Wessex Water
YTL GROUP

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Image Tracker

2021-22 Annual presentation

Including appendix

18th May 2022

Priorities | Performance | Cost of living | Environment | Water use | Communication

A new tracker for 2021-25

Mixed mode telephone and online panel interviewing

Interviewing split **50:50 between telephone and online panel,** within all key quota groups.

Sample definition

All adults 18+ living in the Wessex Water region. Both **bill payers and non bill payers**

- Interviewing **spread across all months of the year** (c.80 interviews per month).
- Demographic profile weighted to **match ONS** (2019-20) for Wessex Water region
- Supply areas represented in actual proportions

600 interviews per year in **Wessex** supply area

300 interviews per year in **Bristol** supply area

100 interviews per year in **Bournemouth** supply area

Questionnaire: Reviewed and extensively developed to reflect objectives for 2021-5, including flexible section

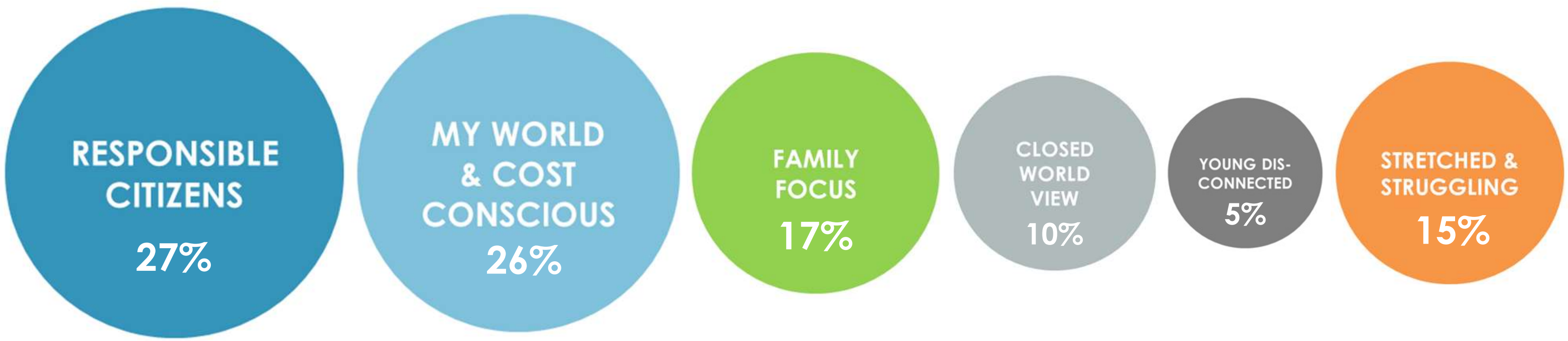
Customers are assigned into one of 6 segments

The segments are based on responses to three questions:

	1. Responsible Citizens	2. My World & Cost Conscious	3. Family Focus	4. Closed World View	5. Young Disconnected*	6. Stretched & Struggling
Water saving	HIGH	HIGH	LOW	HIGH	LOW	HIGH OR LOW
Community	HIGH	HIGH	HIGH	LOW	LOW	LOW
Bill affordability	HIGH	LOW	HIGH OR LOW	HIGH	HIGH	LOW

The segments vary in size, with the largest (Responsible Citizens) being around 5 times the size of the smallest (Young Disconnected).

The size of the segments should to be taken into account when considering the size of opportunity each represents.



% of all Wessex Water customers in each segment – 2021-2

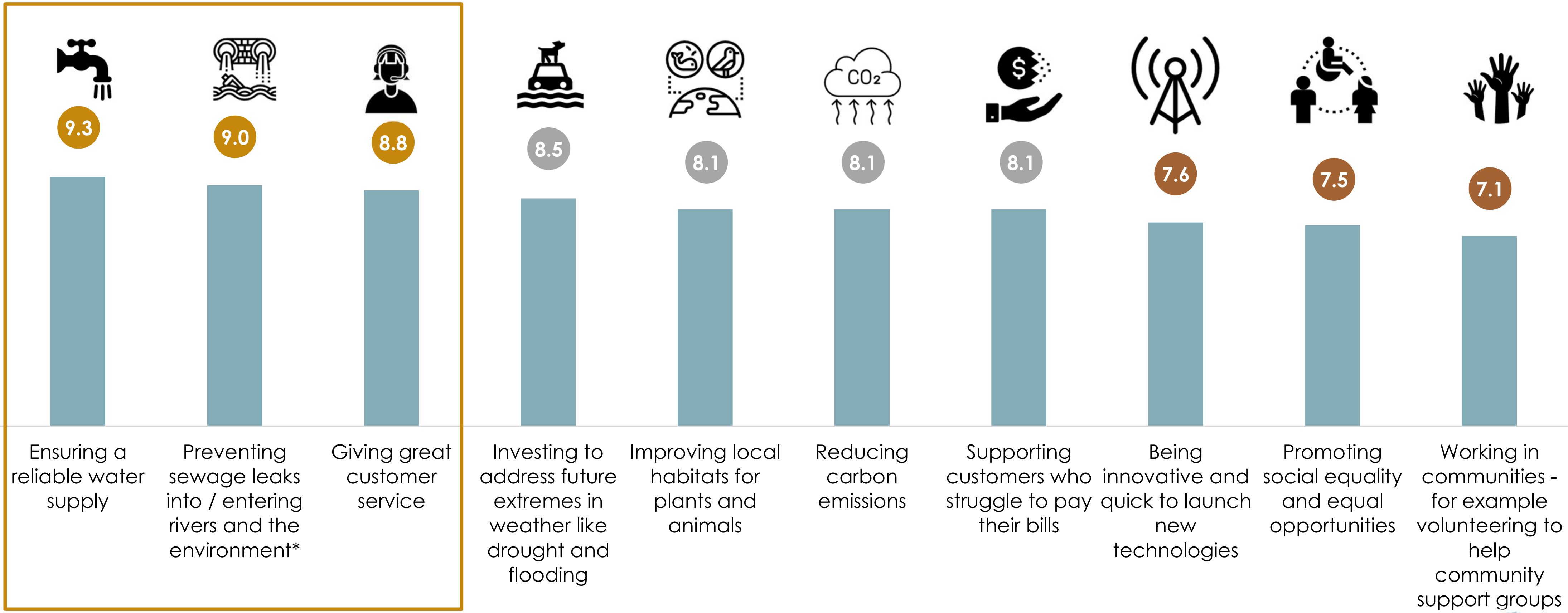
Base: All bill payers (827)

Priorities

What do consumers say Wessex Water should focus on?

This year, through turbulent times, the biggest priority has consistently been ensuring a reliable water supply. Preventing sewage leaks has been second throughout the year – not just a short-term reaction to media coverage of CSO releases.

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 2021/22 (1000)*



* New wording introduced part way through Quarter 3 fieldwork.

Overview: What's more / less important by segment?

RESPONSIBLE CITIZENS (218)

Everything is important!

Across the board, this segment are pushing for high standards. Particularly conscious of topical and 'bigger picture' responsibilities like:
- Preventing sewage leaks
- Investing to address extreme weather
- New technologies

MY WORLD & COST CONSCIOUS (213)

Supporting the community is key

Generally rate things as slightly more important than average, especially:
- Promoting social equality
- Working in the community

FAMILY FOCUS (146)

Busy lifestyle = less engaged

- While ensuring reliable supply, preventing sewage releases and great service are still relatively widely held priorities…
- …this segment rate most aspects **less** important than average

CLOSED WORLD VIEW (84*)

Fairly typical priorities

- Directionally above average for importance of core service
- …although aspects of social purpose **less** important for them

YOUNG DIS-CONNECTED (34**)

Rate most things *less* important than average – particularly 'social' role

- Ensuring reliable supply is still a key priority
- Promoting social equality and working in communities are notably less important for this segment

****CAUTION VERY LOW BASE SIZE**

STRETCHED & STRUGGLING (112)

In *relative* terms, support for those who struggle to pay is higher on their radar.

In absolute terms, they give slightly lower importance in general

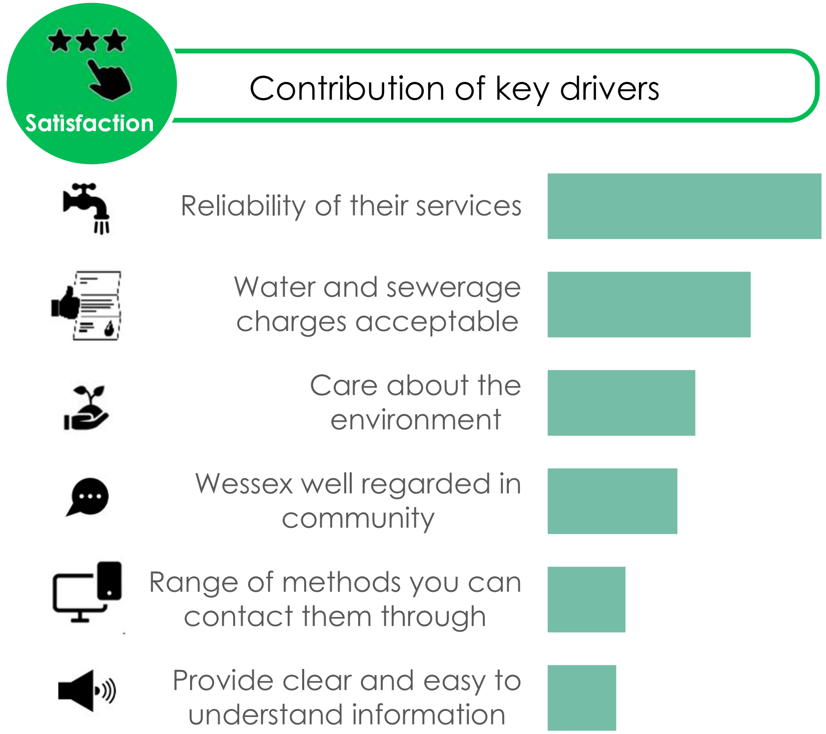
- 'Great customer service' is notably **less** of a concern for them

Q7. How important do you think it is for Wessex Water to focus on each of the following things? *Base: All respondents 2021/22 in each segment:)*

Key: *Low base size; **Very low base size - CAUTION

Key drivers of satisfaction and sentiment (2021-22 multiple regression)

- Satisfaction is driven primarily by Wessex Water seen as **reliable** and having **acceptable charges**.
- These are also key drivers of sentiment towards Wessex, but even more important is customers feeling they **know** Wessex. Being **open and transparent** is also a factor: Active and honest engagement should improve brand equity.



The model accounts for 50% of the variation of satisfaction

The model accounts for 43% of the variation of sentiment

"I've only ever had to have them sort a problem out many years ago and they sorted it very quickly. I often see them out and about doing what they're supposed to be doing, and I think the bills are very fair. I'm happy with them overall".

"(Be) honest about their shortcomings, especially over impact on the environment, and how they are addressing it. At the moment it feels like we are lectured about what we need to do and little about the company other than promotional guff."

Indicators of trust

Trust

The new tracking study incorporates a number of image and performance measures that are known to drive trust based on components of trust from ICS and Edelman. 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

Performance

Dashboard 2021-22

Core performance

- **VFM** 70% Rate 7-10
- **Satisfaction** 79% Rate 7-10
- **Affordability** 74% Agree charges affordable

Satisfaction drivers

MOST IMPORTANT

Reliability % who rate 7-10	82%
Charges acceptable % agree (bill payers and non bill payers)	65%
Care about environment % who rate 7-10	58%
Well regarded in the community % who rate 7-10	54%
Range of contact methods % who rate 7-10	67%
Clear and easy information % who rate 7-10	75%

Brand health

- **Knowledge** 40% Know a lot / fair amount
- **Sentiment** 7.5 Mean score
- **Trust** 77.3 Index (100)

Hot topics

CSOs

- 50% Aware of CSOs
- 28% Think CSO operation is unacceptable
- 13% Think local river / sea water is poor quality

Water use

- 71% 'Make effort' to save water
- 32% Not sure how can reduce use
- 35% Interested in smart meter

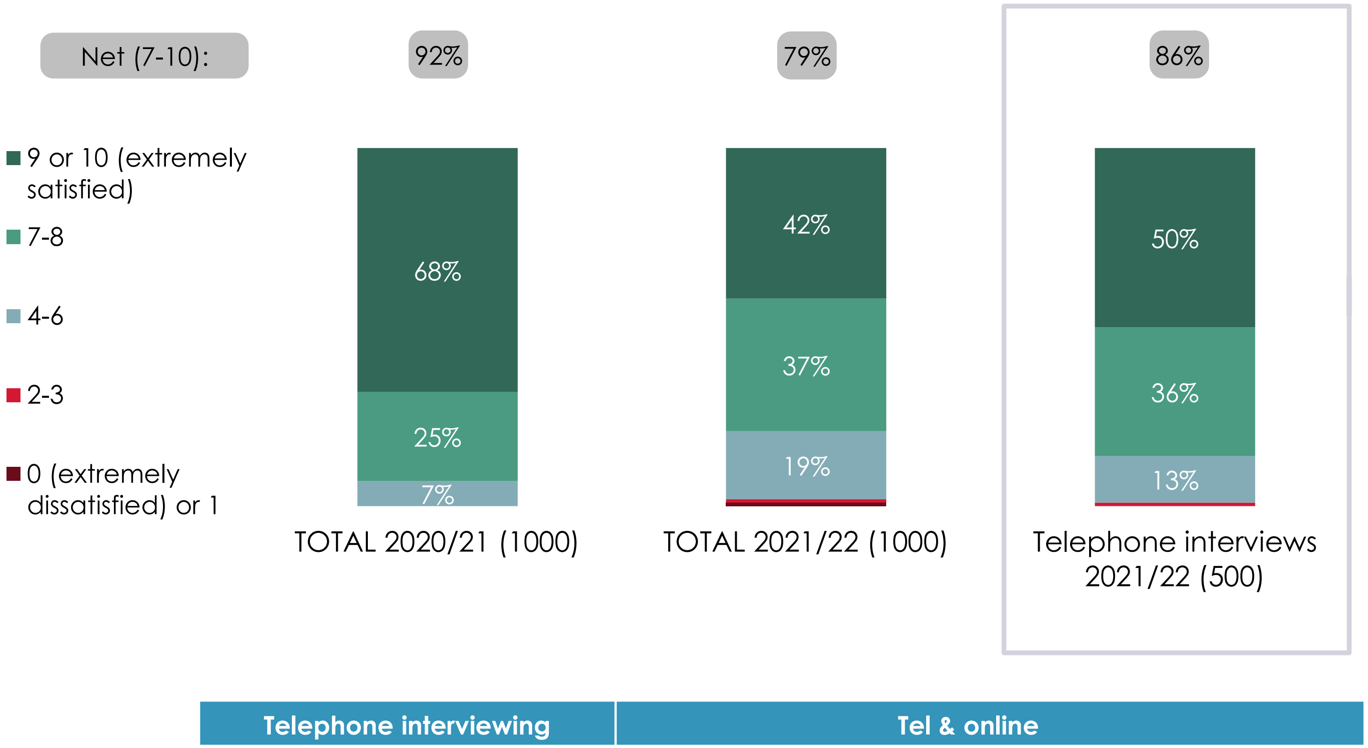
Economic

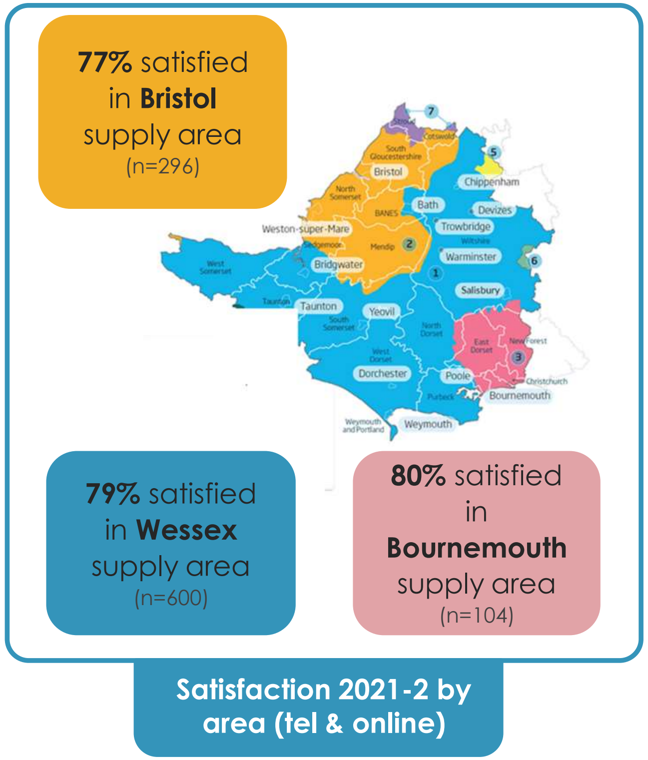
- **55%** think they will be worse off in 12 months **(Jan-Mar '22)**
- 25% Worry about affording water bill **(Jan-Mar '22)**

Overall satisfaction

Overall satisfaction this year is 79% - very similar across all three supply areas. People interviewed by telephone give higher satisfaction scores than those responding online because of the research method effect. The score for this year based on just the telephone interviews is 86%, compared to 92% last year (telephone only) - a slight decrease

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



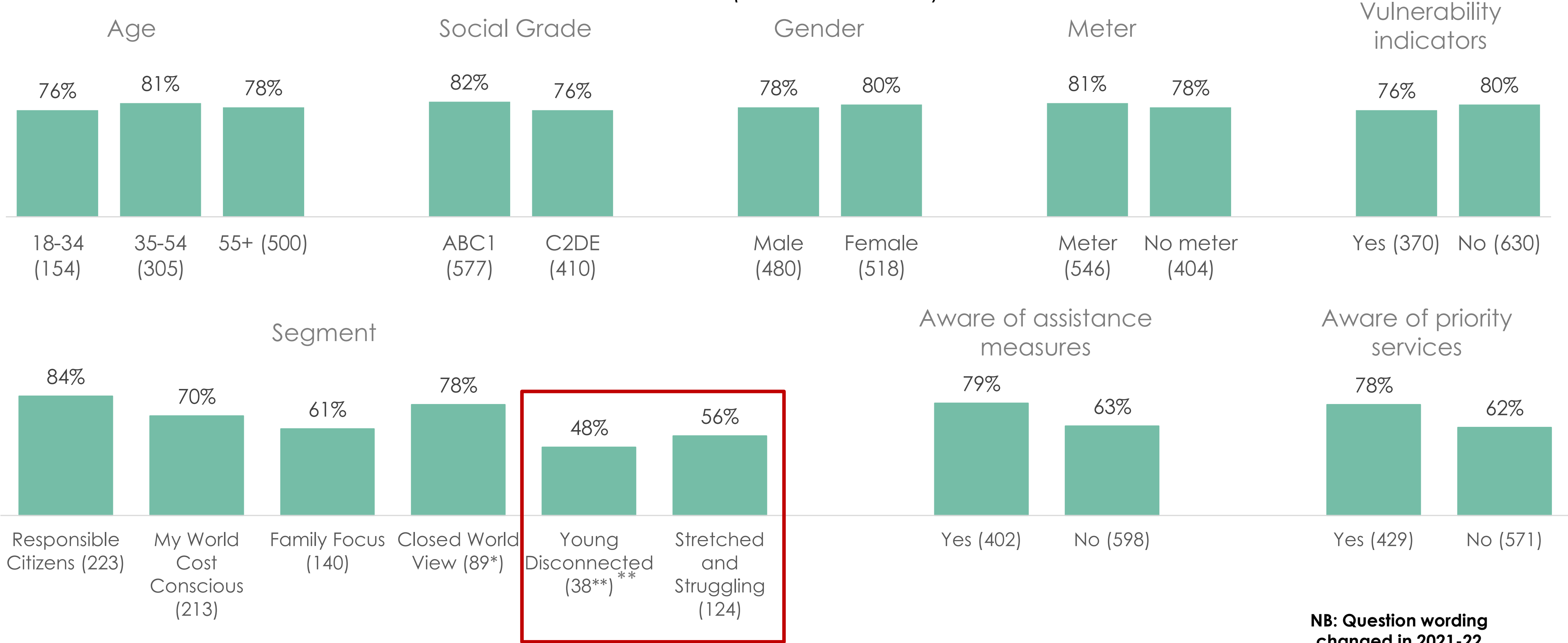


Non-bill payers included in the total sample from Q1 2020-21.

