

STAKEHOLDER TRACKING

Q2 2022

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STAKEHOLDER TRACKING – Q2 2022

INTRODUCTION

This is an ongoing research programme with NWG's 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: 16 to 27 May
- Average interview length: 13.5 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

Location	Number of interviews
NWG	50
NW	34
ESW	14
National	2

Type of business	Number of interviews
Public	33
NGO	16
Media	1

STAKEHOLDER TRACKING – Q2 2022

SUMMARY

Due to the low quarterly number of interviews we continue to see lower scores, which should average out as the data becomes more representative over the remaining two phases for 2022.

In summary, compared to Q1 we see a drop in all measures, except those where stakeholders are domestic customers of NWG when we see an increase in the scores for supplying clean and clear drinking water and tap water being preferred to bottled.

From the service related questions, leading in innovation shows the biggest change, where we see a 0.9 drop to 7.0, which is mainly contributed by the 2.5 drop in ESW, scoring 5.8 in Q2.

A couple of the NW area brand value measures have increased from Q1 2022, these being:

- Supplying clean and clear drinking water (9.4), an increase of 0.1
- Supplying drinking water that tastes and smells good (9.2), an increase of 0.2

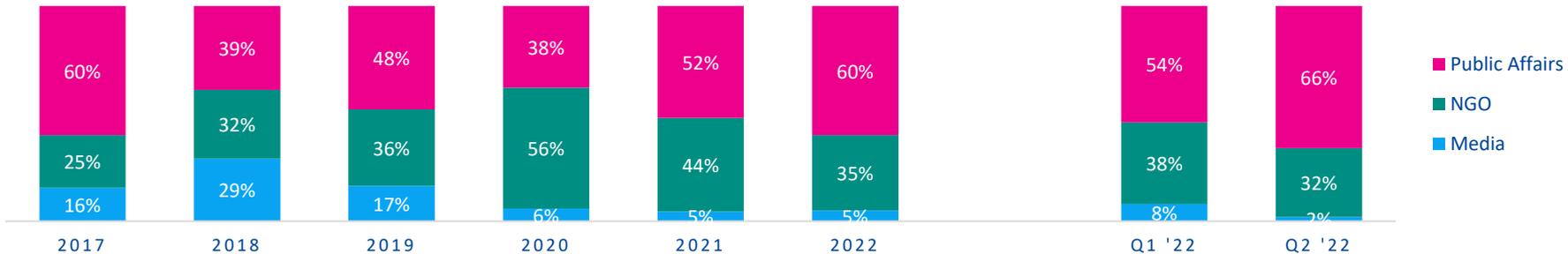
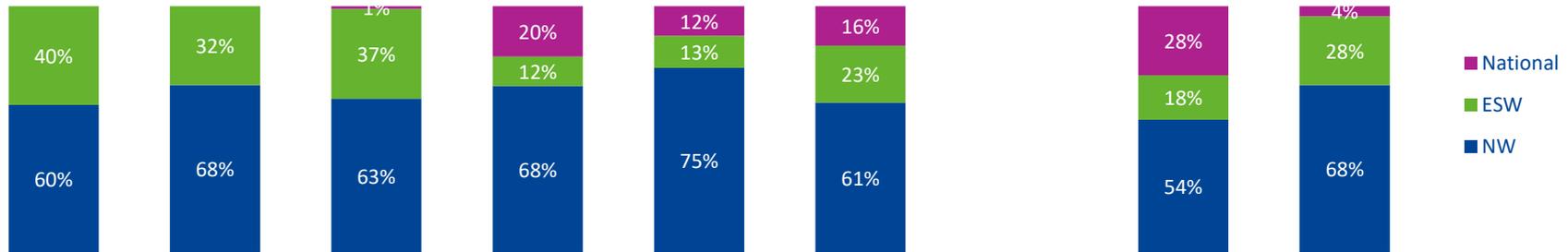
I am currently trialling a comparative text analytics piece of software, licenced to us by Relative Insight, which uses qualitative data to help analyse open ended questions to help further understand audiences while also comparing different databases, timescales, customer types and so much more. I took the opportunity to use the software and compare the Q2 results to Q1 to see if any particular differences could be identified. One topic that was not mentioned in Q1 but was this phase, was pollution, with reference being made to lack of action being taken, river pollution, one reference to the Darlington incident, and another that made reference to a pollution incident from a couple of years ago.

