

Image Tracker 2019-20

Annual presentation
19th May 2020

VFM & Bills

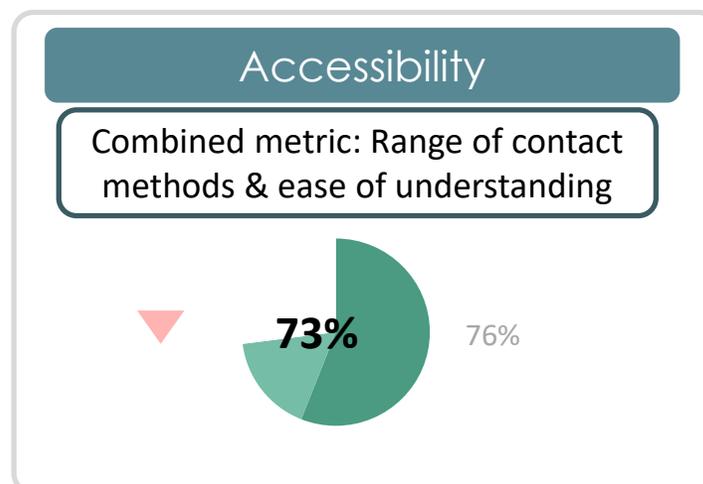
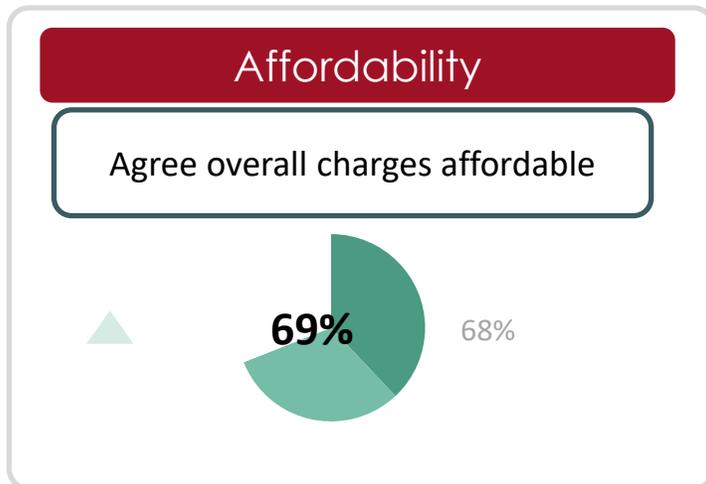
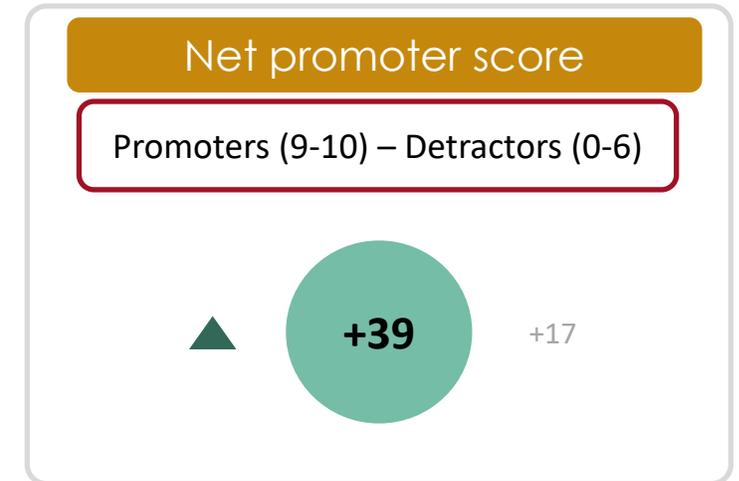
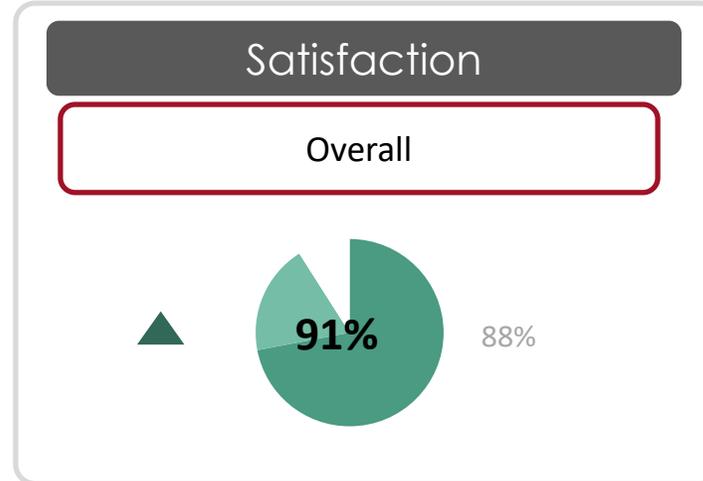
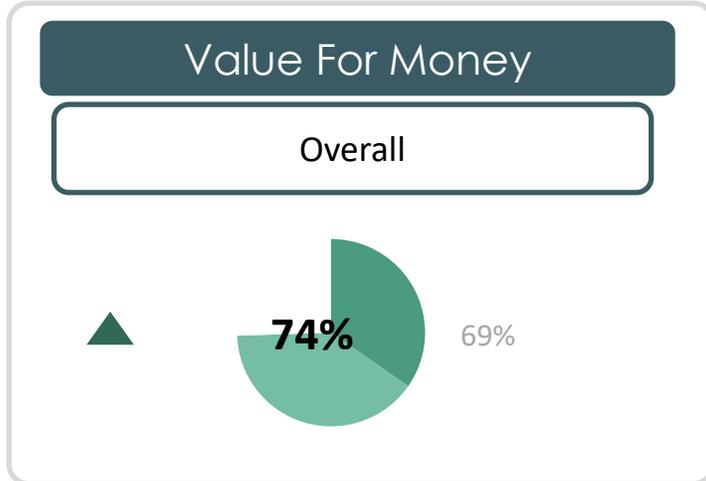
Satisfaction &
NPS

Affordability

Image &
Communication

Summary

- Interviewing for 2019-20 was complete before the onset of COVID19 – the pandemic will have no impact on results
- Value for money has rebounded from a low point last year
- Satisfaction is slightly higher than last year, Net promoter score is up



Key

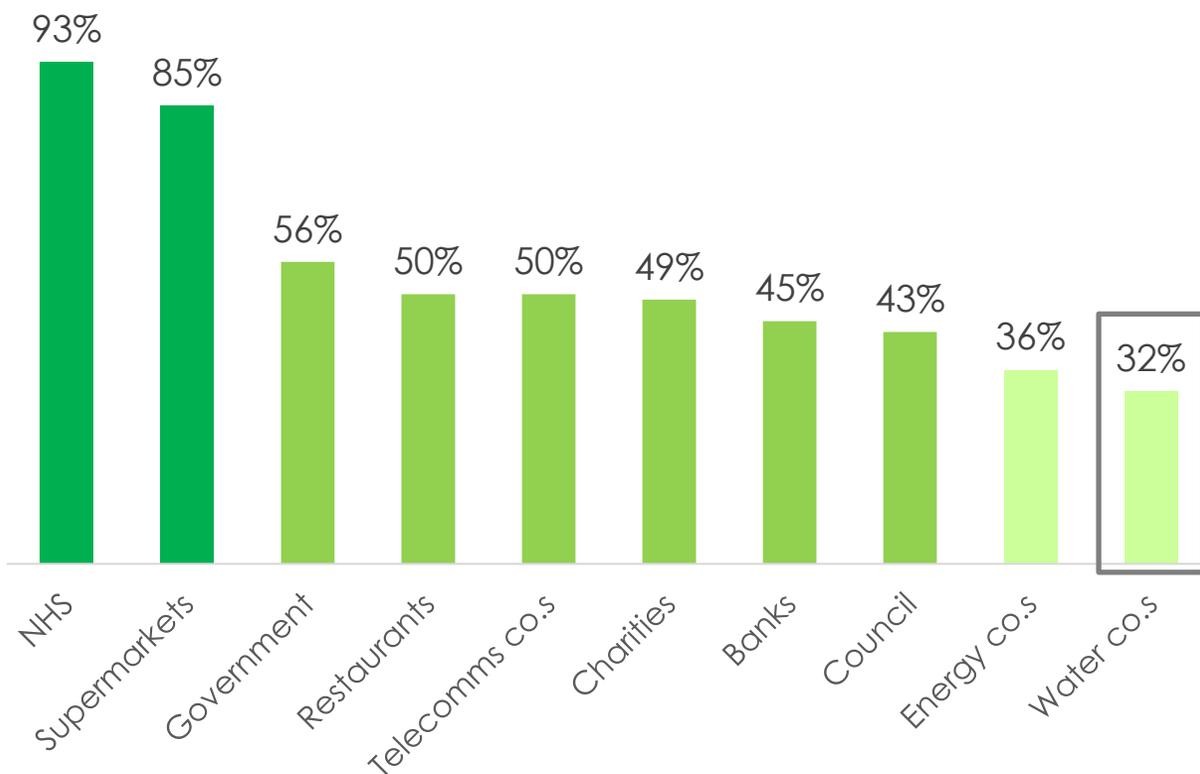
- Excellent / very satisfied / Strongly agree
- Good / fairly satisfied / tend to agree
- ▲ Significant increase
- ▼ Significant decrease
- ▲ Directional increase
- ▼ Directional decrease