Overall satisfaction by key groups 2021-22

Satisfaction is reasonably consistent across demographic groups, those with and without a meter, and those with and without vulnerability indicators. 'Stretched and struggling' and 'Young Disconnected' segments are those where most attention is needed to try and build satisfaction.

Q15 Taking everything into account how satisfied are you with Wessex Water?
% Satisfied *(Base: All 2021-22)*



NB: Question wording changed in 2021-22

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

Why satisfied / not satisfied

When consumers think about satisfaction, they tend to think about their direct experience. ‘Top of mind’ reasons for satisfaction continue to be mostly about being reliable and problem-free. For the minority who are less satisfied there’s a mix of reasons – price, the need for better communication, water leaks and pressure problems are mentioned most.

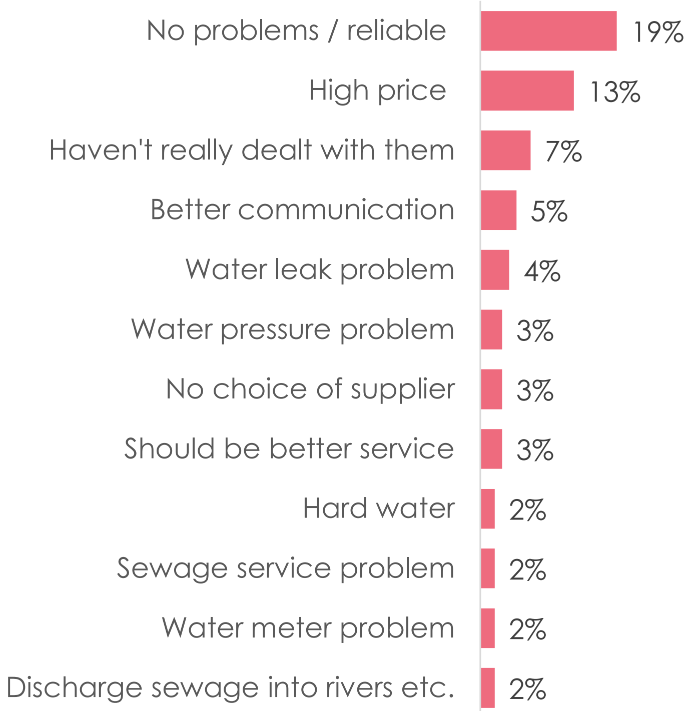
Q12 Why did you say this? Please explain as fully as you can why you gave your satisfaction score.

Those who are satisfied (score 7-10) *Base: 789*

“Not had any issues, so no news is good news.”

“They have always been brilliant. They come to resolve problems quickly and efficiently.”

Those who are less than satisfied (score 0-6) *Base: 211*



“High water bills. Don’t know too much about them to comment.”

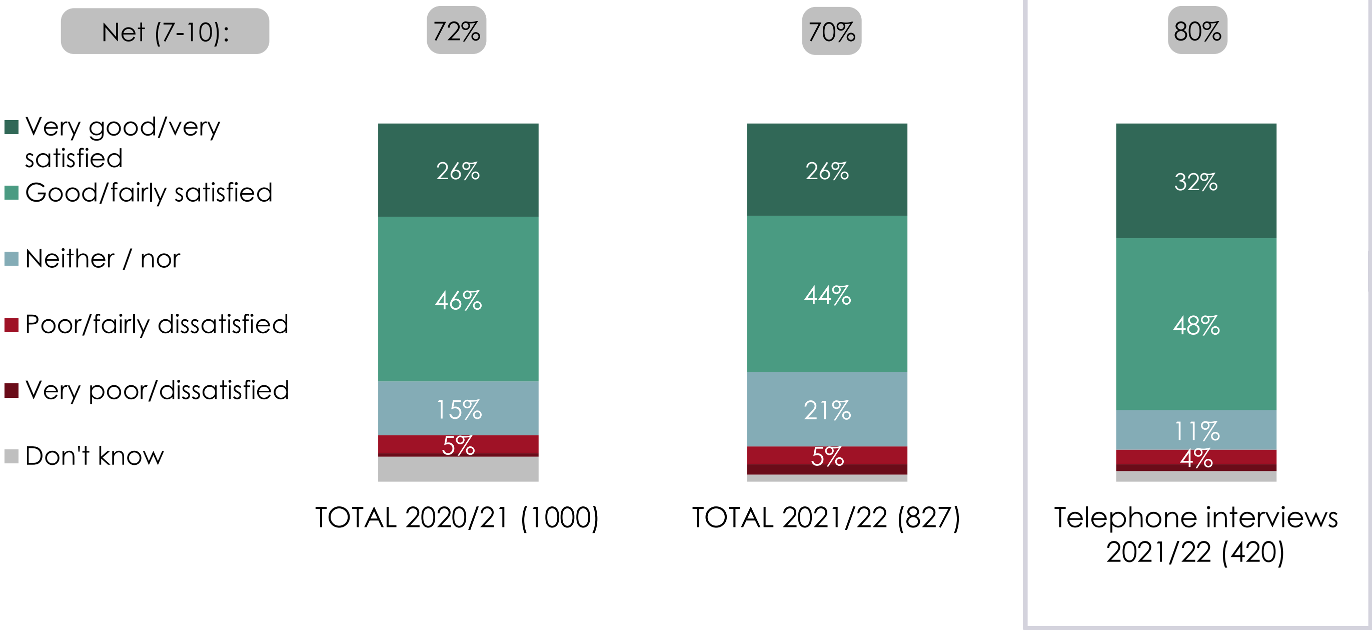
“Do not keep us informed and difficult to get hold of on the phone.”

Overall value for money

Satisfaction with **value for money** this year is 70% - very similar across all three supply areas.

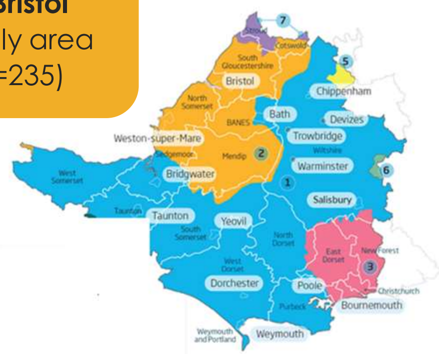
- Both the question wording and the interview method have changed this year, and non bill-payers are no longer asked, so it is difficult to compare year on year. Looking just at telephone interviewing, the score is higher this year.

Q22. How would you rate the drinking water supplies and the sewerage service you receive in your area in terms of value for money? / Q16. How satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? *Base: All consumers / all bill payers*



Telephone interviewing | Tel & online

68% satisfied in **Bristol** supply area (n=235)



70% satisfied in **Wessex** supply area (n=510)

72% satisfied in **Bournemouth** supply area (n=82)

VFM 2021-2 by area (tel & online)

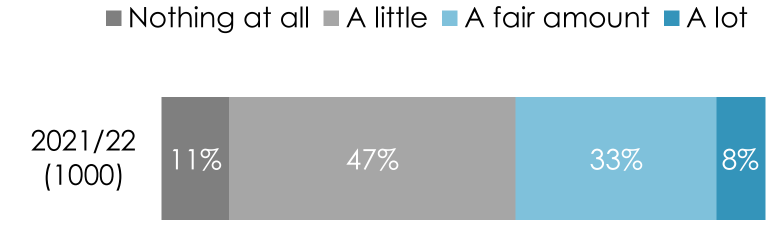
2020-21 data included non-bill payers. From 2021-2 no information is given in the survey about average bill size.

Knowledge and sentiment

Knowledge

People in the Wessex Water region still **don't feel they know much about Wessex**.

Q6. How much do you feel you know about Wessex Water and what they do?
Base: All respondents



News coverage of Wessex Water and having direct contact with them can be important factors in increasing how much people feel they know about them.

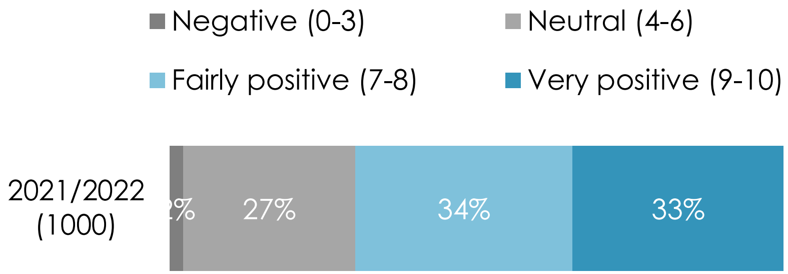
Highest for knowledge (a lot or fair amount):

- Those who have seen Wessex in the news (65%)
- Those who have contacted Wessex in last 6 months (61%)

Sentiment

It is encouraging that 1 in 3 Wessex Water customers are very positive towards them. Though there still is a sizable portion of 'neutrals' who could be uplifted.

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



Mean: 7.5

Touchpoints with Wessex Water that create a positive brand halo are social media, knowing about financial assistance, and making direct contact.

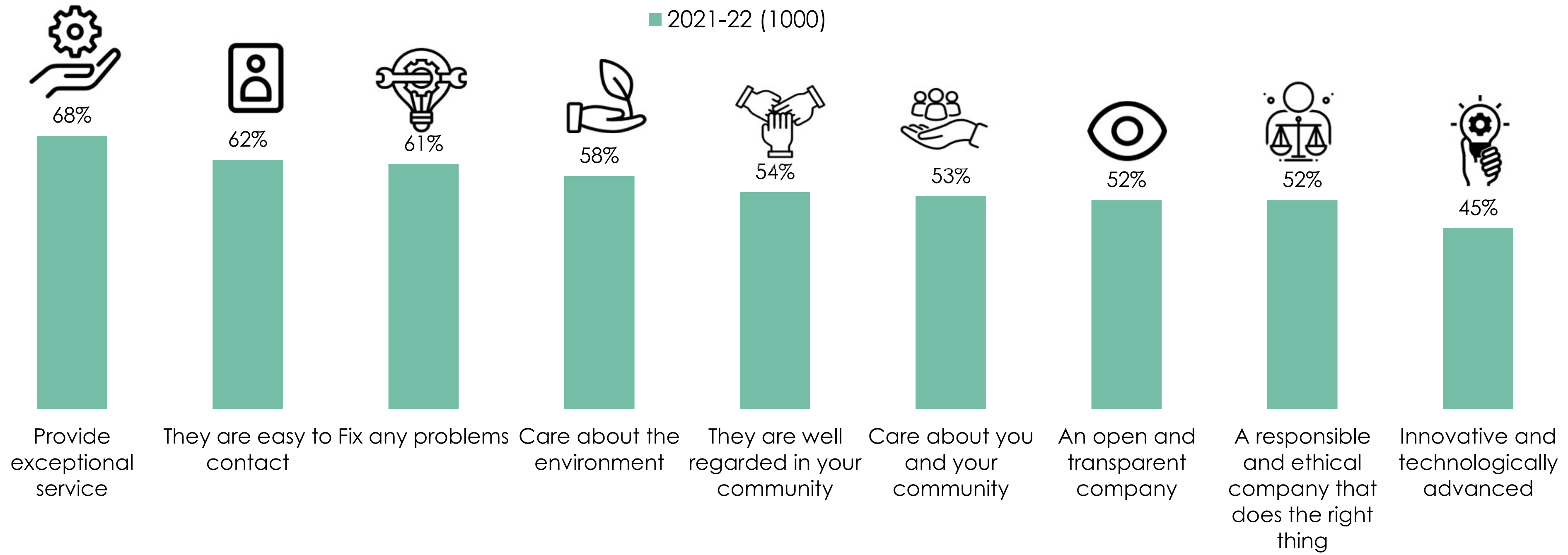
Highest for sentiment (<u>very</u> positive):

- Seen Wessex on social media (47%)
- Aware of financial assistance (45%)
- Contacted Wessex in last 6 months (42%)

Image of Wessex Water

Across 2021-22 nearly 7 in 10 consumers agree that Wessex Water provide *exceptional* service - strong testament to Wessex Water's continued pride in providing an excellent customer experience. In most other respects Wessex has a less defined image – with many simply not knowing the company well enough to comment.

Q8: Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? (% Agree 7-10) *(Base: all respondents)*



% Don't know	12%	23%	21%	21%	25%	23%	25%	25%	33%

"Never had any problems but as a result of that don't know much about them and haven't needed to contact or deal with them."

"To be honest I don't know a lot about them other than I pay them for my water supply. I have no idea of their ethics or values or even if I am getting a fair price."

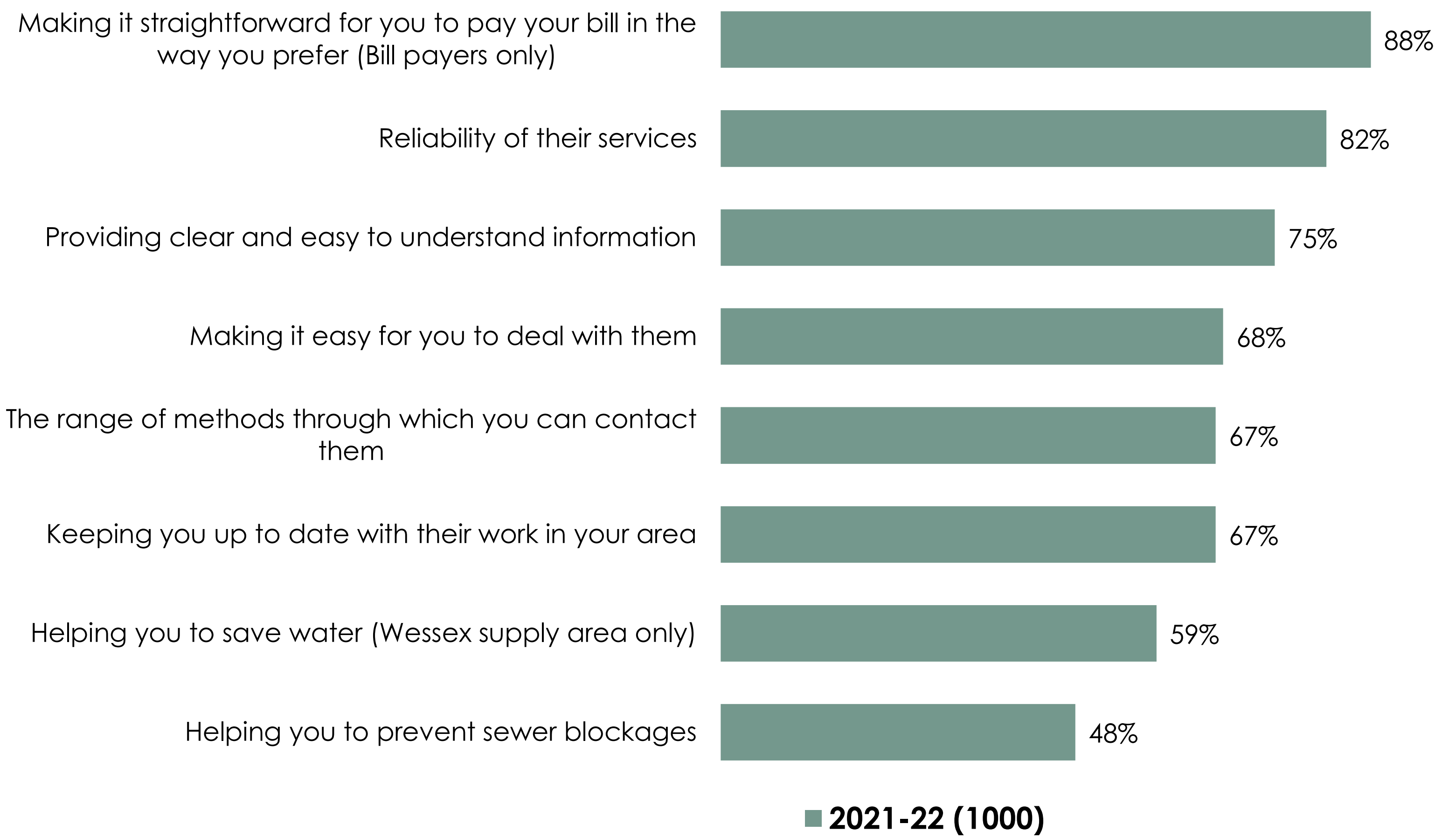
Wessex Water – Performance dimensions

Performance

Wessex Water excels in making payments straightforward with nearly 9 in 10 customers rating this highly; and reliability (a crucial factor behind satisfaction) has consistently been rated very strongly.

There are improvements to be made on communications: ‘helping customers save water’ and ‘helping 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



Trust Index

Trust

The Overall Index Score for this year is 77.3, the baseline for ongoing tracking.

Reliability and dependability is the element that stands out as strongest for Wessex Water – a need to maintain this.

Meanwhile 'Ethics' and 'Brand Validation' have the most headroom to improve.

Trust Index (maximum 100) **77.3**

Trust dimensions	Tracker measures included	Mean score
Customer ethos	• Care about you and your community • Making it easy for you to deal with them	7.6
Competence and capability	• Provide exceptional service • Fix any problems quickly	7.7
Reliability and dependability	• Reliability of their services • Easy to contact	8.2
Transparency	• Open and transparent company • Providing clear and easy to understand information	7.9
Ethics	• A responsible and ethical company that does the right thing • Care about the environment	7.4
Brand validation	• Well regarded in your community	7.4

Reliability and dependability stands out as strongest - maintain

Ethics and **brand validation** are the areas with most scope for improvement

Base: All respondents 2021-2 (1,000)

Differences in image & performance of Wessex Water by segment

RESPONSIBLE CITIZENS (218)

Higher ratings:
- Provide exceptional service
- Care about you and your community

All performance aspects – particularly aspects of communication
- Trust Index

…KNOW AND LIKE WESSEX ALL-ROUND

CLOSED WORLD VIEW (84*)

Higher ratings:
- *Relatively* higher for Wessex care about the environment
- Generally rate Wessex highly for performance – particularly for clear and easy info
- Trust Index

…POSITIVE ON PRACTICAL ASPECTS

MY WORLD & COST CONSCIOUS (213)

Higher ratings:
- Fix any problems
- Well regarded in your community
- Help you save water

…RATE WESSEX WELL ON ASPECTS RELEVANT TO THEM – BASED ON CONTACT & EXPERIENCE

YOUNG DIS-CONNECTED (34**)

Lower ratings:
- Generally lower for both image and performance – and particularly so for helping save water

***CAUTION LOW BASE SIZE**

…VERY DISENGAGED, OFTEN 'DON'T KNOW' RATHER THAN DISAPPROVAL

FAMILY FOCUS (146)

Higher ratings:
- *Relatively* higher for easy to contact

Lower ratings:
- *Relatively* lower for keeping you up to date with their work in your area
- Trust Index

…HARD TO GET THEIR ATTENTION

STRETCHED & STRUGGLING (112)

Higher ratings:
- *Relatively* higher for 'Making it easy to deal with them'

Lower ratings:
- Generally lower, particularly on performance measures

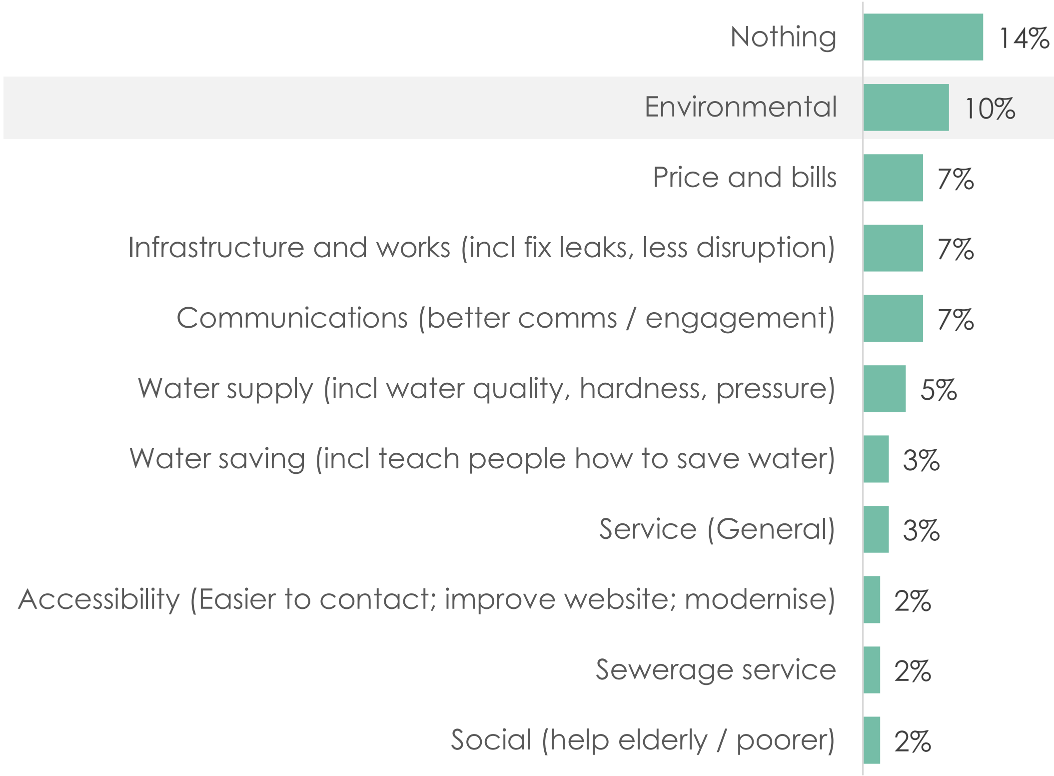
…ENCOURAGING SIGNS THAT WESSEX MAY SEEM MORE ACCESSIBLE, BUT STILL ADRIFT

Q8: Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? (% Agree 7-10) Q13. How would you rate Wessex Water's performance in the following areas? % rating 7-10 (10 = 'excellent' 0 = 'very poor'). **Base***:* All respondents 2021-2.
Key: *Low base size; **Very low base size - CAUTION

Looking ahead, what can be improved?

