Image Tracker October-December 2024

Report

January 2025

Methodology changes

	'21/ '22 – '23/ '24	'24/ '25	Q3 '24/25
Sample definition	All adults 18+ living in the Wessex Water region.		
Demographic profile	Demographic profile weighted to match ONS (2019-20) for Wessex Water region Supply areas represented in actual proportions		
Interview method	**50%** telephone **50%** online survey	**20%** telephone **80%** online survey	**20%** telephone **80%** online survey
Sample source	**Panel** sample	**Customer** sample (from Wessex Water)	**Customer** sample (Wessex Water) **Online panel**
Bill payer status	80% bill payers 20% non-bill payers	100% bill payers only	90% bill payers 10% non bill payer (n=43)

Note: Give that the sample size for non-bill payers is 43/691 for Q3 24/25, we have decided to report the total (but will make note if the differences between bill payers and non bill payers in the latest Quarter are significant throughout the report.

Note on new segmentation (2024)

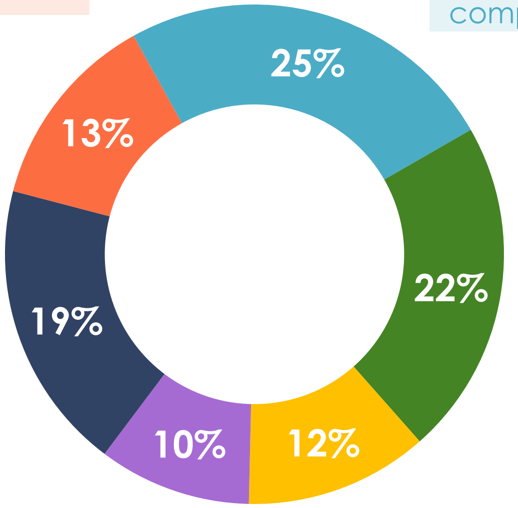
Customers are assigned into one of 6 segments. The segments are based on the segmentation from November 2024 – which comprised a quantitative survey amongst Wessex Water customers, as well as focus groups.

There is some variation in the sizes of segments, and this should be taken into account when considering the opportunity each represents.

Segment 6: Care-Free Consumers
Climate change sceptical – unwilling to make changes for environmental purposes, do not believe in or care about the issues and are negative about bills. High water consumption and uninterested in changing.

Segment 1: Responsible Environmentalists
Action-oriented environmentalists – passionate about making eco changes and are likely to already be taking steps to reduce consumption. Knowledgeable on the topic and more positive company outlook.

Segment 5: Pro-Planet Advocates
Climate anxious, company criticals – strongly pro-eco action and feel it's important we all do our bit. Would be prepared to do more, negative company outlook but has room to know more about Wessex Water.



Segment 2: Lifestyle Empowered
Comfortable, information driven, more families – fairly concerned about the environment, willingness to put money into water saving devices, prioritise values of hygiene and relaxation. Diverse media consumption, using many sources.

Segment 4: Frugal Traditionalists
Disengaged and lacking concern – environment isn't top priority though and have some scepticism and budget concerns. *Some* openness for change due to having less water-intensive behaviours already.

Segment 3: Convenience Cost-Savers
Younger, occupied, more families – enjoy relaxing and daily bathing, some environmental concerns but less proactive, feel a bit more negatively/less trusting towards Wessex Water.

Headline Summary: October-December 2024

1. Satisfaction with value for money continues to decline. Fewer consider their water bills affordable, with about a third feeling anxious about being able to afford them. Awareness of financial assistance also continues to fall.

2. Reliable water supply remains the top customer priority. 'Supporting customers who struggle to pay their bills' remains high in this Quarter as well.

3. The proportion of customers feeling 'very knowledgeable' about Wessex Water is higher than previous years. In addition to more customers being able to recall Wessex Water on the news, a greater proportion of customers also recall interactions with the website and other forms of contact, which coincides with greater satisfaction in being able to contact Wessex Water.

4. Water saving behaviours hold steady, with half of customer reporting that they reduce flushing and bathing. However, about 1 in 10 customers in the latest Quarter are uncertain about installing 'eco-showers' – could there be an opportunity to educate customers on its benefits?

5. Customers continue to mention the environment as an area that Wessex Water needs to further improve on/address – particularly with regards to sewage spillages. Relating to sewage spillages, awareness of storm overflows is still high, with the news remaining the top source of information on this matter.

6. Most customer understand population growth and infrastructure limitations are significant contributors to storm overflow usage, while many continue to be uncertain about the impact of personal actions (e.g. water butt usage etc.). 1 in 10 customers are aware of Wessex Water's efforts in mitigating the use of storm overflows, with 2 in 5 of those aware learning from Wessex Water's magazine and emails.

Wider context

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Overall context: October-December 2024

News in the latest Quarter was dominated by rising costs, including utility bills and tax increases, putting additional pressure on households. There was also a series of intense storms that caused nationwide disruption and infrastructure damage.

Timeline of key events

2023

O N D

- **7 Oct** Hamas attacks triggering Israeli Palestinian war
- **18 Oct** Storm Babet
- **28 Oct** Ofwat annual report flagged the financial health of four water companies
- **1 Nov** Storm Ciarán
- **Nov** UK interest rates drop to 3.9%
- **9 Dec** Storm Elin and Fergus
- **27 Dec** Storm Gerrit
- **27 Dec** Media articles claiming that HH water bills could rise by over £800 in 2024

2024

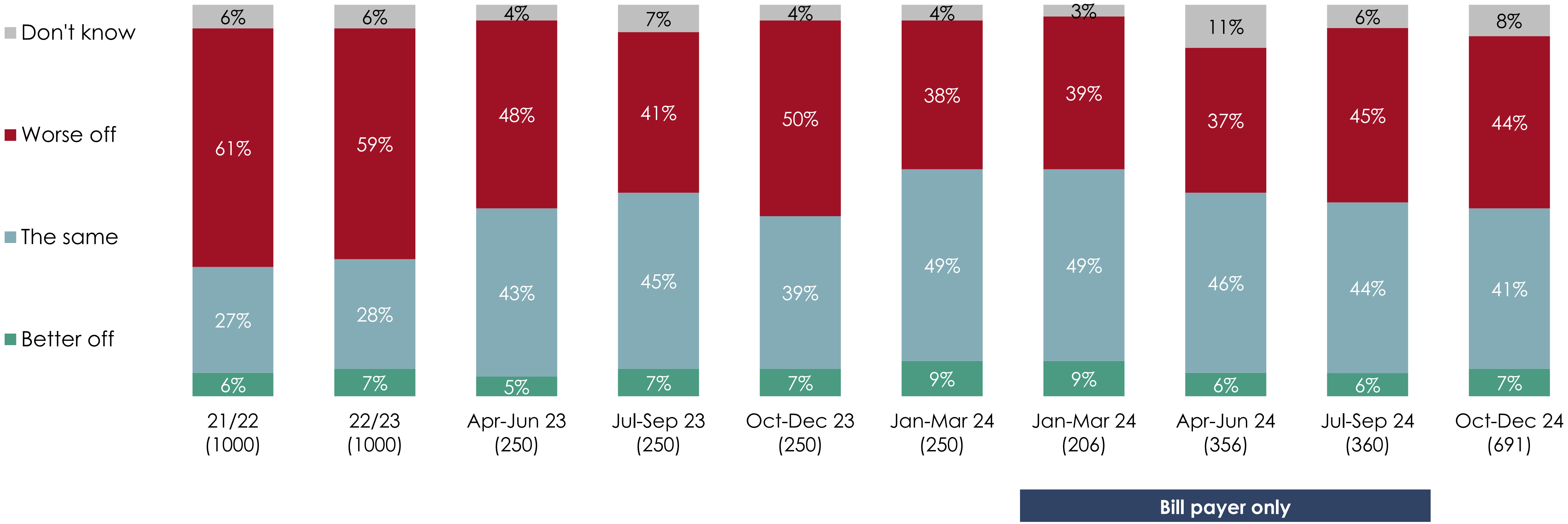
J F M A M J J A S O N D

- **2 Jan** Storm Henk
- **11 Jan** Missile strikes in Yemen
- **19 Jan** Storm Isha
- **22 Jan** Storm Jocelyn
- **2 Feb** Water UK says average annual water bill is expected to increase by 6% in England and Wales
- **Feb** 2nd wettest February for Wessex since records began
- **12 Mar** Thames Water refused to pledge towards Defra initiative
- **20 Mar** Environment Agency data published that sewage discharge doubled in England in 2023
- **5 Apr** Thames Water's parent company tells creditors it has defaulted on its debt
- **6 Apr** Storm Kathleen
- **2 May** Local government elections
- **10 May** ONS publishes figures showing UK moves out of recession, with GDP rising by 0.6% in Q1
- **22 May** Rishi Sunak announces General Election to be held in July
- **14 Jun** UEFA Euro 24
- **15 Jun** Heatwave, with some areas of the UK reaching 30C
- **1 Jul** Ofgem lowers energy price cap
- **4 Jul** General Election/ Labour wins
- **26 July** Olympics begin
- **1 Aug** Drop in mortgage rates
- **6 Aug** UK riots
- **Sep** News about post-election budget
- **1 Oct** Ofgem energy cap increases & bills see increase
- **16 Oct** UK inflation falls to lowest level in 3 years
- **30 Oct** UK budget revealed, incl £40bn in tax rises and increased funding for NHS
- **7 Nov** BOE cuts interest rates by 0.25%
- **19 Nov** Yellow snow warnings, disruptions across UK
- **26 Nov** Yellow weather warnings ahead of Storm Conall
- **7 Dec** Storm Darragh, red weather warning
- **19 Dec** Ofwat publishes Final Determi-nations for PR24

Financial outlook is relatively stable compared to the previous Quarter.

Billpayers and older customers are more likely to feel pessimistic about their future finances. There are no significant differences between customer segments in terms of financial outlook

QF5. Thinking about the current economic climate, do you expect your household to be better off, worse off or about the same in the next 12 months? *Base: All respondents*



Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Reliable water supply and preventing sewage leaks remain the top priorities for Wessex Water.

Improving local habitats and reducing carbon emissions are less of a priority for the 'Frugal Traditionalist' segment, while investing to address future extremes is a greater priority for the 'Responsible Environmentalists' segment.

Q7. How important do you think it is for Wessex Water to focus on each of the following things?
Mean score (10 = 'a top priority' 0 = 'not a priority'). *Base: All respondents*

	Q3 24/25 (691)	Q2 24/25 (360)	Q1 24/25 (356)	Q4 23/24 (206)	23/24 (1000)	22/23 (1000)
Ensuring a reliable water supply	9.6	9.6	9.6	9.4	9.2	9.2
Preventing sewage leaks into / entering rivers and the environment	9.3	9.2	9.4	9.3	8.9	8.9
Giving great customer service	8.9	8.9	8.9	8.6	8.5	8.5
Investing to address future extremes in weather like drought and flooding	8.7	8.7	8.8	8.1	7.9	7.9
Supporting customers who struggle to pay their bills	8.2	8.2	8.0	8.0	7.5	6.9
Improving local habitats for plants and animals	8.1	8.1	8.4	8.6	8.4	8.4
Working with communities e.g working together locally to improve the environment/save water**	8.0	8.1	8.3	8.2	8	8.1
Reducing their own carbon emissions	7.6	7.9	8	7.9	7.7	7.8
Being innovative and quick to launch new technologies	7.5	7.5	7.7	7.5	7.3	7.4
Promoting social equality and equal opportunities	7.1	7.1	7.1	7.1	7.1	7.2

Bill payer only

New wording introduced at Q2 2023-4**
Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Core Measures

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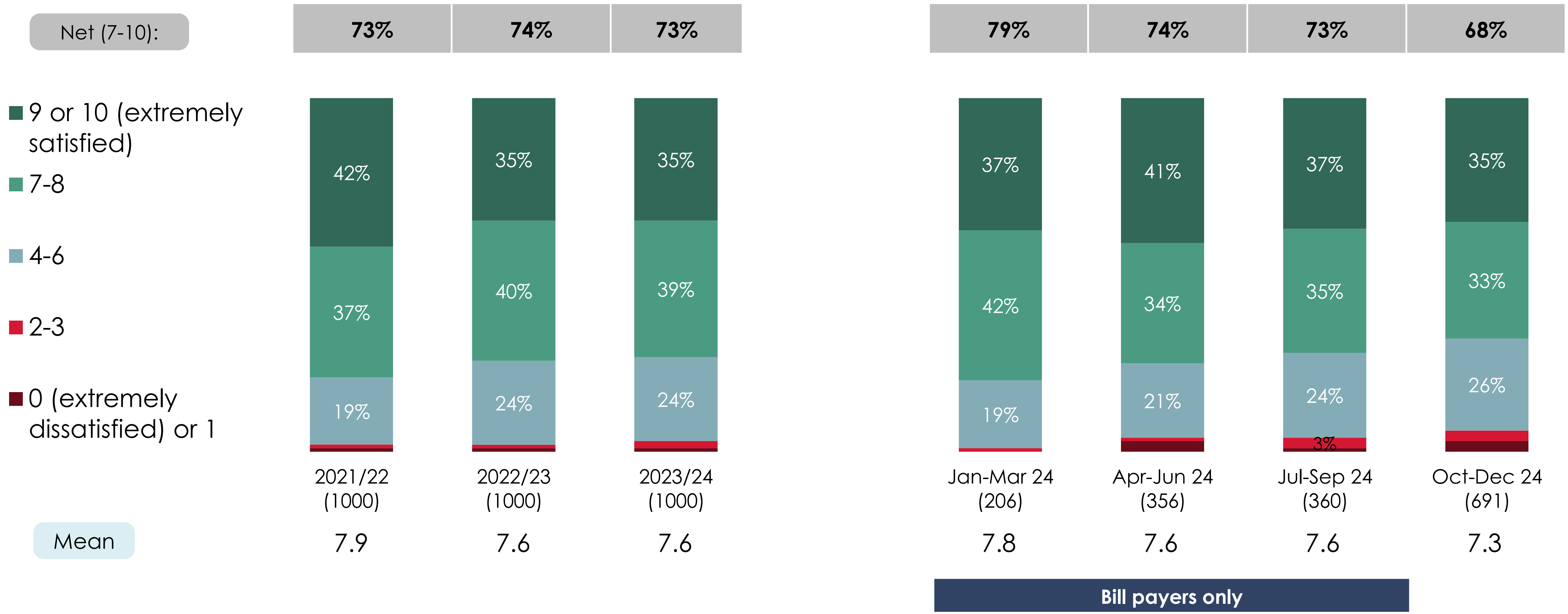
Satisfaction with Wessex Water has dropped, and is now significantly lower than Q1 24/25.

Satisfaction is lower amongst Bristol and Bournemouth residents and those who feel the water quality in their area is poor. There is no significant difference between segments.

Q11. Taking everything into account, how satisfied are you with Wessex Water? *Base: All respondents*

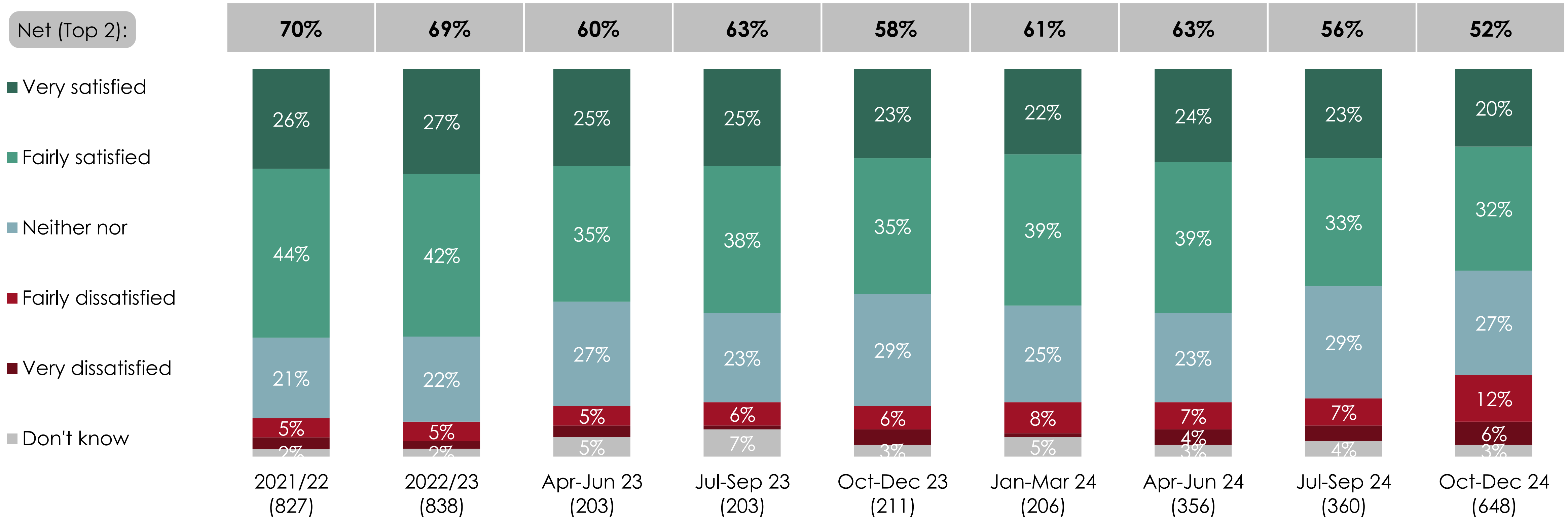


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Satisfaction with value for money continues to decline, and there is an increase in the proportion of those dissatisfied since the previous Quarter.

‘Carefree Consumers’ are more likely to feel dissatisfied (vs the total).

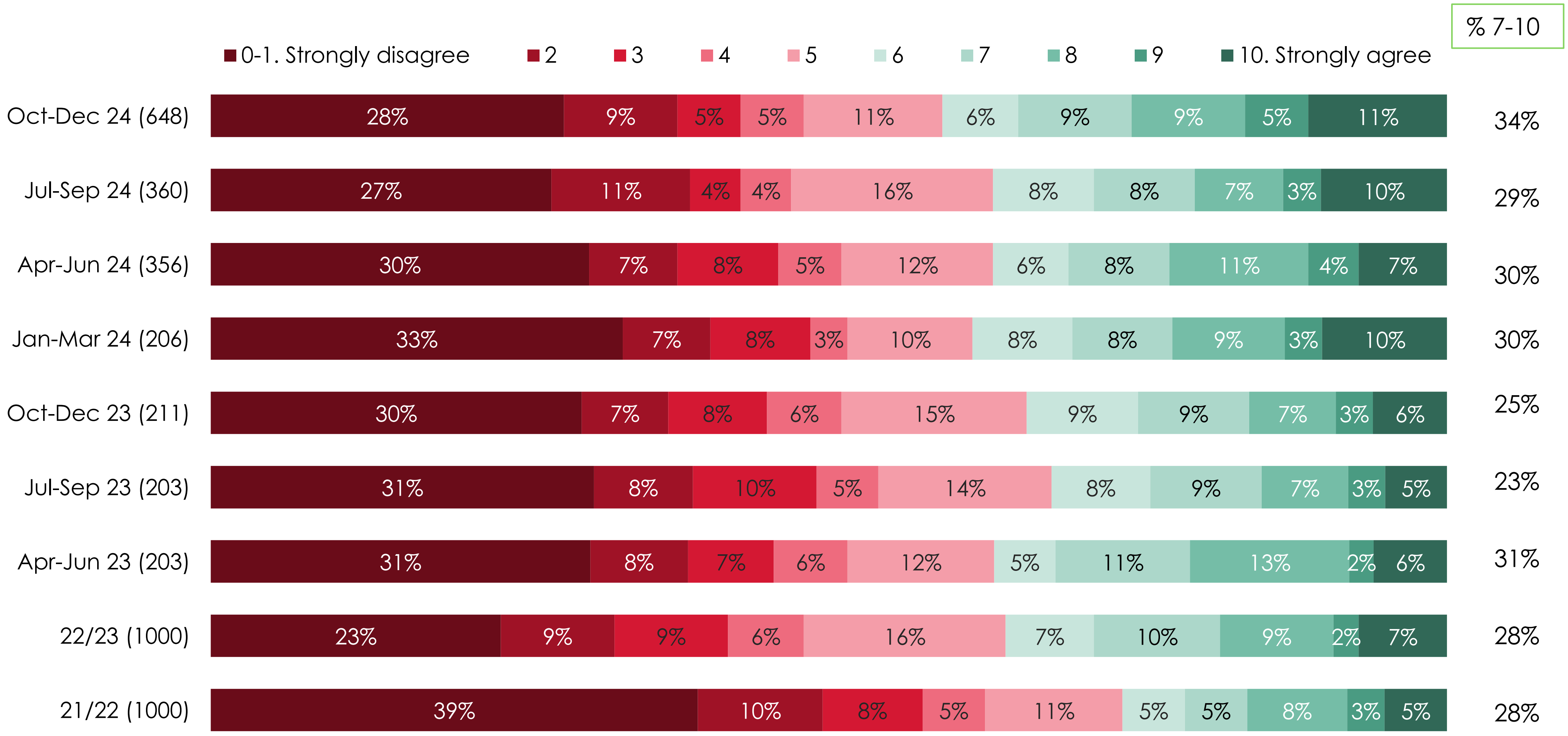
Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? *Base: All bill payers*



Anxiety about being able to afford the bill is slightly elevated (perhaps a reflection of the news about bill increases) – however, it is not significantly higher than the earlier months of 2024.

‘Carefree Consumers’ are more likely to feel anxious about being able to afford their water bill.