xx% = previous year

The changing consumer perspective

- We must be mindful of imminent changes in consumer outlook in light of COVID19
- Our nationwide data from early May shows how water companies, as yet, have been more 'recessive' than organisations in other sectors, and how widespread anxiety and money concerns have become.

How well have...responded to the coronavirus outbreak in the UK?
% 'very well' or 'fairly well'



Thinking about the last month, have you done/felt each of these more, less or about the same as before the coronavirus outbreak?

	More than	About the same	Less than
Feeling uncertain about my future	53%	41%	5%
Feeling stressed	48%	41%	11%
Worrying about money	39%	52%	9%
Exercising regularly	28%	40%	32%
Feeling connected to my local community	27%	54%	19%
Eating healthily	23%	54%	23%

Base: All GB adults aged 18+ (n=2,025). Fieldwork conducted online between 1st May and 3rd May 2020.

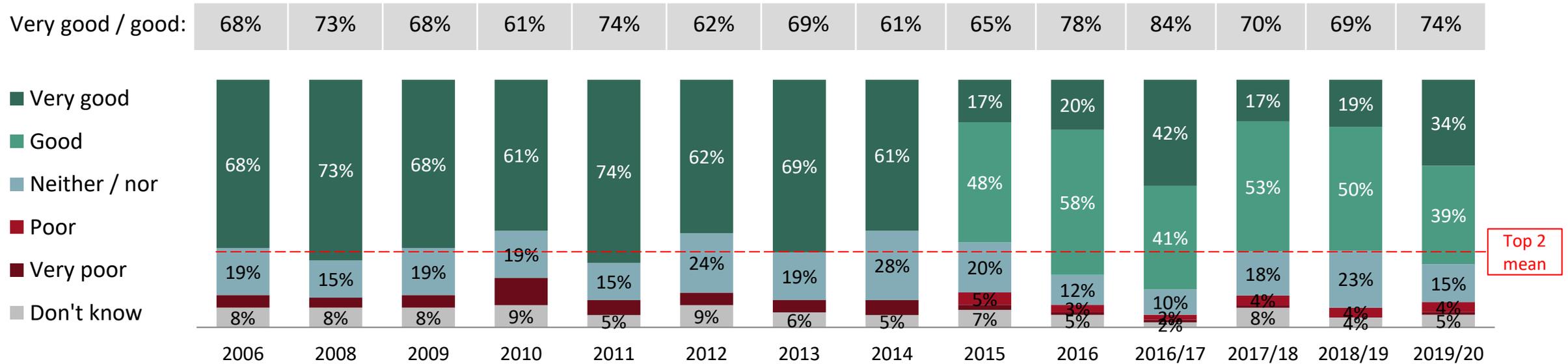


Value for Money and Bills

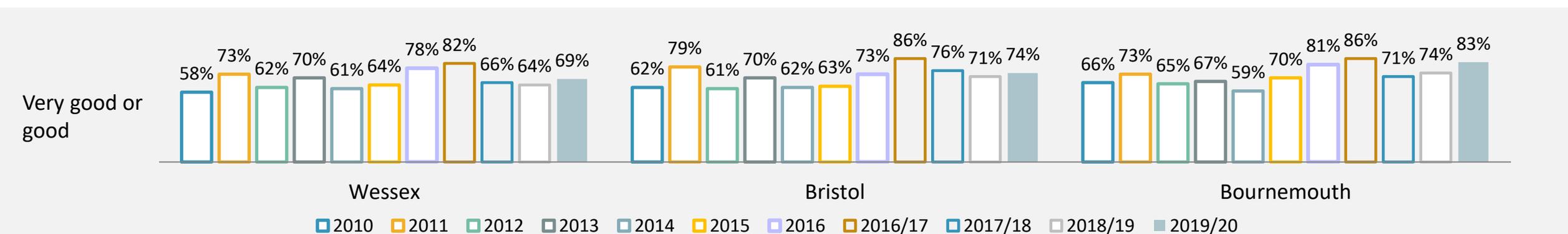
Overall value for money (VFM)

Prior to lockdown, the overall VFM rating for Wessex Water is 74% - higher than last year. There's improvement for all three regions, although the Wessex supply area remains slightly lower than the others (reflecting higher average bills).

Q22 (Q5) How would you rate the drinking water supplies and the sewerage service you receive in your area in terms of value for money? (Base: All)



