



27 / 11 / 20

Stakeholder Tracker

Results: Quarter 4 2020

Our ref. J3069.3



DEFINING THE **CLEAREST** DIRECTION

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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

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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

Qtr4 2020

Fieldwork carried out:

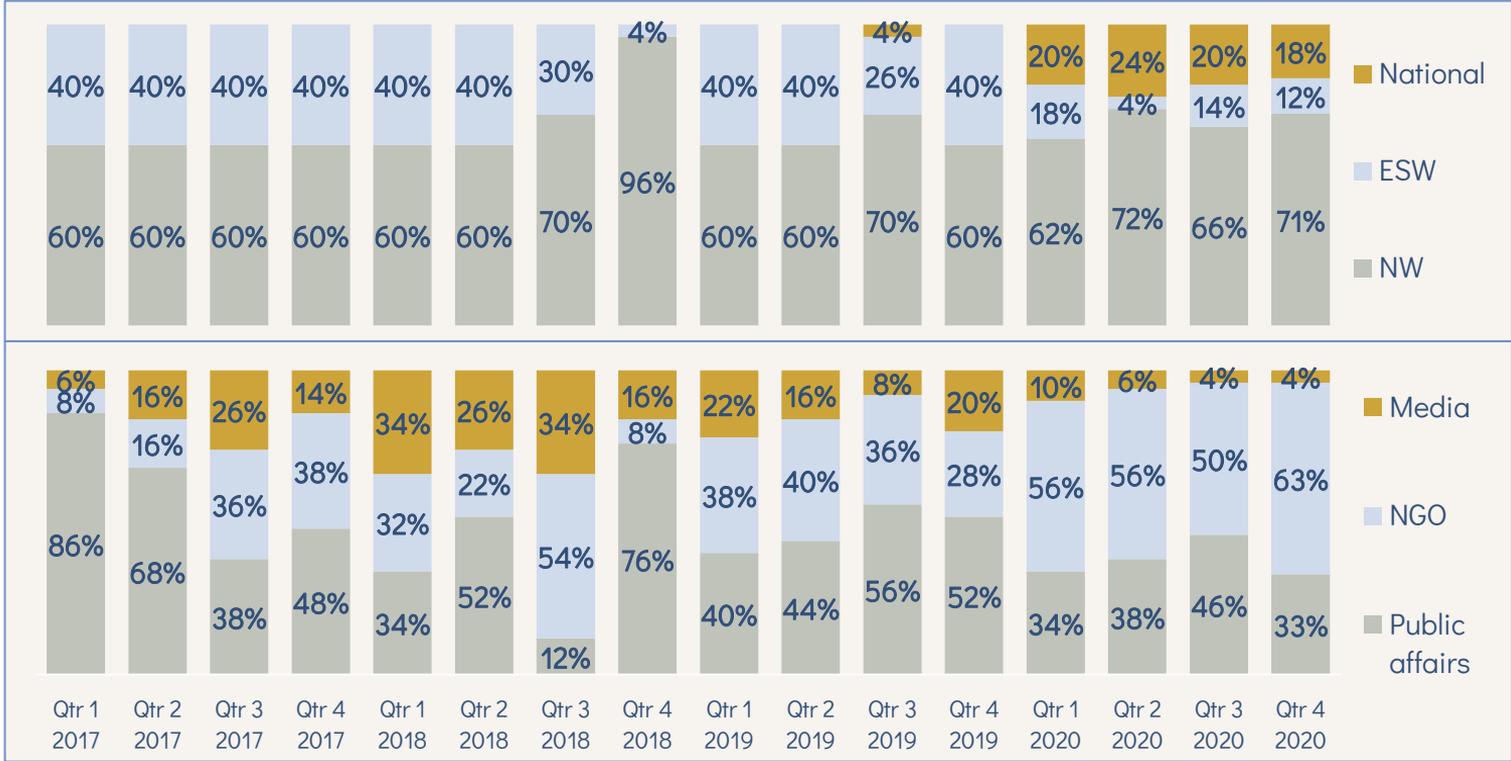
10 – 24 November 2020

(Due to the Covid-19 restrictions, many stakeholders were still not back in the office)

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

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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

