- Need to improve their environmental work (3)
- Professional, efficient etc (2)
- Service is responsive – quick to resolve issues (2)
- Environment work eg rainwater harvesting (2)

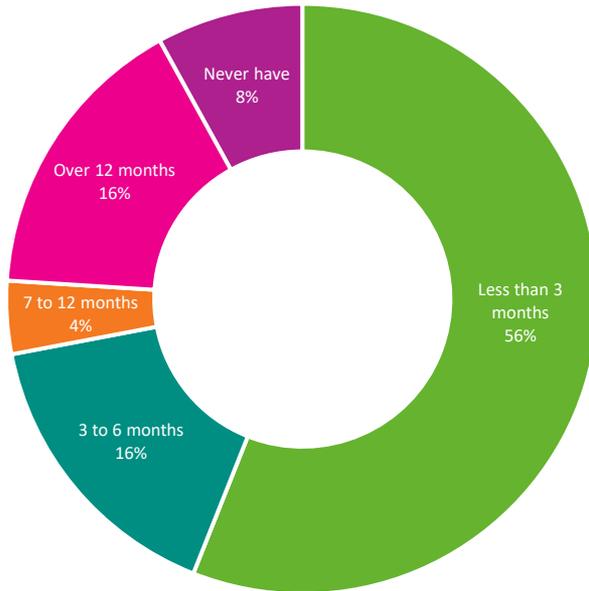
DETRACTORS

- Would not/no need to recommend – up to individual (2)
- They're neither good nor bad (2)

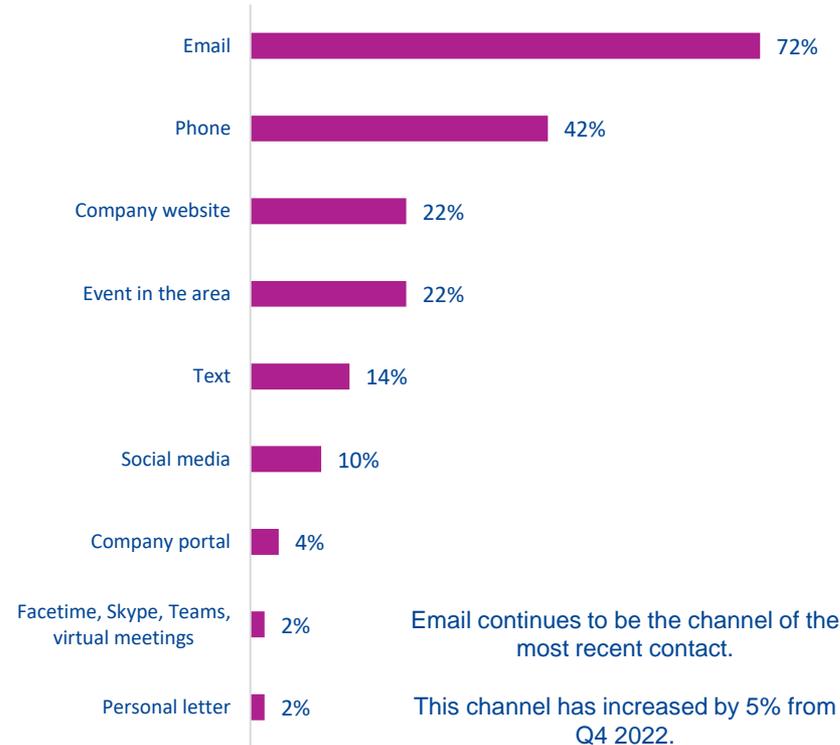
STAKEHOLDER TRACKING – Q1 2023

CONTACT

Most recent contact with NWG

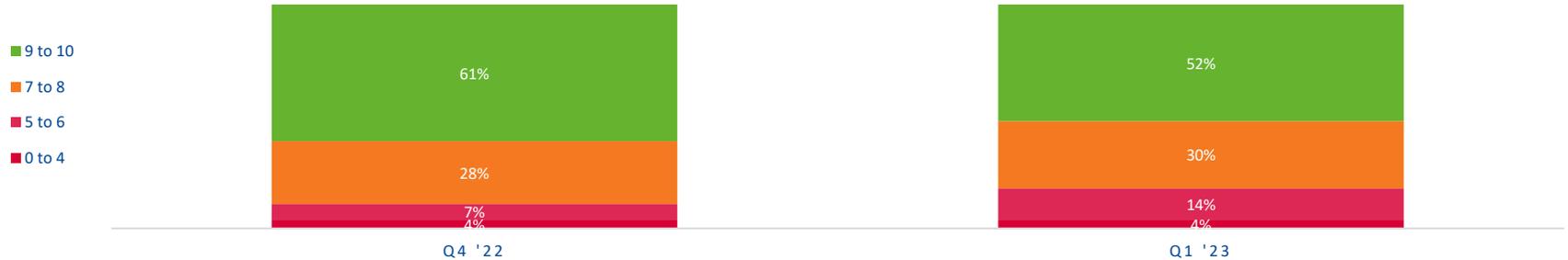


Channel of most recent contact



STAKEHOLDER TRACKING – Q1 2023

SATISFACTION WITH MOST RECENT CONTACT



Mean score: 8.3

Region	NW (31)	8.7
	ESW (11)	7.2
	National (8)	8.1
Type	Public affairs (30)	8.3
	NGO (18)	8.2
	Media (2)	8.0