SAMPLE PROFILE

STAKEHOLDER TRACKING – Q2 2022

SAMPLE PROFILE

Variation in profile from year to year



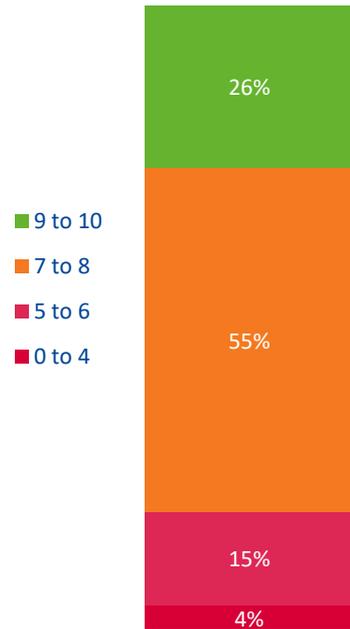
SATISFACTION

WITH TRUST, OVERALL SATISFACTION AND BRAND VALUES

STAKEHOLDER TRACKING – Q2 2022

TRUST

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



Mean score: 7.6

Region	NW (33)	7.5
	ESW (13)	7.7
	National (1)	7.0
Type	Public Affairs (32)	7.5
	NGO (15)	7.8
	Media (0)	0.0

Comment themes for reasons for trust score

No reason not to trust them/they are trustworthy (11)

Honest, open, transparent (10)

Professional, efficient, reliable (7)

Service is responsive/quick to resolve issues (7)

Good experience with them (7)

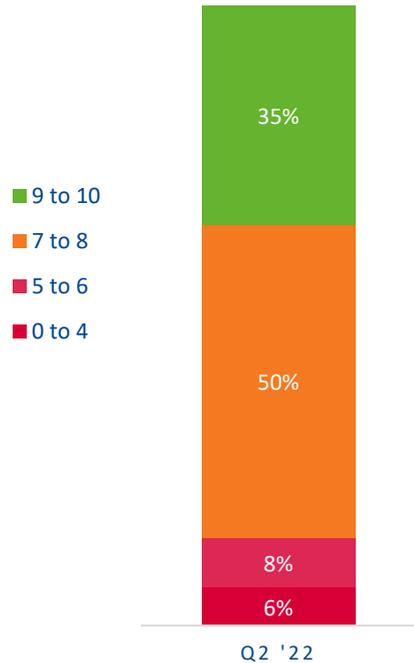
They do what they say they're going to do/keep promises (6)

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

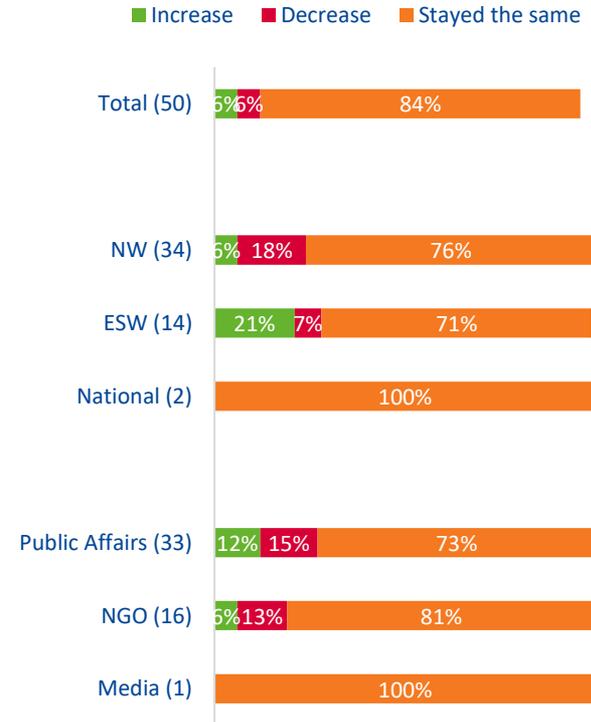
How satisfied are you overall with NWG
(10 = very satisfied, 0 = very dissatisfied)