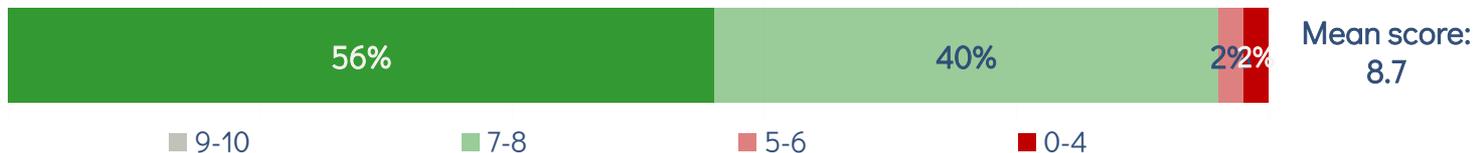


(Qtr4 '18 – 25 interviews)



Trust

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



Base: all respondents, where answer given (50)

Region	NW (36)	8.8
	ESW (6)	7.7
	National (9)	8.9
Type	Public affairs (17)	8.3
	NGO (32)	8.9
	Media (2)	8.0

The way in which they have built up a rapport with us, the chamber and their business audience - they are very informative. A genuine caring attitude towards their business customers and the environment they work in

We've asked for help in recent weeks, and they have come forward fantastically in supporting our branch. They have helped us to be there for the public

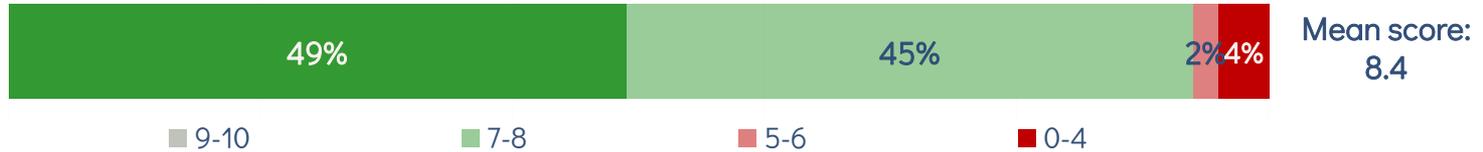
I positively engaged with their staff on initiatives to support vulnerable customers, and I have found them to be straightforward, practical, engaged and reliable. They have been really supportive of us and have given us promises that are being honoured, so a thumbs up

It's the people who are part of the company - having known them for many years, I find them very engaging, very plausible, and I trust them. I have known them for 15, 20 years. I've been involved with numerous people and have found them all very plausible, trustworthy people. It's not the corporate body, it's the individuals



Overall satisfaction

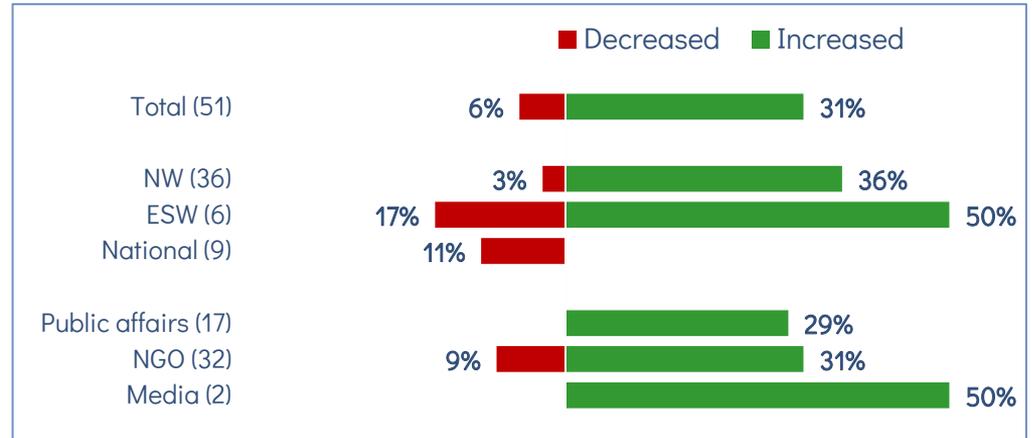
How satisfied are you overall with NWG (10 = very satisfied, 0 = very dissatisfied)



Base: all respondents, where answer given (47)

Region	NW (36)	8.4
	ESW (6)	8.5
	National (9)	8.3
Type	Public affairs (17)	8.4
	NGO (32)	8.4
	Media (2)	9.0

