



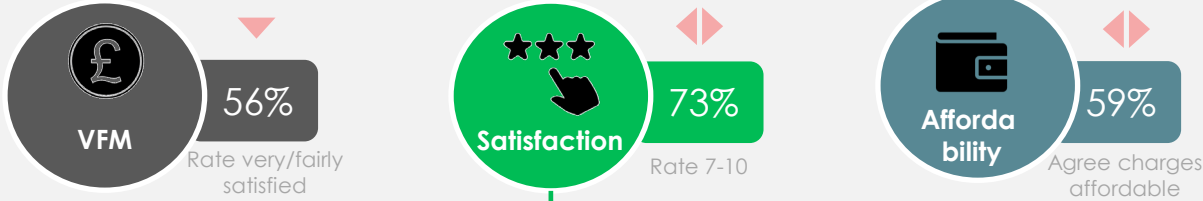
Image Tracker Jul-Sep 2024

Summary of key results
23rd October, 2024



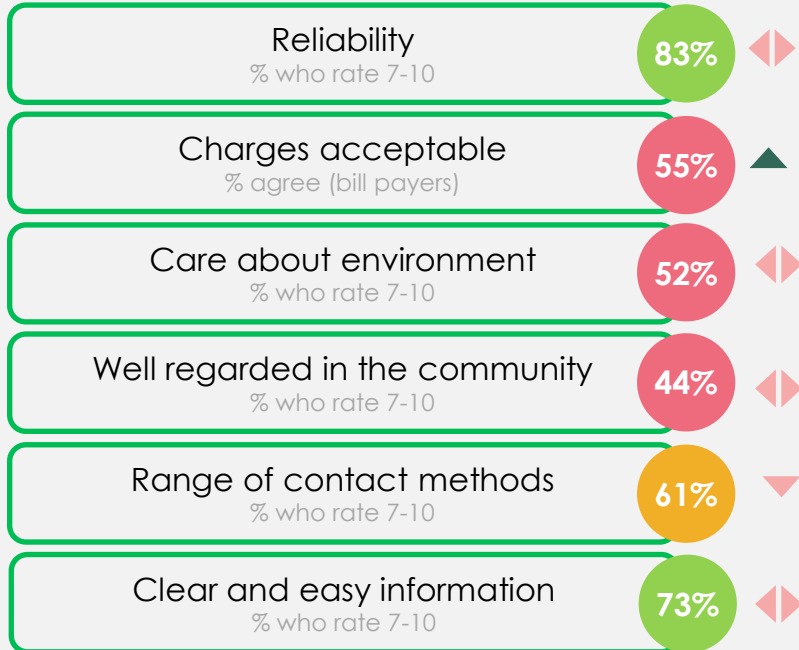
Quarterly Dashboard Update (Jul-Sep 2024 vs. Apr-Jun 2024)

Core performance

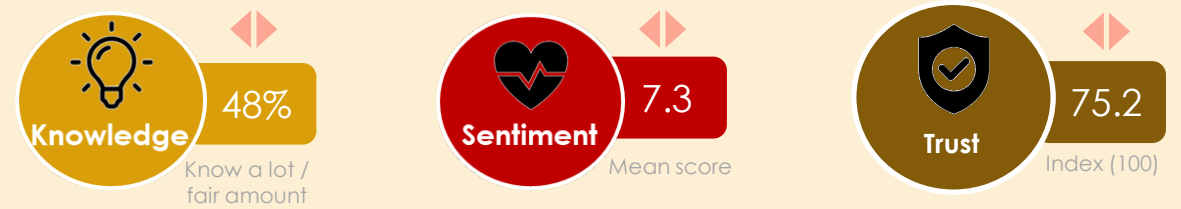


Satisfaction drivers

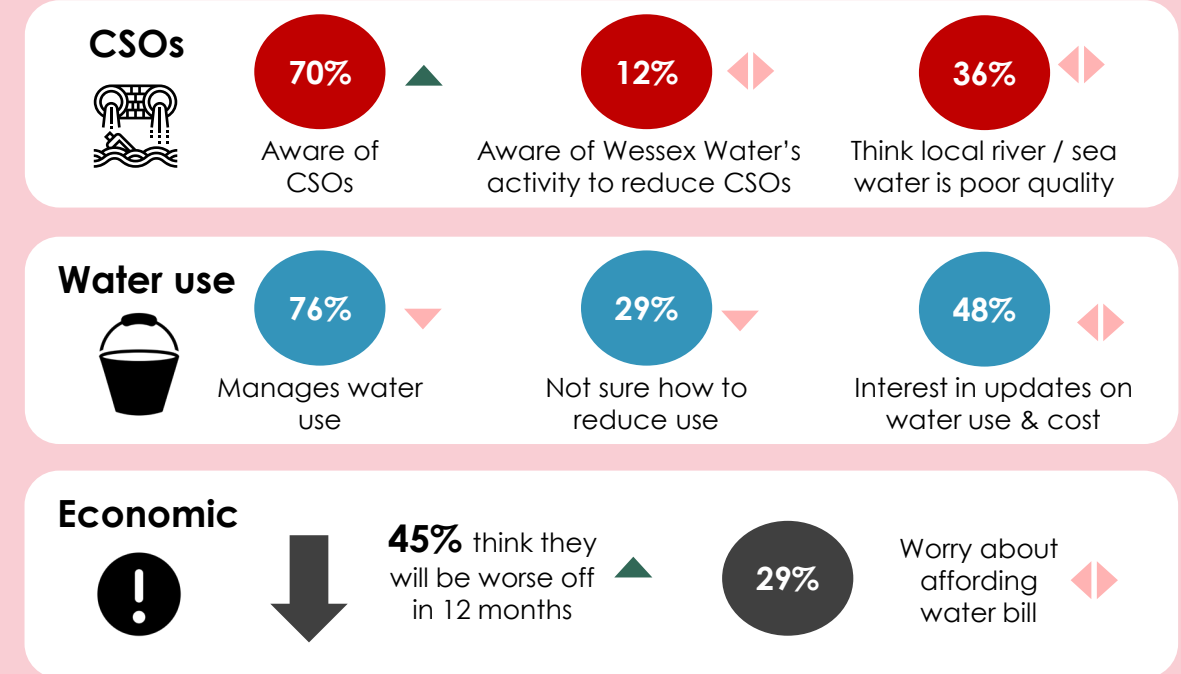
MOST IMPORTANT



Brand health



Hot topics



Key: Significant increase Directional increase Significant decrease Directional decrease No change (less than 3% pt. change)

Changes are Jul-Sep 2024 vs. Apr-Jun 2024

Customer sample used from Q1 2024-2025 (excludes non-bill payers)



Headline Summary: Jul-Sep 2024

1

Uncertainty about financial outlook among Wessex Water customers has decline - perhaps reflecting some stability post-election.

2

Supporting customers financially is a greater priority that customers feel Wessex Water should address. However, levels of anxiety about affording water bills and satisfaction for value for money holds steady.

3

Satisfaction of Wessex Water overall and positive sentiment towards the company holds stable. However, there is a drop in performance scores in metrics relating to being easy to contact and fixing problems compared to the previous Quarter (but in line with Q4).

4

Environment and ensuring a reliable water supply remain the top issues that customers feels that Wessex Water should address. Trust in Wessex Water's ability to provide water holds steady, while there is a further decline in trust in Wessex Water's ability to handle wastewater (significantly lower than in Q4 23/24).

5

Attitudes towards water saving holds steady, as does perceptions of water resources in the Wessex region. Not running the tap while rinsing dishes has grown more prevalent over the last two Quarters, as does the adoption of water efficient appliances.

6

Awareness of CSOs have jumped significantly from the previous Quarter and is in line with FY 23/24 primarily driven by news coverage. However, perceptions of water quality in the region holds steady. Awareness of what Wessex Water is addressing this issue holds steady – with Wessex Water communications playing a significant role in driving this awareness.

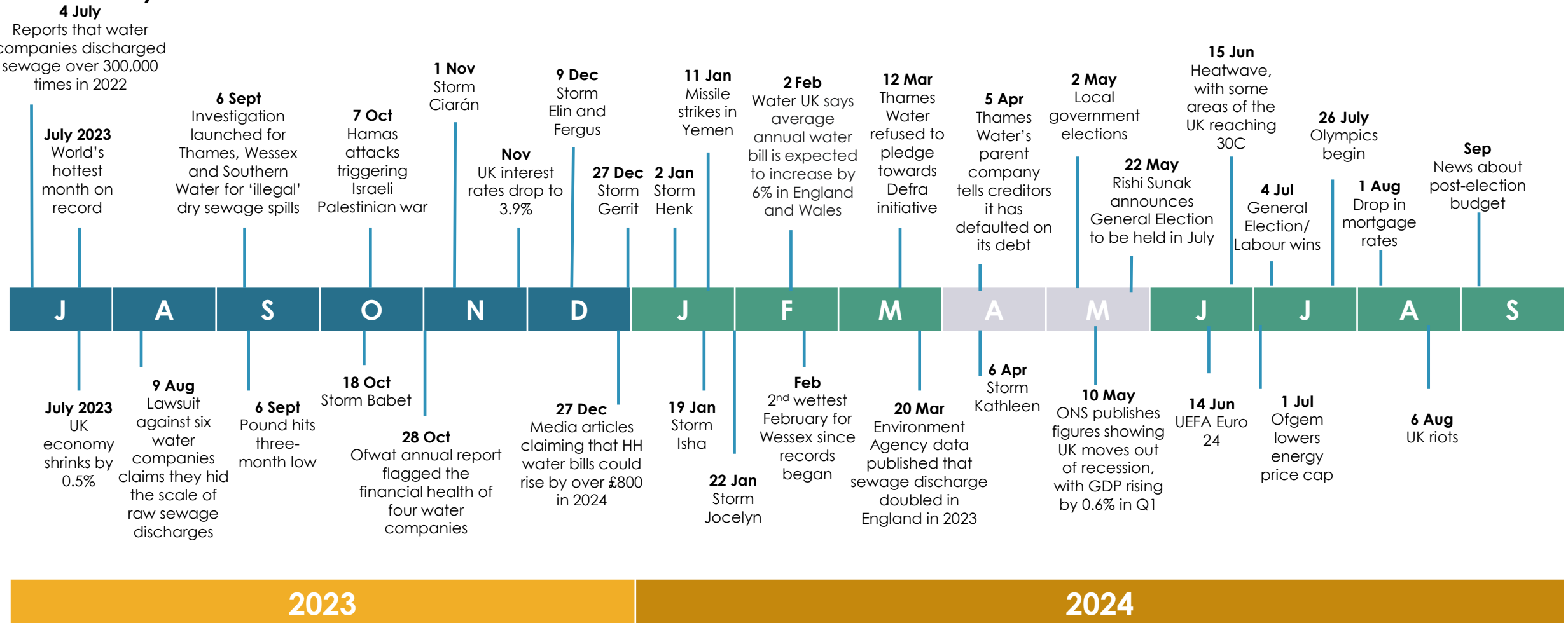


Wider context

Overall context: Jul-Sep 2024

The last Quarter had many political and social events, including the general election, a decline in mortgage rates and the Olympics. The UK experienced social unrest with riots in early August. Additionally, there is growing apprehension around the post-election budget at the end of September/October leaving many uncertain about personal finances.

Timeline of key events



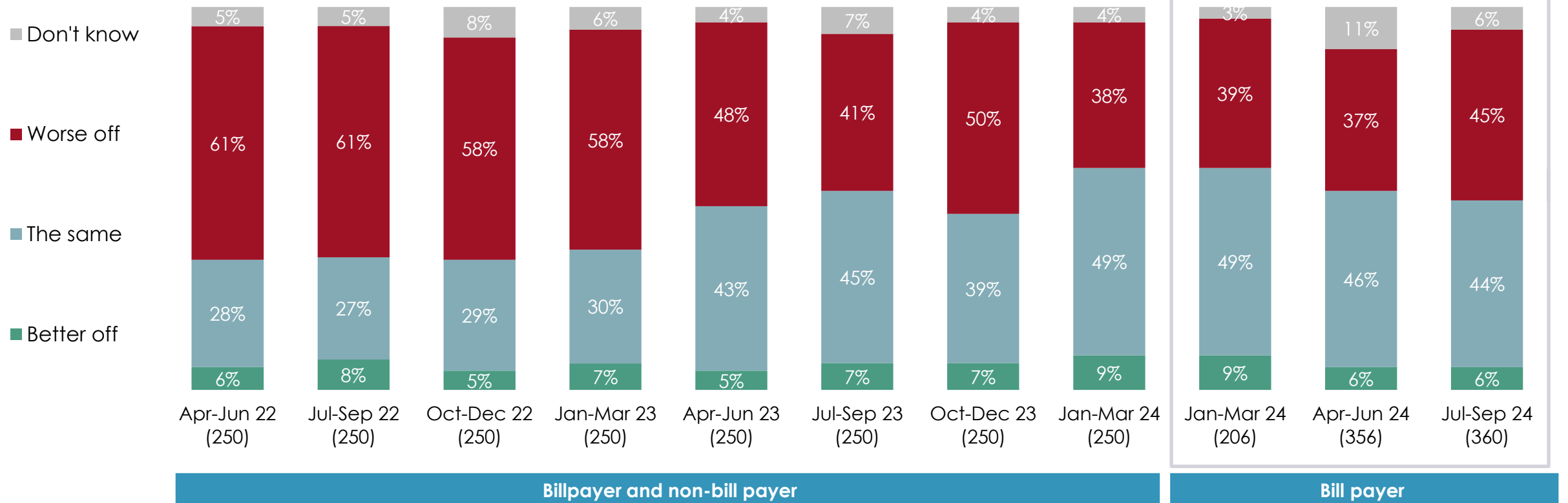
Customer sample used from Q1 2024/2025 (excludes non-bill payers) and only interviewed in June only

* Source <https://blog.metoffice.gov.uk/2024/07/16/whats-happened-to-summer-so-far>

There is a decline in the proportion of Wessex Water customers who say 'don't know' versus the previous Quarter, which may be due to greater clarity about their financial circumstances after the pre-election period.



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*

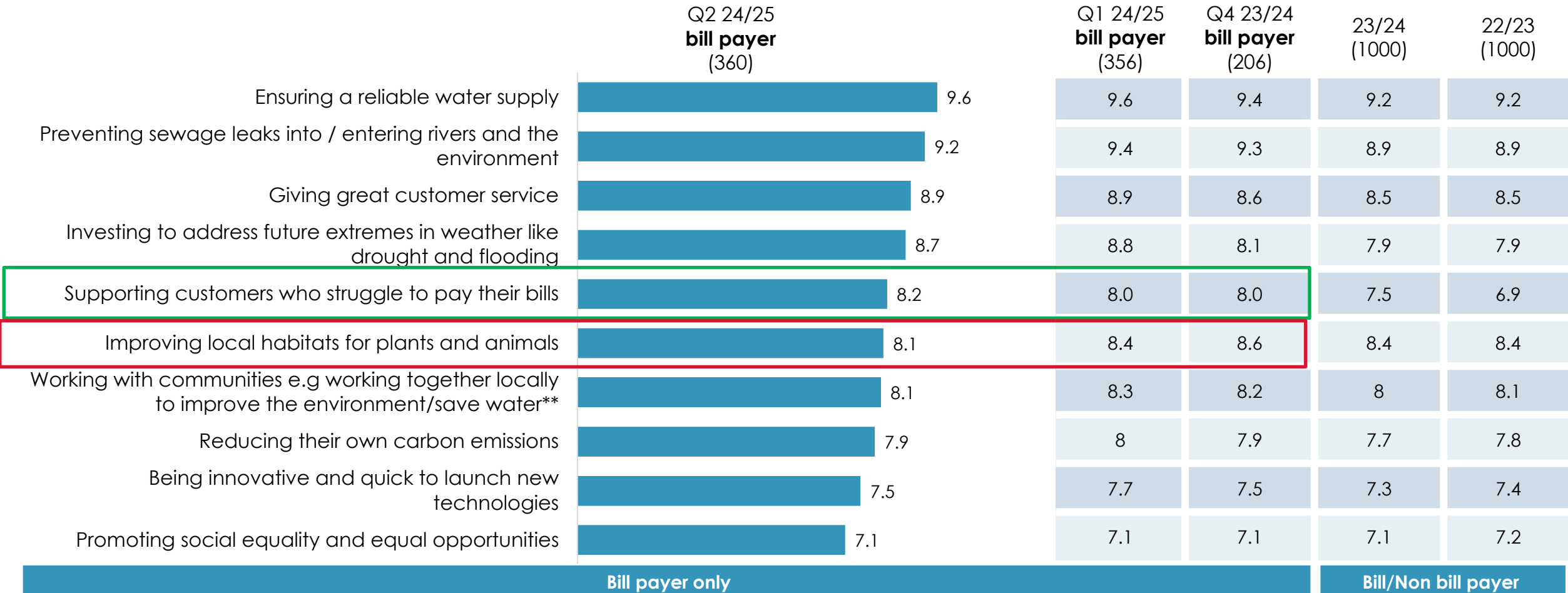


What's important for Wessex Water to focus on?