Mean score: 7.9

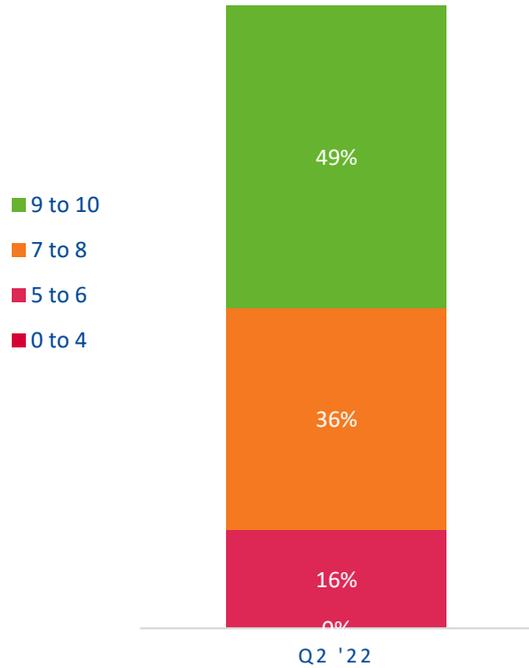
Region	NW (34)	7.9
	ESW (13)	7.8
	National (1)	6.0
Type	Public Affairs (33)	7.8
	NGO (15)	8.1
	Media (0)	0.0

Overall satisfaction change over the last year



STAKEHOLDER TRACKING – Q2 2022

SATISFACTION WITH MOST RECENT CONTACT



Mean score: 8.2

Region	NW (32)	8.4
	ESW (12)	7.8
	National (1)	7.0
Type	Public Affairs (29)	8.0
	NGO (16)	8.5
	Media (0)	0.0

No comments made on the satisfaction with the most recent contact

STAKEHOLDER TRACKING – Q2 2022

BRAND VALUES – PROGRESS MONITORING

Brand values	2017	2018	2019	2020	2021	2022 YTD	Q1 '22	Q2 '22	
Provide an unrivalled customer experience	7.8	8.0	7.1	7.6	7.5	7.2	7.2	6.5	
Provide affordable and inclusive services			7.5	8.2	8.1	7.4	7.4	7.2	Lowest scoring ESW 6.6
Provide reliable and resilient services			8.2	8.5	8.2	7.7	7.7	7.2	Highest scoring ESW at 7.6
Leading in innovation	7.6	7.9	7.3	8.4	8.2	7.9	7.9	7.0	Lowest scoring ESW at 5.8
Trusted to work with others to improve the environment	7.9	8.2	8.0	8.8	8.3	7.9	7.9	7.6	Highest scoring NGO at 8.4
Contribute to building a successful economy in the region			7.8	8.5	8.2	7.7	7.7	7.1	
Company you can trust	8.1	8.2	8.2	8.7	8.5	8.0	8.0	7.6	
Leading company in tackling leakage			7.6	7.8	7.5	6.9	6.9	6.6	
Working to improve environmental impact for customers/communities – now						7.7	7.7	7.3	Highest scoring NGO at 7.8
Working to improve environmental impact for customers/communities – for future generations						7.8	7.8	7.2	

