

# Q4 Stakeholder Tracker

NWG  
07/12/21

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# Introduction

On-going research programme among stakeholders – individuals and organisations who have a professional interest or concern in what the company is doing

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

Fieldwork dates: 4<sup>th</sup> – 11<sup>th</sup> November 2021

Average interview length: 14 min, 8 seconds

Type of business	Interviews
Public	25
NGO	22
Media	3

Covering:

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

Location	Interviews
NW	35
ESW	6
National	9
Total	50

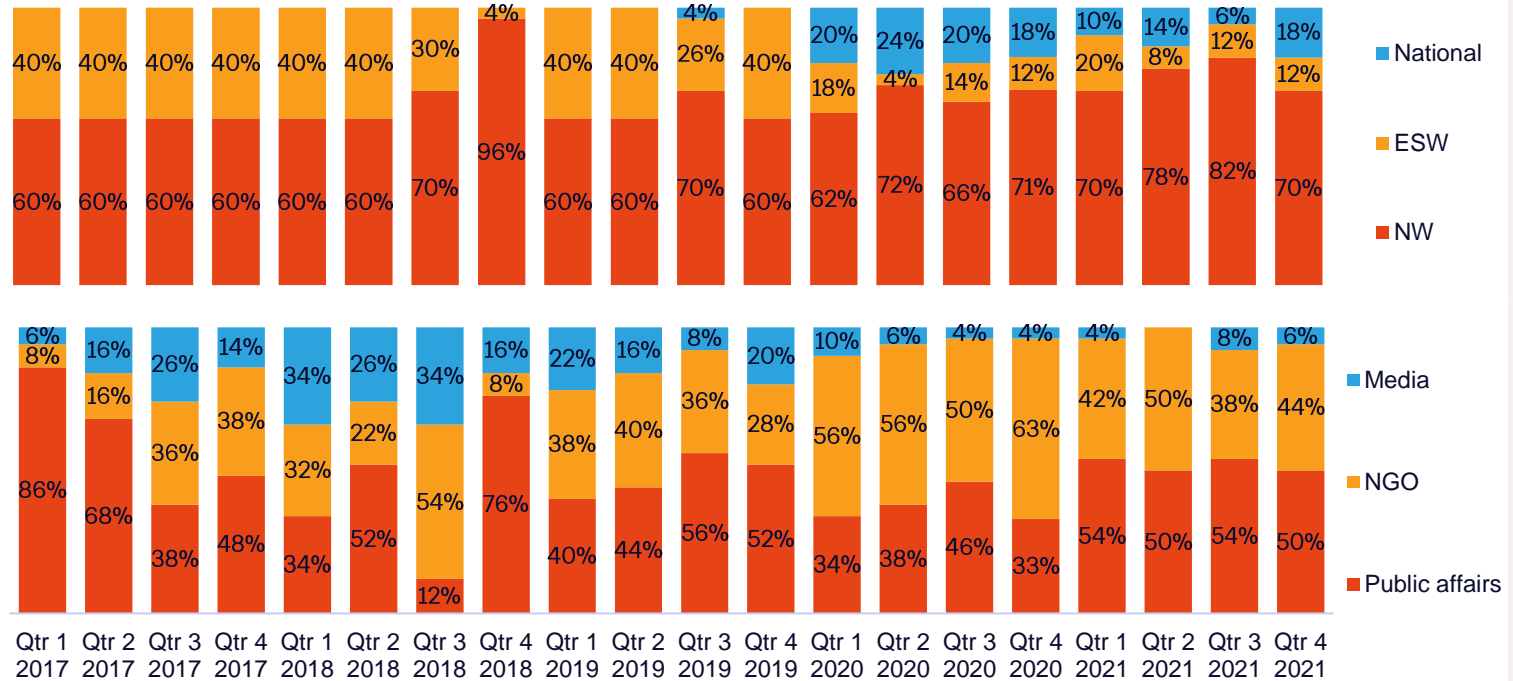


# Sample Profile

**NWG**  
*living water*

**T R I N I T Y**  
**M C Q U E E N**

# 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



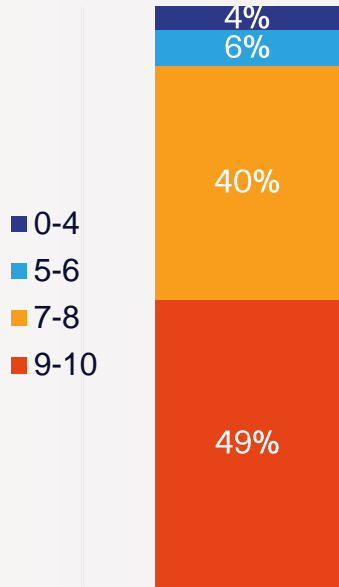
(Qtr4 '18 – 25 interviews)



# Trust & satisfaction with contact and information

# Trust

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



**Mean score: 8.3**

Region	NW (35)	8.4
	ESW (5)	7.4
	National (7)	8.4
Type	Public affairs (25)	8.2
	NGO (20)	8.6
	Media (2)	7.0

“I’ve worked with them on a number of projects and my experience of working with them in relation to other water companies and utilities companies is they are clear about what they do, they are very supportive and flexible, I don’t need to second guess them”

*Trust score 8*

“I think in my dealings with them they are all trying to do a good job, and they are pretty open with me as a stakeholder of theirs. They are trying to uphold the values of the company, looking after customers and the environment, that’s genuine, they are not just trying to greenwash, they are trying to do the right thing.”

