Image Tracker Jul-Sept 2025

Report

October 2025

MRS™ Awards 2025
Finalist
Inclusive Research

Methodology changes

	'21/ '22 – '23/ '24	Q1 & Q2 '24/ '25	Q3' 24/25 onwards
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

Note: Given that the sample size for non bill payers is 73/554 for Q2 25/26, 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 the new segmentation (2024)

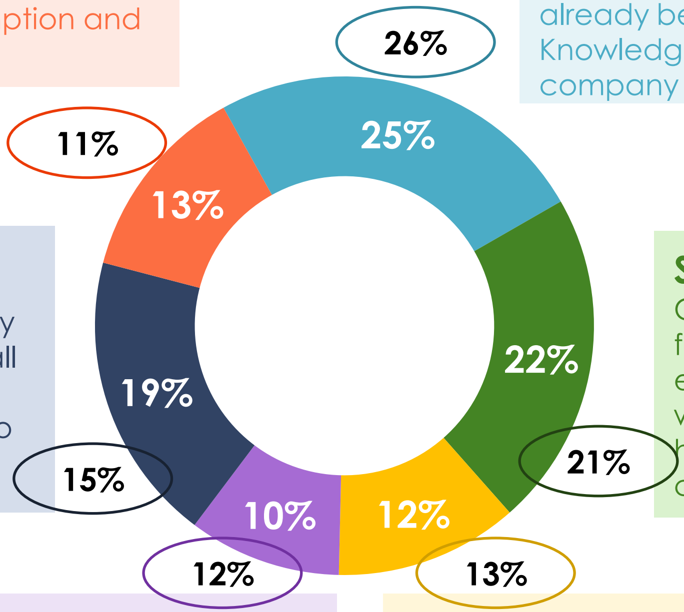
Customers are assigned into one of 6 segments.

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: Carefree 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 critical – 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.

Figures in the chart represent the customer proportions found in the original segmentation research sample.
The circle figures represent the proportions among this sample for Q2 25/26.

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Headline Summary: July-September 2025

1 **Satisfaction with Wessex Water and its services continues to decline,** with overall satisfaction and perceptions of value for money both reaching their lowest scores to date. Financial outlook remains mostly consistent with last Quarter, though showing some signs of potential recovery with increased 'sameness'. However, affordability concerns persist.

2 **Customer priorities for Wessex Water remain firmly focused on reliable water supply and effective sewerage services.** The perceived importance of community outreach, promoting social equality and reducing carbon emissions continues to ease. Personally, customers are now evenly split between prioritising cost and environmental friendliness this Quarter.

3 **Trust continues to erode, with the Trust Index reaching its lowest point since tracking began.** Declines are driven by ongoing drops in 'Competence & Capability', 'Ethics' and 'Brand Validation'. Trust in tap water quality has also fallen notably this Quarter to around only 3 in 4, though confidence regarding wastewater handling remains within more normal levels.

4 **Several brand health metrics have weakened, with ease of contact and caring about the environment and community both falling significantly since last Quarter.** Proactive engagement with Wessex Water has tailed off slightly though, so may be responsible for the former. Environmental improvements remain the most frequently mentioned area for action.

5 **Efforts to limit water usage remain widespread, with most customers continuing to moderate consumption. Interest in smart metering stays steady,** while a small summer uplift in key behaviours and water-saving device use this Quarter may signal modest behavioural momentum (though preparedness has not grown). Pro-Planet Advocates, Lifestyle Empowered and Convenience Cost Savers present the strongest opportunity for device uptake currently.

6 **Awareness of storm overflow releases remains high, holding steady at last Quarter's elevated level.** Word of mouth is growing as a source among those with more negative and less trusting views of Wessex Water - with over half of these customers citing these discussions for their awareness. Understanding of Wessex Water's actions to address overflows remains far lower (dipping a little after last Quarter's peak), now learnt primarily from Wessex Water magazines and email.

Wider context

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Overall context: July – September 2025

Timeline of key events

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

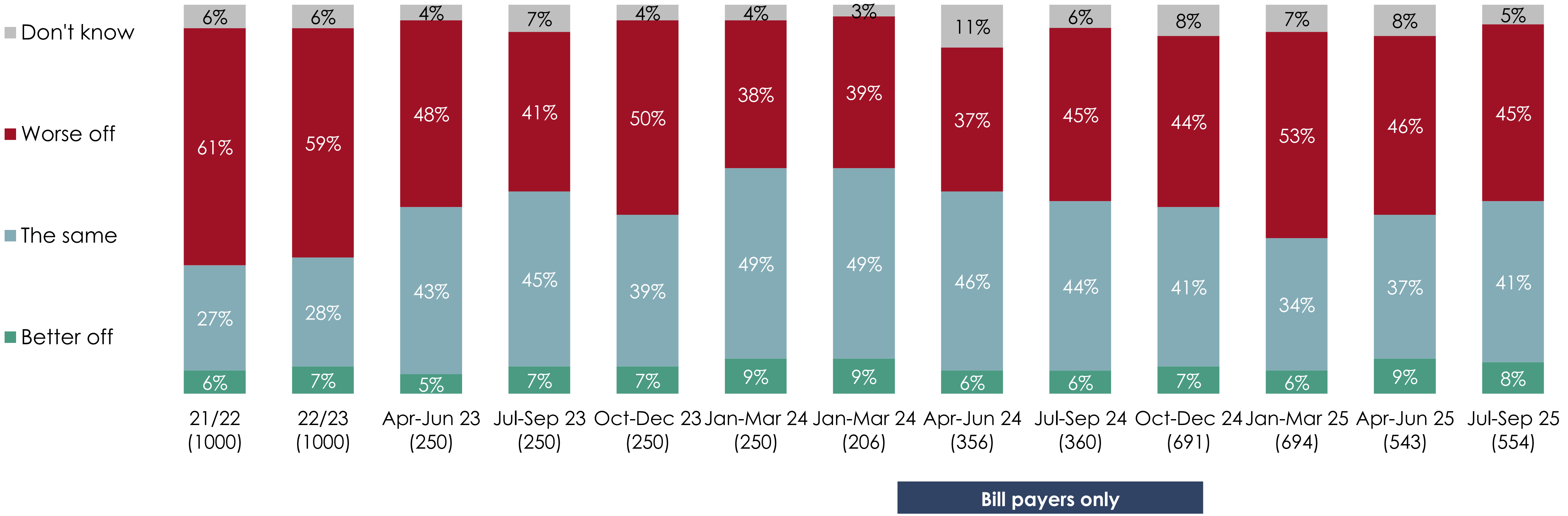
2024 | 2025

- **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
- **Jan** High rainfall leads to high ground-water levels and river flows
- **27 Jan** University of Portsmouth study finds that UK water industry is using deception tactics
- **29 Jan** Environment Agency secures £22bn of environmental commitments from water companies
- **18 Feb** Six water companies appeal to CMA to be able to raise bills further
- **24 Feb** Water (Special Measures) Act 2025 launched
- **6 Mar** River Action plans to sue Ofwat over bill increases
- **1 Apr** Household water bills increase by an average of 26% nationwide
- **1 May** Local government elections
- **28 May** Thames Water fined £122.7m in biggest penalty ever issued by Ofwat
- **2 Jun** Met Office reports that Mar-May was the warmest Spring on record in the UK
- **6 June** Six water companies (inc. Wessex Water) affected by bonus bans
- **2 July** UK Govt introduces reforms to Guaranteed Standards Scheme, which strengthens consumer protections
- **11-14 July** Hosepipe bans announced by three water companies, due to prolonged dry weather
- **7 Aug** Bank of England cuts interest rates to 4%
- **1 Sep** Ofwat Chief Executive, David Black, resigns a month after the UK Govt announces plan to abolish Ofwat
- **5 Sep** Keir Starmer performs a cabinet reshuffle, including a new Environment Secretary

Financial outlook shows little change since Q1, though the proportion expecting it to stay 'the same' has steadily returned to 2024 levels.

Expectations are broadly consistent across segments, though Lifestyle Empowered continue to be significantly more likely to feel they will be better off (15%).

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*

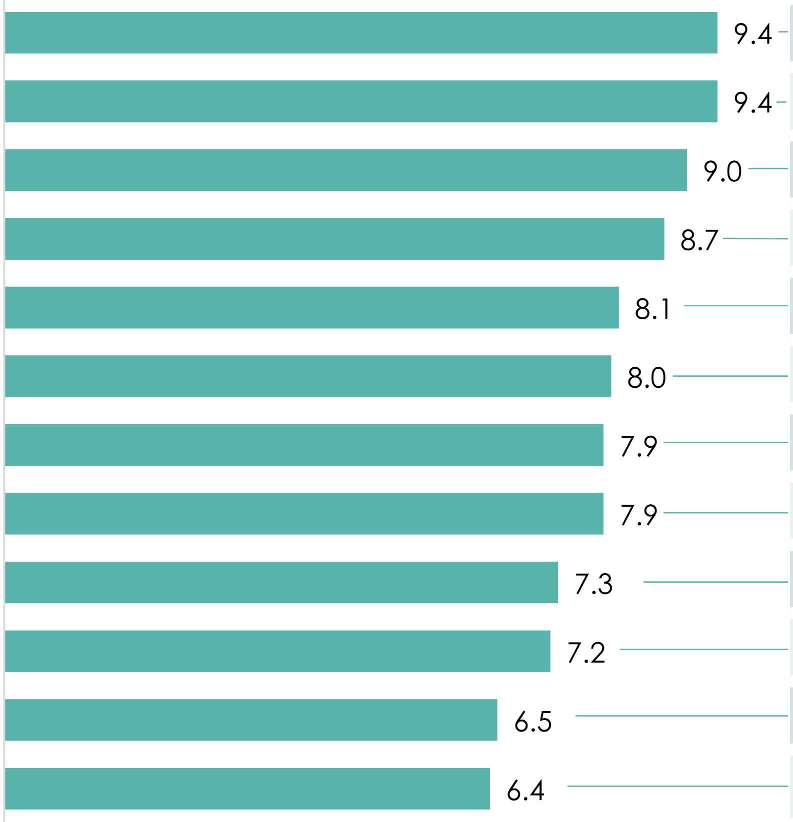


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

The hierarchy of customer priorities remains consistent with previous Quarters.

There continues to be a gradual decline in the perceived importance of community outreach, promoting social equality and reducing carbon emissions.

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*



	Q2 25/26 (554)	Q1 25/26 (543)	Q4 24/25 (694)	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	9.4	9.5	9.5	9.6	9.6	9.6	9.4	9.2	9.2
Ensuring the sewerage system is working effectively*	9.4	9.4	N/A						
Protecting and improving river/beach water quality*	9.0	8.9	N/A						
Giving great customer service	8.7	8.7	8.7	8.9	8.9	8.9	8.6	8.5	8.5
Reducing amount of water taken from local habitats*	8.1	8.1	8.6	8.7	8.7	8.8	8.1	7.9	7.9
Improving local habitats for plants and animals	8.0	8.0	N/A						
Supporting customers who struggle to pay their bills	7.9	8.0	7.9	8.1	8.1	8.4	8.6	8.4	8.4
Investing in infrastructure to support growing communities*	7.9	7.9	N/A						
Reducing their own carbon emissions	7.3	7.5	7.9	8.0	8.1	8.3	8.2	8	8.1
Being innovative and quick to launch new technologies	7.2	7.4	7.5	7.6	7.9	8	7.9	7.7	7.8
Working together with communities on local activities**	6.5	6.8	7.4	7.5	7.5	7.7	7.5	7.3	7.4
Promoting social equality and equal opportunities	6.4	6.7	6.7	7.1	7.1	7.1	7.1	7.1	7.2

Bill payers only

*New statements introduced in Q1 2025/26 **New statement wording introduced in Q1 2025/26
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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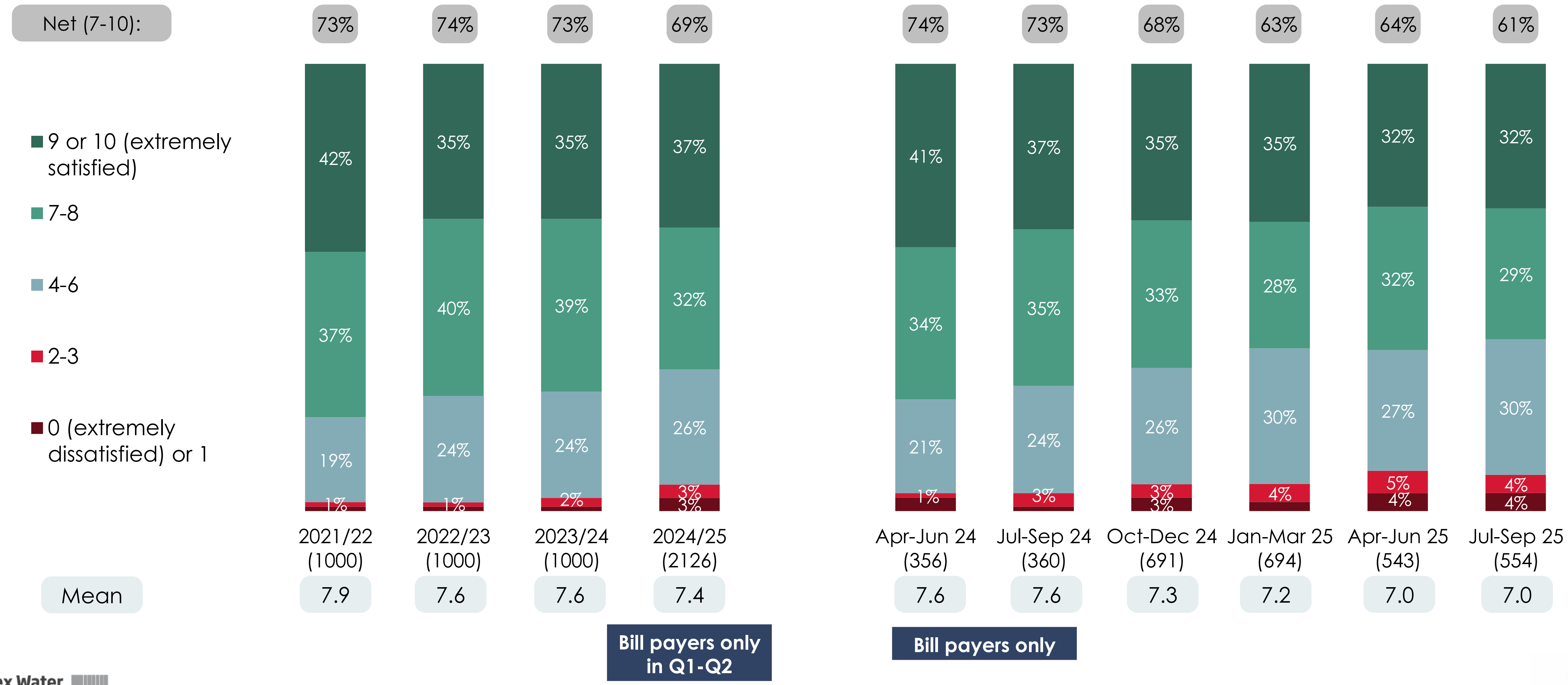
The proportion of satisfied bill payers has declined significantly year on year – scores are the lowest point.

Convenience Cost-Savers remain the least satisfied segment, though satisfaction has significantly declined among Responsible Environmentalists compared to the previous Quarter (not longer the most satisfied).

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 stays at its lowest level on record - significantly lower vs this time last year

Satisfaction has increased (directionally) among Responsible Environmentalists and Lifestyle Empowered, whilst Convenience Cost-Savers and Pro-Planet Advocates are significantly more dissatisfied than in Q1.

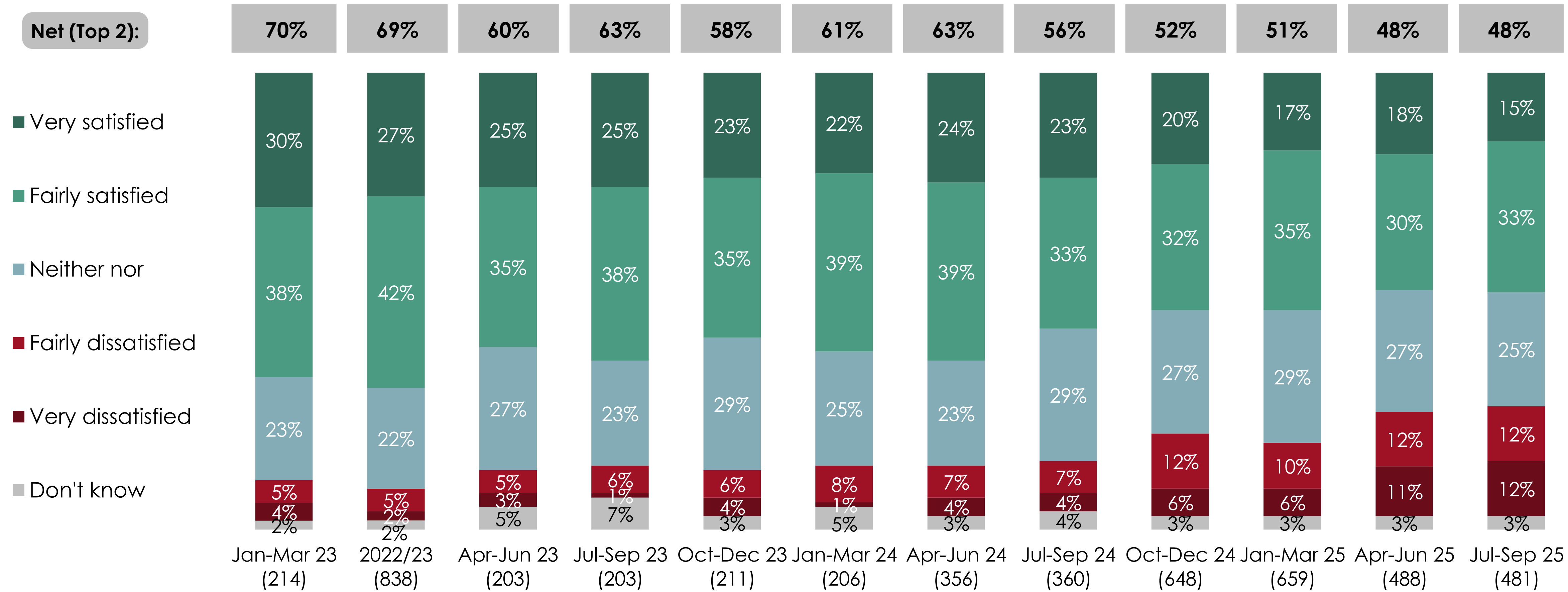
Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? *Base: All bill payers*

	2021/22 (827)	2022/23 (838)	Apr-Jun 23 (203)	Jul-Sep 23 (203)	Oct-Dec 23 (211)	Jan-Mar 24 (206)	Apr-Jun 24 (356)	Jul-Sep 24 (360)	Oct-Dec 24 (648)	Jan-Mar 25 (659)	Apr-Jun 25 (488)	Jul-Sep 25 (481)
Net (Top 2):	70%	69%	60%	63%	58%	61%	63%	56%	52%	51%	48%	48%
Very satisfied	26%	27%	25%	25%	23%	22%	24%	23%	20%	17%	18%	15%
Fairly satisfied	44%	42%	35%	38%	35%	39%	39%	33%	32%	35%	30%	33%
Neither nor	21%	22%	27%	23%	29%	25%	23%	29%	27%	29%	27%	25%
Fairly dissatisfied	5%	5%	5%	6%	6%	8%	7%	7%	12%	10%	12%	12%
Very dissatisfied	3%	2%	3%	1%	4%	1%	4%	4%	6%	6%	11%	12%
Don't know	2%	2%	5%	7%	3%	5%	3%	4%	3%	3%	3%	3%

Satisfaction with value for money stays at its lowest level on record - significantly lower vs Q2 last year.

Satisfaction has increased (directionally) among Responsible Environmentalists and Lifestyle Empowered, whilst Convenience Cost-Savers and Pro-Planet Advocates are significantly more dissatisfied than in Q1.

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*

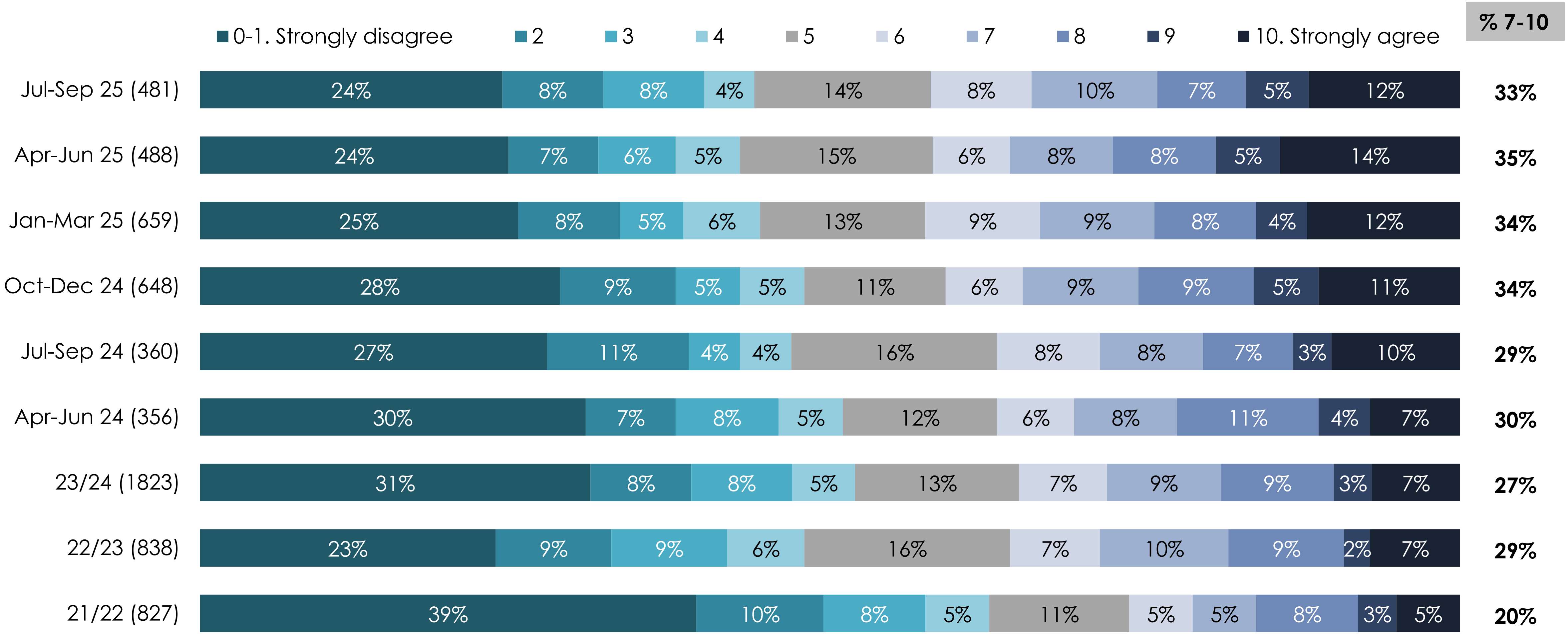


1 in 3 customers continue to remain anxious about affording their water bills.