Ranking of priorities remains consistent. However, importance placed on 'improving local habitats' decreases, and customers place more importance on 'supporting customers who struggle to pay their bills' in the latest Quarter.

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



New wording introduced at Q2 2023-4**

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

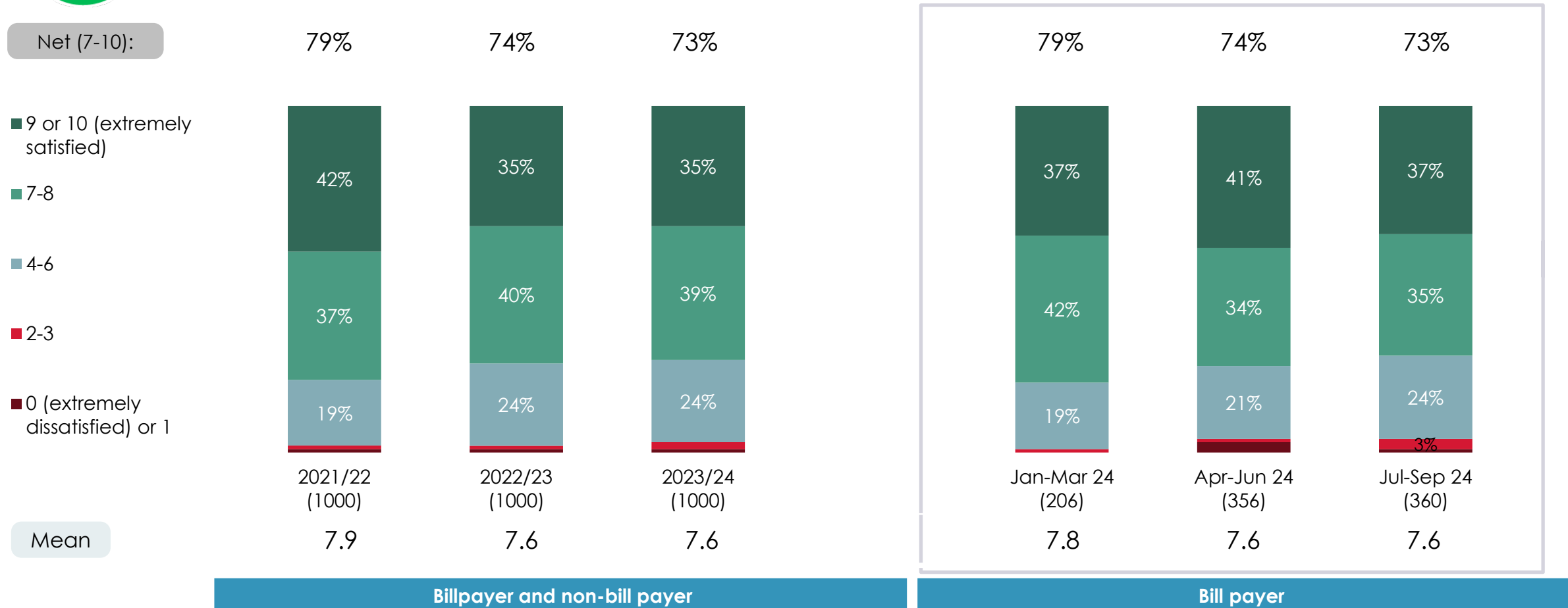


Core measures

Satisfaction with Wessex Water remains stable.



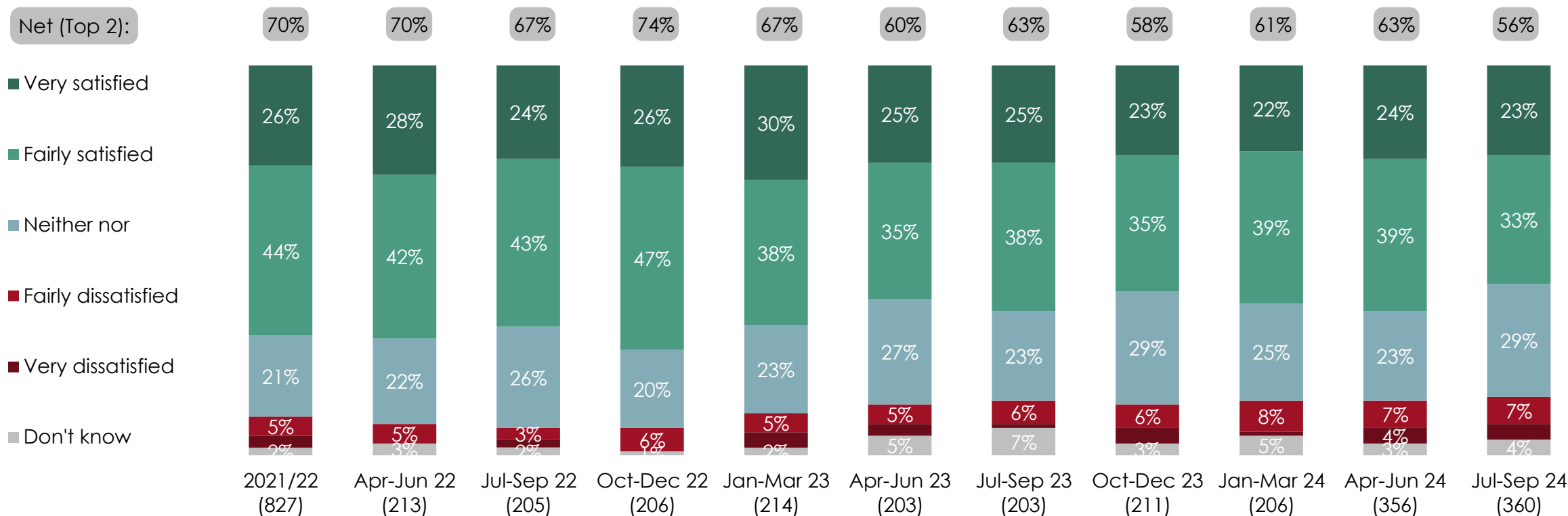
Q11. Taking everything into account how satisfied are you with Wessex Water? *Base: All respondents*



Satisfaction with value for money declines compared the previous Quarter, and is at the lowest level it has been, but without an explicit increase in dissatisfaction.



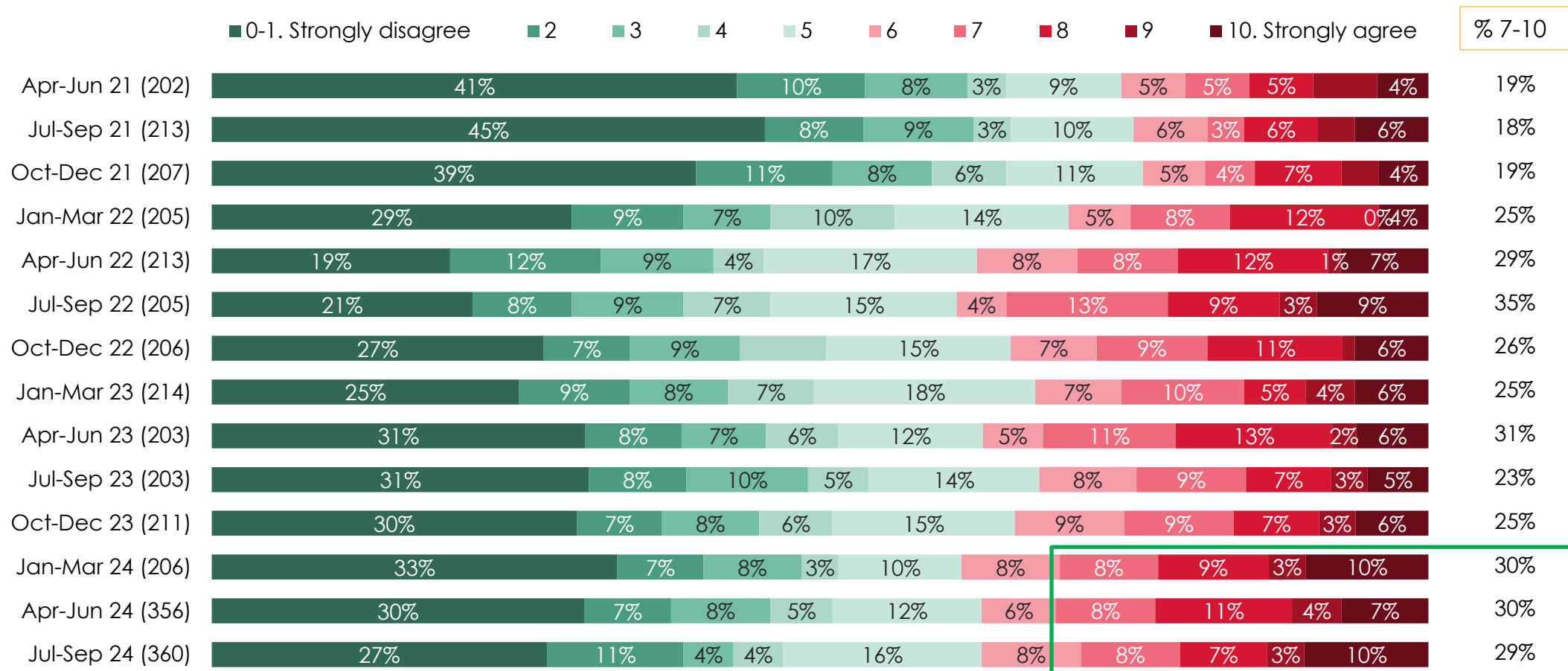
Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? *Base: All bill payers*



The proportion of those concerned about water bill affordability remains similar to the last Quarter but higher than this time last year.

Q15. How strongly do you agree or disagree...? Base: All bill payers

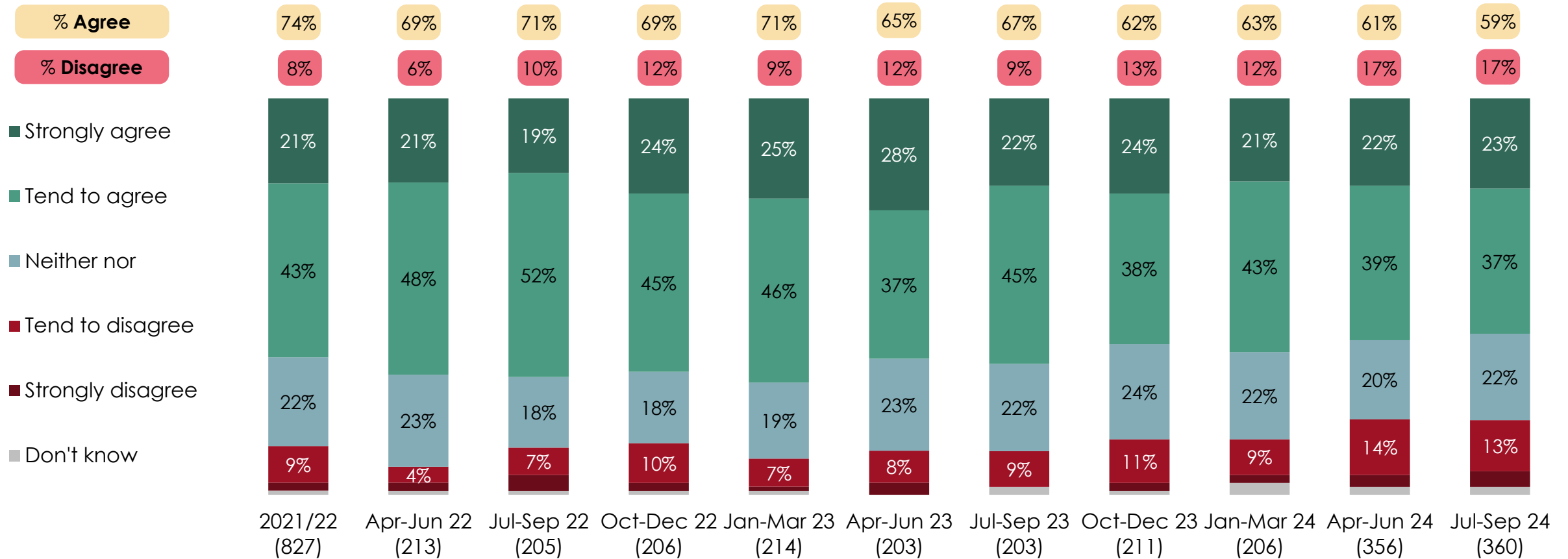
I worry about being able to afford my water bill



The proportion of bill payers that actively disagree that the water/sewerage charges are affordable is on par with the previous Quarter.



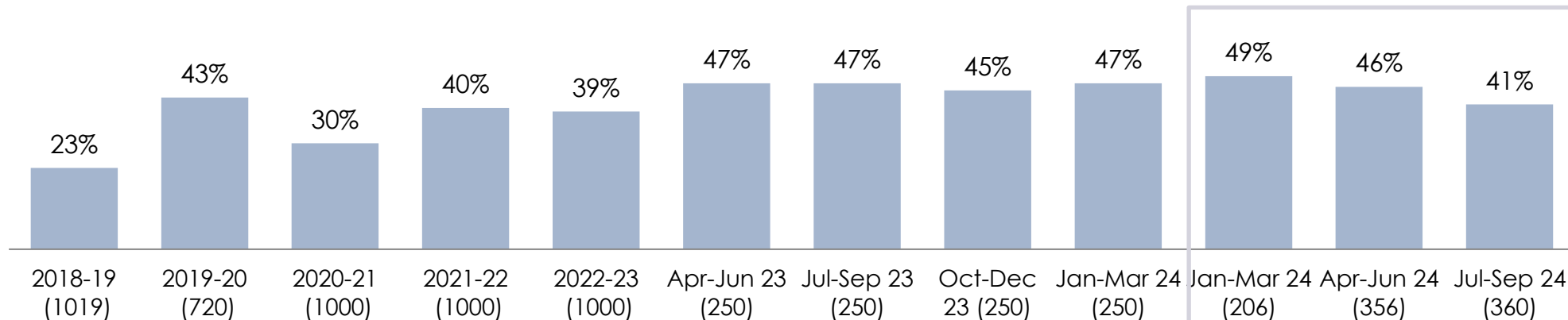
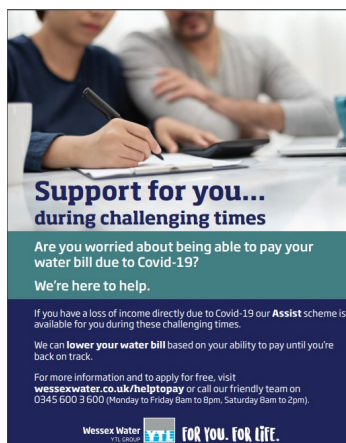
Q17. How much do you agree or disagree: "The total water and sewerage charges that you pay are affordable to you"? Base: All bill payers



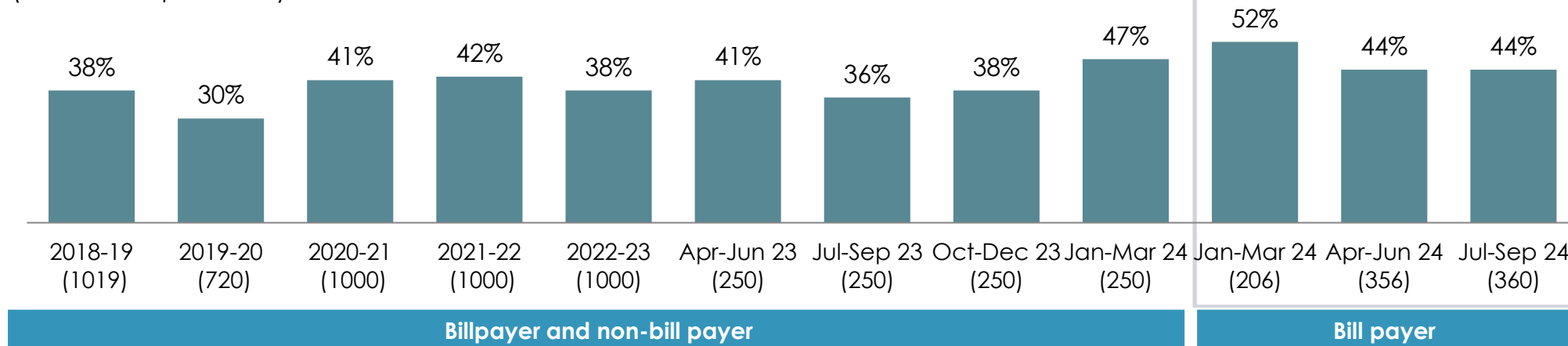
Awareness of Assistance Measures

The proportion of customers that is aware of PSR services declines again, but awareness of financial assistance stabilises.