Q15. How strongly do you agree or disagree…? - I worry about being able to afford my water bill *Base: All bill payers*

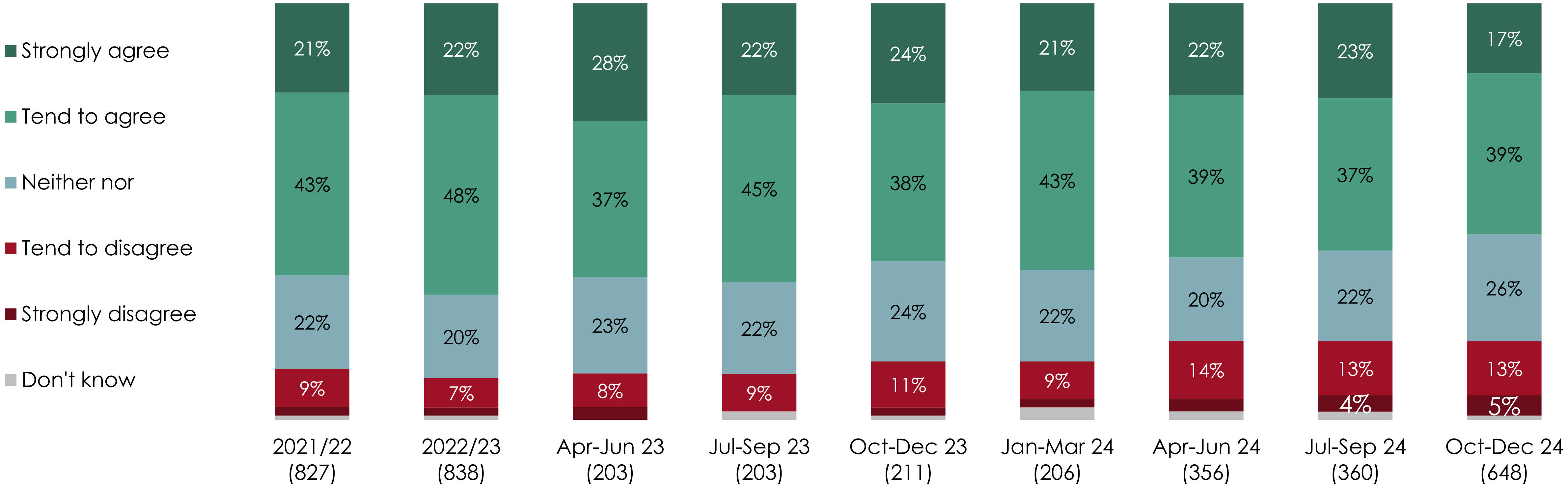


The proportion who agree that the water/sewerage charges are affordable continues to decline. However, the proportion who explicitly find the charges unaffordable remains stable.

No significant difference in terms of those who agree, but 'Carefree Consumers' are more likely to disagree that the bills are affordable than average.

Q17. How much do you agree/disagree: "The total water and sewerage charges that you pay are affordable to you"? *Base: All bill payers*

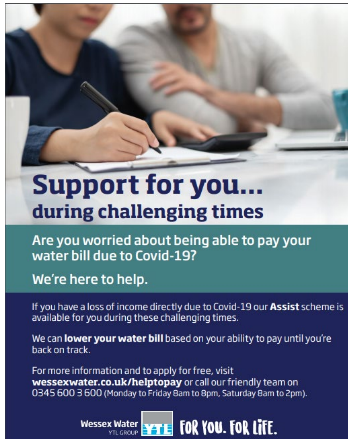
% Agree	**64%**	**70%**	**65%**	**67%**	**62%**	**64%**	**61%**	**60%**	**56%**
% Disagree	**11%**	**9%**	**11%**	**9%**	**13%**	**11%**	**17%**	**17%**	**18%**

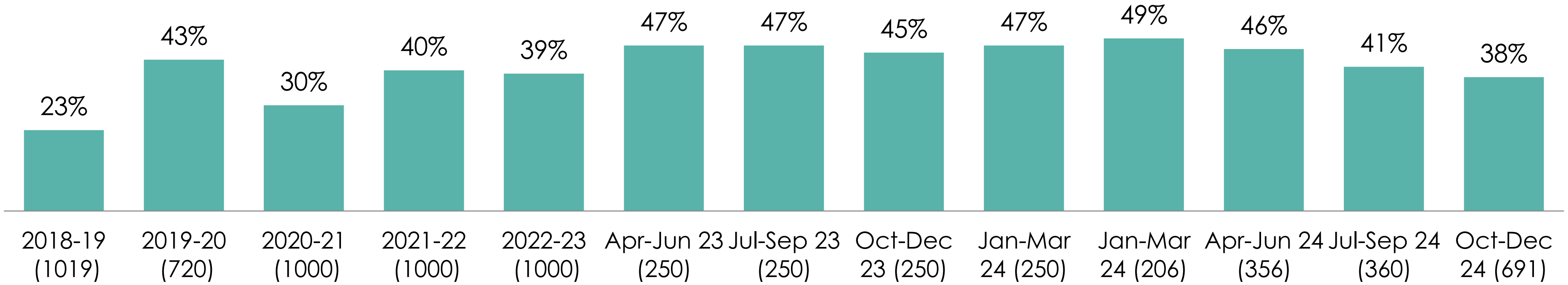


Awareness of both PSR and financial assistance continues to decline.

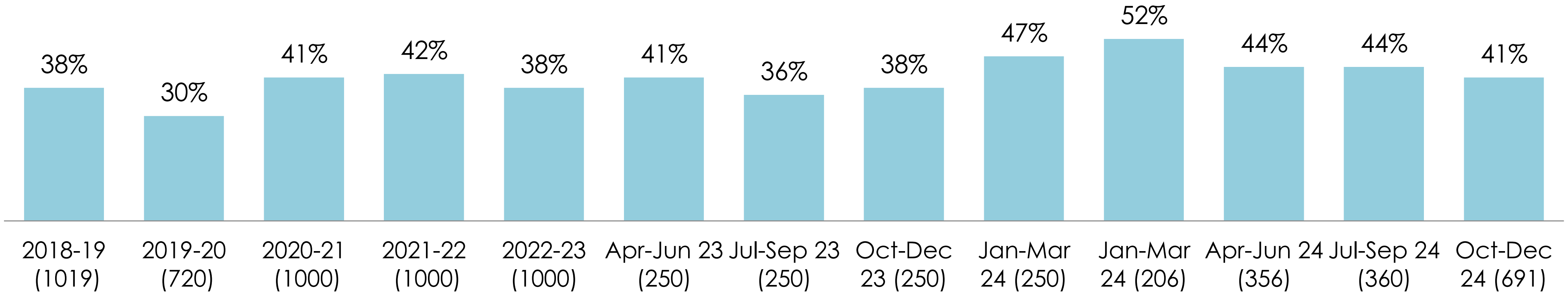
'Responsible Environmentalists' and 'Frugal Traditionalists' are more likely than other segments to be aware of these schemes.

Q20r1: Are you aware of Wessex Water doing any of the following? - **Assisting customers who struggle to afford their water bill** *Base: All respondents*





Q20r2: Are you aware of Wessex Water doing any of the following? - **Providing priority services for customers who need them, such as braille or extra support during a supply interruption** *Base: All respondents*



Bill payers only

Wessex Water YTL GROUP

Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

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Indicators of trust

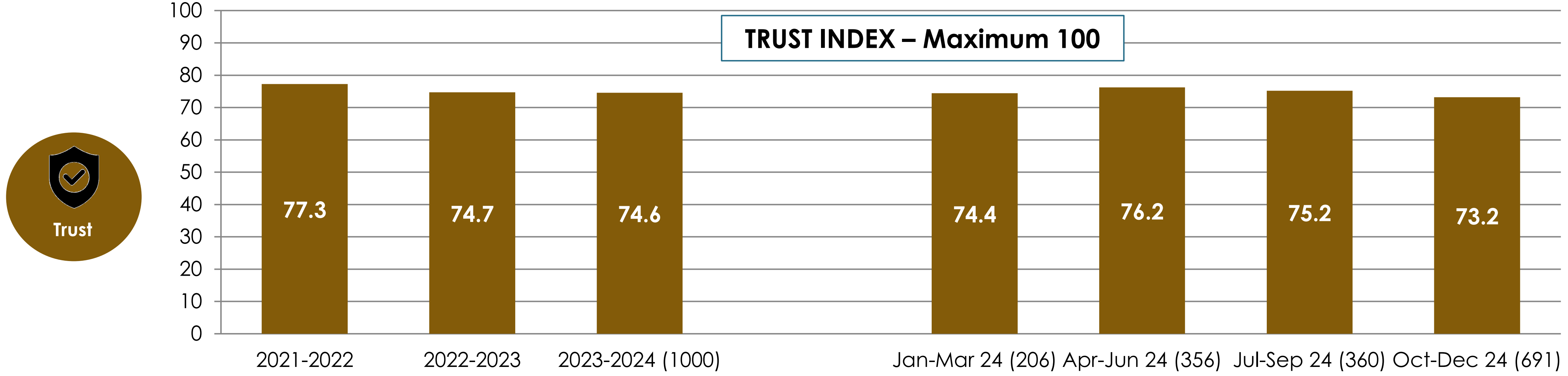
Trust

The current tracking study incorporates several image and performance measures that are known to drive trust, based on components of trust from ICS and Edelman models. The new 'Trust Index' is made up of **6 dimensions**

Trust dimensions	Tracker measures included
Customer ethos	• Care about you and your community • Making it easy for you to deal with them
Competence and capability	• Provide exceptional service • Fix any problems quickly
Reliability and dependability	• Reliability of their services • Easy to contact
Transparency	• Open and transparent company • Providing clear and easy to understand information
Ethics	• A responsible and ethical company that does the right thing • Care about the environment
Brand validation	• Well regarded in your community

The Trust Index has decreased in the latest quarter, with all components showing a decline, except for customer ethos and ethics (relating to caring about the community and environment).

'Convenience Cost-Savers' on average rate customer ethos lower than other groups, while 'Responsible Environmentalists' on average rate ethics lower than other groups.



Components – Mean scores

	2021-2022	2022-2023	2023-2024 (1000)	Jan-Mar 24 (206)	Apr-Jun 24 (356)	Jul-Sep 24 (360)	Oct-Dec 24 (691)
Reliability and dependability	8.20	8.05	8.18	8.20	8.30	8.33	8.1
Competence and capability	7.68	7.39	7.23	7.21	7.44	7.56	7.2
Customer ethos	7.64	7.40	7.34	7.36	7.63	7.41	7.3
Transparency	7.78	7.62	7.73	7.73	7.73	7.79	7.5
Ethics	7.44	7.16	6.93	6.76	7.08	6.93	6.9
Brand validation	7.42	6.98	6.97	6.93	7.06	7.13	6.6

Bill payers only

Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Knowledge and Sentiment

Knowledge

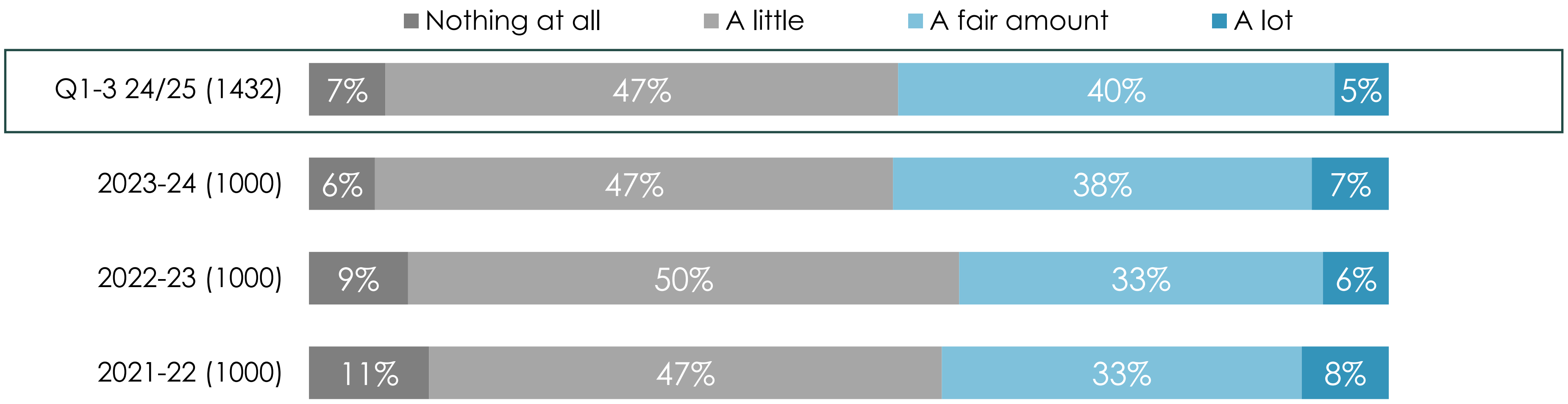
The proportion of customers who feel knowledgeable about Wessex Water remains stable.

Sentiment

The proportion of customers who feel positive about Wessex Water holds steady.

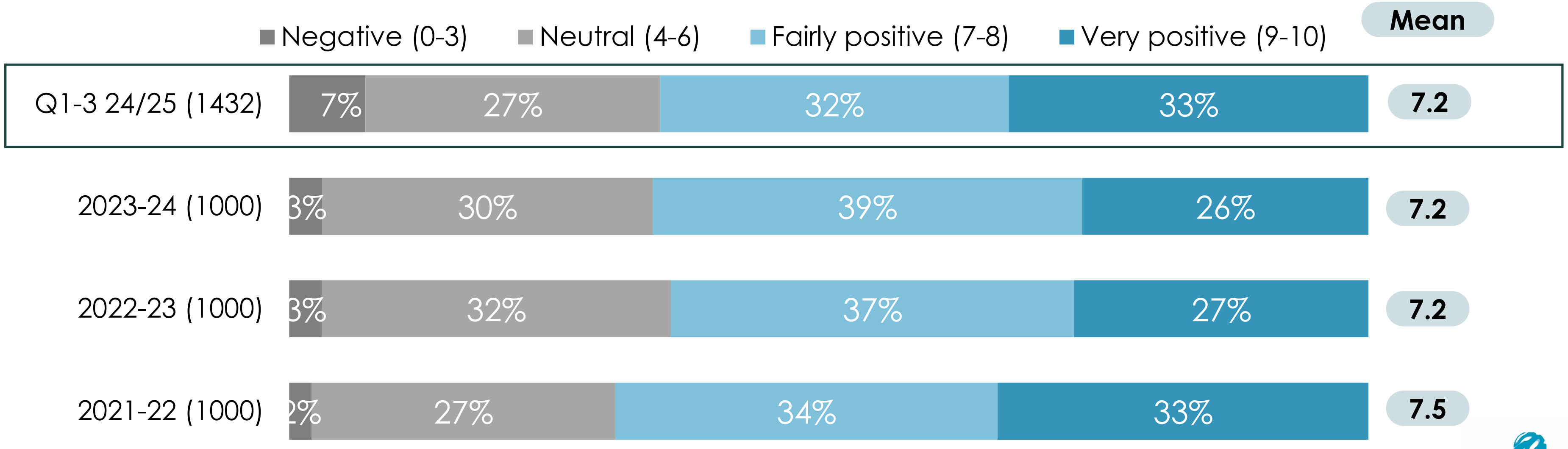
Q6. How much do you feel you know about Wessex Water and what they do?

Base: All respondents



Q4. Now thinking about Wessex Water. Please tell us how do you feel about them overall?

Base: All respondents

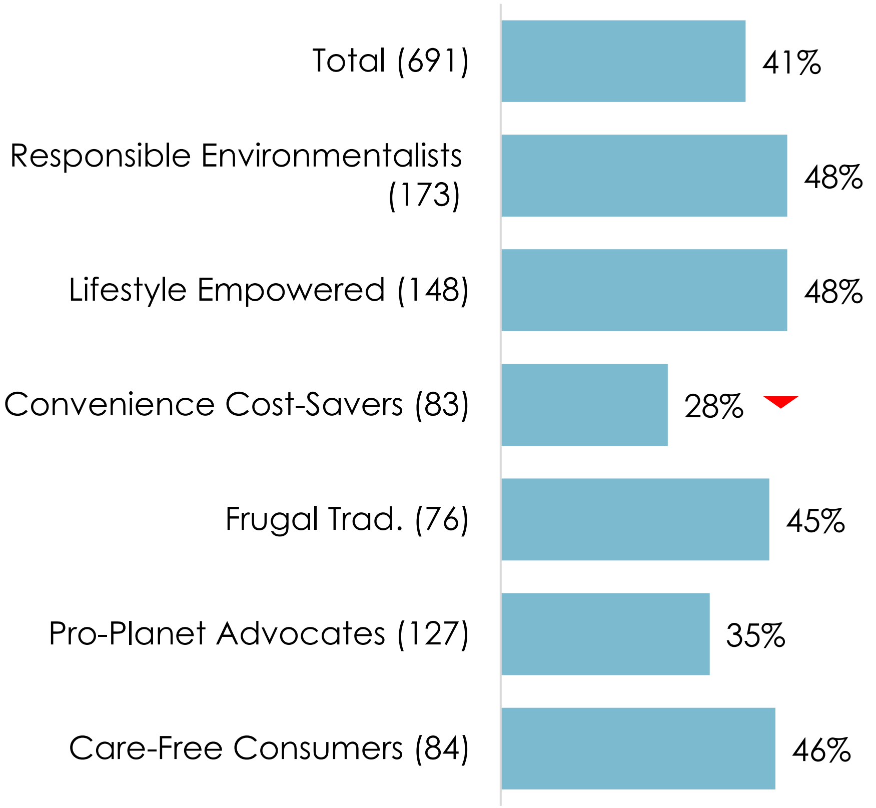


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

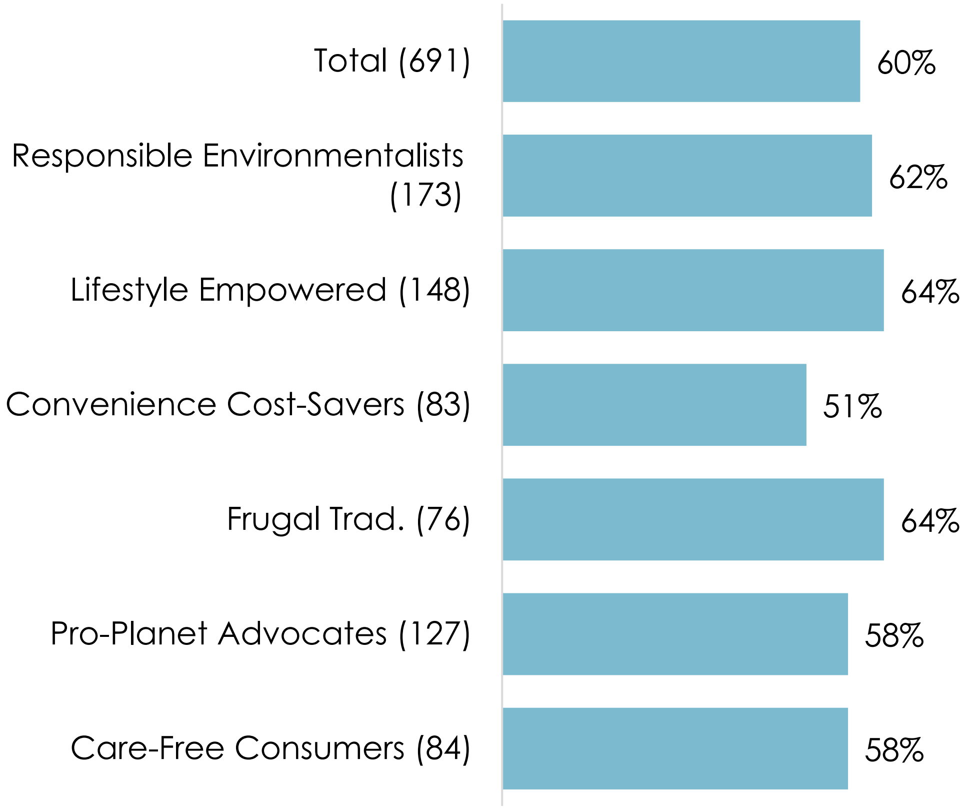
The proportion who feel knowledgeable about Wessex Water and the proportion who feel positive towards the company remain relatively stable across most segments.

'Convenience Cost-Savers' are less likely to feel knowledgeable about Wessex Water. They are also less likely to feel positive toward the brand (but not significantly so).