*Trust score 8*

“Regular contact, communication, ongoing good relationship in terms of good communication”

*Trust score 10*

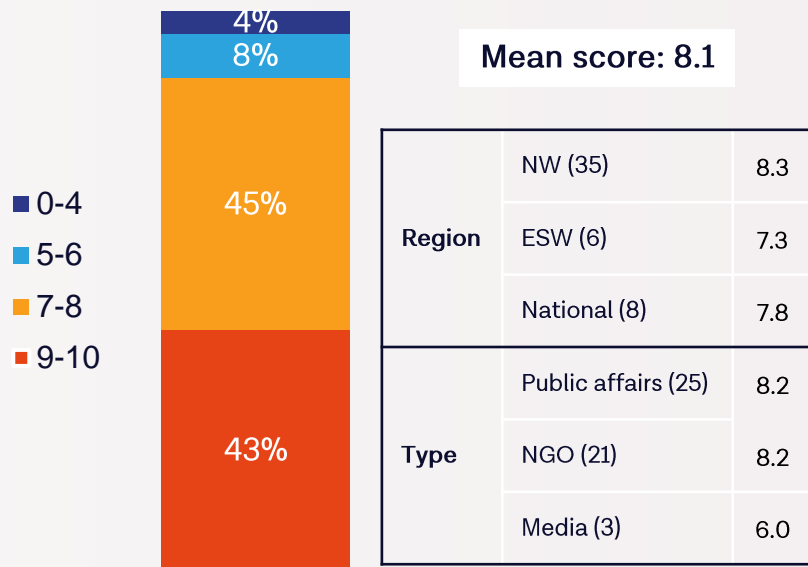
“They’ve got a good reputation. Our company has worked with them for a number of years, they are a diligent company.”

*Trust score 9*

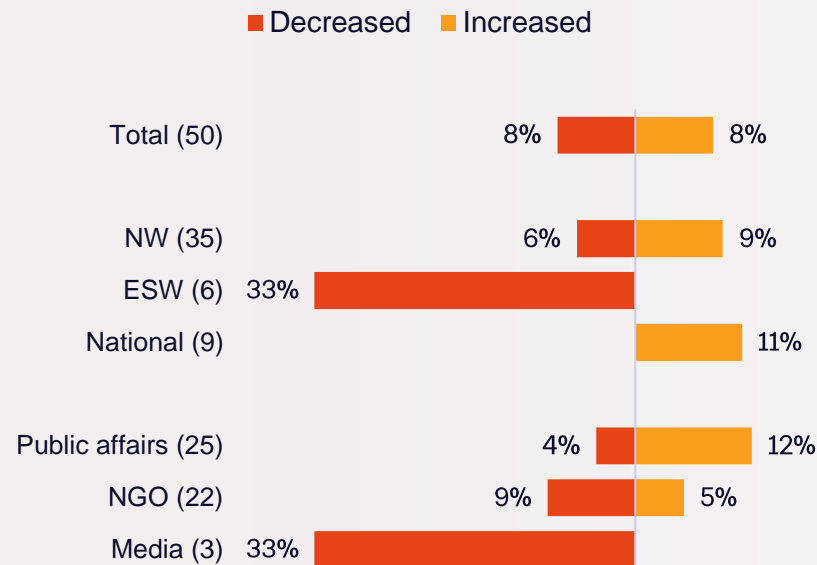
Q7g: Thinking about your overall impressions of [Northumbrian Water / Essex & Suffolk Water / NWG], to what extent would you agree or disagree with the following statements? They are a company that you can trust. Q8 In relation to the statement ‘They are a company that you can trust’, you [gave a score of ... / couldn’t give a score out of 10]. Why is that? Q8: Reason for trust score .Base: Total (50)

# Overall satisfaction

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



Overall satisfaction change over the last year

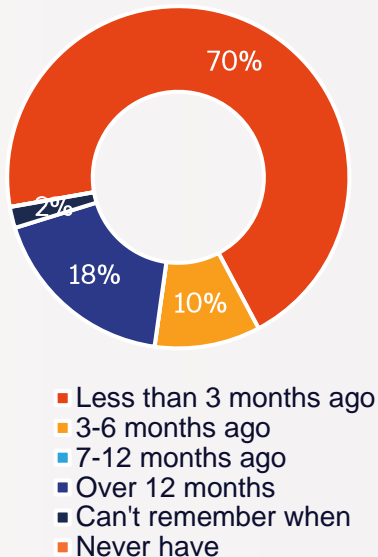


Q5: Now, using a scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied, how satisfied are you overall with [Northumbrian Water / Essex & Suffolk Water / NWG]? Q6: Over the last year, would you say your overall satisfaction with [Northumbrian Water / Essex & Suffolk Water / NWG] has decreased, stayed the same or increased? Base: NWG (50), NW (35), ESW (6), National (9), Public affairs (25) NGO (22) Media (3)