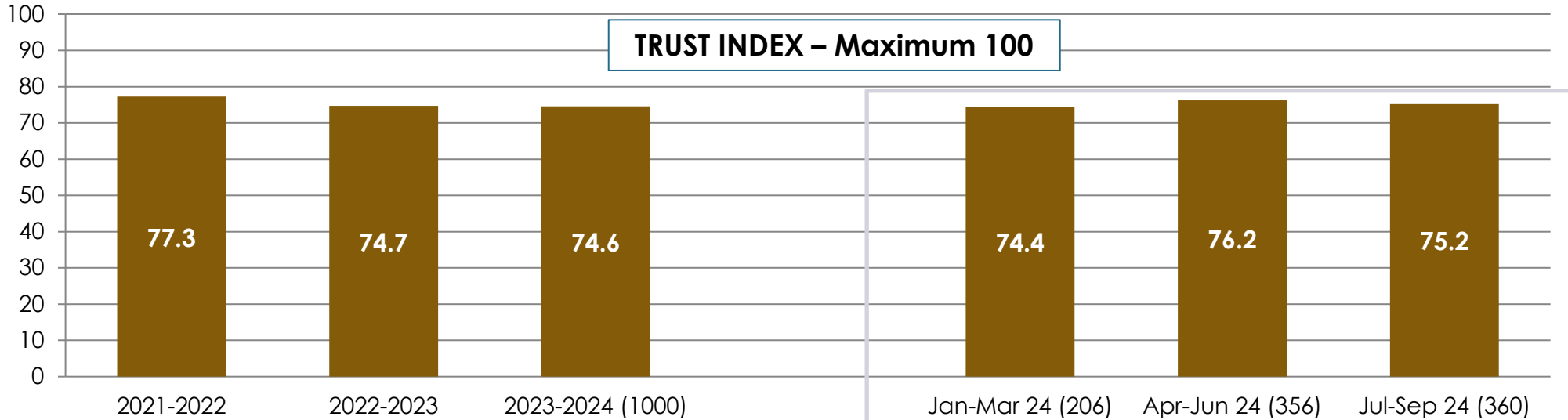
Q20r1: Are you aware of Wessex Water doing any of the following? - **Assisting customers who struggle to afford their water bill** (Base: All respondents)



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)



The Trust index holds steady for this Quarter. Many metrics within the Trust index have risen over time, however, there is a decline in mean score for 'Customer Ethos', which is related to perceptions of Wessex Water caring about its constituents and being easy to deal with and 'Ethics'.



Components - Mean scores

Component	2021-2022	2022-2023	2023-2024 (1000)
Reliability and dependability	8.20	8.05	8.18
Competence and capability	7.68	7.39	7.23
Customer ethos	7.64	7.40	7.34
Transparency	7.78	7.62	7.73
Ethics	7.44	7.16	6.93
Brand validation	7.42	6.98	6.97

Component	Jan-Mar 24 (206)	Apr-Jun 24 (356)	Jul-Sep 24 (360)
Reliability and dependability	8.20	8.30	8.33
Competence and capability	7.21	7.44	7.56
Customer ethos	7.36	7.63	7.41
Transparency	7.73	7.73	7.79
Ethics	6.76	7.08	6.93
Brand validation	6.93	7.06	7.13

Billpayer and non-bill payer

Bill payer

Knowledge and sentiment



Knowledge

The proportion of customers who feel knowledgeable about Wessex Water is in line with previous Quarters.

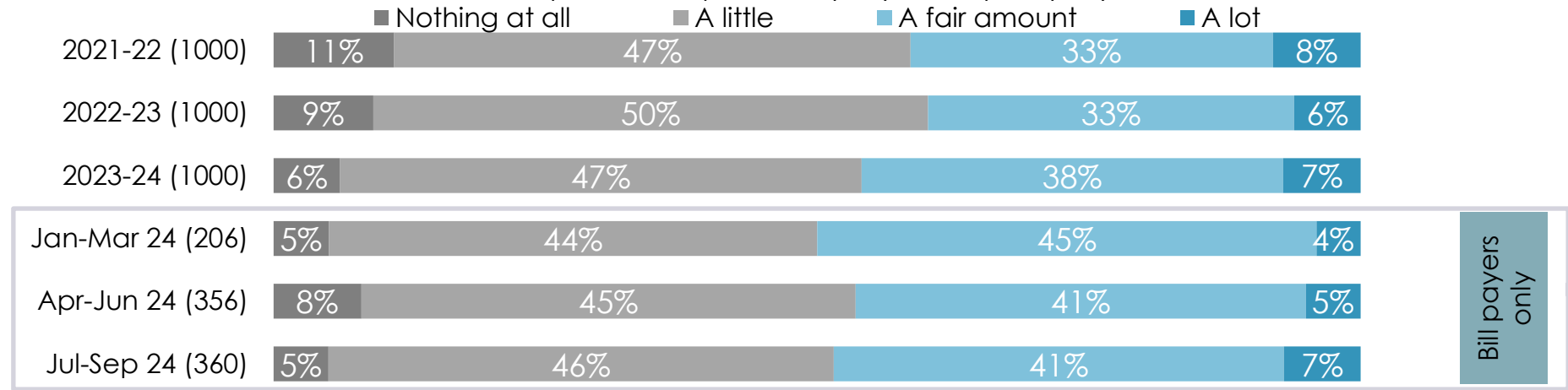


Sentiment

The proportion of customers who feel positive about Wessex Water holds steady (a small decline from the peak in Q1 24/25)

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

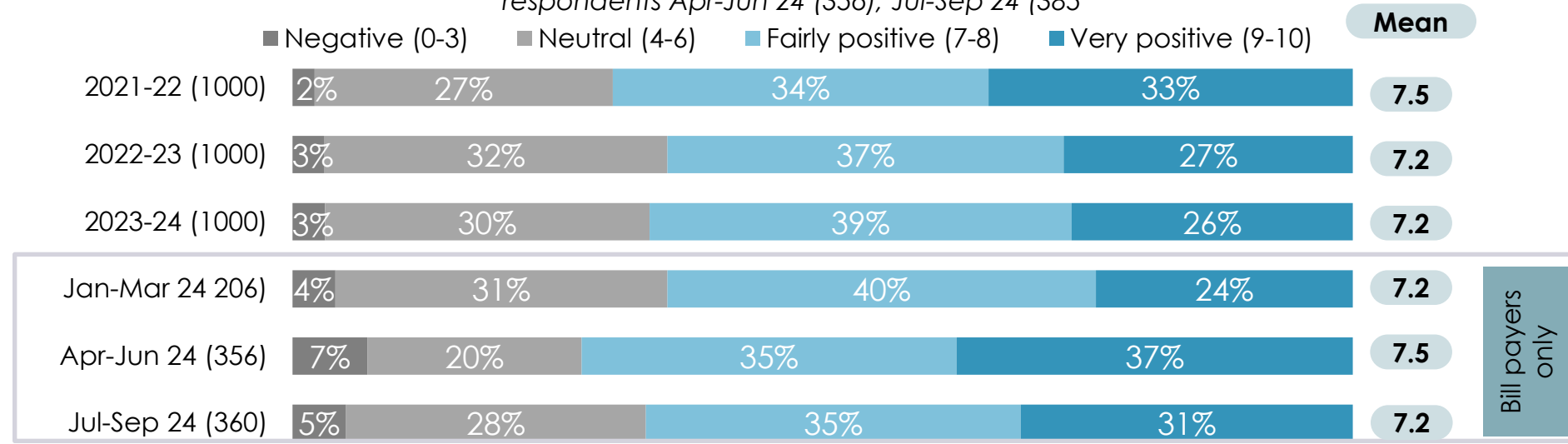
Base: All respondents 2021/22 (1000), 2022/23 (1000), 2023/24 (1000, Bill payers Jan-Mar 24 (206), All respondents Apr-Jun 24 (356), Jul-Sep 24 (385)



Bill payers only

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

Base: All respondents 2021/22 (1000), 2022/23 (1000), 2023/24 (1000, Bill payers Jan-Mar 24 (206), All respondents Apr-Jun 24 (356), Jul-Sep 24 (385)



Bill payers only

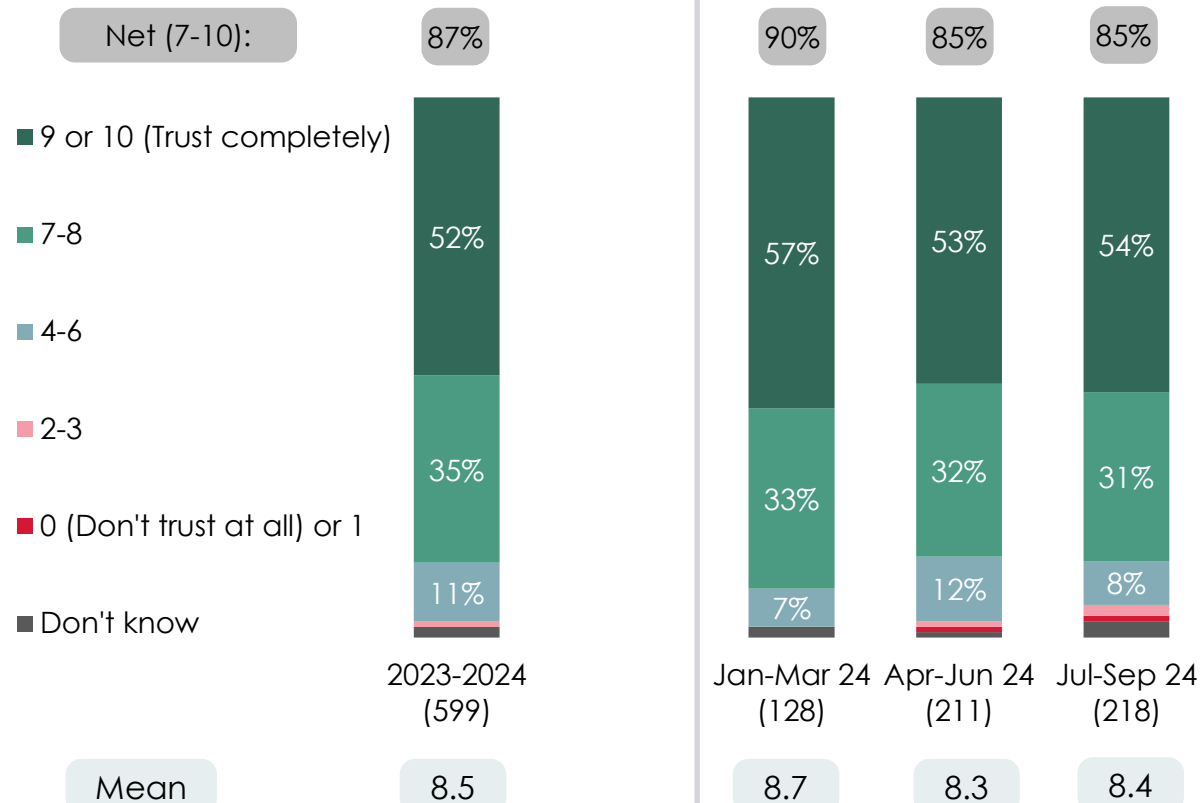
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)

Trust in Wessex Water's capacity to provide a reliable supply of good quality tap water holds steady, but trust in the company being able to deal with wastewater and sewage continues to decline (a significant decline from Q4 23/24).



QT1 How much do you trust Wessex Water to provide a reliable supply of good quality tap water?

Base: All respondents in supply area



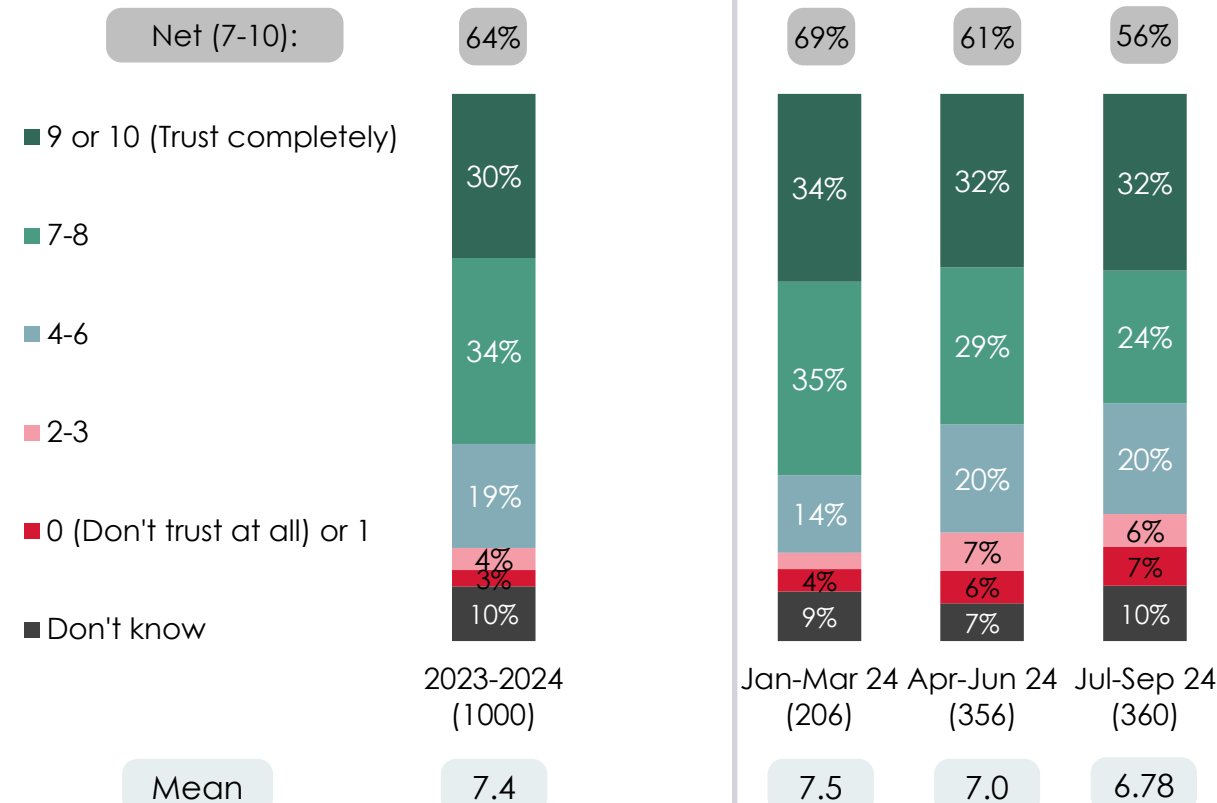
Billpayer and non-bill payer

Bill payer



QT2 How much do you trust Wessex Water to take away wastewater and sewage and deal with it responsibly?

Base: All respondents



Billpayer and non-bill payer

Bill payer



Brand health and image

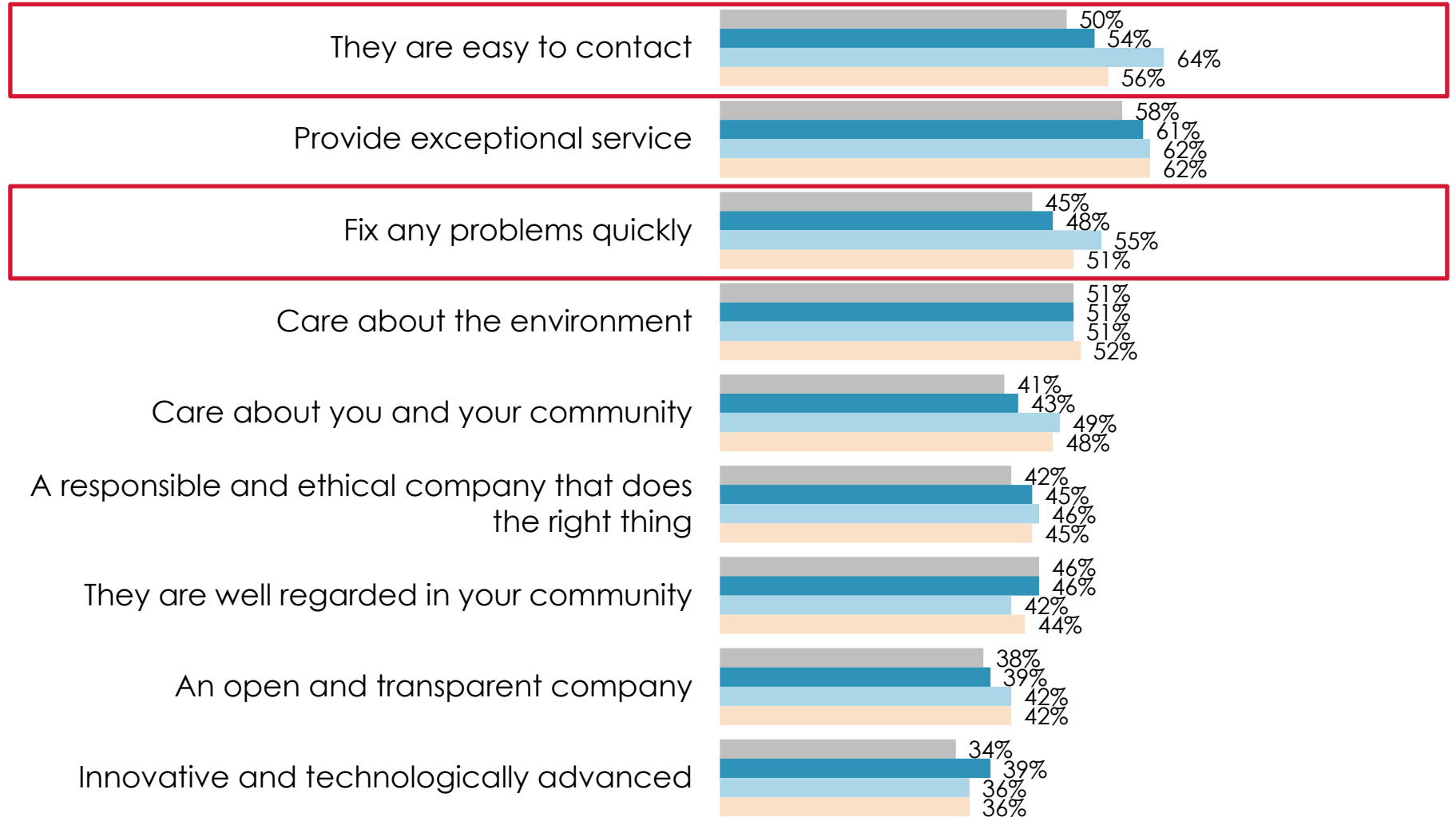


Imagery

Brand imagery remains steady overall, with the proportion of customers agreeing that Wessex Water 'cares for them and their community' holding firm.