Q6. How much do you feel you know about Wessex Water and what they do?
(% A fair amount/a lot)



Q4. Now thinking about Wessex Water. Please tell how do you feel about them overall?
(% Fairly/very positive)



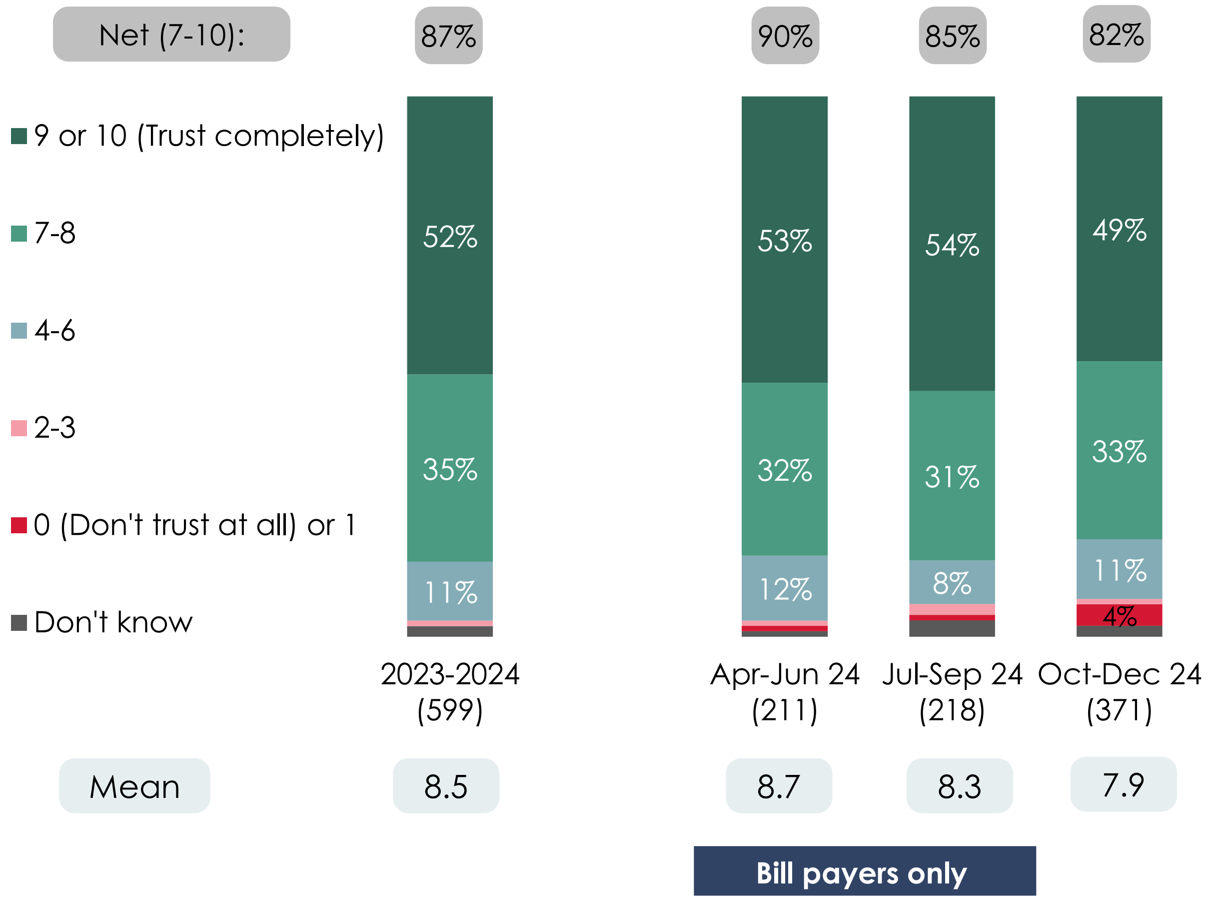
Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Sig higher than total
Sig lower than total

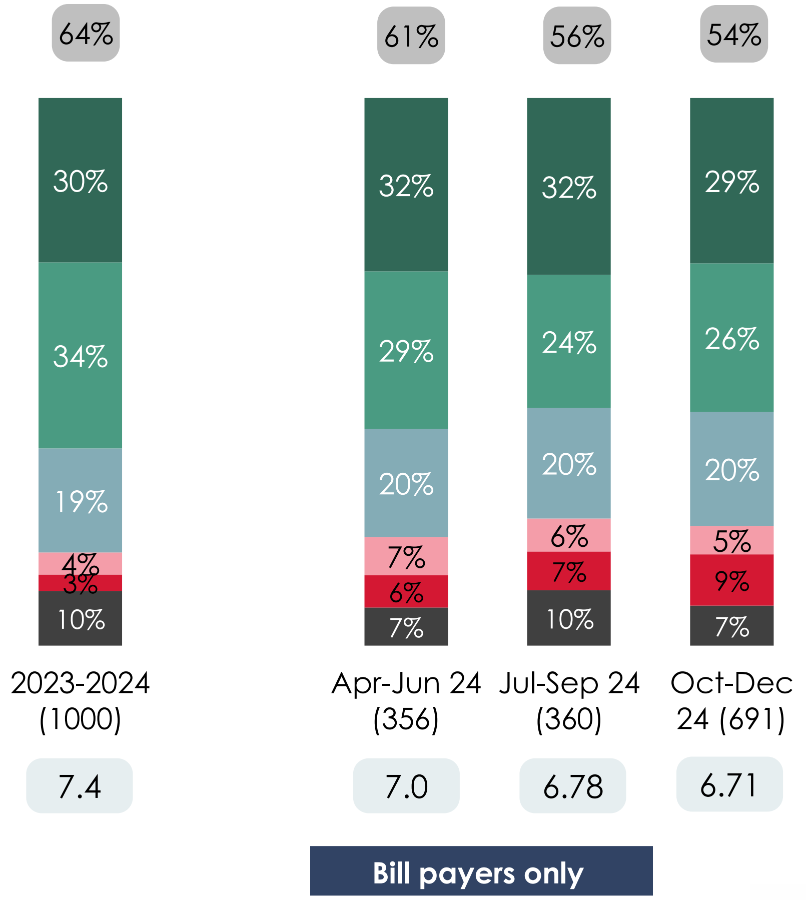
Trust in Wessex Water to deliver a reliable supply of quality tap water experienced a slight decline compared to the previous Quarter, though not significantly. Trust related to wastewater management remains stable.

'Care-Free Consumers' are less likely to trust Wessex Water's ability to deliver quality tap water. 'Frugal Traditionalist's are more likely to trust Wessex Water to take away wastewater and sewage.

QT1. How much do you trust Wessex Water to provide a reliable supply of good quality tap water?
Base: All respondents in supply area



QT2. How much do you trust Wessex Water to take away wastewater and sewage and deal with it responsibly?
Base: All respondents



Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Brand health and image

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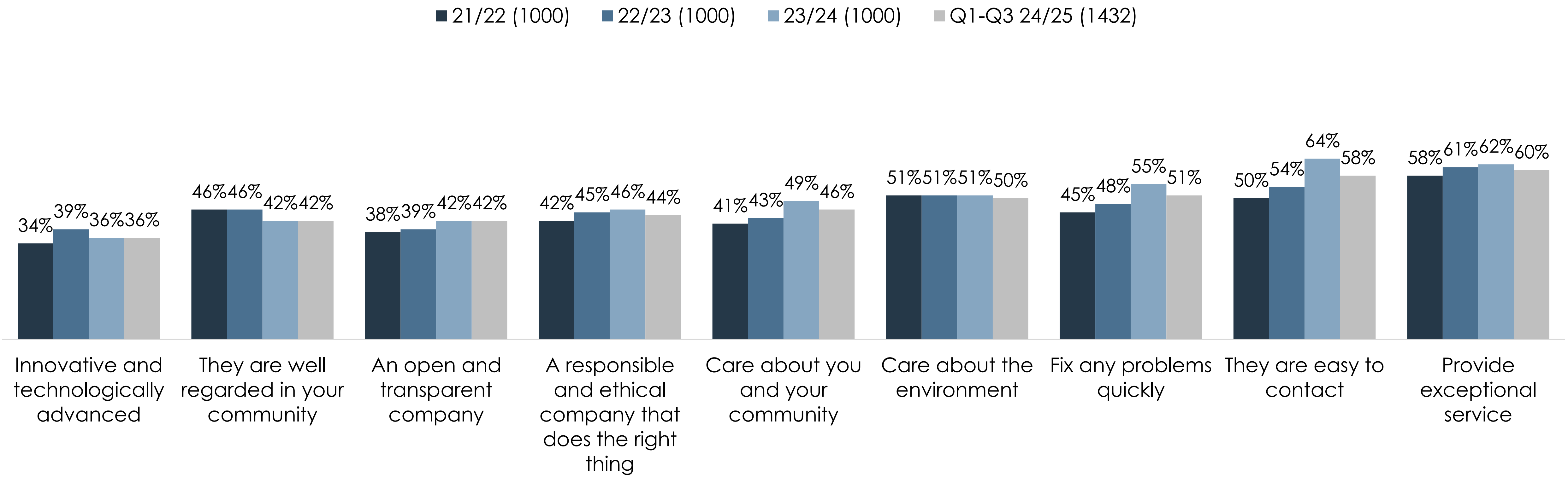
Brand image is relatively consistent with previous years, though there is a drop in the proportion who feel that Wessex Water is easy to contact compared to the peak last year.

'Convenience Cost-Savers' are less likely to feel knowledgeable about Wessex Water versus the total. They are also less likely to feel positive toward the brand (but not significantly so).

Q8. Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? % rating 7-10 (10 = 'strongly agree' 0 = 'strongly disagree'). *Base: All respondents*

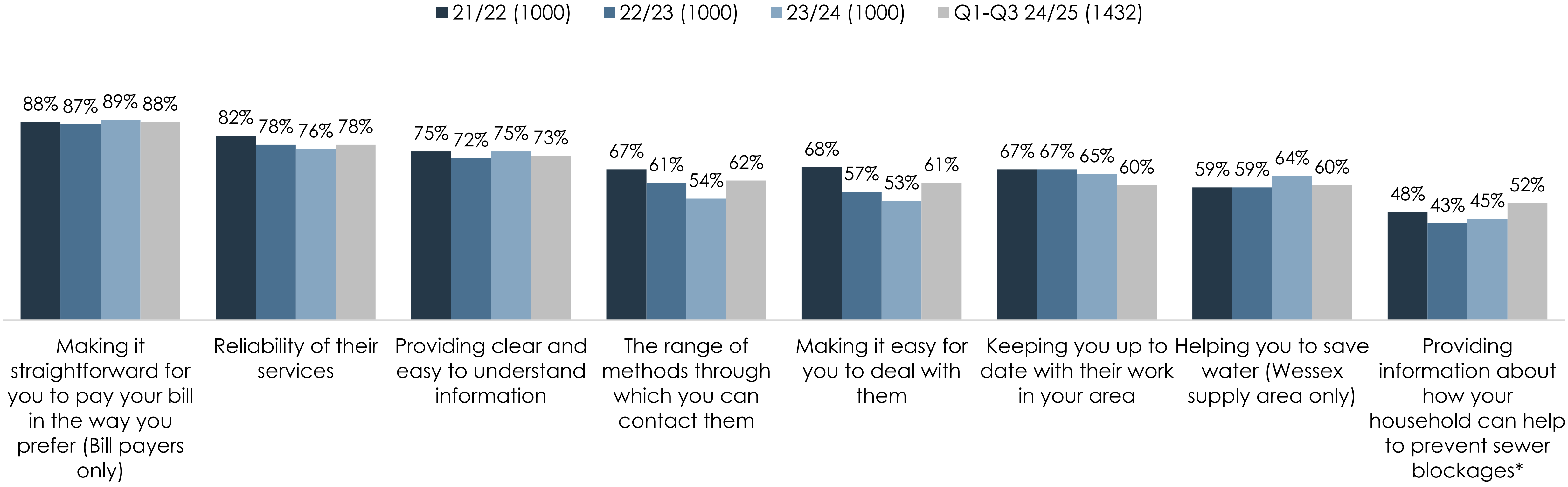


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Most customers continue to rate the straightforwardness of the bill paying process and the reliability of Wessex Water's services highly.

Compared to last year, more customers are satisfied with how they can reach Wessex Water and with the information provided about how to prevent sewer blockages.

Q13. How would you rate Wessex Water's performance in the following areas? (% rating 7-10 (10 = 'excellent' 0 = 'very poor'). *Base: All respondents*

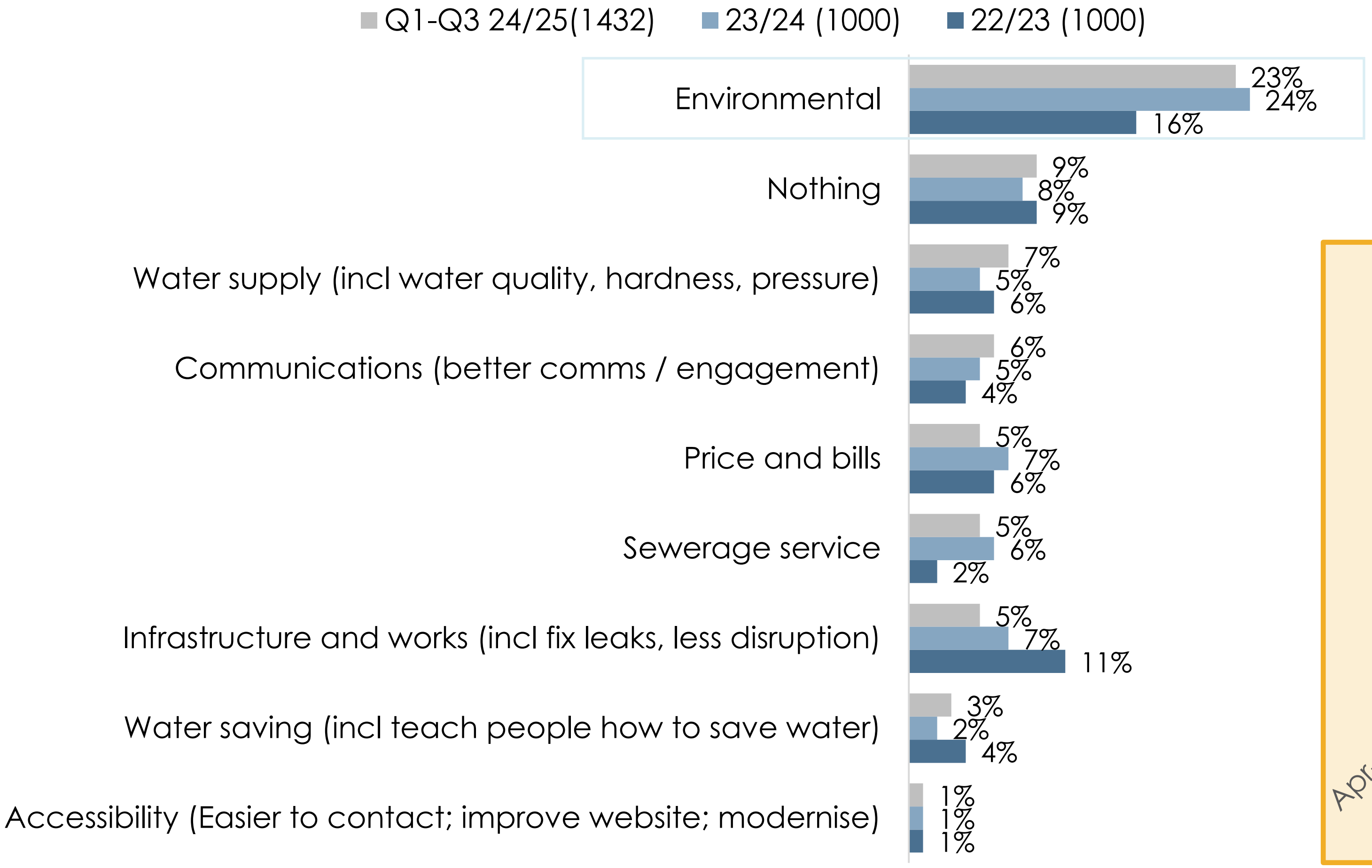


Question wording changed in Q3 2023-24 from "Helping you prevent sewage blockages in your household"
Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

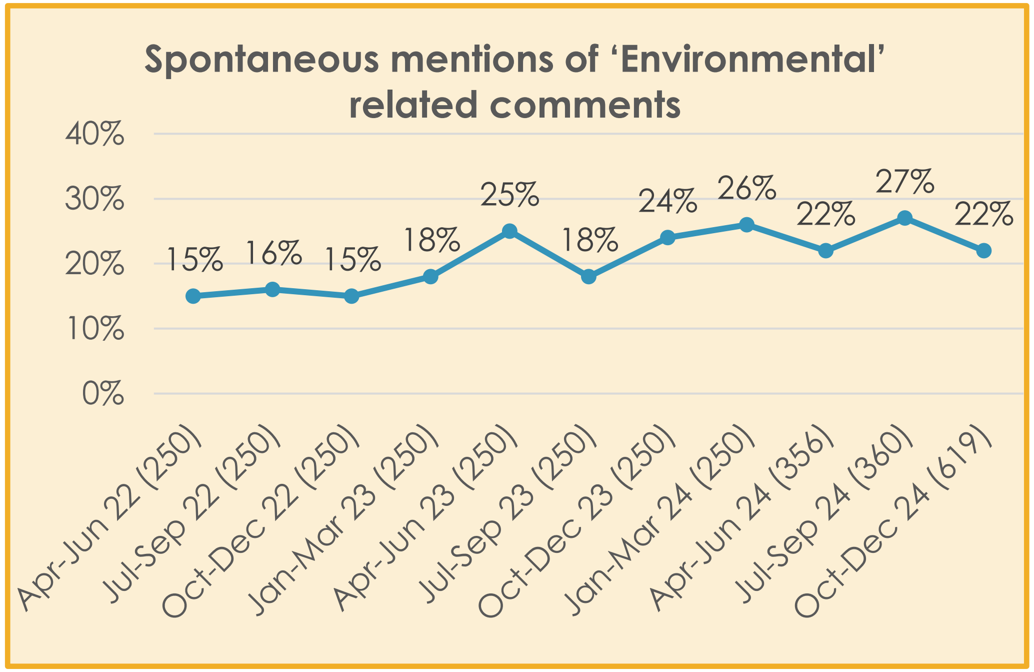
Environment issues remain top of mind when thinking about what Wessex Water should focus its attention on.

Specifically, customers are thinking about reducing or mitigating sewage in rivers and seas.

Q14: Thinking of all the things that Wessex Water do and could do in future, what do you think it could do more of, or do better at? *Base: All respondents*



Should be no sewage in rivers/sea	14%
Be more environmentally friendly	4%
Should be less sewage in rivers/sea	3%

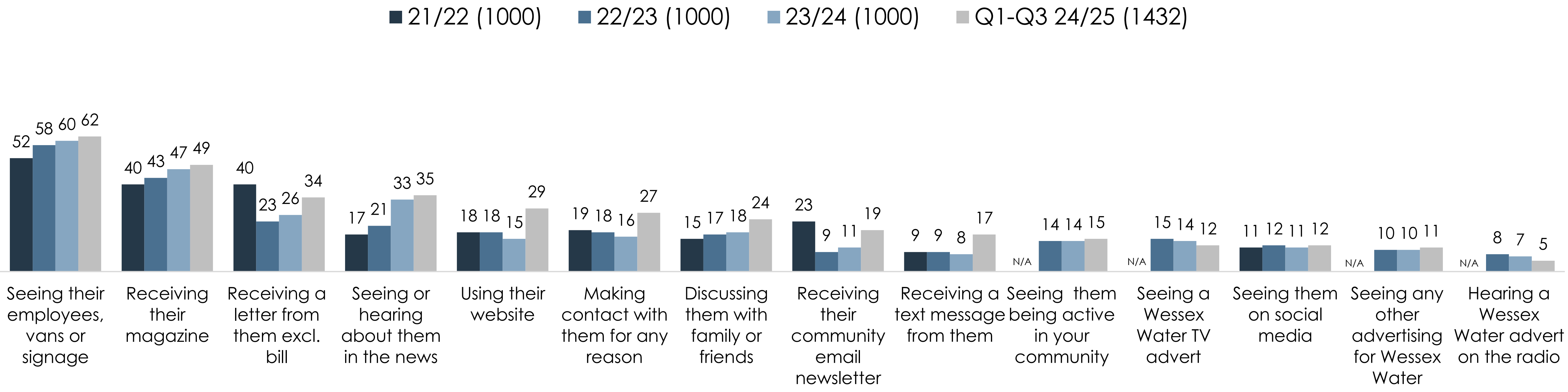


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

A higher proportion of customers recall various touchpoints, and on average customers recall more touchpoints than in previous years.

Recall of contact points (website, general contact, receiving SMS') has increased, this fluctuation by partially be due to the change in methodology in 24/25.

Q23: Thinking about Wessex Water, in the last six months do you recall…? *Base: All respondents (%)*



Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Water use behaviours

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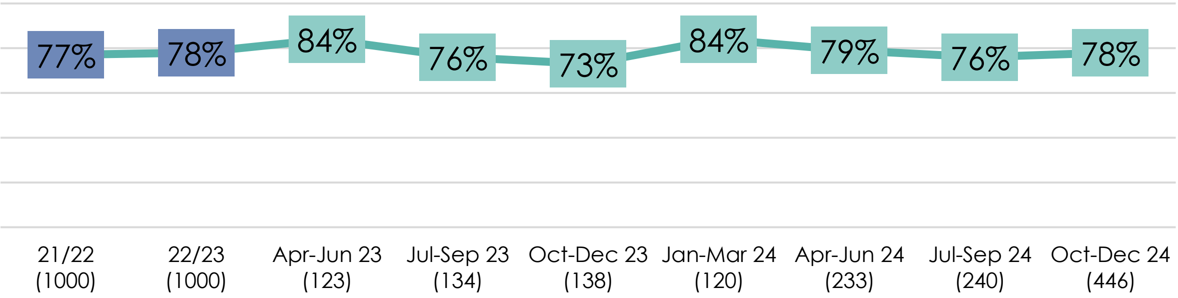
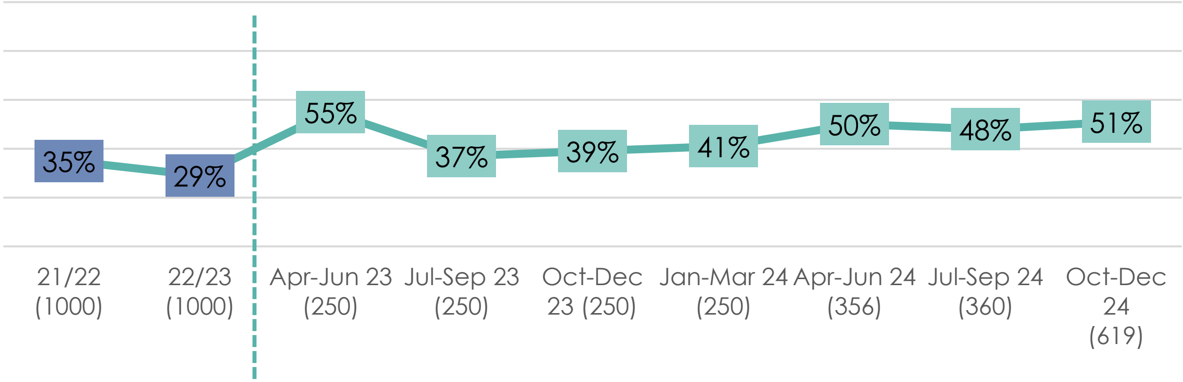
There is little change in customers’ attitudes to water use and metering. However, compared to the same quarter in 23/24, however, there are notable increases for all metrics.

‘Responsible Environmentalists’ are more likely than average to feel they manage to keep the water bill down. ‘Lifestyle Empowered’ are more likely than average to be interested in the benefits of smart meters.