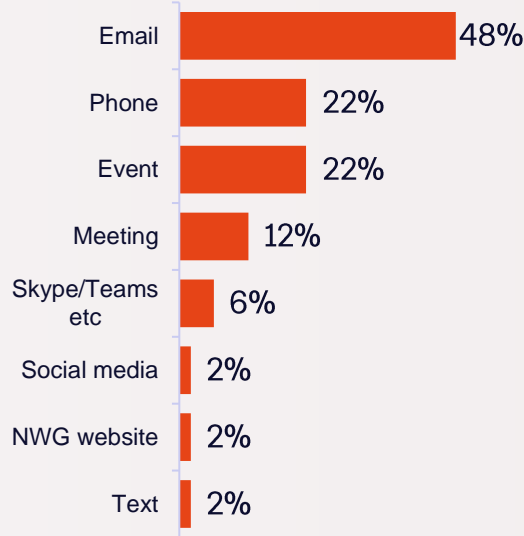


# Contact

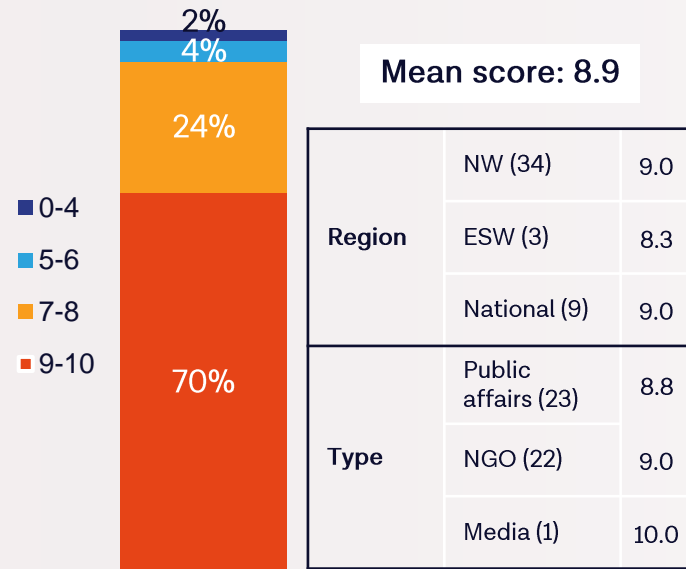
## Most recent contact



## Channel of most recent contact



## Satisfaction with most recent contact



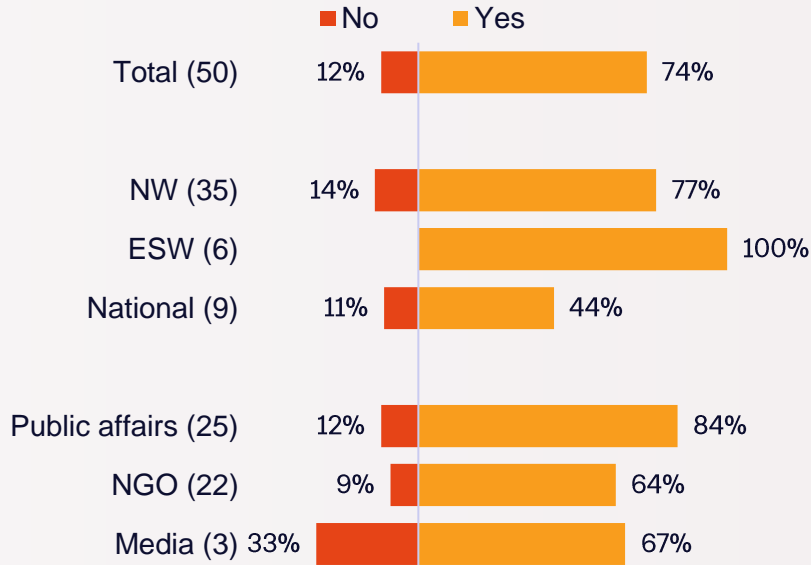
Mean score: 8.9

Region	Count	Mean Score
NW	34	9.0
ESW	3	8.3
National	9	9.0
Type	Count	Mean Score
Public affairs	23	8.8
NGO	22	9.0
Media	1	10.0