However, there is a slight drop in those who believe the company can 'fix problems quickly,' and a significant decline in 'ease of contact,' both of which peaked in Q1 24/25, which is driving the decline in 'customer ethos'.

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').



■ 2023/24 Total (1000) ■ Jan-Mar 24 billpayers (206) ■ Apr-Jun 24 bill payers (356) ■ Jun-Sep 24 bill payers (360)

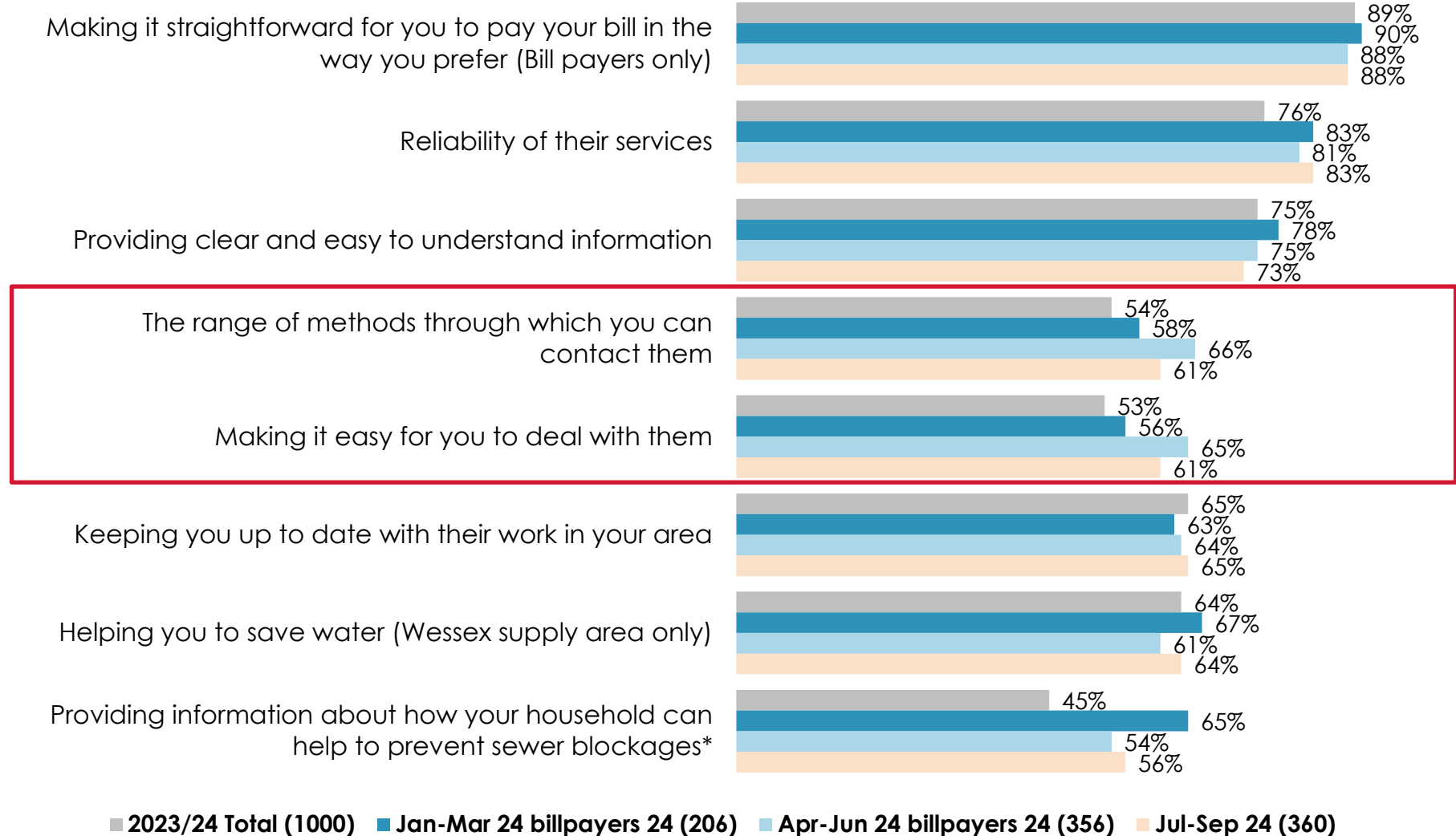
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)



There's a decline in the proportion of customers who feel that Wessex Water makes it 'easy for customers to deal with them' and performance regarding the range of methods of contact since the previous Quarter, but still higher than Q4 23/24.

Other performance metrics hold relatively steady to the previous Quarter.

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



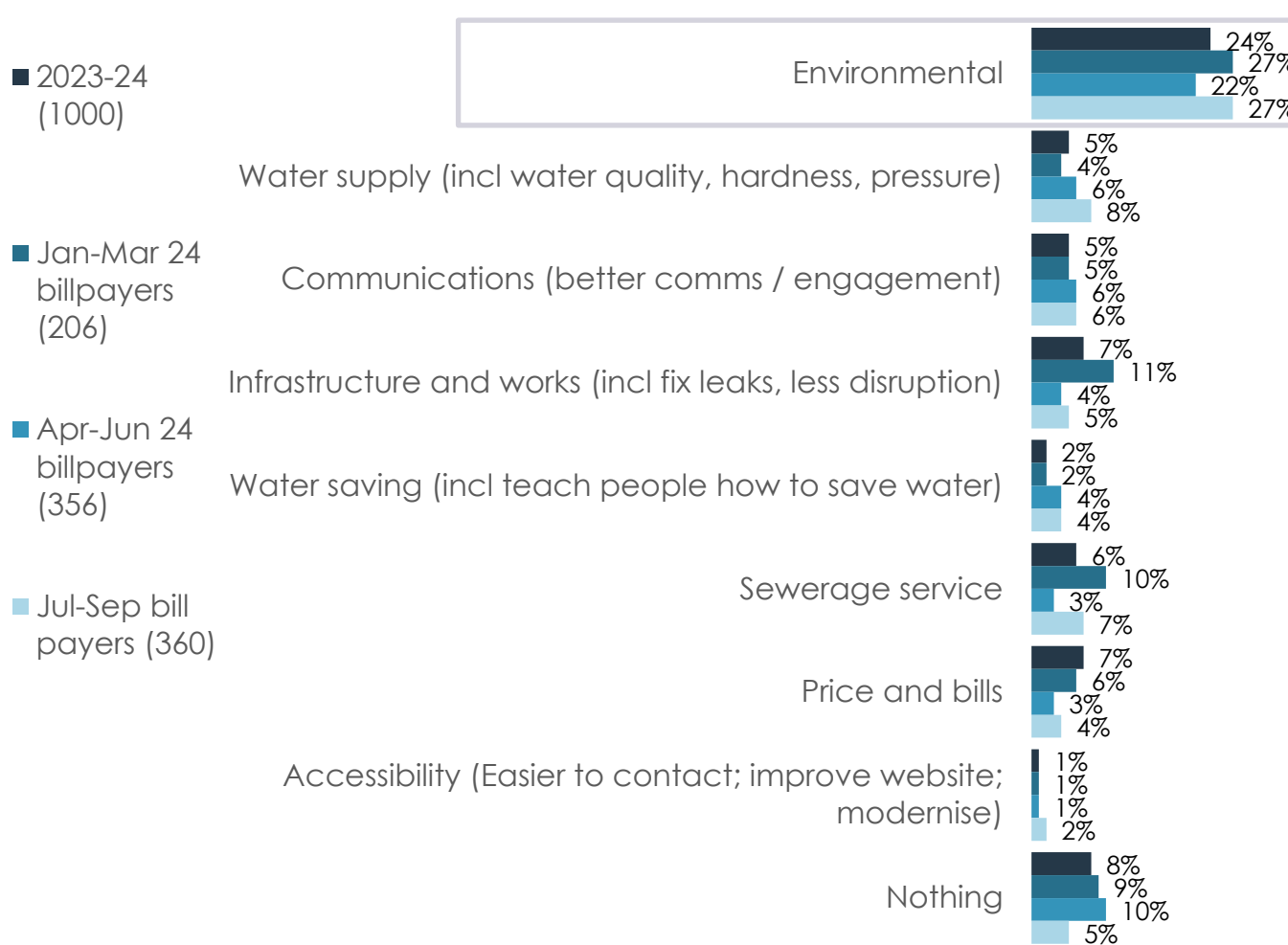
*Question wording changed in Q3 2023-24 from "Helping you prevent sewage blockages in your household"
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)

Looking ahead, what can be improved?

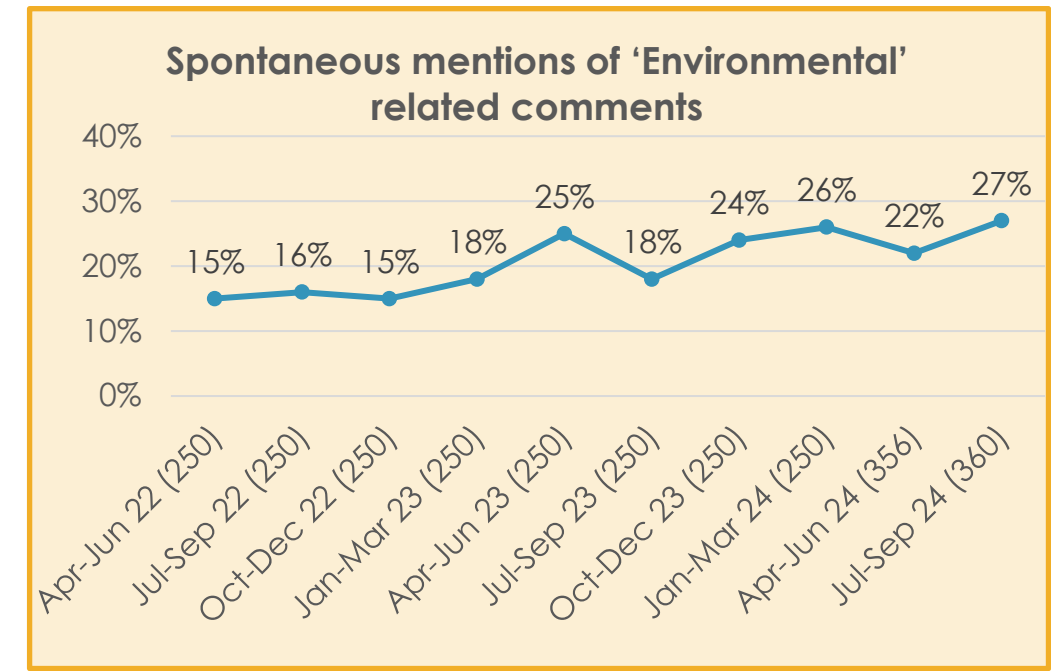
Compared to Q1-24, there is an increase the proportion of customers who mentioned environmental issues as an area of focus for Wessex Water. The more pessimistic financial outlook, meanwhile, does not (yet) translate into an increase in spontaneous mentions of needing to address price and bills.

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	6%
Should be less sewage in rivers/sea	7%



Recall of touchpoints

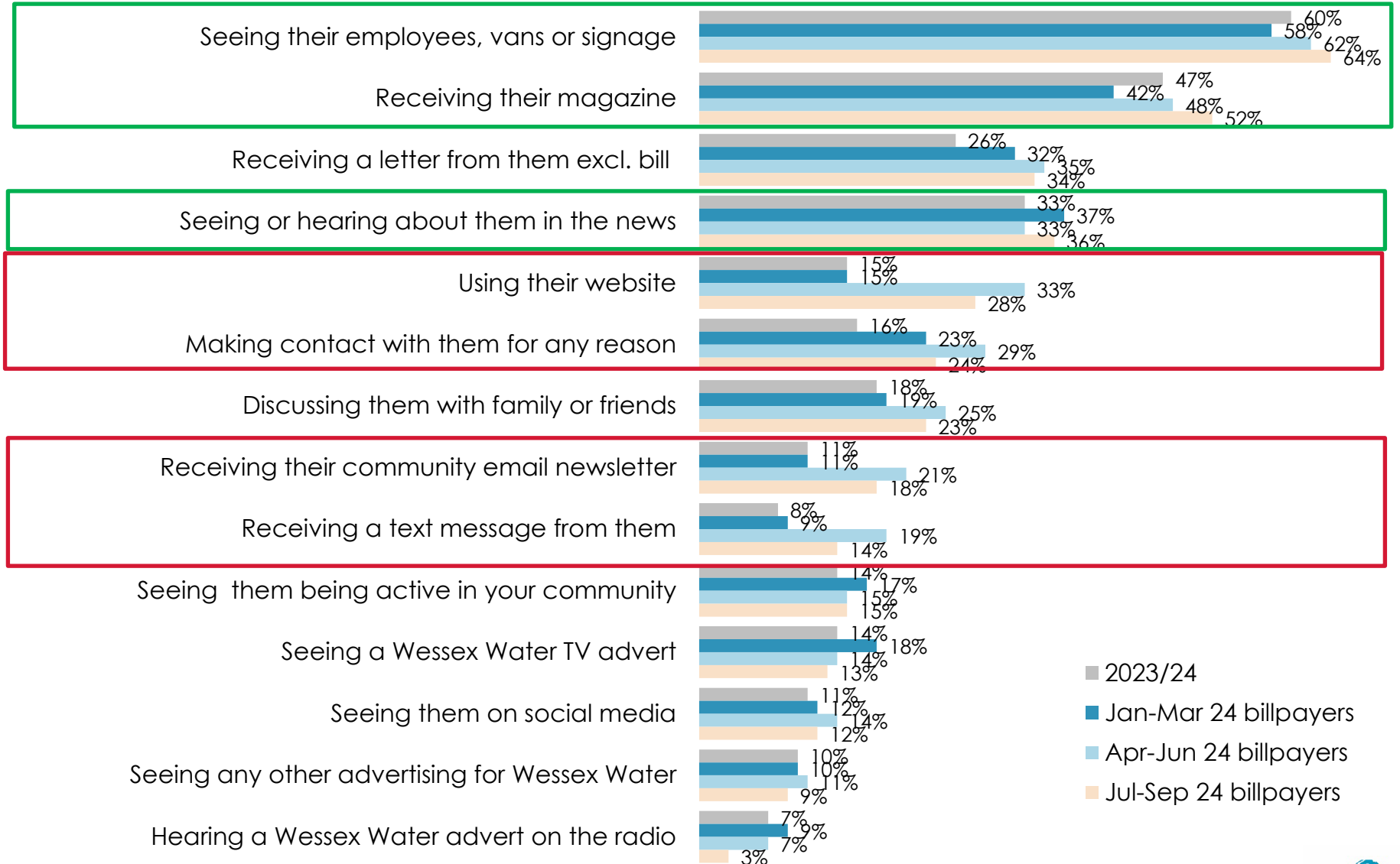


A greater proportion of customers have seen Wessex Water via employees, signage and vans and the magazine .

The proportion of people who have made contact with Wessex Water or using their website, or received their community email newsletter and text messages drops back slightly from the peak in Q1 24/25.

Q23: Thinking about Wessex Water, in the last six months do you recall...?