'Environment' is the most widespread area that consumers spontaneously mention Wessex could improve on. This is higher on the agenda than price or bills. It is a mix of being eco friendly in general and ensuring no / reduced sewage release.

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 2021-2 (1,000)*



Be more environmentally/eco friendly (general)	4%
Should be NO / LESS sewage in the rivers / sea	4%
Flood prevention	2%
Look after rivers and wildlife	1%
Climate change policy / carbon	1%

"They have had a few problems with sewage getting into rivers which I read about in the paper which they need to sort out"

"Promote environmental concerns"

"I think it's with all water companies - it's the sewage going into rivers, and helping the natural habitat."

"I think they need to invest more towards reducing climate change."

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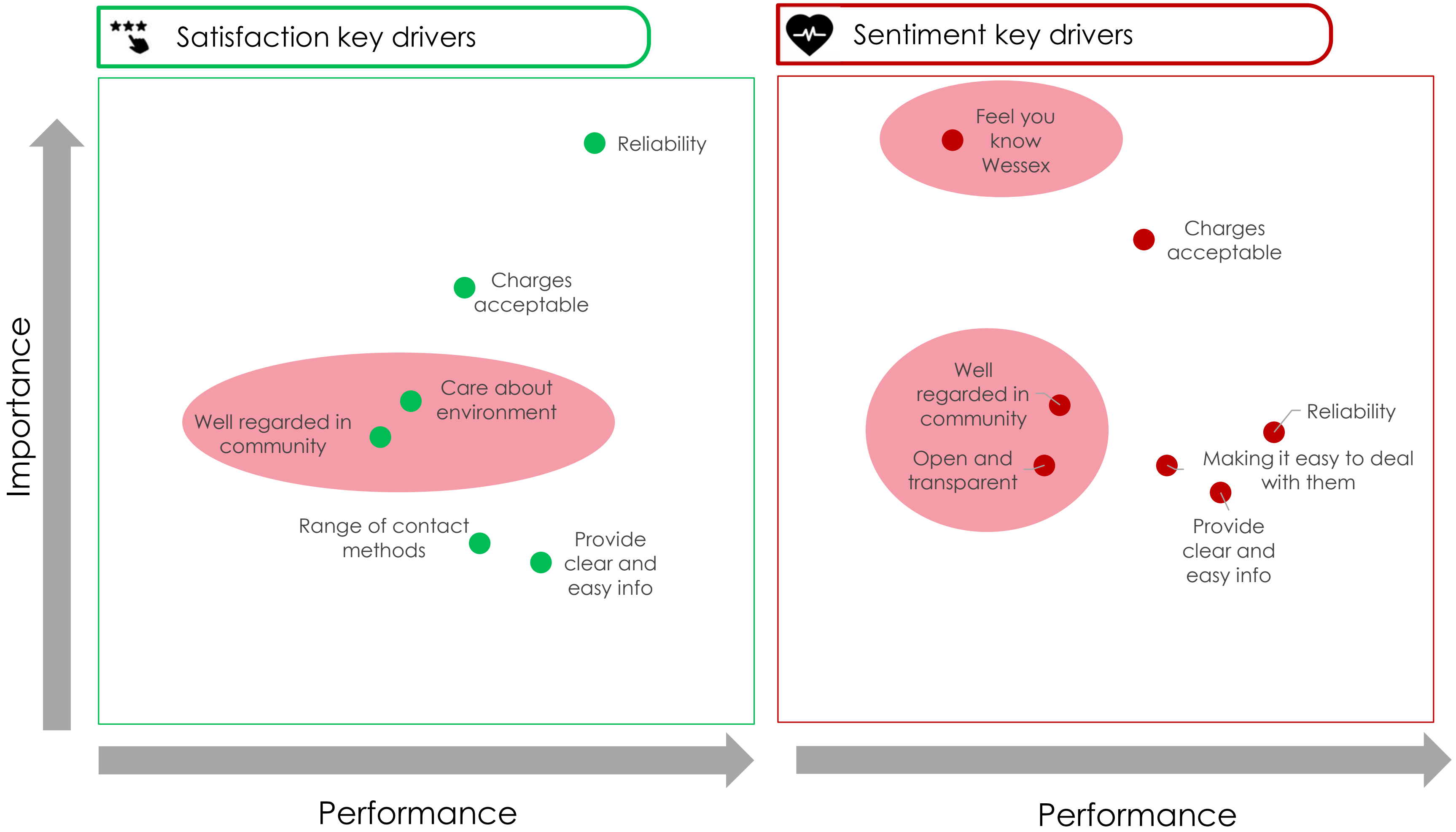
Where should the focus be?

Satisfaction

Crucial to **maintain** reliability; the areas with greatest scope to **improve** are 'well regarded in the community' and 'care about environment'

Sentiment

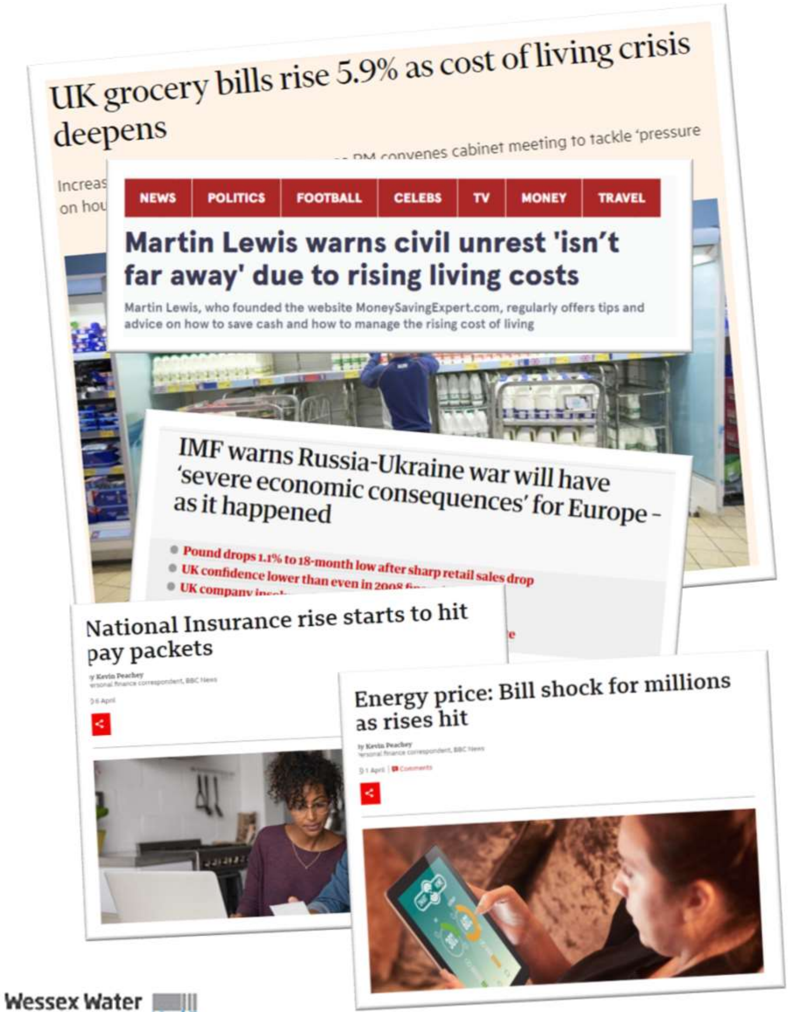
The key focus needs to be **improving** the sense that people know Wessex better. Also be **more** visible doing positive work and **grow** evidence of openness and transparency

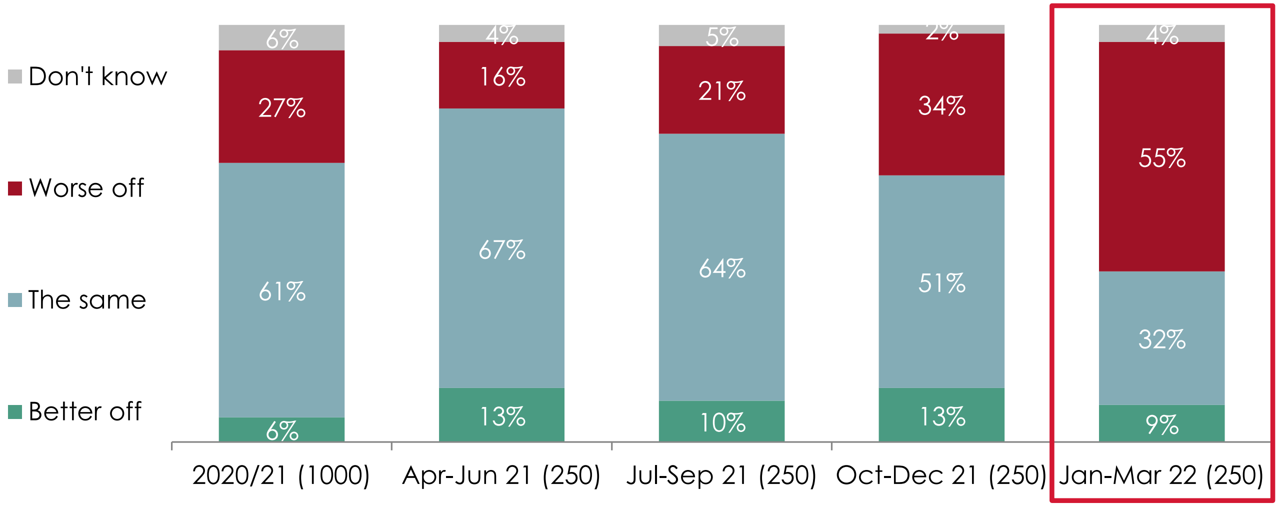


Household financial situation

Household finances: A turbulent landscape

With rising prices, and widespread reports of the cost of living crisis, there's very significant growth in the view that households will be worse off in the next 12 months – in early 2022 notably higher than any point in the last 5 years.





Q11/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*

Who thinks they will be worse off?

Demographics: **All social grades** (not just lower) and **all segments**; Slightly more likely to be older

Attitudinal: Particularly those who **cannot afford charges**; those who are not interested in a smart meter and who don't know how to save water

Slight correlation with **negative sentiment** to Wessex and **lower VFM** and, but **not strongly linked**

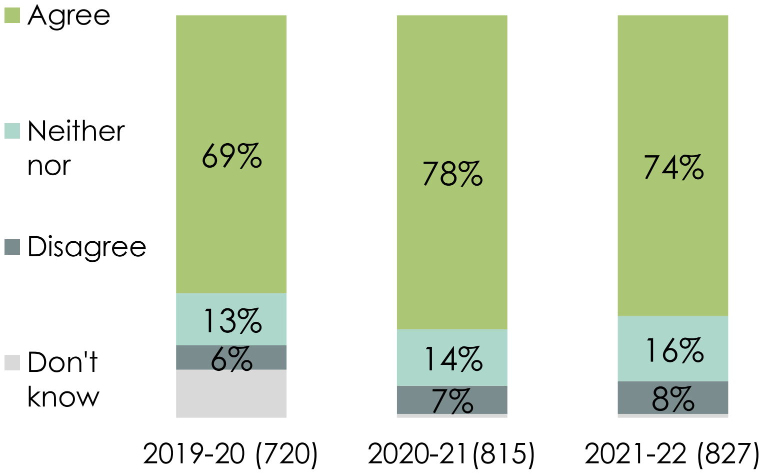
Affordability

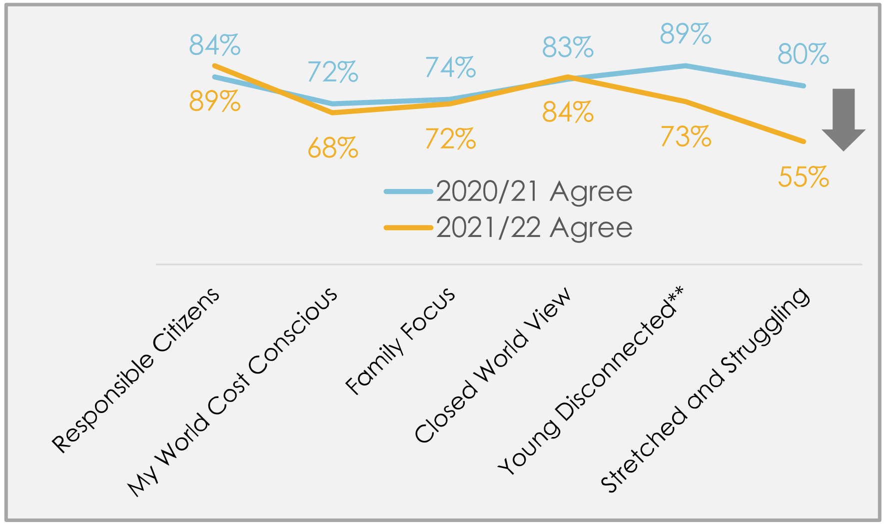
Despite the radical changes in future financial outlook, so far affordability across the sample has remained relatively stable.

However, 'Stretched and Struggling' and 'Young Disconnected' segments have seen bill affordability reduce from the high levels last year, as Covid-related support is withdrawn and higher cost of living starts to bite.

Meanwhile bill anxiety has shown signs of increasing in the first three months of 2022 – an early sign of more dramatic shifts to come?

Q19b. How much do you agree or disagree that the total water and sewerage charges that you pay are AFFORDABLE to you? *Base: All bill payers*

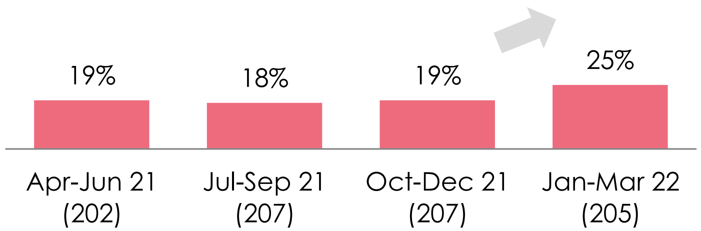




Q15. How strongly do you agree or disagree…? *Base: All bill payers*

I worry about being able to afford my water bill

% agree (7-10)
(Quarterly for 2021-2)



Bill anxiety may be starting to rise in the first part of 2022, although so far **not significantly**

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

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Where next on living costs and water bills?

- **The broader cost of living crisis is set to get worse**
- **April data from GfK shows the consumer confidence index 'going into freefall'**
- **People so far are making a clear distinction between their water bills and rising costs for other utilities**
- **Making sure people know about relevant bill support will be essential – more people liable to be in water poverty in coming months**
- **Is there an opportunity for smart meters in a climate where people will be looking to make savings? Or will it be 'the final straw' as people are obliged to economise on energy?**

Views on bills often reference protecting those in difficult circumstances

"They've put the bill down recently. One of the few companies that reduce their prices. It's the cheapest utility we have."

"Lower the prices and let them think of the disabled and OAP'S both of which describe me!"

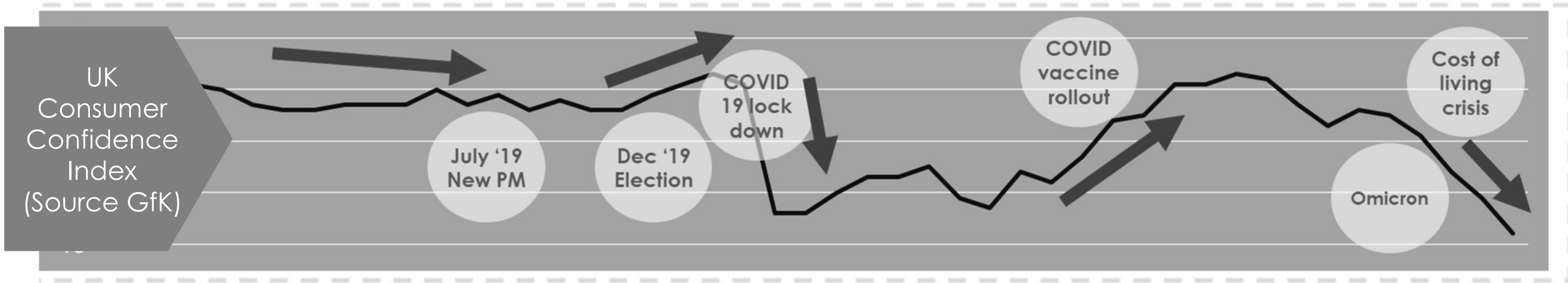
"Ensure that they are providing support to people who are on a low income"

"Keep water bills down. As with increased energy and proposed National Insurance increases, money for many will be tight".

"It's good that the bill doesn't rise unlike the council tax which went up by nearly two hundred pounds ."

"We don't have any choice when it comes to paying the bill"

"Could lower the cost. Customers could be put in bands depending on their circumstances"



Environment and CSOs

Environmental agenda throughout 2021-22

We have seen fluctuating focus on the climate crisis over the last year, peaking over the Autumn.