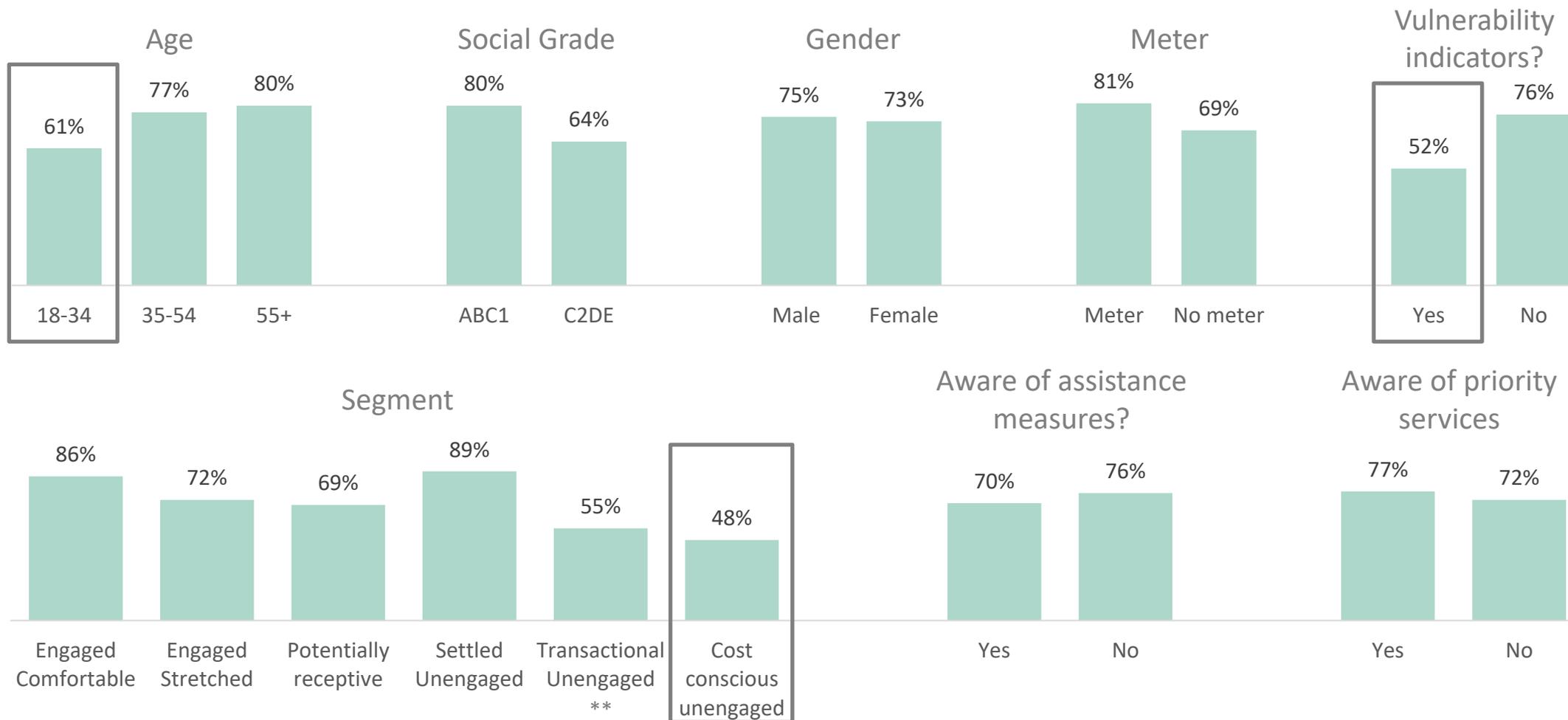
Top 2 mean



Overall VFM by key groups

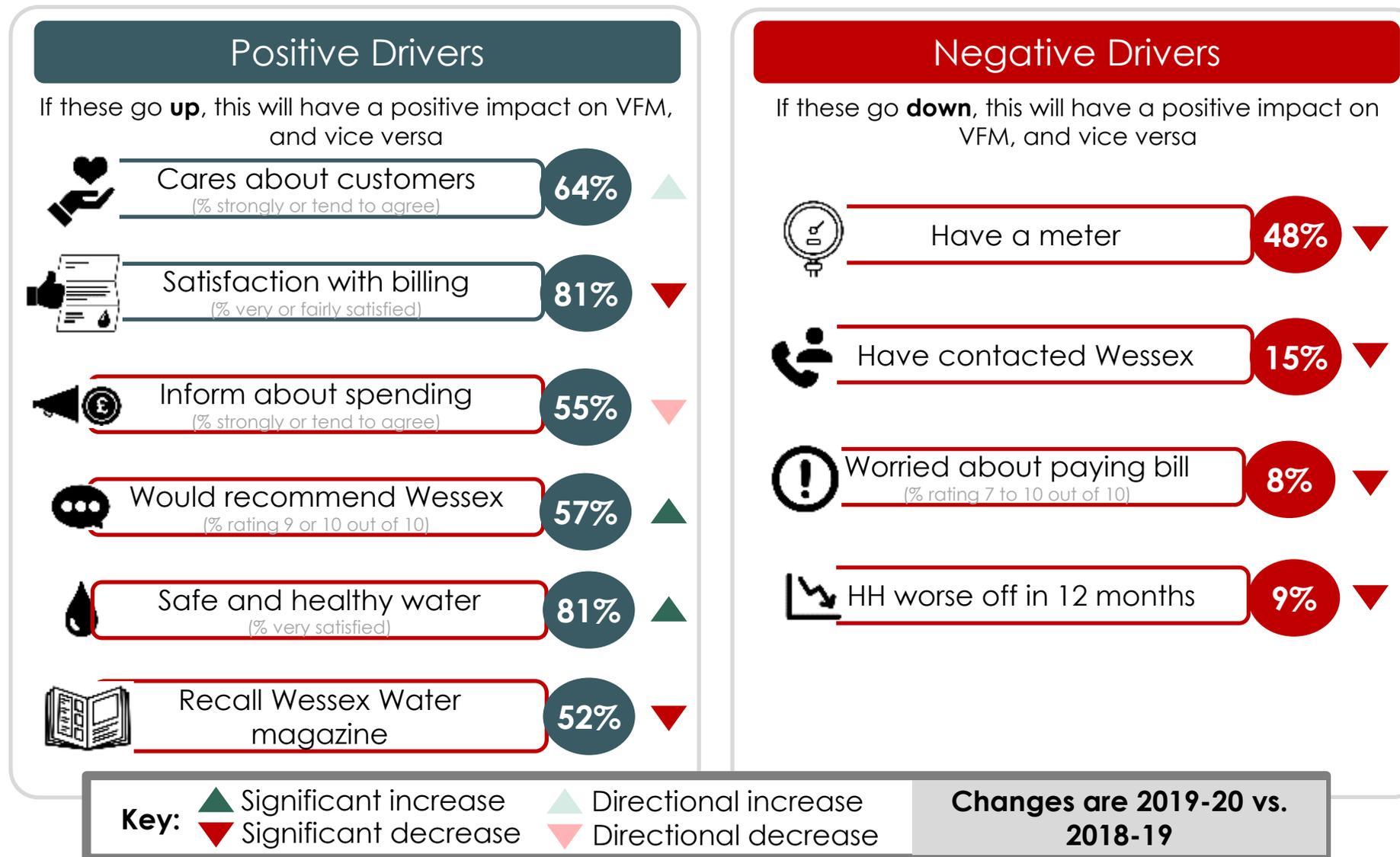
VFM has most scope to improve amongst younger customers, those who may be vulnerable, and notably the 'cost-conscious unengaged' segment. Innovation may help to target and engage with these specific customer groups.

**Q22 How would you rate drinking water supplies and the sewerage service you receive in your area in terms of value for money?
% 'Very good value' or 'Good value for money' (Base: All, 2019-20)**



Key Drivers of VFM (2019-20 vs 2018-19)

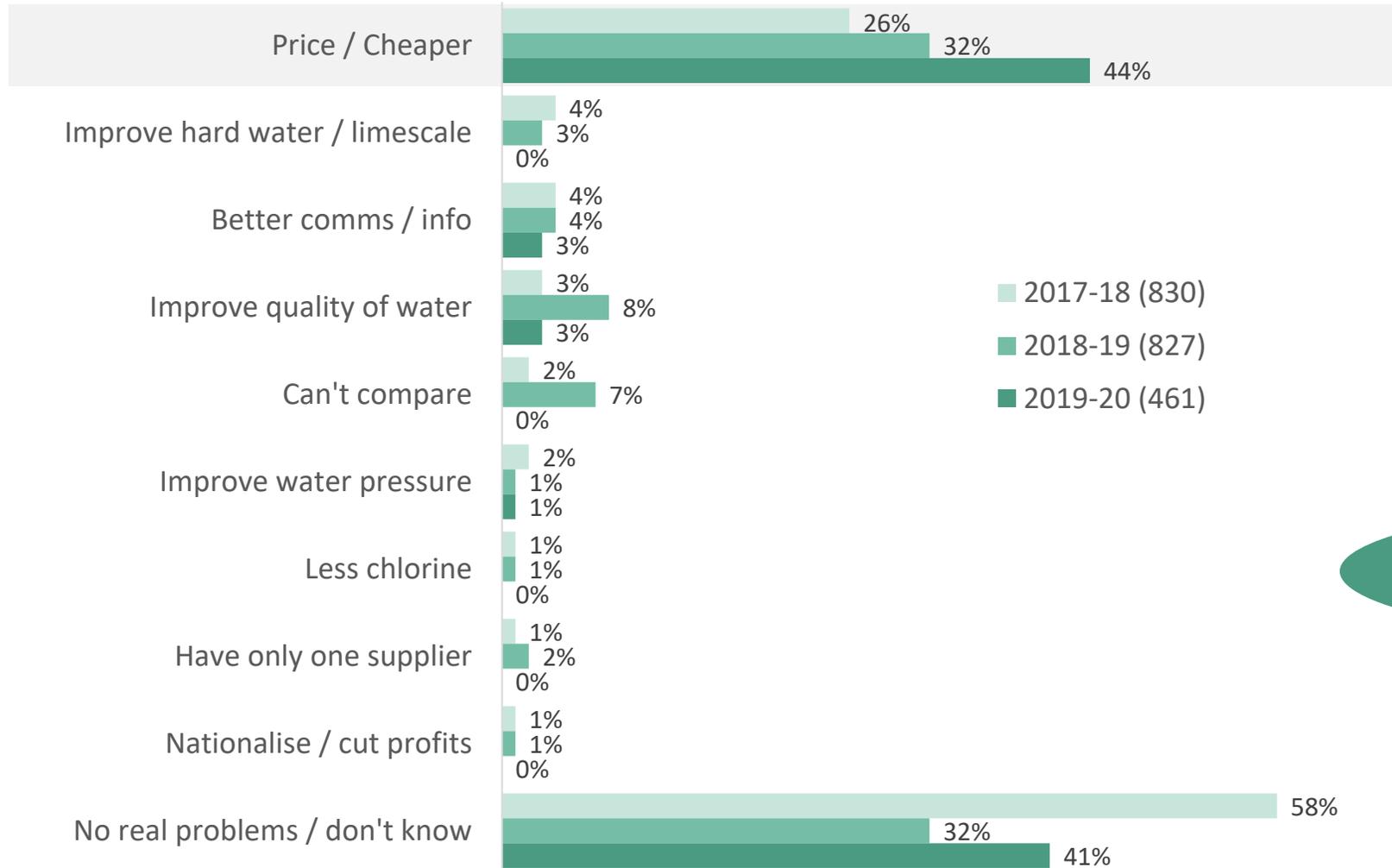
In 2019-20, even with slight declines in satisfaction with billing and in recall of the magazine, a number of other key drivers improve - promoting a higher VFM score than last year.