C2DE customers, those without a water meter and Pro-Planet Advocates are the most likely subgroups to feel worried. Responsible Environmentalists remain the least worried segment – however, their level of concern has slightly increased since the previous Quarter.

Q15. How strongly do you agree or disagree…? I worry about being able to afford my water bill

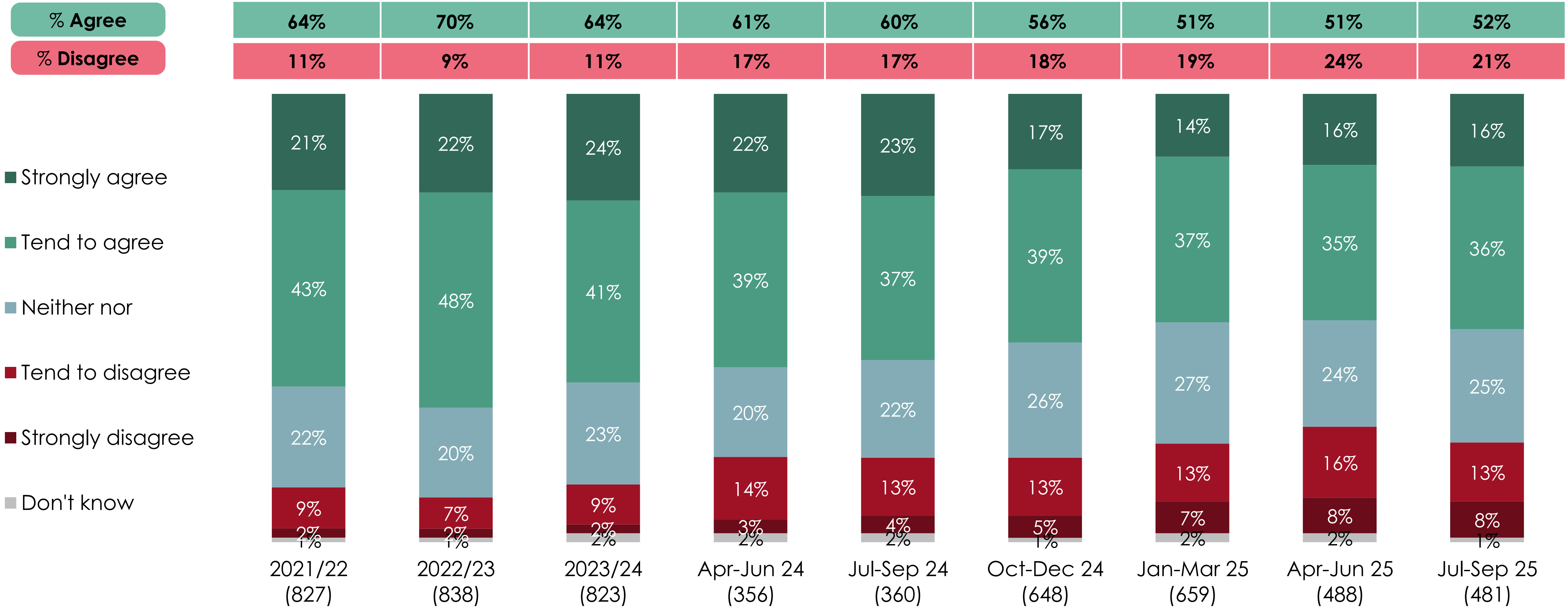
Base: All bill payers



Affordability perceptions have declined since 2022/23 – but have recovered from last Quarter's negativity.

Convenience Cost Savers, 18–34s and customers without a water meter are the most likely to disagree with this statement.

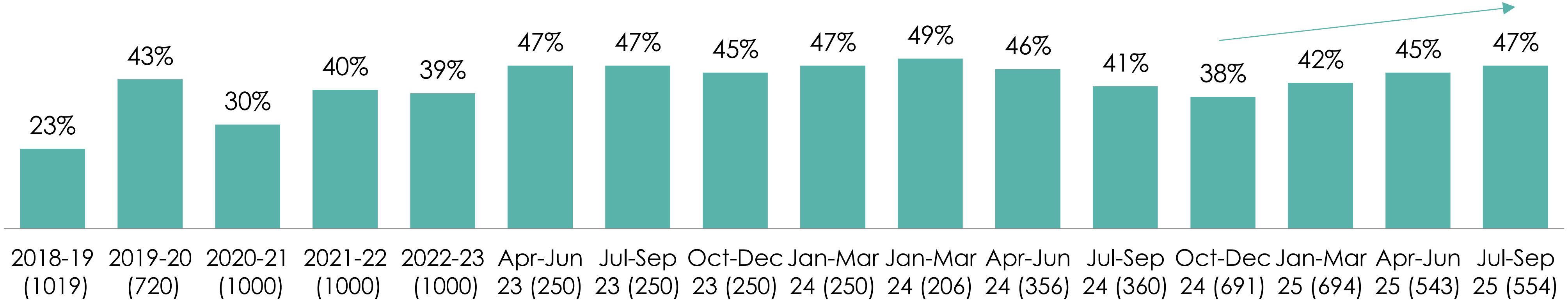
Q17. How much do you agree/disagree: "The total water and sewerage charges that you pay are affordable to you"?
Base: All bill payers



Awareness of Priority Services remains stable, whilst the proportion aware of financial support continues to recover from the dip observed in late 2024/25.

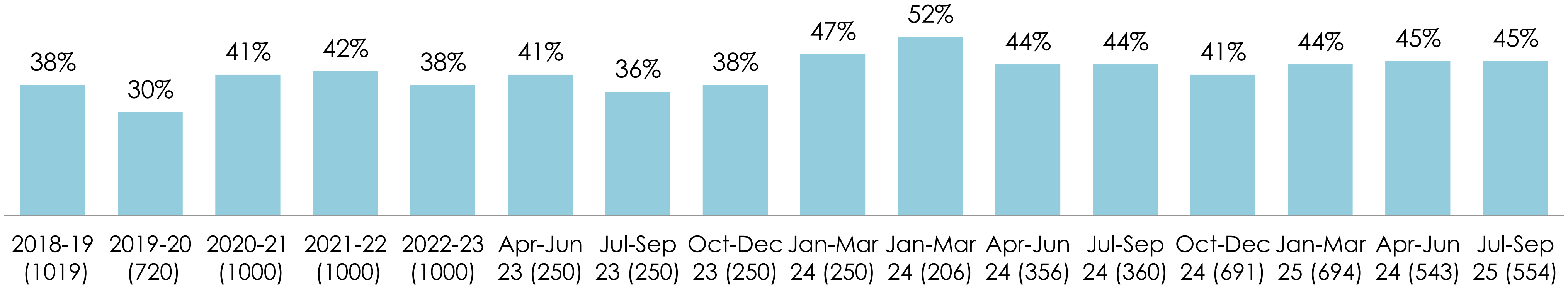
Those who feel their bill charges are unaffordable are significantly less likely to be aware of financial support and has declined year on year. Since the previous Quarter, awareness of financial support has increased among 35-54s after the dip in Q1.

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



Bill payers only

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

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

Indicators of trust

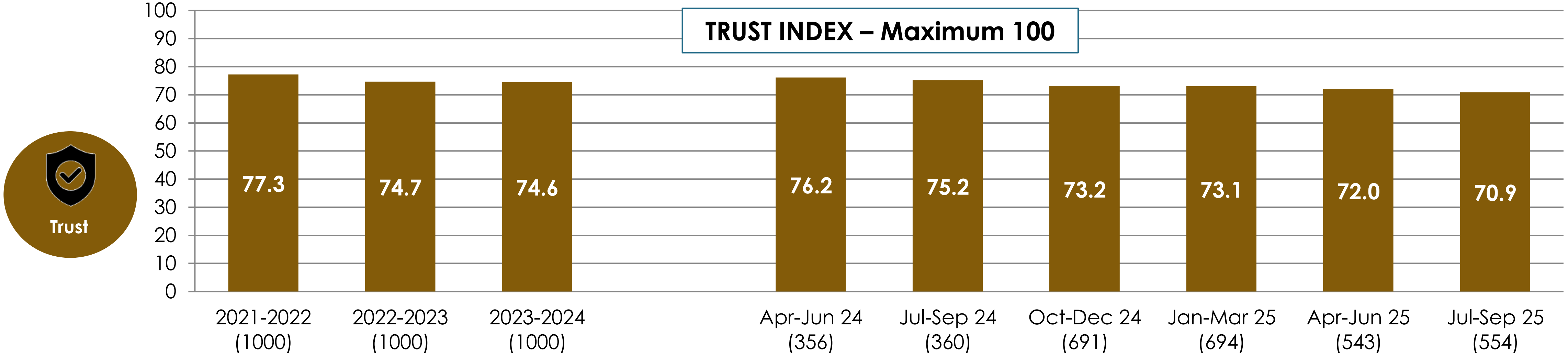
Trust

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 score falls to its lowest score since tracking began in 2021/22.

'Competence & capability', 'Ethics' and 'Brand validation' take the biggest hits this Quarter.



Components – Mean scores

	2021-2022 (1000)	2022-2023 (1000)	2023-2024 (1000)	Apr-Jun 24 (356)	Jul-Sep 24 (360)	Oct-Dec 24 (691)	Jan-Mar 25 (694)	Apr-Jun 25 (543)	Jul-Sep 25 (554)
Reliability and dependability	8.20	8.05	8.18	8.30	8.33	8.12	8.02	7.99	7.90
Competence & capability	7.68	7.39	7.23	7.44	7.56	7.22	7.23	7.19	6.99
Customer ethos	7.64	7.40	7.34	7.63	7.41	7.29	7.27	7.11	7.00
Transparency	7.78	7.62	7.73	7.73	7.79	7.47	7.47	7.35	7.31
Ethics	7.44	7.16	6.93	7.08	6.93	6.87	6.81	6.75	6.56
Brand validation	7.42	6.98	6.97	7.06	7.13	6.57	6.66	6.51	6.28

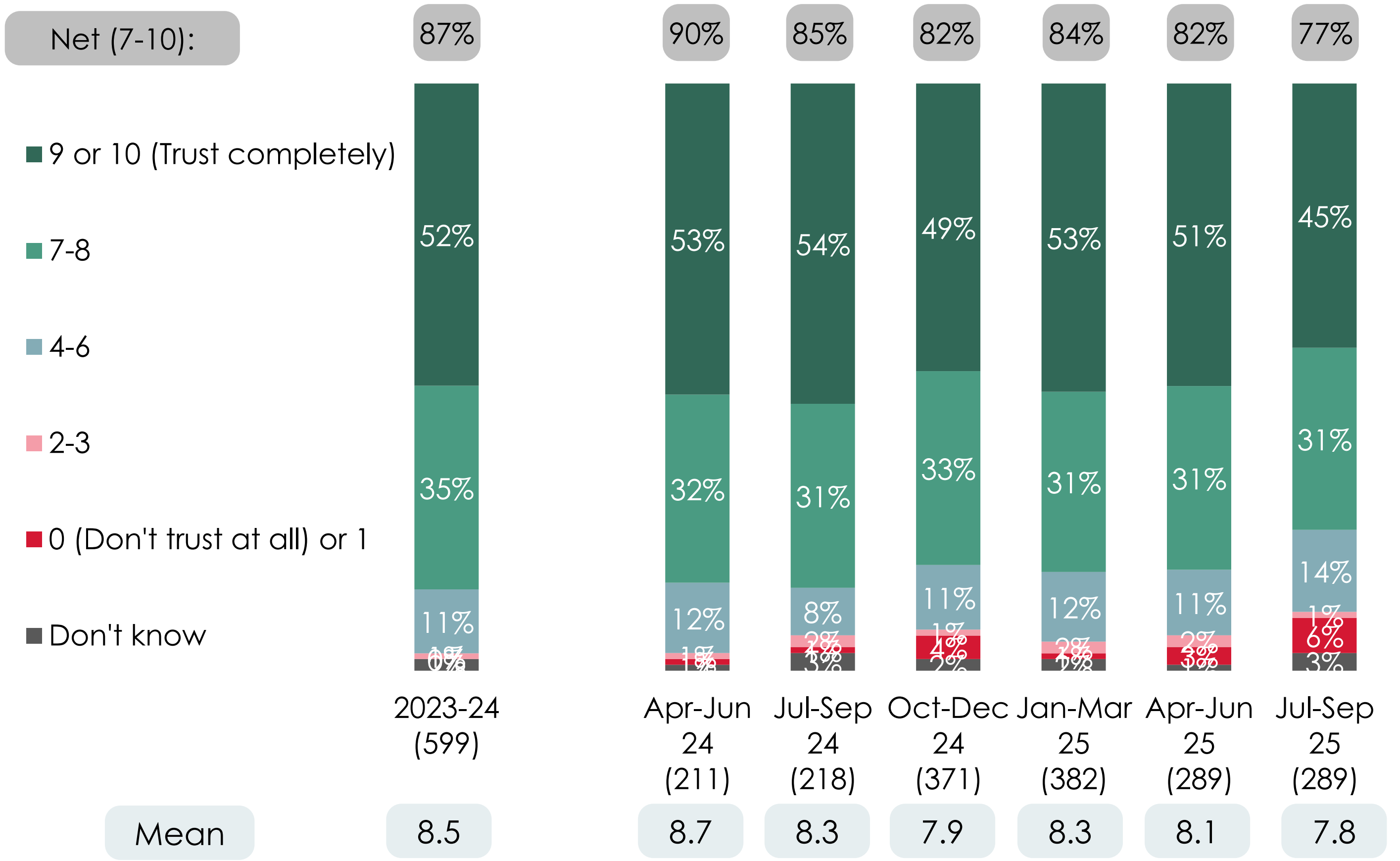
Bill payers only

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

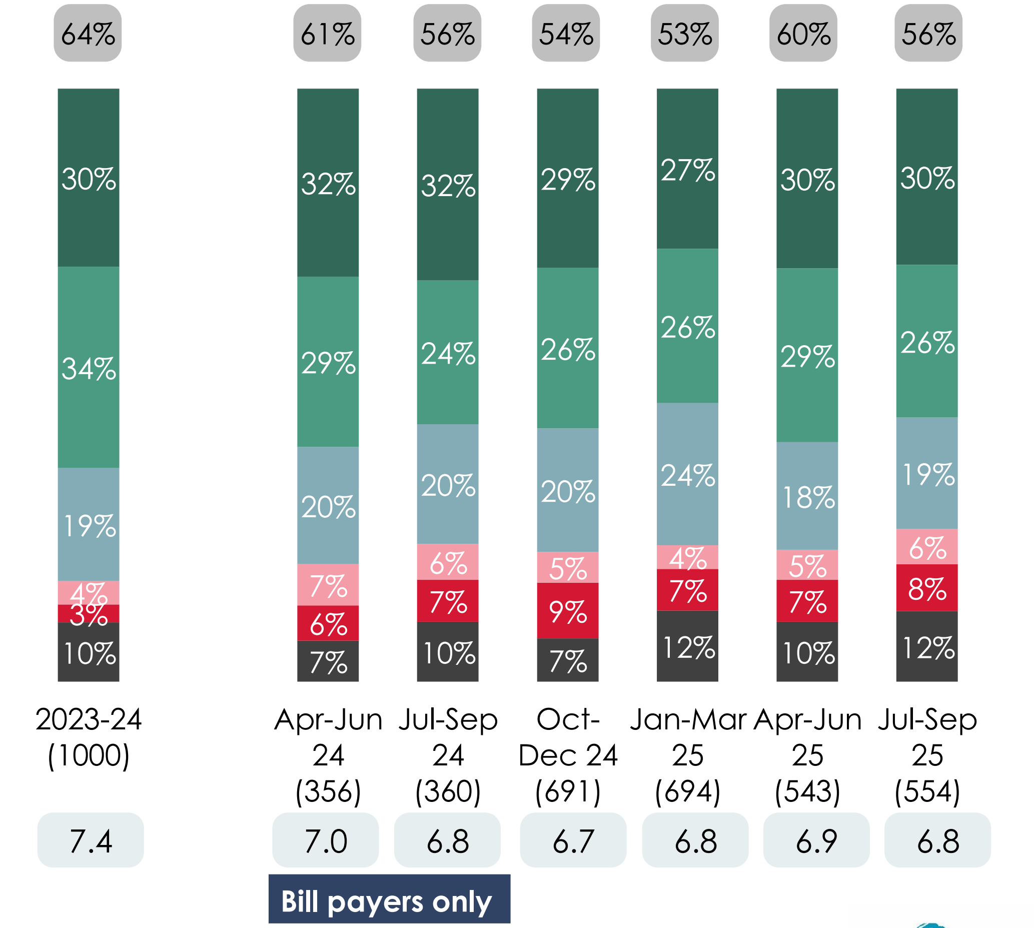
Trust in tap water quality has significantly declined this Quarter to a record low. Trust in Wessex Water to responsibly manage wastewater and sewage returns falls slightly after a spike in Q1.

Since Q1, there has been a significant decline in trust in tap water quality among Responsible Environmentalists (-13%).

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

Knowledge and Sentiment

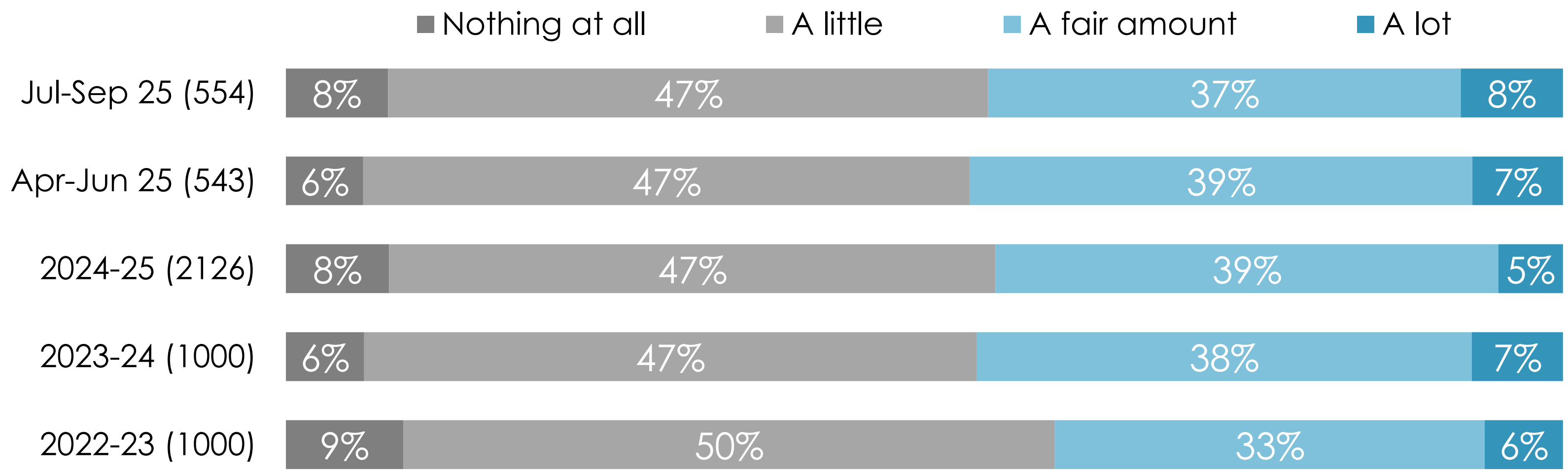
Knowledge

The proportion of customers who feel **knowledgeable** about Wessex Water is consistent with the average observed in 2024/25.

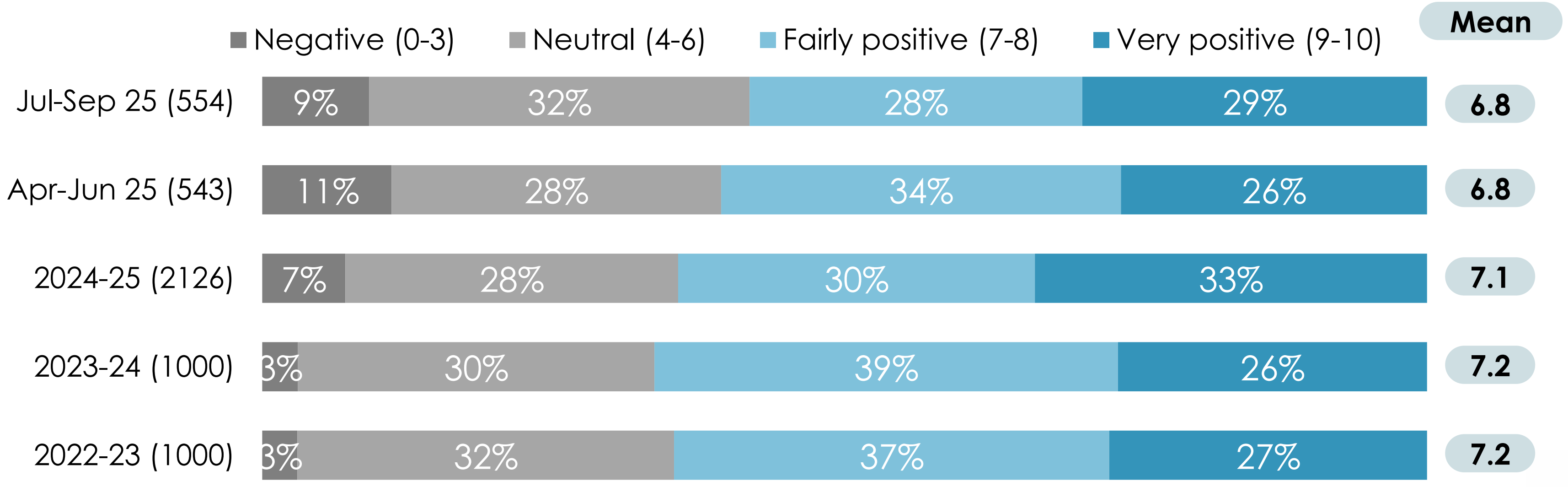
Sentiment

The proportion feeling **positive** about Wessex Water has continued to decline since the scores observed in 2023/24 - though more are 'very positive'.