Spring 2021
- Covid restrictions being gradually lifted

Autumn 2021
- COP26 begins October 21st for two weeks in Glasgow
- Parliament vote on CSOs and heightened media scrutiny
- Net Zero strategy report published by government
- Insulate Britain protests blocking off roads and infrastructure

Spring 2022
- Latest IPCC report published warning of an 'atlas of human suffering'

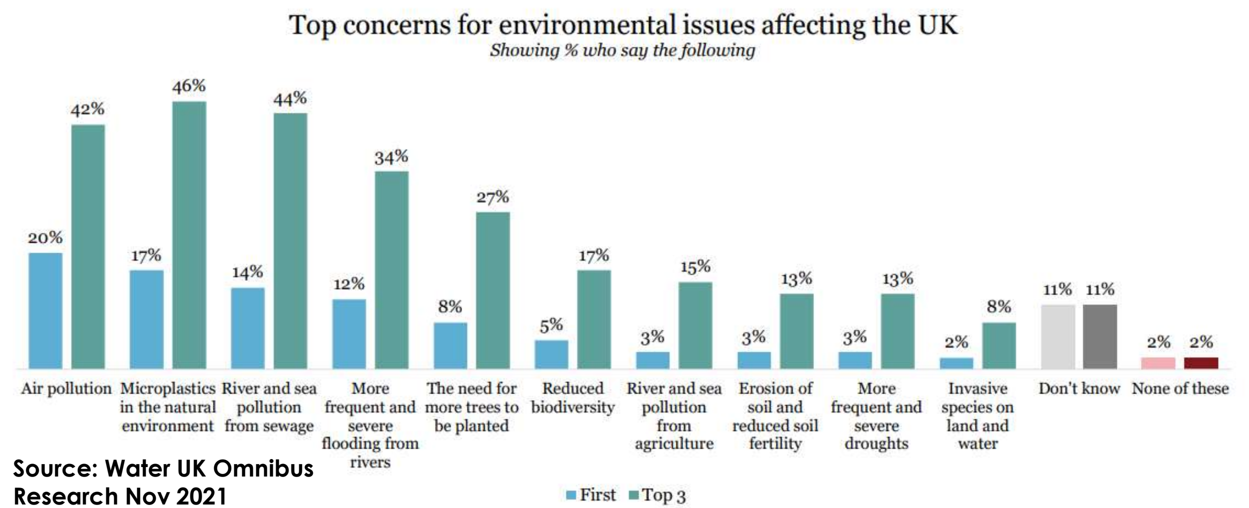
M	A	M	J	J	A	S	O	N	D	J	F	M

Summer 2021
- With reduction of Covid restrictions, public focus was on socialising
- Particularly hot summer, though not record breaking with highest temperature being recorded at 32.2°C at Heathrow

Winter 2021-22
- Price increases felt as fuel prices rise and cold weather hits
- Russia escalates into full invasion of Ukraine with various economic impacts felt around the world
- Storm Eunice hits UK causing destruction

CSO context

The environment has had a prominent year in the media due to COP26 and IPCC reports. CSOs is not the top concern on the environmental agenda, but has had real prominence, with interest peaking around media coverage (e.g. Environment Bill vote).



Source: Water UK Omnibus Research Nov 2021

MPs vote to allow water companies to dump raw sewage into rivers and seas

Comment

Gergana Krasteva
Monday 25 Oct 2021 4:04 pm

5.2k SHARES

Water companies discharged raw sewage more than 400,000 times last year (Pictures: REX / Getty)

Google Trends

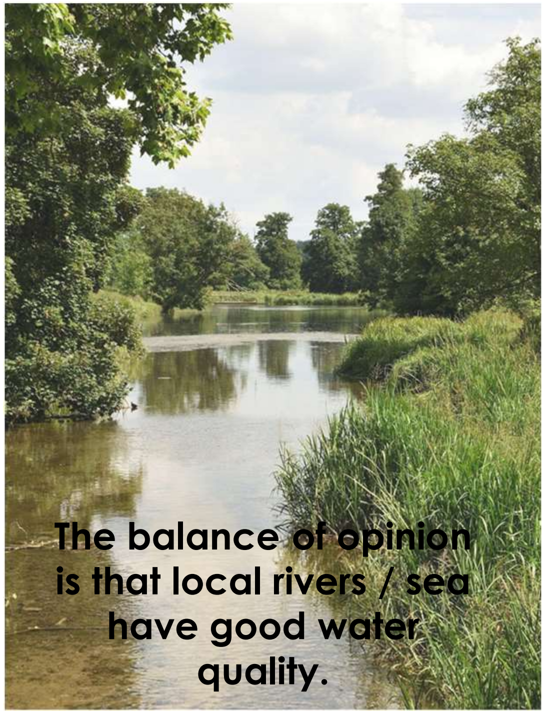
‘Sewage in rivers’

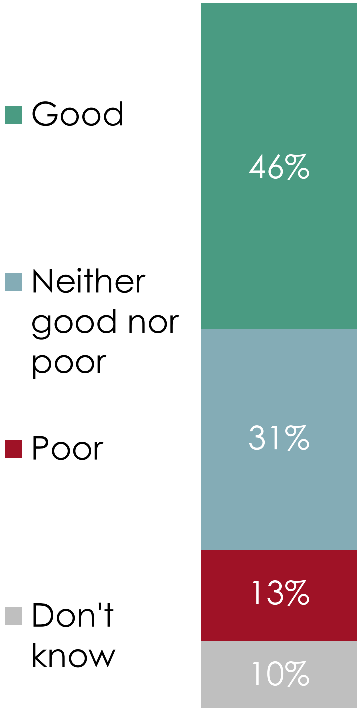
October 24th-October 30th 2021

River & sea water quality and awareness of storm overflows (CSOs)

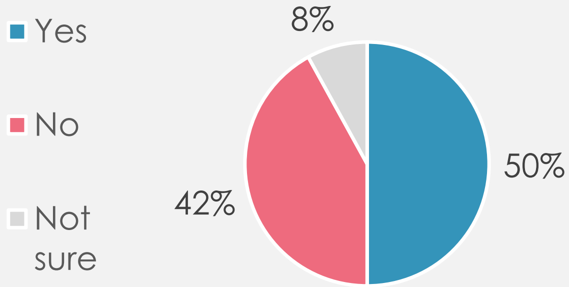
46% think river/sea water in their area is good quality, with only 13% thinking it poor. Meanwhile half claim to be aware of CSO releases, so it's clear that knowing about them doesn't necessarily translate into believing local water quality is poor.

QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality? *Base: All respondents 2021/22 (500)*





QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before? *Base: All respondents 2021/22 (500)*



Those aware of CSO releases are more likely to:

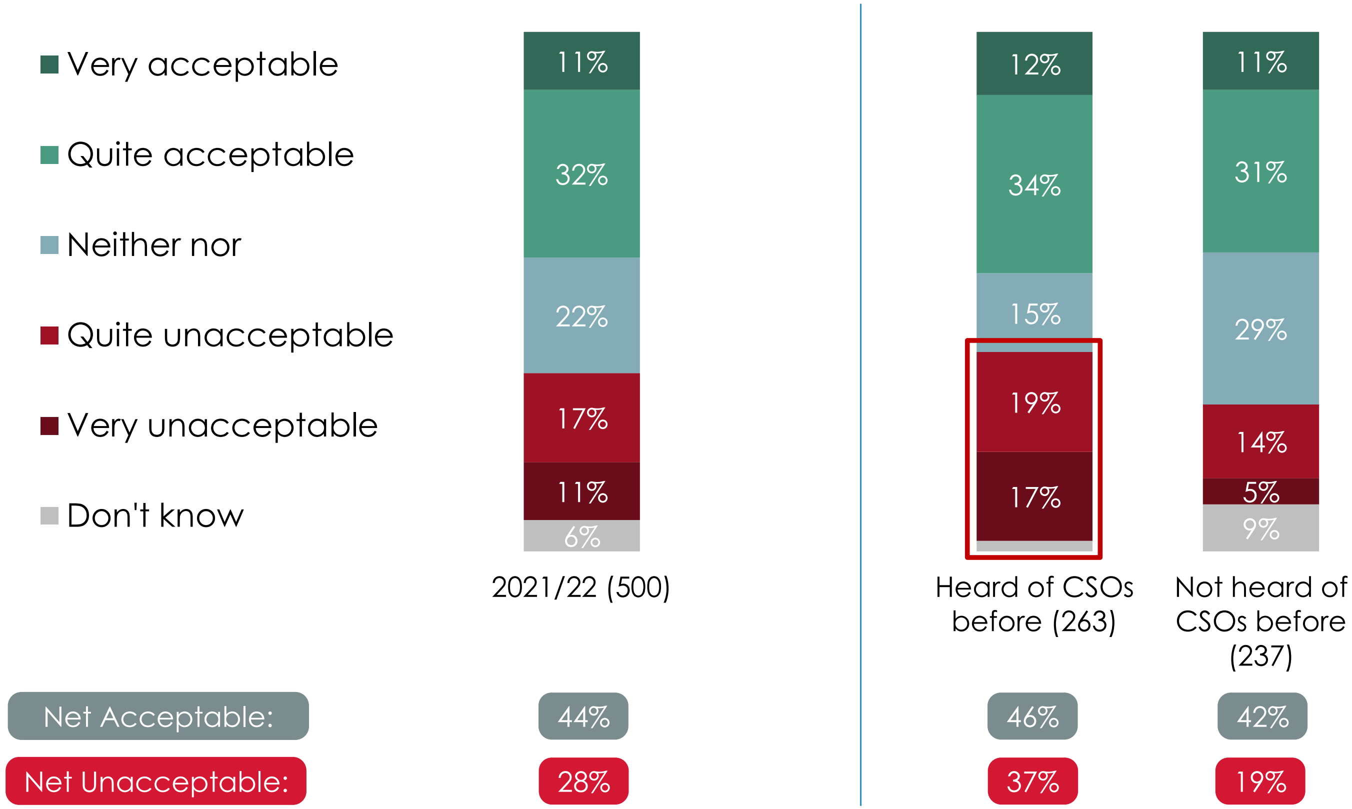
- Be **older**, **men** and **higher social grade** (not all young activists!)
- Be **'Responsible Citizens' and 'My World Cost Conscious'**
- Read **local newspapers** and community publications
- **Know about Wessex** Water and have seen them in various media
- Be more **environmentally engaged**, make effort to save water and prioritise local habitats & reducing carbon emissions for Wessex)
- Be **interested in hearing how Wessex protect the environment.**

While they take a dimmer view of CSOs than people who have not previously heard of them, this does NOT mean they have a worse view of Wessex Water – no major detrimental effect on underlying image.

Acceptability of the operation of storm overflows (CSOs)

When presented with an explanation of how and why storm overflows operate, there is divided opinion as to whether storm overflows are acceptable or not: Over 4 in 10 think they are acceptable, but nearly 3 in 10 think they are unacceptable. People who have heard of CSOs before are more likely to think that CSOs are **very** unacceptable.

QF1d After heavy rainfall storm overflows may operate to prevent properties from flooding. When storm overflows operate they release mostly rainwater with small amounts of heavily diluted sewage into rivers or the sea. This has no or a minimal and temporary impact on the environment. **Based on this information, how acceptable do you think storm overflows are?**



Where next on sewer overflows?

A mixed picture – potentially a need for different communications depending on customers' awareness of and engagement with the issue.

A spectrum of knowledge & depth of feeling expressed

"Generally fine with the company and the level of charges we pay. Sewage overflow into rivers and sea appears to be a problem area that needs addressing"

"If there are sewage spills they should fix and monitor those."

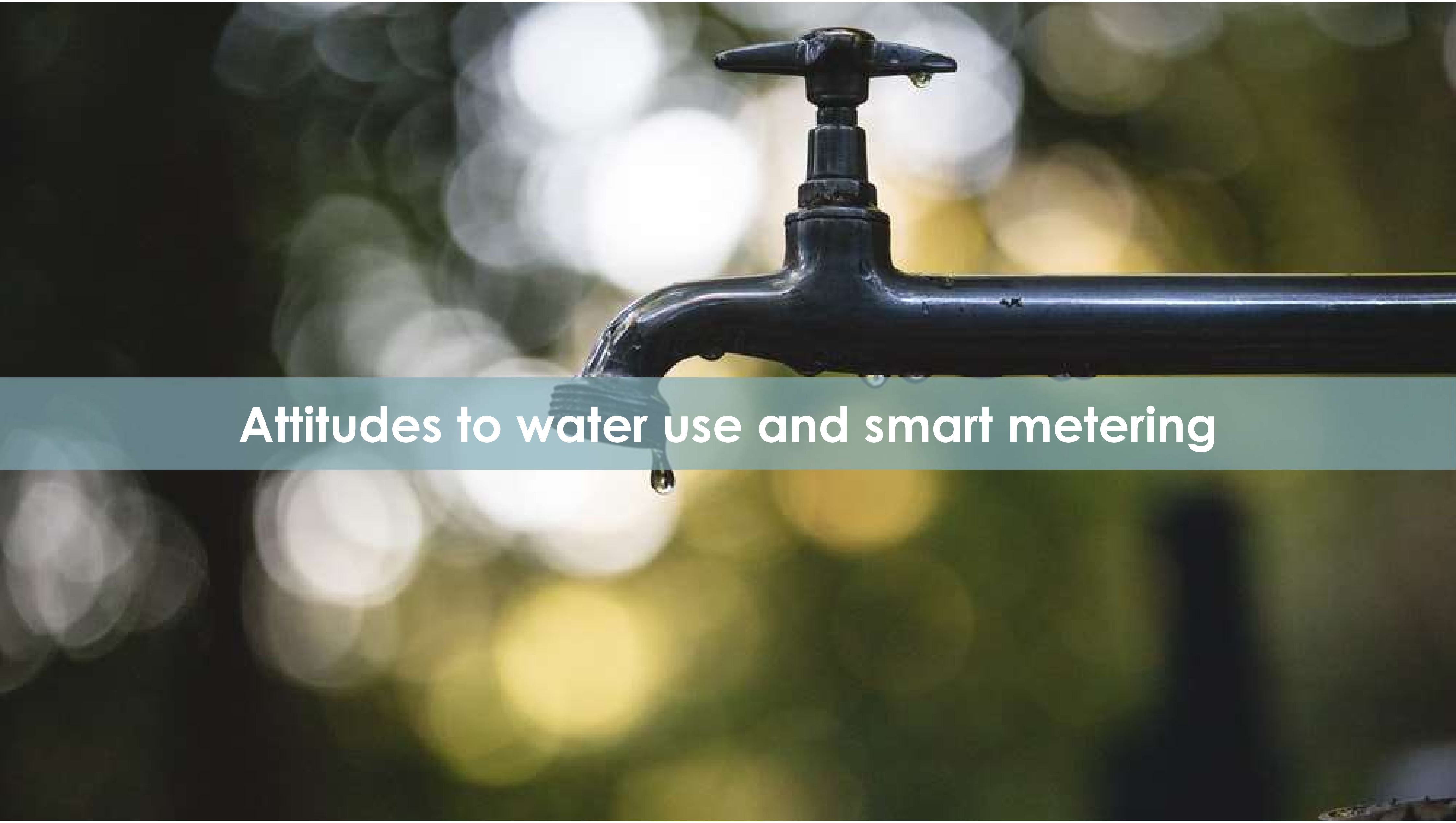
"Their record on the coast is not amazing due to sewage outfall"

"They don't appear to have done a great deal to deal with the problem of sewage going into our water courses. Last year alone there were a lot of instances where raw sewage was discharged into some of our best beauty spots."

"Upgrade the sewerage systems so there is less of a need to discharge sewage into our beauty spots. Basically do the job that the water and sewerage companies were privatised to do in the first place."

"There should not be any sewage going into rivers and seas it's disgusting that there is. They claim it's only in emergencies when there has been flooding but this is not the case."

- **Those aware of CSOs are interested in hearing from Wessex about what they are doing for the environment, and they welcome engagement on this. Most have broadly goodwill towards the company, but many are actively concerned by CSOs and nearly 4 in 10 do not accept their current mode of operation. They believe something needs to be done.**
  - Be seen to be **doing something** (potentially in broader environmental perspective)
  - Make available the facts where consumer views may be ill-informed / reactionary to media
  - Be **open, honest and transparent**, acknowledging if there have been mistakes



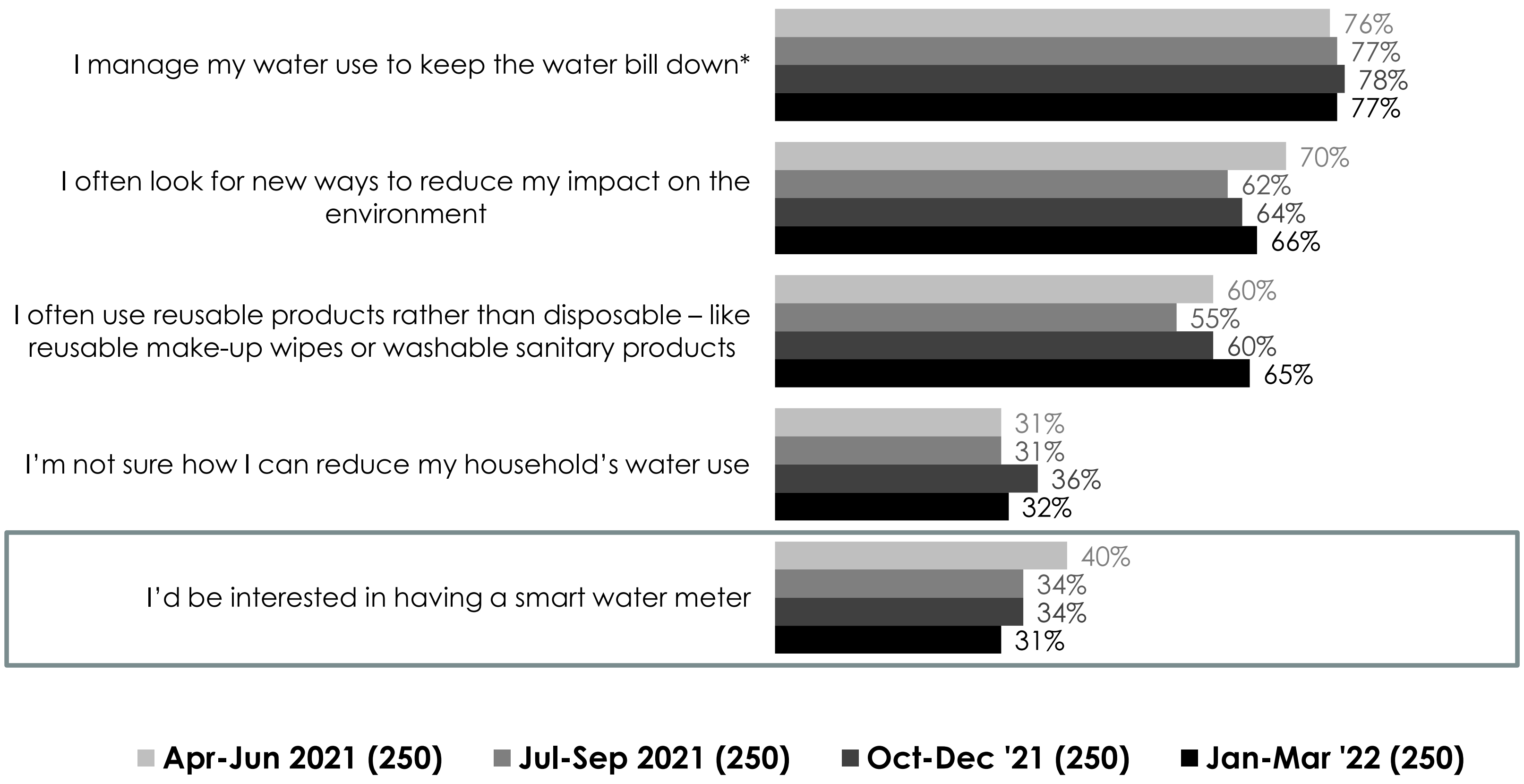
Attitudes to water use and smart metering

Attitudes to water use and metering

Water use and Metering

A consistent majority of people with a meter claim to manage water use to keep the bill down – no evidence that broader financial anxieties are prompting more to do this. Limited *uninformed* interest in smart water meters.

