



15 / 09 / 21

# Stakeholder Tracker Results: Quarter 3 2021

Our ref. J8158.2



DEFINING THE **CLEAREST** DIRECTION

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# Stakeholder Tracker

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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

Qtr3 2021

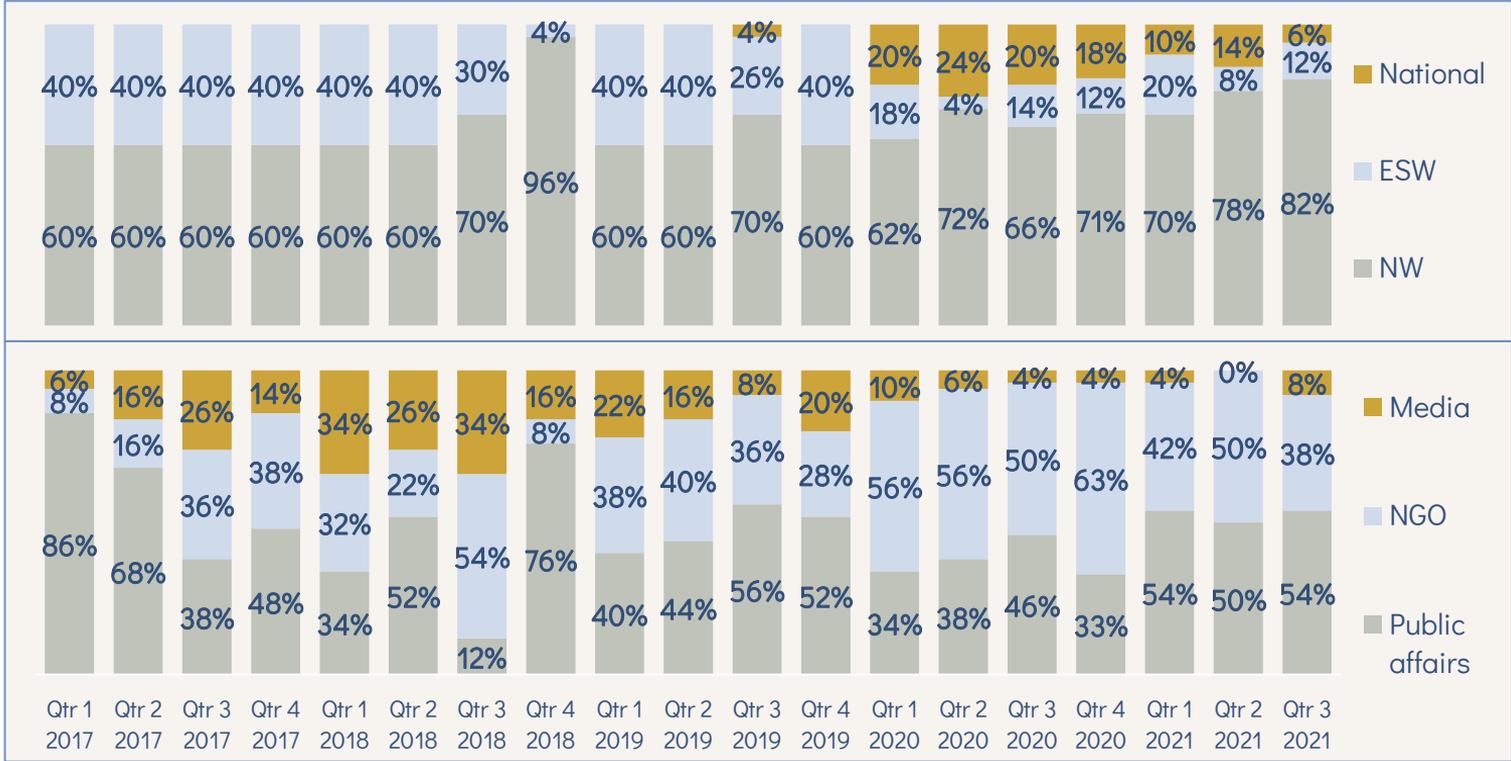
Fieldwork carried out:

24 Aug – 10 Sept 2021

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

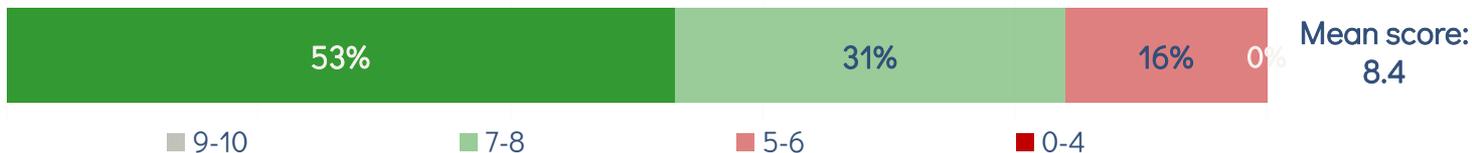


(Qtr4 '18 - 25 interviews)



# Trust

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



Base: all respondents, where answer given (49)

Region	NW (40)	8.5
	ESW (6)	8.3
	National (3)	8.3
Type	Public affairs (26)	8.4
	NGO (19)	8.5
	Media (4)	8.5

Because of the type of organisation - I wouldn't expect them not to be trustworthy, a major provider would be true and accurate

In my experience over 30 years everything they've said they will do, they have done. I have a very positive relationship with the organisation

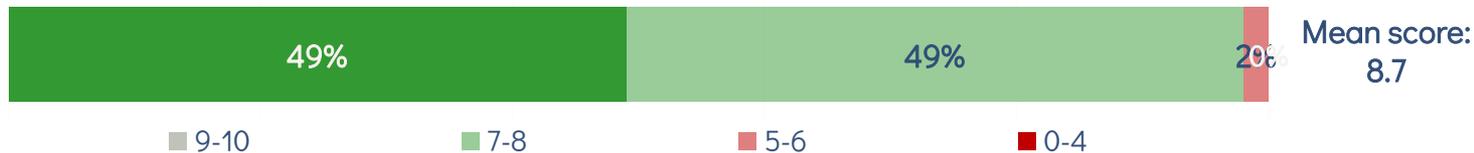
They seem always to be open and responsive and they don't seem to engender bad publicity in the way some other companies do

I'm always a bit sceptical of private organisations that have profit at their heart



# Overall satisfaction

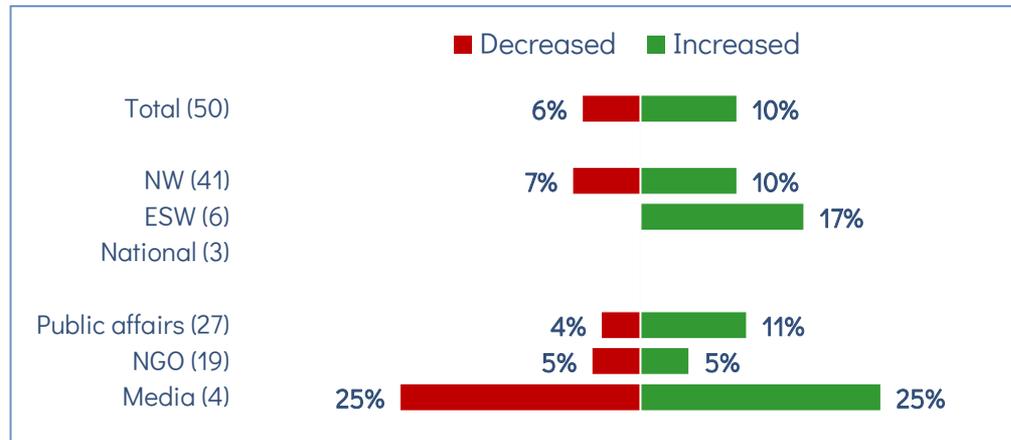
How satisfied are you overall with NWG (10 = very satisfied, 0 = very dissatisfied)