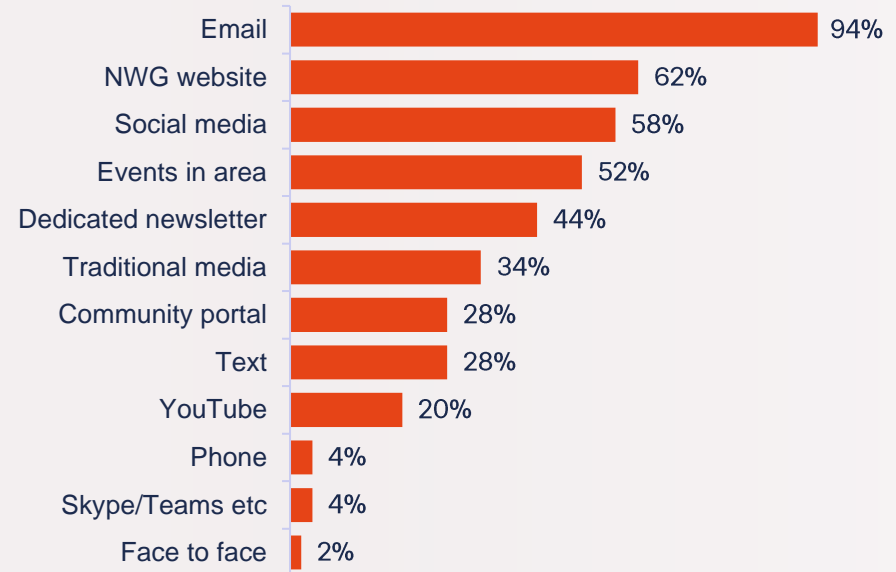
Q2a: When did you last have contact with or from [Northumbrian Water / Essex & Suffolk Water / NWG], in a professional capacity? Q2b: Through which of the following channels was your most recent contact with them? Q2c: How did you feel about this last contact with them - using a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied'? Base: NWG (50), NW (35), ESW (6), National (9), Public affairs (25) NGO (22) Media (3)

# Information

## Been supplied with all the info wanted



## Preferred channel(s) for regular information (prompted)





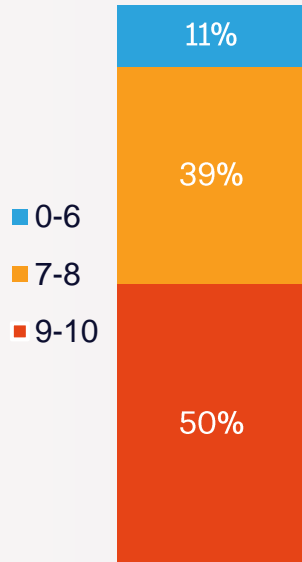
NPS

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# NPS

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



**NPS: +38.6**

Region	NW (31)	+45.2
	ESW (5)	0.0
	National (8)	+37.5
Type	Public affairs (22)	+54.5
	NGO (20)	+20.0
	Media (2)	+50.0

“They are usually pretty good to deal with from a professional point of view and a customer point of view, they always get back to you, and some companies don’t.”

*NPS score 10*

“From my dealings with them they are professional efficient and innovative. They are very attentive to customer needs and understanding customer views.”

*NPS score 8*

“They are quite locally orientated and the staff I deal with care genuinely about the residents of the north east.”

*NPS score 8*

“My involvement is working with them, they are our sister company, my experience of working with them has been very positive, we work closely with them. They do seem to be very progressive as a business, the core values are, they've got the right focus in terms of investment. A responsible business.”

*NPS score 8*

“If ever there is a problem they are always very prompt to respond to it and to resolve the issue.”

*NPS score 10*

Q1: Thank you. Now, if people could choose their water provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water / NWG] to colleagues, friends or family, using a scale of 0 to 10 where 0 is ‘not at all likely’ and 10 is ‘extremely likely’? Q1b: Why do you say that? Base: NWG (50), NW (35), ESW (6), National (9), Public affairs (25) NGO (22) Media (3)

## Brand values – progress monitoring

Brand values	2017 total	2018 total	2019 total	2020 total	2021 total
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	8.2
Leading in innovation	7.6	7.9	7.3	8.4	8.2
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	7.5

Q7a-h: Thinking about your overall impressions of [Northumbrian Water / Essex & Suffolk Water / NWG], to what extent would you agree or disagree with the following statements? Base total (200)