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

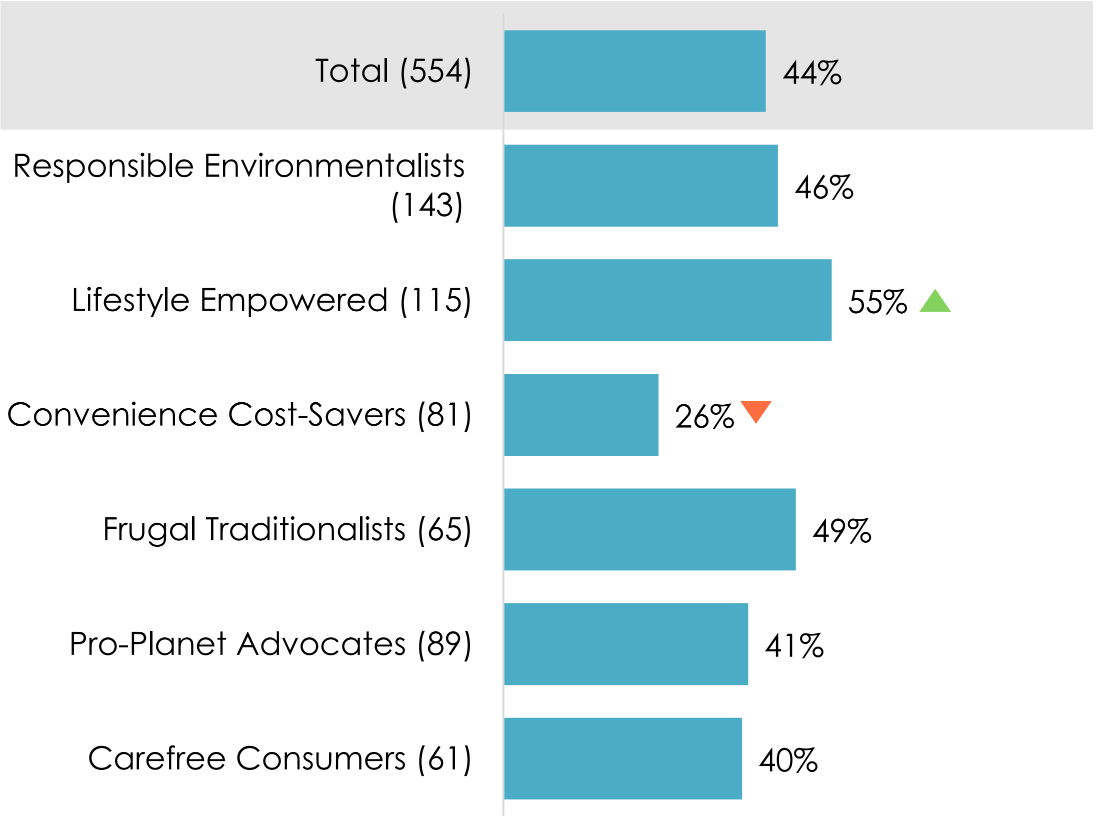


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

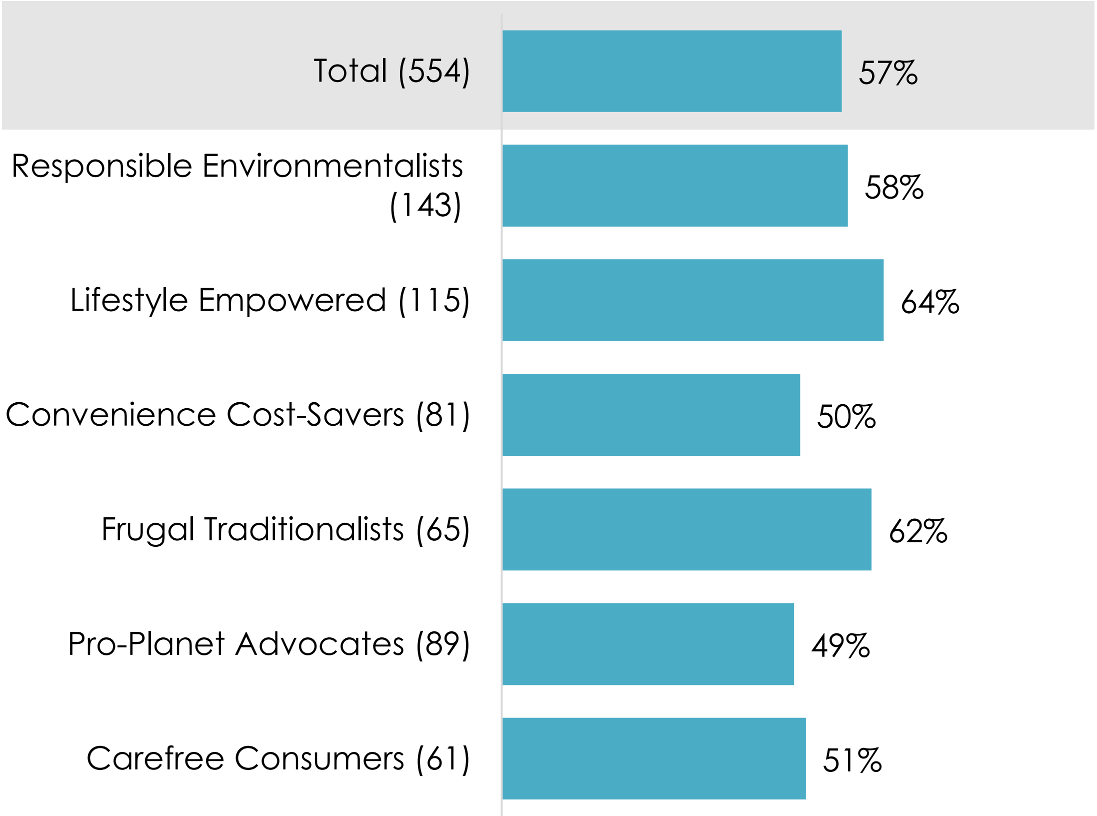
Lifestyle Empowered remain above average for perceived knowledge this Quarter (now significant), while Responsible Environmentalists fall down to closer to average scores.

Sentiment towards Wessex Water is much flatter, with no significant differences between segments.

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 us how do you feel about them overall?
(% Fairly/very positive, 7-10)



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

▲ Sig higher than Q2 total
▼ Sig lower than Q2 total

Brand health and image

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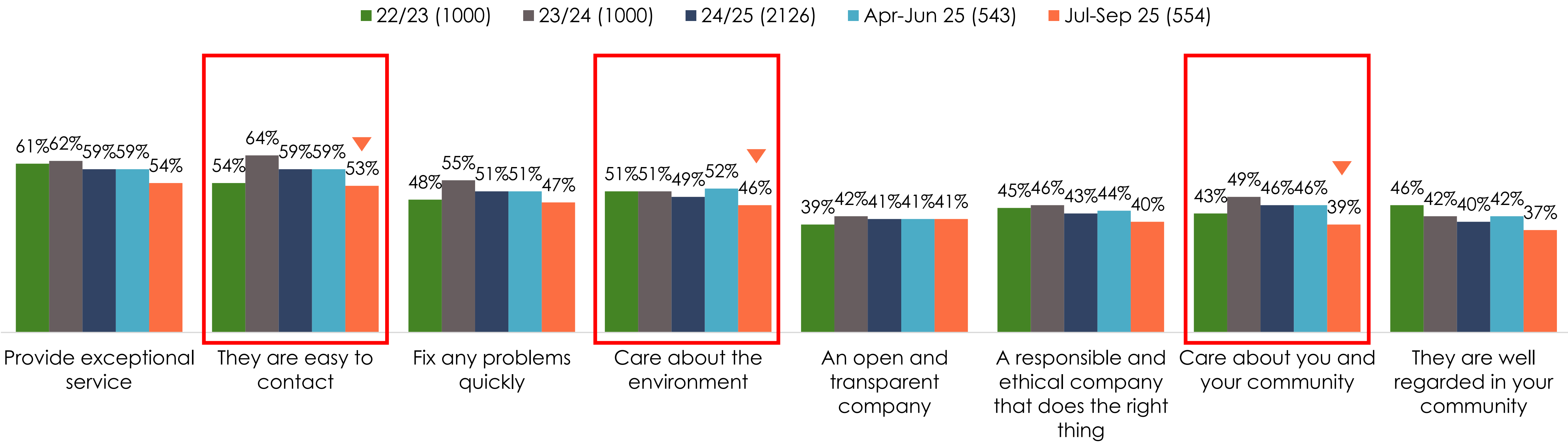
Almost all brand imagery metrics have declined since Q1.

'Easy to contact' has declined significantly and is now the second most positive impression associated with Wessex Water.

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*



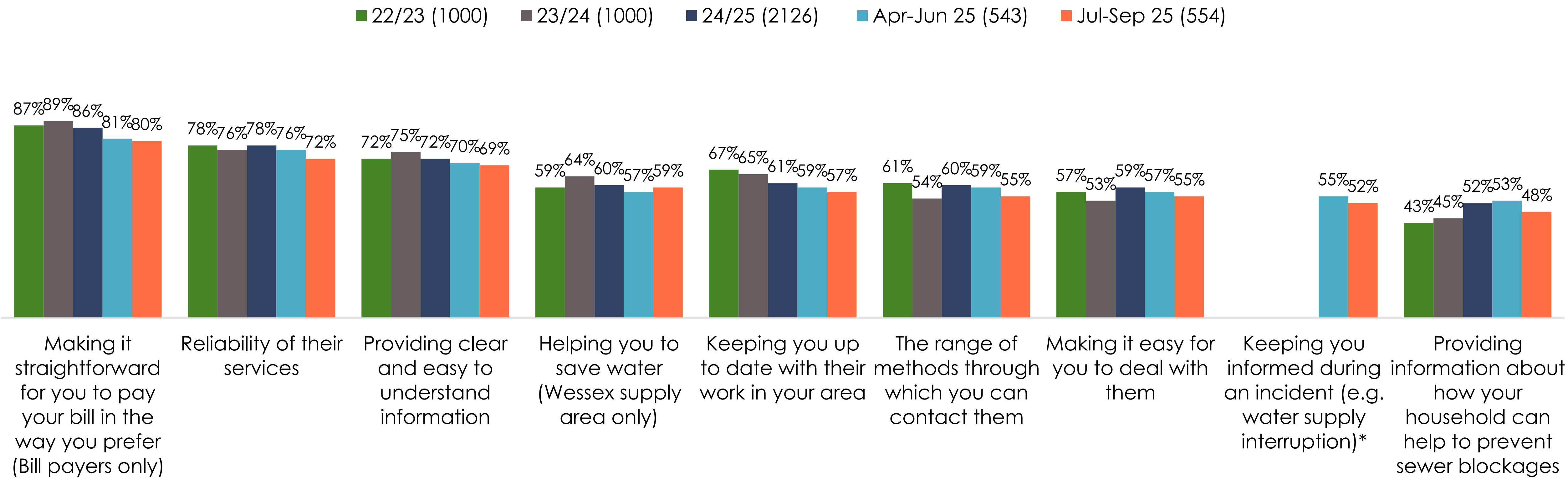
Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers; *Code list change in Q1 2025/26 – 'Innovative and technologically advanced' dropped

Sig higher than Q1 25/26
Sig lower than Q1 25/26

Almost all performance metrics have also marginally dropped since last Quarter.

Customers in the Wessex Water region remain more positive than those in Bristol or Bournemouth for most metrics. The segments score broadly similar on these metrics.

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

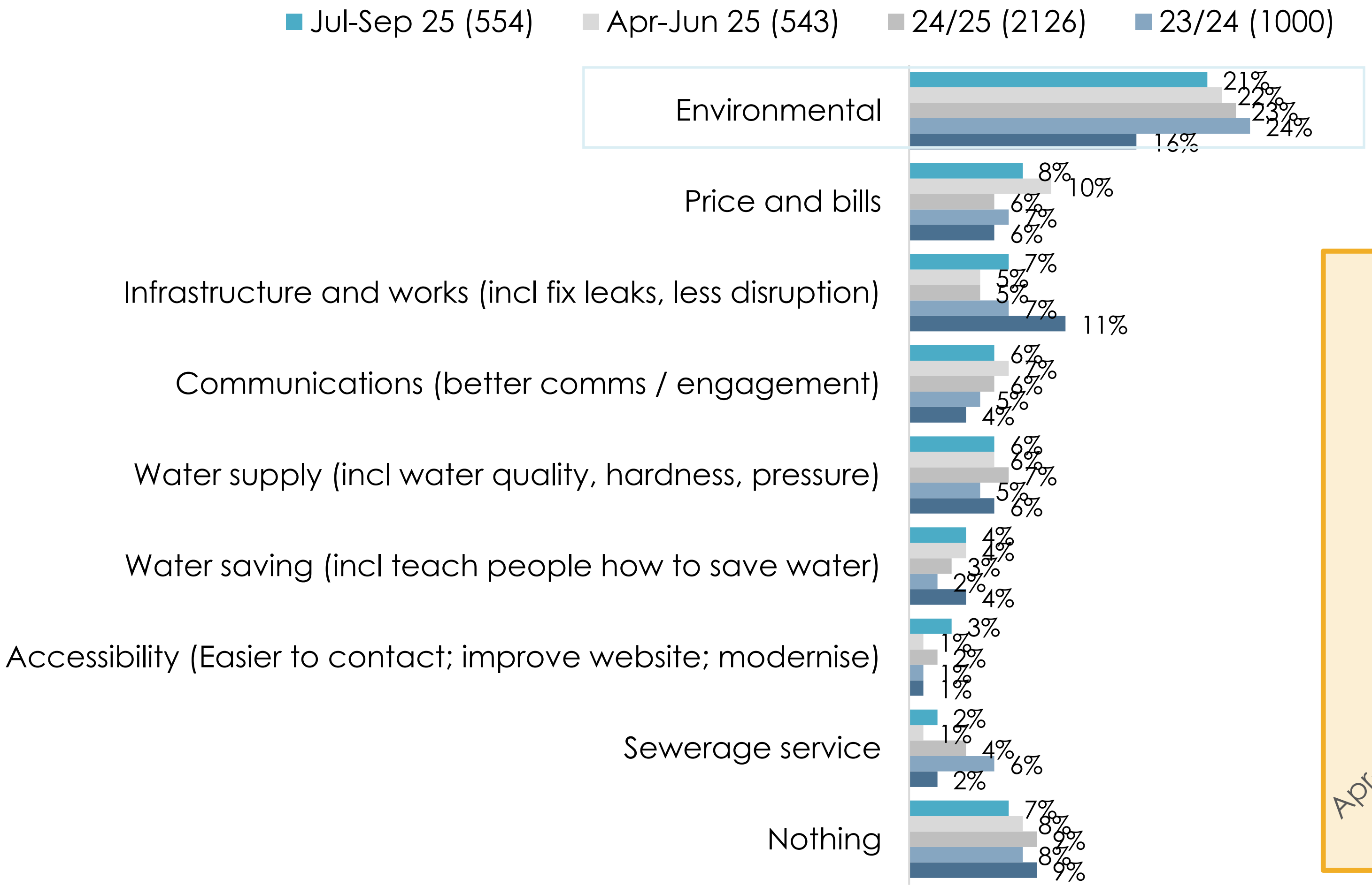


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers *New statement introduced in Q1 2025/26 – 'Keeping you informed during an incident (e.g. water supply interruption)'

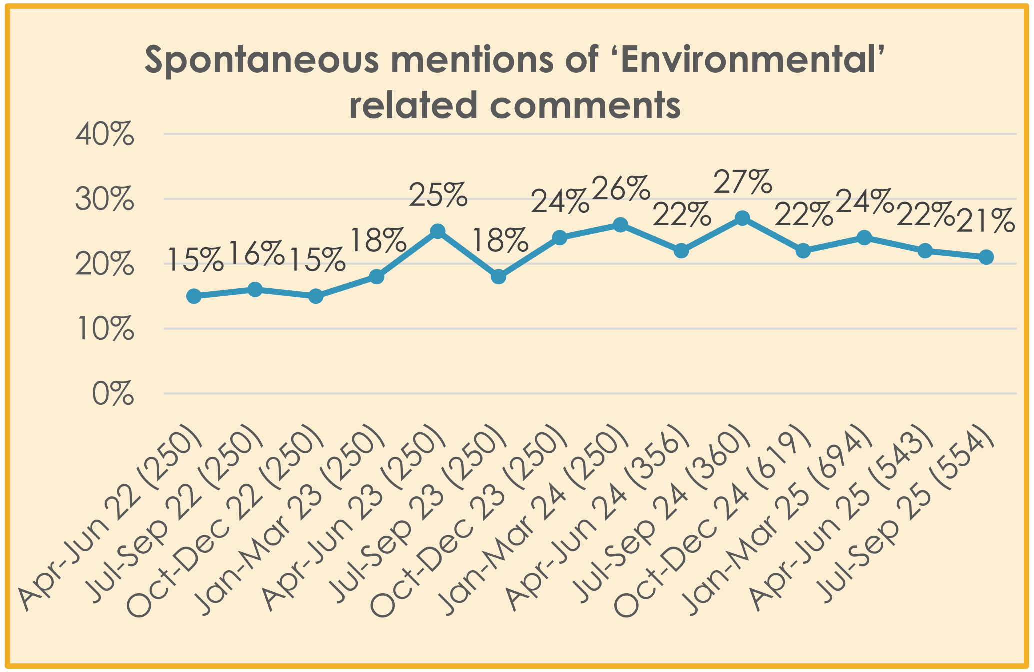
Environmental issues continue to lead the agenda in terms of future improvements to the service.

Those who don't trust Wessex Water to responsibly manage wastewater are the most likely to cite environmental factors (48%).

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	9%
Should be less sewage in rivers/sea	7%
Be more environmentally friendly	3%



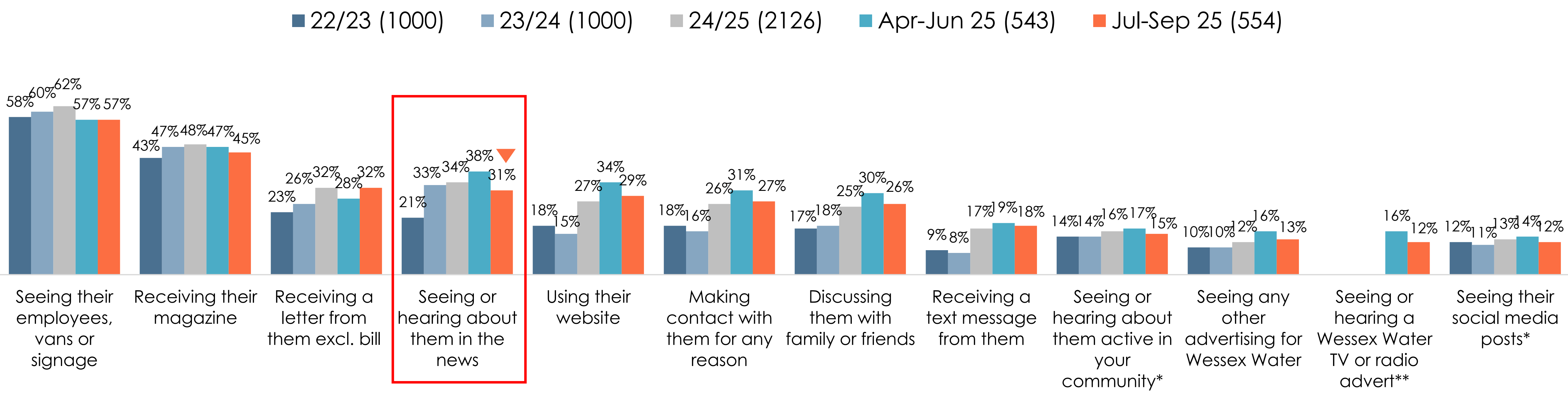
Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

Proactive engagement with Wessex Water has declined this Quarter after the rise observed in Q1.

Those dissatisfied with Wessex Water were significantly more likely to recall seeing or hearing about Wessex Water in the news and to use the Wessex Water website.

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

Base: All respondents



▲ Sig higher than Q1 25/26
▼ Sig lower than Q1 25/26

Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers
*Minor statement wording change in Q1 2025/26 **New statement introduced in Q1 2025/26

Convenience Cost-Savers remain significantly less likely to recall receiving their magazine.

The proportion of Convenience Cost-Savers and Frugal Traditionalists recalling seeing or hearing about Wessex Water in the news has notably decreased since last Quarter – and still significantly below the average.