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



***Base:** Respondents with a water meter Q1(120); Q2(135); Q3 (136) Q4 (126)

blue marble

Profiling attitudes to water efficiency

	I'd be interested in having a smart water meter	Want to reduce bill by using less water	Not sure how I can reduce water use
Those who agree	• More likely to **have a water meter** • **Younger** • **Positive** future outlook • More open to **online and digital comms** (**'digital sharers'**) • More likely to agree '**I want to reduce the water bill by using less water**' and '**I often look for new ways to reduce my impact on the environment'**.	• **Fairly typical** of those with a water meter • Higher than average **interest in getting a smart meter**.	• More likely to **worry about affordability** and display indicators of **vulnerability** • Slightly **lower social grade** • A little more likely to be **single-adult** households
Those who do not agree	• **Less likely to already have a meter** • **Older** (half > 55) • **More worried about the future** • More likely to be **'analogue private'**	• **Less worried** about **affording** their bill • **Less effort** to save water • Smaller households	• More likely to be 'Responsible Citizens'

Metering and water use – key findings

Interest in smart water meters

- **Uninformed interest** is **limited** – under 4 in 10.
- Interest is related to **economising** and also **environmental engagement**
- Those who are interested embrace online services and data sharing – responsive to **social media** and **digital channels**
- Those who are **less interested** are more 'analogue' - less happy with sharing (and potentially using) data

Want to reduce bill by using less water

- A **high proportion** of customers with a meter (7 in10) claim to **want to reduce their bill by using less water**
- Those who are **less** motivated, are not so worried about affording their bill, and currently make less effort to save water (tending to have smaller households)
  - The impact of the cost of living crisis on these people is hard to predict

Not sure how to reduce water use

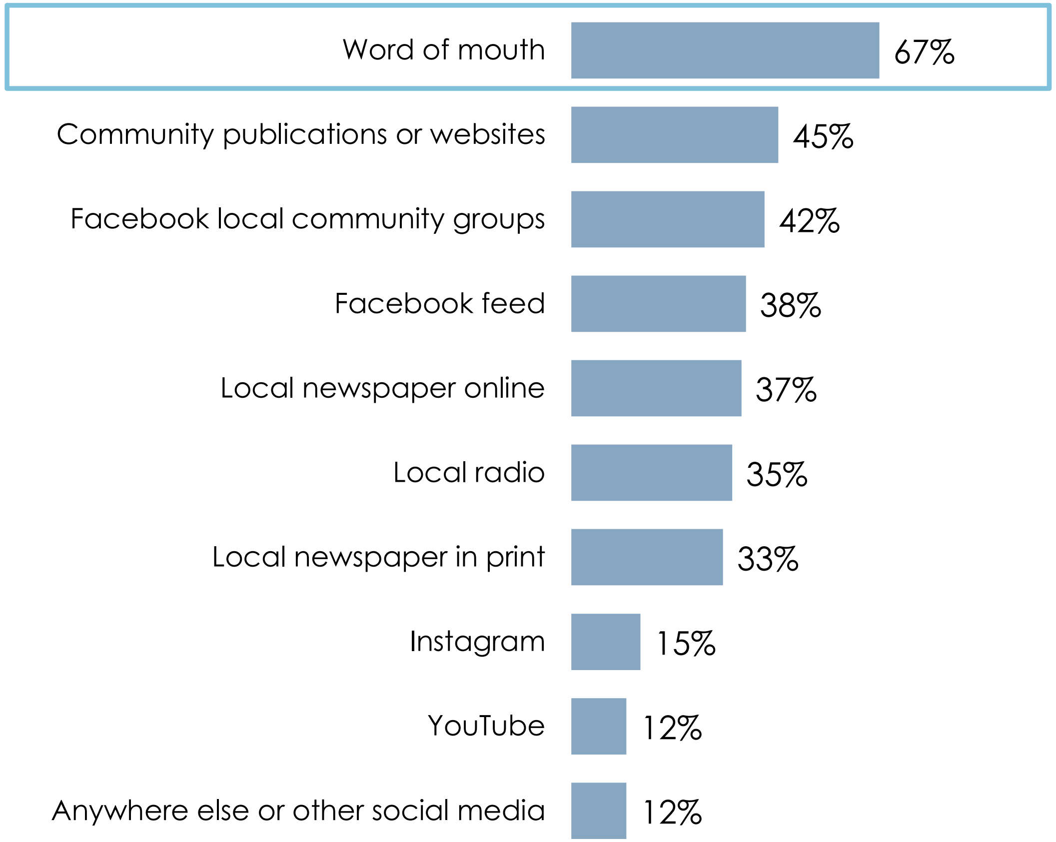
- Some of these **have less capability** to do so due to vulnerabilities, or because they already do not use much water (e.g. single adult households)
- Others will **not have full knowledge** of the range of ways in which they could reduce water use – scope to build awareness

Communication

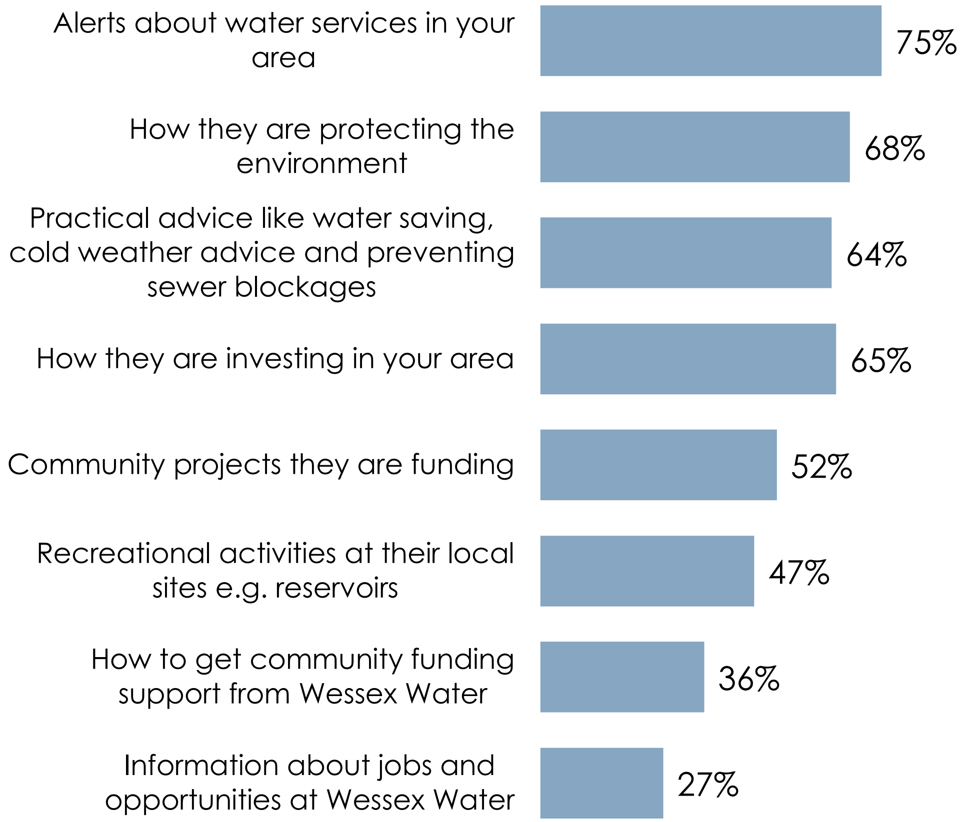
Sources of local information and potential messaging

Word of mouth is universally the most widely used source of local information, while the number one topic all customer groups would like to hear from Wessex is alerts about water services.

How do you hear about local information or news? % hearing…



Interested in receiving from Wessex Water? % interested…



Q21: Now thinking more broadly, how do you hear about local information or news in your area? **Base**: All respondents 2021-2 (1,000)

Q22: What sort of information would you be interested in receiving from Wessex Water? **Base:** All respondents 2021-2 (1,000)

Beyond using word of mouth and wanting alerts, there are differences

Segment	Which channels for local news?	Which messages from Wessex?
RESPONSIBLE CITIZENS (218)	Average use of channels for local info Most accessible via **community publications / websites**	**High interest** in a variety of messages from Wessex.
MY WORLD & COST CONSCIOUS (213)	Widest variety of channels used for local info Most accessible via **Facebook local community groups**	**Highest interest of all** in messages from Wessex, particularly: • Practical advice • Environment • Community projects & funding support • Recreational sites
FAMILY FOCUS (146)	Wide variety of channels used for local info Most accessible via **Facebook local community groups**	**Particular interest in** • How Wessex are investing in the area • Environment

Segment	Which channels for local news?	Which messages from Wessex?
CLOSED WORLD VIEW (84*)	Lower use of channels for local info – particularly low for social media Most accessible via **mix of local publications, paper and radio**	**Generally lower interest** in hearing from Wessex **…but *relatively* high for:** • Practical advice • How Wessex are investing in the area
YOUNG DIS-CONNECTED (34**)	Lower use of channels for local info – particularly low for social media Most accessible via **local radio** ***CAUTION LOW BASE SIZE**	**Very little interest in hearing from Wessex**
STRETCHED & STRUGGLING (112)	Lower use of all channels than average for local news **Most challenging group to reach – local radio is most widely used channel but other approaches needed**	**Generally lower interest** in hearing from Wessex **…but *relatively* high for:** • Practical advice

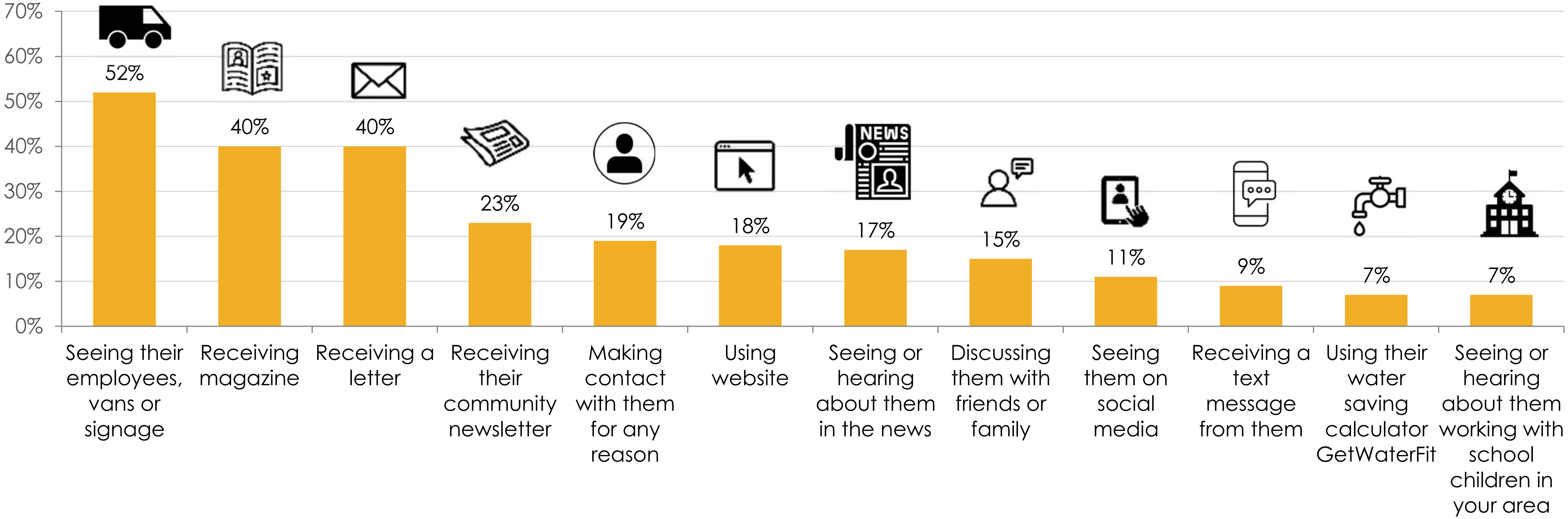
NB <u>ALL</u> SEGMENTS HEAR ABOUT LOCAL NEWS THROUGH WORD OF MOUTH AND WANT ALERTS ABOUT WATER SERVICES

Q21: Now thinking more broadly, in general, how do you hear about local information or news in your area? **Q22**: What sort of information would you be interested in receiving from Wessex Water? **Base***:* All respondents 2021-2. ***Key: *Low base size; **Very low base size - CAUTION***

Prompted recall of touchpoints (2021-22)

Wessex Water's presence is primarily expressed through seeing the company 'out and about' – through employees, vans or signage, followed by receiving the magazine, and receiving letters. Notably all of these remain tangible (non digital) activity.
*NB question wording was changed to reflect last 6 months, vs. last year in previous tracking, so not directly comparable with previous data.

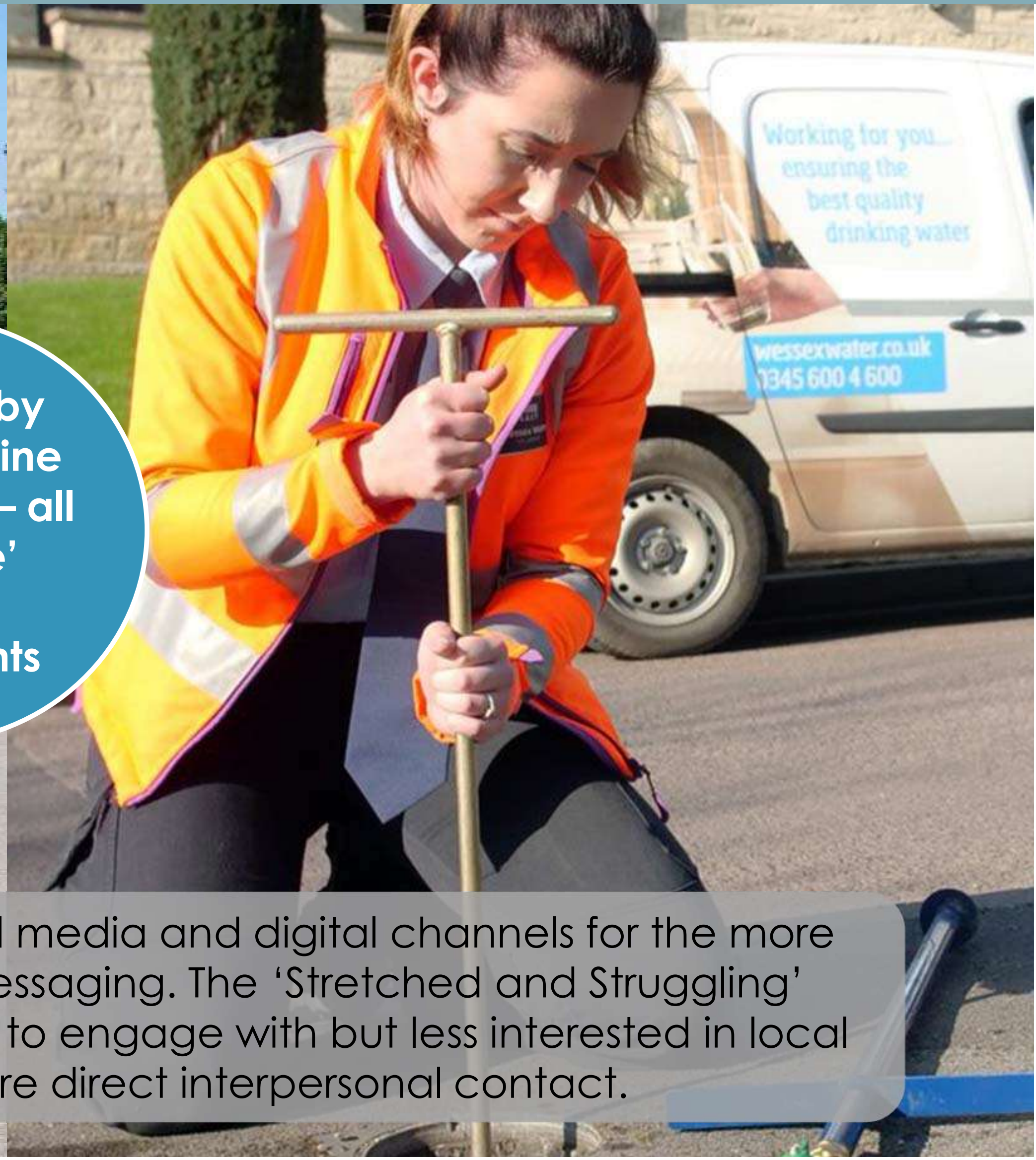
Thinking about Wessex Water, in the last six months do you recall…?
Base: All respondents 2021-22 (1,000)



Wessex Water YTL GROUP

blue marble

Vans, employees and signs are the biggest Wessex Water presence



Followed by the magazine and letters – all 'tangible' brand touchpoints

…looking ahead, there's opportunity to use social media and digital channels for the more 'involved' segments, enabling more relevant messaging. The 'Stretched and Struggling' segment remains a particular challenge: A priority to engage with but less interested in local media channels – they may require more direct interpersonal contact.

Summary

Headline summary

1. The developing cost of living crisis is having unprecedented impact on household outlook

2. So far Wessex have remained ‘insulated’ from any significant negative perceptions resulting from rising prices elsewhere

3. However, some early signs that water bill affordability anxieties are growing and people are conscious of the need to protect the (financially) vulnerable

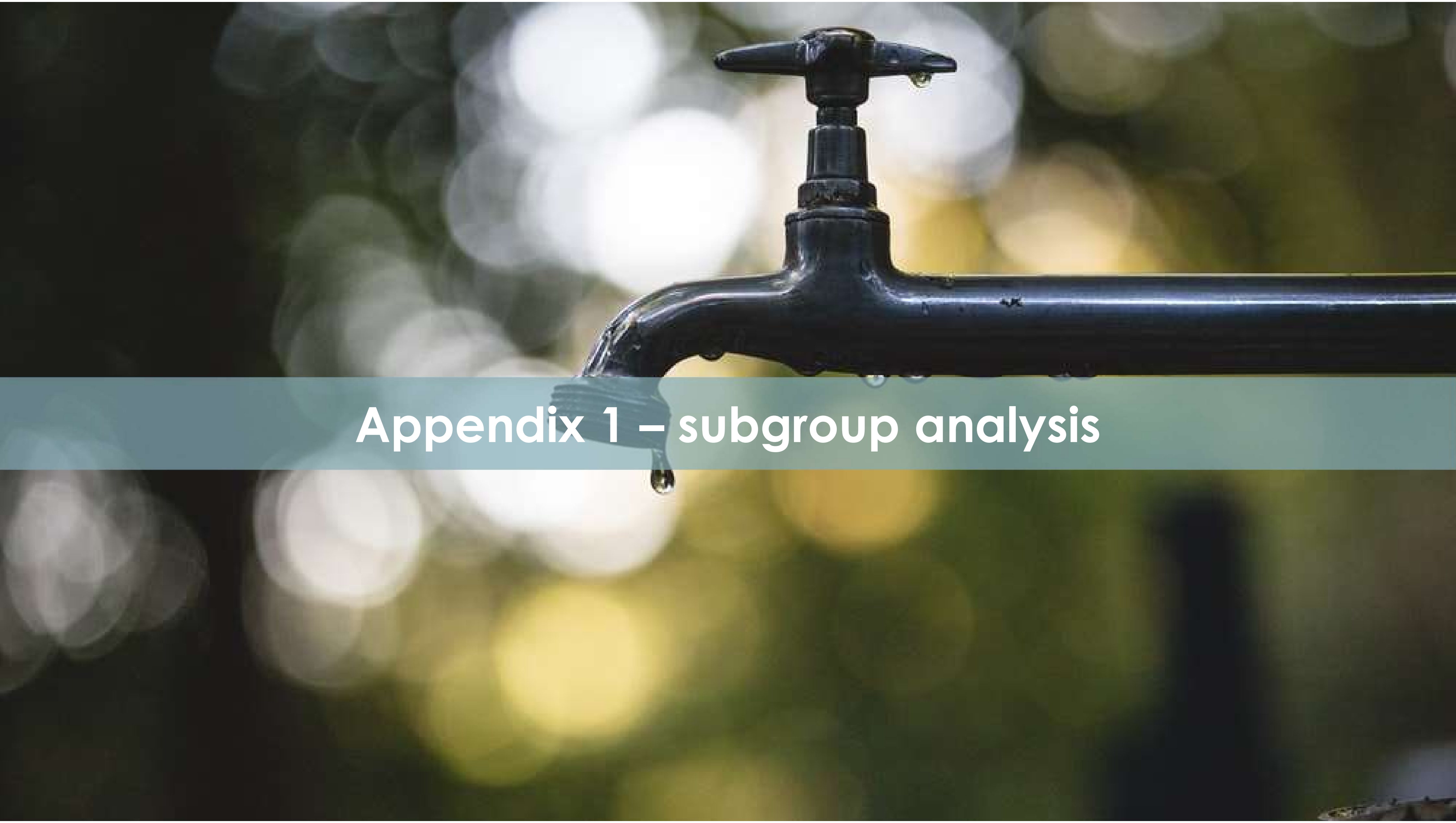
4. ‘Stretched and Struggling’ are falling back again for VFM and affordability ratings after the picture improved in 2020-21, and should be a priority for engaging with

5. Driver analysis reinforces the critical importance of Wessex Water’s strong reliability and dependability over the last year….