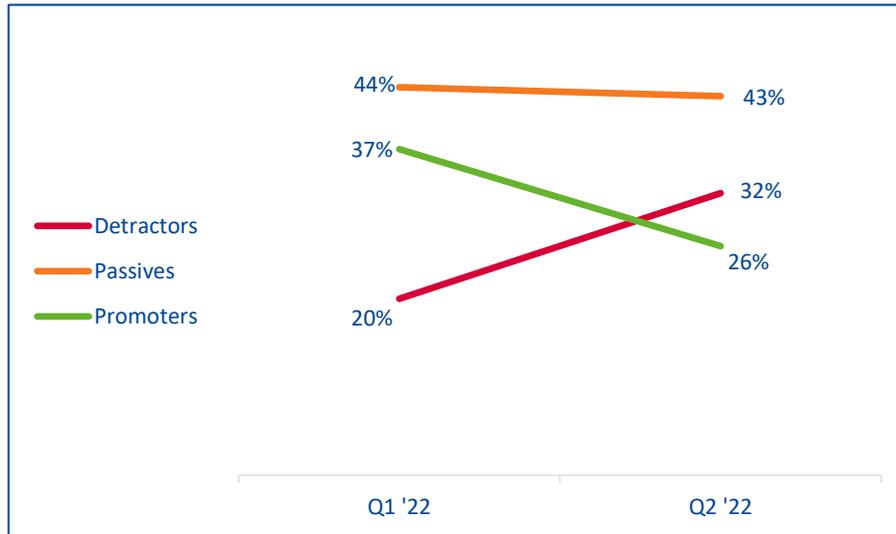
NPS

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NPS

Likelihood to recommend NWG

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



Overall NPS: -6.4

Region	NW (32)	6.3
	ESW (13)	-23.1
	National (2)	-100.0
Type	Public Affairs (31)	-3.2
	NGO (15)	-6.7
	Media (1)	-100.0

STAKEHOLDER TRACKING – Q2 2022

NPS – COMMENT THEMES

PROMOTERS

- Good service (3)
- No problems – happy with the service (2)
- Good communication (2)
- Professional/efficient (2)
- Service is responsive/quick to resolve issues (2)
- Customer focussed (2)
- Do a good job/they are good/good in general (2)

PASSIVES

- No problems – happy with the service (4)
- Supply is reliable/constant (4)
- Good experience with them (3)
- Water quality is good (2)
- Service is responsive/quick to resolve issues (2)
- Can't make comparison/no real choice of supplier (2)
- Little/no contact or don't know enough about them (2)
- Do a good job/they are good/good in general (2)

DETRACTORS

- Cant make a comparison/no real choice of supplier (2)
- Little/no contact or don't know enough about them (2)
- Need to improve their environmental work (2)