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

	Total	Responsible Environmentalists	Lifestyle Empowered	Convenience Cost-Savers	Frugal Traditionalists	Pro-Planet Advocates	Carefree Consumers
Base size	**554**	**143**	**115**	**81**	**65**	**89**	**61**
Seeing their employees, vans or signage	57%	56%	64%	50%	60%	53%	54%
Receiving their magazine	45%	**58%** ▲	48%	**23%** ▼	50%	42%	35%
Receiving a letter from them other than your bill	32%	24%	41%	24%	31%	37%	32%
Seeing or hearing about them in the news	31%	36%	**41%** ▲	**17%** ▼	**18%** ▼	31%	27%
Using their website	29%	30%	36%	29%	26%	27%	21%
Making contact with them for any reason	27%	26%	33%	23%	29%	30%	17%
Discussing them with family or friends	26%	25%	28%	28%	17%	27%	27%
Receiving a text message from them	18%	17%	24%	11%	23%	14%	16%
Seeing or hearing about them active in your community	15%	16%	20%	10%	10%	17%	8%
Seeing any other advertising for Wessex Water	13%	9%	20%	17%	8%	13%	12%
Seeing or hearing a Wessex Water TV or radio advert	12%	8%	13%	7%	7%	**23%** ▲	13%
Seeing their social media posts	12%	10%	12%	17%	12%	9%	11%

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

▲ Sig higher than Q2 total
▼ Sig lower than Q2 total

Photo by Pixabay on Unsplash

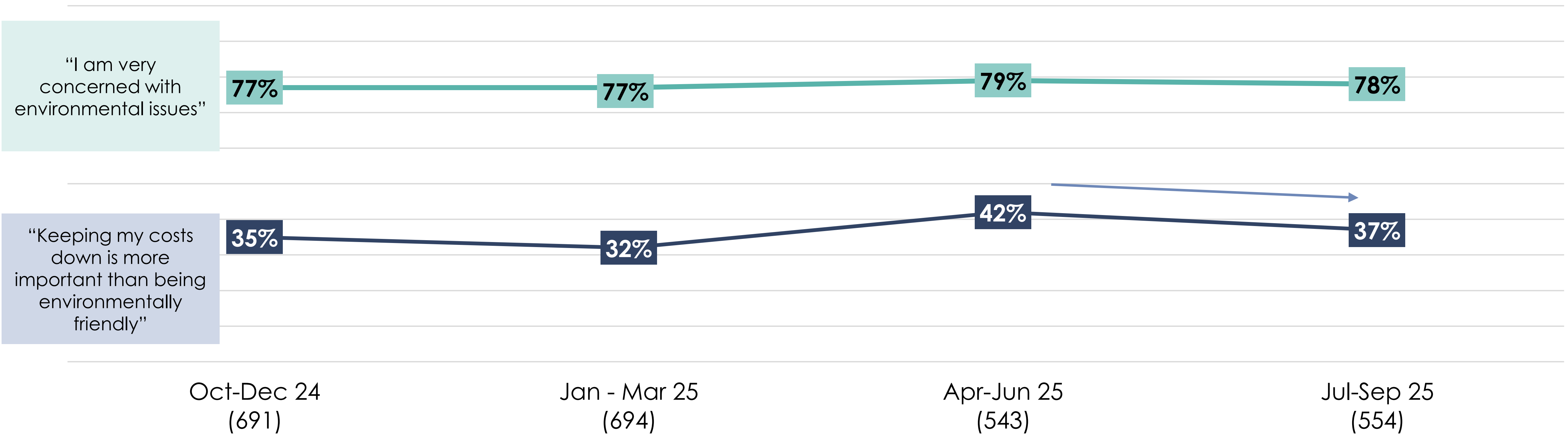
Environmental attitudes

BLUE MARBLE

After a peak in Q1, the proportion who feel keeping costs down is more important falls this Quarter (though levels still heightened). Environmental concern remains consistent.

Frugal Traditionalists are still the segment most likely to agree that costs are more important (58%), though this has declined slightly this Quarter.

Q3. Thinking about your own social and environmental views, how much do you agree or disagree with the following statements? (% strongly agree/somewhat agree)
Base: All respondents



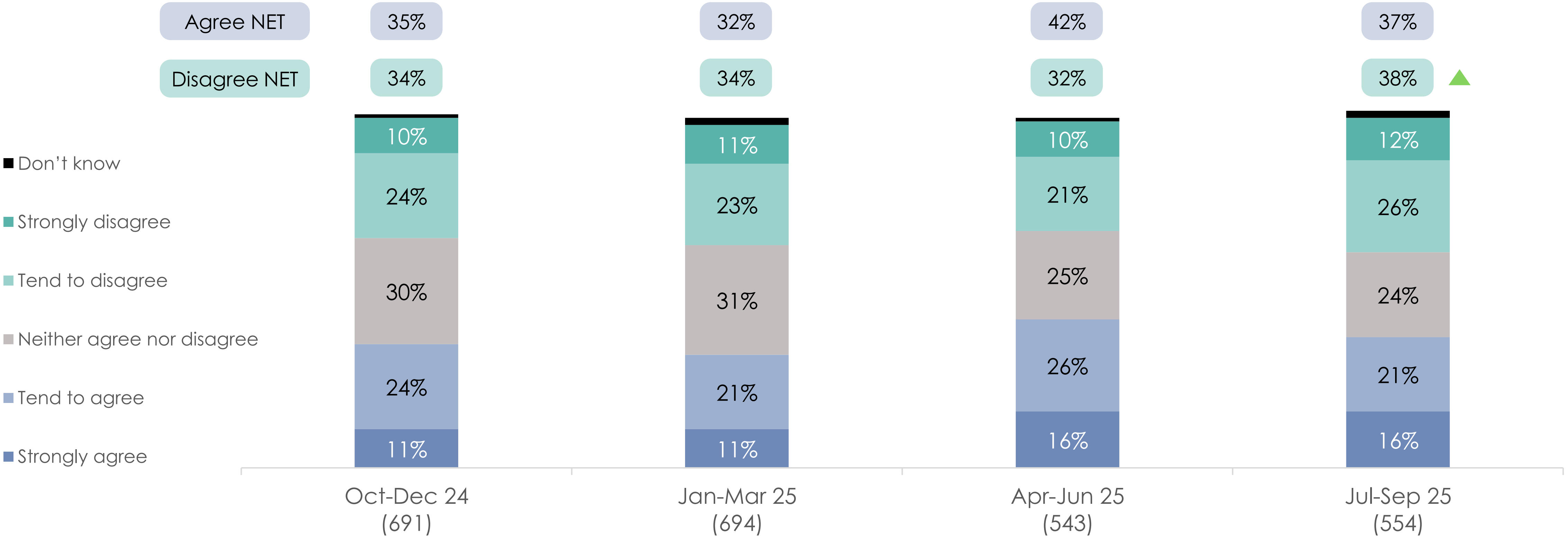
Source: New question for Q3 2024/5

Proportions return to an even split in those prioritising lower costs over environmental friendliness for Q2.

More than half of Responsible Environmentalists still prioritise keeping costs down - the highest proportion of across segments. The proportion of Lifestyle Empowered customers holding this view has also significantly increased this quarter.

Q3. Thinking about your own social and environmental views, how much do you agree or disagree with the following statement: "Keeping my costs down is more important than being environmentally friendly"?

Base: All respondents

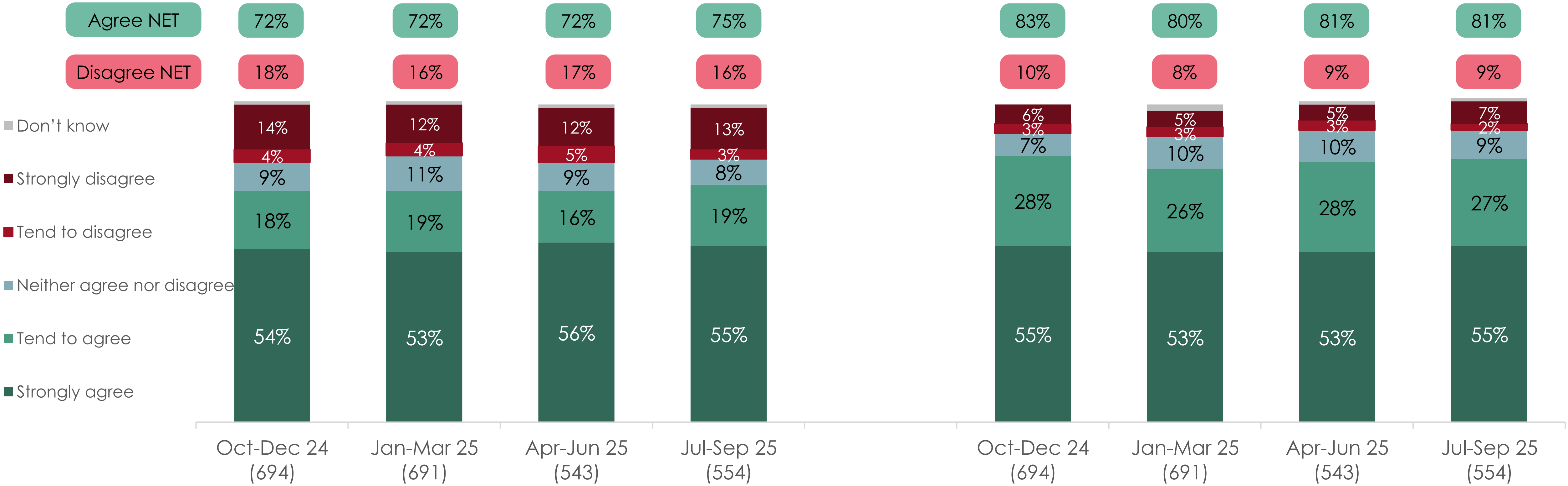


Source: New question for Q3 2024/5

The majority say both individuals and water companies must do their part for the environment.

There is a slightly uplift in customers agreeing that water companies should do more to look after the environment – up 13 pts for Carefree Consumers. However, half of Carefree Consumers still actively disagree with water companies needing to do more here.

Q3/5b. How much do you agree or disagree with the following statements?
Base: All respondents



"Water companies should be doing more to look after the environment"

"We must all do our bit to reduce the effects of climate change"

Source: New question for Q3 2024/5

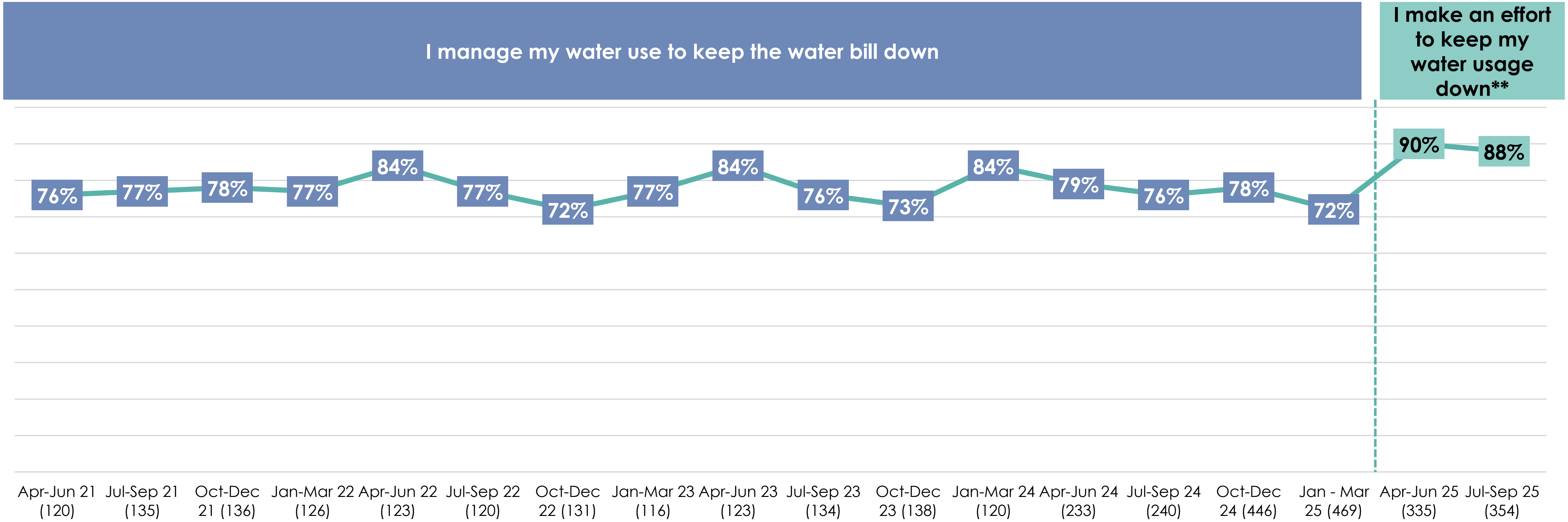
Water use behaviours

BLUE MARBLE

Almost 9 in 10 customers continue to claim they make an effort to keep their water usage down.

Those who feel they get good value for money, C2DEs and those over 55+ are all significantly more likely than their counterparts to ‘strongly agree’ that they do this – but these differences flatten at the ‘agree NET’ level.

QF1. And how much would you agree or disagree with …? % rating 7-10 (10 = ‘strongly agree’).
Base: All who have a water meter

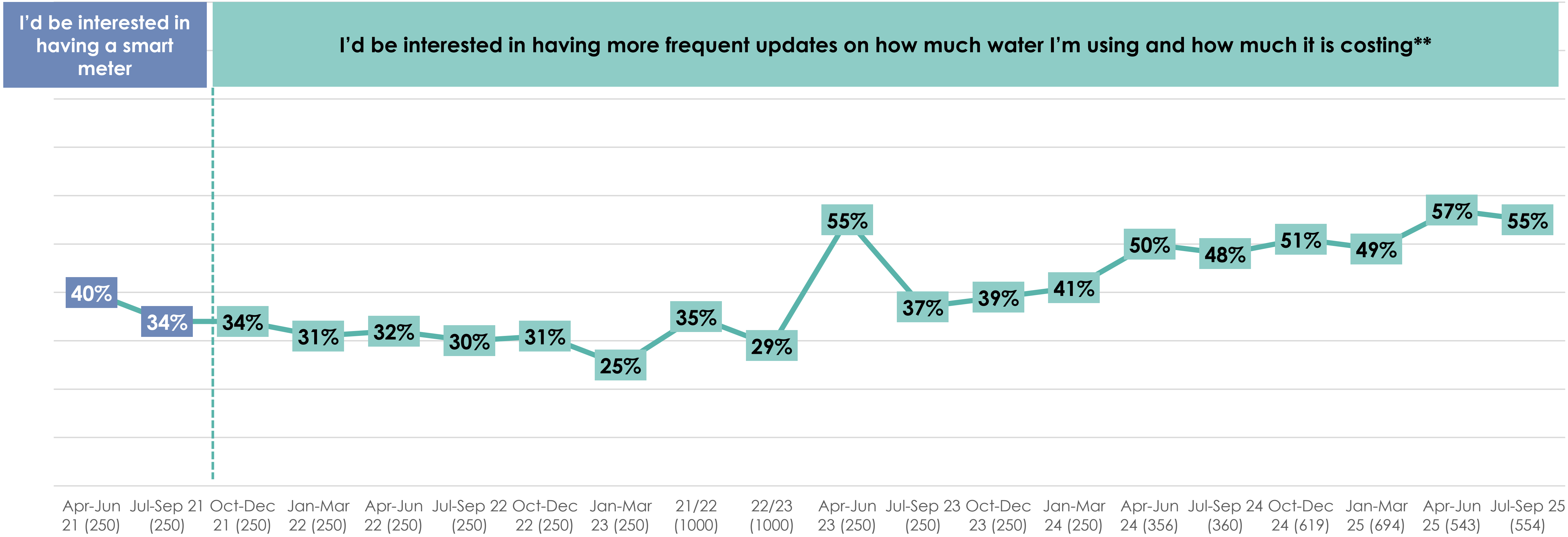


*Base: Respondents with a water meter. **Question wording changed in Q1 2025/26 from ‘I manage my water use to keep the water bill down’ New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers Methodology change in Q3 2024/25 – includes non bill payers)

The proportion of customers interested in the idea of smart metering is significantly higher than a year ago.

Those who have engaged with Wessex Water via social media and the website in the past 6 months are among the most interested groups. Interest is relatively flat across segments this Quarter – with Lifestyle Empowered notably lower than Q1.

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

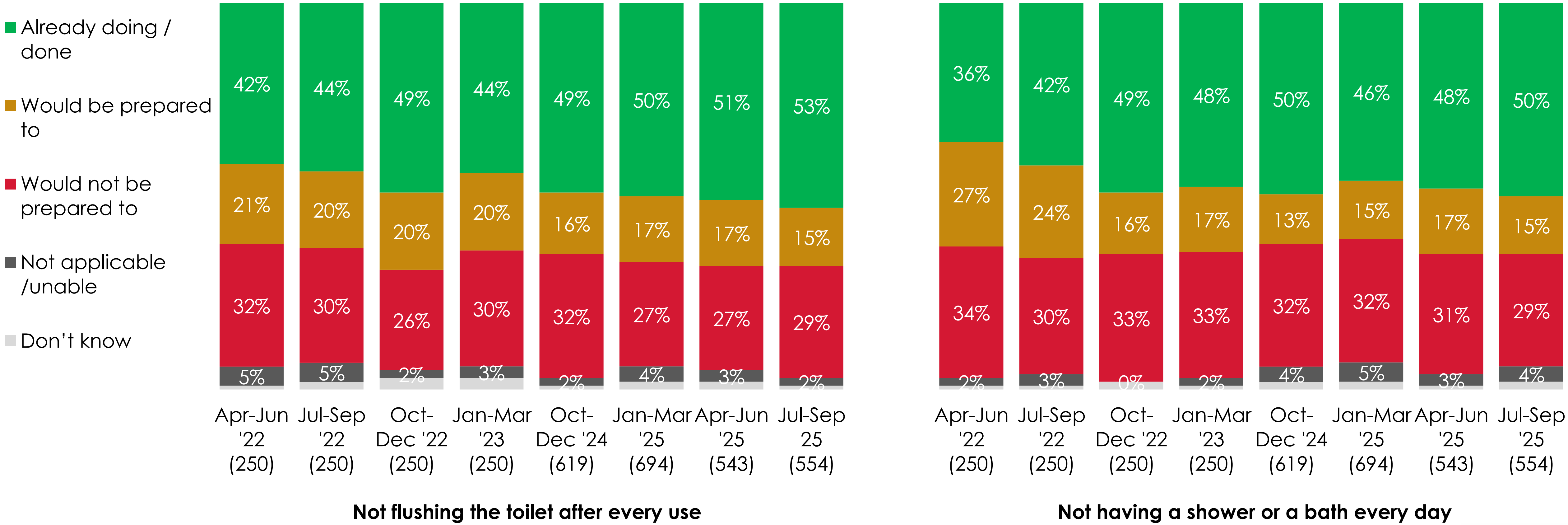


*New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers) Methodology change in Q3 2024/25: (includes non bill payers) Methodology change in Q1 2025/26: all respondents (previously only those with a water meter) ** Statement wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter"

The proportion of customers engaged in water saving behaviours remains stable this Quarter.

Resistance towards cutting daily bathing is evenly spread across the customer base, with no significant differences between groups. Lower effort water savers are significantly more likely to say they are unprepared to change reduce toilet flushing.

QF2c1. 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*



Wessex Water YTL GROUP

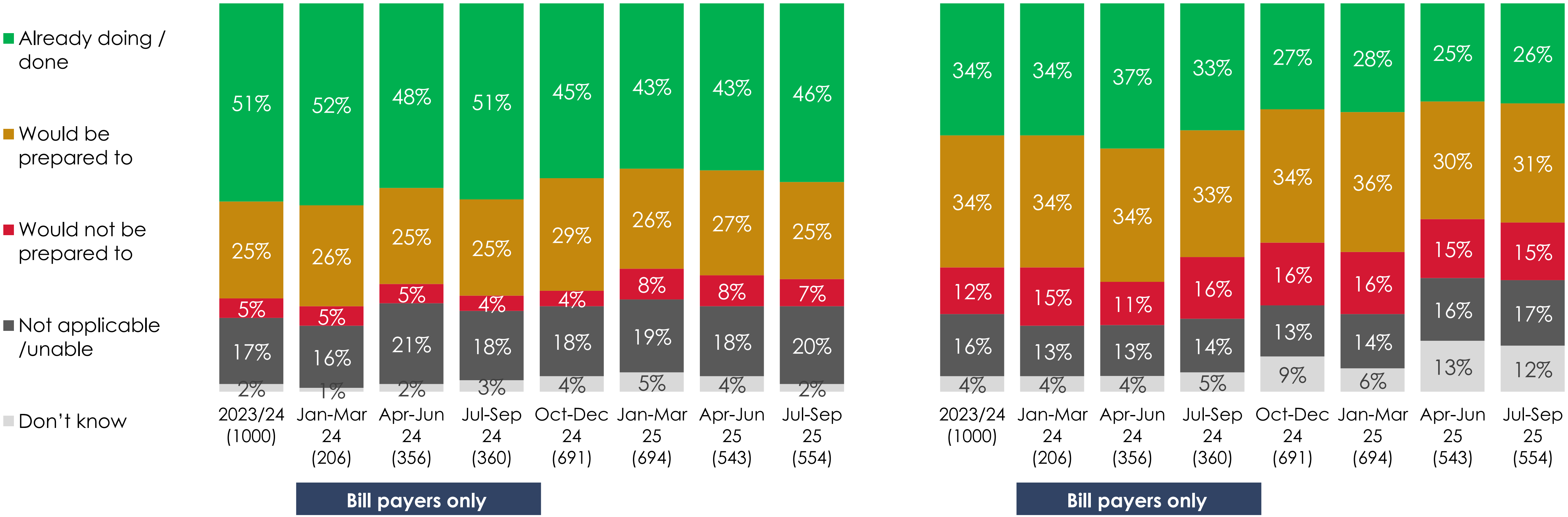
This measure was not tracked in FY 23/24, but revived as it is a Golden Question in the segmentation.

BLUE MARBLE

Over the summer months there was a small uplift in those who claimed to be using water saving devices.

Pro-Planet Advocates, Lifestyle Empowered and Convenience Cost Savers present an opportunity for uptake, with the highest reported willingness for both water butts and eco shower heads.