Base: All respondents 2023/24 (1000), Jan-Mar 24 bill payers (206) Apr-Jun 24 bill payers(356) Jul-Sep bill payers (360)



New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)



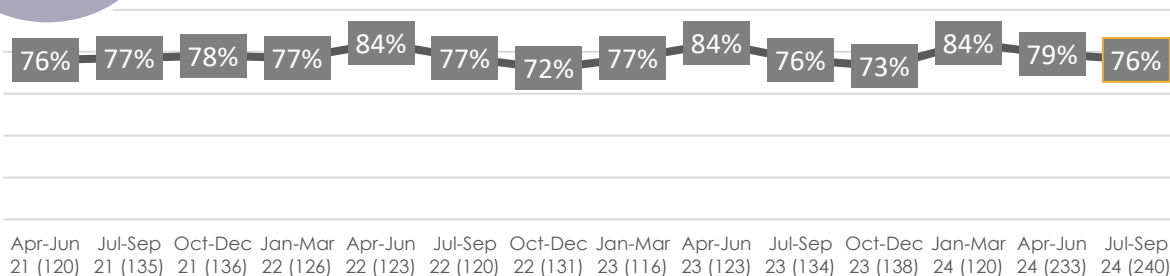
Water use behaviours

Attitudes to water use and metering

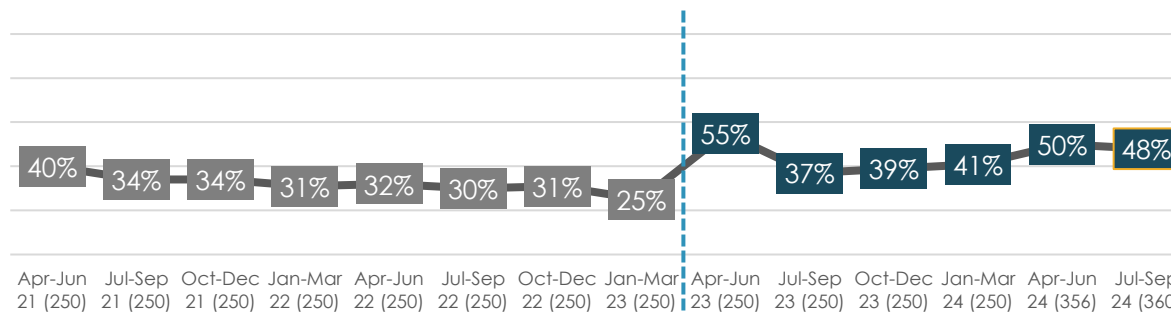
Attitudes to water use and metering hold steady. The proportion of customers who were not sure how they could reduce their water use shows a decline since the previous wave (albeit not significantly so).

Water use and Metering

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

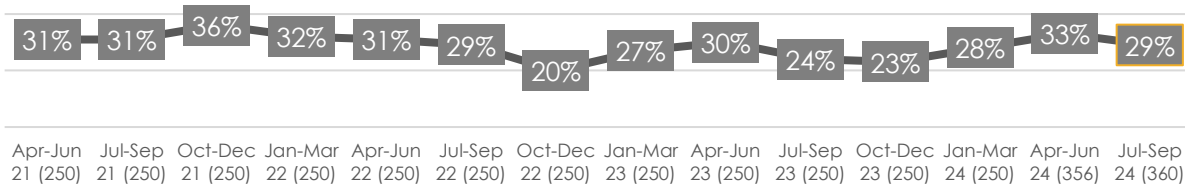


I manage my water use to keep the water bill down*



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

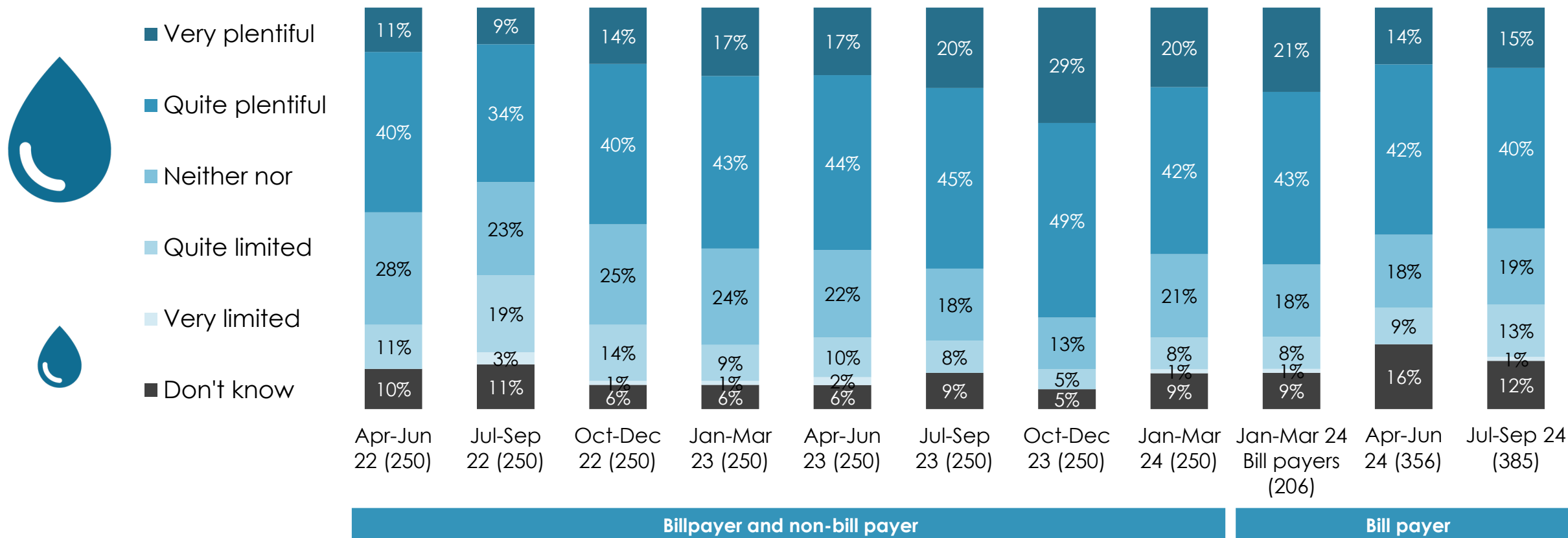
*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter" New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)

Impressions of water resources in region

No real changes in impressions of water resources in the region, bar a slight decrease in the proportion that feels that water resources are limited.

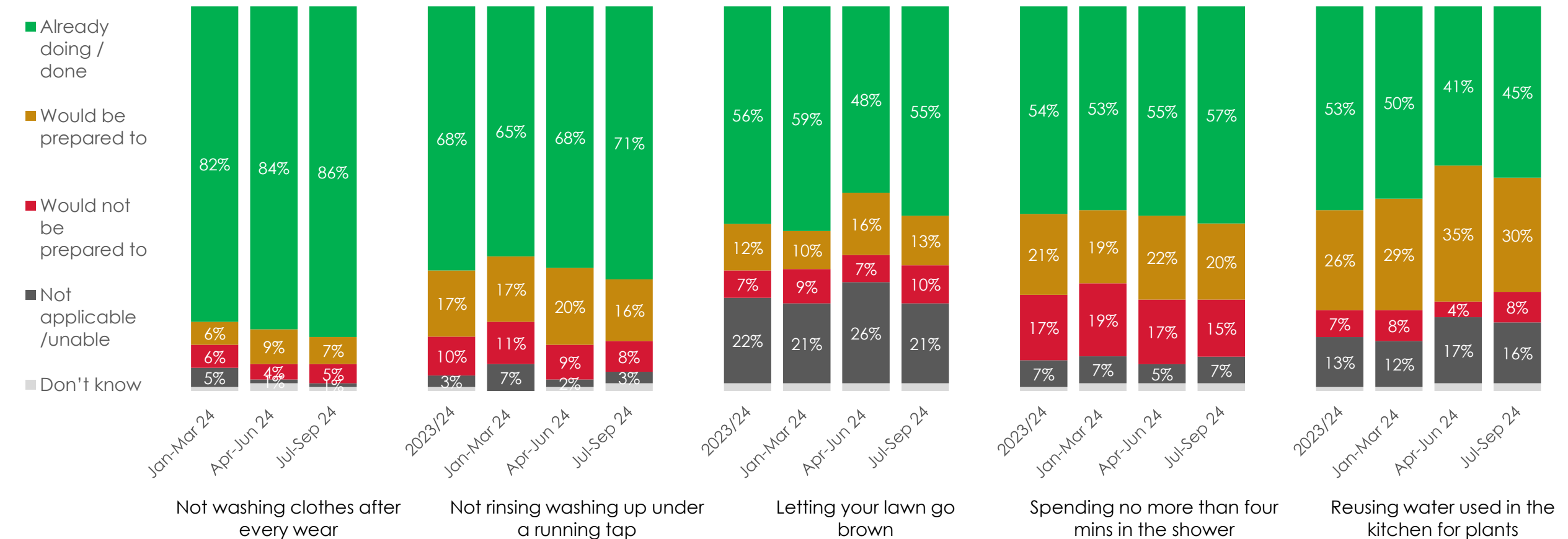
QF2b. The water supplied to homes and businesses comes from rainwater that ends up in rivers, reservoirs and natural underground stores. How plentiful or limited do you think these sources of water are in your region?

Base: All respondents



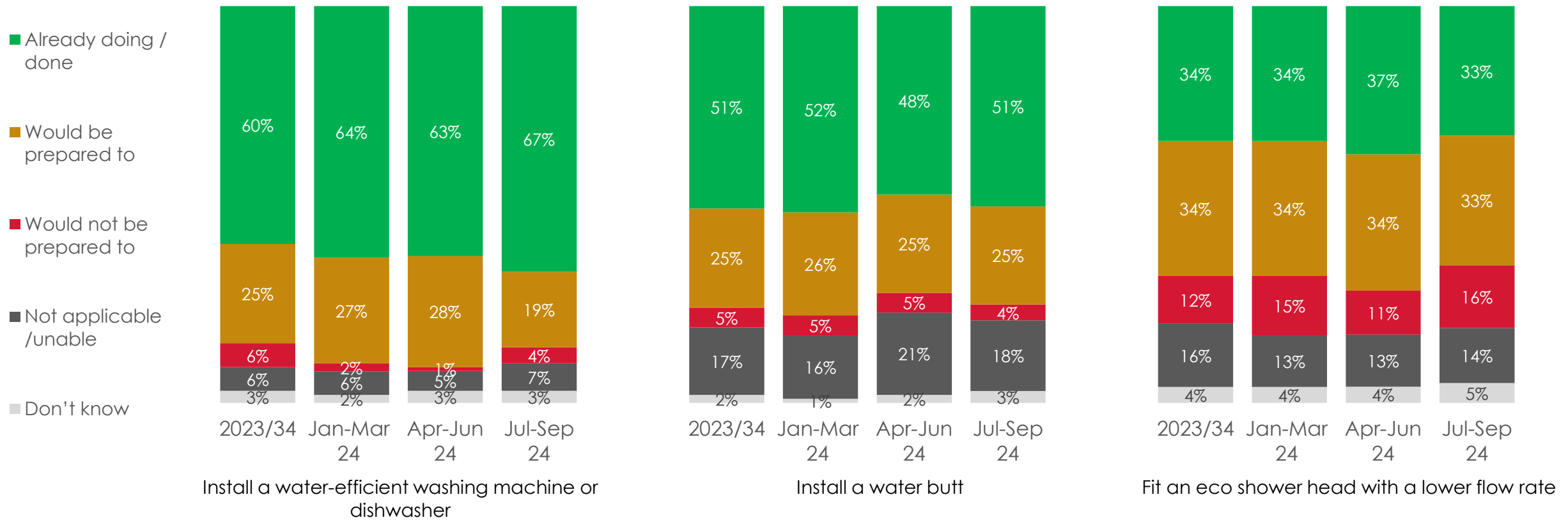
No major shifts in customers' water use behaviours, though there appears to be a growing trend in not rinsing washing up under a running tap.

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: 2023/24 Total (1000) Jan-Mar 2024 bill payers (206), Apr-Jun 2024 bill payers (356) Jul-Sep 2024 bill payers (360)



And no notable shifts either in action around water use, though a greater proportion of customer say they have installed water efficient appliances.

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 (1000), Bill payers Jan-Mar 2024 (206), Bill payers Apr-Jun 2024 (356) Bill payers Jul-Sep 2024 (360)*





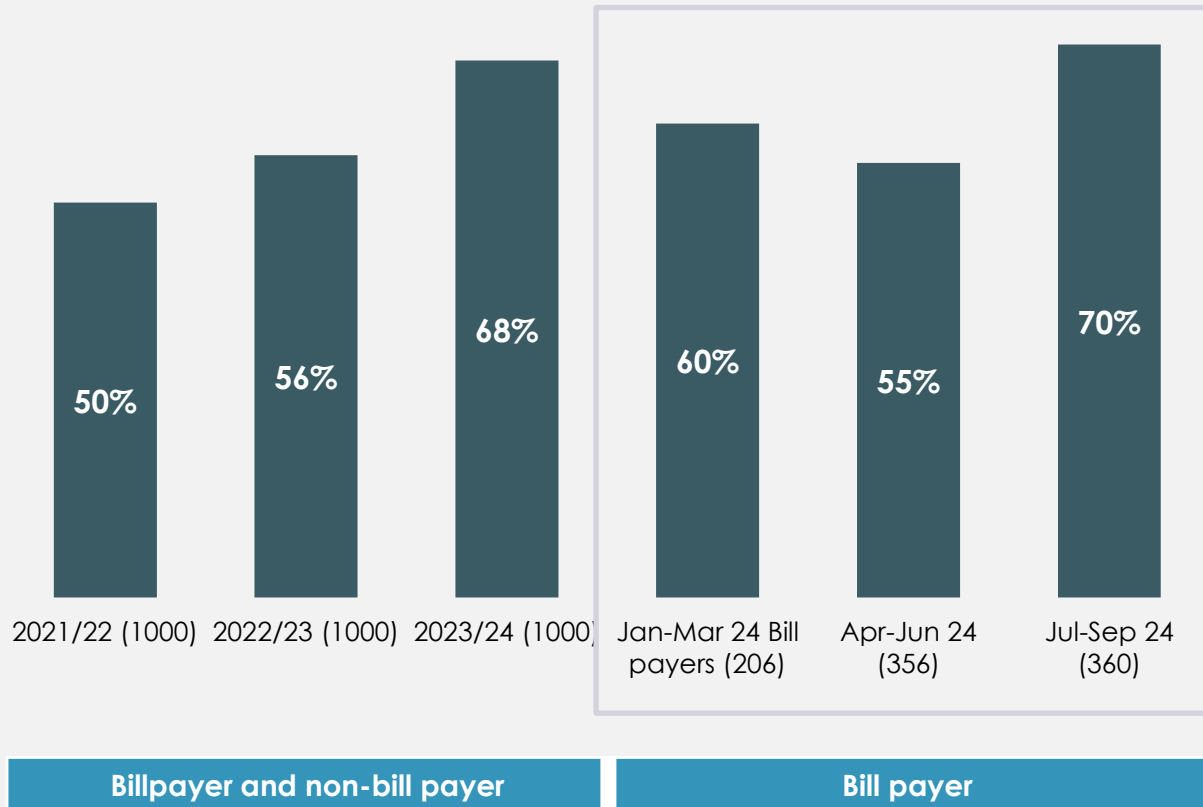
Storm overflows



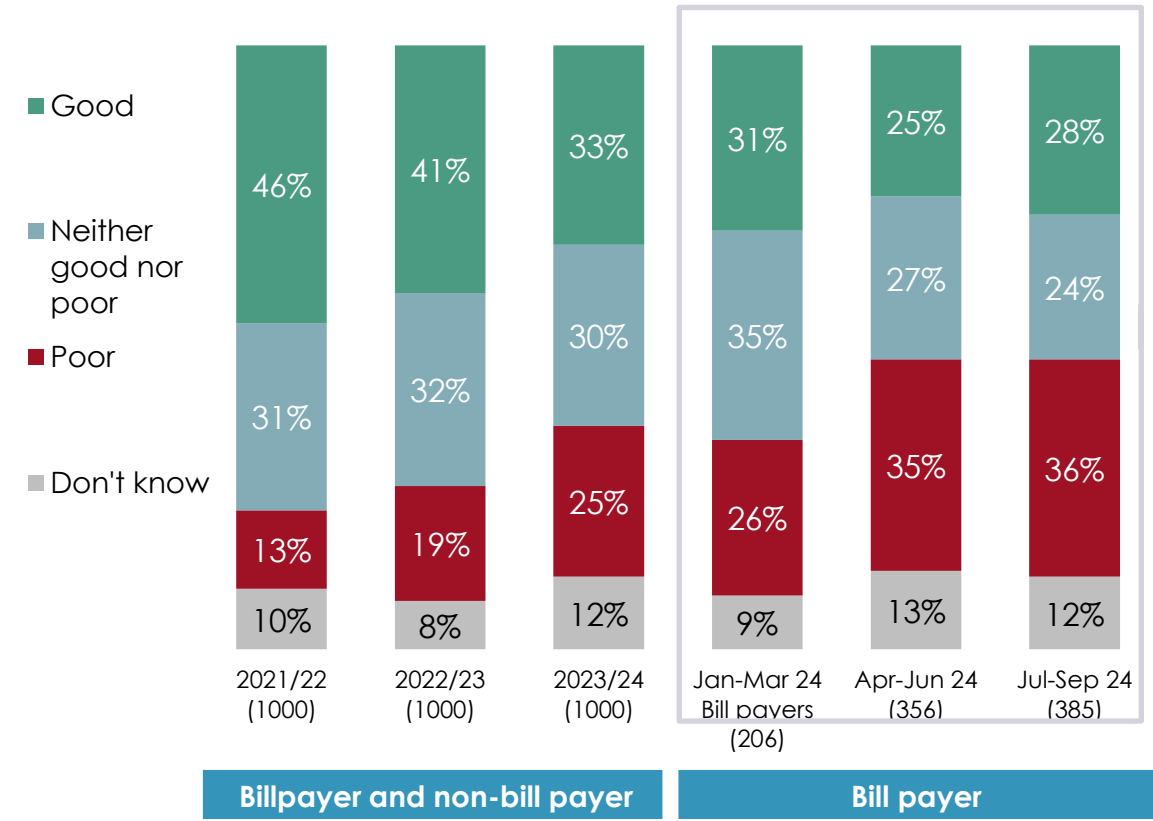
There is an increase in the proportion of customers aware of storm overflows compared to the previous Quarter. Despite this spike in awareness, impressions of water quality in the region hold steady.