Base: all respondents, where answer given (49)

Region	NW (40)	8.7
	ESW (6)	8.7
	National (3)	8.3
Type	Public affairs (26)	8.9
	NGO (19)	8.6
	Media (4)	7.8

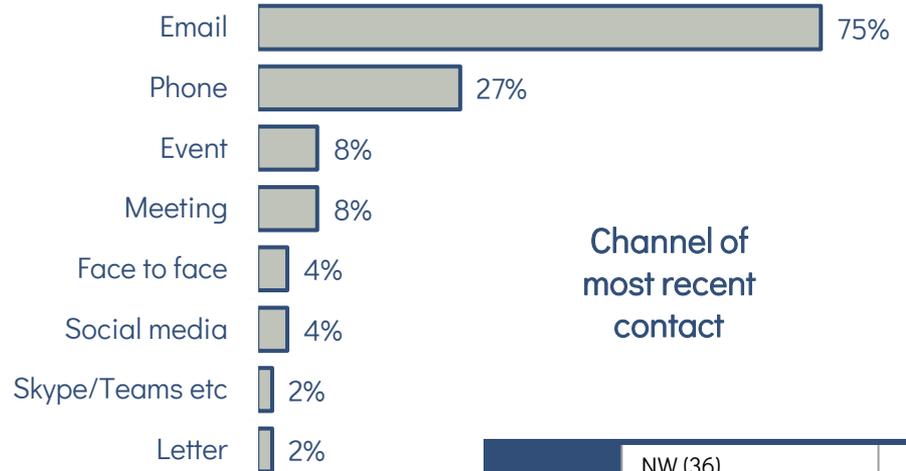
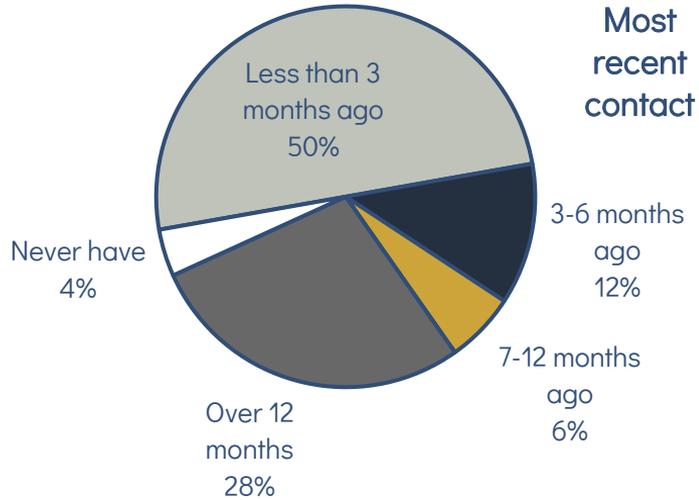
## Overall satisfaction change over the last year



Base: all respondents (as shown)

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# Contact



Region	NW (36)	8.9
	ESW (6)	8.2
	National (3)	8.3
Type	Public affairs (22)	8.9
	NGO (19)	8.6
	Media (4)	8.8

## Satisfaction with most recent contact

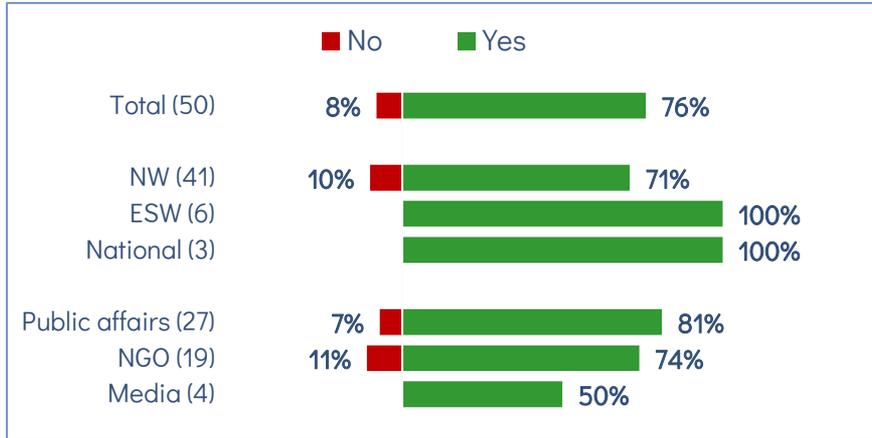


Base: have had contact, where answer given (45)