Improving VFM...

A clear focus on the price side of the value equation; in other respects most customers are satisfied with what they receive – relatively little scope to improve in terms of quality of delivery.

Q23. Can you say in your own words what would improve your view on value for money?
 (Base: All who do not say 'Very good value for money')



Could be cheaper

Too expensive compared to other water companies

We can always do with cheaper bills, we get good service, good water quality

In the past we had a strange taste to the water...it was as if there were too many chemicals

As I said we get a good service, water is very drinkable, pressure is good, no problems I can think of

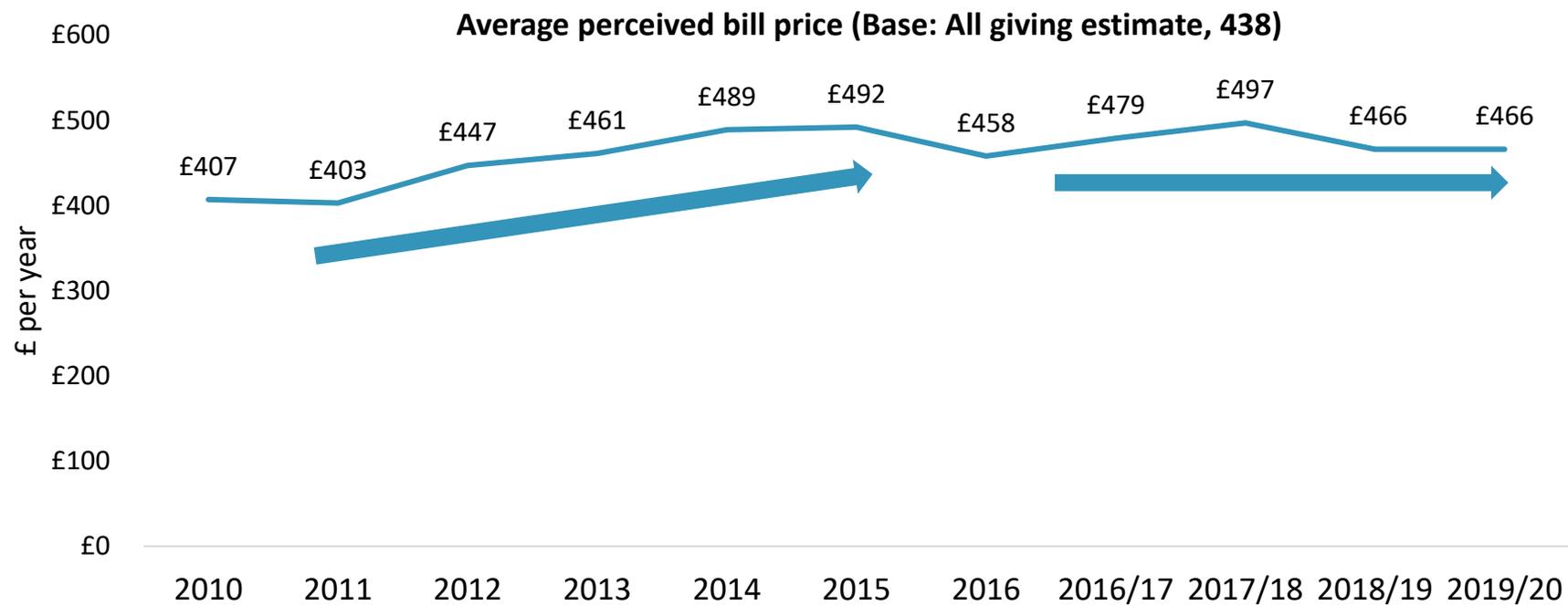
Perceived bill size

Under two thirds of customers can give an estimation of their bill size – fewer than last year. Plenty of scope to improve bill ‘salience’. Of those giving an estimate, the average perceived bill price is similar to last year – signs of stabilising.

Q20 Roughly how much do you think you currently pay, combining your water supply and sewage service?
 (Base: All 2019-20)

39% don't know
 vs. 32% last year

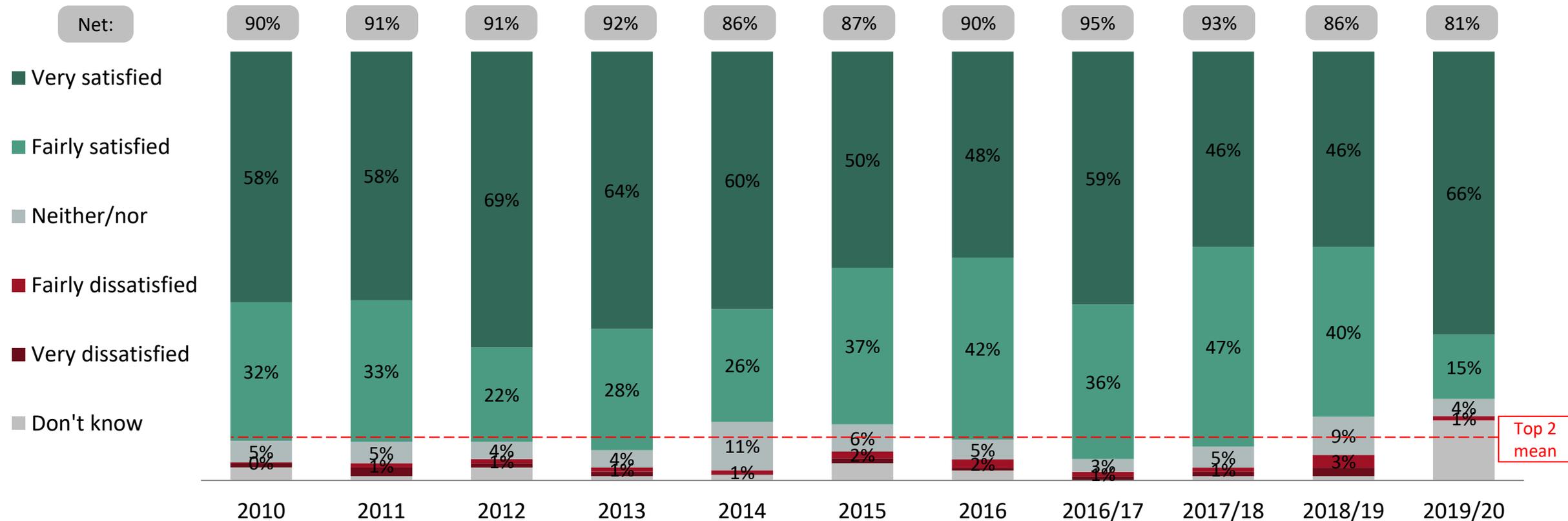
- In Bournemouth: 39%
- In Bristol: 47%
- In Wessex / Wessex: 36%



Satisfaction with billing

A key driver of VFM – satisfaction with billing has fallen slightly again this year after very high levels from 2016-18. The decline is because of ambivalence and uncertainty rather than active dissatisfaction – and coincides with fewer being able to give an estimate of their bill size.

Q14 (Q14a) Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months?
Base: All



NB: question wording altered in 2016
 2010-2015: Overall how satisfied are you with the way Wessex Water handles your billing?
 2016: Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months?