QF2c2. 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 respondents



Install a water butt

Fit an eco-flow head with a lower flow rate*

Wessex Water YTL GROUP

New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers Methodology change in Q3 2024/25 – includes non bill payers) *Statement wording change in Q1 2025/26 from 'fit an eco shower head with a lower flow rate'

BLUE MARBLE

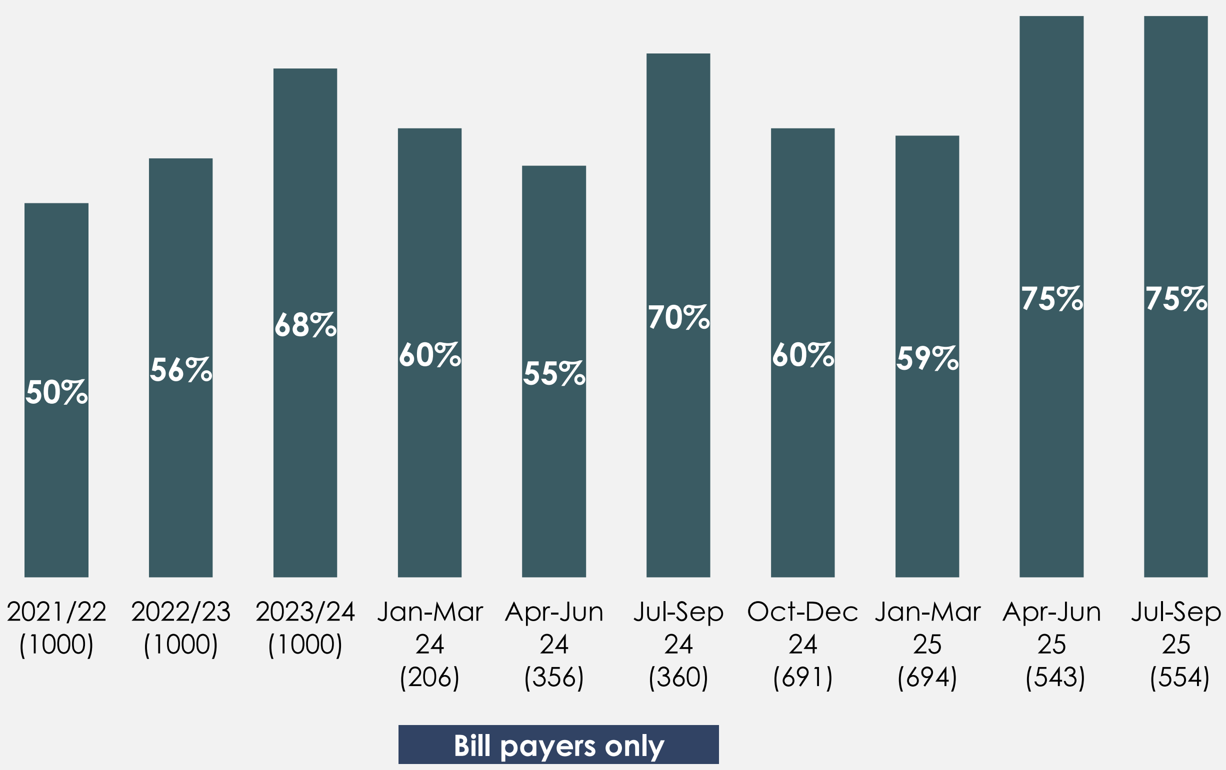
Storm overflows

BLUE MARBLE

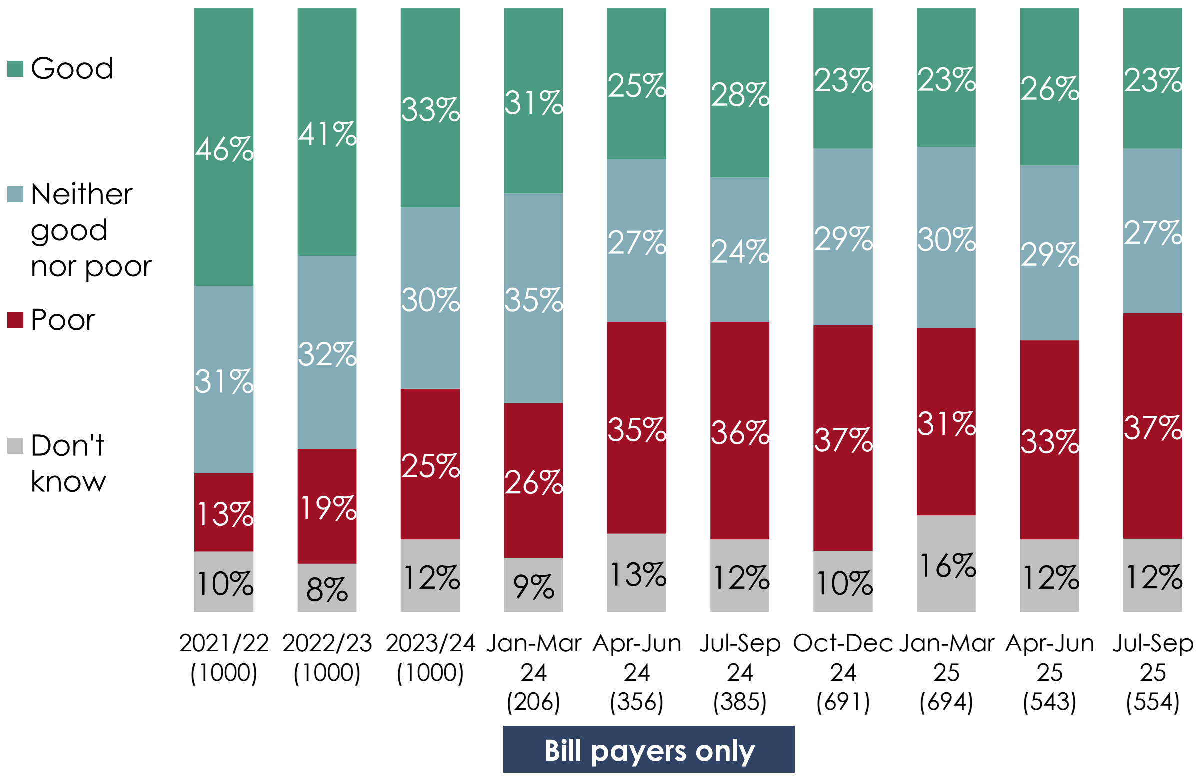
Awareness of storm overflows has held steady since the uplift observed last Quarter.

Impressions of local water quality have declined, with those who don't trust Wessex Water to responsibly manage wastewater holding the most negative impressions (88% rated 'poor'). Regionally, customers in Bristol hold the most negative impressions (and lowest satisfaction).

QF1c. Have you heard anything about storm / sewer overflows 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*



Wessex Water YTL GROUP

New methodology: Customer sample used from Q1 2024-2025 excludes non bill payers. Methodology change in Q3 2024/25 now includes non bill payers.
*Question wording updated in Q1 2025/26 from 'Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?'

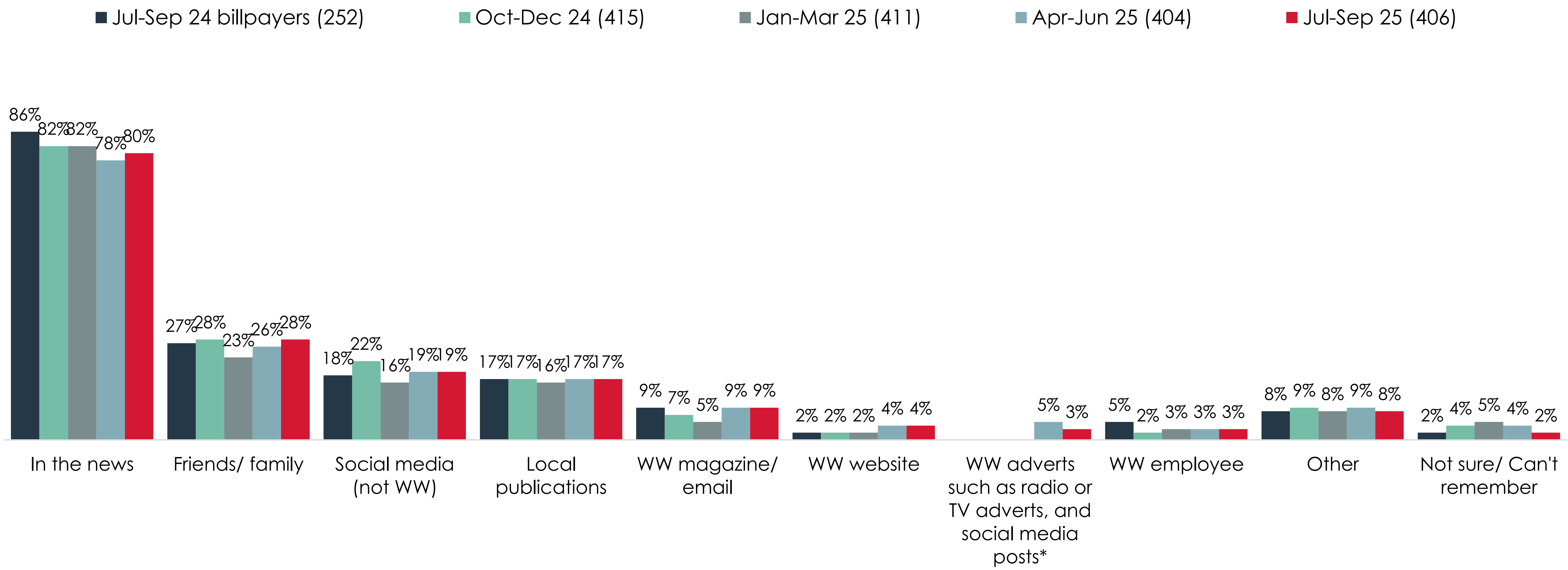
BLUE MARBLE

News coverage and personal circles continue to be primary channels for hearing about storm overflows.

Those with a negative company view and low trust in wastewater handling are significantly more likely than their more positive counterparts to have heard about releases via discussions within their friends and family – even more so than in Q1, with over half now citing this source.

QF1e. And where did you hear about this topic (% who have used this source)?

Base: Those aware of storm overflows



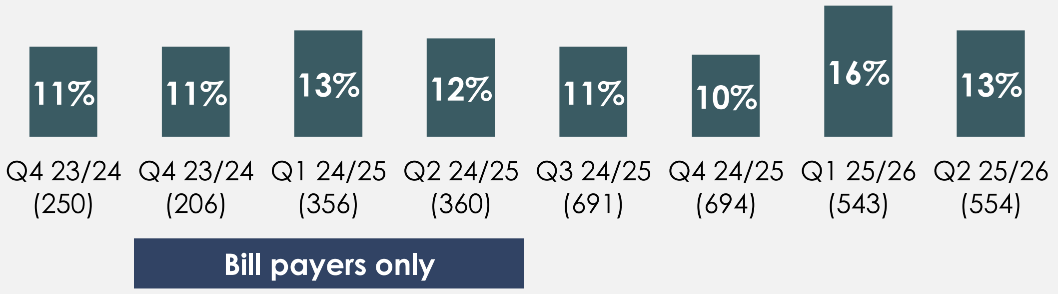
New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers Methodology change in Q3 2024/25 – includes non bill payers) *New statement introduced in Q1 2025/26 – 'Wessex Water adverts such as radio or TV adverts, and social media posts'

Awareness of Wessex Water's efforts to reduce storm overflows remains low.

Wessex Water's magazines and emails become the primary channel this Quarter, overtaking the news which declined by 15pts since Q1.

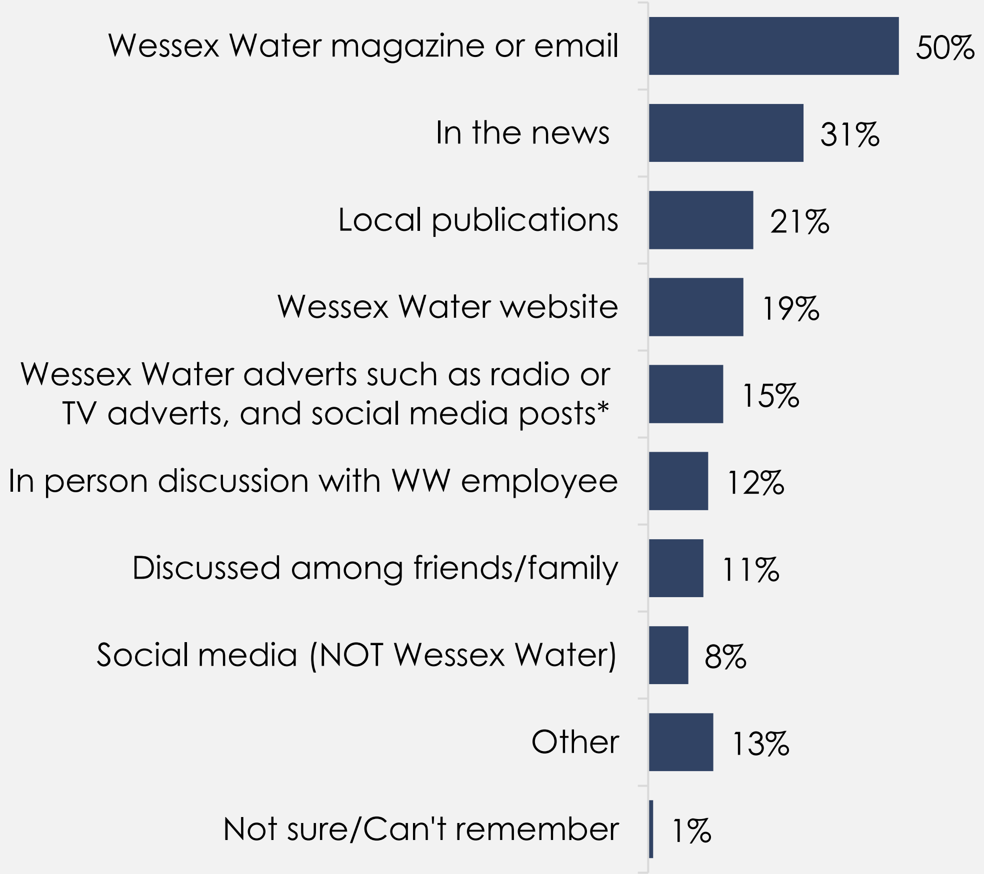
QF1g. Have you heard or seen any information about what Wessex Water is doing to reduce storm overflows into rivers or the sea?

Base: All respondents



QF1h And where did you hear about this topic?

Base: All aware of Wessex Water activity to reduce storm overflows (70)



New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers) Methodology change in Q3 2024/25 – includes non bill payers) *New statement introduced in Q1 2025/26 – 'Wessex Water adverts such as radio or TV adverts, and social media posts'

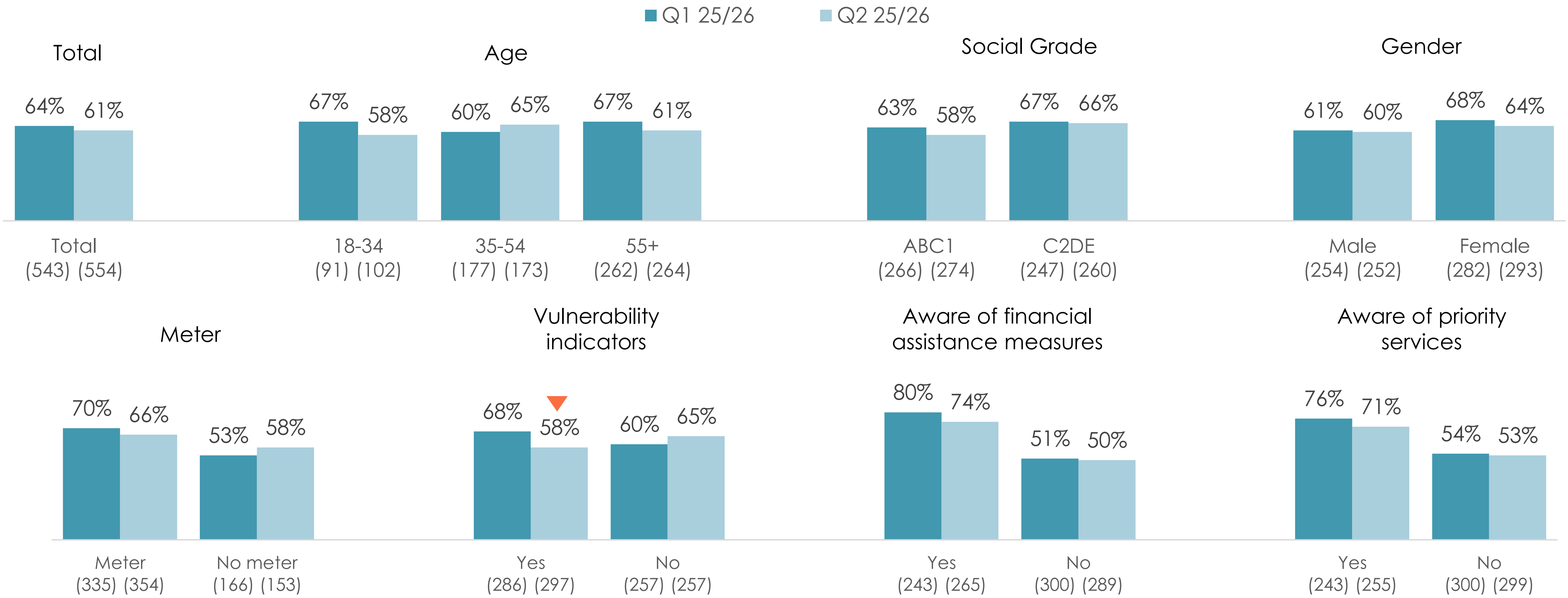
Appendix

BLUE MARBLE

Overall satisfaction with Wessex Water - by key groups Q2 2025/2026.

Satisfaction has significantly declined amongst those who have indicated that they/ their households have a vulnerability (vs last Quarter).

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



▲ Sig higher than Q1
▼ Sig lower than Q1

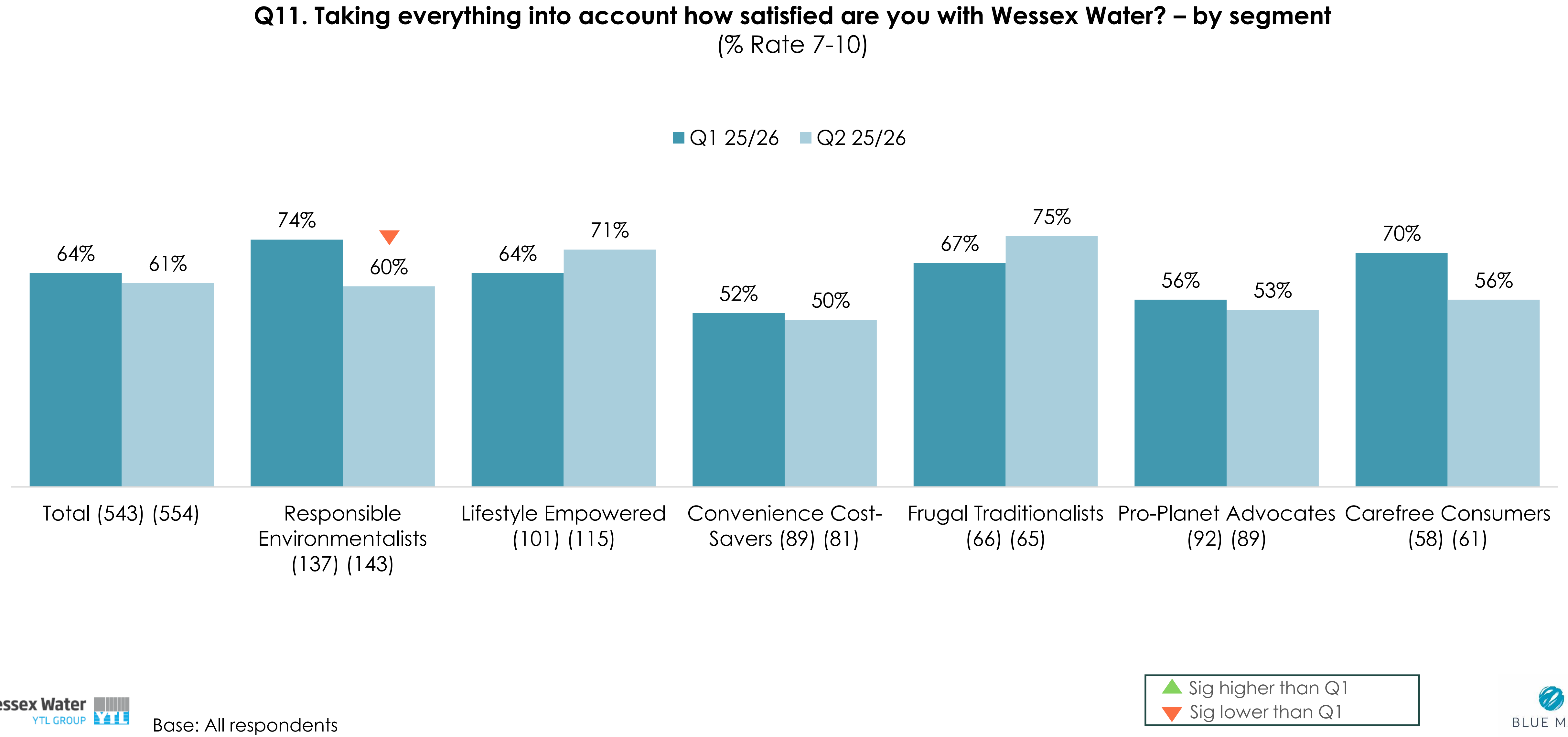
Base: All respondents

Wessex Water YTL GROUP

BLUE MARBLE

Overall satisfaction with Wessex Water - by segments Q2 2025/2026.