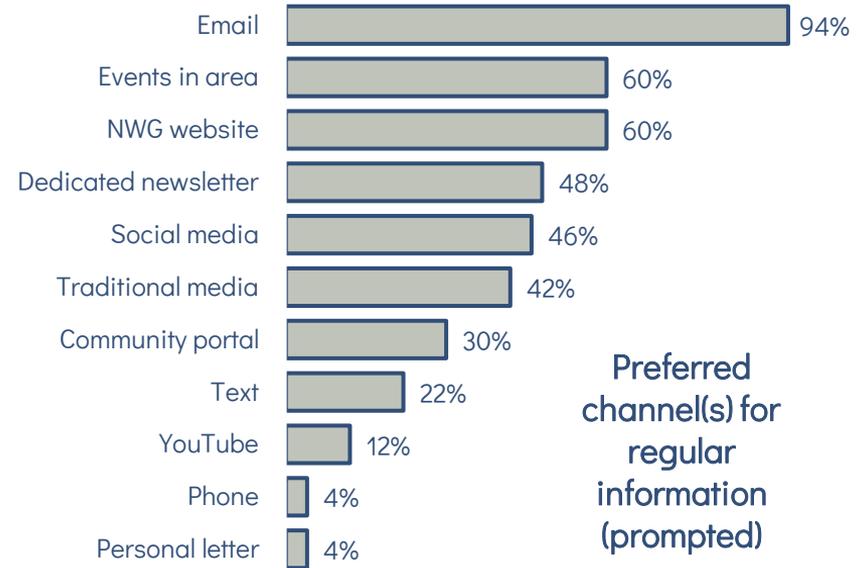


# Information

## Been supplied with all the info wanted



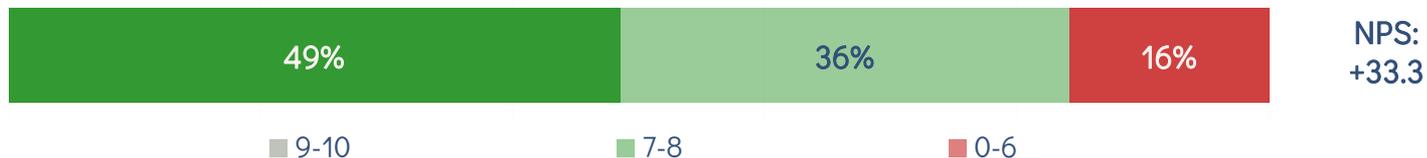
Base: all respondents (as shown)





# NPS

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



Base: all respondents, where answer given (45)

Region	NW (37)	+35.1
	ESW (6)	+33.3
	National (2)	0.0
Type	Public affairs (24)	+50.0
	NGO (17)	+23.5
	Media (4)	-25.0

I've known Northumbrian Water and worked with them for 30 years. I've worked for other water authorities and Northumbrian Water are streets ahead. We've got a very good professional relationship with them and they do what they say really

They are a very efficient organisation and they have a keen sense of community obligation

All the dealings I have had have been fairly good, communications, emails, letters are easy to understand and clear, phone conversations have been pleasant, it's a good image I have of the company

I don't often hear of problems and when there are problems they get sorted out in my experience

Not knowing the opposition. There is no choice. But I always shop around personally for utilities and if there was a choice it would drive down prices

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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	7.5
Provide affordable and inclusive services			7.5	8.2	8.1
Provide reliable and resilient services			8.2	8.5	8.3
Leading in innovation	7.6	7.9	7.3	8.4	8.3
Trust they work with others to improve the environment	7.9	8.2	8.0	8.8	8.3
Contribute to successful economy in region			7.8	8.5	8.2
Company you can trust	8.1	8.2	8.2	8.7	8.5
Leading company in tackling leakage			7.6	7.8	7.6