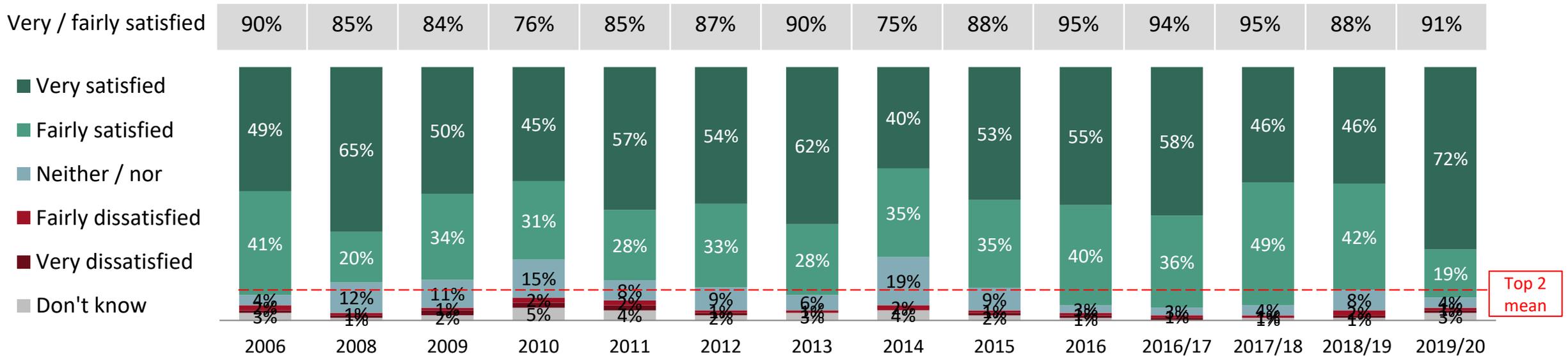


Satisfaction and Net Promoter

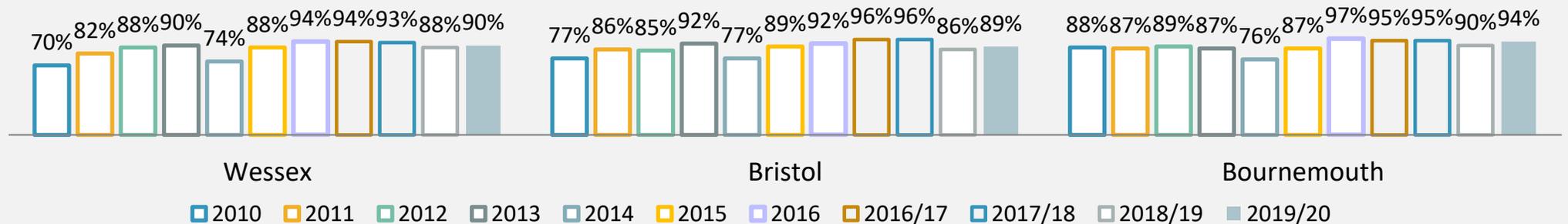
Overall satisfaction

Overall satisfaction has improved since last year, now back over 90%. It remains strong for all three regions. There's not much headroom for improvement, with a high proportion saying 'very satisfied', and only 2% actively dissatisfied.

Q15 (Q8) How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?
(Base: All)



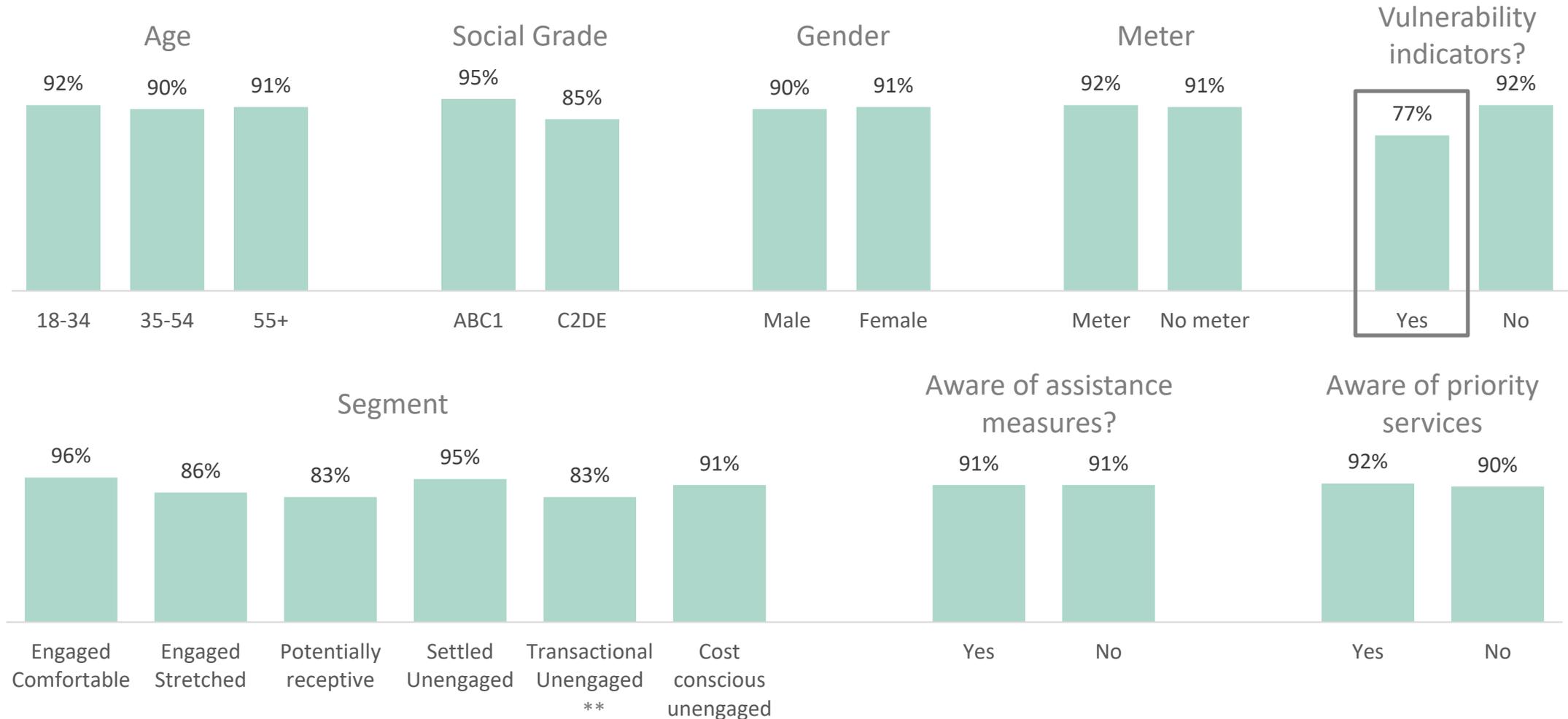
Very / fairly satisfied



Overall satisfaction by key groups

Satisfaction is broadly strong amongst all key groups, although those displaying indicators of vulnerability are less satisfied - indicatively the key issues amongst this group are price and issues with water leaks / wastage.

Q15 How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?
% Very satisfied or fairly satisfied (Base: All 2019-20)