Overall satisfaction change over the last year

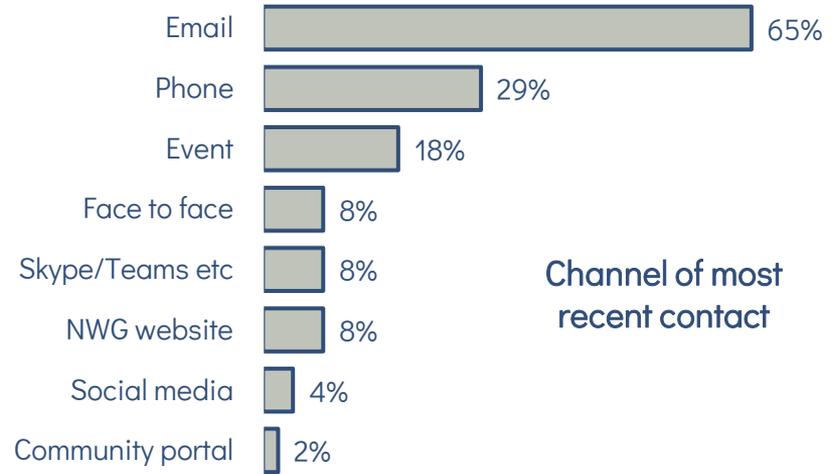
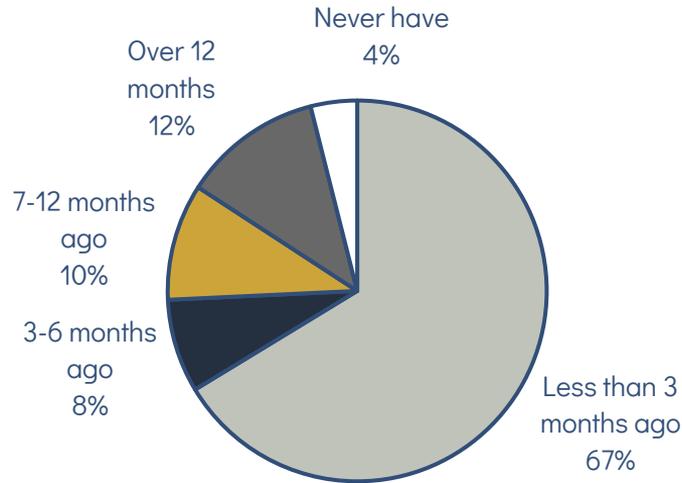


Base: all respondents (as shown)



Contact

Most recent contact



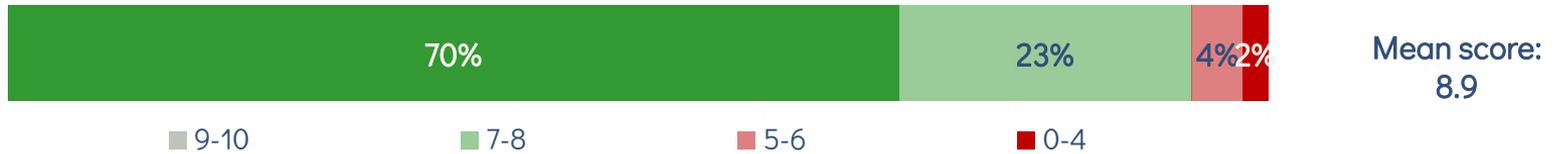
Channel of most recent contact

Base: have had contact, where answer given (47)



Contact

Satisfaction with most recent contact



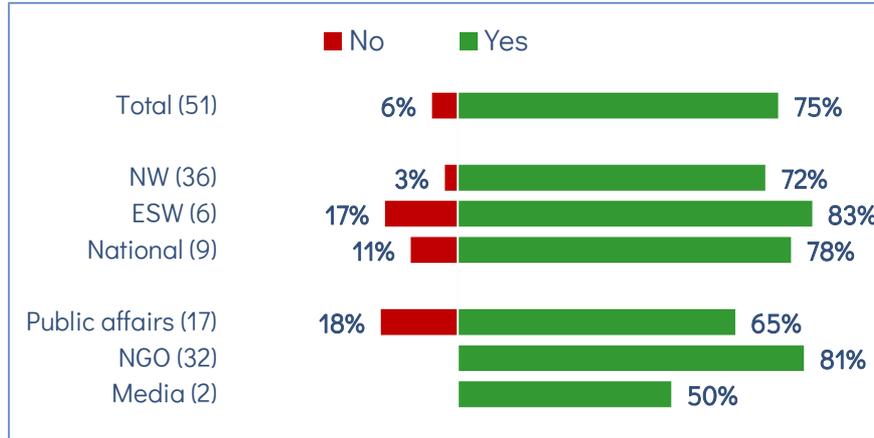
Region	NW (35)	8.9
	ESW (5)	8.0
	National (9)	9.4
Type	Public affairs (15)	9.1
	NGO (32)	8.7
	Media (2)	9.5