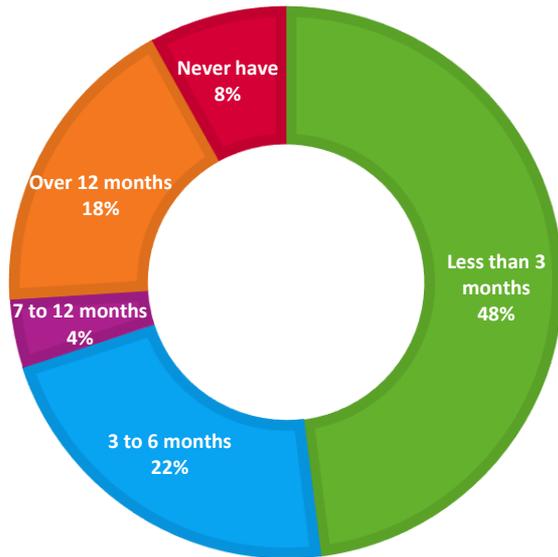
CONTACT

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

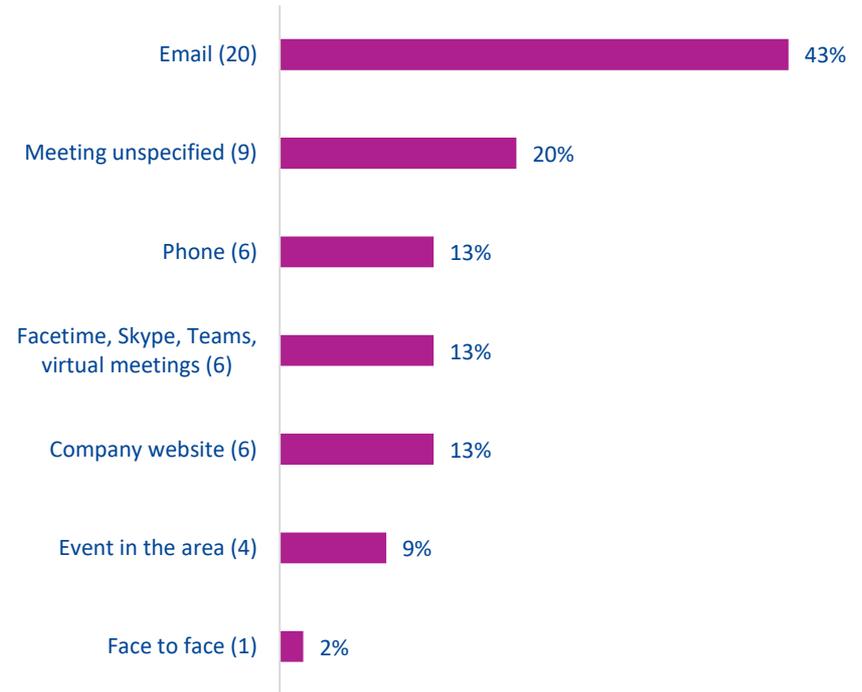
STAKEHOLDER TRACKING – Q2 2022

CONTACT

Most recent contact with NWG



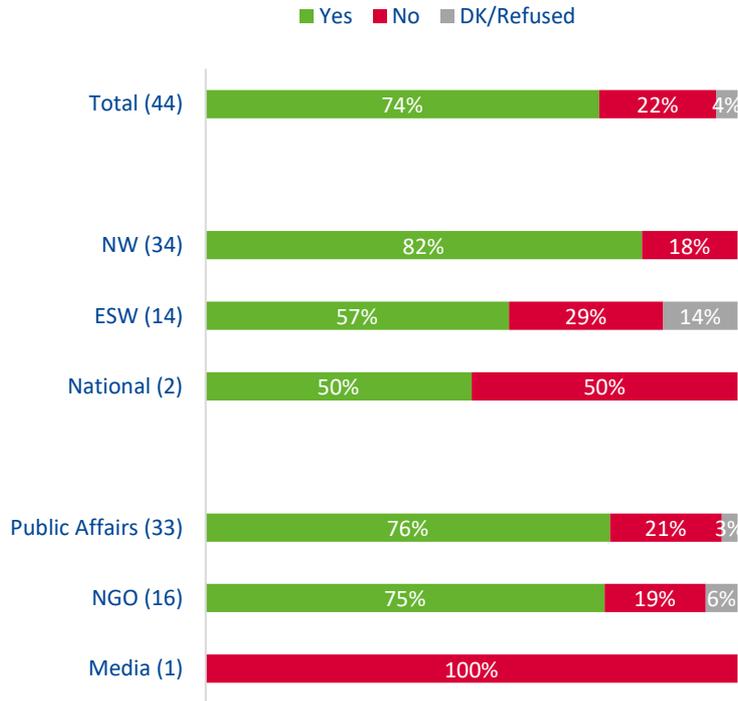
Channel of most recent contact



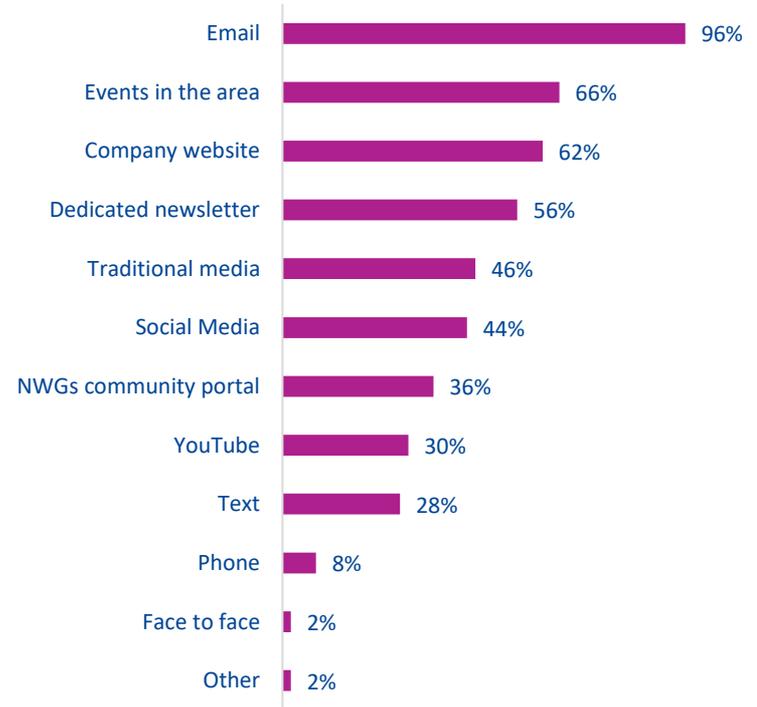
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INFORMATION

Supplied with all the information wanted to feel informed



Preferred channel(s) for regular information (prompted)



MOVING ANNUAL AVERAGES COMPARISON

(MAA)

STAKEHOLDER TRACKING – Q2 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 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 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 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.

STAKEHOLDER TRACKING – Q2 2022

TRUST

MAA 12 months to:		Q2 '19	Q3 '19	Q4 '19	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Q2 '22