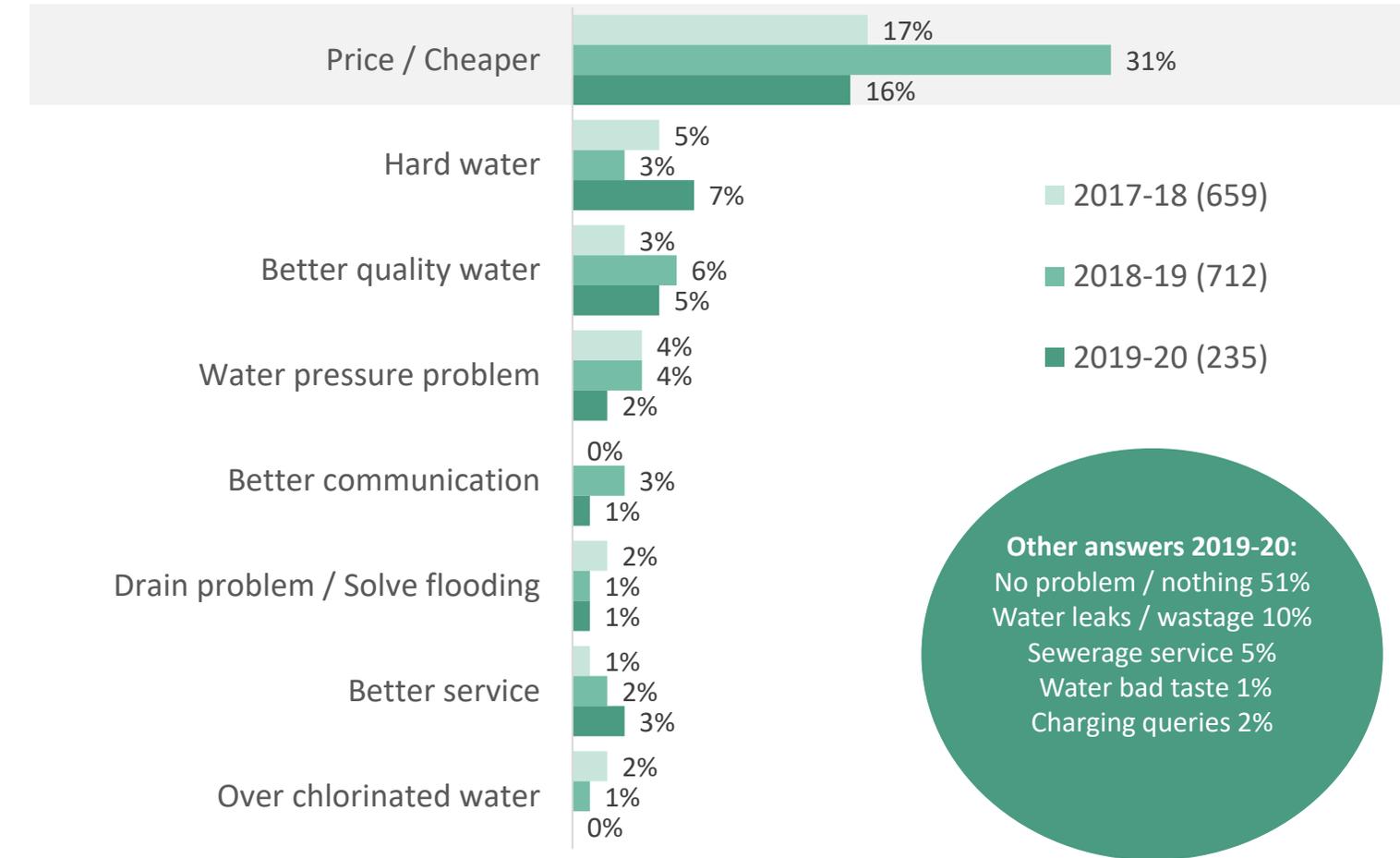


** CAUTION Low sample sizes (<80) – indicative only

Improving satisfaction

Even when focusing on satisfaction, the most top-of-mind issue to improve is bills; price is a more prevalent topic than any specific issue around water supply or quality.

Q16 Can you say in your own words what would increase your satisfaction in any of these areas?
Base: All not very satisfied with at least one element



Not had any dealings with them, don't really think about them they just provide an essential service

Not really, make our bills cheaper that's all

We get some funny smells coming up through our drains quite a lot, they seem to take ages to go away

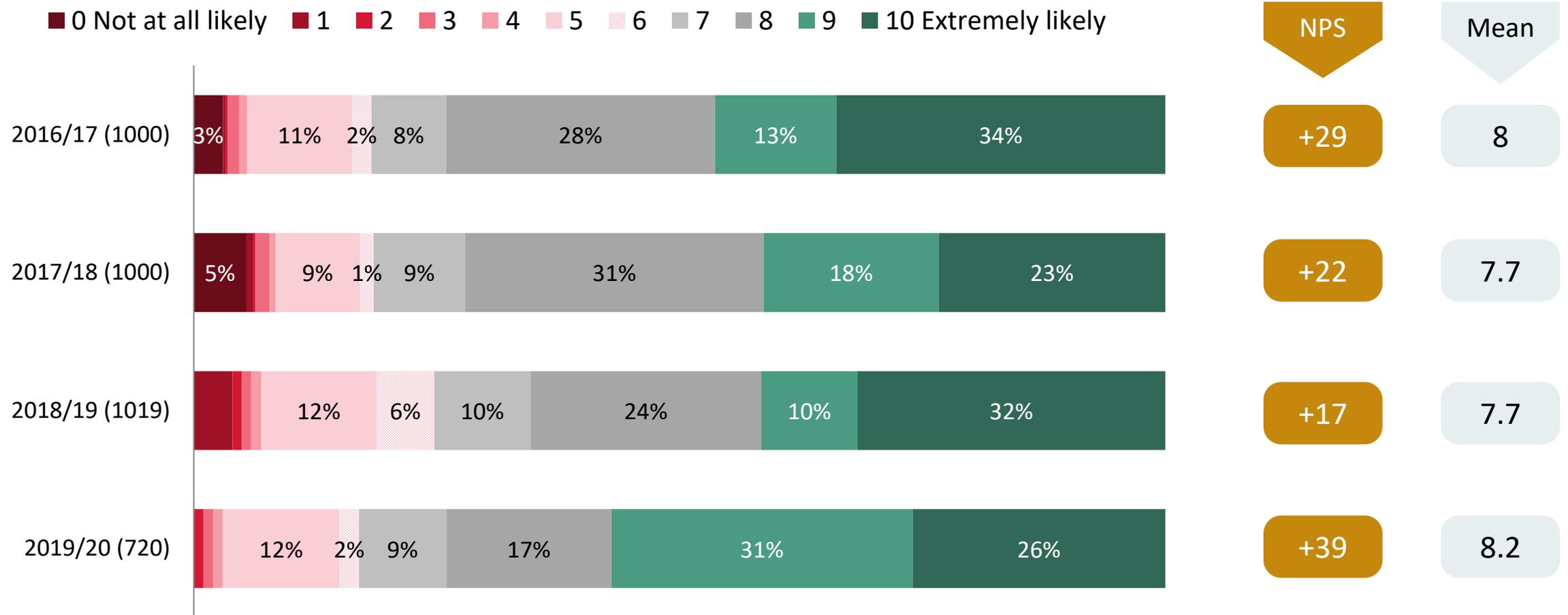
Proper service to deal with incorrect bills

Had very low water pressure since they did major works on the main road, have reported it several times but its still not fixed so rather unhappy with the situation

Net Promoter Score (NPS)

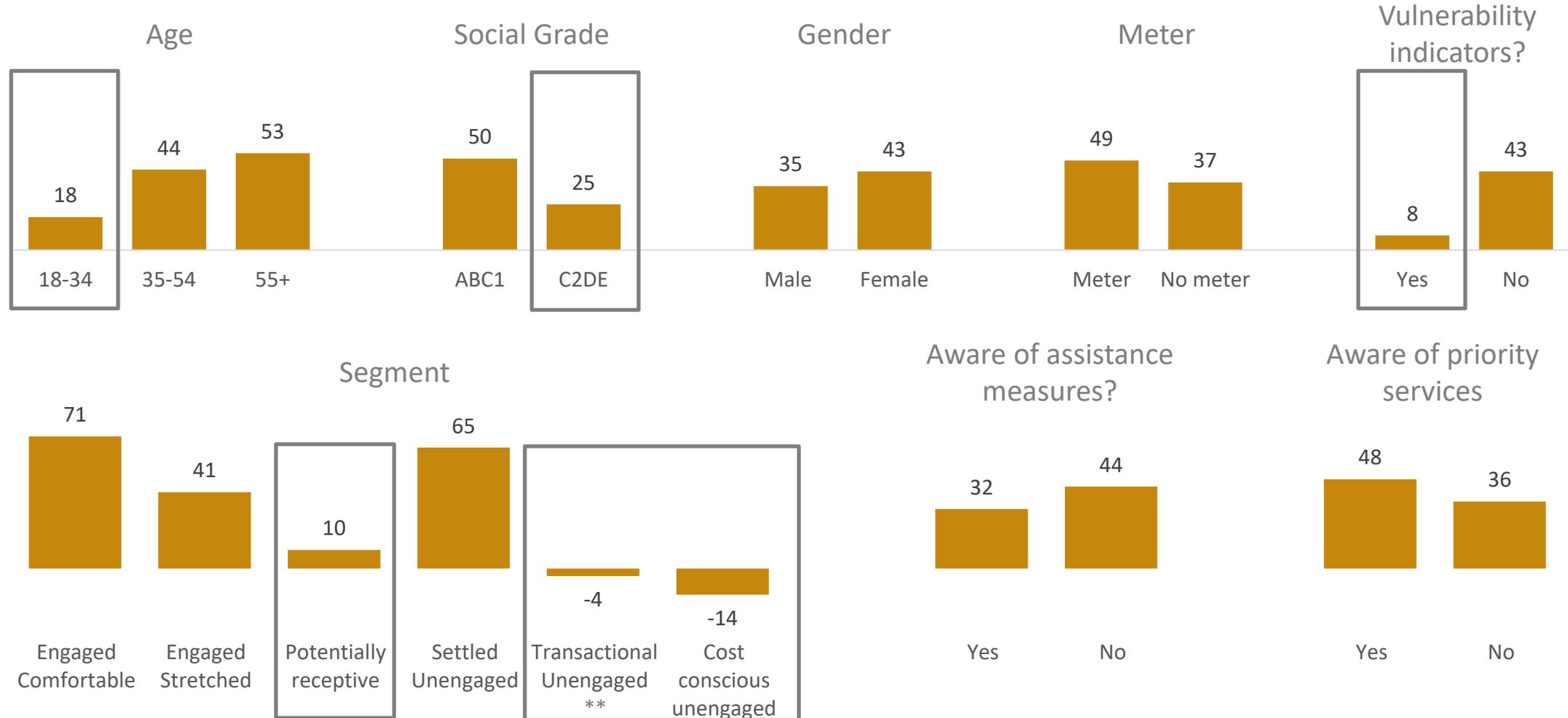
Across 2019-20, the NPS is strong – more positive than the last two years. Interpretation of this measure needs to take into account of its volatility, as it employs a +/- 100% scale.