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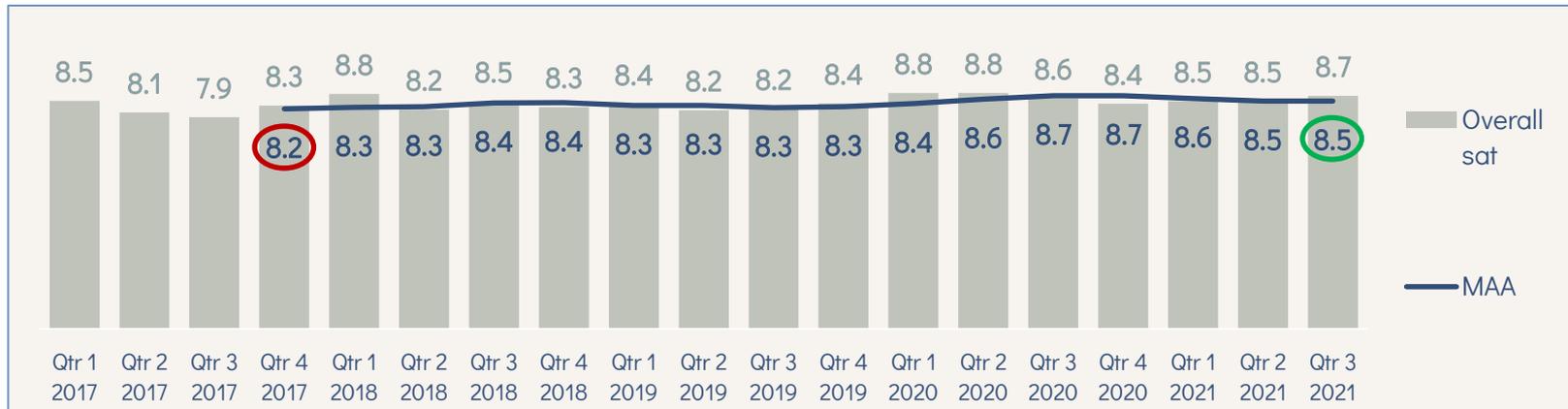
Trust – the moving annual average is significantly higher than it has been previously



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	Qtr2 '21	Qtr3 '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	8.6	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	8.3	8.2	8.1	8.1	8.0
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	8.3	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	8.8	8.9	9.0	8.9	8.8
	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	7.8	8.4

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## Overall satisfaction – the trend is broadly steady



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	Qtr2 '21	Qtr3 '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	8.5	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	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	8.3	8.5
	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	8.7	8.6
	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	8.0	8.3

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The overall NPS measure has improved vs the last couple of years, although the trend has now turned down somewhat



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	Qtr2 '21	Qtr3 '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	43.7	40.2
	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	4.0	12.0
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	31.6	34.9
	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	52.8	45.8
	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	16.7	12.5