Region	Total	8.2	8.1	8.2	8.3	8.5	8.6	8.7	8.7	8.6	8.6	8.5	8.3	8.1
	NW	8.2	8.2	8.2	8.3	8.6	8.6	8.7	8.7	8.6	8.6	8.5	8.4	8.1
	ESW	8.2	8.1	8.1	8.0	7.9	8.3	8.2	8.1	8.1	8.0	8.0	8.0	7.8
Type	Public	8.2	8.0	8.2	8.1	8.3	8.5	8.5	8.4	8.3	8.3	8.3	8.2	8.0
	NGO	8.3	8.3	8.3	8.6	8.7	8.8	8.9	9.0	8.9	8.8	8.8	8.5	8.3
	Media	8.2	8.1	7.9	7.7	7.9	7.8	7.8	8.3	7.8	8.4	8.1	8.0	8.0

STAKEHOLDER TRACKING – Q2 2022

OVERALL SATISFACTION

MAA 12 months to:		Q2 '19	Q3 '19	Q4 '19	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Q2 '22
Region	Total	8.3	8.3	8.3	8.4	8.6	8.7	8.7	8.6	8.5	8.5	8.5	8.4	8.2
	NW	8.3	8.3	8.3	8.5	8.7	8.7	8.6	8.5	8.5	8.5	8.5	8.4	8.3
	ESW	8.4	8.2	8.3	8.1	8.1	8.3	8.3	8.3	8.3	8.3	8.1	8.0	7.9
Type	Public	8.4	8.3	8.3	8.3	8.4	8.5	8.5	8.4	8.3	8.5	8.4	8.4	8.2
	NGO	8.4	8.3	8.3	8.6	8.7	8.8	8.8	8.7	8.7	8.6	8.6	8.5	8.3
	Media	8.1	7.9	8.1	8.1	8.6	8.5	8.6	8.2	8.0	8.3	7.3	7.5	7.5