Q33 If you were able to choose your water and sewerage provider, how likely would you be to recommend Wessex Water to a friend or colleague? (Base: All)



'Transactional unengaged' and 'Cost conscious unengaged' have negative NPS – they are priorities for targeting brand activity. Also scope to improve NPS amongst 'Potentially receptive', vulnerable, less affluent and younger customers.

Q33 Net Promoter Score
(Base: All 2019-20)



Reasons for recommendation score

Even 'promoters' often give a good score simply because they have had no problems – although we note a growing minority mention the environment. Amongst detractors, most simply don't have grounds for 'recommending'. A key task is to fill the 'image void' – giving consumers a relevant impression of the Wessex brand that would compel active positivity.

Q34 Why do you say that? *Top answers for each group* (Base: All)



Promoters (437)

Happy with service / satisfied – 34%

Good (quality) / clean water – 34%

Had no problems – 31%

Reliable / efficient – 19%

Good / very satisfied – 11%

Environment – 10%

Good value – 7%

Passives (176)

Happy with service / satisfied – 28%

Had no problems – 25%

Reliable / efficient – 20%

Good (quality) / clean water – 18%

Price issue / expensive – 10%

Good / very satisfied – 9%

Can't compare / only option – 8%

Detractors (107)



Can't compare / only option – 26%

Don't know (enough) – 25%

Price issue / expensive – 16%

Don't give recommendations – 14%

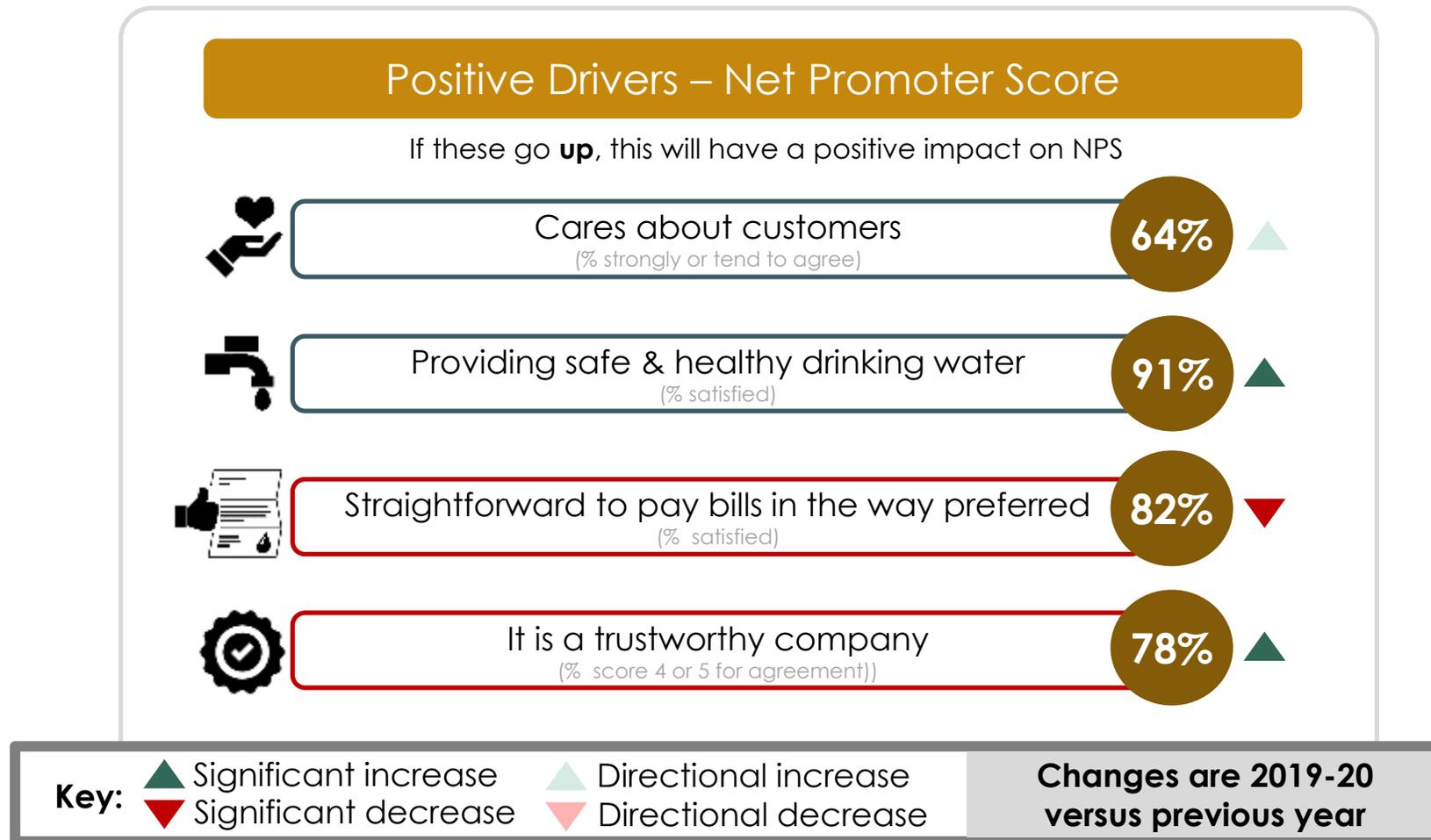
No real opinion – 13%

Slow to respond / inefficient – 11%

Had a problem – 7%

Underlying Key Drivers of Net Promoter Score

Beyond stated, 'top of mind' issues, we have identified some underlying drivers that have a degree of influence on the NPS (aside from VFM and satisfaction). If these drivers can be improved, we should see some positive response from the NPS. 'Cares about', 'safe and healthy' and 'trustworthy' all move in the right direction over the last year – although these alone are unlikely to account for all of the NPS improvement we have seen.