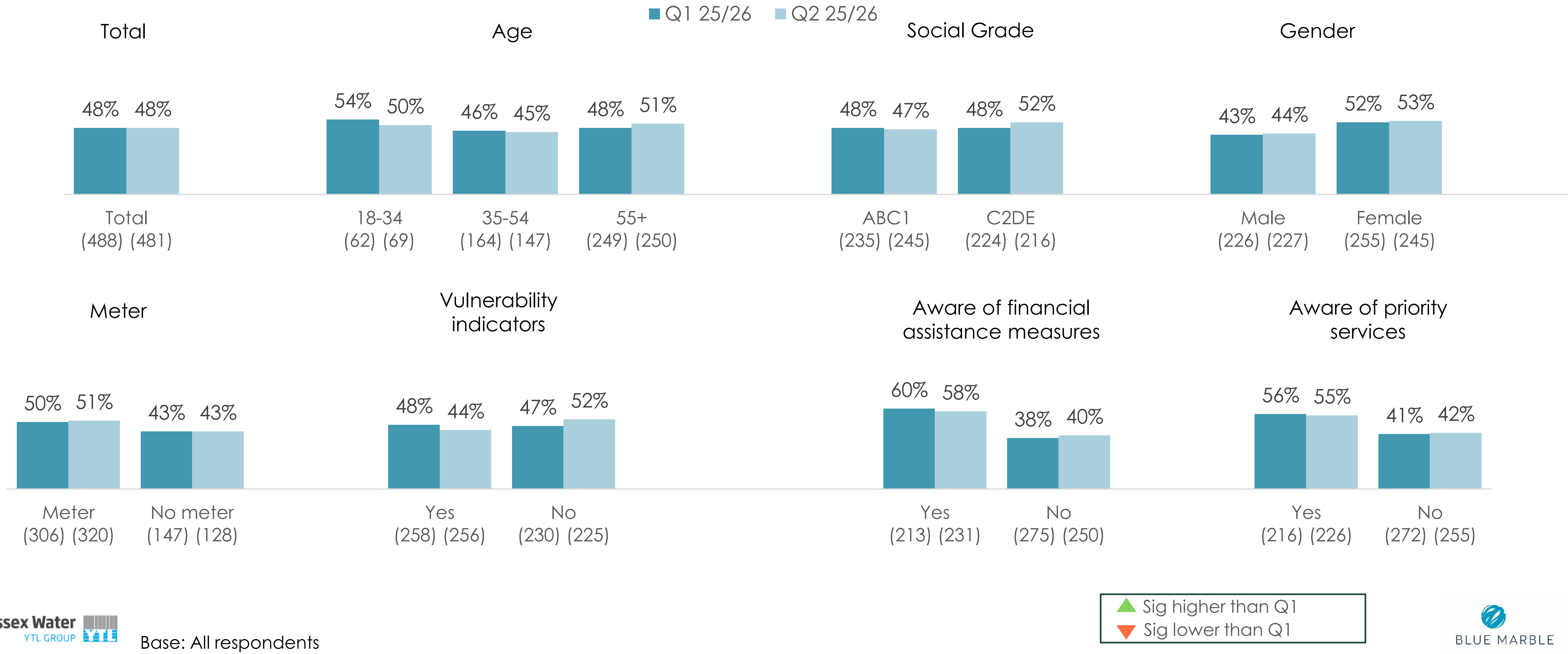
Responsible Environmentalists less likely to feel satisfied with Wessex Water's overall performance vs the previous Quarter.



Satisfaction with value for money - by key groups Q2 2025/2026.

No significant changes within subgroups for satisfaction with value for money.

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)*

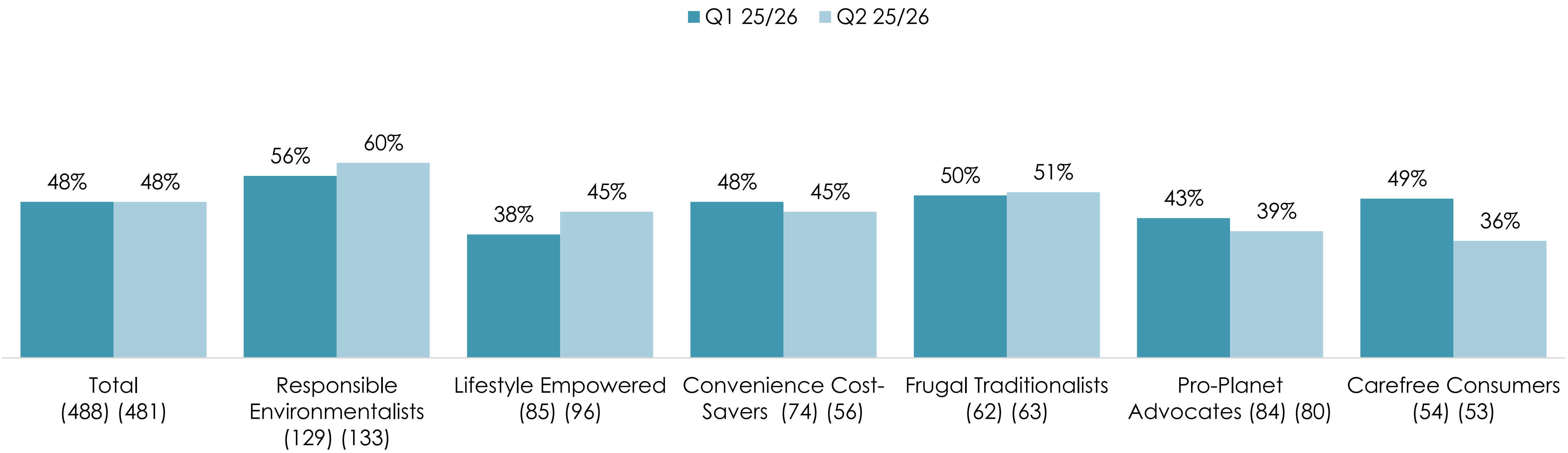


Base: All respondents

Satisfaction with value for money - by segments Q2 2025/2026.

Satisfaction with value for money has fallen among Carefree Consumers this Quarter.

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)*



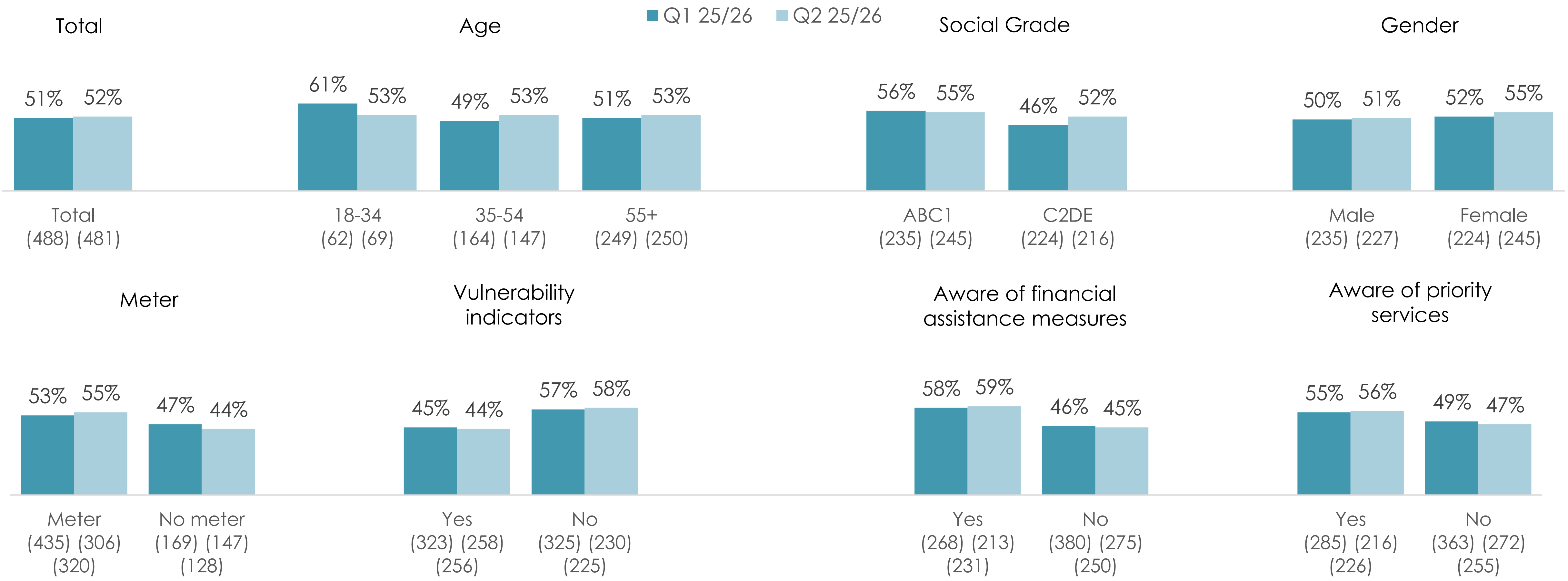
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Bill affordability - by key groups Q2 2025/2026.

There are no significant differences compared to the last Quarter 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)



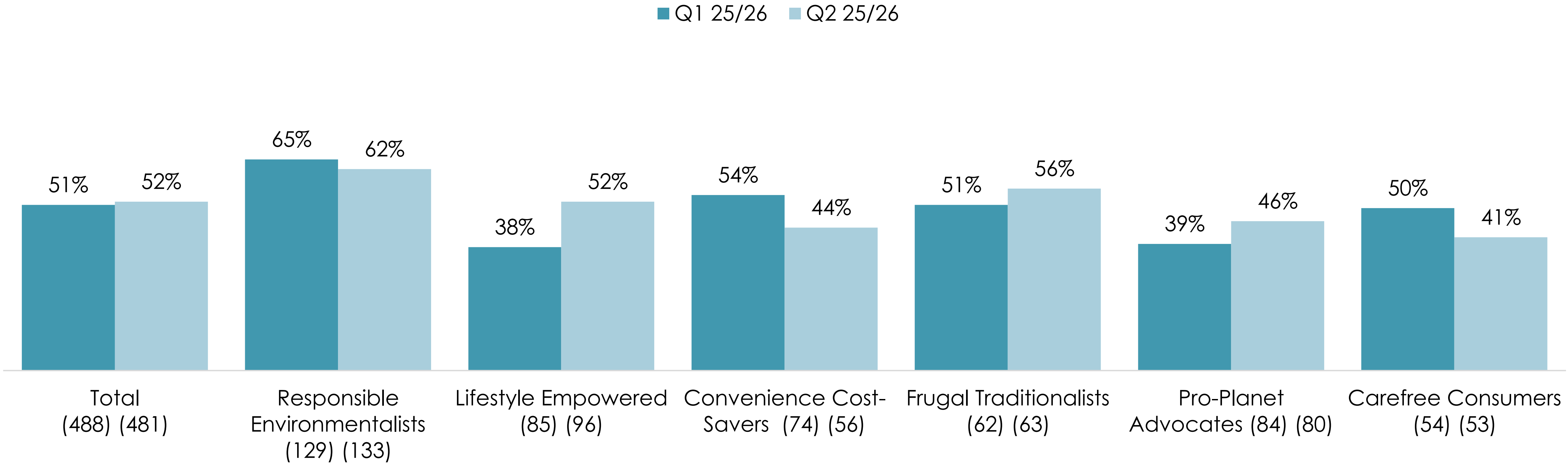
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Bill affordability - by segments Q2 2025/2026.

More Lifestyle Empowered customers agree that bills are affordable vs the previous Quarter – but movement not significant.

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)



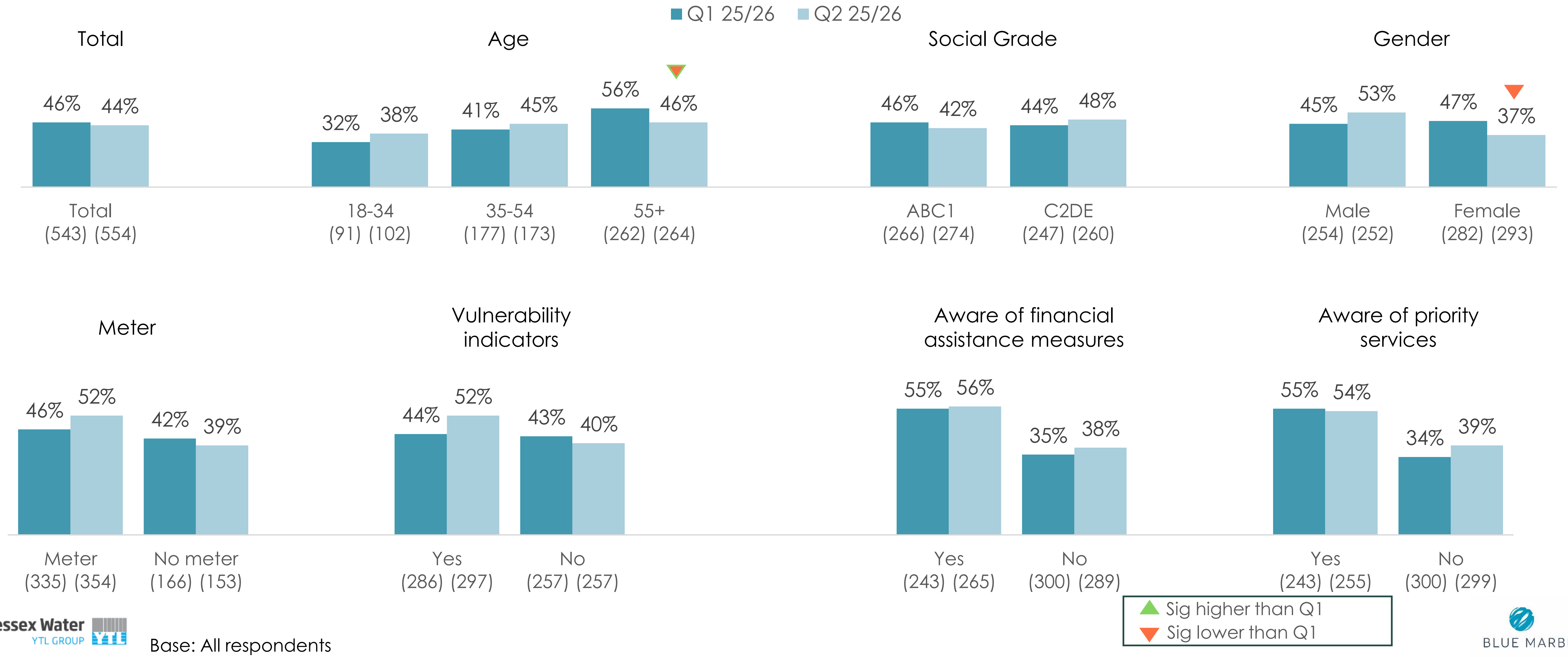
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Knowledge about Wessex Water - by key groups Q2 2025/2026.

Fewer over 55s and women feel knowledgeable about Wessex Water vs the Q1.

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)

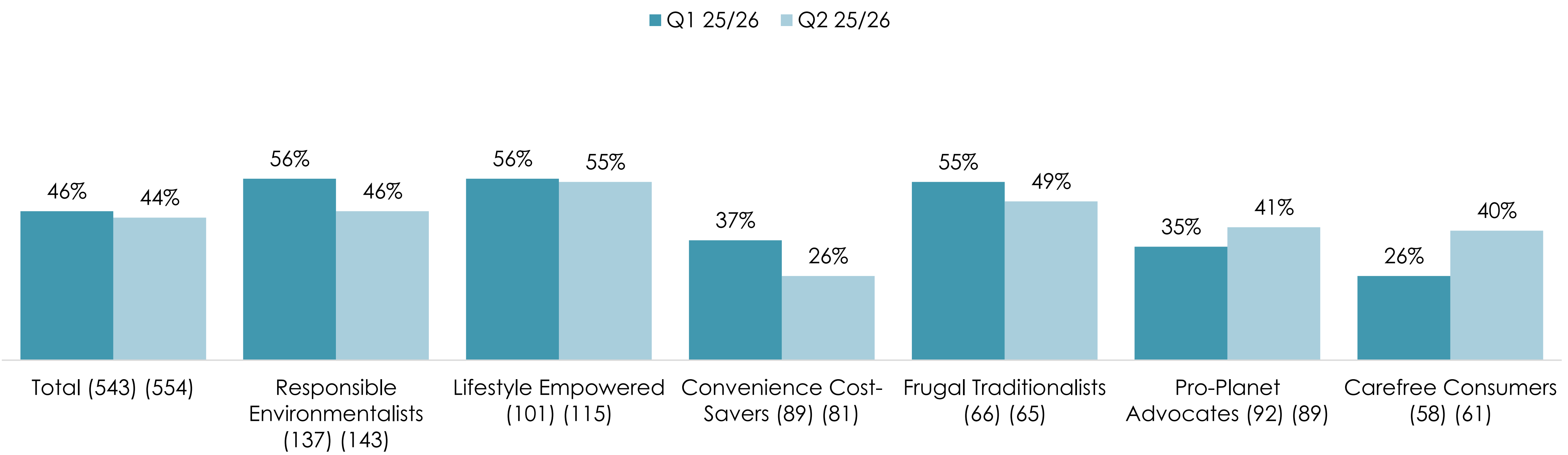


Base: All respondents

Knowledge about Wessex Water - by segments Q1 2025/2026.

More Carefree Consumers this Quarter feel knowledgeable about Wessex Water, but movement is not significant.

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)



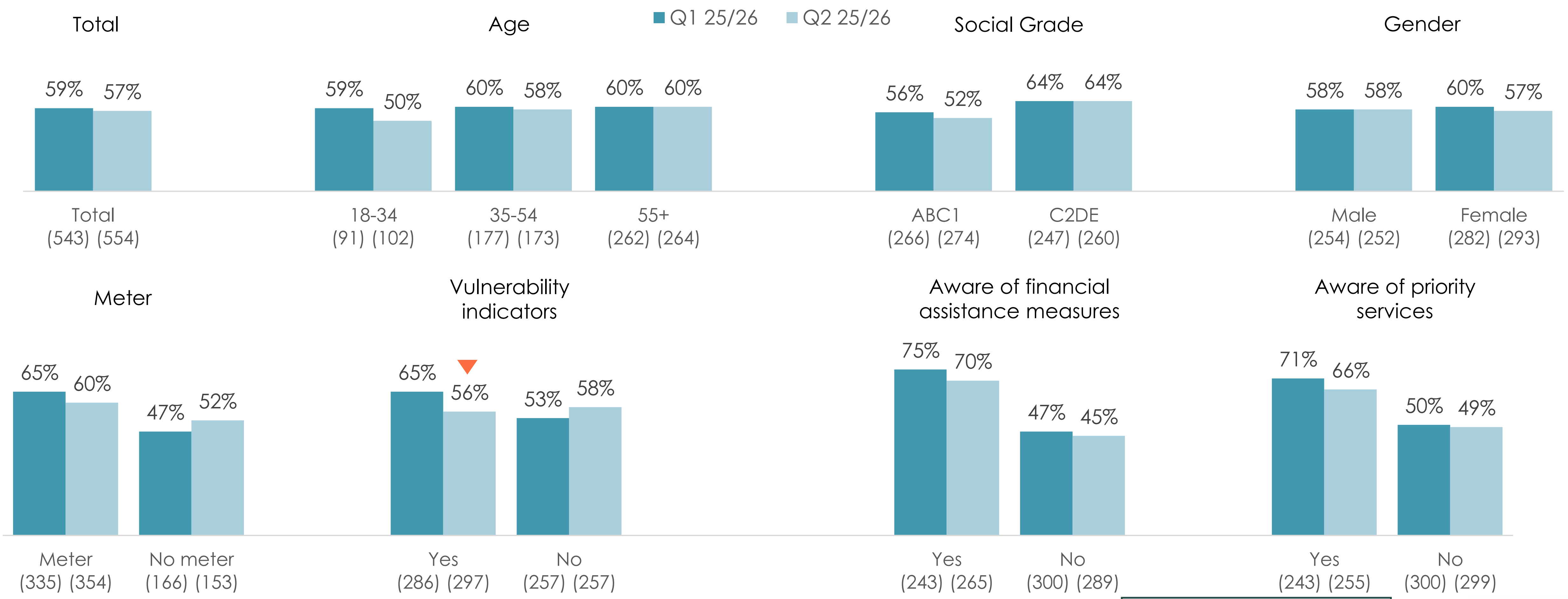
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Opinions of Wessex Water - by key groups Q2 2025/2026.

Under 34s and those with a meter are less likely to feel positive about Wessex Water vs the previous Quarter, but these movements are not significant. There is a significantly decline positivity amongst those who have a vulnerability.

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



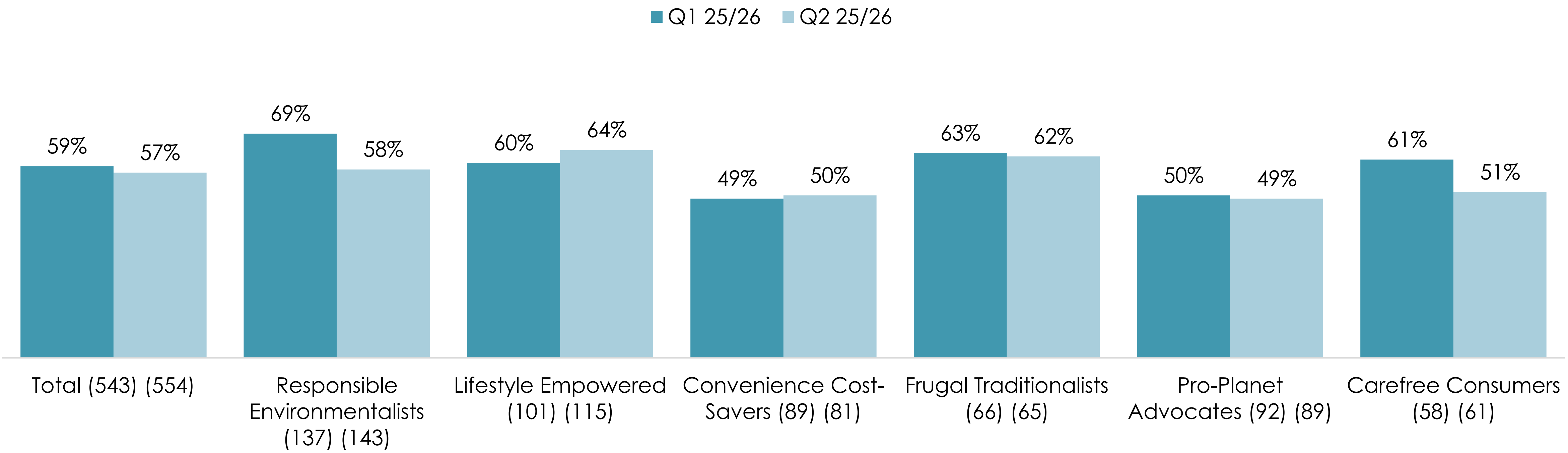
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Opinions of Wessex Water - by segments Q2 2025/2026.

Positive sentiment towards Wessex Water has declined amongst Responsible Environmentalist and Carefree Consumers, but movements are not significant.