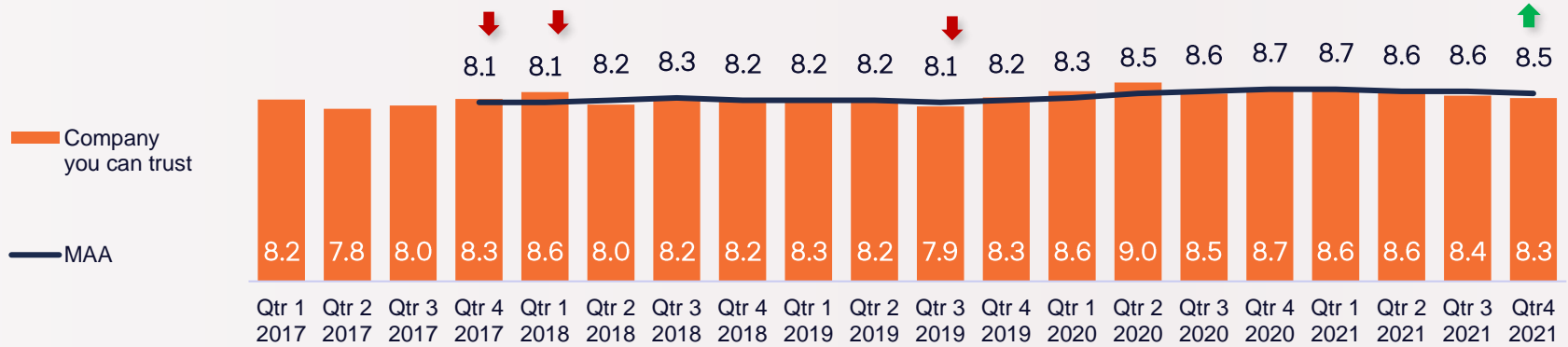
# MAA comparison

*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.*

# Trust

The moving annual average is has remained stable for the past year



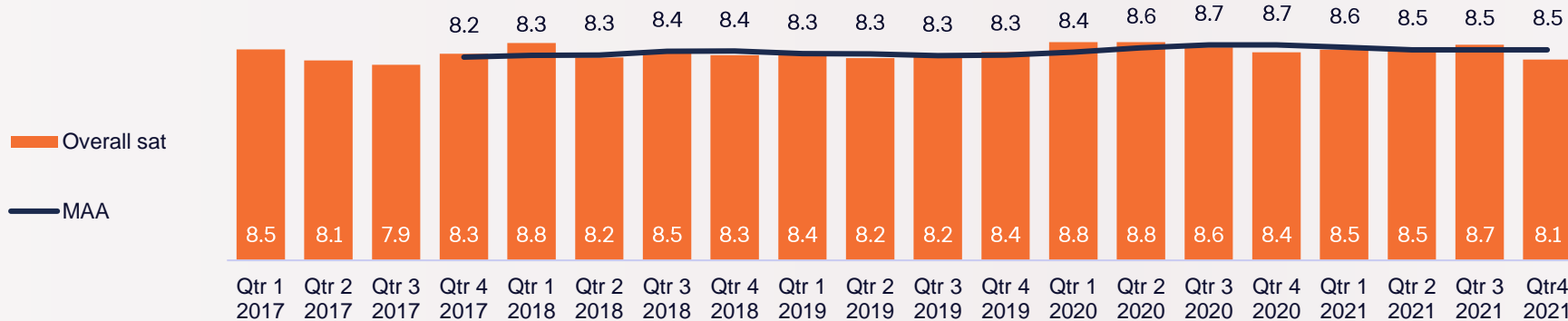
MAA - 12 months to:		Qtr 4'17	Qtr 1'18	Qtr 2'18	Qtr 3'18	Qtr 4'18	Qtr 1'19	Qtr 2'19	Qtr 3'19	Qtr 4'19	Qtr 1'20	Qtr 2'20	Qtr 3'20	Qtr 4'20	Qtr 1'21	Qtr 2'21	Qtr 3'21	Qtr 4'21
Region	NW	8.3	8.4	8.5	8.4	8.3	8.3	8.2	8.2	8.2	8.3	8.6	8.6	8.7	8.7	8.6	8.6	8.5
	ESW	7.7	7.7	7.8	7.9	8.1	7.9	8.2	8.1	8.1	8.0	7.9	8.3	8.2	8.1	8.1	8.0	8.0
	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	8.3
Type	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	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	8.1

Q7g: Thinking about your overall impressions of [Northumbrian Water / Essex & Suffolk Water / 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', Why is that? Base total (50), Total MAA (200) NW MAA (150), ESW MAA (26), Public affairs MAA (104), NGO MAA (87), Media MAA (9)