Additional comments

“Had some issues on a site and the pre-application requirement and the response wasn’t corresponding from NW with the discussions that had been previously on site and feel like there is some miscommunication through the departments but now it is resolved.”

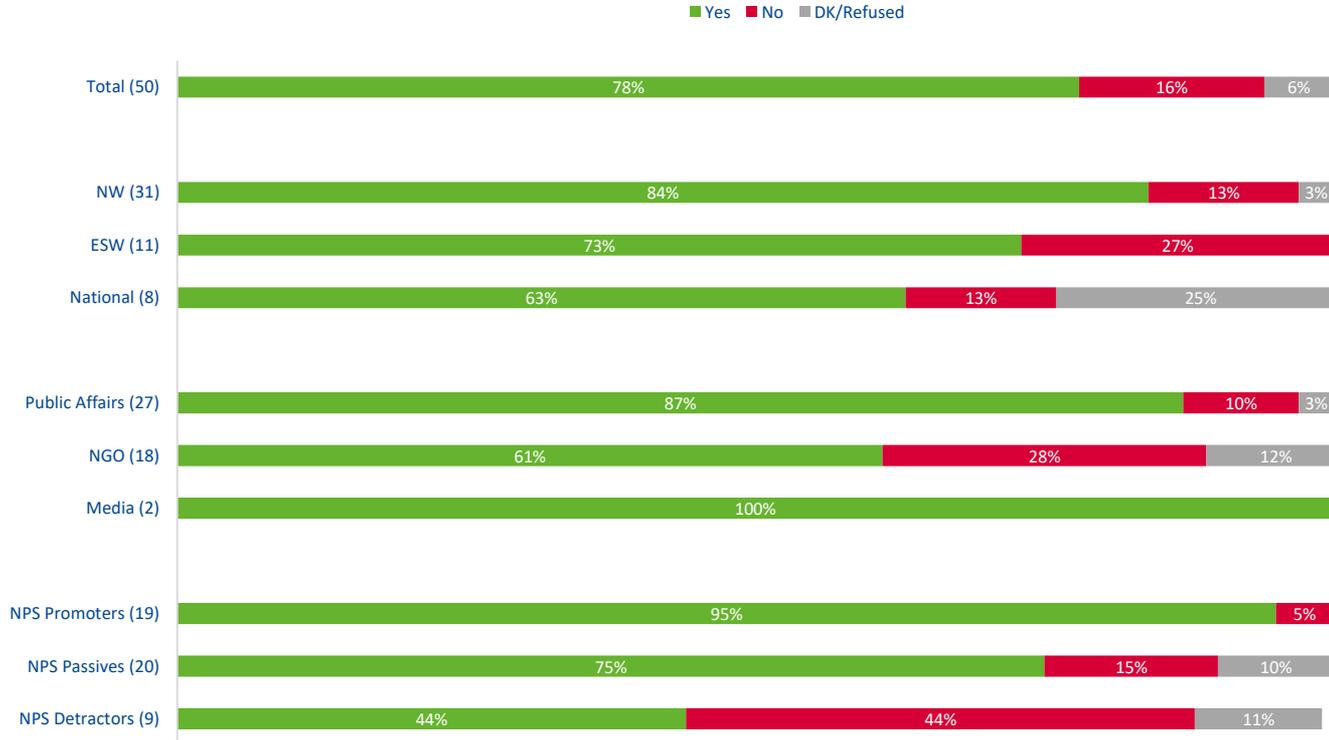
National, NGO

“Couple of issues going on with potholes and it takes a long time to make the road perfect.”

ESW, Public affairs

STAKEHOLDER TRACKING – Q1 2023

SUPPLIED WITH ALL THE INFORMATION WANTED



STAKEHOLDER TRACKING – Q1 2023

PREFERRED CHANNELS FOR REGULAR INFORMATION



Email continues to be the preferred channel for receiving regular information.

There were mentions of subject specific/interactive workshops, and using third parties this quarter, that have not been previously mentioned.

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DOMESTIC WATER PROVIDER



APRIL 2023

The background features a gradient from dark blue at the top to light green at the bottom. A large, dark blue, wavy shape flows from the left side towards the center. In the lower right, there are several overlapping, semi-transparent green shapes, including a large oval and a series of parallel, slightly curved lines that create a sense of motion or depth.