Base: have had contact, where answer given (47)

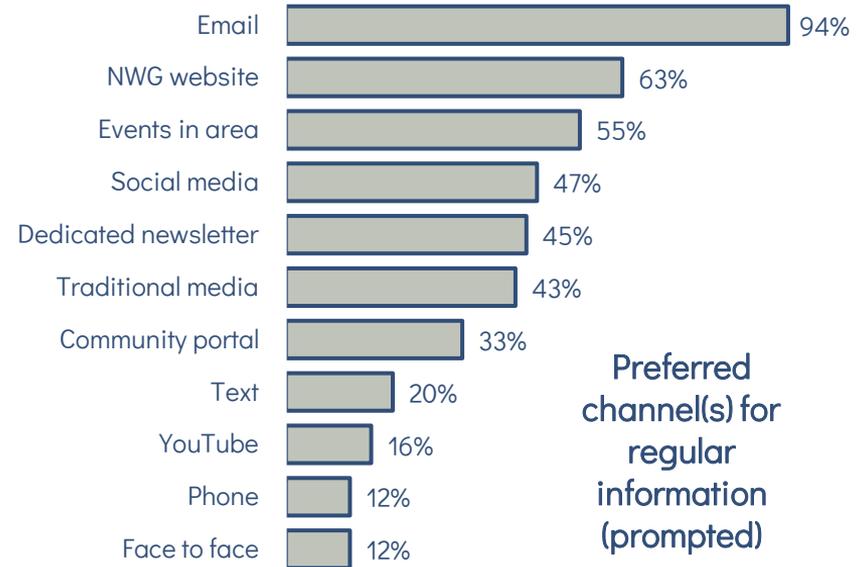
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Information

Been supplied with all the info wanted



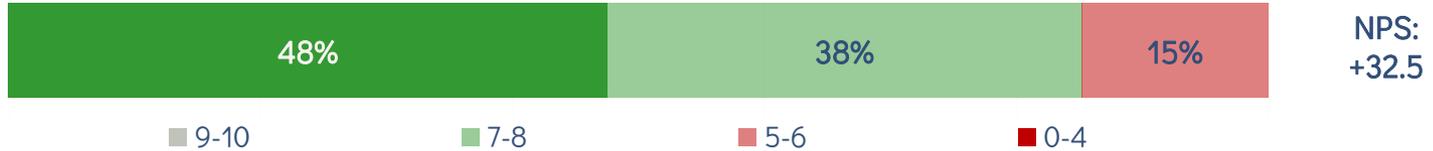
Base: all respondents (as shown)





NPS

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



Base: all respondents, where answer given (40)

Region	NW (36)	+32.3
	ESW (6)	0.0
	National (9)	+75.0
Type	Public affairs (17)	+38.5
	NGO (32)	+28.0
	Media (2)	+50.0

I think their moral compass is in the right place. They are an exemplar of responsible business practice through care for their own people, their customers and local communities, and for the environment

They've got a really good reputation locally and nationally. They win lots of awards. As a business customer, we've had no issues through the retail arm. They also very much commit to the communities in which they operate, whether it's local schools or the business community

Whenever I've had issues, they have always dealt with them. They are swift and efficient

3 reasons: 1) I think the overall pricing structure is one of the most competitive in the water industry. 2) the culture of the organisation towards its customers is a highly developed, sophisticated one. Very responsive to customers. 3) as water companies go, it has one of the highest levels for service on environmental outcomes

I think their ethos is, on the whole, pretty good and my experience of working with them backs that up. They support things that I am interested in beyond their core business that I value

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Brand values – progress monitoring