QF1. And how much would you agree or disagree with …? % rating 7-10 (10 = ‘strongly agree’). *Base: All respondents*

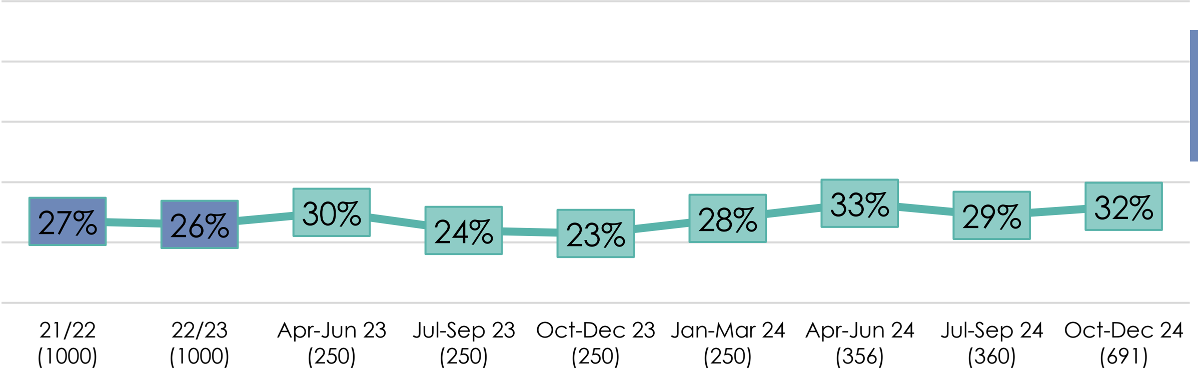


I manage my water use to keep the water bill down*



I’d be interested in having a smart meter

I’d be interested in having more frequent updates on how much water I’m using and how much it is costing**



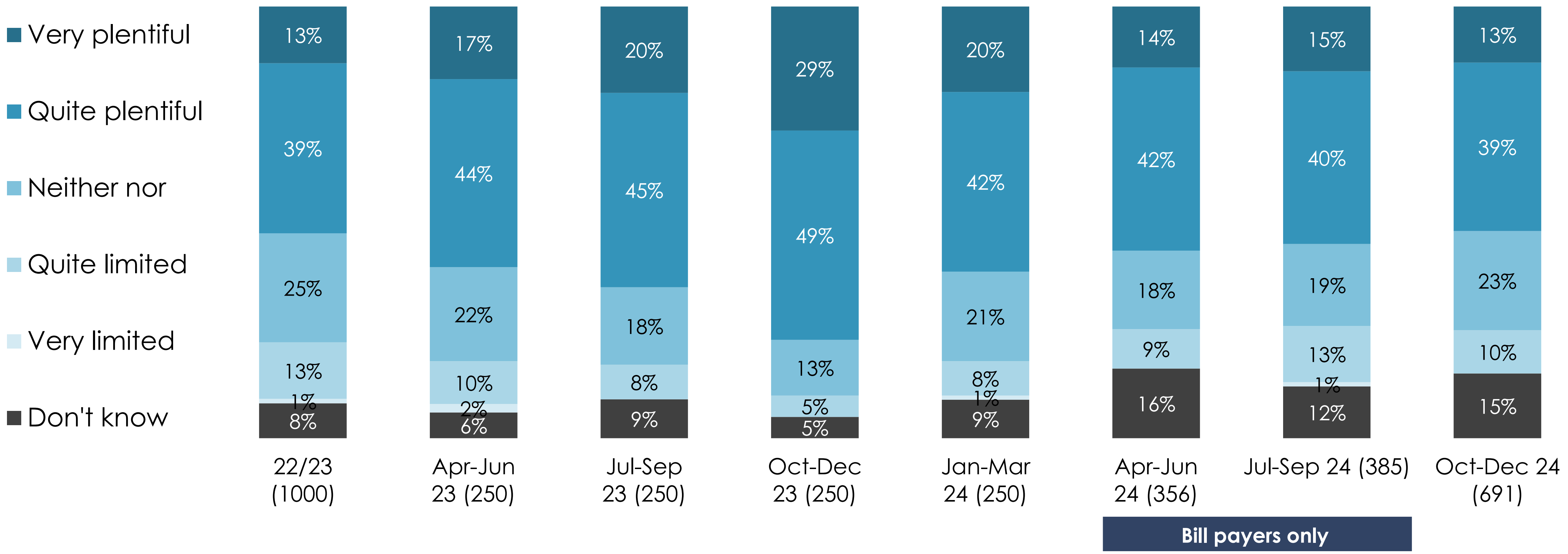
I’m not sure how I can reduce my household’s water use

*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from “I’d be interested in having a smart water meter”
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

Impressions of water resources in the region have remained relatively stable over the year, unlike last year, which saw significant variations across 23/24.

'Convenience Cost-Savers' are twice as likely to be uncertain about levels of water resources in the region (29%)

QF2b. The water supplied to homes and businesses comes from rainwater that ends up in rivers, reservoirs and natural underground stores. How plentiful or limited do you think these sources of water are in your region?
Base: All respondents

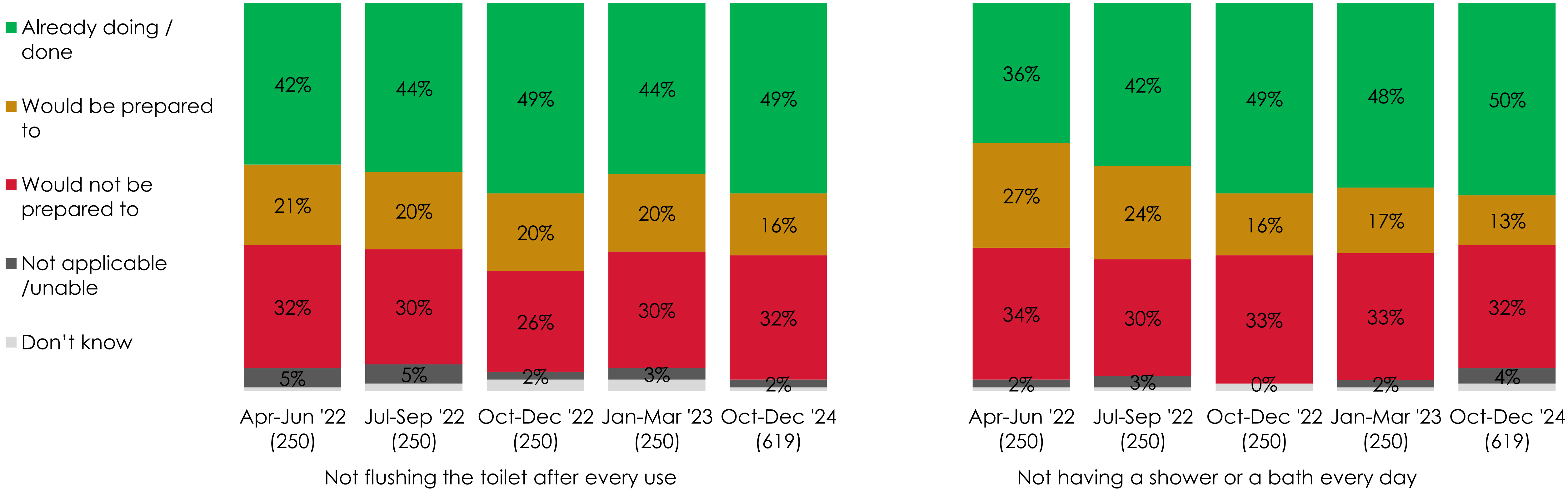


*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter"
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

Half of customers say they are already reducing their flushing and bathing frequency. However, the proportion resistant to these behaviours holds steady across time.

'Responsible Environmentalists' are more open to these behaviours and more likely to already be engaging in them. 'Frugal Traditionalists' and Pro-Planet Advocates are also more likely to be open to these habits (if not already doing so).

QF2c/d. Please tell us which of these you are already doing / you have already done, and which others, if any, you would be prepared to do, to reduce your use of water? *Base: All respondents*

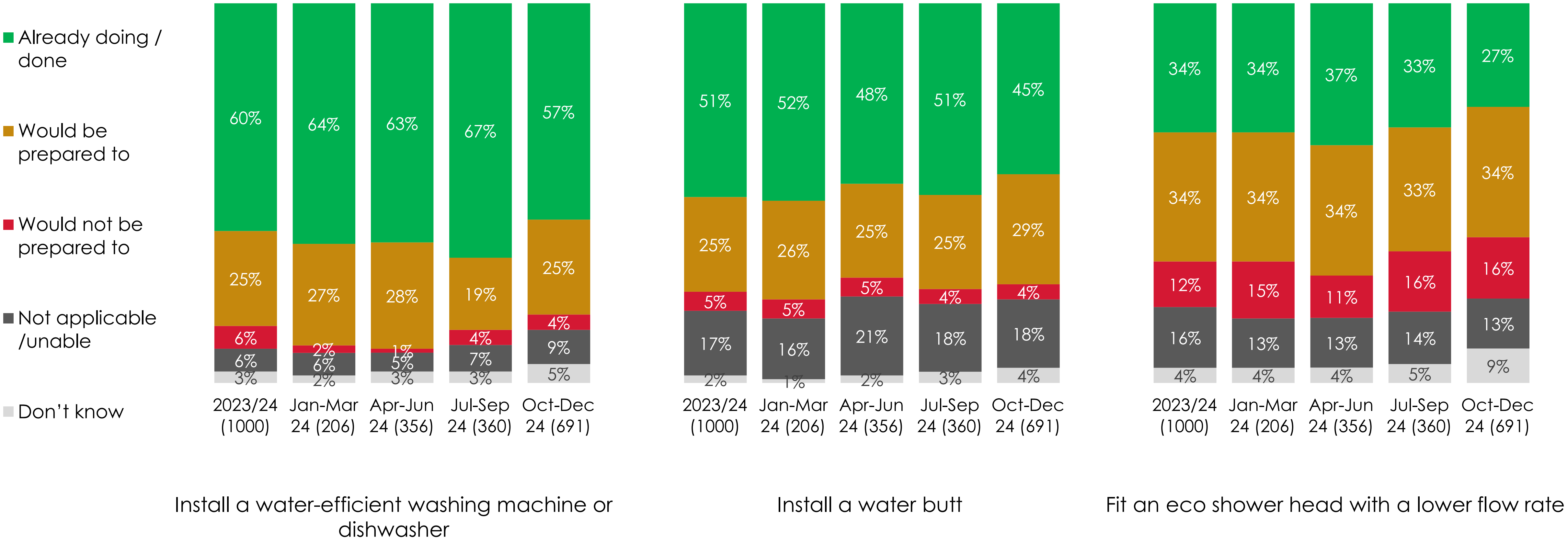


This measure was not tracked in FY 23/24, but revived as it is a Golden Question in the segmentation.

Openness to installing water-efficient appliances or water butts remains unchanged, but there is increased hesitation regarding eco-showers, with 1 in 10 now expressing uncertainty.

'Pro-Planet Advocates' are more likely to say they 'don't know' to installing appliances or showers – perhaps an opportunity to educate on the benefits of installing these water saving measures.

QF2c/d. Please tell us which of these you are already doing / have already done, and which others, if any, you would be prepared to do, to reduce your use of water? *Base: All respondent 2023/24, Bill payers Jan-Mar 2024, Apr-Jun 2024, Jul-Sep 2024, All respondents Oct-Dec 24*



New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

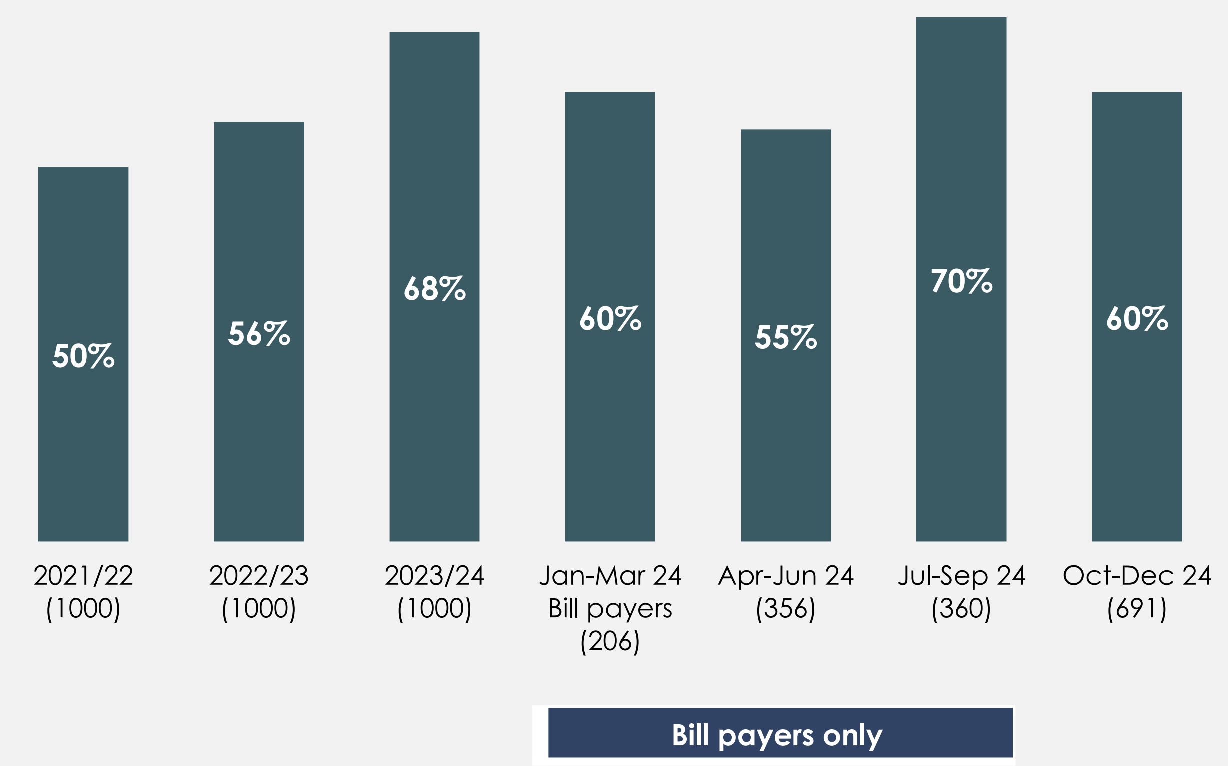
Storm overflows

BLUE MARBLE

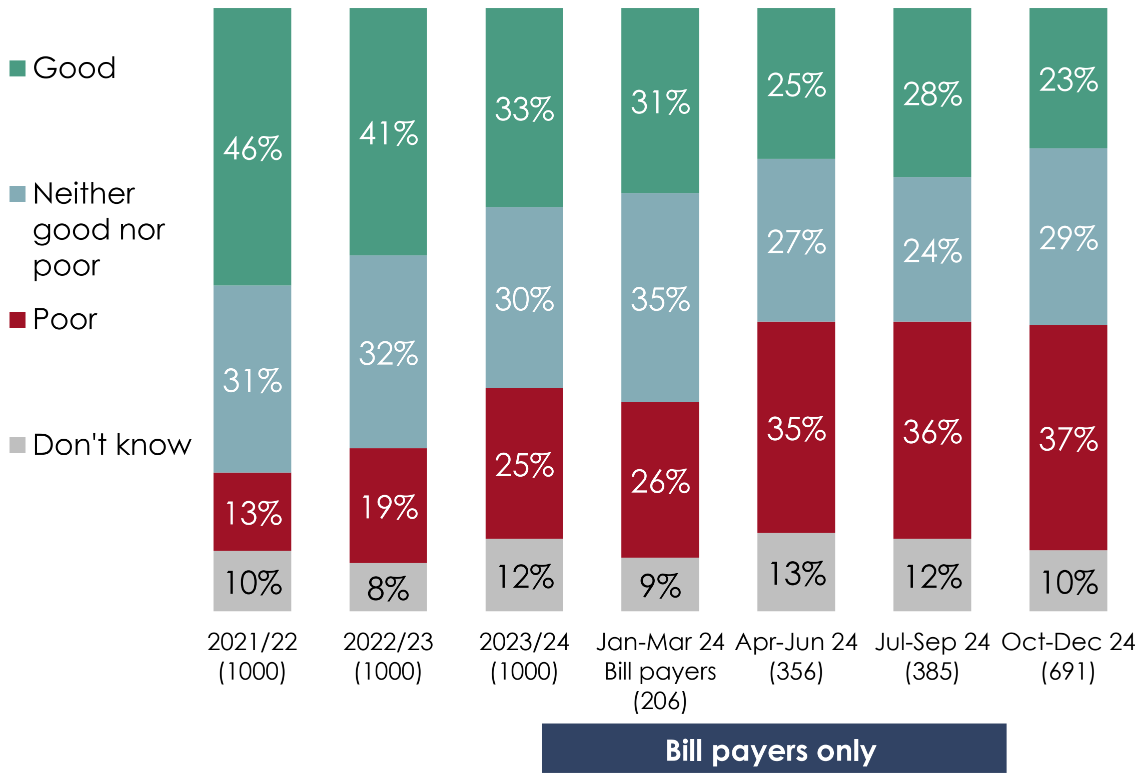
The proportion of customers who have heard about releases of CSOs has dropped from its peak in Q3, while there is a long term decline in those who perceive water quality in their area as good.

'Responsible Environmentalists' are significantly more likely than average to be aware of CSOs (while 'Convenience Cost-Savers' are less likely to be aware – though interestingly, they are much more likely to rate water in their area as poor).x

QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before? - % aware
Base: All respondents



QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality? *Base: All respondents*

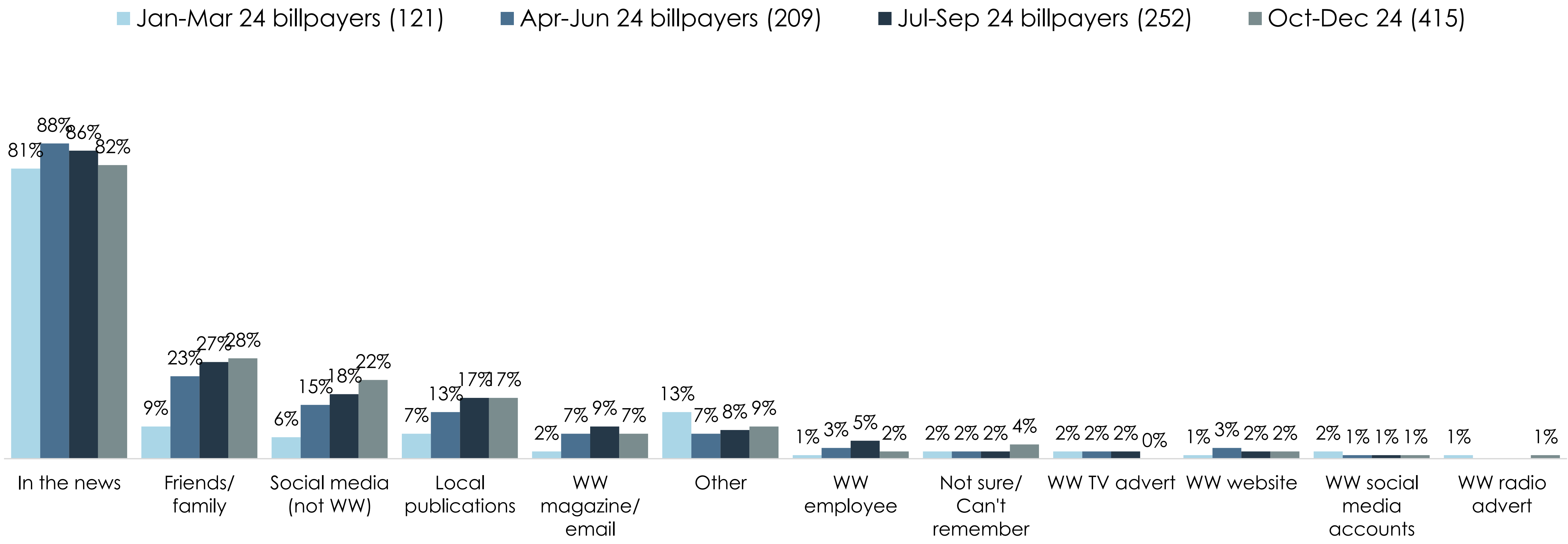


New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

There has been no change in the primary source of awareness about storm overflow releases compared to the previous Quarter, with most customers learning about this topic through news coverage.

No significant difference between customer segments.

QF1e. And where did you hear about this topic? *Base: Those aware of storm overflows*

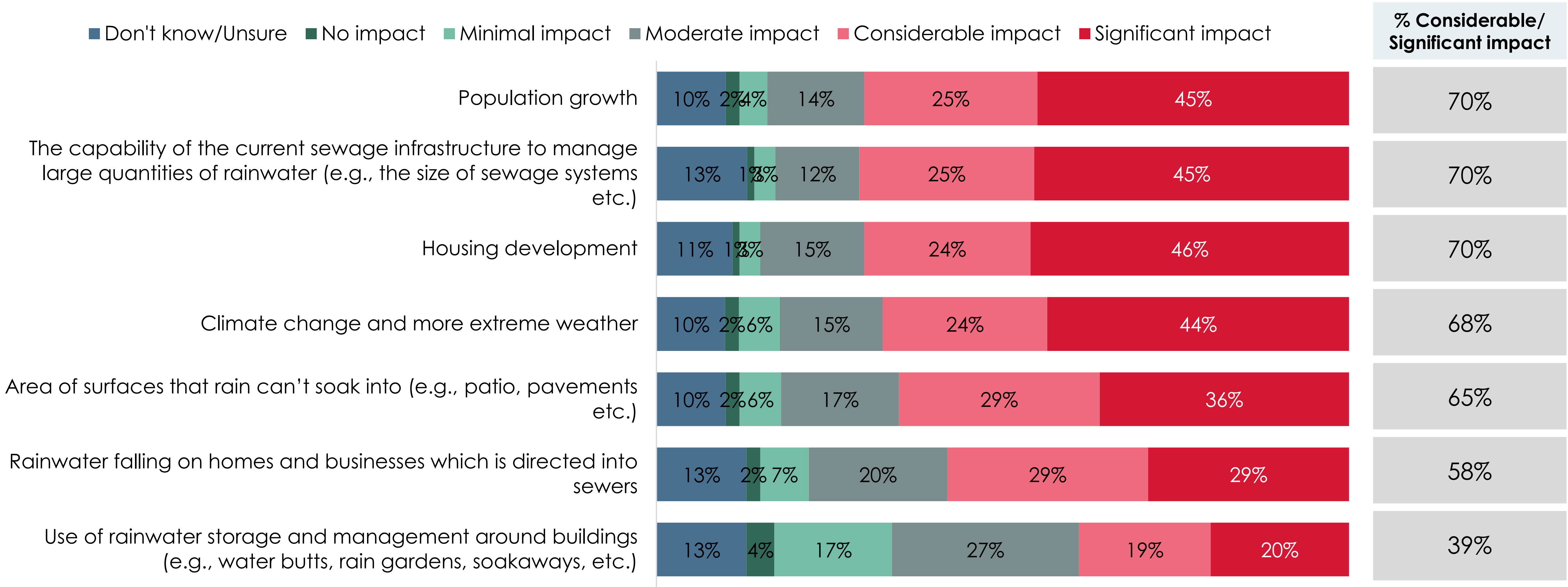


New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

Around 70% of customers believe that population growth, housing development, existing infrastructure and climate change are significant contributors to storm overflow usage.