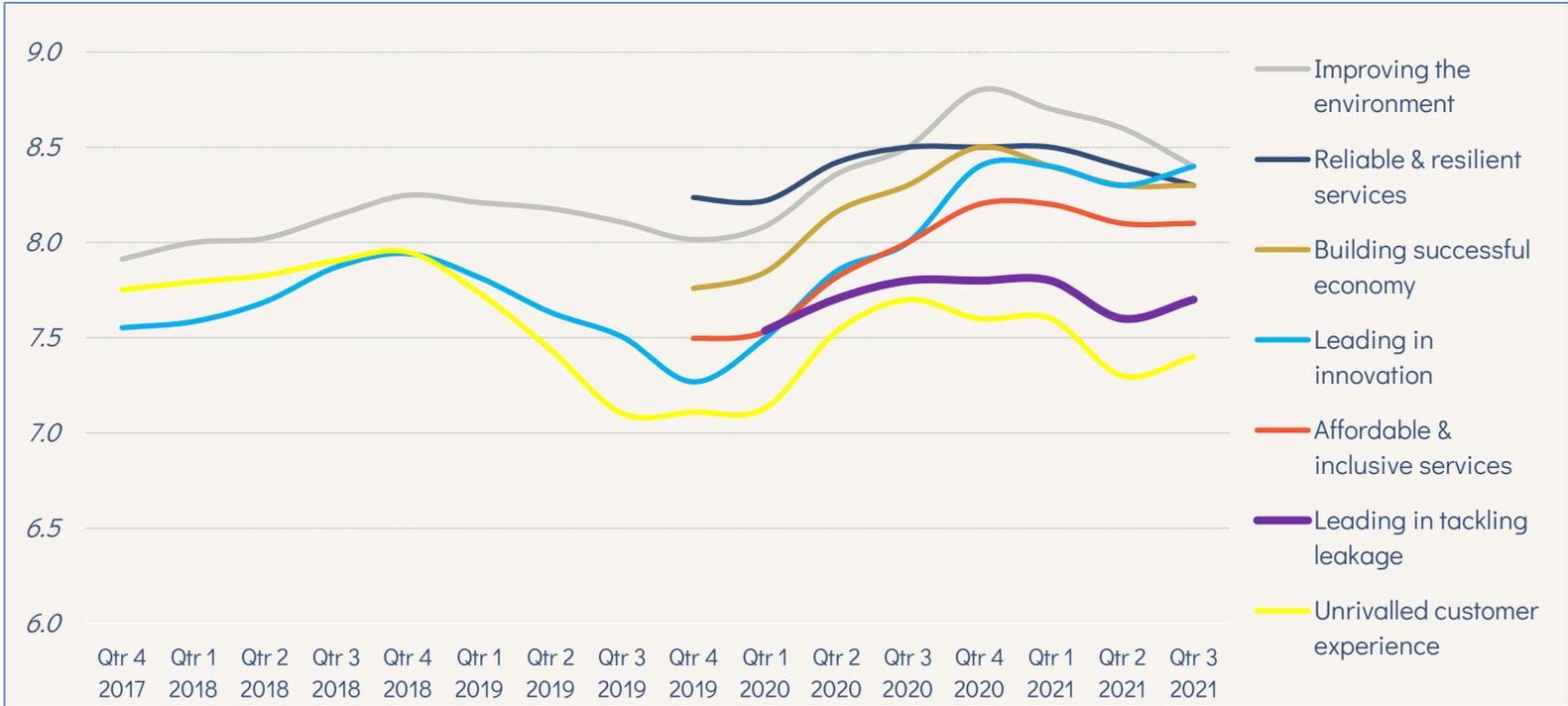
# The contact satisfaction moving annual average is steady



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	Qtr2 '21	Qtr3 '21
Region	NW									8.5	8.6	8.7	8.8	8.8	8.8	8.8	8.8
	ESW									8.4	8.2	8.1	8.2	8.0	8.2	8.3	8.2
Type	Public									8.4	8.4	8.5	8.6	8.8	8.7	8.7	8.8
	NGO									8.7	8.8	8.9	8.9	8.9	8.9	8.9	8.8
	Media									8.4	8.3	8.5	8.6	8.3	8.4	8.5	9.0



The other brand values moving annual averages were showing downward movement, after improvement through 2020 – some may be on the way back





# 79% of stakeholder respondents are supplied by NW or ESW at home

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

SATISFACTION WITH DOMESTIC SUPPLY:	Qtr1 '21	Qtr2 '21	Qtr3 '21
They supply clean and clear drinking water	9.1	9.2	9.3
They supply drinking water that tastes and smells good	9.1	8.8	9.1
They provide a reliable supply of water	9.3	9.4	9.4
They provide sufficient pressure	8.8	9.1	9.0

Base: supplied by NW/ESW at home (37)



DEFINING THE **CLEAREST** DIRECTION

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THANK YOU



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