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



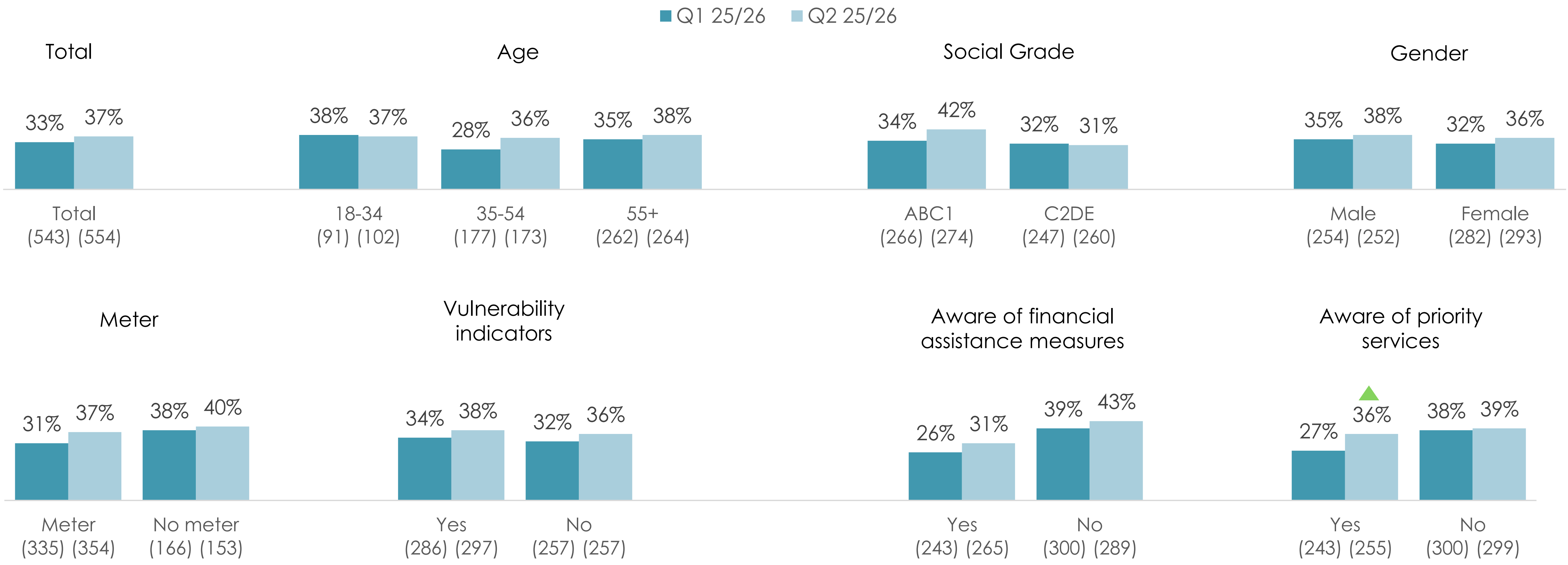
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Impressions of water quality - by key groups Q2 2025/2026.

35-54s are directionally more likely to have a poor impression of bodies of water in their area, bringing them in line with the other age groups. There's also a directional increase in ABC1 households who have a poor impression. However, these movements are not significant.

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)

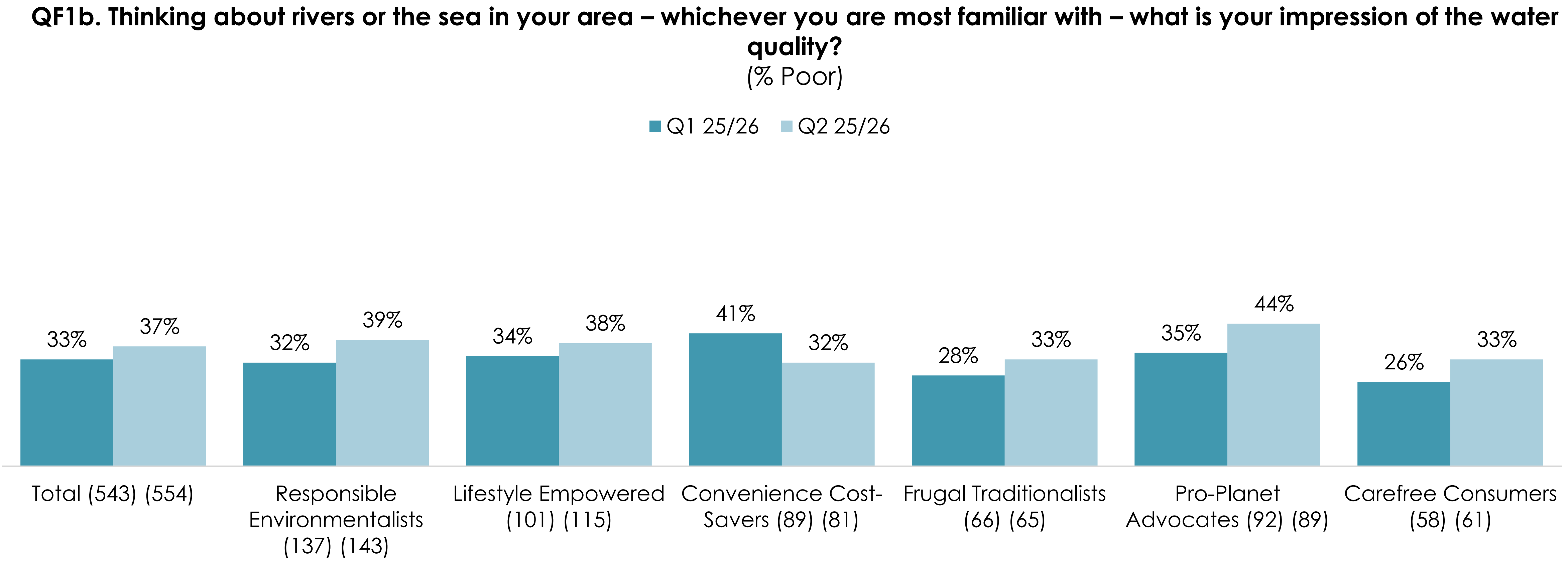


▲ Sig higher than Q1
▼ Sig lower than Q1

Base: All respondents

Impressions of water quality - by segments Q2 2025/2026.

Pro-Planet Advocates are slightly more likely to have a bad impression of water quality, and there is a decline in Convenience Cost Savers who feel this way. However movements are not significant.



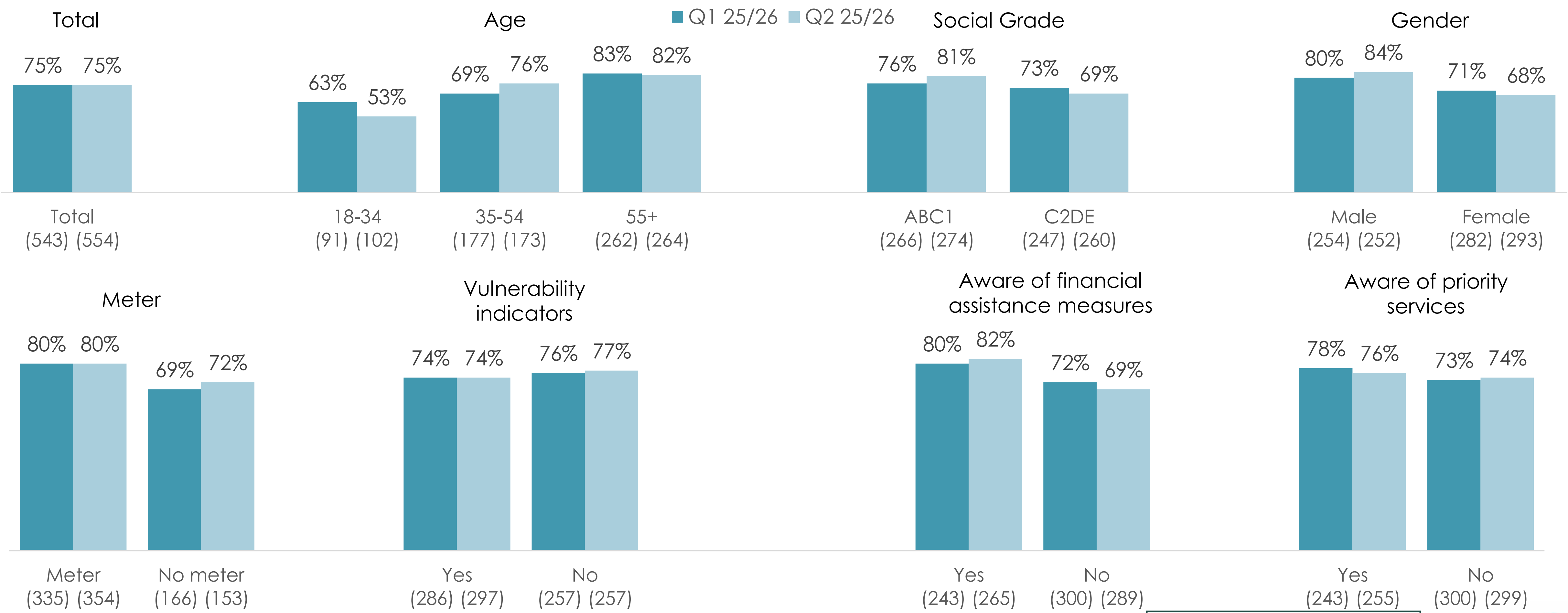
Sig higher than Q1
Sig lower than Q1

Base: All respondents

Awareness of Storm Overflows - by key groups Q2 2025/2026.

Awareness of storm overflow releases has declined further amongst under 34s in the latest Quarter.

QF1c. Have you heard anything about storm/sewer overflows into rivers or the sea before?*
(% Aware(yes))

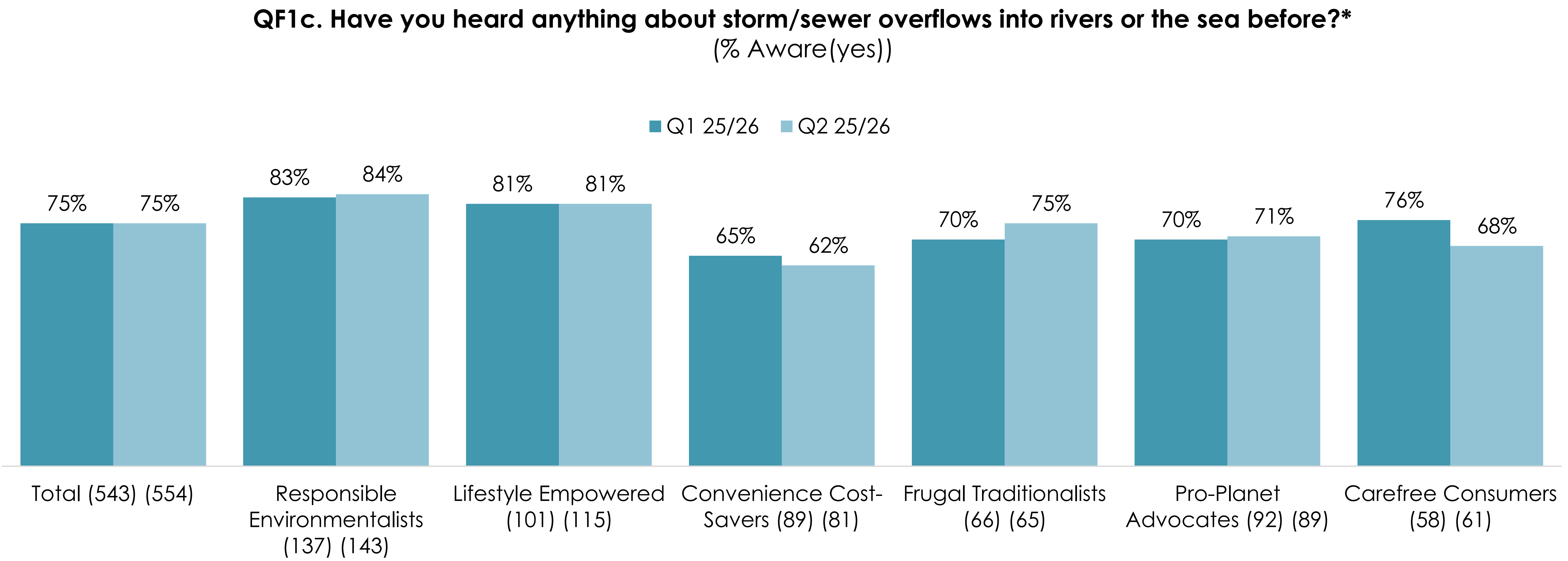


Base: All respondents. *Question wording updated in Q1 2025/26, previously: Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?*

Sig higher than Q1
Sig lower than Q1

Awareness of Storm Overflows - by segments Q2 2025/2026

This awareness rises significantly from last Quarter for most segments, besides Responsible Environmentalists and Convenience Cost-Savers.



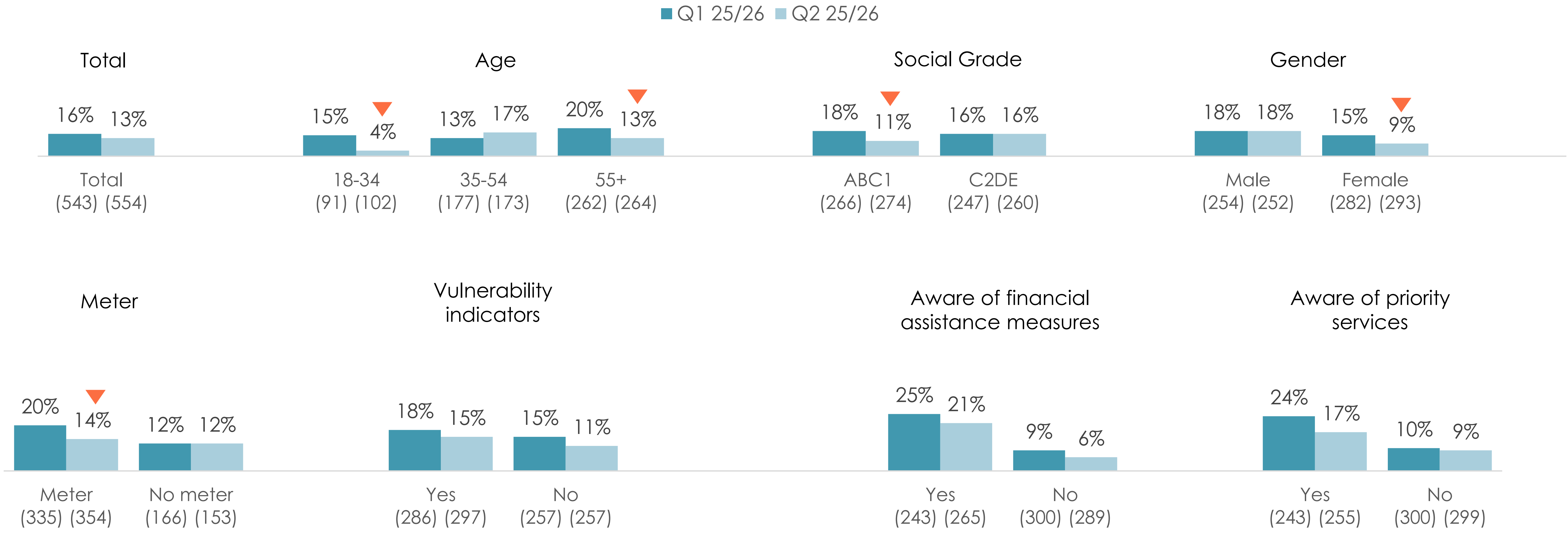
Base: All respondents. *Question wording updated in Q1 2025/26, previously: Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?*

Sig higher than Q1
Sig lower than Q1

Awareness of Wessex Water's activity to reduce Storm Overflows - by key groups Q2 2025/2026.

18-34s, 55+s, ABC1s, females and those with a meter are less likely to be aware about Wessex Water's efforts in reducing storm overflows compared to Q1.

QF1g. 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 Q1
Sig lower than Q1

Base: All respondents

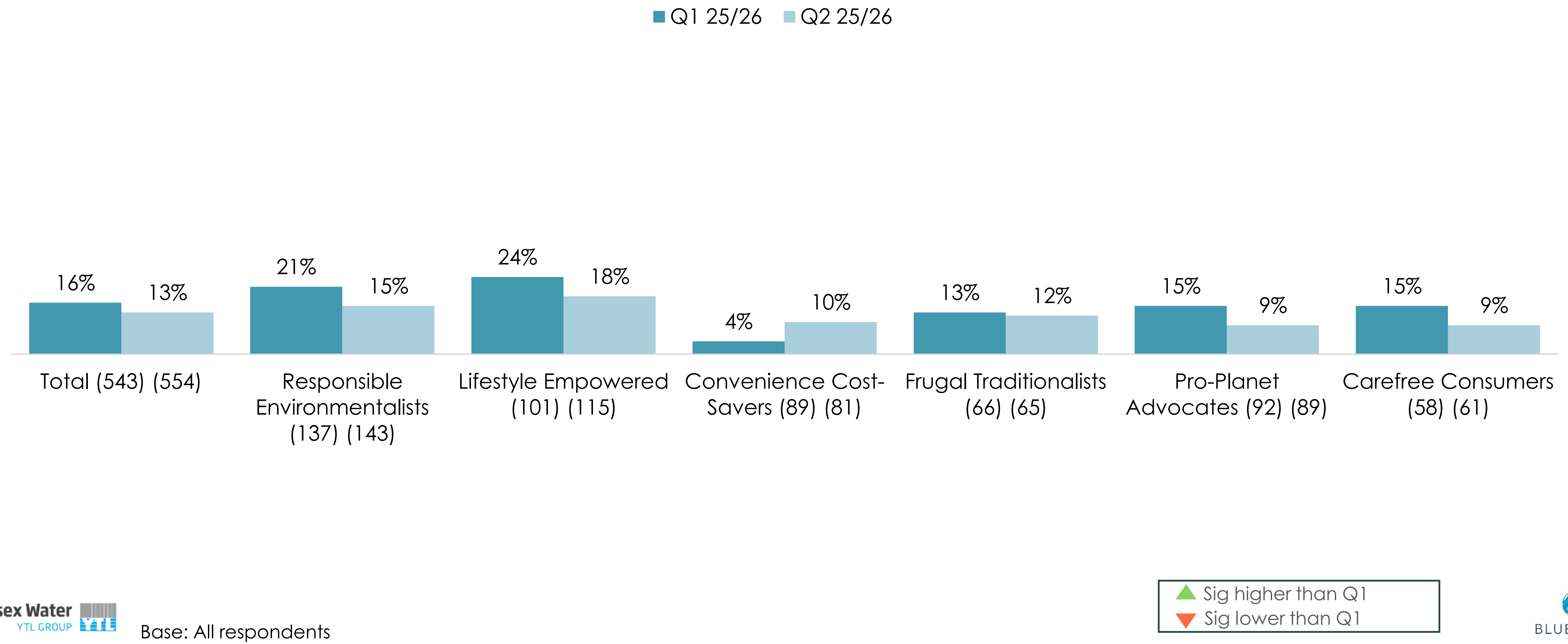
Wessex Water YTL GROUP

BLUE MARBLE

Awareness of Wessex Water's activity to reduce use of Storm Overflows - by segment Q2 2025/2026.

No significant difference in awareness of Wessex Water's efforts to reduce CSOs – though Convenience Cost-Savers are twice as likely to be aware (though this is not significant due to base size).

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



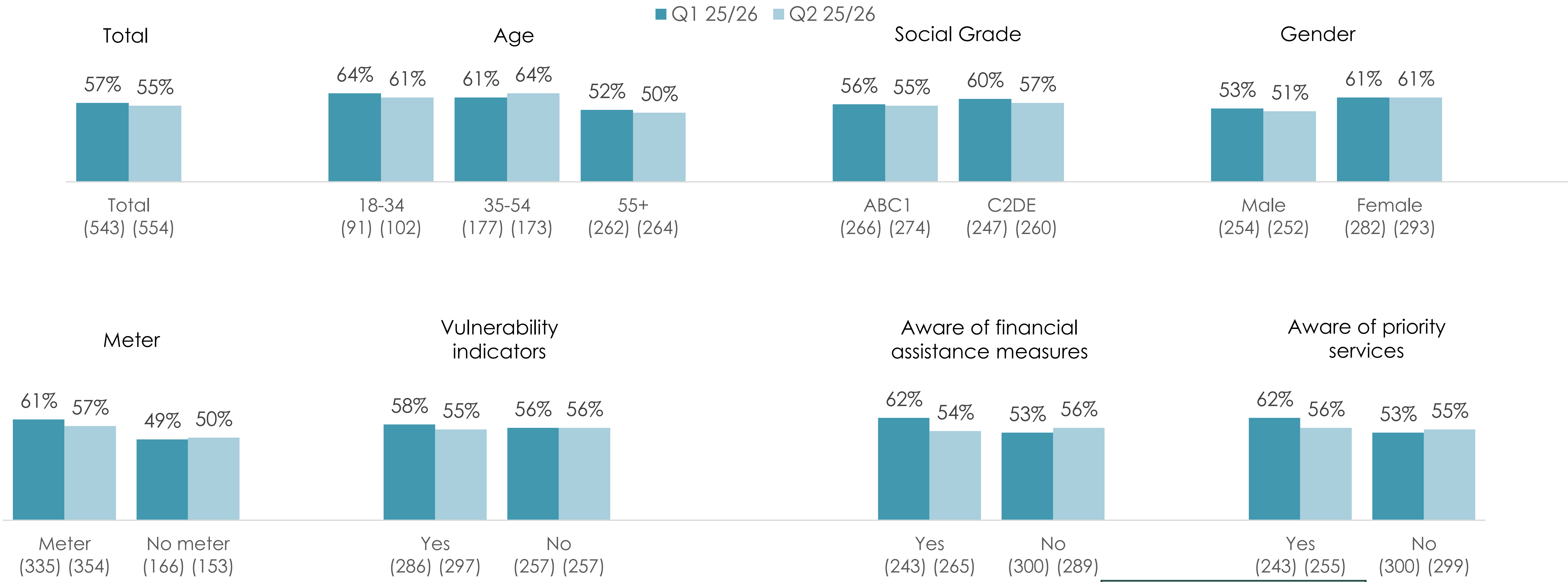
Base: All respondents

Interest in the principle of smart water meters - by key groups Q2 2025/2026.

Interest in the concept of smart meters is consistent to Q1 across subgroups.