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

Base: All respondents

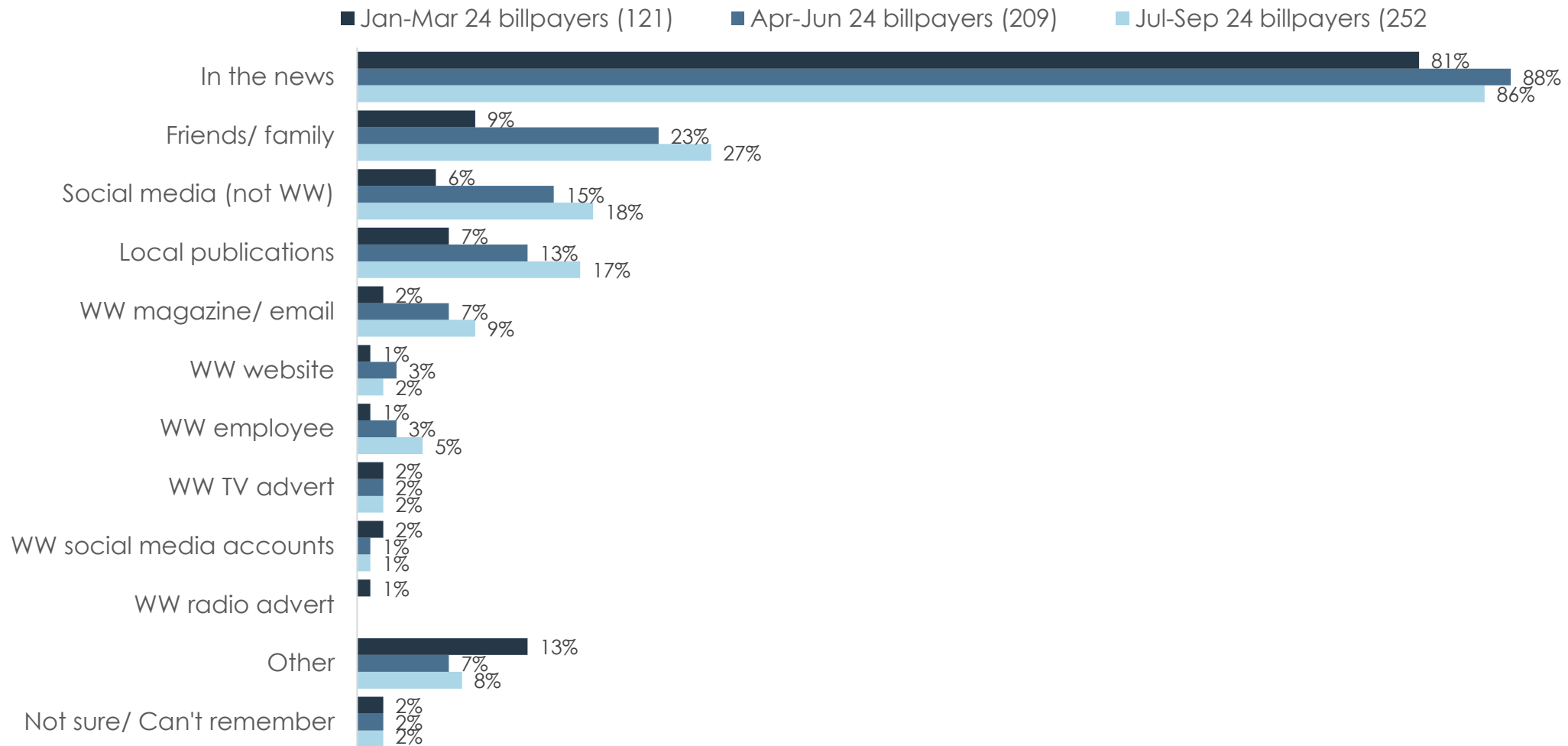


QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality? Base: All respondents



No change in main source of awareness of storm overflows since the previous Quarter with most customers hearing about it in the news.

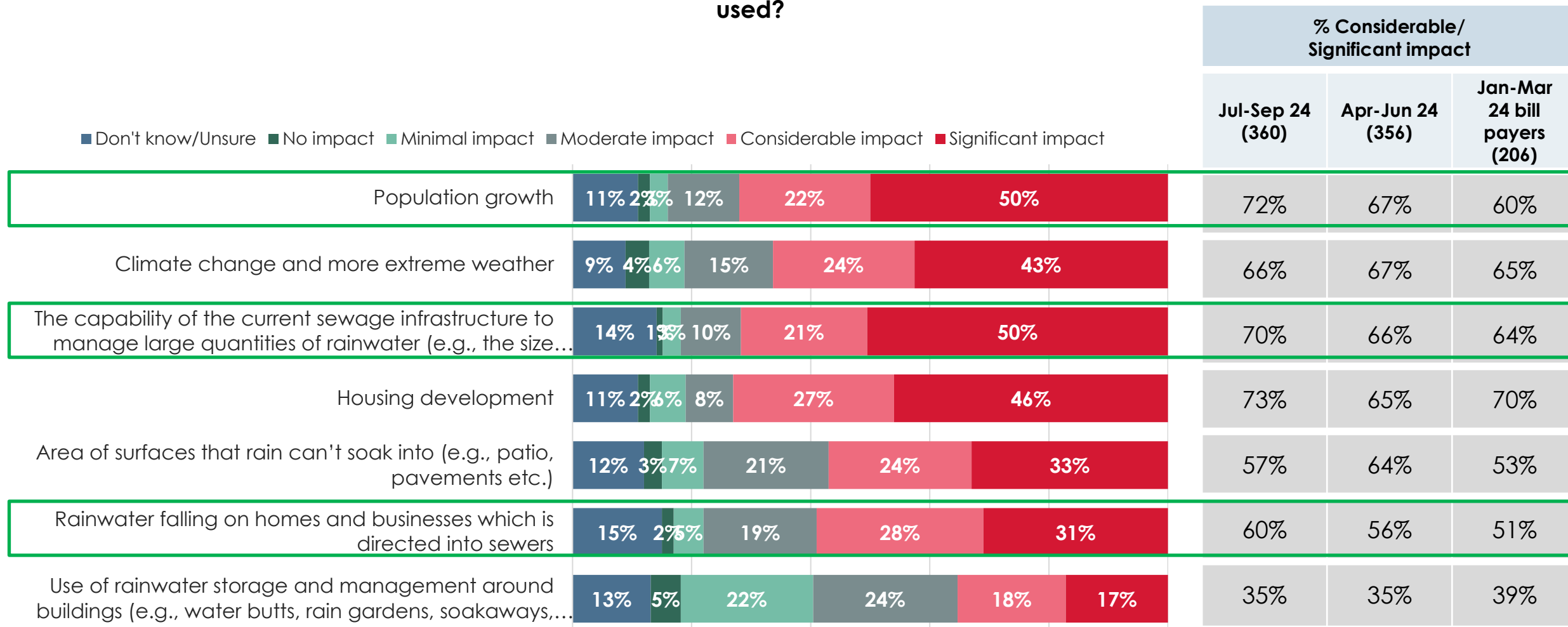
QF1e And where did you hear about this topic?



Impact of factors on storm overflow operations

There is a growing perception among Wessex Water customers that population growth, the sewage infrastructure and rainwater falling on homes into sewers pose a significant impact on the reliance of storm overflows.

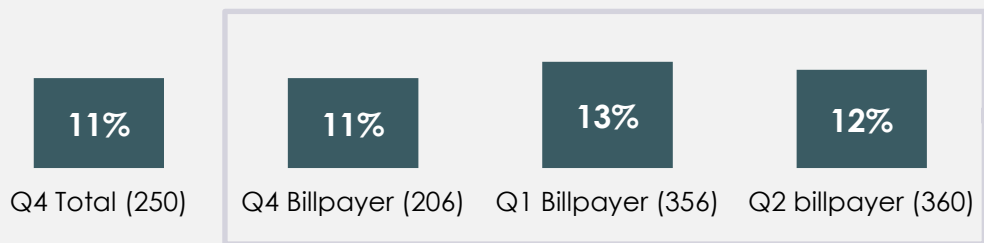
QF1dNEW - What impact, if any, do you think the following factors have on how often storm overflows are used?



Awareness of Wessex Water activity to reduce storm overflows

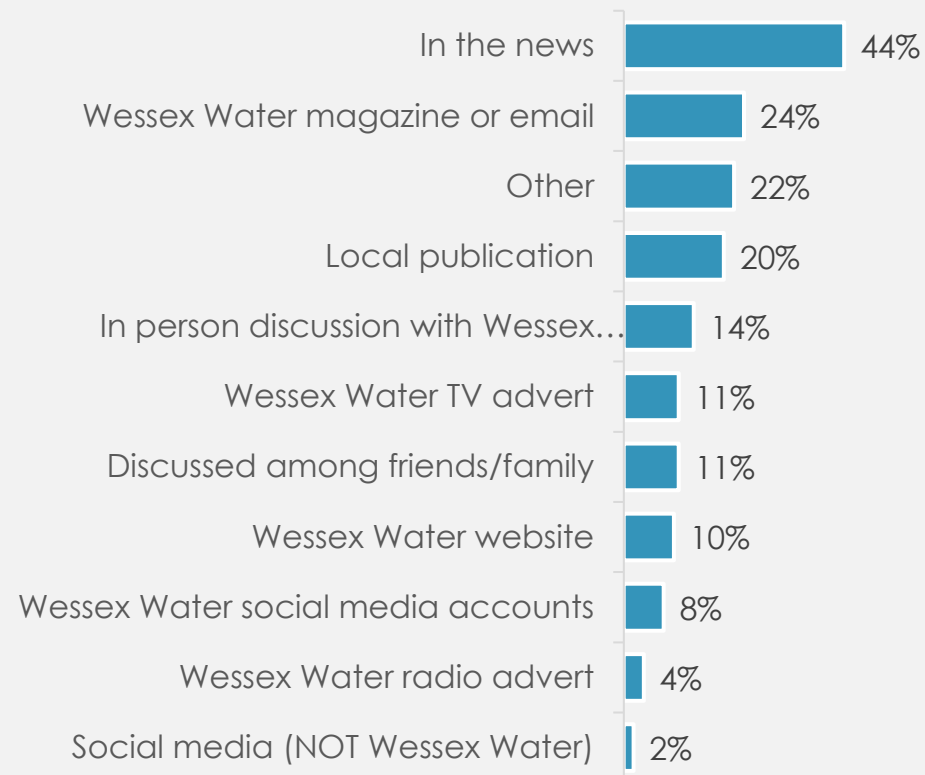
Awareness of Wessex Water’s efforts to reduce storm overflows has remained consistent, with the news and Wessex Water’s own communications (i.e. their magazines/emails) being the most frequently cited sources of information.

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? (Number of mentions)

Base: All aware of Wessex Water activity to reduce CSOs (46)



Note: Due to the small sample size, insight should be considered directional



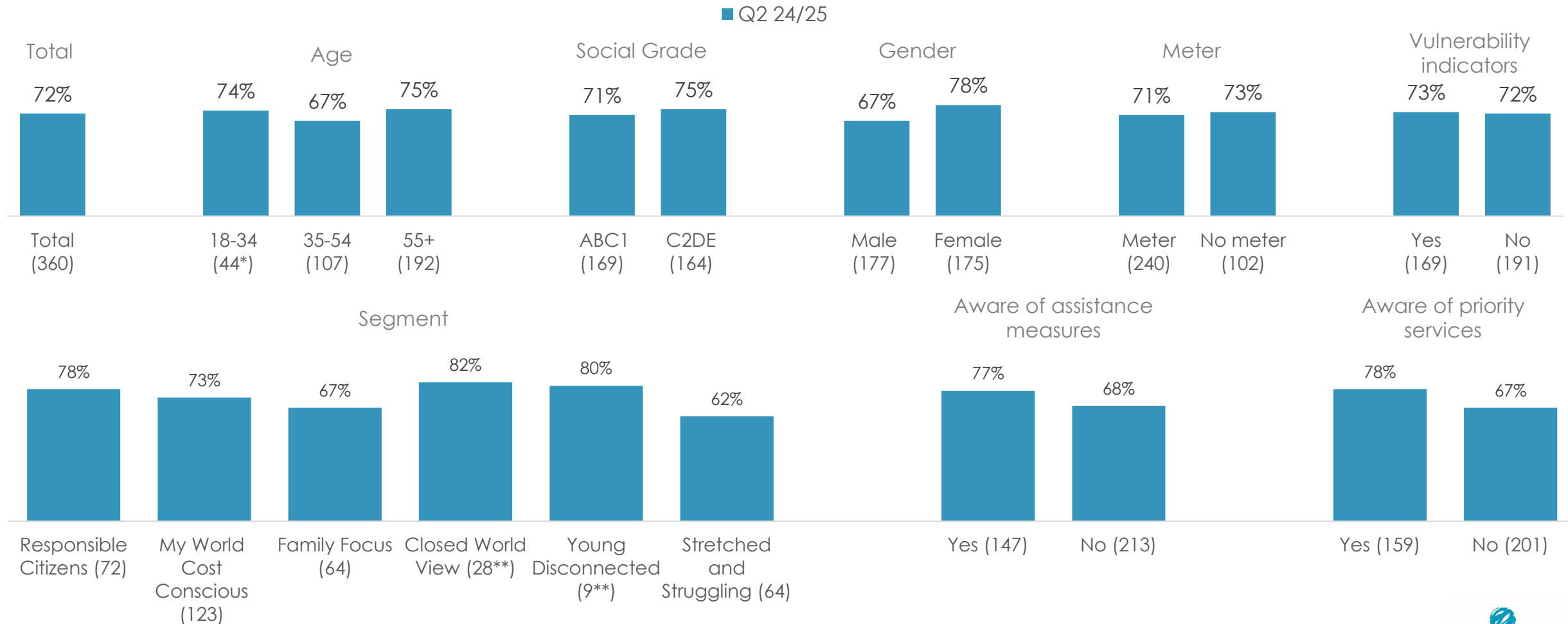
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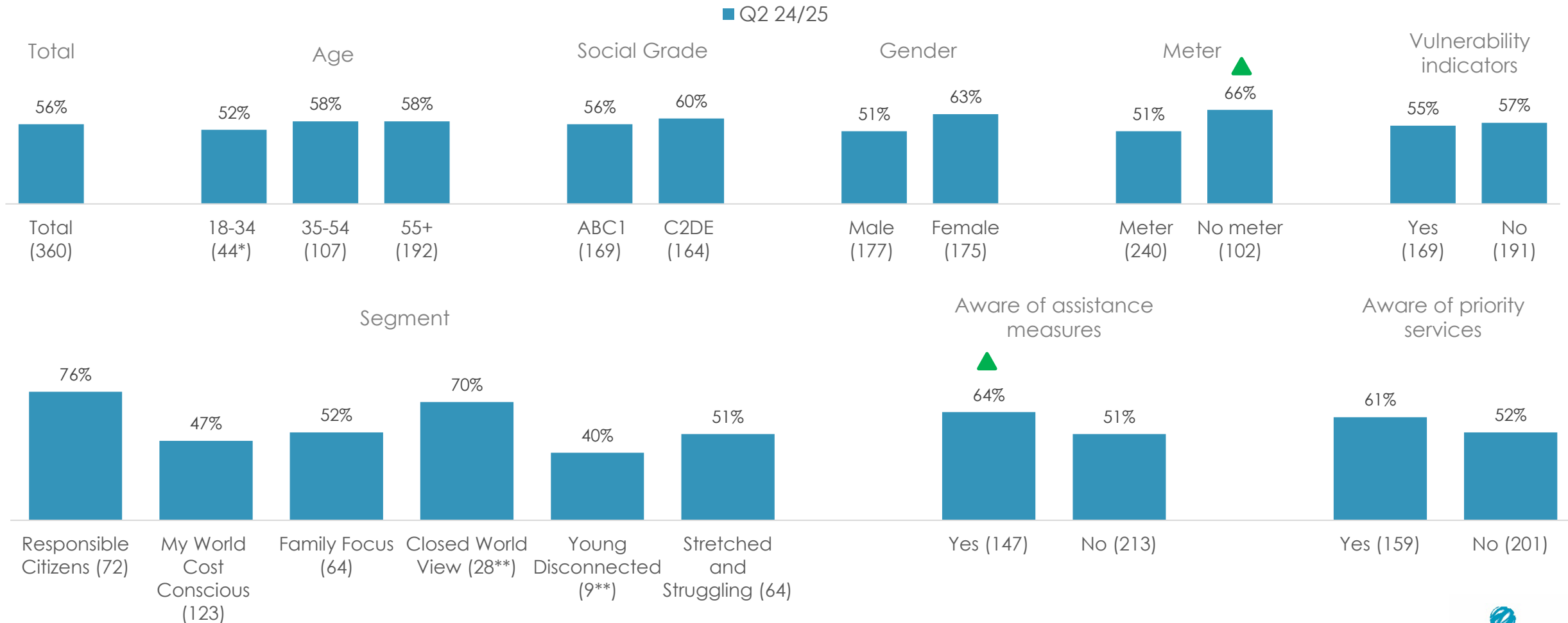
Satisfaction with Wessex Water remains consistent across the subgroups – slightly lower amongst those not aware of financial assistance and PSR, but not significantly so.