Conversely, around one in five think that measures like water butts have little to no impact on the frequency of usage – particularly those in the Carefree Consumers segment.

QF1dNEW. What impact, if any, do you think the following factors have on how often storm overflows are used?
Base: All respondents

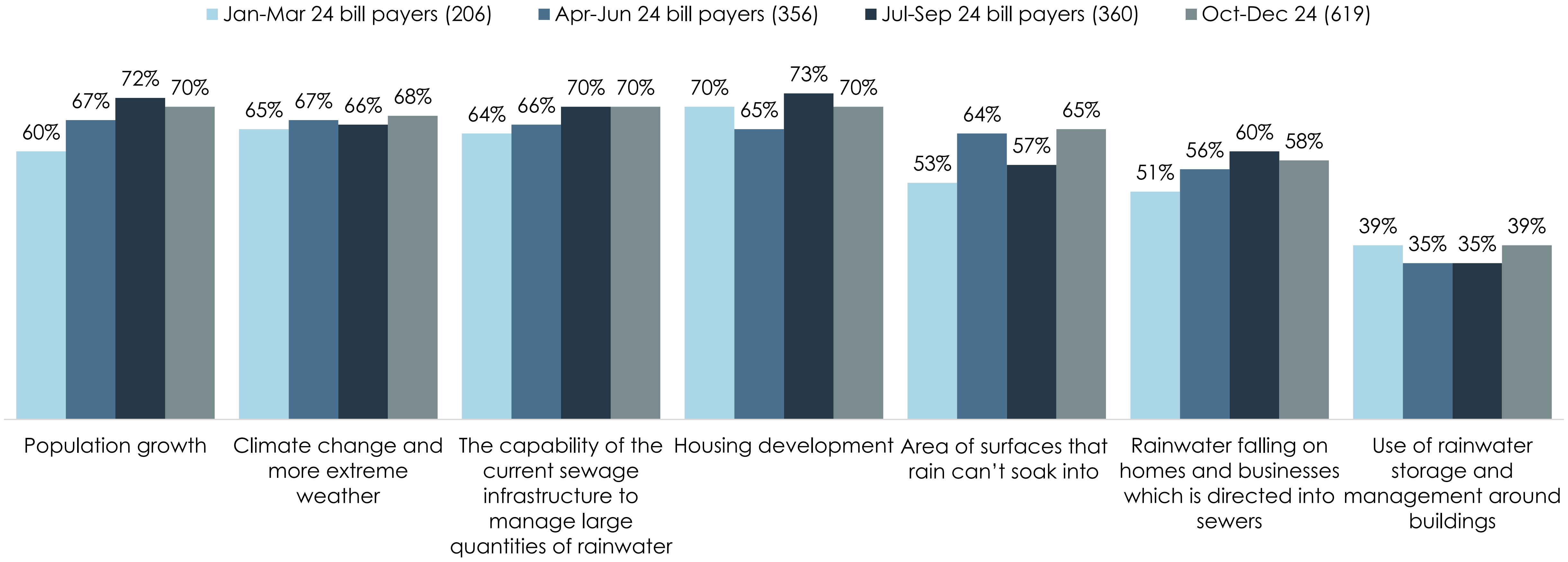


New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

There is growing understanding of how population growth, the limitations of current infrastructure, and the challenges posed by rainwater being directed into sewers impact storm overflow usage.

Satisfaction with value for money continues to decline, and there is an increase in dissatisfaction since the previous Quarter.

QF1dNEW. What impact, if any, do you think the following factors have on how often storm overflows are used? (Trended)

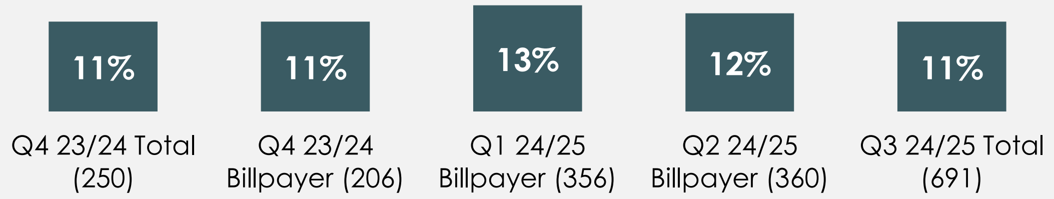


New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

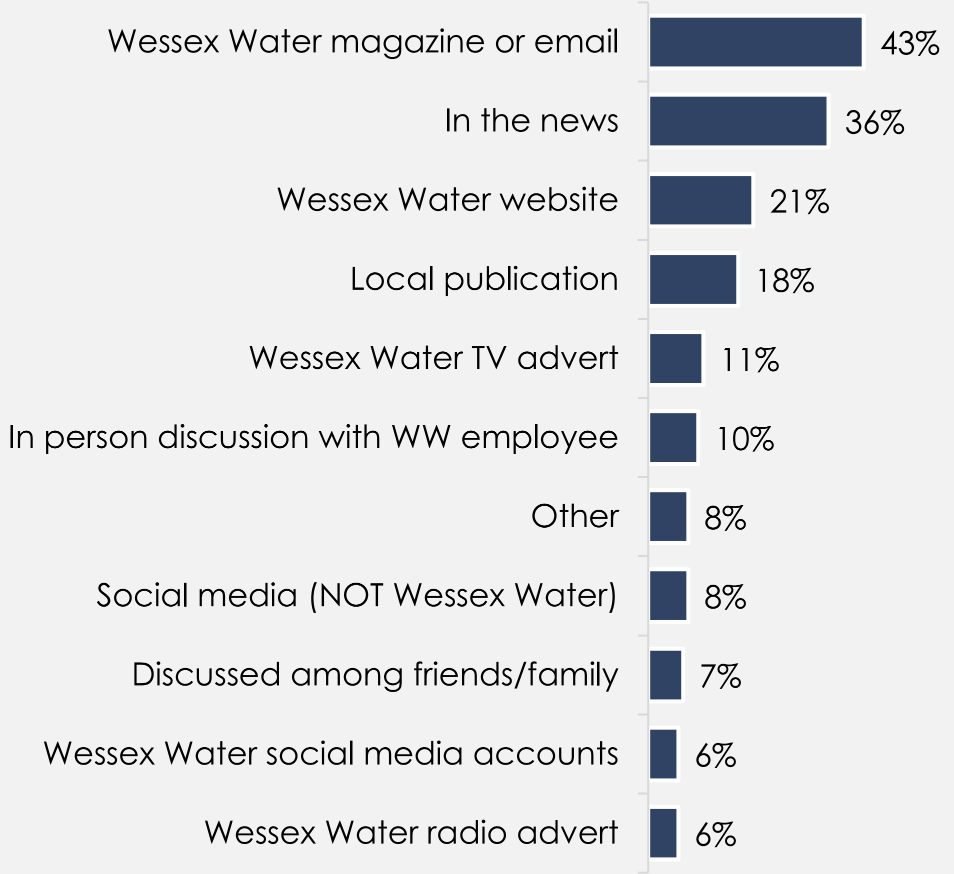
Awareness of Wessex Water's efforts in this area has remained consistent over recent Quarters.

Awareness of Wessex Water's endeavours is broadly similar across segments.

QF1g. Have you heard or seen any information about what Wessex Water is doing to reduce storm overflows into rivers or the sea?



QF1h And where did you hear about this topic?
Base: All aware of Wessex Water activity to reduce CSOs (77)



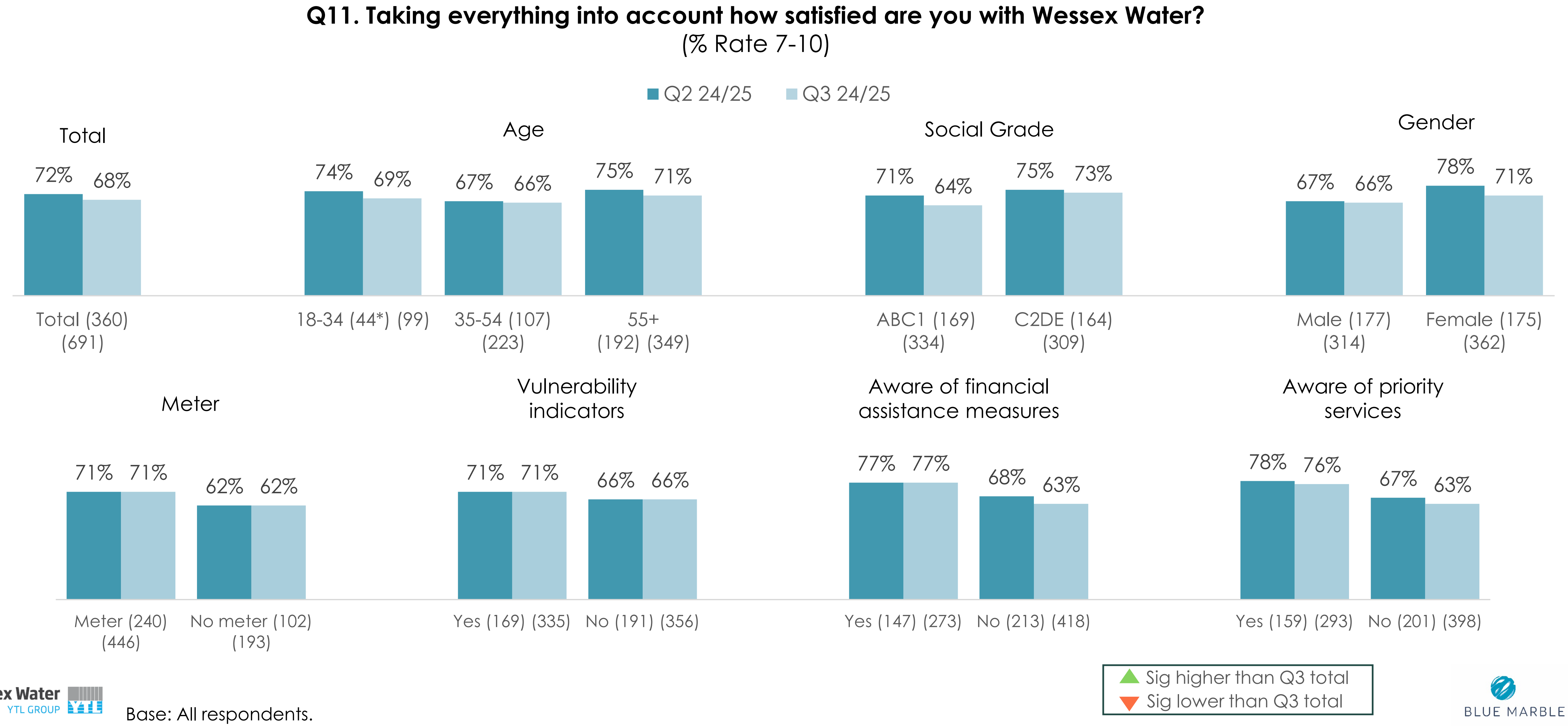
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers Methodology change in Q3 2024/25 – includes non bill payers)

Appendix

BLUE MARBLE

Overall satisfaction with Wessex Water - by key groups Q3 2024/2025

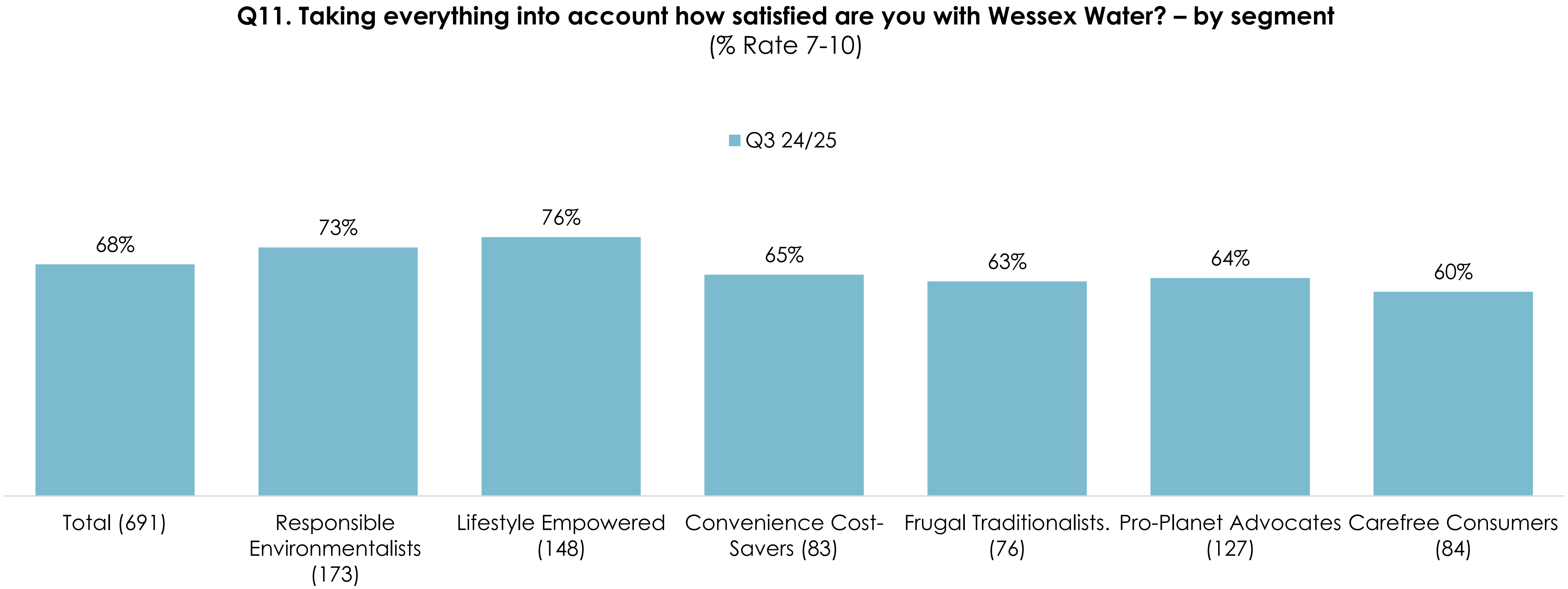
No significant differences between subgroups for overall satisfaction with Wessex Water in Q3 2024/2025.



Base: All respondents.

Overall satisfaction with Wessex Water - by segments Q3 2024/2025

No significant differences between segments for overall satisfaction with Wessex Water in Q3 2024/2025.



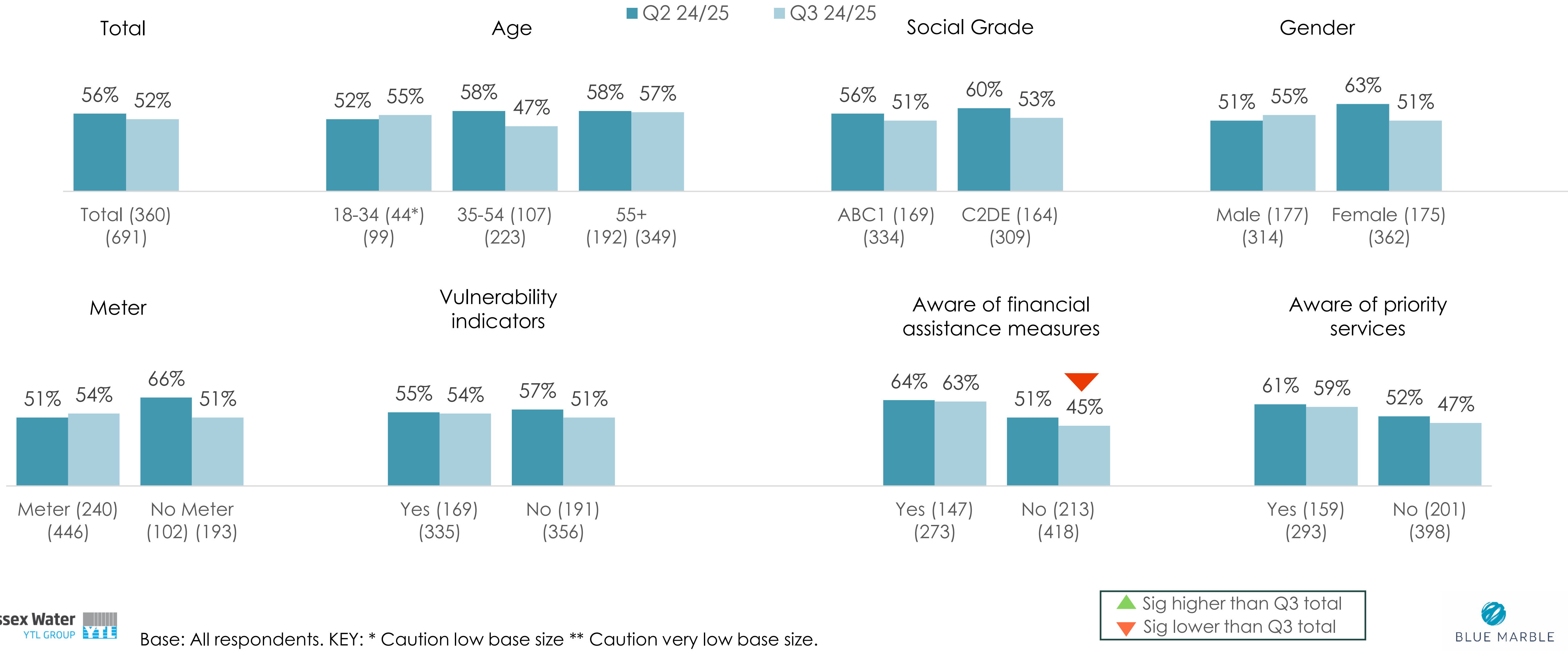
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Satisfaction with value for money - by key groups Q3 2024/2025

Satisfaction for value for money is significantly lower amongst those who are unaware of financial assistance measures.

Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? *(% Rate Very/fairly satisfied)*

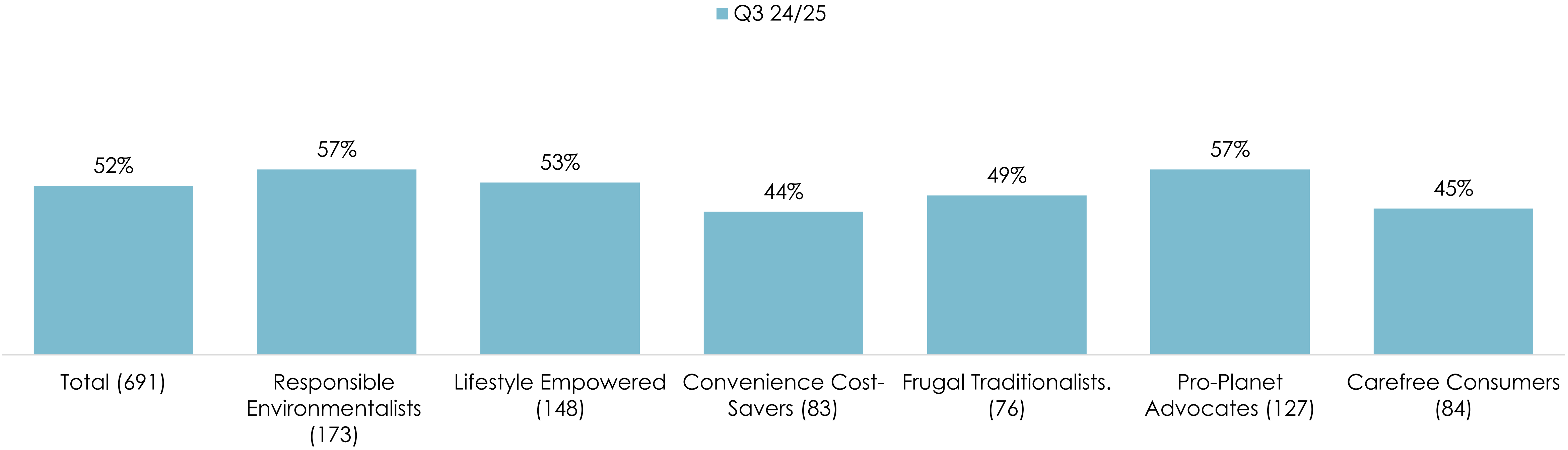


Base: All respondents. KEY: * Caution low base size ** Caution very low base size.

Satisfaction with value for money - by segments Q3 2024/2025

There are no significant differences for satisfaction for value for money scores by segment.

Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? *(% Rate Very/fairly satisfied)*



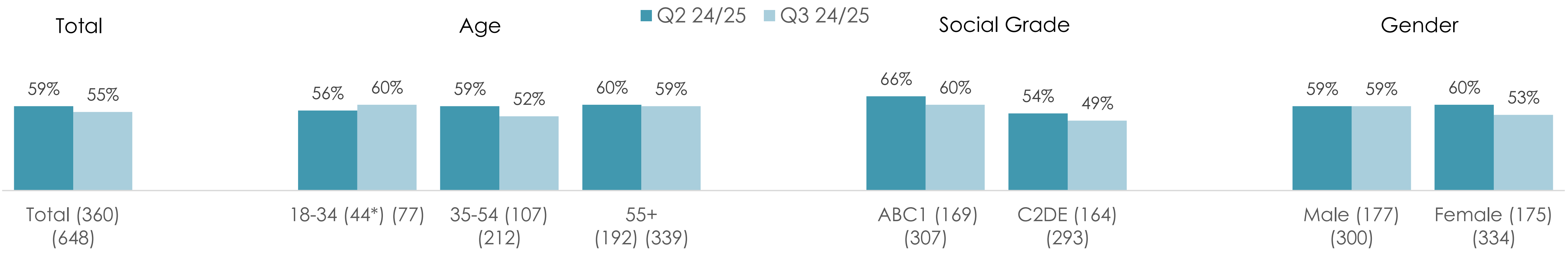
Sig higher than Q3 total
Sig lower than Q3 total

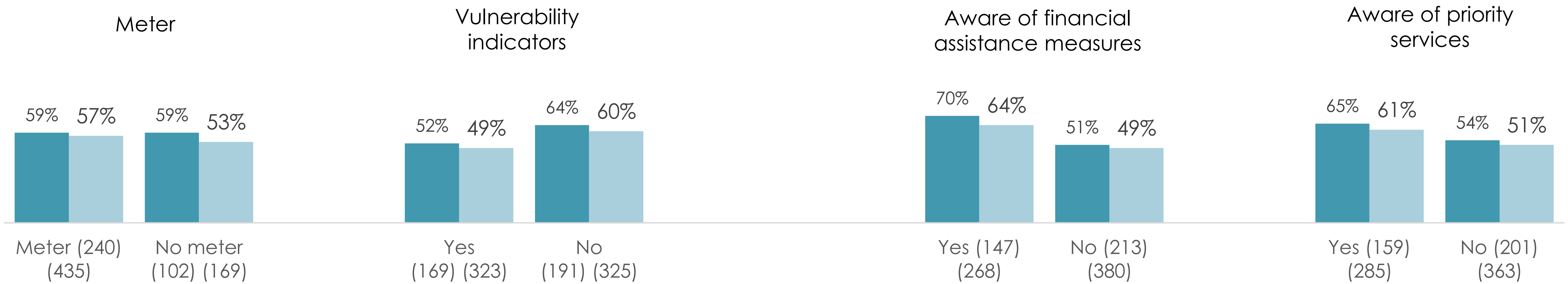
Base: All respondents.