Brand values	2017 total	2018 total	2019 total	2020 total	2020 Q1	2020 Q2	2020 Q3	2020 Q4
Provide an unrivalled customer experience	7.8	8.0	7.1	7.6	7.7	8.2	7.2	7.1
Provide affordable and inclusive services			7.5	8.2	7.8	8.5	8.2	8.0
Provide reliable and resilient services			8.2	8.5	8.3	8.8	8.5	8.2
Leading in innovation	7.6	7.9	7.3	8.4	8.3	8.4	8.2	8.7
Trust they work with others to improve the environment	7.9	8.2	8.0	8.8	8.5	9.0	8.7	8.8
Contribute to successful economy in region			7.8	8.5	8.3	8.8	8.3	8.5
Company you can trust	8.1	8.2	8.2	8.7	8.6	9.0	8.5	8.7
Leading company in tackling leakage			7.6	7.8	7.4	8.2	7.6	7.8



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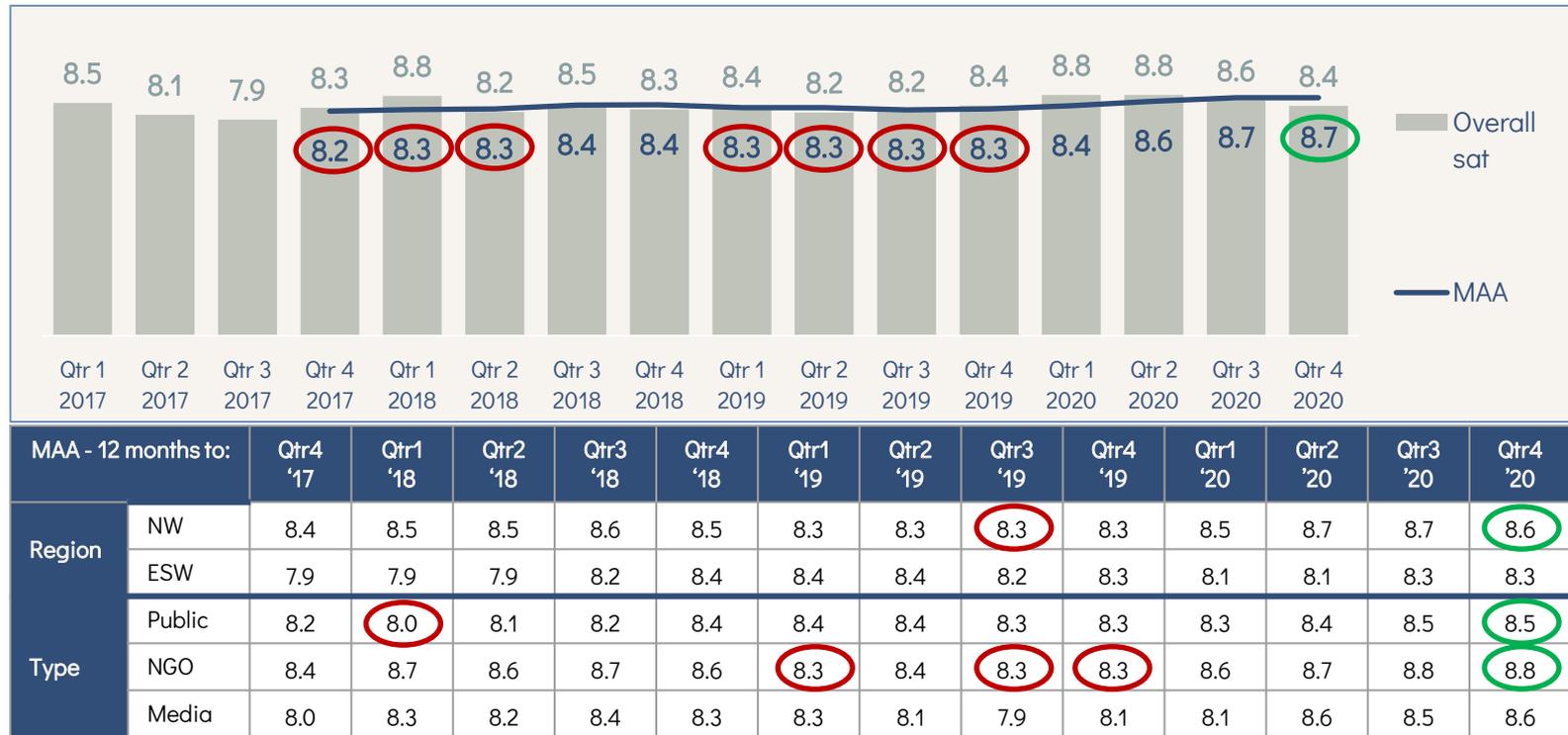
Trust – the moving annual average is now significantly higher than it has been previously