# Overall satisfaction

The trend is broadly steady



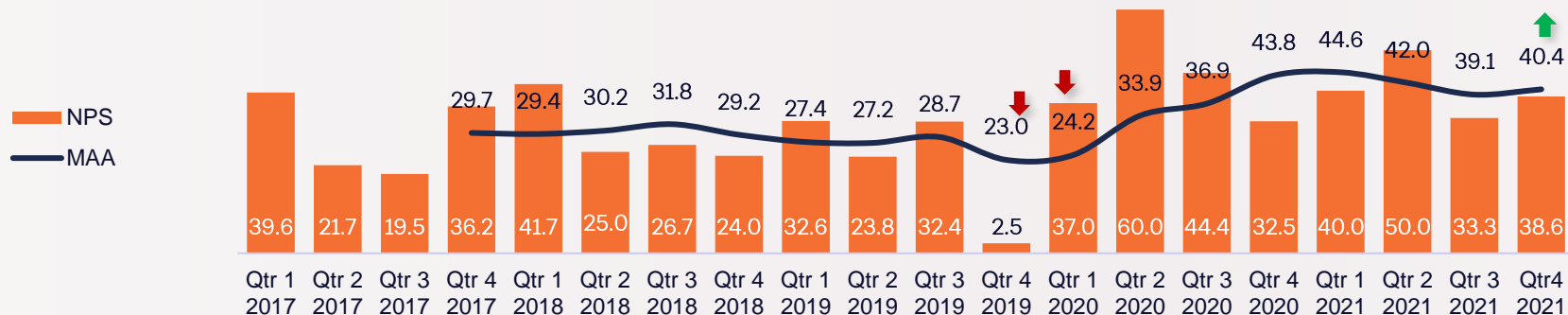
MAA - 12 months to:		Qtr 4'17	Qtr 1'18	Qtr 2'18	Qtr 3'18	Qtr 4'18	Qtr 1'19	Qtr 2'19	Qtr 3'19	Qtr 4'19	Qtr 1'20	Qtr 2'20	Qtr 3'20	Qtr 4'20	Qtr 1'21	Qtr 2'21	Qtr 3'21	Qtr 4'21	
Region	NW	8.4	8.5	8.5	8.6	8.5	8.3	8.3	8.3	8.3	8.5	8.7	8.7	8.6	8.5	8.5	8.5	8.5	
	ESW	7.9	7.9	7.9	8.2	8.4	8.4	8.4	8.2	8.3	8.1	8.1	8.3	8.3	8.3	8.3	8.3	8.3	8.1
	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	8.4	
Type	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	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	7.3	

Q5: Now, using a scale of 0 to 10, where 0 is very dissatisfied and 10 is very satisfied, how satisfied are you overall with [Northumbrian Water / Essex & Suffolk Water / NWG]? Base total (50), Total MAA (200) NW MAA (150), ESW MAA (26), Public affairs MAA (104), NGO MAA(87), Media MAA (9)

↑↓ Significantly higher/Lower 17

# NPS

The overall NPS measure has improved vs the last couple of years, although the trend was down last quarter it is now on par with the previous quarters



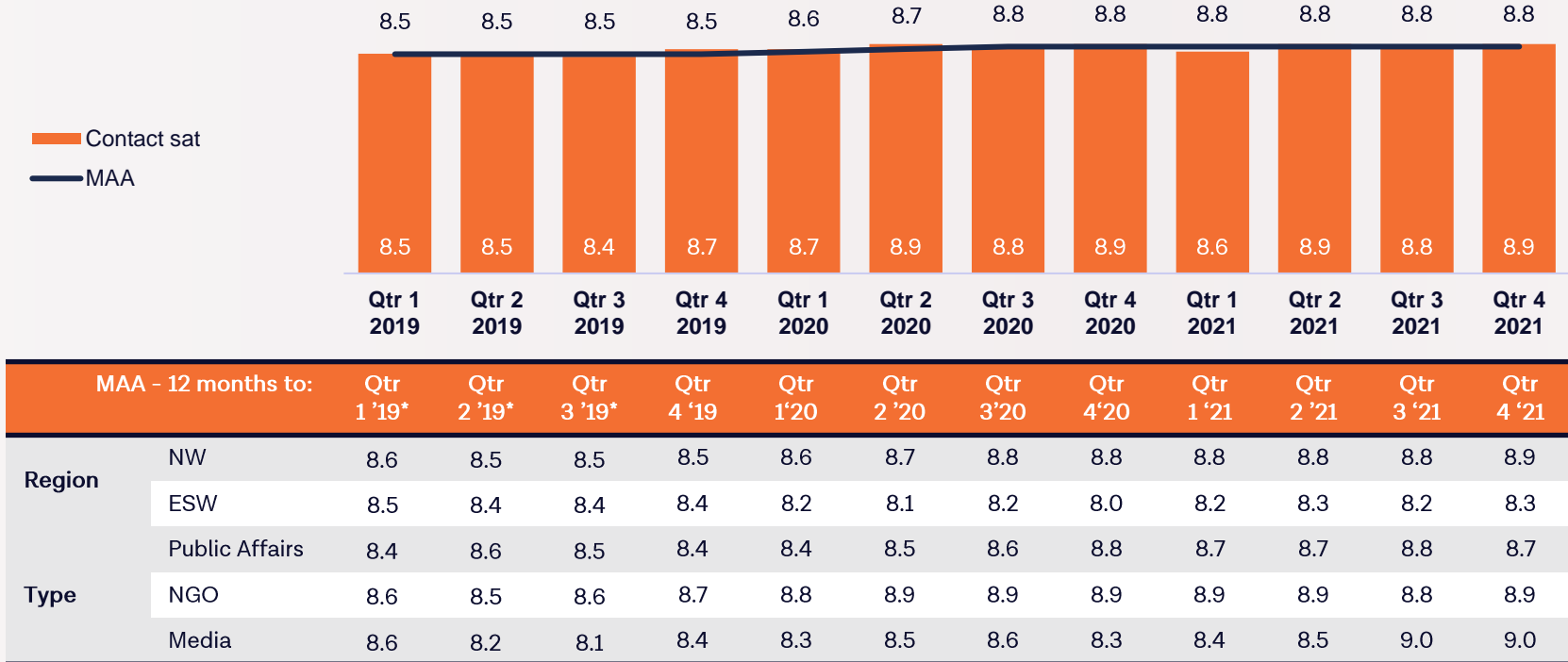
MAA - 12 months to:		Qtr 4'17	Qtr 1'18	Qtr 2'18	Qtr3 '18	Qtr 4'18	Qtr 1'19	Qtr 2'19	Qtr 3'19	Qtr4 '19	Qtr 1'20	Qtr 2'20	Qtr3 '20	Qtr 4'20	Qtr 1'21	Qtr 2'21	Qtr3 '21	Qtr 4'21
Region	NW	39.1	44.6	43.6	40.5	32.7	29.2	27.8	33.3	31.4	38.7	50.0	47.5	50.8	48.0	43.7	40.2	43.2
	ESW	15.3	7.2	11.3	16.9	21.3	23.5	26.0	19.1	8.5	-4.1	-24.2	-13.3	-4.5	0.0	4.0	12.0	12.0
	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	39.1
Type	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	44.9
	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	12.5