Bill affordability - by key groups Q3 2024/2025

No significant differences between subgroups (vs the total) in terms of the proportion that agree that the water/ sewerage charges are affordable to them.

Q17. How much do you agree or disagree: "The total water and sewerage charges that you pay are affordable to you"?
(% Strongly/tend to agree)





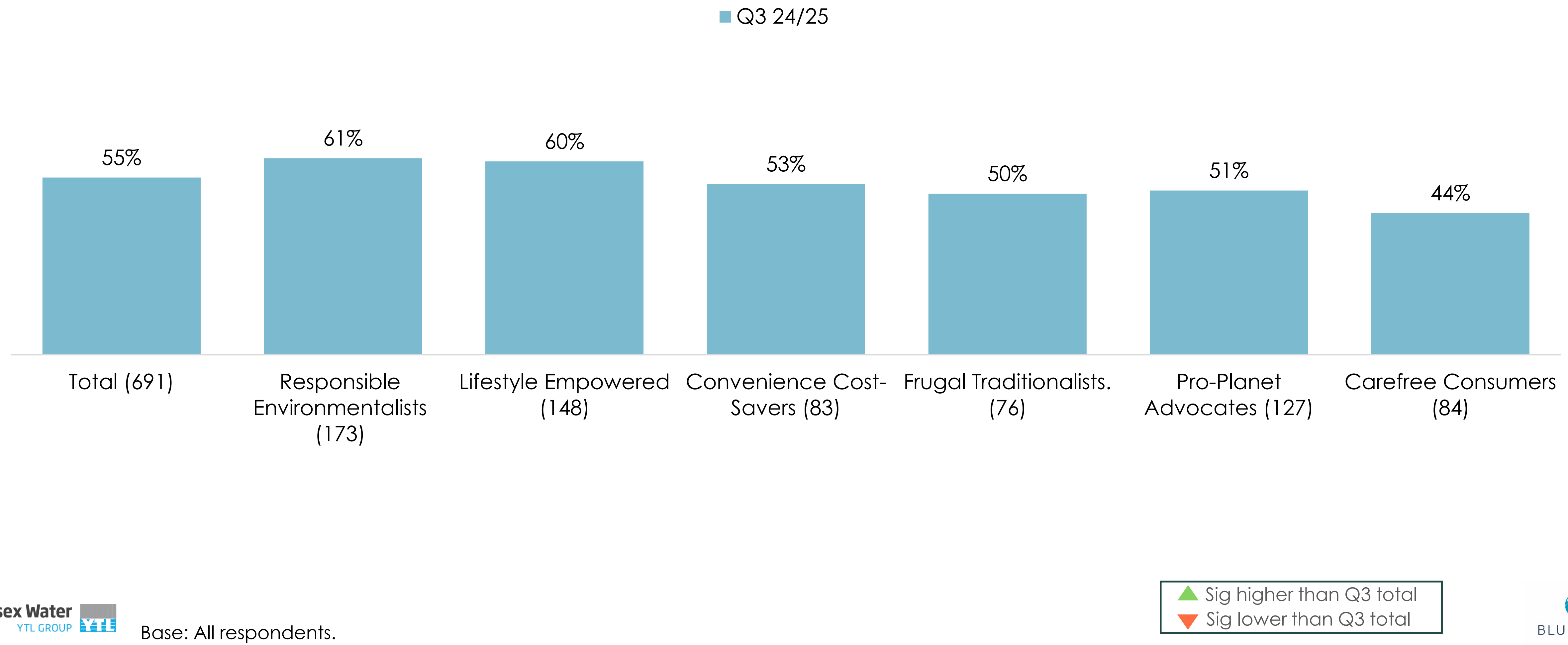
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Bill affordability- by segments Q3 2024/2025

No significant differences between segments versus the total.

Q17. How much do you agree or disagree: "The total water and sewerage charges that you pay are affordable to you"?
(% Strongly/tend to agree)

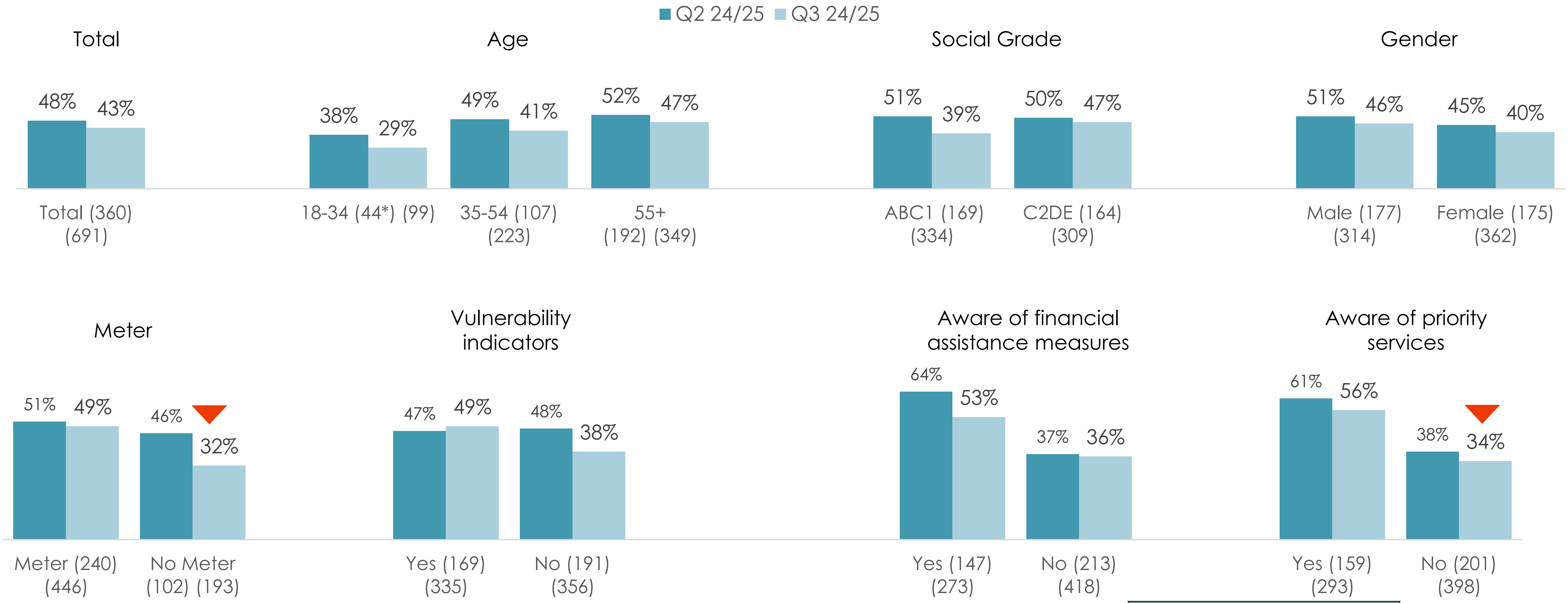


Base: All respondents.

Knowledge about Wessex Water- by key groups Q3 2024/2025

Customers without a meter or unaware of priority services are less likely to feel they know about Wessex Water and what they do.

Q6. How much do you agree or disagree: "How much do you feel you know about Wessex Water and what they do?"
(% A fair amount/a lot)



Sig higher than Q3 total
Sig lower than Q3 total

Wessex Water YTL GROUP

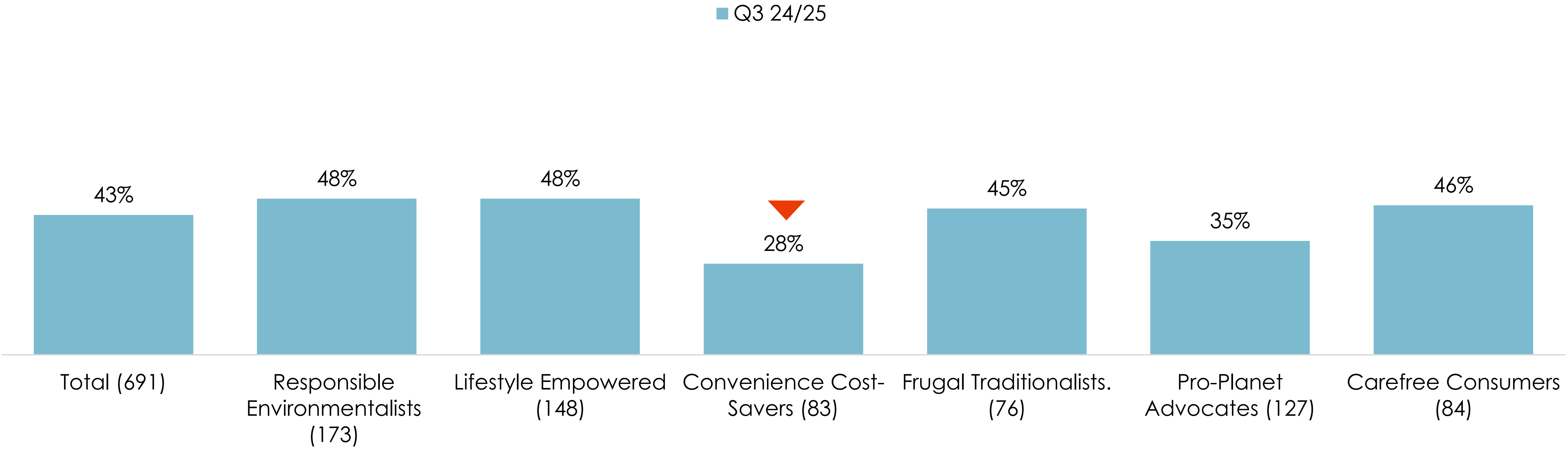
Base: All respondents.

BLUE MARBLE

Knowledge about Wessex Water- by segments Q3 2024/2025

'Convenience Cost-Savers' are less likely to feel they are knowledgeable about Wessex Water and what they do (compared to the total).

Q6. How much do you agree or disagree: "How much do you feel you know about Wessex Water and what they do?"
(% A fair amount/a lot)



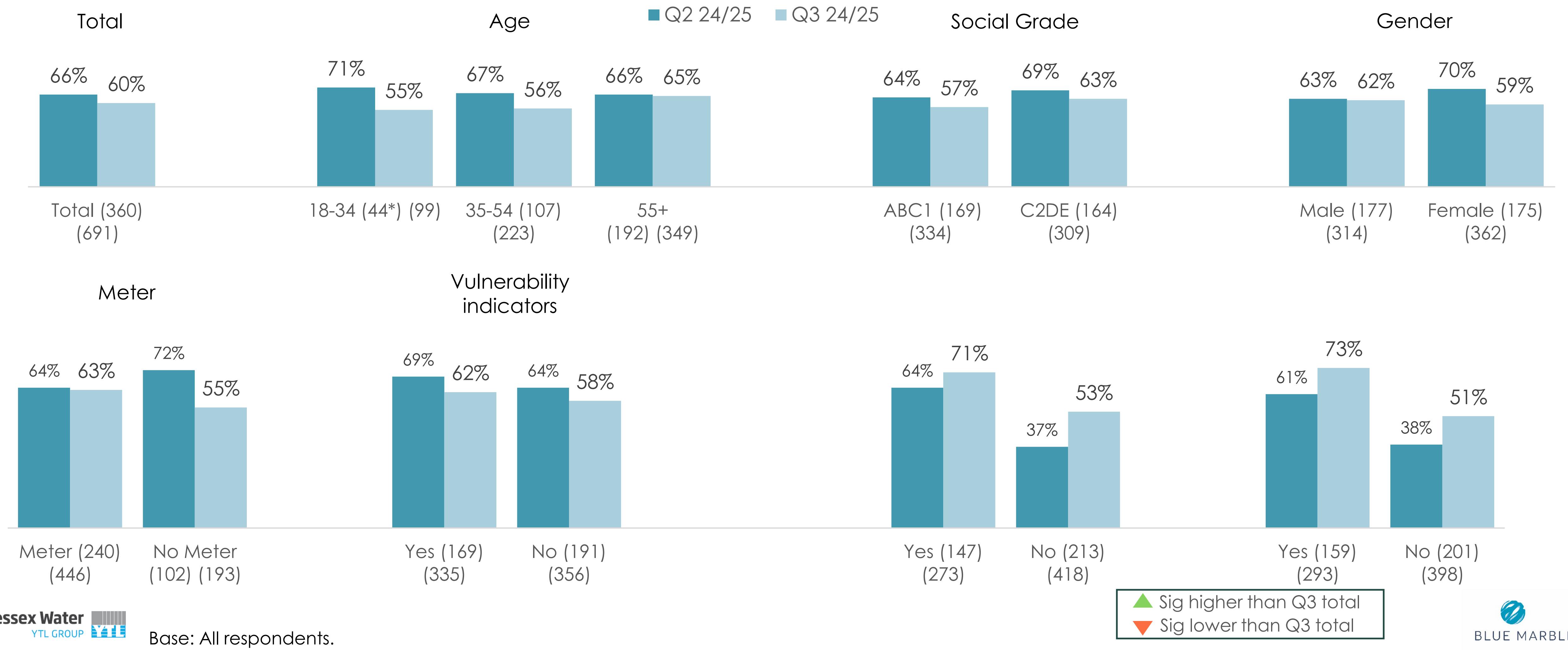
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Opinions of Wessex Water- by key groups Q3 2024/2025

No significant differences between subgroups (vs the total) in terms of positive sentiment towards Wessex Water.

Q4."Now thinking about Wessex Water. Please tell how do you feel about them overall?"
(% Fairly/very positive)

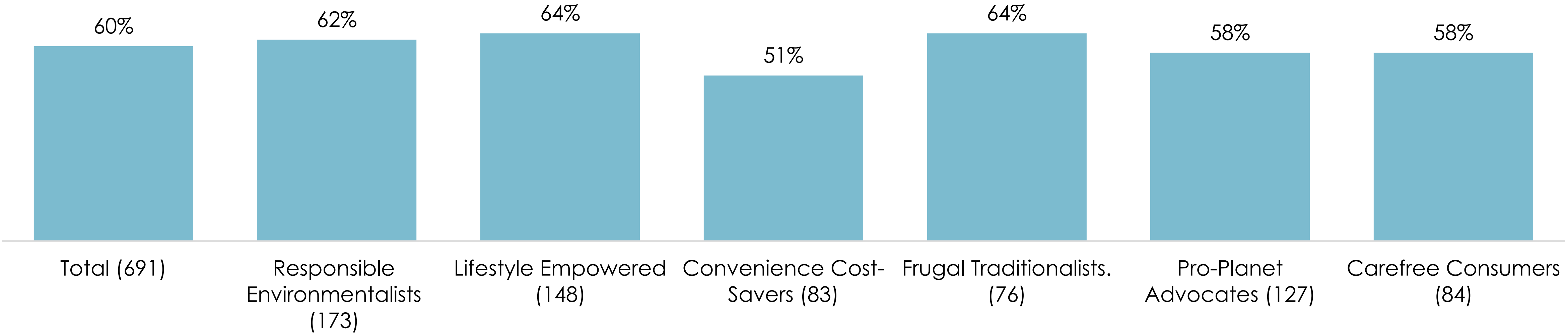


Base: All respondents.

Opinions of Wessex Water- by segments Q3 2024/2025

No significant difference between subgroups (versus the total).

Q4."Now thinking about Wessex Water. Please tell how do you feel about them overall?"
(% Fairly/very positive)



Base: All respondents.

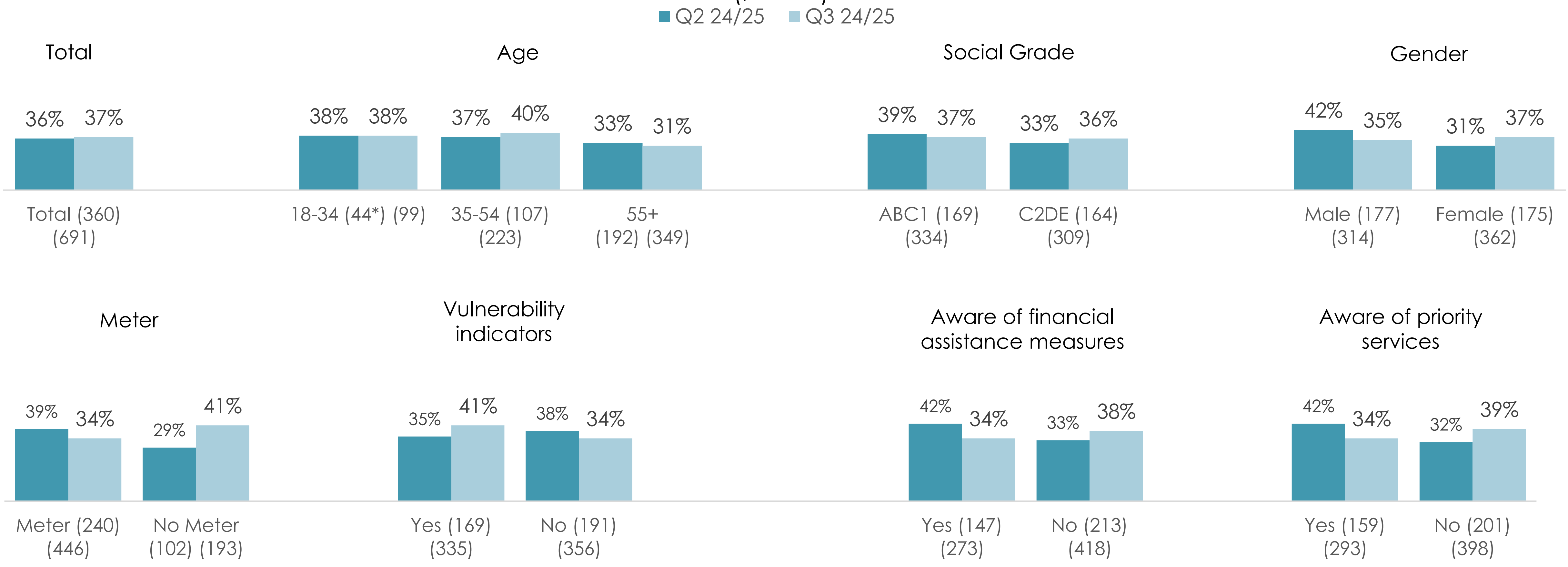
Sig higher than Q3 total
Sig lower than Q3 total

Impressions of water quality - by key groups Q3 2024/2025

No significant differences between the subgroups (vs the total) in terms of the proportion who think that the water quality in their region is poor.

QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality?

(% Poor)



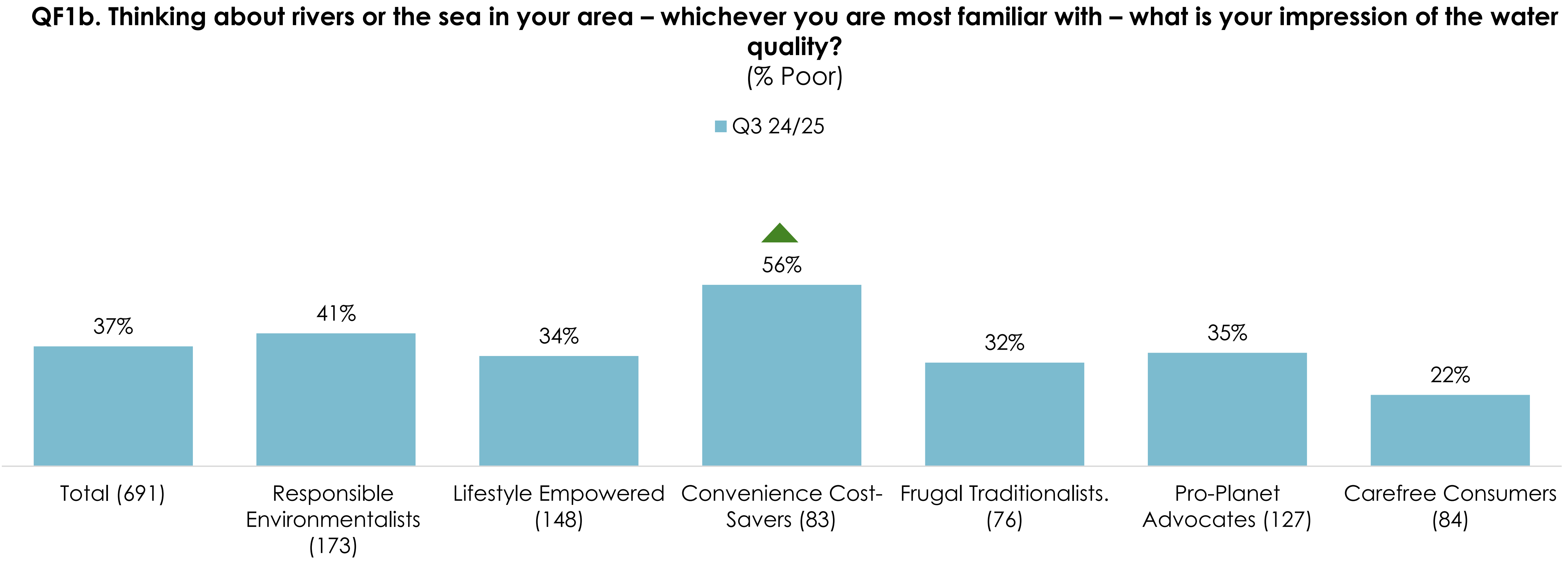
Sig higher than Q3 total

Sig lower than Q3 total

Base: All respondents.