STAKEHOLDER TRACKING – Q2 2022

NPS

MAA 12 months to:		Q2 '19	Q3 '19	Q4 '19	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Q2 '22
Region	Total	27.2	28.7	23.0	24.2	33.9	36.9	43.8	44.6	42.0	39.1	40.4	35.1	20.3
	NW	27.8	33.3	31.4	38.7	50.0	47.5	50.8	48.0	43.7	40.2	43.2	38.2	27.9
	ESW	26.0	19.1	8.5	-4.1	-24.2	-13.3	-4.5	0.0	4.0	12.0	12.0	21.7	3.1
Type	Public	36.1	34.2	22.5	16.9	23.7	28.8	40.9	35.1	31.6	34.9	39.1	36.0	23.7
	NGO	27.9	27.7	29.8	34.8	47.4	49.4	47.0	54.9	52.8	45.8	44.9	35.9	17.4
	Media	11.1	12.5	10.7	18.2	18.8	6.3	30.0	14.3	16.7	12.5	12.5	20.0	9.1

STAKEHOLDER TRACKING – Q2 2022

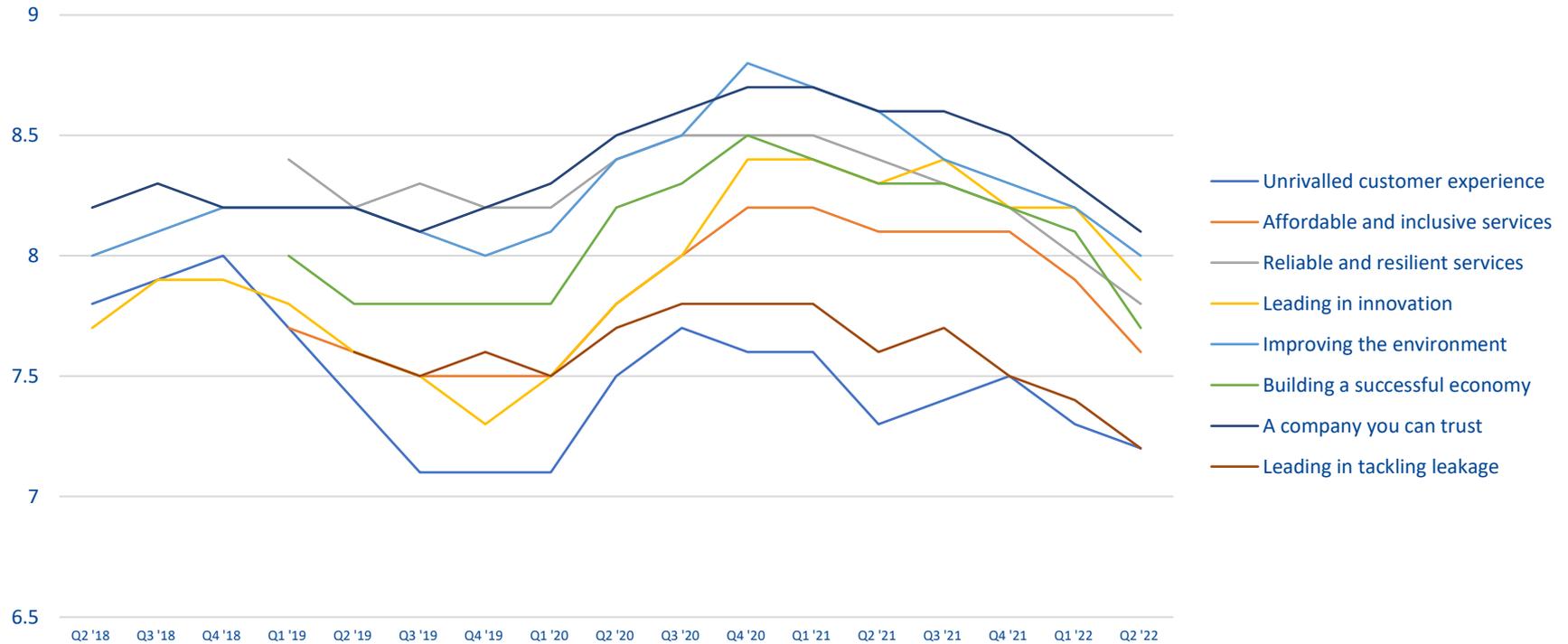
SATISFACTION WITH MOST RECENT CONTACT

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

STAKEHOLDER TRACKING – Q2 2022

BRAND VALUES

All brand measures show a downward trend in Q2 2022



TAP OR BOTTLED WATER PREFERENCE

STAKEHOLDERS WHO ARE ALSO DOMESTIC CUSTOMERS

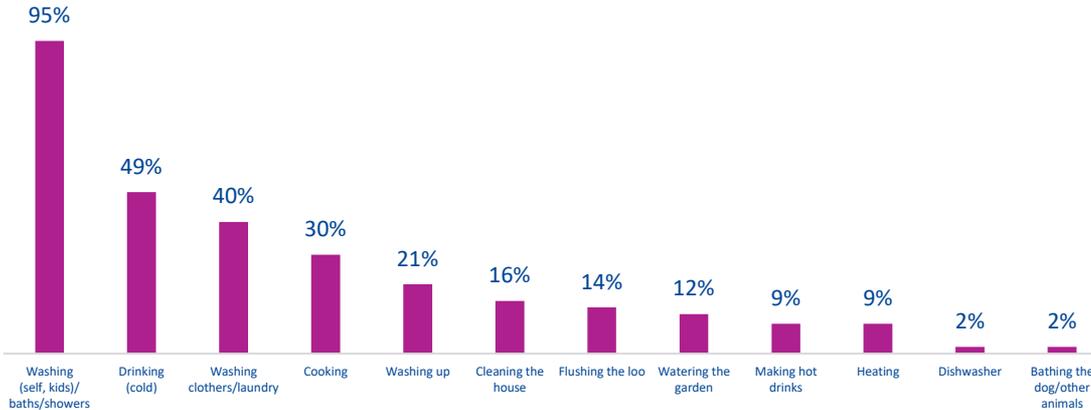