Q1: Thank you. Now, if people could choose their water provider, how likely would you be to recommend [Northumbrian Water / Essex & Suffolk Water / NWG] to colleagues, friends or family, using a scale of 0 to 10 where 0 is 'not at all likely' and 10 is 'extremely likely'? Base total (50), Total MAA (200) NW MAA (150). ESW MAA (26). Public affairs MAA (104). NGO MAA(87). Media MAA (9)

↑ ↓ Significantly higher/Lower 18

# Contact satisfaction

The moving annual average is consistent with the past 5 quarters



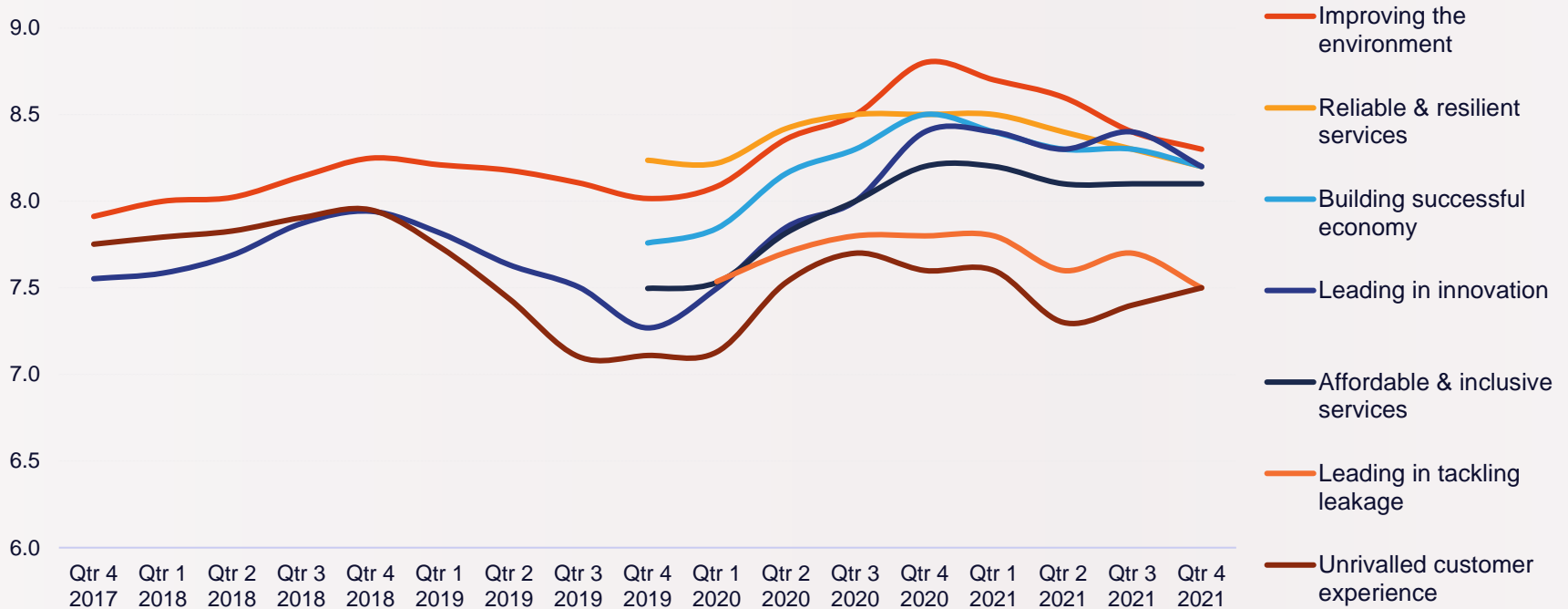
Q2c: How did you feel about this last contact with them - using a scale of 0 to 10 where 0 is 'very dissatisfied' and 10 is 'very satisfied'? Base total (50), Total MAA (200) NW MAA (150), ESW MAA (26), Public affairs MAA (104), NGO MAA(87), Media MAA (9)