Q11. Taking everything into account how satisfied are you with Wessex Water? (% Rate 7-10)



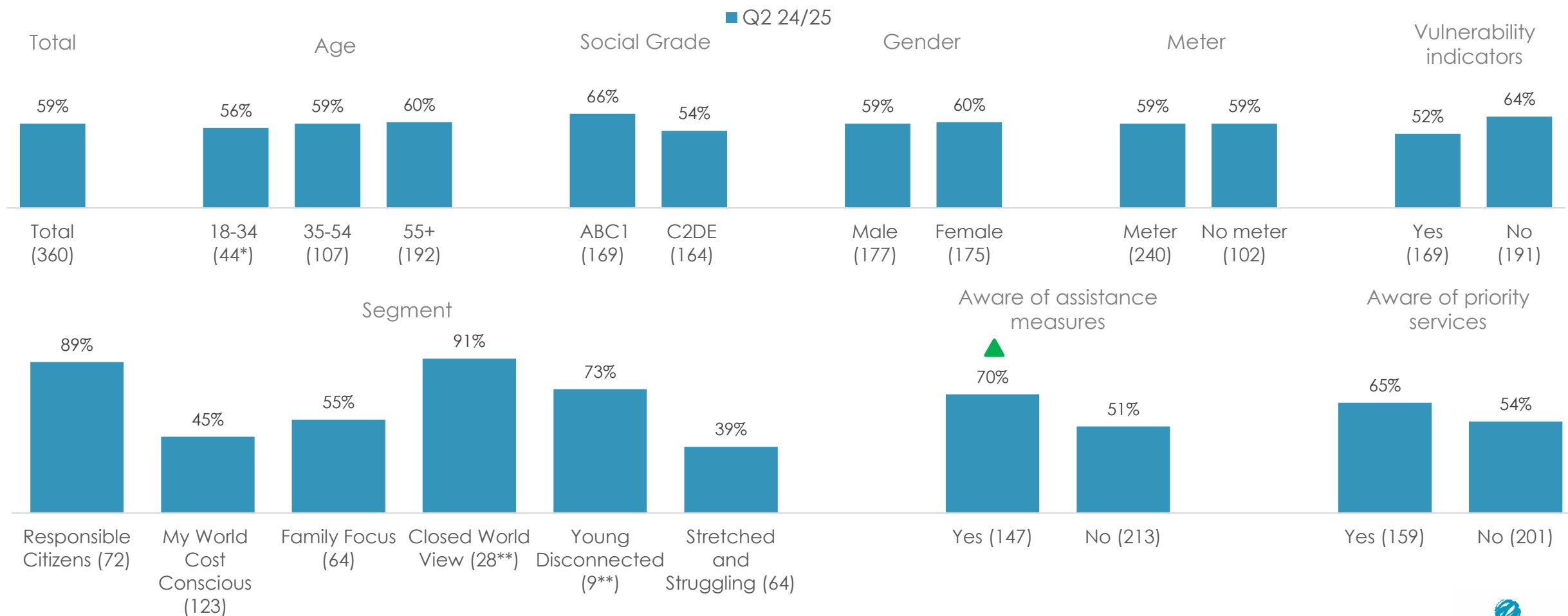
Customer without a meter and those aware of assistance measures are significantly more likely to be satisfied than their counterparts, but otherwise fairly stable across key subgroups.

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)



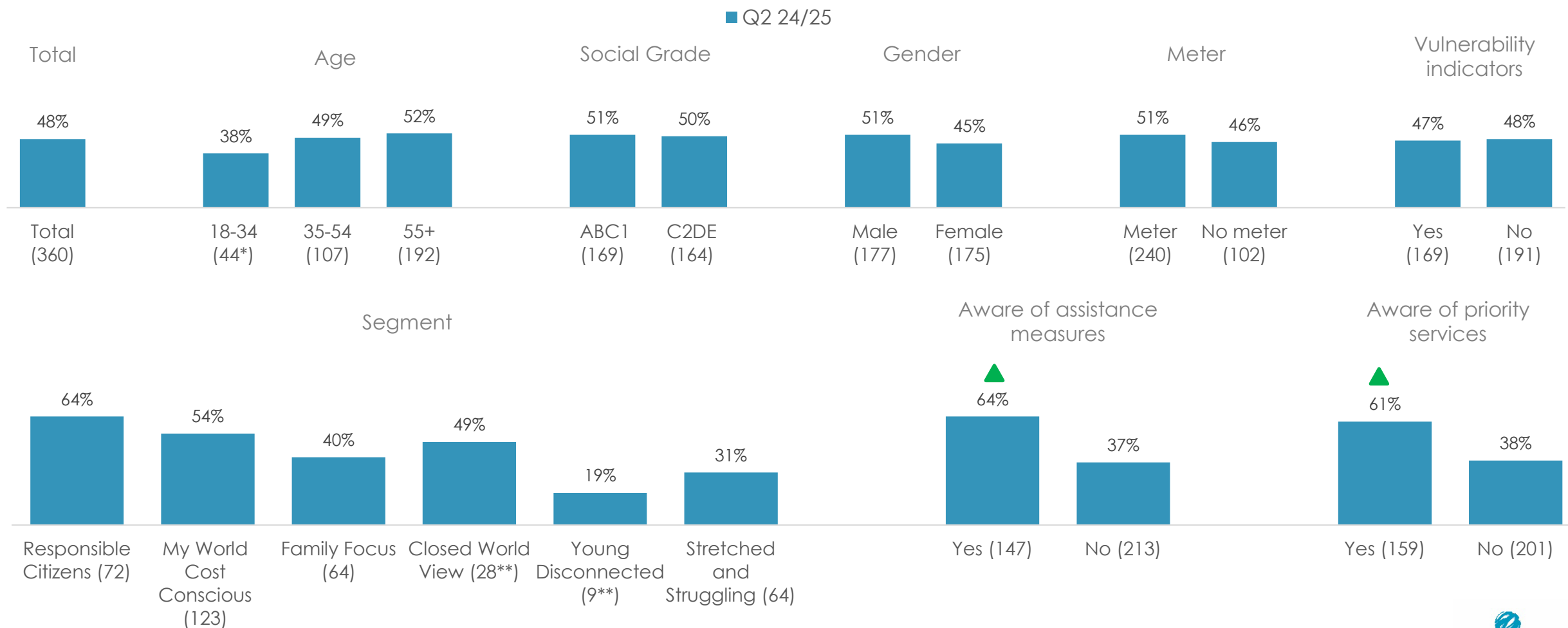
Customers aware of assistance measures are significantly more likely to agree that their water and sewerage charges are affordable, compared to those who are unaware. Additionally, Responsible Citizens and Closed World View customers are more likely to agree than other segments.

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)



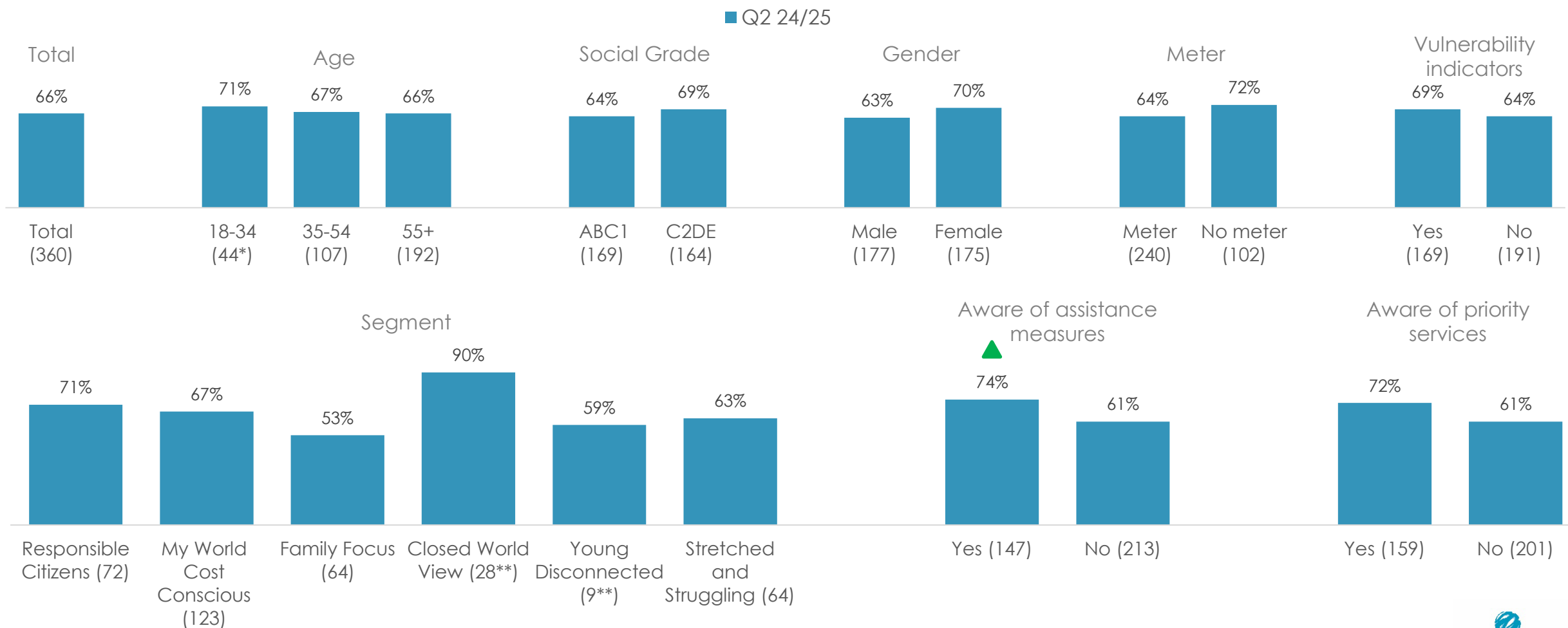
Customers aware of assistance measures and priority services are significantly more likely to say they know a fair amount / a lot about Wessex Water, compared to customers who are unaware.

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)



Positive sentiment towards Wessex Water is relatively consistent among groups, but customers aware of assistance measures are significantly more likely to feel positively about Wessex Water. Closed World View customers have higher levels of positive sentiment than other segments.

Q4. Now thinking about Wessex Water. Please tell how do you feel about them overall? (% Positive)

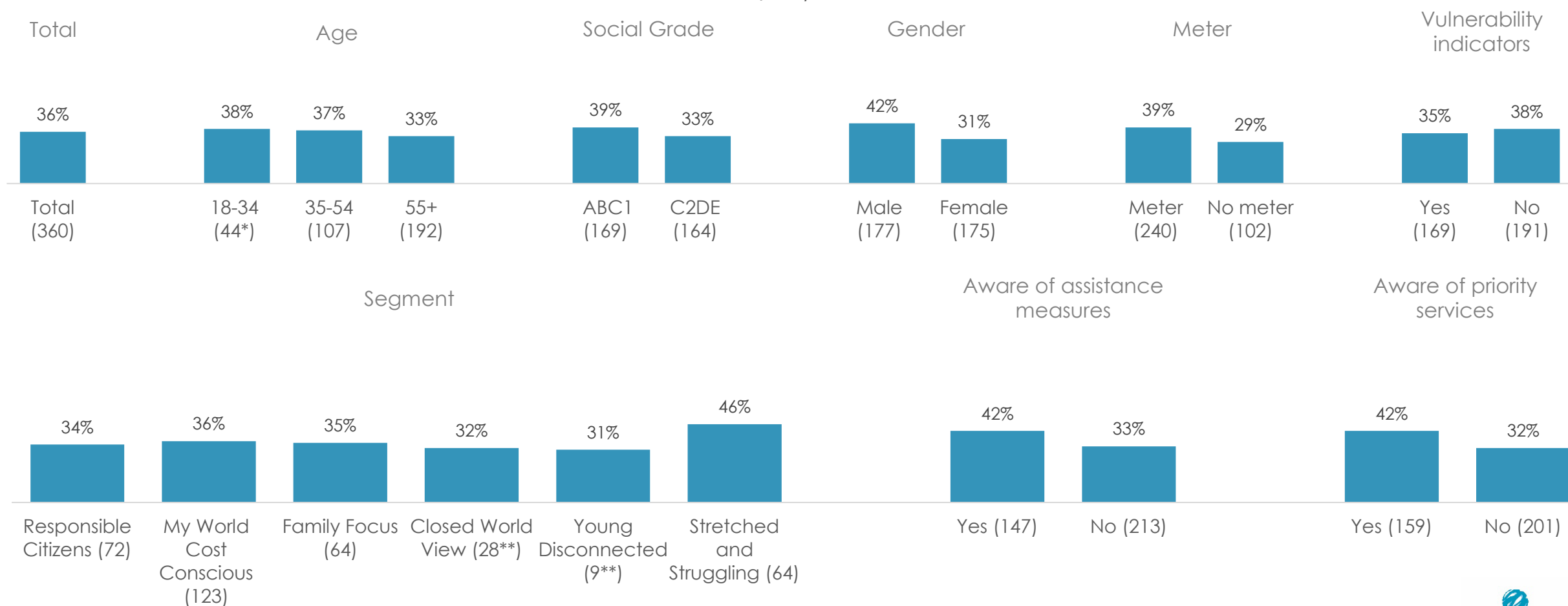


Views on the water quality in rivers or the sea are relatively consistent across subgroups, with no significant differences.

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

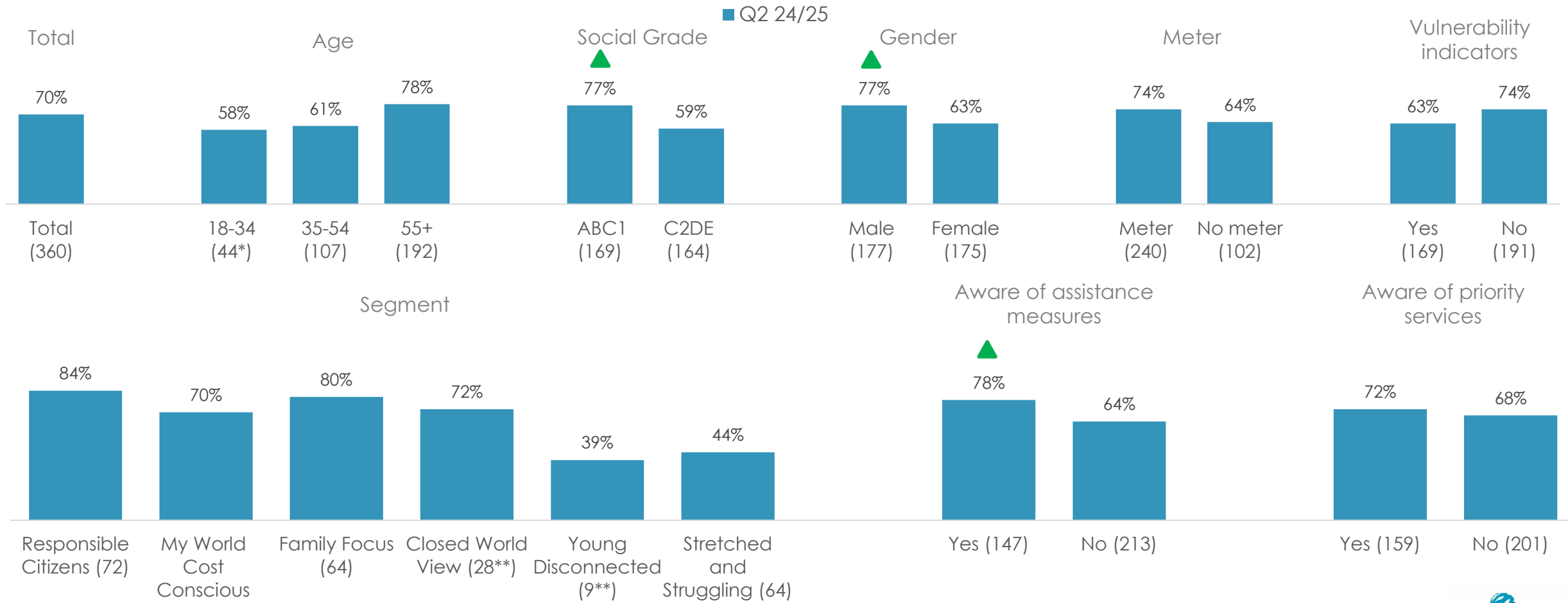
(% Poor)

■ Q2 24/25



Awareness of storm overflows and CSOs is higher among customers who are male, from a higher social grade, or aware of assistance measures.