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TAP OR BOTTLED WATER PREFERENCE

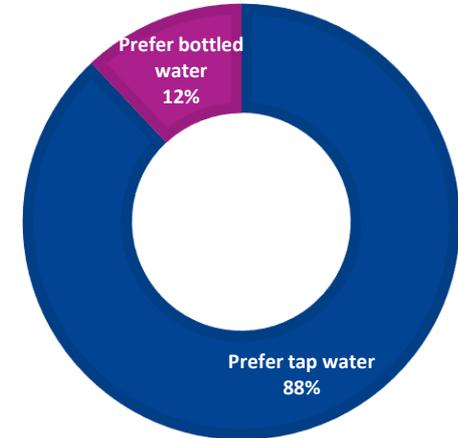
70% of stakeholders are supplied by NW or ESW at home

Satisfaction with domestic supply	2021	2022 YTD	Q1 '22	Q2 '22
Supply clean and clear drinking water	9.2	9.3	9.2	9.3
Supply drinking water that tastes and smells good	8.9	9.0	9.0	8.9
Provide a reliable supply of water	9.4	9.4	9.5	9.2
Provide sufficient pressure	9.0	8.9	9.2	8.6

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 (32)	97%
	ESW (11)	64%
	National (0)	0%
Type	Public Affairs (31)	84%
	NGO (12)	100%
	Media (0)	0%

APRIL 2022

The background features a gradient from dark blue at the top to light green at the bottom. A prominent dark blue diagonal band runs from the top-left towards the bottom-right. Overlaid on this are several wavy, parallel lines in shades of teal and light green, creating a sense of movement and depth.