Impressions of water quality - by segments Q3 2024/2025

'Convenience Cost-Savers' are more likely (than the total) to feel that the water quality in their region is poor.



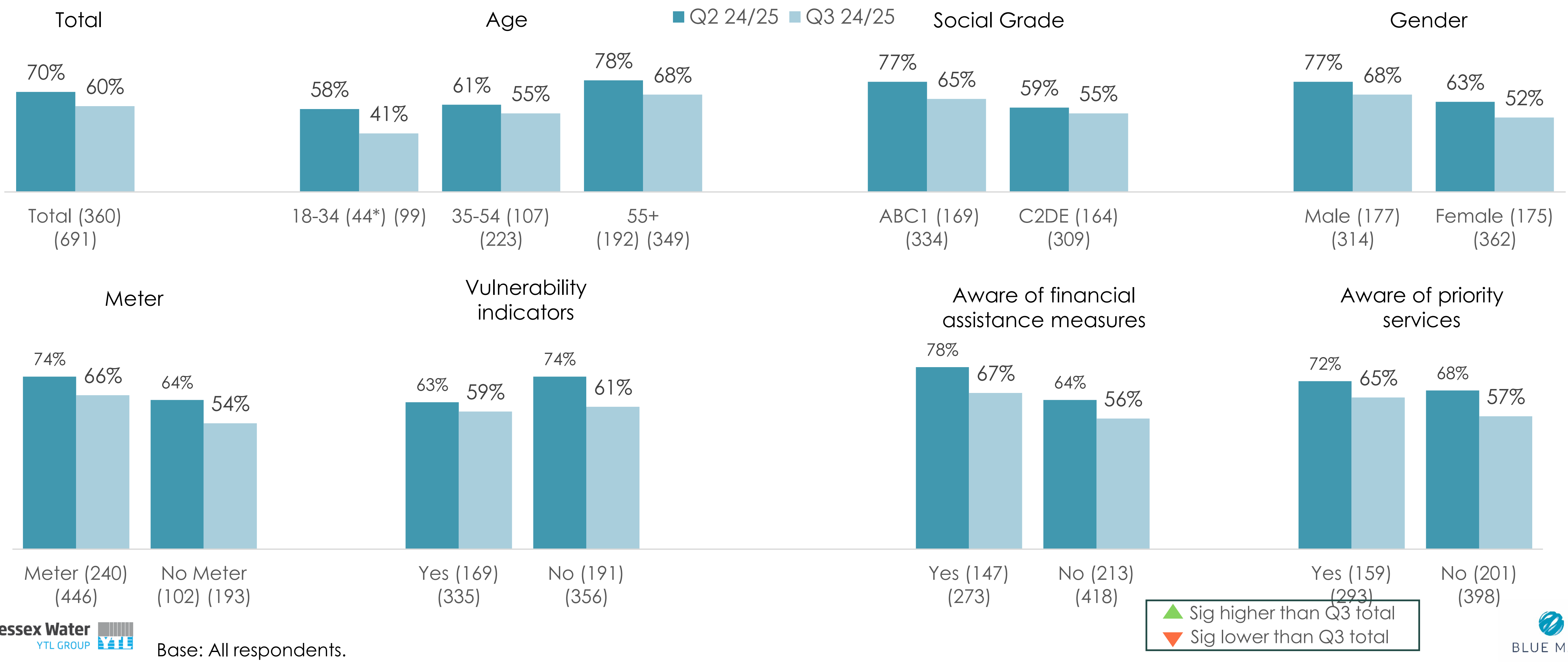
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Awareness of Storm Overflows - by key groups Q3 2024/2025

There are no significant differences between subgroups (vs the total) in terms awareness of storm overflows.

QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?
(% Aware(yes))



Wessex Water YTL GROUP

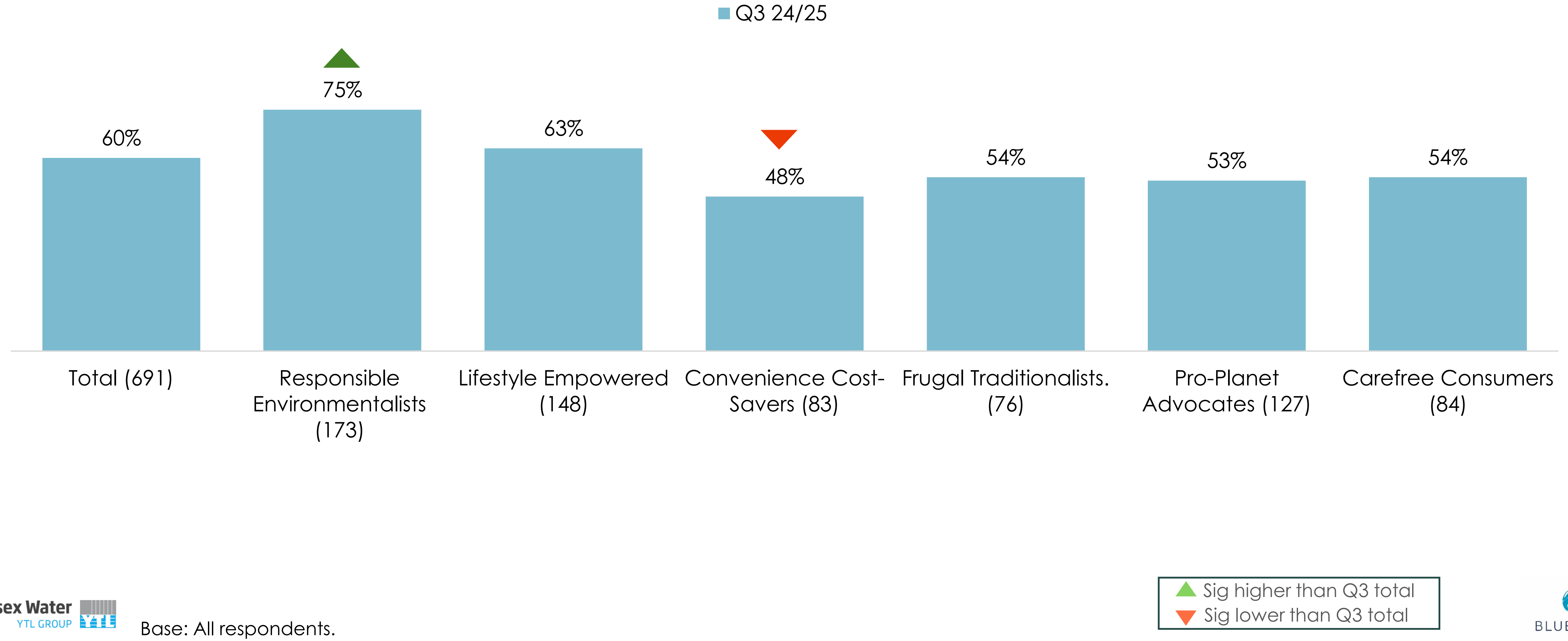
Base: All respondents.

BLUE MARBLE

Awareness of Storm Overflows - by segments Q3 2024/2025

'Convenience Cost-Savers' are less likely to be aware of storm overflows, while 'Responsible Environmentalists' are more likely to be aware of this (vs the total).

QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?
(% Aware(yes))

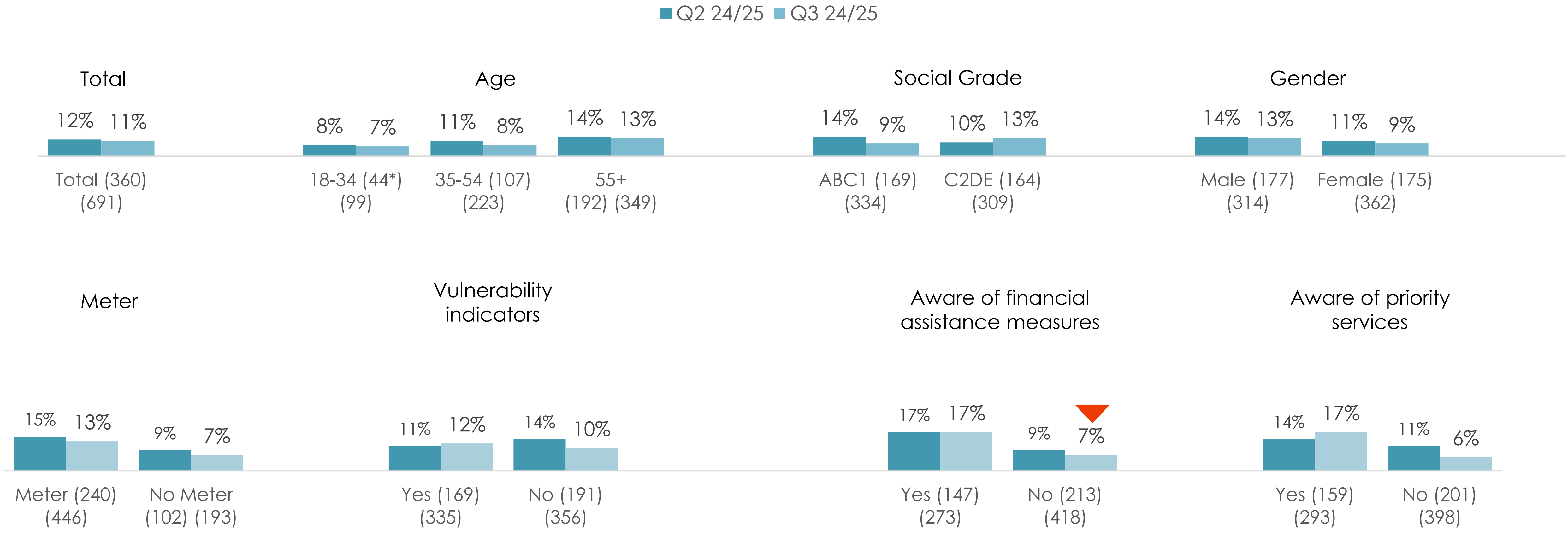


Base: All respondents.

Awareness of WW's activity to reduce Storm Overflows - by key groups Q3 2024/2025

Those not aware of financial assistance measures tend to be less aware of what Wessex Water is doing in terms of reducing storm overflows (versus the average).

F1g. Have you heard or seen any information about what Wessex Water is doing to reduce storm overflows into rivers or the sea?
(% Yes)



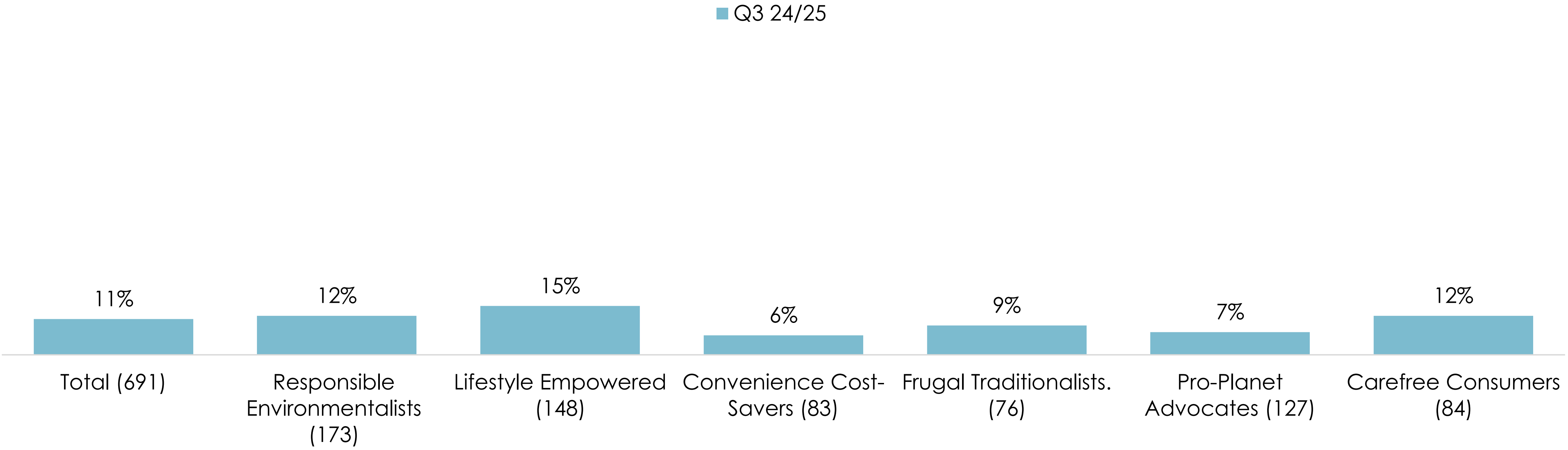
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Awareness of WW's activity to reduce Storm Overflows - by segments Q3 2024/2025

No significant differences (vs the total) with regards to awareness of Wessex Water's efforts to reduce storm overflows.

F1g. Have you heard or seen any information about what Wessex Water is doing to reduce storm overflows into rivers or the sea?
(% Yes)



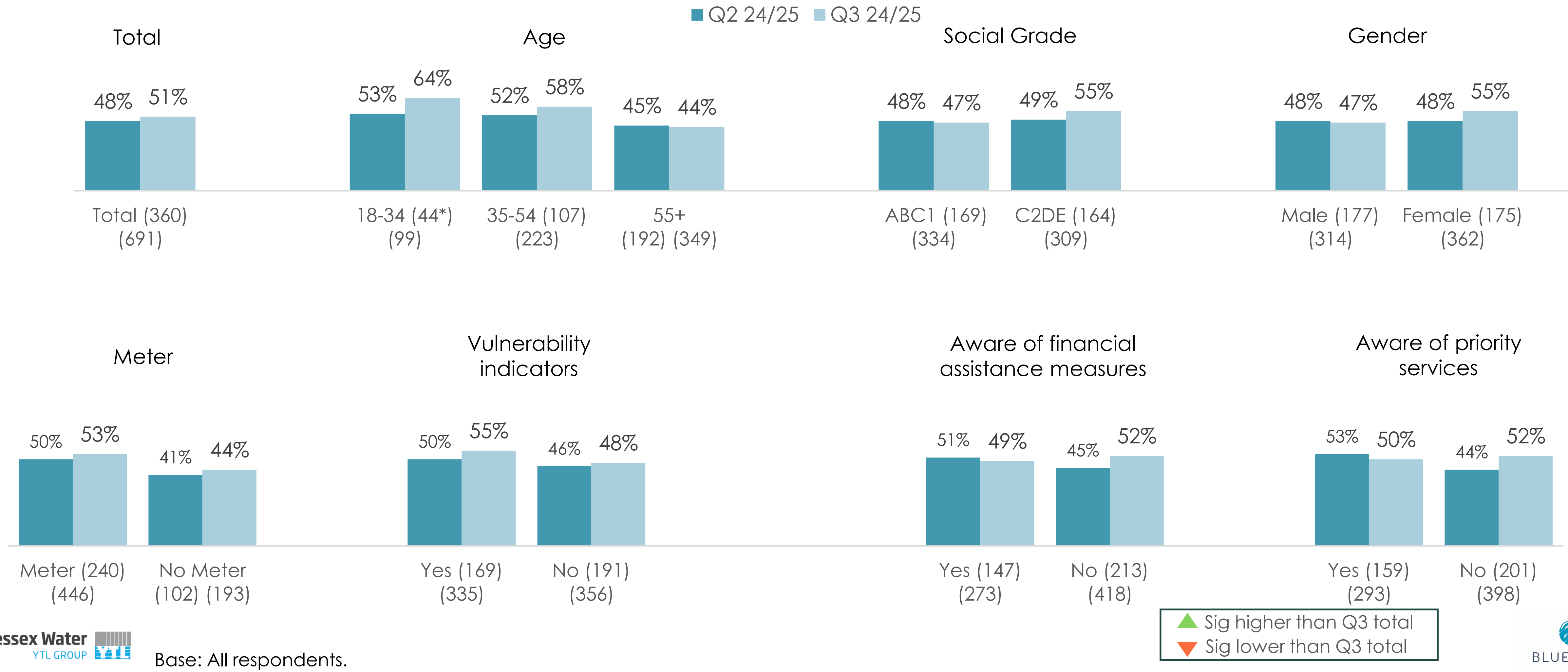
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Interest in the benefits of smart meters - by key groups Q3 2024/2025

No significant differences between subgroups (vs the total) in terms of interest in the benefits of smart water meters.

F1. How much would you agree or disagree with the following statements? : "I'd be interested in having more frequent updates on how much water I'm using and how much it is costing"
(% Strongly/tend to agree)



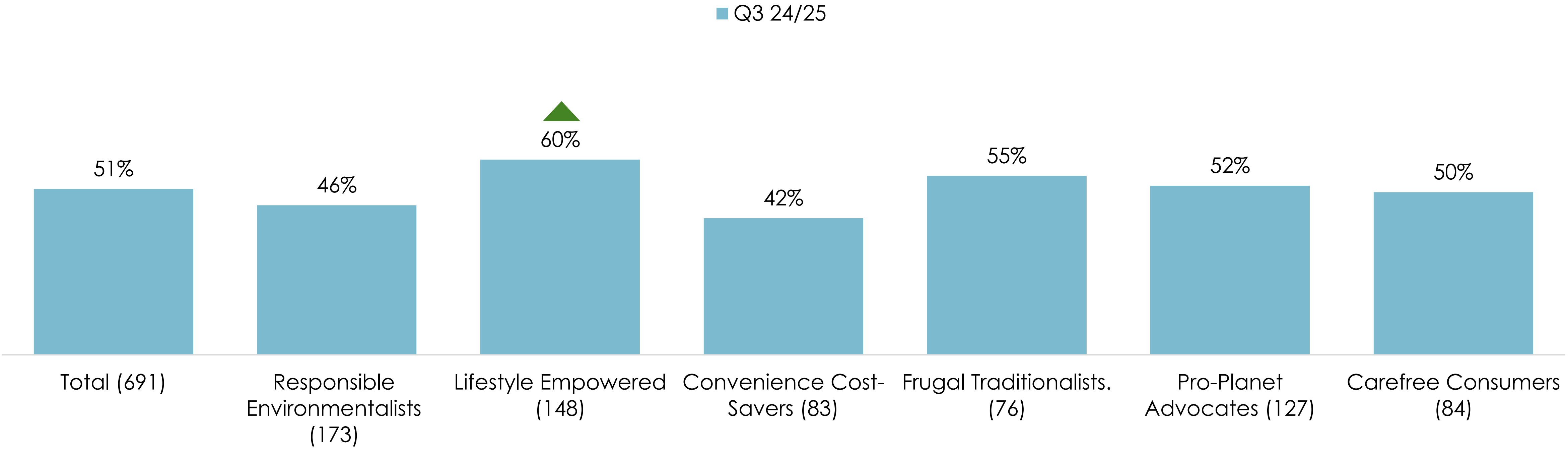
Base: All respondents.

Interest in the benefits of smart meters - by segments Q3 2024/2025

'Life Empowered' consumers are more likely to be interested in the benefits of smart meters (vs. the total).

F1. How much would you agree or disagree with the following statements? : "I'd be interested in having more frequent updates on how much water I'm using and how much it is costing"

(% Strongly/tend to agree)



Sig higher than Q3 total
Sig lower than Q3 total

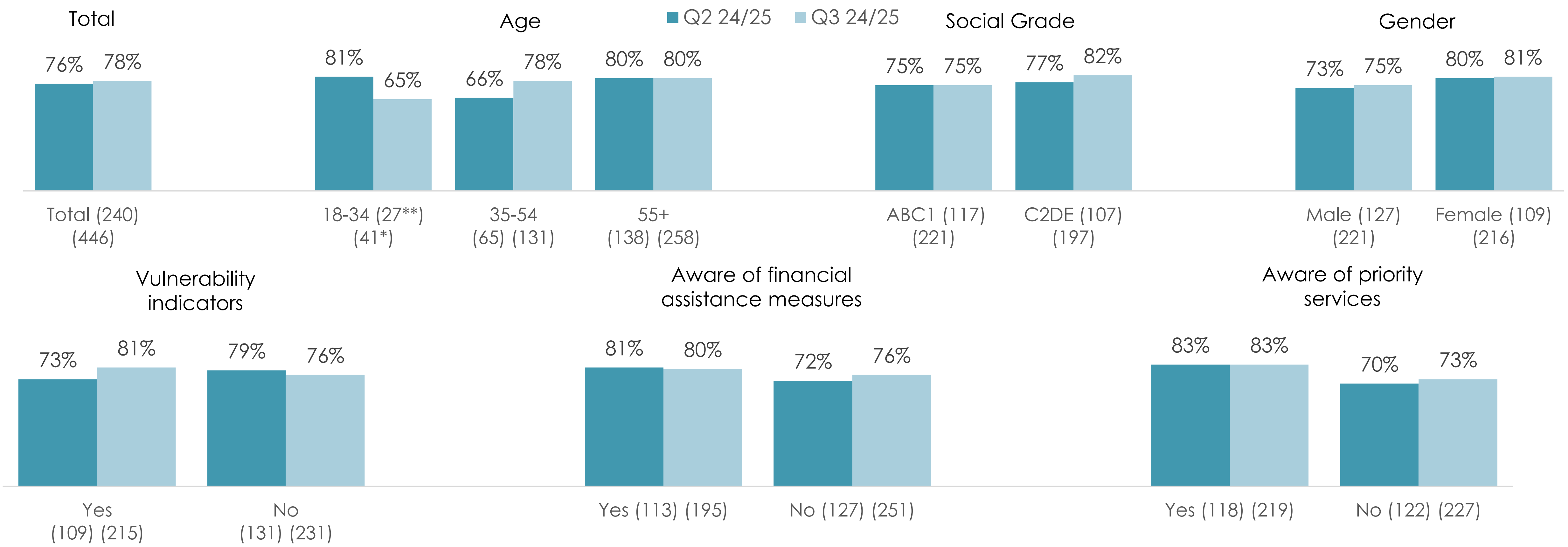
Base: All respondents.

Managing water use to keep bills down - by key groups Q3 2024/2025

No significant differences in terms of the proportion that agree that they manage their water to keep water bills down.