6. …and looking forward it underpins the need to push further to demonstrate environmental care and build a positive reputation in the community

7. CSOs is a top of mind environmental issue. It has not fundamentally upset most customers’ perceptions of Wessex but they want to see action and transparency

8. More tailored and targeted communications can develop and manage customer relationships - and reach those who find themselves needing assistance

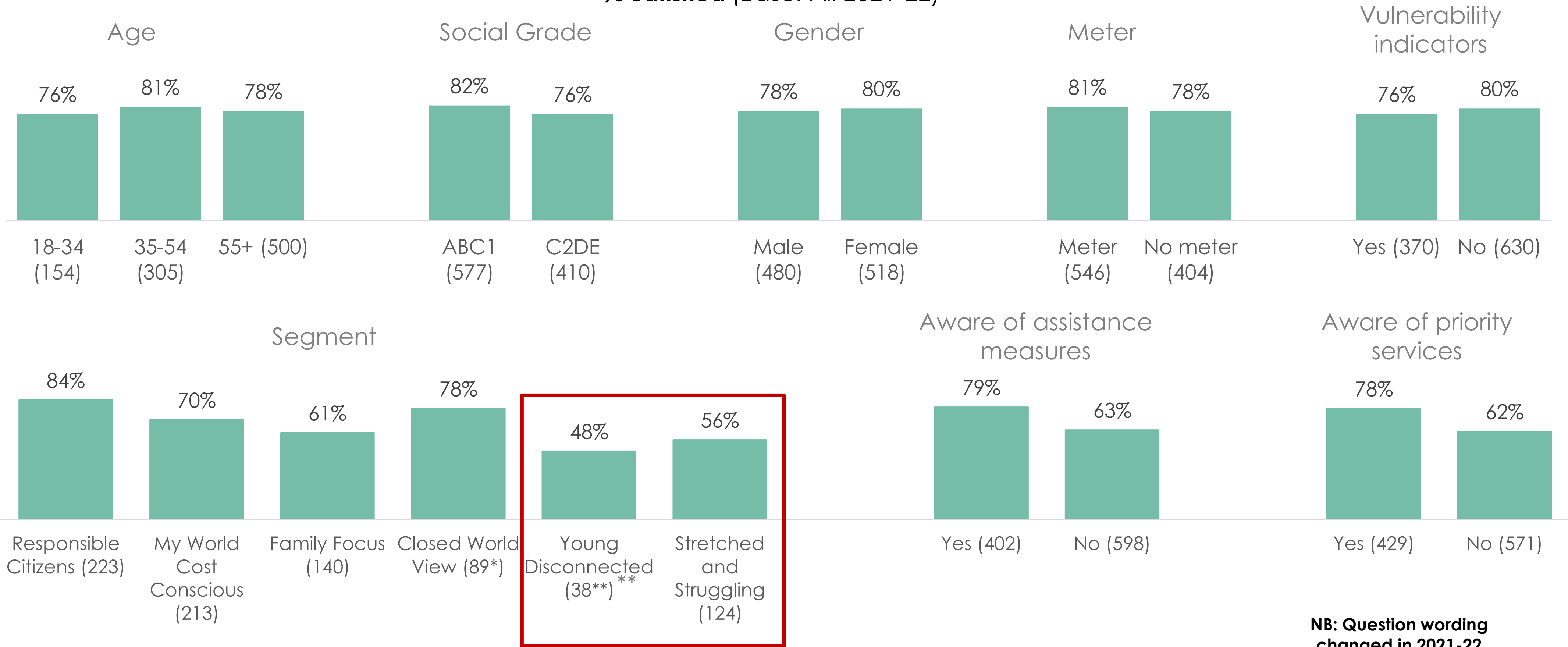


Appendix 1 – subgroup analysis

Overall satisfaction by key groups 2021-22

Satisfaction is reasonably consistent across demographic groups, those with and without a meter, and those with and without vulnerability indicators. ‘Stretched and struggling’ and ‘Young Disconnected’ segments are those where most attention is needed to try and build satisfaction.

Q15 Taking everything into account how satisfied are you with Wessex Water?
% Satisfied *(Base: All 2021-22)*



NB: Question wording changed in 2021-22

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

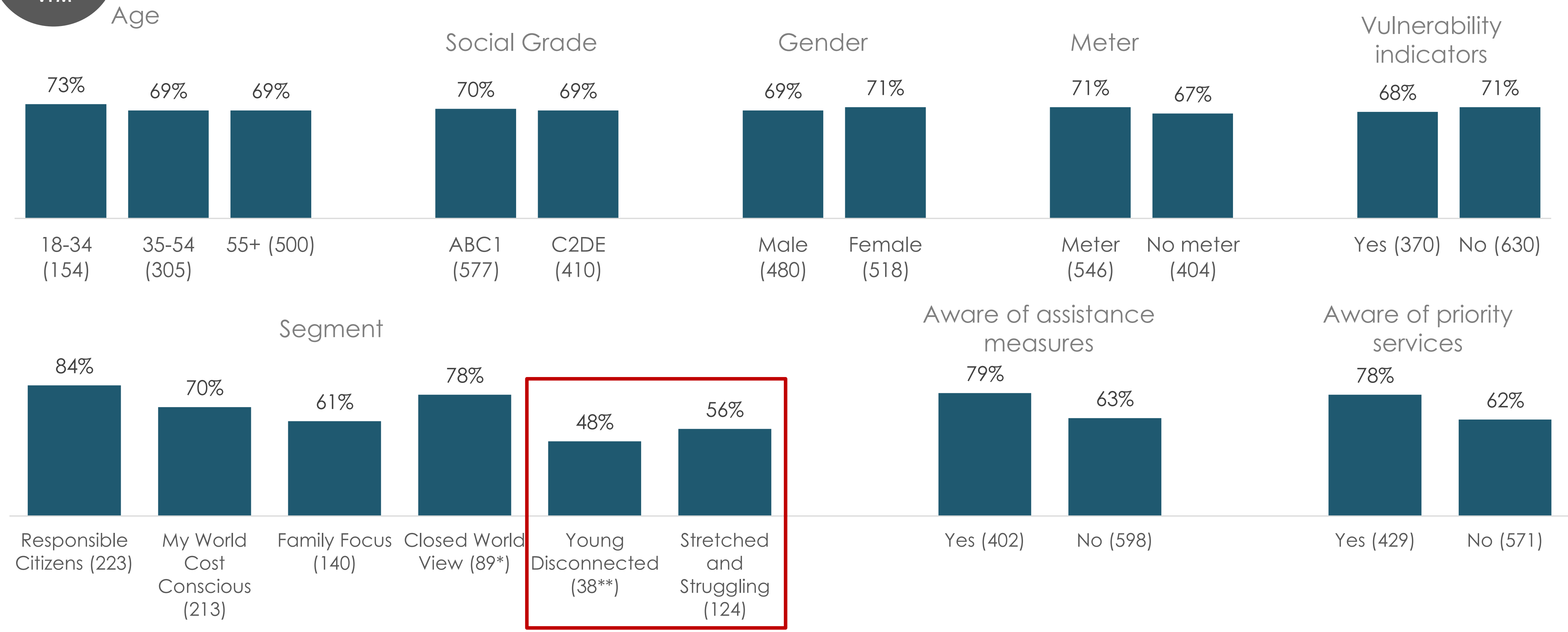
Value for money by key groups 2021-22

Responsible Citizens have the most favourable view of value for money, whereas Stretched and Struggling and Young Disconnected are not as positive. Being aware of support appears to boost value for money perceptions.

VFM

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 2021-22*

% Very or fairly satisfied



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

Wessex Water priorities by segment 2021-22

	TOTAL (1,000)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84*)	Young Disconnected (34**)	Stretched & Struggling (112)
Ensuring a reliable water supply	9.3	9.7	9.4	9.1	9.6	9.1	9.0
Preventing sewage leaks into / entering rivers and the environment (1)	9.0	9.5	9.2	8.8	9.3	8.7	8.8
Giving great customer service	8.8	9.2	9.0	8.6	9.0	8.4	8.3
Investing to address future extremes in weather like drought and flooding	8.5	9.0	8.8	8.2	8.7	8.5	8.1
Improving local habitats for plants and animals	8.1	8.5	8.3	7.5	8.1	7.7	7.7
Reducing their own carbon emissions	8.1	8.4	8.4	7.6	8.1	7.7	7.7
Supporting customers who struggle to pay their bills	8.1	8.2	8.4	7.6	8.0	7.5	8.0
Being innovative and quick to launch new technologies	7.6	8.1	7.9	6.9	7.7	7.2	7.5
Promoting social equality and equal opportunities	7.5	7.7	8.1	6.7	6.9	6.6	7.0
Working in communities - for example volunteering	7.1	7.3	7.7	6.5	6.7	6.2	6.7

(1) New wording introduced part way through Quarter 3 fieldwork.

0.5+ ABOVE TOTAL | **0.4 ABOVE TOTAL** | **WITHIN +/-0.3 OF TOTAL** | **0.4 BELOW TOTAL** | **0.5+ BELOW TOTAL**

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 2021/22*

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

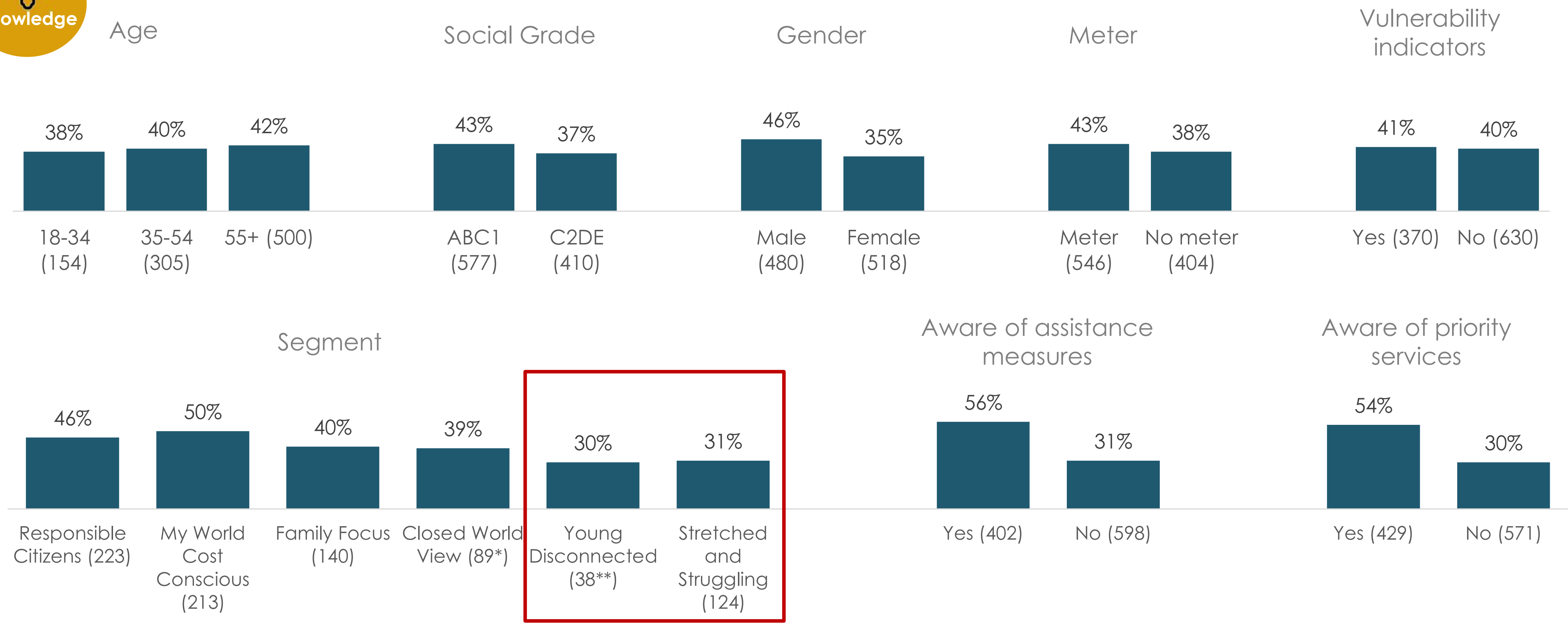
Knowledge by key groups 2021-22

Across the board there is a large opportunity to grow knowledge about Wessex Water and what they do. There is a notably variation in knowledge between different segments – under one third of 'Young Disconnected' and 'Stretched and Struggling' feel that they know about Wessex Water. This is the first hurdle to building a relationship with them.

Knowledge

Q6 How much do you feel you know about Wessex Water and what they do? (Base: All 2021-22)

% Know a lot or a fair amount



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

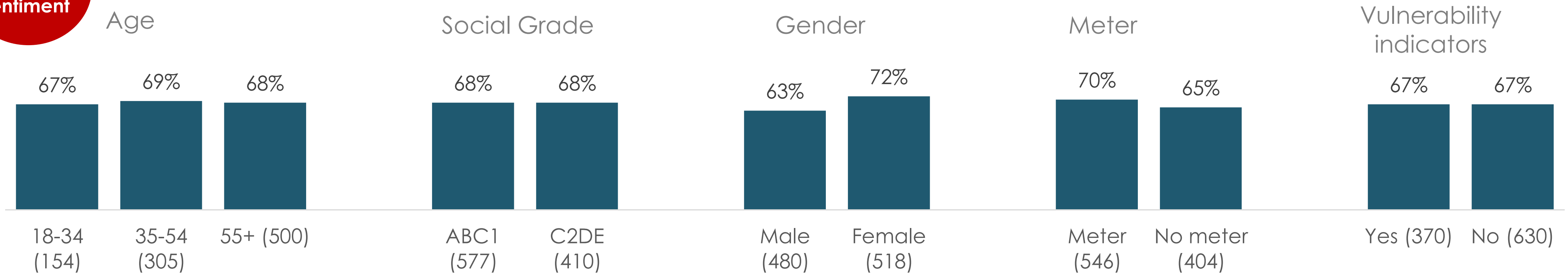
Sentiment by key groups 2021-22

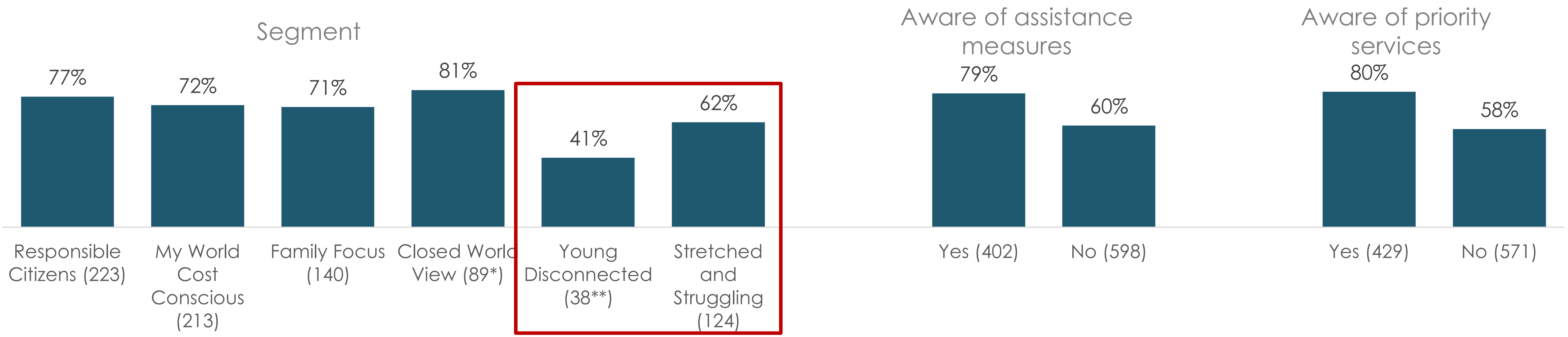
Sentiment towards Wessex Water is much stronger for those aware of assistance and priority measures. There is also a noticeable difference between certain segments (attention needed for 'Stretched & Struggling and 'Young Disconnected' segments).

Sentiment

Q4. Now thinking about Wessex Water. Please tell us how do you feel about them overall? *(Base:* All 2021-2)

% Fairly/Very positive





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

Wessex Water imagery by segment 2021-22

Indications that Responsible Citizens are above average for rating Wessex Water as providing exceptional service, and actively caring about them and their community. Stretched and Struggling however do not have this strength of association – they are slightly less inclined to think Wessex provide exceptional service and care – although they are not dramatically adrift of other segments.

	TOTAL (1000)	Responsible Citizens (223)	My World and Cost Conscious (213)	Family Focus (140)	Closed World View (89*)	Young Disconnected (38**)	Stretched & Struggling (124)
Provide exceptional service	68%	75%	73%	64%	73%	52%	62%
They are easy to contact	62%	66%	66%	67%	67%	51%	60%
Fix any problems	61%	63%	67%	62%	60%	50%	58%
Care about the environment	58%	57%	60%	59%	64%	50%	55%
They are well regarded in your community	54%	54%	60%	55%	51%	37%	51%
Care about you and your community	53%	60%	54%	54%	55%	41%	47%
An open and transparent company	52%	54%	55%	51%	54%	45%	57%
A responsible and ethical company that does the right thing	52%	54%	55%	52%	57%	43%	50%
Innovative and technologically advanced	45%	44%	47%	47%	45%	39%	43%

9% + ABOVE TOTAL | 6-8% ABOVE TOTAL | WITHIN +/-5% OF TOTAL | 6-8% BELOW TOTAL | 9% + BELOW TOTAL

Q8: Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? (% Agree 7-10) *(Base: all respondents)*

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

Wessex Water performance by segment 2021-22

Responsible Citizens are likely to have a high view of Wessex Water's performance in nearly all areas. This is in contrast to the Stretched and Struggling group who are rate Wessex Water's performance notably lower in most areas.