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

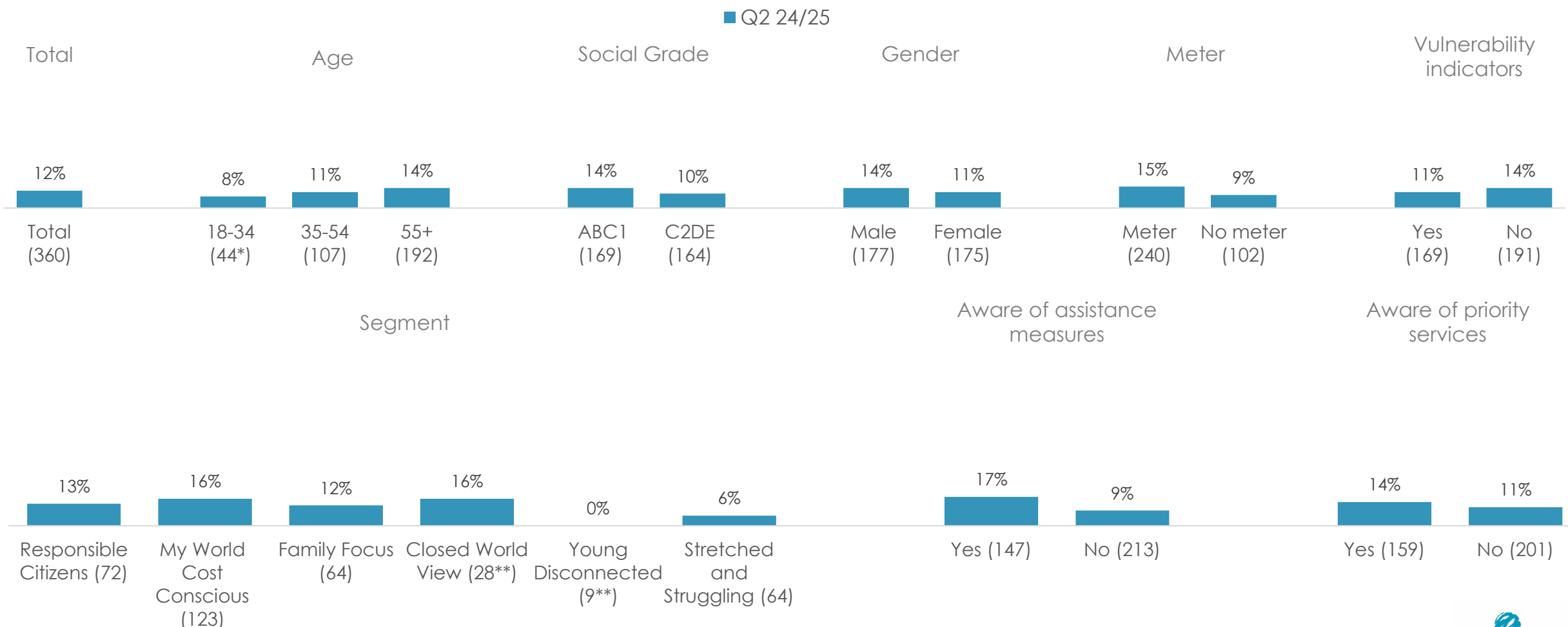


KEY: * Caution low base size ** Caution very low base size.

Awareness of the steps Wessex Water is taking to reduce storm overflows is low across different subgroups, with no significant differences.

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

(% Yes)

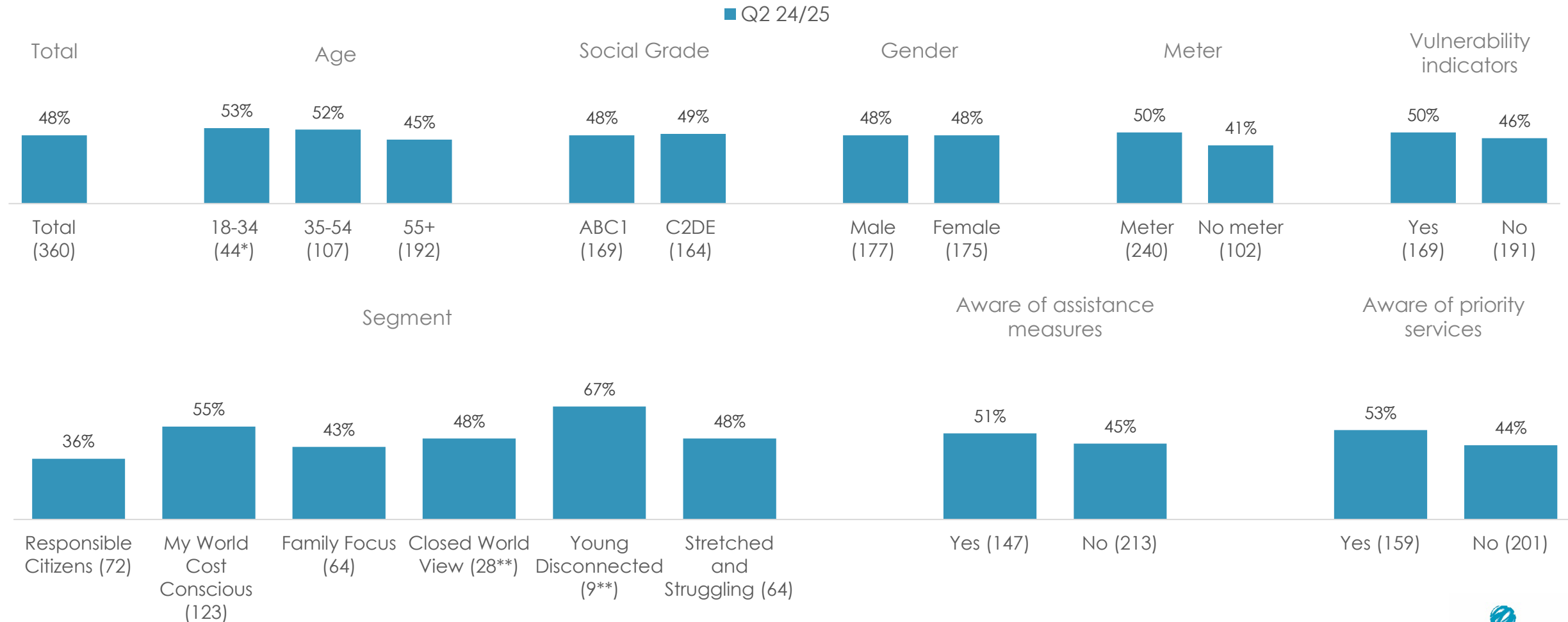


KEY: * Caution low base size ** Caution very low base size.

Interest in the benefits of smart meters - by key groups Q2 2024/2025

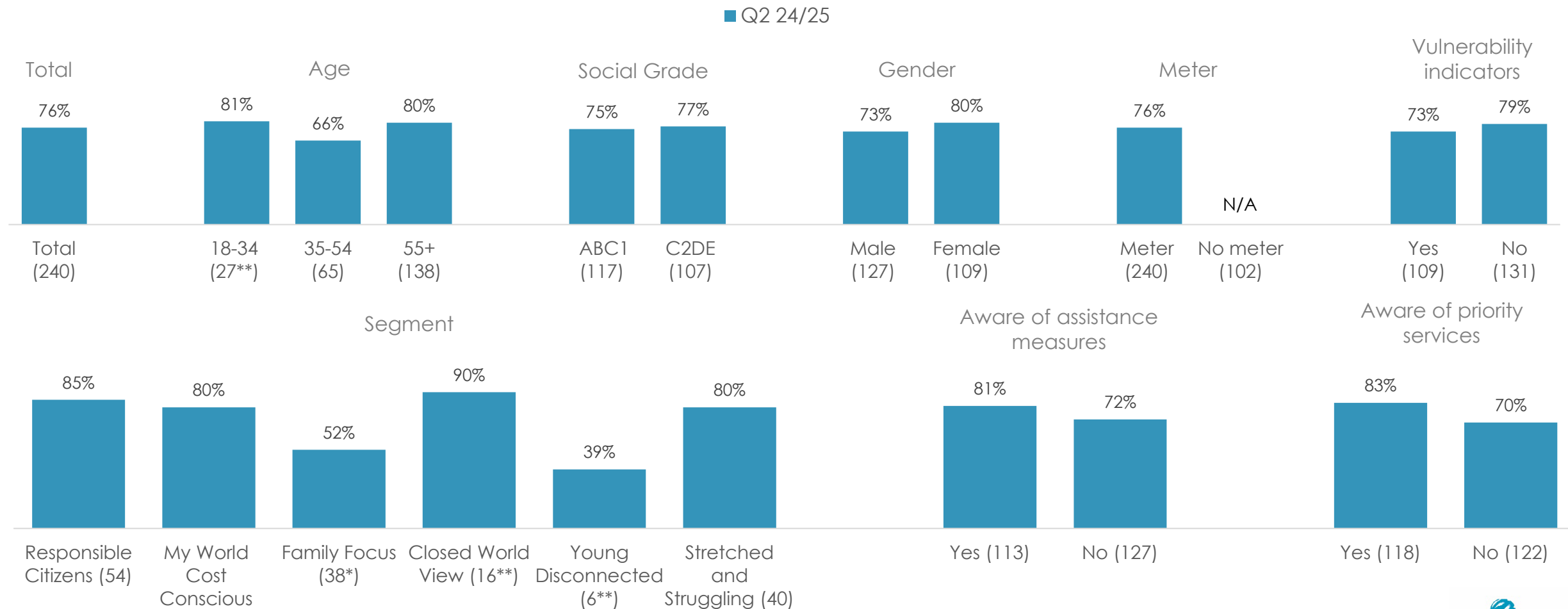
Interest in the benefits of smart meters is consistent across subgroups.

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)



Most customers with a water meter agree that they manage their water use to keep 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)



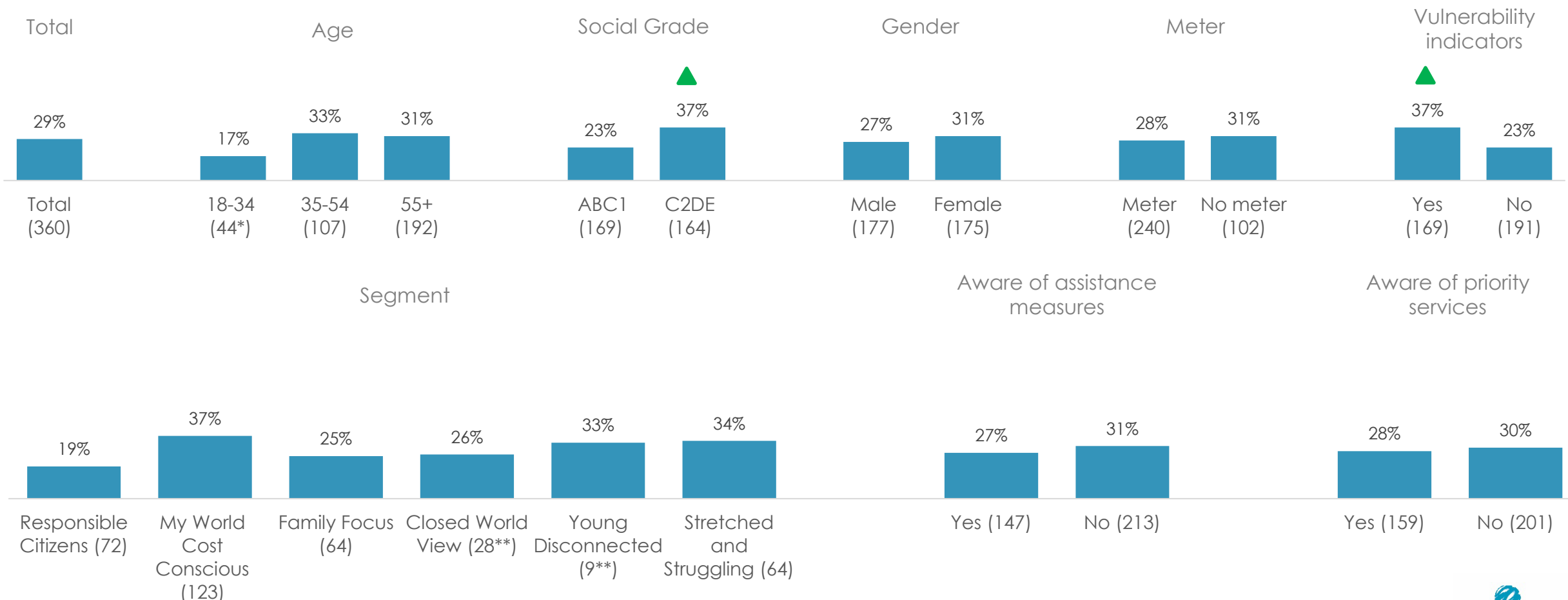
Reducing water use- by key groups Q2 2024/2025

Customers in lower social grades and those with a vulnerability indicator are significantly more likely to feel unsure about 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)

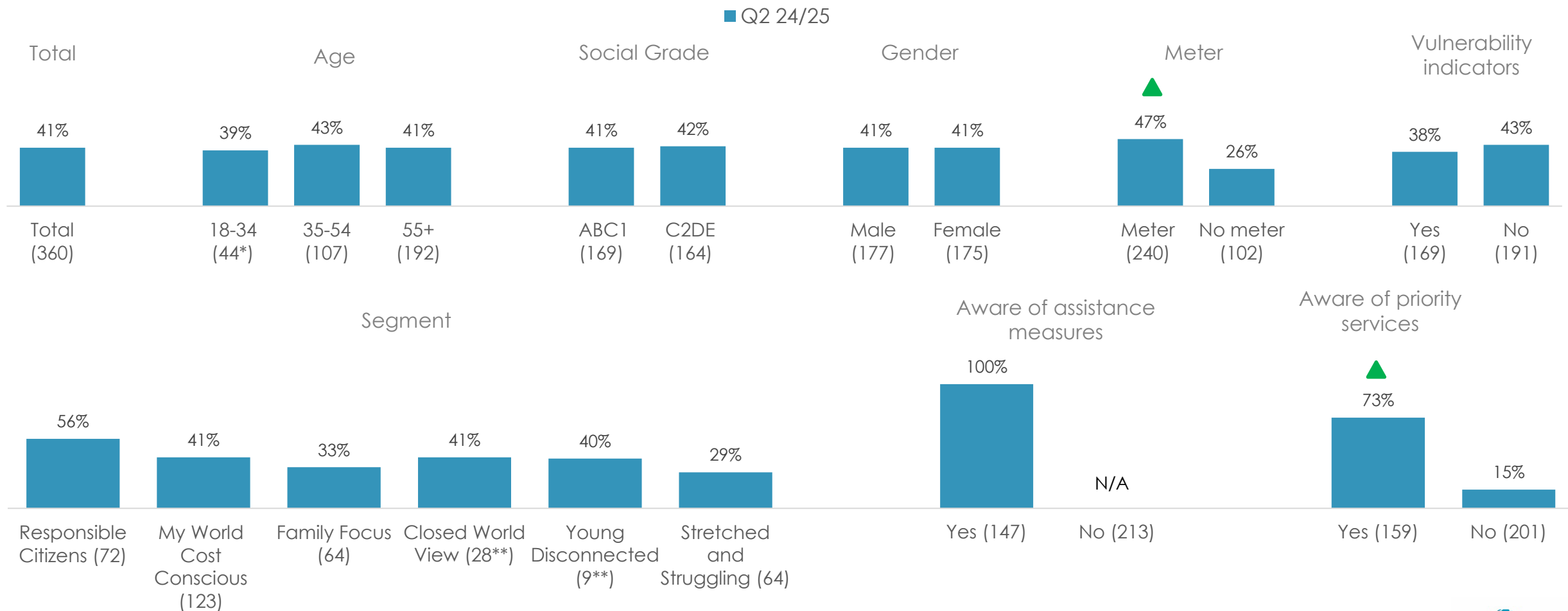
■ Q2 24/25



KEY: * Caution low base size ** Caution very low base size.

Awareness of assistance for customers who struggle to afford their bills is significantly higher among those with a water meter and those who are aware of priority services. Responsible Citizens are also more likely to be aware of financial aid.

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



Awareness of priority services provided by Wessex Water - by key groups Q2 2024/2025¹⁷

Half of customers with a water meter, and 4 in 5 customers who are aware of assistance measures, are aware of priority services.

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)

■ Q2 24/25