\*Base size lower than 100

↑ Significantly higher/Lower ↓ 19

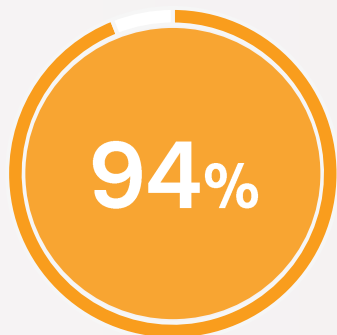
# Other Brand Values

*The moving annual averages continue showing downward movement, after improvement through 2020 - Customer experience has gone up slightly*



Q7a-h: Thinking about your overall impressions of [Northumbrian Water / Essex & Suffolk Water / NWG], to what extent would you agree or disagree with the following statements? Base Total MMA (200)

# 70% of stakeholder respondents are supplied by NW or ESW at home



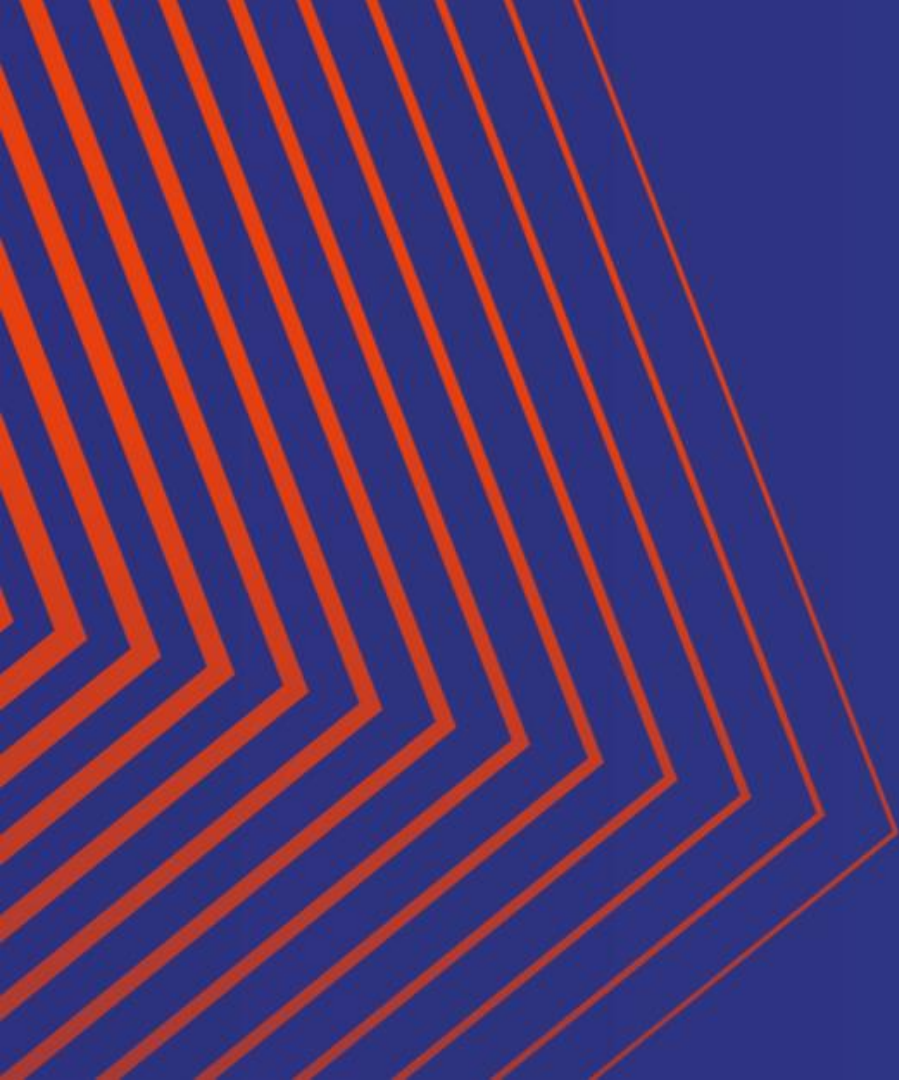
**Of stakeholders who are supplied water at home by NW/ESW prefer tap water over bottled**

## Satisfaction with domestic supply:

	Qtr1 '21	Qtr2 '21	Qtr3 '21	Qtr4 '21
They supply clean and clear drinking water	9.1	9.2	9.3	9.1
They supply drinking water that tastes and smells good	9.1	8.8	9.1	8.7
They provide a reliable supply of water	9.3	9.4	9.4	9.5
They provide sufficient pressure	8.8	9.1	9.0	9.1

Q14: Which company provides your water supply at home? Q16 :To what extent would you agree or disagree with the following statements, about your domestic water supply from. Base: Total (50)

Q17:If you had to choose, would you drink tap water or bottled water? [Northumbrian Water / Essex & Suffolk Water]? Base: Supplied by NW/ESW at home (35)



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