	TOTAL (1000)	Responsible Citizens (223)	My World and Cost Conscious (213)	Family Focus (140)	Closed World View (89*)	Young Disconnected (38**)	Stretched & Struggling (124)
Making it straightforward for you to pay your bill in the way you prefer (bill payers only)	88%	94%	90%	84%	90%	77%	80%
Reliability of their services	82%	91%	84%	82%	84%	71%	74%
Providing clear and easy to understand information	75%	86%	77%	72%	84%	66%	69%
Making it easy for you to deal with them	68%	75%	70%	68%	73%	60%	73%
The range of methods through which you can contact them	67%	73%	71%	67%	75%	60%	66%
Keeping you up to date with their work in your area	67%	77%	70%	60%	74%	53%	61%
Helping you to save water (Wessex supply area only)	59%	65%	65%	57%	66%	39%	52%
Helping you to prevent sewer blockages	48%	52%	52%	43%	46%	39%	48%

9% + ABOVE TOTAL | 6-8% ABOVE TOTAL | WITHIN +/-5% OF TOTAL | 6-8% BELOW TOTAL | 9% + BELOW TOTAL

Q13. How would you rate Wessex Water's performance in the following areas? % rating 7-10 (10 = 'excellent' 0 = 'very poor'). *Base: All respondents 2021-2*

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

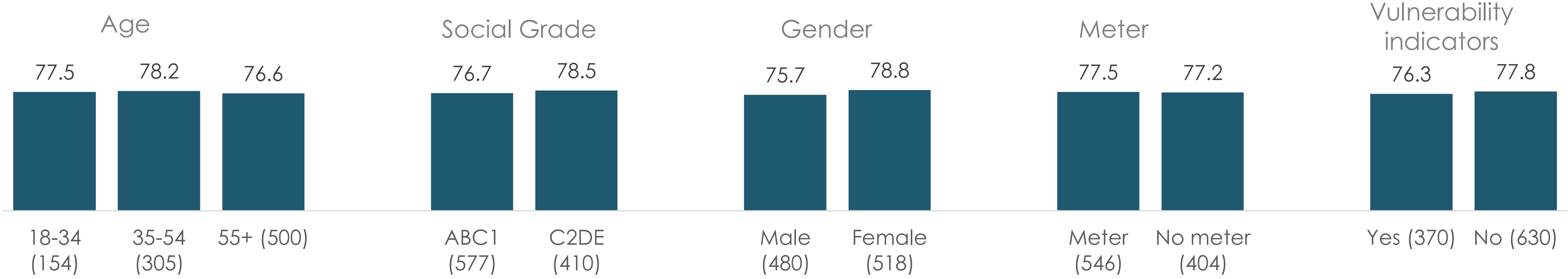
Trust Index 2021-22

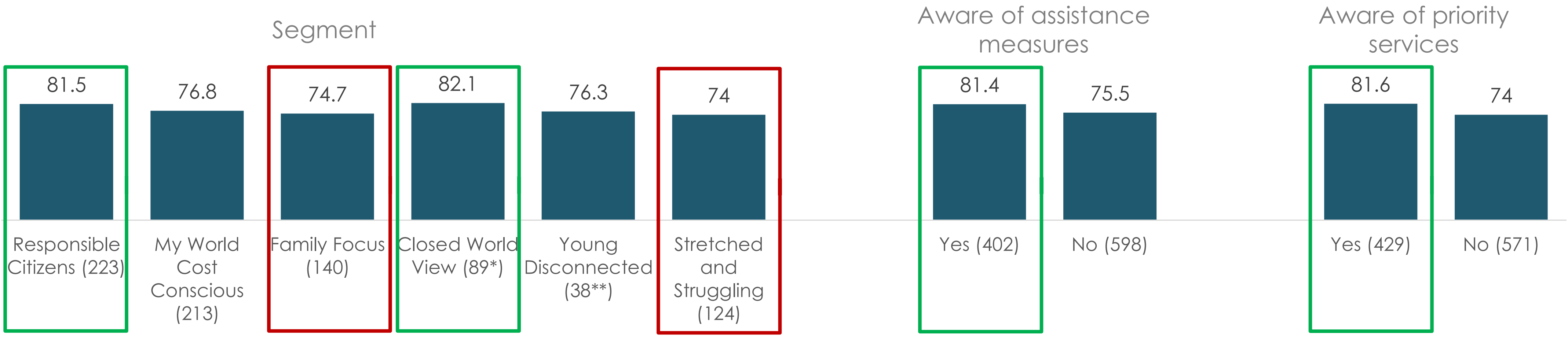
Trust

Trust is reasonably consistent amongst demographic groups, although varies by segment - greatest scope to improve for 'Stretched & Struggling' (particularly in the dimension of reliability and dependability) and 'Family Focus'. Awareness of assistance and priority services is positively related to trust.

Overall Trust Index: 77.3

TRUST INDEX *(Base: All 2021-22)*
Score out of 100





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

How hear about local information or news by segment 2021-22

Responsible Citizens, My World Cost Conscious and Family Focus are all more attuned to local events through a range of media channels, notably Facebook local community groups and Facebook feeds. Meanwhile the other segments are much less likely to use social media for local information.

	TOTAL (1000)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84)	Young Disconnected (34**)	Stretched & Struggling (112)
Word of mouth	67%	69%	68%	67%	67%	62%	62%
Community publications or websites	45%	53%	51%	50%	38%	37%	29%
Facebook local community groups	42%	46%	54%	54%	14%	9%	19%
Facebook feed	38%	39%	48%	43%	9%	20%	22%
Local newspaper online	37%	34%	45%	43%	36%	33%	26%
Local radio	35%	31%	36%	31%	37%	41%	33%
Local newspaper in print	33%	30%	36%	35%	32%	21%	23%
Instagram	15%	11%	20%	12%	2%	-	7%
YouTube	12%	9%	19%	9%	2%	4%	5%
Anywhere else on social media	12%	14%	17%	6%	7%	11%	10%
AVERAGE NO. OF LOCAL SOURCES	**3.4**	**3.4**	**3.9**	**3.5**	**2.4**	**2.4**	**2.4**

9% + ABOVE TOTAL | **6-8% ABOVE TOTAL** | **WITHIN +/-5% OF TOTAL** | **6-8% BELOW TOTAL** | **9% + BELOW TOTAL**

Q21: Now thinking more broadly, in general, how do you hear about local information or news in your area? **Base**: All respondents 2021-2

KEY: * Caution low base size ** Caution very low base size. Figures are % selecting

Information interested in receiving by segment 2021-22

My World Cost Conscious in particular have a Disconnected bigger and more varied appetite for information from Wessex Water, and Responsible Citizens are also more interested than average. Young Disconnected and Stretched and Struggling generally have less interest.

	TOTAL (1000)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84)	Young Disconnected (34*)	Stretched & Struggling (112)
Alerts about water services in your area	75%	82%	85%	78%	71%	54%	69%
How they are protecting the environment	68%	74%	83%	73%	65%	38%	51%
Practical advice like water saving, cold weather advice and preventing sewer blockages	64%	70%	75%	64%	64%	38%	63%
How they are investing in your area	65%	71%	76%	73%	63%	33%	48%
Community projects they are funding	52%	62%	65%	51%	43%	25%	30%
Recreational activities at their local sites e.g. reservoirs	47%	54%	60%	48%	38%	22%	32%
How to get community funding support from Wessex Water	36%	32%	48%	33%	19%	17%	27%
Information about jobs and opportunities at Wessex Water	27%	21%	36%	25%	12%	14%	20%

9% + ABOVE TOTAL | 6-8% ABOVE TOTAL | WITHIN +/-5% OF TOTAL | 6-8% BELOW TOTAL | 9% + BELOW TOTAL

Q22: What sort of information would you be interested in receiving from Wessex Water? **Base:** All respondents 2021-2

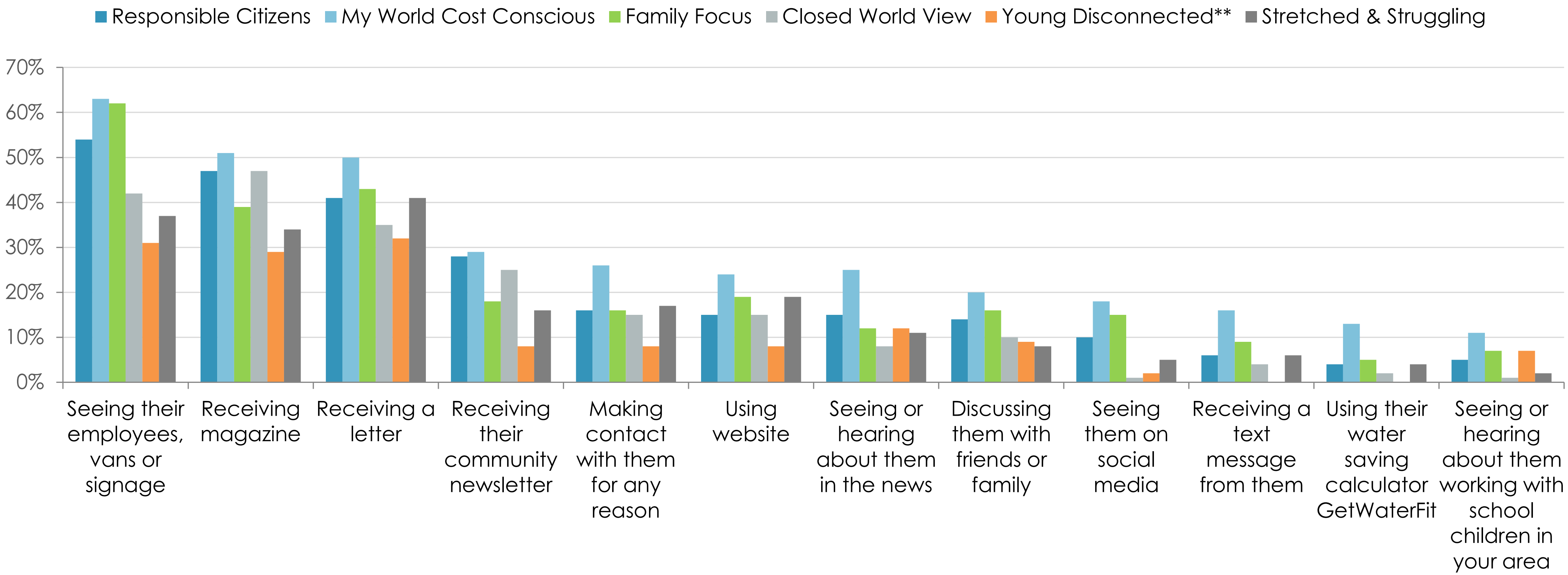
KEY: * Caution low base size ** Caution very low base size. Figures are % selecting

Prompted recall of Wessex touchpoints by segment (2021-22)

'My World Cost Conscious' are notably high in recalling Wessex Water communications across the board. 'Closed World View' relatively receptive to the magazines and community newsletters. 'Stretched and Struggling' have relatively high use of the website, but less likely than most to recall seeing Wessex Water presence outdoors, or receiving the magazine (low general involvement).

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

Base: All respondents 2021-22 in each segment



Base sizes (2021-22): Total (1,000); RC (223); MW&CC (213); FF (140); CWV (89); S&S (124); YD (38**) KEY: * Caution low base size ** Caution very low base size

Appendix 2 – segment profile update 2021-2

Segment profile 2021-2

		1. Responsible Citizens	2. My World & Cost Conscious	3. Family Focus	4. Closed World View	5. Young Disconnected*	6. Stretched & Struggling
HOW DEFINED?	Water saving	HIGH	HIGH	LOW	HIGH	LOW	HIGH OR LOW
	Community	HIGH	HIGH	HIGH	LOW	LOW	LOW
	Bill affordability	HIGH	LOW	HIGH OR LOW	HIGH	HIGH	LOW
SIZE	Proportion of Wessex Water bill payers	27%	26%	17%	10%	5%	15%
DEMOGRAPHICS	Age (above average for)	55+	35-64	25-34	65+	25-34	35-54
	Gender Female: Male	51:49	54:46	51:49	49:51	47:53	48:52
	Social Grade (above average for)	AB	Average	C2	DE	DE	DE
PROFILING	Vulnerability	26%	46% (highest)	33%	33%	40%	36%
	Have meter (based on those who know if they do or not)	58%	63%	51%	61%	58%	58%
RELATIONSHIP WITH WESSEX	VFM	84%	70%	61%	78%	48%	56%
	Very satisfied	49%	42%	42%	51%	42%	37%
	Recall magazine	47%	51% (highest)	39%	47%	29% (low)	34% (low)
	Contact	16%	26% (highest)	16%	15%	8% (lowest)	17%
WIDER ATTITUDES	Environmentally minded (9 or 10)	48% (high)	48% (high)	22%	26%	17% (lowest)	22%
	'More online services better' (rate 9 or 10)	44%	42%	34%	36%-	37%	25% (lowest)

Wessex Water YTL GROUP

Segment sizes over time

% of Wessex Water customers (bill payers) in each segment

Segment	2017-18, 2018-19 & 2019-20 (Pre-Covid)	2020-21 (Covid)	2021-22
Responsible Citizens	32%	27%	27%
My World Cost Conscious	22%	26%	26%
Family Focus	19%	18%	17%
Closed World View	8%	11%	10%
Young Disconnected	4%	4%	5%
Stretched and Struggling	15%	13%	15%

Responsible Citizen segment reduced in size post-Covid. Upheaval in personal financial situations and changing involvement in the community likely to have resulted in some individuals moving segments

My World Cost Conscious segment grew the most post-Covid – indicating that some Responsible Citizens may have become less confident about bills over this period, transferring to this segment

Closed World View segment has grown slightly post-Covid and has become slightly older in profile

Appendix 3 – Bill payers and non-bill payers 2021-2

Bill payers versus non-bill payers: Awareness and attitudes 2021-22

	Total (1,000)	Bill payers (827)	Non bill payers (173)
DON'T KNOW who provides water	13%	9%	31%
Awareness that Wessex provides sewerage service	61%	67%	38%
Satisfied (7-10)	79%	81%	70%
Positive sentiment to Wessex (7-10)	67%	71%	52%
Know a lot / a fair amount about Wessex	40%	42%	34%
Priorities Non bill payers **lower ratings** in general ***except for*:** Helping customers who struggle to pay their bill, reducing carbon emissions; being innovative; promoting social equality; working in communities			
Image statements Non-bill payers lower for 'They are easy to contact'			
Performance statements Non-bill payers **lower rating** in general ***except for***: Keeping you up to date; Helping you to prevent sewer blockage; Helping you to save water			
Agree charges acceptable	65%	69%	51%
Aware of bill assistance	40%	41%	35%
Aware of PSR	42%	45%	30%
Information interested in receiving from Wessex: Non bill payers lower for alerts; practical advice; how they are protecting the environment. Higher for 'how to get community funding support' and 'info about jobs and opportunities at Wessex'.			

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS

Bill payers versus non-bill payers: Touchpoints and demographics 2021-22

	Total (1,000)	Bill payers (827)	Non bill payers (173)
How hear about local info: Non bill payers higher for: Facebook feed; Facebook local community groups; Instagram; You Tube			
Made contact with Wessex for any reason in last 6 months?	19%	18%	21%
Used Wessex website in last 6 months?	18%	18%	16%
Recall receiving magazine in last 6 months?	40%	44%	27%
Recall seeing or hearing about Wessex in the news	17%	16%	21%
Happy to share personal data to get better service (agree)	48%	48%	51%
Agree 'the more services I can access online the better'	66%	65%	71%
Agree 'I'd be interested in having a smart water meter'	35%	34%	35%
Agree 'I often look for new ways to reduce my impact on the environment'	65%	67%	60%
Social Grade: ABC1	58%	58%	57%
Social Grade: C2DE	41%	41%	40%
18-34 years old	25%	19%	47%
35-54	30%	30%	28%
55+	41%	46%	22%

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS

Appendix 4 – Key Driver Analysis Detail

Key driver analysis 2021-22

Scope of the analysis

Wessex Water asked Blue Marble to conduct a key driver analysis using the first year of data for the revised tracking survey (2021-2) on two measures:

- Overall satisfaction with Wessex Water (Q11)
- Sentiment associated with Wessex Water (Q4)

There were no a priori assumptions about which variables were likely to be the drivers. Almost all questions were entered at the start of the linear regression modelling and those with low associations were removed step by step until only those with a strong independent link remained

Mixed method data

The survey is mixed method: CATI and CAWI and it is evident that there is method bias in answers to some questions. The modelling was therefore run three times: separately for CATI and CAWI and then a single model for the total sample.
The ideal was a single model that was appropriate for both methods. However, the modelling was started on the assumption that separate models were going to be needed. Only once the process had been completed separately for the two methods was an assessment made on whether a single model was feasible

Variables included

Qs 2, 6, 7, 8, 13, 18, 19, 20, 21, 22, 23, 24, 26, 27, F1, F2, F3, F4, F5

- Note Q19/20 was simplified to binary variables – yes v other

A separate assessment was made of questions directed to bill payers only: Q13r1, 15, 16, 17,
Separate runs were also made for the rotating section: F1 r5, 6, 7, F1b, c, d

Analysis of 'don't know'

Initial modelling was run excluding 'don't knows' from scale questions. However, this reduced the available sample and removed respondents who otherwise had given perfectly acceptable responses. Consequently 'don't know' answers to scale questions were replaced with the median rating. This did not affect the variables that came to the fore and created a stronger model (more variance explained) due to the larger sample size

Key driver analysis 2021-22

Notes on additional runs

A separate assessment was made of questions directed to bill payers only: Q13r1, 15, 16, 17

- **Q16 – value for money** was a strong predictor of satisfaction / sentiment for Q11
- However, this largely overrode the contribution of Q18
- Adding it improved the amount of variance explained to 57% but this is not a substantial increase and it meant that the modelling would have to be based on the sub-sample of bill payers only. This was a decrease to the value of the model and the decision was made to not add this variable

Separate runs were also made for the rotating section F1 r5, 6, 7, F1b, c, d

- None of these added any value to the model for Q11 (satisfaction)
- F1c releases from storm overflows or CSOs into rivers or the sea added to Q4 (sentiment) by increasing the amount of variance explained from 43% to 46%. However, as the modelling would therefore have to be based on only half the sample, this was not thought to be a worthwhile step. Those aware of CSOs had a lower sentiment score at Q4.

Drivers of satisfaction - summary

Objective

Satisfaction

Which measures in the tracker, if any, are statistically linked to higher / lower satisfaction (implicit drivers)?

Method

Data from the **last full year (2021-2)** of the tracking survey was used in a **linear regression** key driver analysis. Analysis was performed independently for online and telephone interviews, and then combined, to explain what drives satisfaction overall.

Key results

1

Satisfaction is, as we might expect, strongly related to value for money amongst bill payers.

For the final analysis, we removed the value for money variable, along with sentiment to Wessex, to isolate other, actionable variables that drive satisfaction.

2

In the final analysis 6 variables make up the strongest factor driving satisfaction:

1 'Reliability of their services'
2 'Water & sewerage charges acceptable'
3. 'Care about the environment'
4. 'Well regarded in community'
5. 'Range of methods can contact them'
6. 'Provide clear & easy information'

More influence

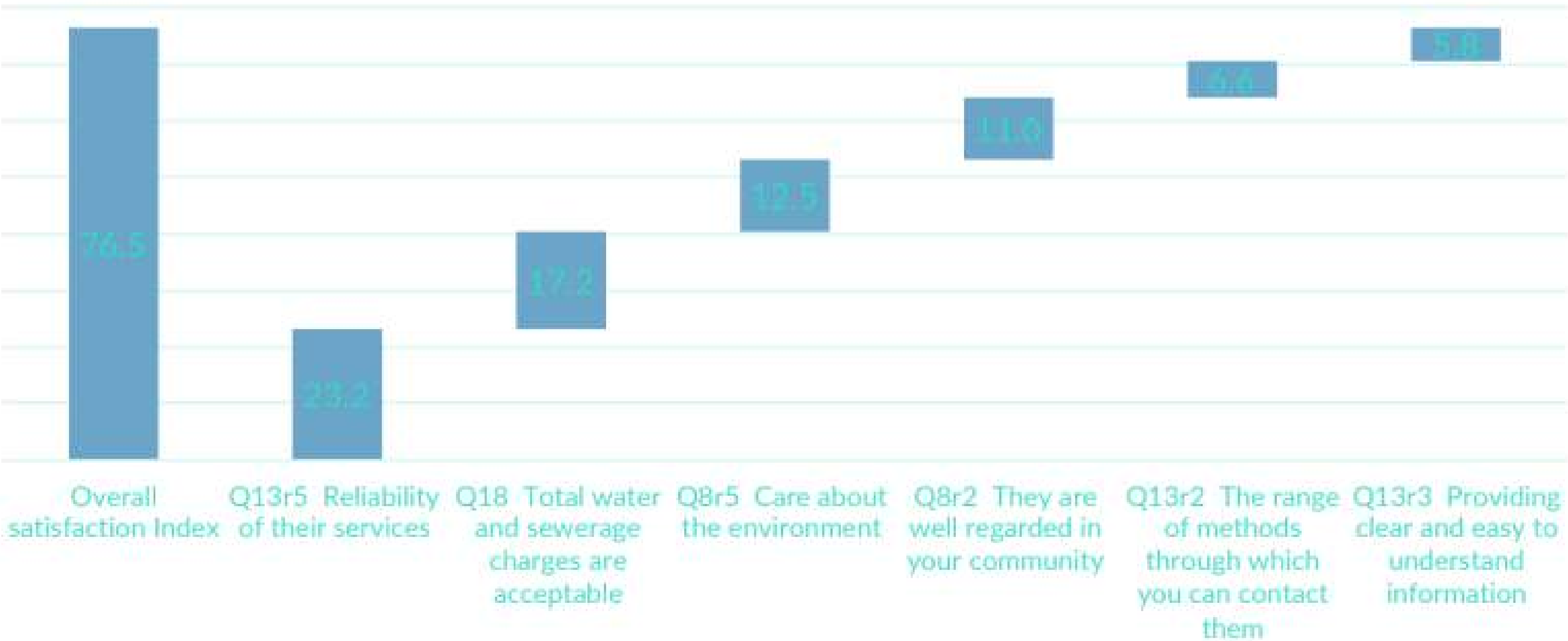
In total these account for 50% of the variance of 'satisfaction'

Take out

Along with the pre-requisite needs to feel satisfied with the value offered by Wessex Water, reliability of services is critical for satisfaction. Beyond these are a combination of more emotive drivers ('care about the environment' and 'well regarded in the community') plus more rational drivers 'range of methods through which you can contact them' and 'providing clear and easy to understand information'.