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
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
	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
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
	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
	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



Overall satisfaction – also trending upwards in recent quarters



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The overall NPS measure has improved vs the last couple of years, driven by gains in NW



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
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
	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
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
	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
	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



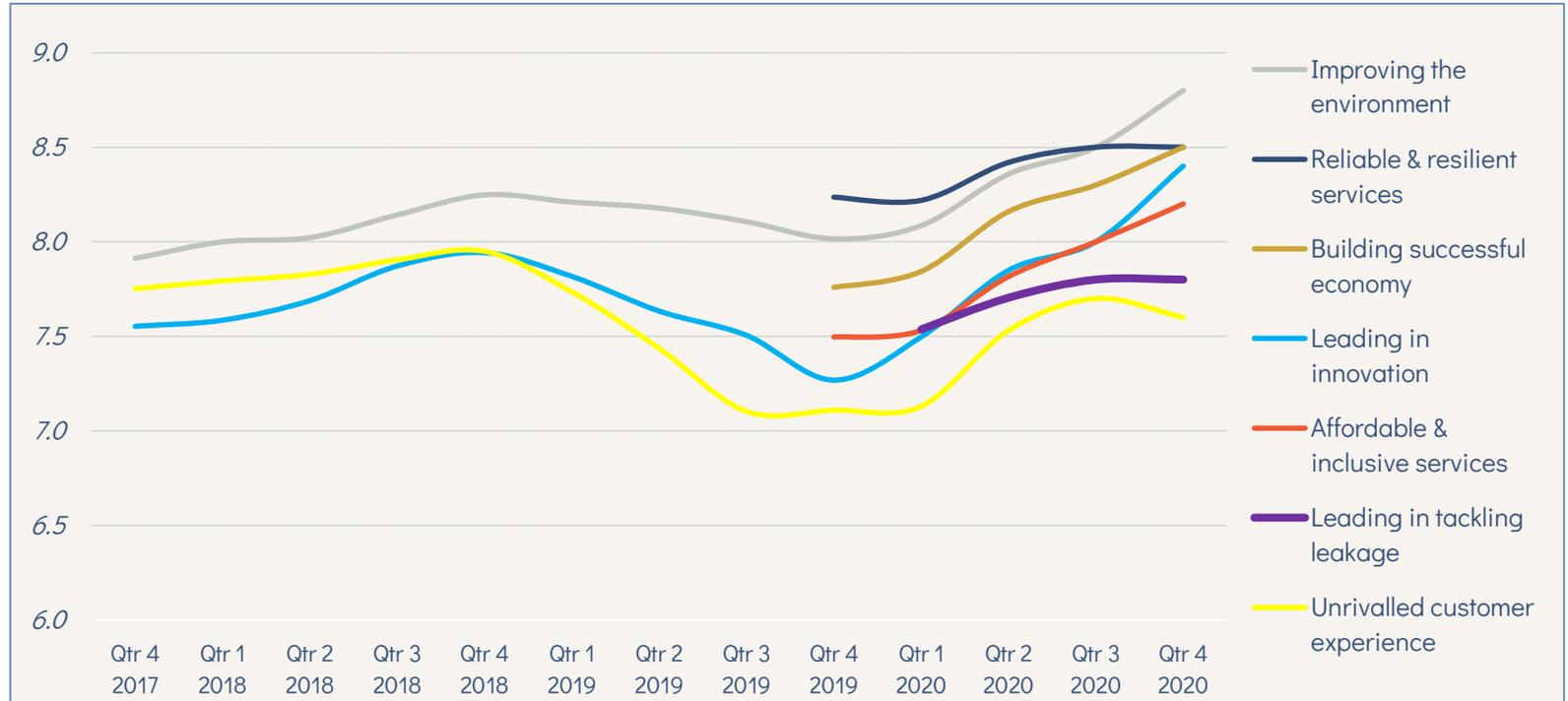
The contact satisfaction moving annual average is trending upwards – but not in ESW



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	Qtr3 '20	Qtr4 '20
Region	NW									8.5	8.6	8.7	8.8	8.8
	ESW									8.4	8.2	8.1	8.2	8.0
Type	Public									8.4	8.4	8.5	8.6	8.8
	NGO									8.7	8.8	8.9	8.9	8.9
	Media									8.4	8.3	8.5	8.6	8.3

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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

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THANK YOU



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