F1. How much would you agree or disagree with the following statements? : "I manage my water use to keep the water bill down"

(% Strongly/tend to agree, among those who have a water meter)



Sig higher than Q3 total
Sig lower than Q3 total

Wessex Water YTL GROUP

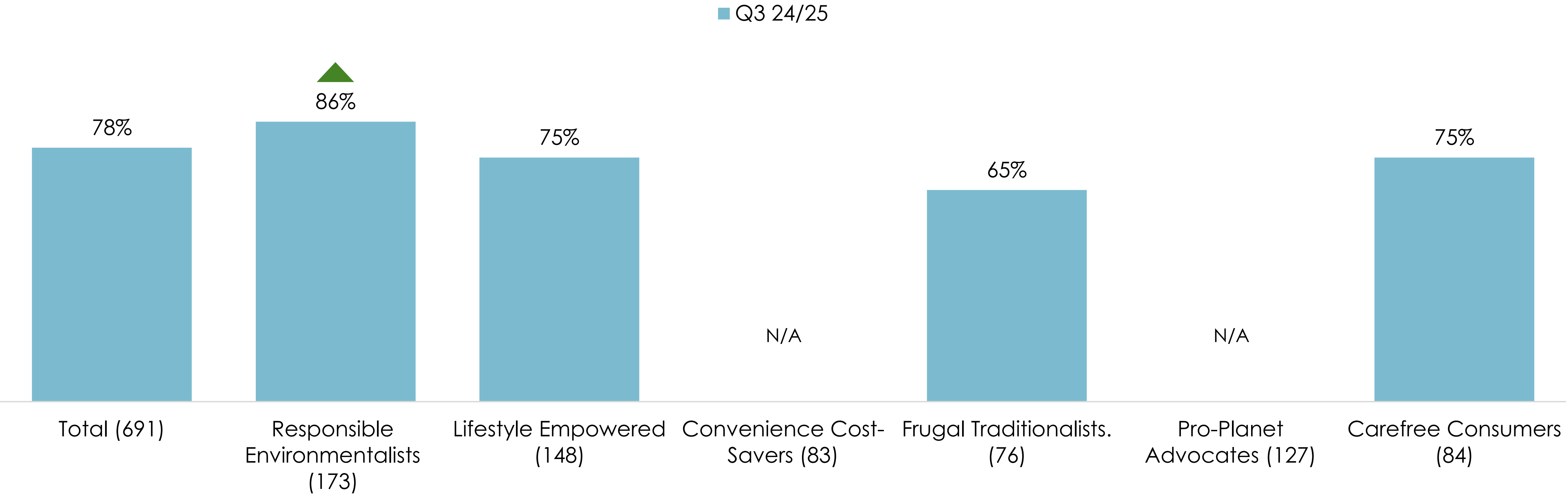
Base: All respondents.

BLUE MARBLE

Managing water use to keep bills down - by segments Q3 2024/2025

'Responsible Environmentalists' are more likely to feel they manage their water use to keep bills down (vs. the total).

F1. How much would you agree or disagree with the following statements? : "I manage my water use to keep the water bill down"
(% Strongly/tend to agree, among those who have a water meter)



Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Wessex Water YTL GROUP

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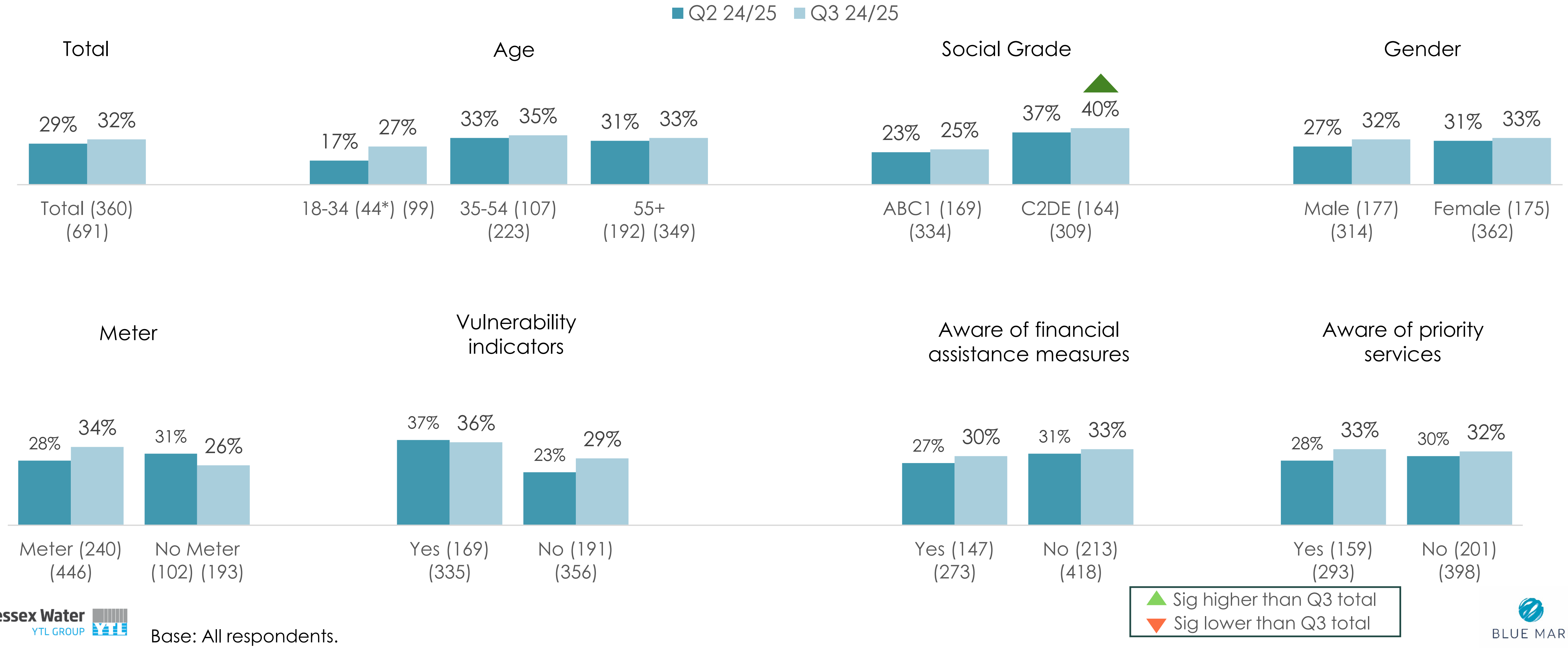
Reducing water use - by key groups Q3 2024/2025

Those in lower social grades are more likely to feel unsure of how to reduce their water usage.

F1. How much would you agree or disagree with the following statements? : "I'm not sure how I can reduce my household's water use"

(% Strongly/tend to agree)



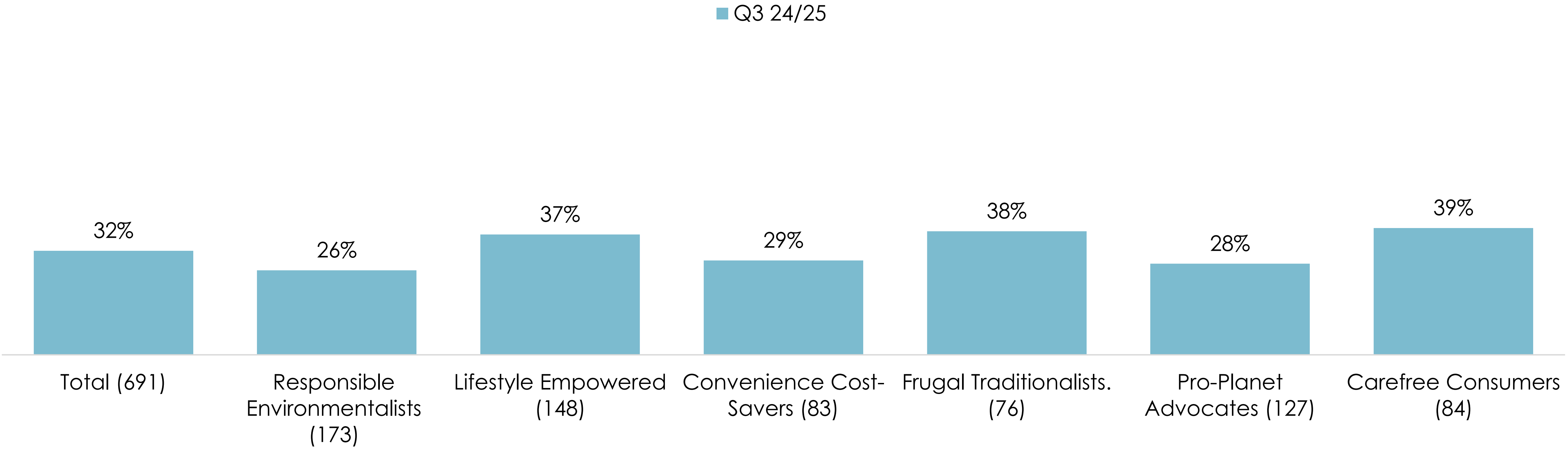
Base: All respondents.

Reducing water use - by segments Q3 2024/2025

No significant difference between segments (vs the total) in the proportion who agree that they are not sure how to reduce their water use.

F1. How much would you agree or disagree with the following statements? : "I'm not sure how I can reduce my household's water use"

(% Strongly/tend to agree)



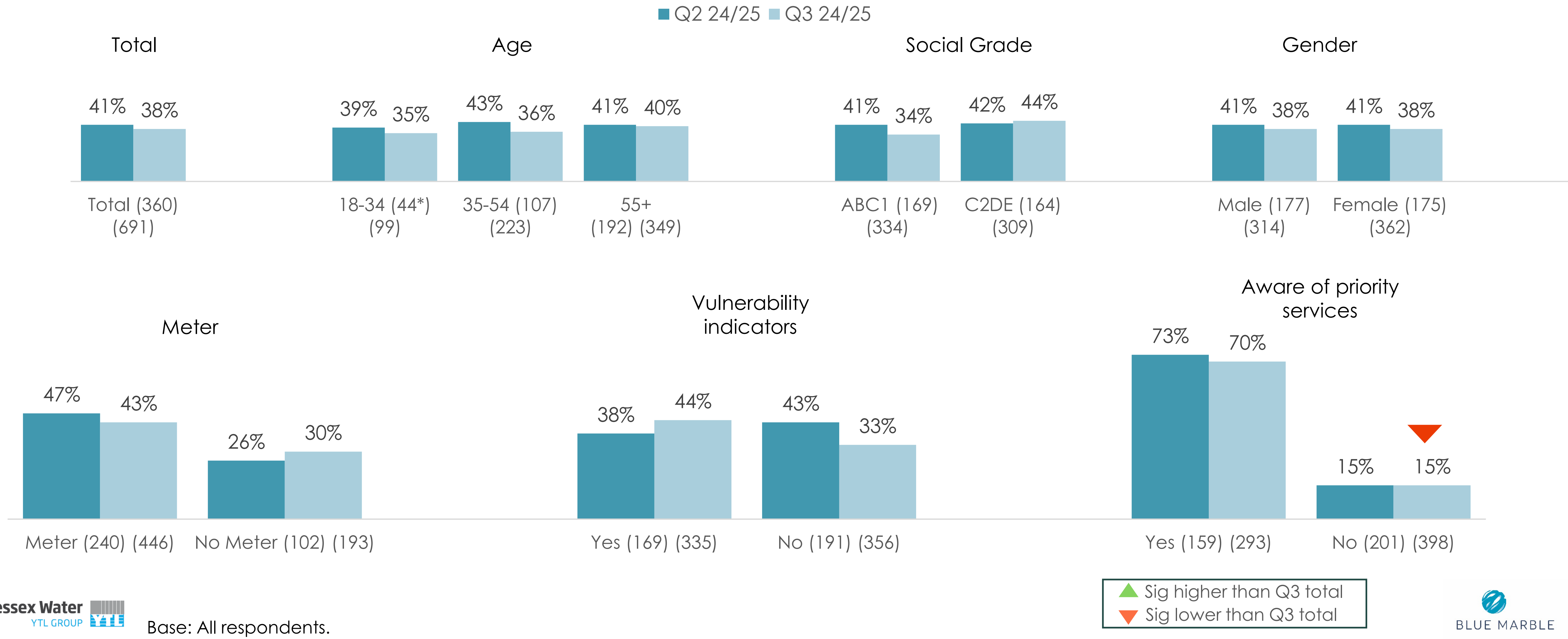
Sig higher than Q3 total
Sig lower than Q3 total

Base: All respondents.

Awareness of financial aid provided by Wessex Water - by key groups Q3 2024/2025

Those unaware of priority services are also less likely to be aware of financial assistance provided by Wessex Water.

Q20r1. Are you aware of Wessex Water doing any of the following? "Assisting customers who struggle to afford their water bill"
(% Yes)

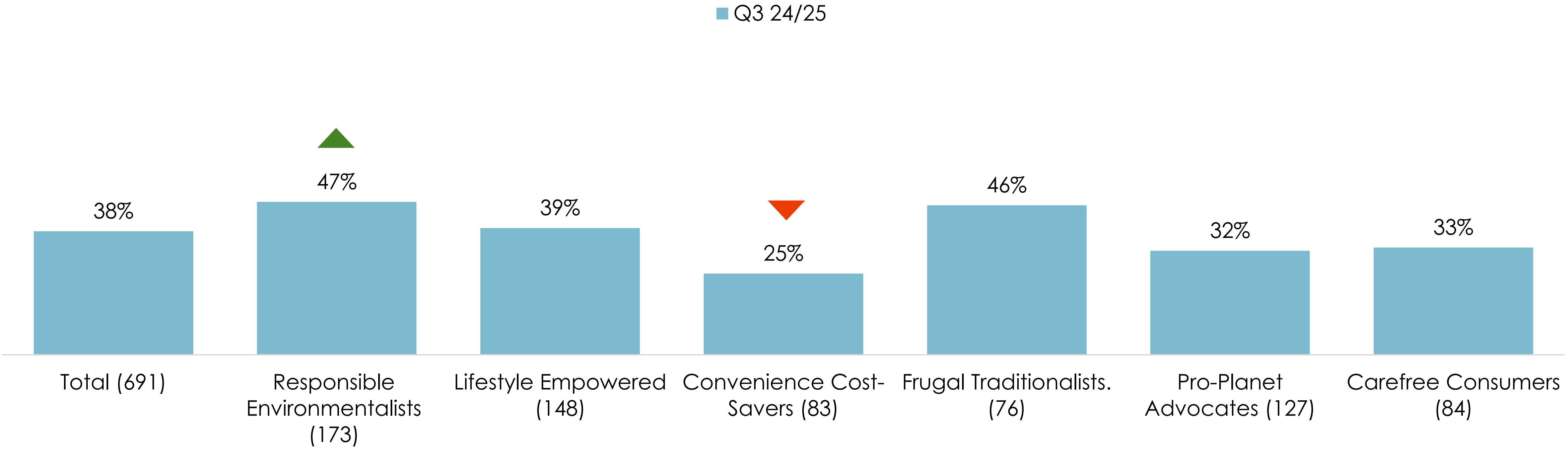


Base: All respondents.

Awareness of financial aid provided by Wessex Water - by segments Q3 2024/2025

‘Responsible Environmentalists’ are more like than average to be aware of financial assistance provided by Wessex Water, while ‘Convenience Cost-Savers’ are less likely to be aware of these provisions.

Q20r1. Are you aware of Wessex Water doing any of the following? “Assisting customers who struggle to afford their water bill”
(% Yes)



Sig higher than Q3 total
Sig lower than Q3 total

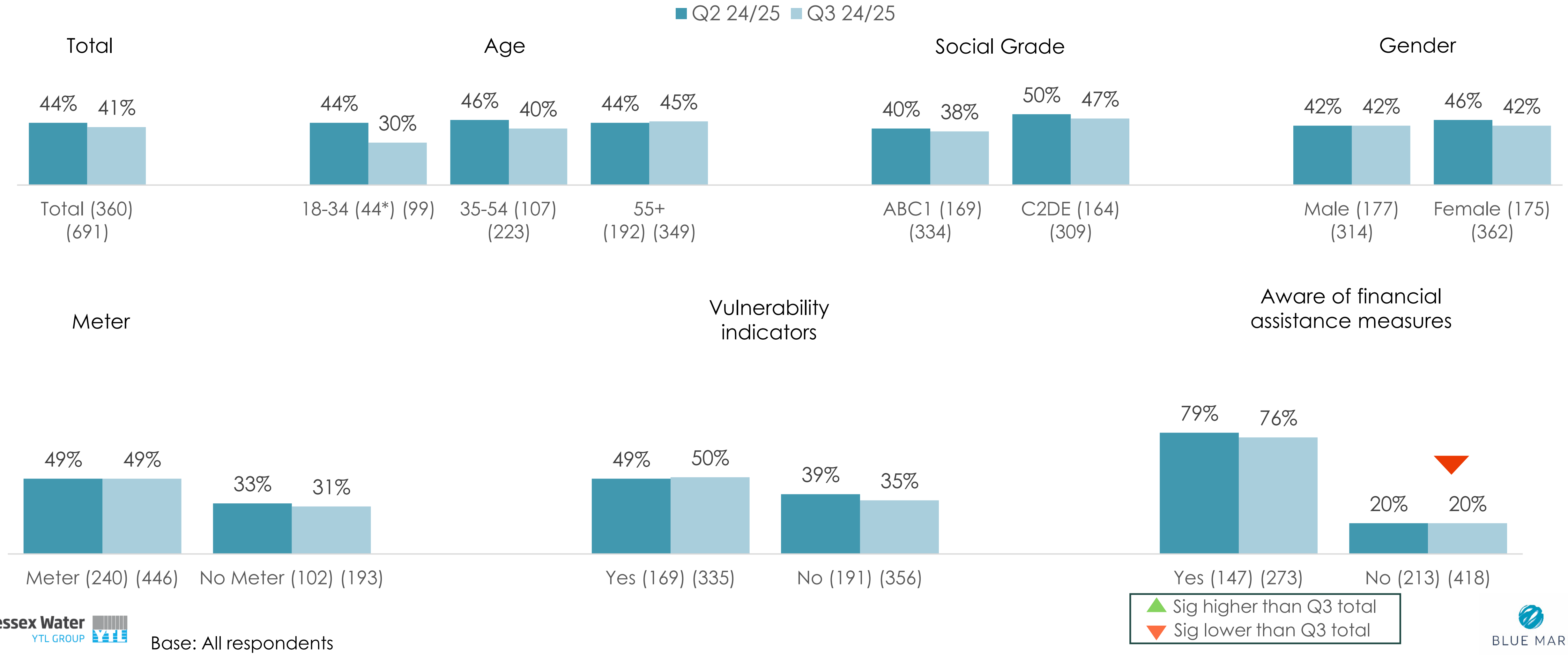
Base: All respondents.

Awareness of priority services provided by Wessex Water - by key groups Q3 2024/2025

Those unaware of financial aid provided by Wessex Water are also less likely to be aware of their priority services too.

Q20r2. Are you aware of Wessex Water doing any of the following? : "Providing priority services for customers who need them, such as braille or extra support during a supply interruption."

(% Yes)



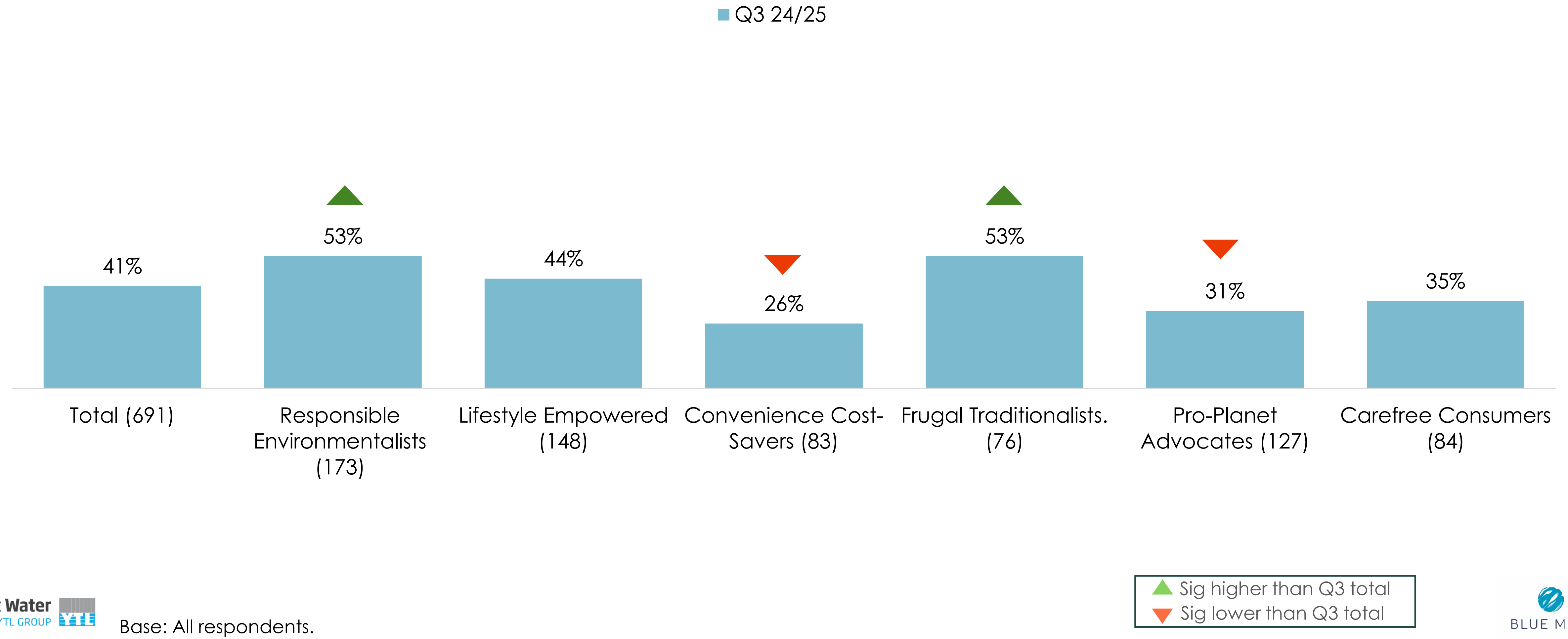
Base: All respondents

Awareness of priority services provided by Wessex Water - by segments Q3 2024/2025

'Responsible Environmentalists' and 'Frugal Traditionalists' are more like than average to be aware of financial assistance provided by Wessex Water, while 'Convenience Cost-Savers' are less likely to be aware of these provisions.

Q20r2. Are you aware of Wessex Water doing any of the following? : "Providing priority services for customers who need them, such as braille or extra support during a supply interruption."

(% Yes)



Base: All respondents.

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