Drivers of satisfaction – contribution of each variable to the model

Satisfaction



Drivers of sentiment - summary

Objective

Sentiment

Which measures in the tracker, if any, are statistically linked to positive / negative sentiment to Wessex (implicit drivers)?

Method

Data from the **last full year (2021-2)** of the tracking survey was used in a **linear regression** key driver analysis. Analysis was performed independently for online and telephone interviews, and then combined, to explain what drives sentiment overall.

Key results

1

Sentiment is, as we might expect, strongly related to value for money amongst bill payers.

For the final analysis, we removed the value for money variable, along with overall satisfaction with Wessex Water, to isolate other, actionable variables that drive sentiment to Wessex Water.

2

In the final analysis 7 variables make up the strongest factor driving sentiment:

1. How much feel know about Wessex
2. 'Water & sewerage charges acceptable'
3. 'Well regarded in community'
4. 'Reliability of their services'
5. 'Open and transparent company'
6. 'Making it easy for you to deal with them'
7. 'Provide clear and easy information'

More influence

In total these account for 43% of the variance of 'sentiment'

Take out

Sentiment is notably driven by **knowledge** of Wessex. This enforces how engagement is key to building a positive feeling about the brand, through increasing knowledge and familiarity. In addition, corporate **transparency** is an underlying driver influencing positivity (which is not present for the key drivers of satisfaction).

Drivers of sentiment – contribution of each variable to the model

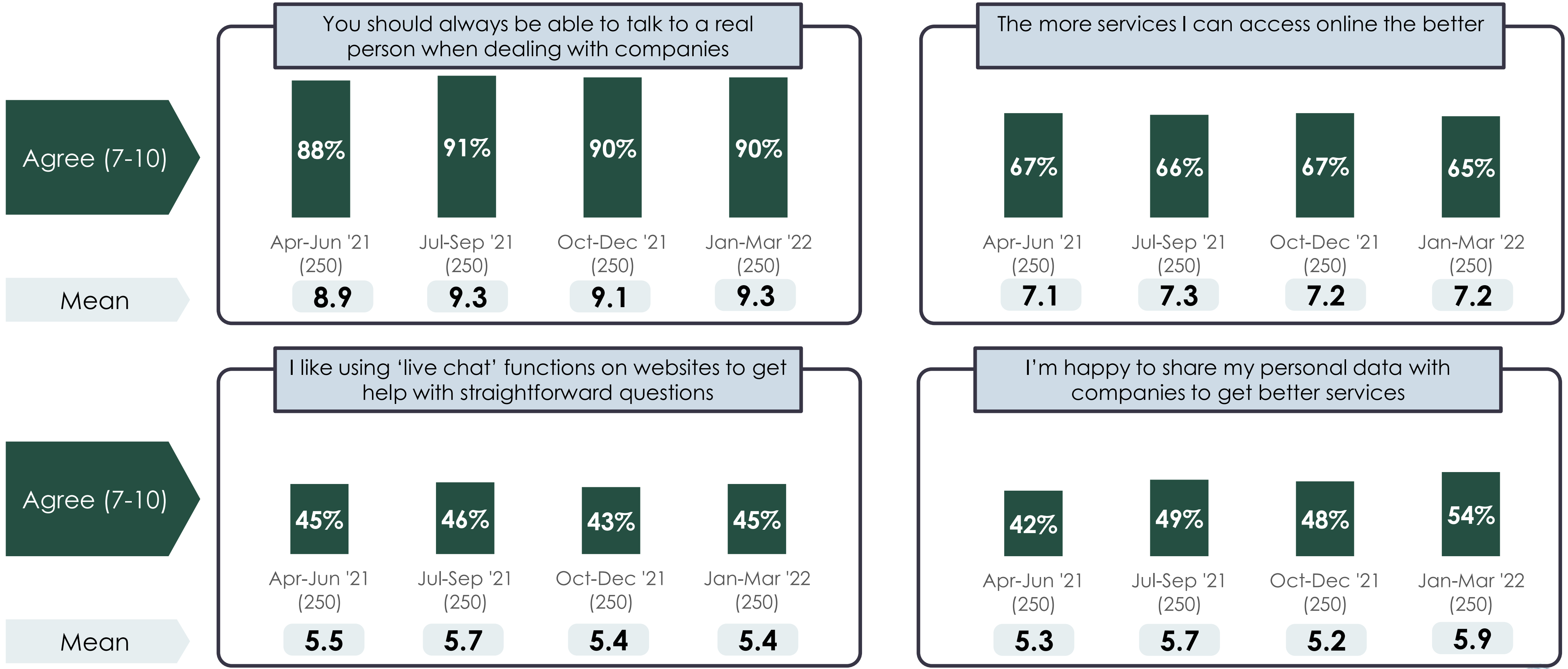
Sentiment

Appendix 5 – Attitudes to interaction

Attitudes to interaction 2021-22

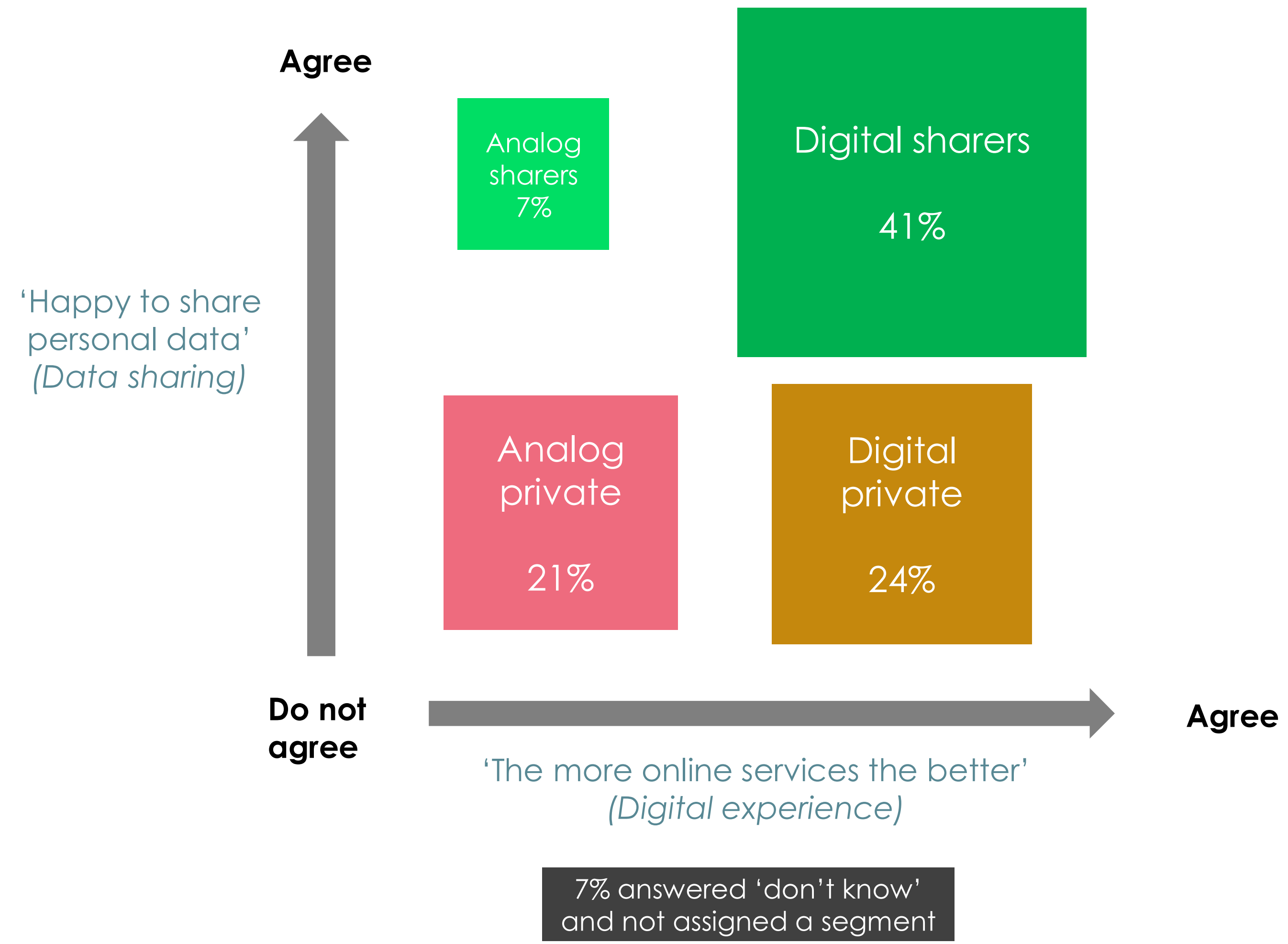
Even though there's interest in receiving alerts about water services, many people remain reticent about sharing their personal data with companies – although signs of a gradual shift to be more amenable to this to get better services .

Q24. Thinking generally, how much would you agree or disagree with the following statements? *Base: All respondents*



Attitudes to interaction 2021-22

Using two questions we are able to construct a simple segmentation of Wessex Water consumers by their attitudes to digital transactions.



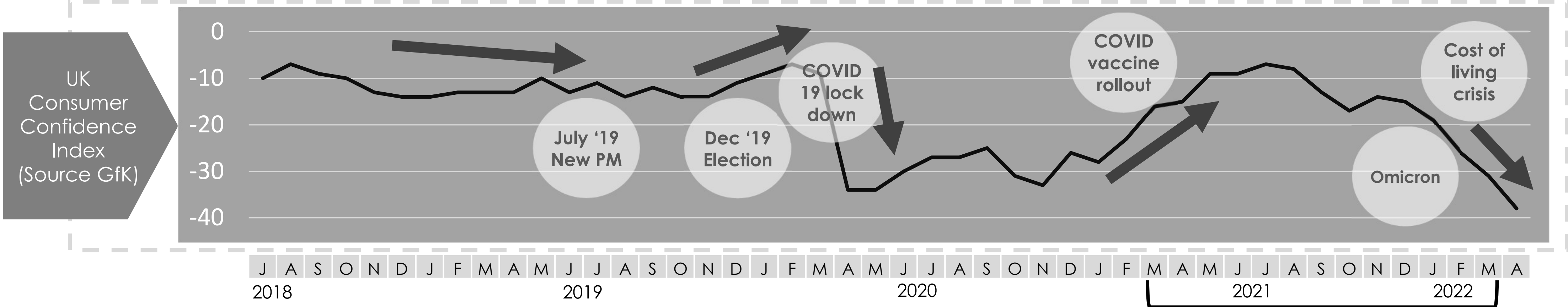
The segmentation helps understand the distribution of the consumer base in terms of the kind of relationship they are ready to have with Wessex Water:

- 4 in 10 are responsive to open, two-way digital engagement and conversations, more interested in being 'in touch' and very comfortable with data and personalised transactions on digital channels; younger & particularly interested in smart water meters.
- Around 1 in 4 expect and appreciate digital channels and services but are likely to want more 'arm's length' / one-way communication and are more protective of their personal data; more likely to be women
- Around 2 in 10 are 'traditionally minded' – best approached in ways other than digital channels; tend to be older
- A small minority are currently more comfortable with non-digital channels but happy in principle to share their data – they may be more digitally excluded and require support to be able to transact in more ways

Appendix 6 – Finances and support: Long term trends

By April 2022 consumer confidence is at a near-historic low point.

After rallying through the early part of 2021, consumer confidence nationwide has gone into freefall in the midst of the cost of living crisis.

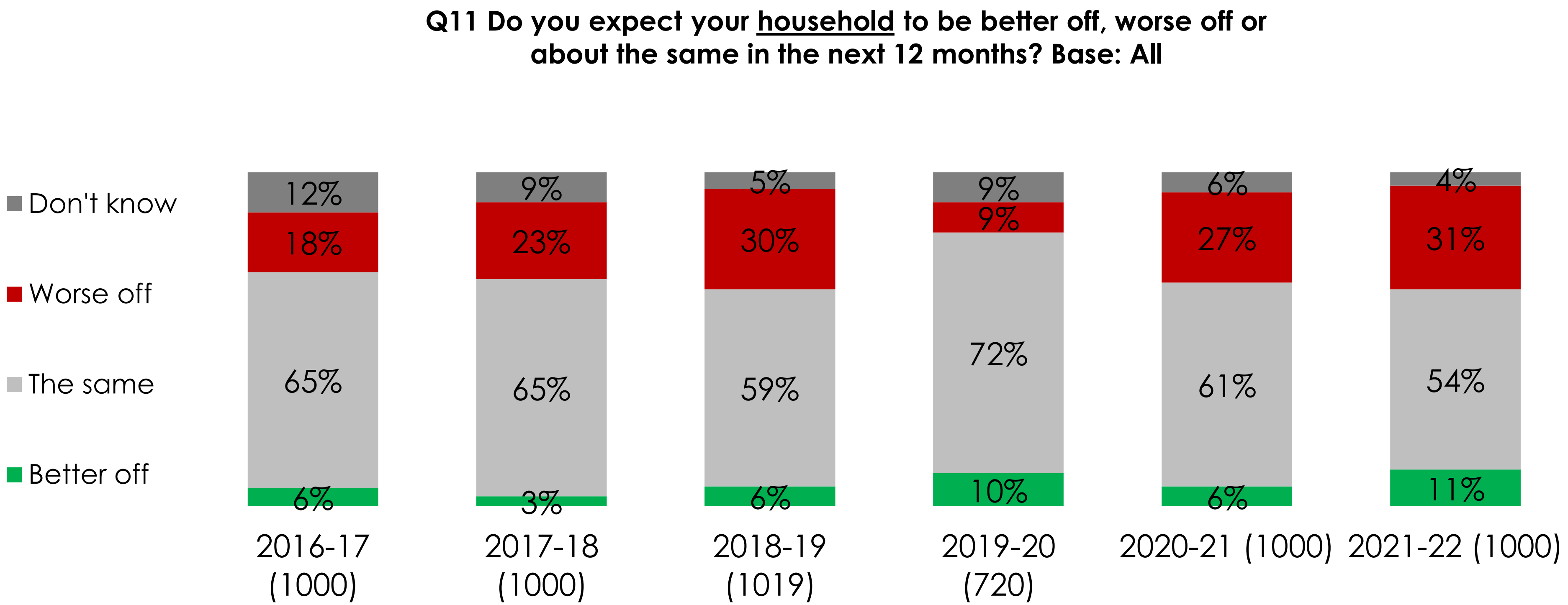


M A M J J A S O N D J F M

- **12 March** Non-essential retail, outdoor social venues (reopen)
- **17 May** Up to 30 people allowed to meet outdoors and indoor social events of up to 6 are allowed
- **4 June** 40 million people receive their first Covid vaccination
- **19 July** Virtually all Covid restrictions lifted, including nightclubs opening
- **1 Aug** 85 million doses of Covid vaccinations administered in the UK
- **15 Sept** Cabinet reshuffle in the UK
- **26 Sept** Panic buying of petrol leads to shortages across UK
- **30 Sept** Last day of furlough scheme
- **31 Oct** COP26 begins in Glasgow
- **8 Nov** Environment Bill passes after long debate over sewage
- **27 Nov** First cases of Omicron detected in UK
- **12 Dec** Photo of No.10 party leaked
- **4 Jan** Record Covid cases with daily infections above 200,000
- **1 Feb** Johnson travels to Kyiv amidst rising tensions in Ukraine
- **3 Feb** Ofgem lifts energy cap as prices soar across the UK
- **18 Feb** Storm Eunice hits UK
- **24 Feb** Russia escalates to full scale invasion of Ukraine

Financial Outlook

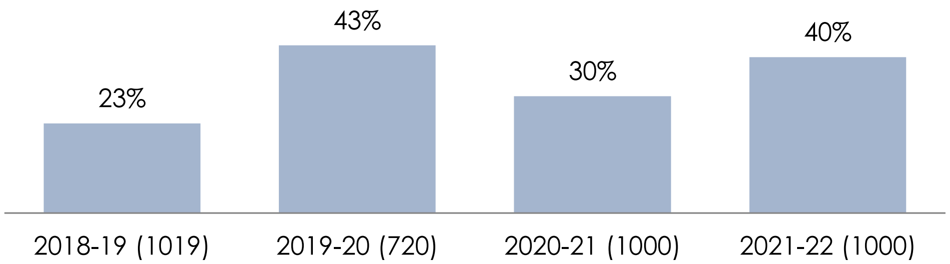
As the national picture for consumer confidence dramatically falls at the time of Covid-19 lockdown, there is also a resurgence of sentiment that household fortunes will decline in the tracking data.



Awareness of Assistance Measures

Awareness of assistance to customers struggling to afford and of priority services both stand at c.4 in 10 this year, broadly in keeping with previous years, although not directly comparable due to change in method. **Those who do not feel charges are affordable are less aware – a need to address this so they may benefit.**

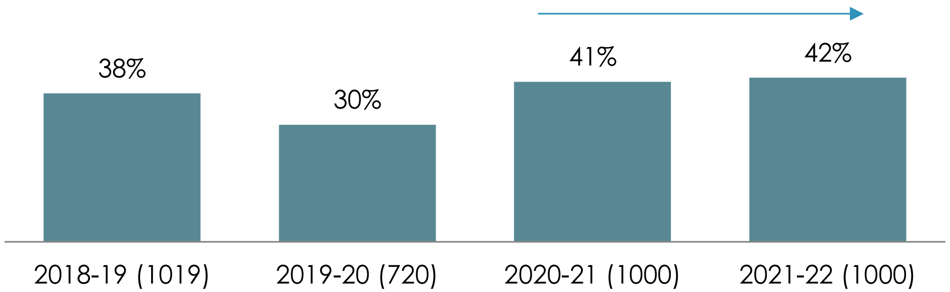
Q20r1: Are you aware of Wessex Water doing any of the following? - **Assisting customers who struggle to afford their water bill** (Base: All respondents)



40%
Aware for 2021-22
(41% of bill payers)

But lower amongst those who disagree charges are affordable (27%) – the group who are the priority to communicate this to.

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)



42%
Aware for 2020-21
(45% of bill payers)

45% of those who exhibit vulnerabilities are aware – still plenty of scope to increase this further

Technical Appendix

Technical Appendix

Statistical Confidence: with a sample size of 1,000 interviews where 30% give a particular answer we can be confident that the 'true' value (which would have been obtained if the whole population had been interviewed) will fall within the range of ± 2.8 percentage points from the sample results.

	Confidence Intervals at or near these percentage levels (at 95% level)		
Total sample size	**10% or 90%**	**30% or 70%**	**50%**
1,000 interviews	**±1.9%**	**±2.8%**	**±3.1%**
500 interviews	**±2.6%**	**±4.0%**	**± 4.4%**
250 interviews	**±3.7%**	**±5.7%**	**±6.1%**
100 interviews	**±5.9%**	**±9.0%**	**±9.8%**

Sub-group comparisons/comparisons over time: we could conclude that the survey results of say 75% in 2013 and 80% in 2014 would almost certainly be statistically significantly different when based on the full sample of 1,000 customers, but would almost certainly not be significant based on sample sizes of 250 each (e.g. Bristol area).

	Differences required for significant at or near these percentage levels (95% confidence limits)		
Size of samples compared	**10% or 90%**	**30% or 70%**	**50%**
1,000 and 1,000	**±2.6%**	**±4.0%**	**±4.4%**
500 and 500	**±3.7%**	**± 5.7%**	**± 6.2%**
250 and 250	**±5.4%**	**±8.2%**	**±9.0%**
100 interviews	**±8.3%**	**±12.7%**	**±13.9%**

- Note that we highlight very small sample sizes (under 50) using '**'. These percentages are indicative only, with caution needed for interpretation
- In some cases actual counts rather than %s are quoted, where sample sizes are too small to be viable to be expressed as %s
- Note that 'net' is used to reference the sum of the %s of the 'top 2' answers on an answer scale (e.g. 'excellent' plus 'good')

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