QF1. 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 Q1
Sig lower than Q1

Wessex Water YTL GROUP

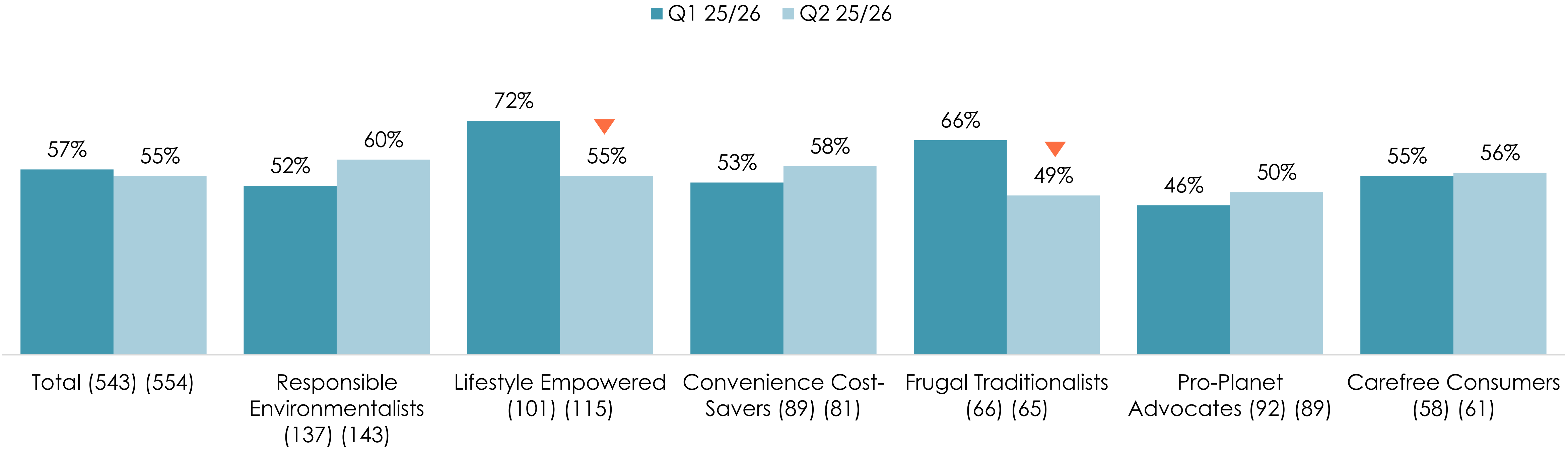
Base: All respondents

BLUE MARBLE

Interest in the principle of smart water meters - by segments Q2 2025/2026.

Lifestyle Empowered and Frugal Traditionalists are significantly less likely interested in the benefits of smart water meters versus last Quarter.

QF1. 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 Q1
Sig lower than Q1

Wessex Water YTL GROUP

Base: All respondents

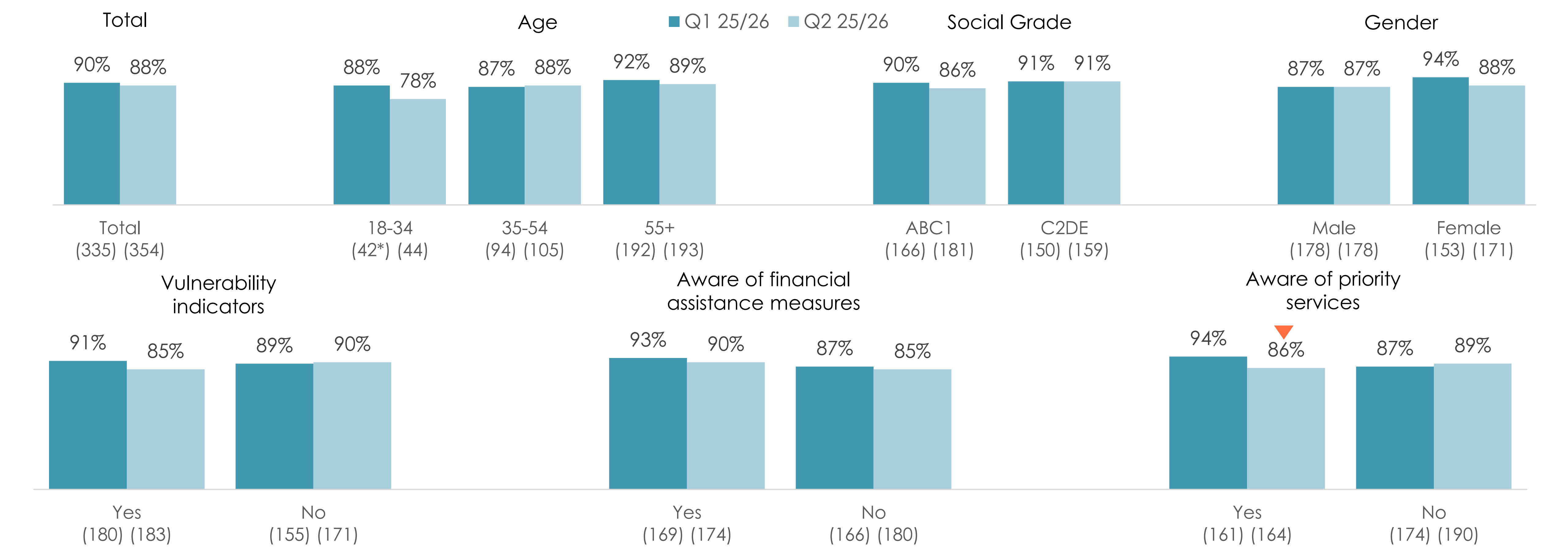
BLUE MARBLE

Managing water use to keep bills down - by key groups Q2 2025/2026.

Those aware of priority services are significantly less likely to agree that they make an effort to keep water usage down, but otherwise scores across subgroups are consistent across waves.

QF1. How much would you agree or disagree with the following statements? : "I make an effort to keep my water usage down"*

(% Strongly/tend to agree (7-10), among those who have a water meter)

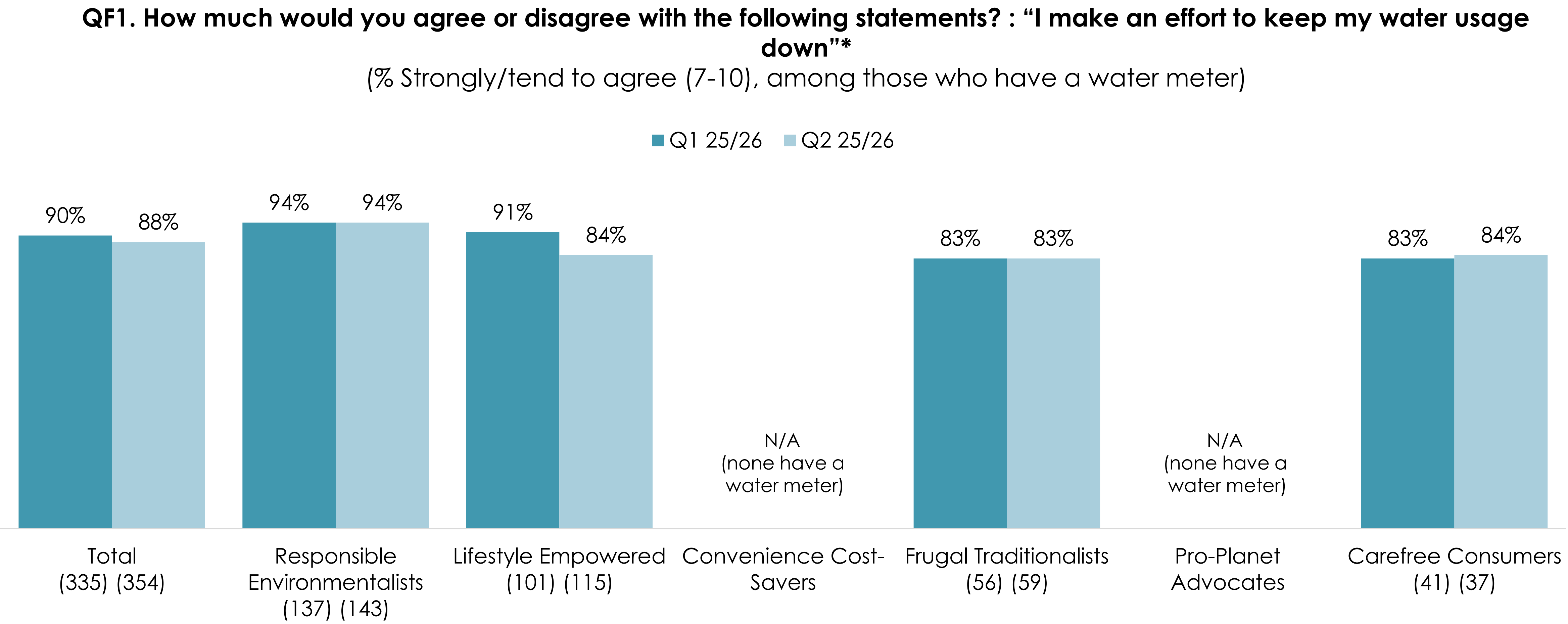


Base: All respondents. *Statement wording changed in Q1 2025/26 from 'I manage my water use to keep the water bill down'

Sig higher than Q1
Sig lower than Q1

Managing water use to keep bills down - by segments Q2 2025/2026.

The vast majority of customers claim to manage water use to keep bills down, though the proportion of Lifestyle Empowered customers who claim this is marginally lower in the latest wave.



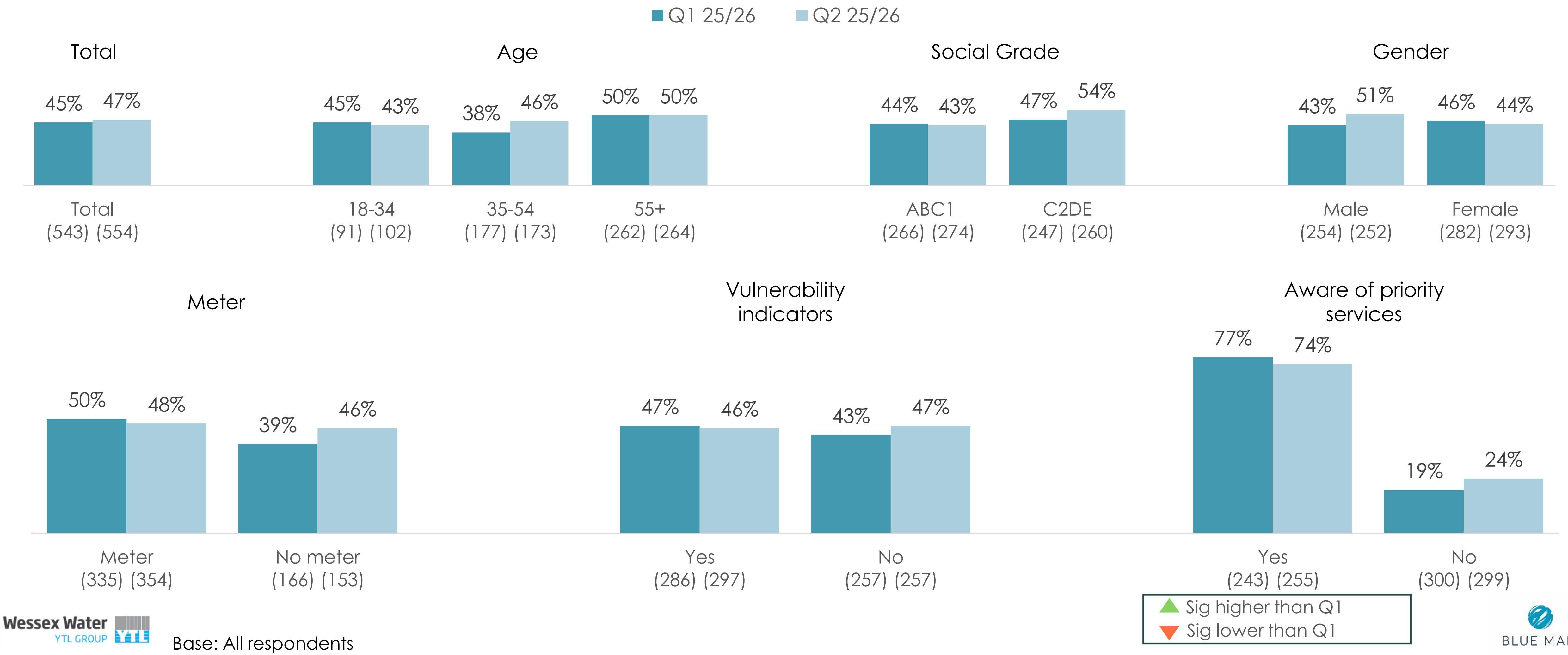
Base: All respondents. *Question wording changed in Q1 2025/26 from 'I manage my water use to keep the water bill down'

Sig higher than Q1
Sig lower than Q1

Awareness of financial aid provided by Wessex Water - by key groups Q2 2025/2026.

Awareness of financial assistance provided by Wessex Water is largely similar across demographics, but there is a directional increase in men who are aware of this aid.

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

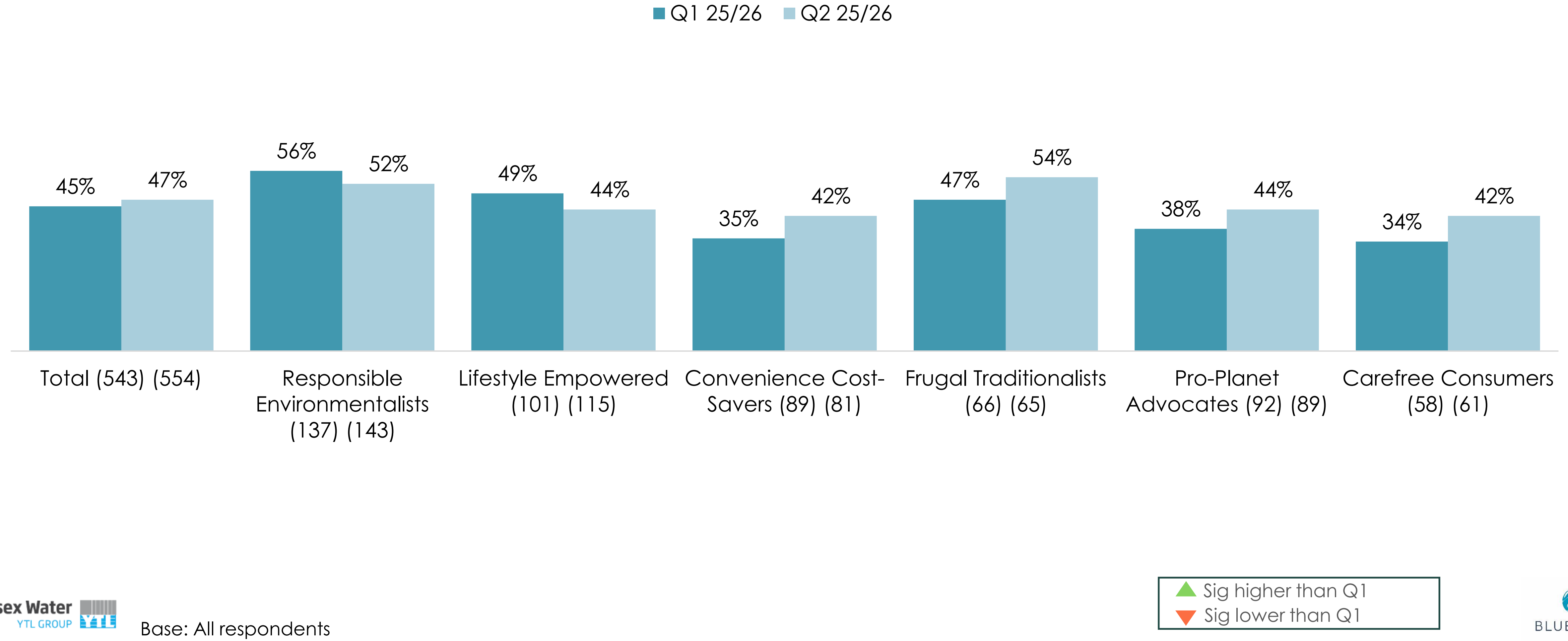


Base: All respondents

Awareness of financial aid provided by Wessex Water - by segments Q2 2025/2026.

Scores across segments hold steady, but there are directional increases in the proportion of Carefree Consumers and Conveniences Cost-Savers who are 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)



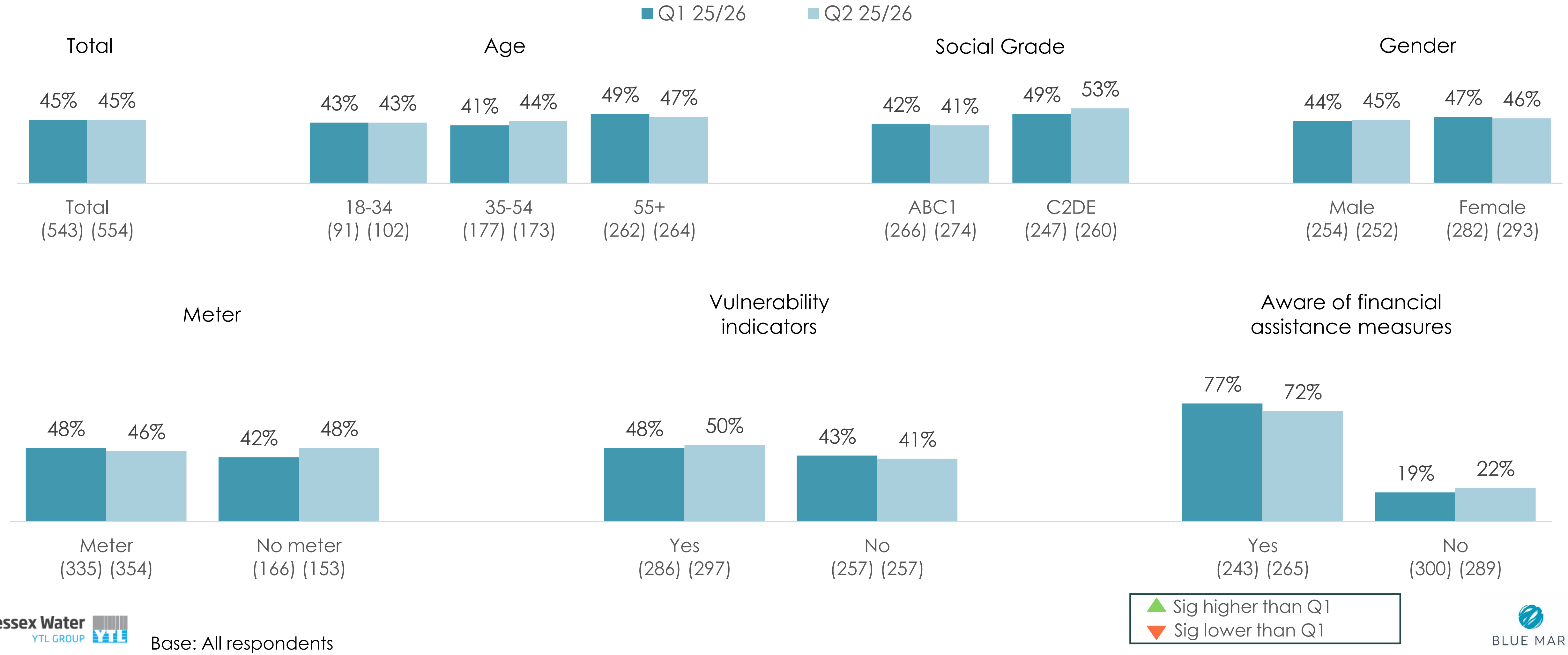
Base: All respondents

Awareness of priority services provided by Wessex Water - by key groups Q2 2025/2026.

Awareness of priority services by subgroup holds relatively steady compared to the previous wave.

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)

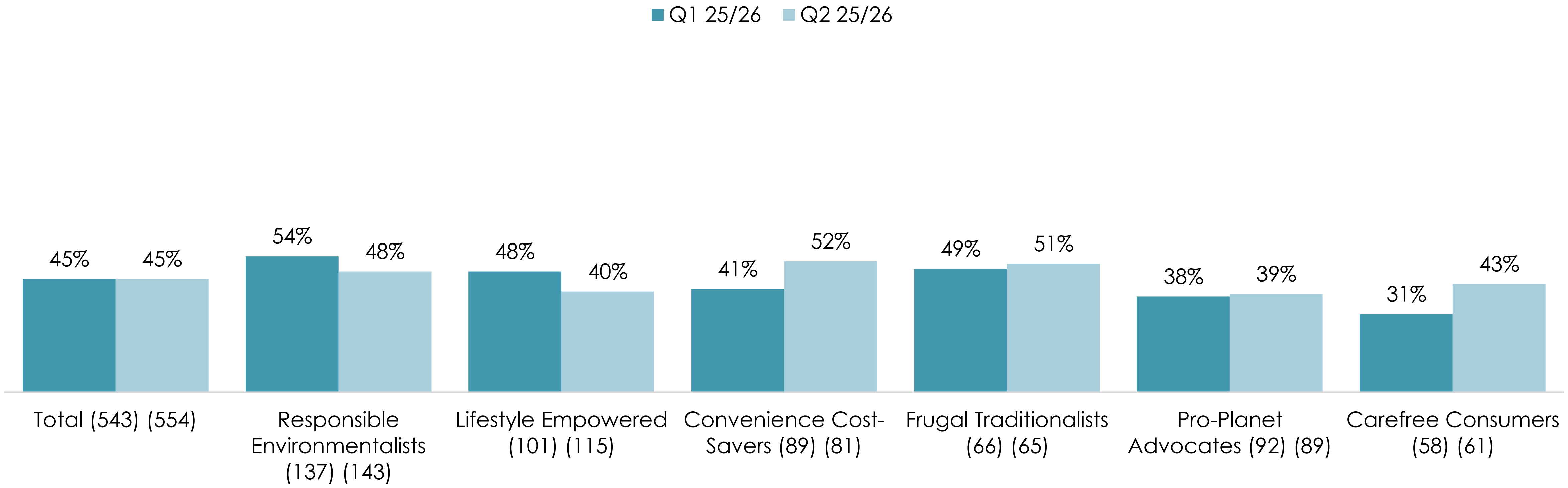


Base: All respondents

Awareness of priority services provided by Wessex Water - by segments Q2 2025/2026.

Convenience Cost-Savers and Carefree Consumers more likely to be aware of extra support provided by Wessex Water in Q2 vs Q1, but not significantly so.

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)



Sig higher than Q1
Sig lower than Q1

Base: All respondents

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