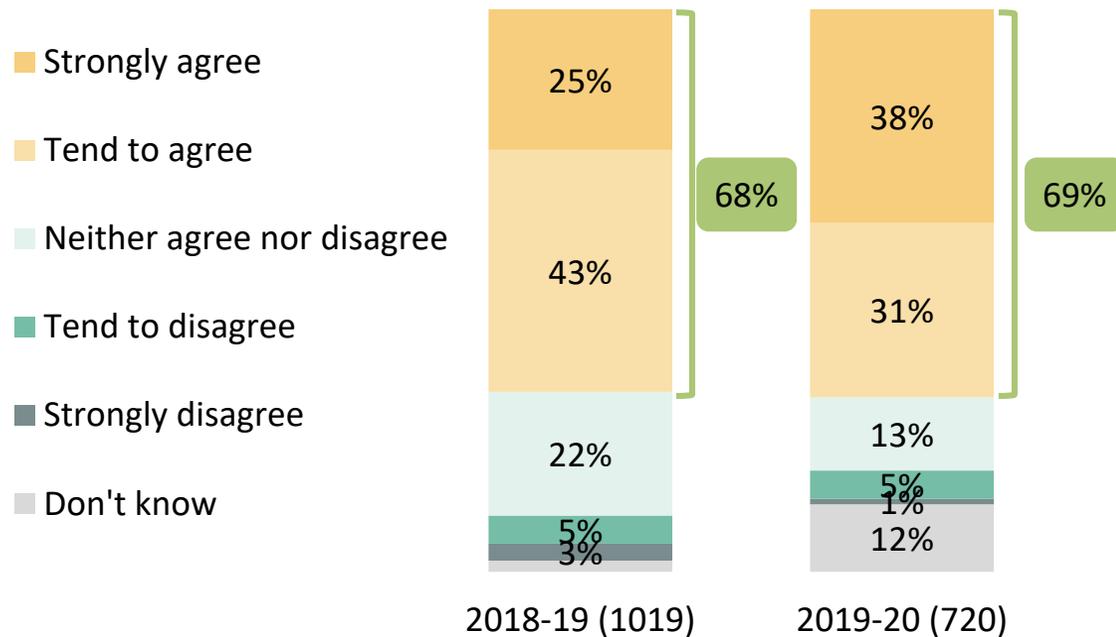




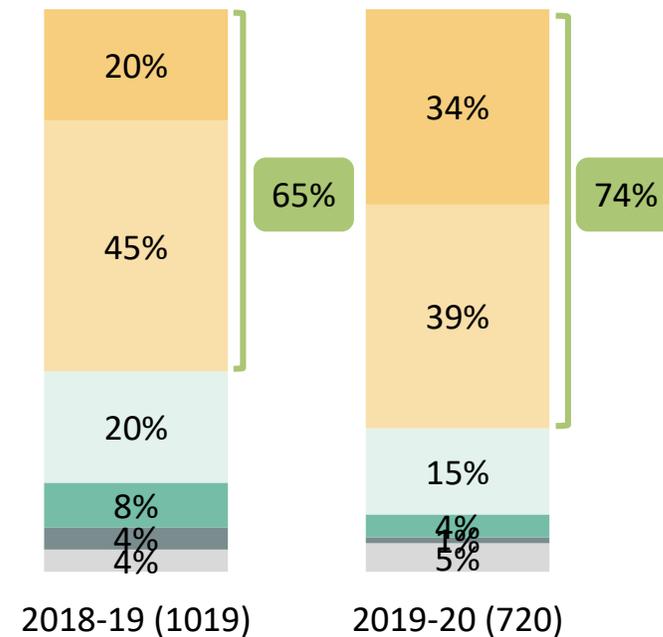
Affordability

Claimed affordability is very similar to last year: Just under 7 in 10 customers say total charges are affordable, 1 in 4 are ambivalent or don't know, and just 6% tell us they **do not** find their bill affordable. Nearly three quarters of customers find the total charges acceptable – up from 65% last year; could this be reflecting efforts to assist customers?

Q19b The total water and sewerage charges are AFFORDABLE



Q23b The total water and sewerage charges are ACCEPTABLE

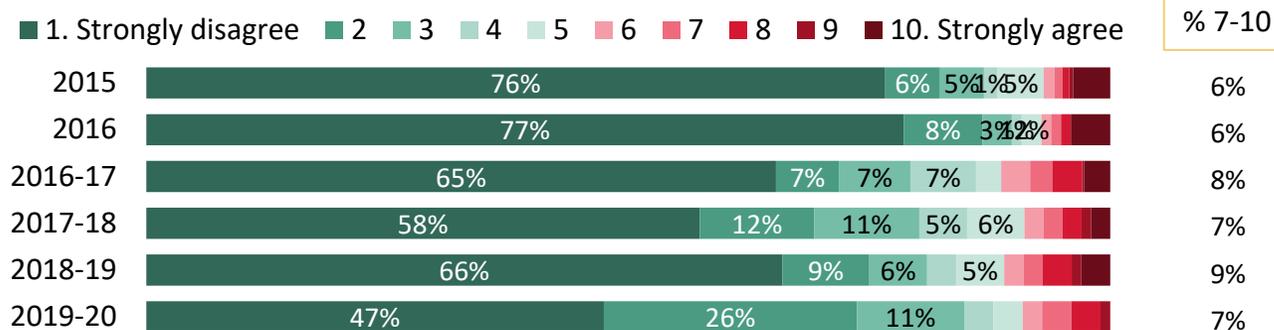


Most likely to disagree ('19-'20):
 Vulnerable 13%
 'Engaged stretched' 12%
 C2DE 10%

Affordability attitudes

There are signs of less anxiety about affording the water bill this year, alongside greater engagement with the water bill. This may be related to Wessex Water's plans to extend affordability measures.

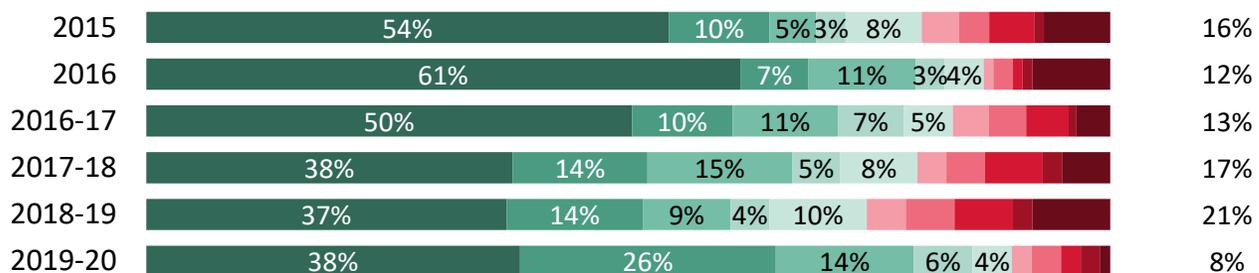
Q19(18b) How strongly do you agree or disagree? (Base: All who receive bill in HH)



Can't afford my water bill

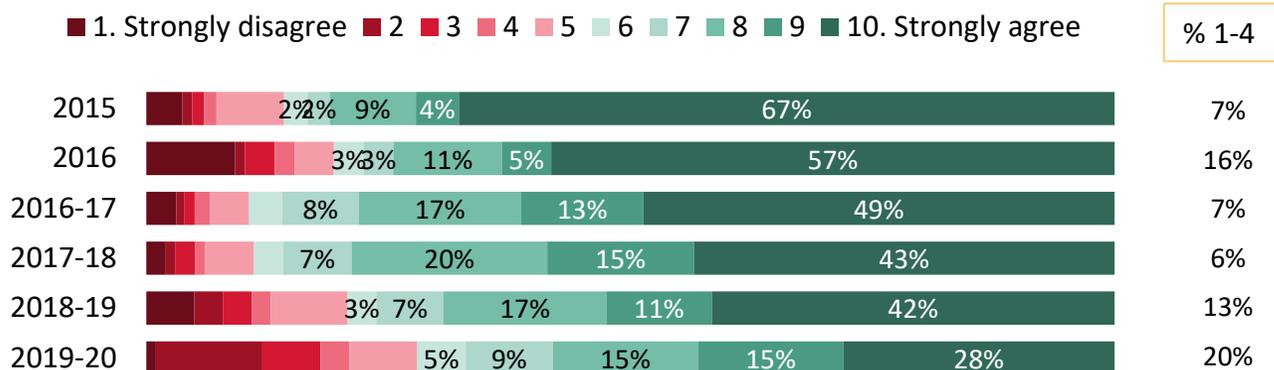
7%
Agree

I worry about affording my water bill



8%
Agree (significant decrease)

I don't really think about my water bill

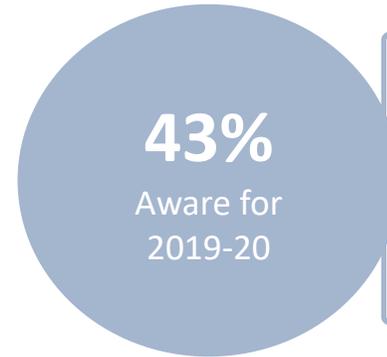
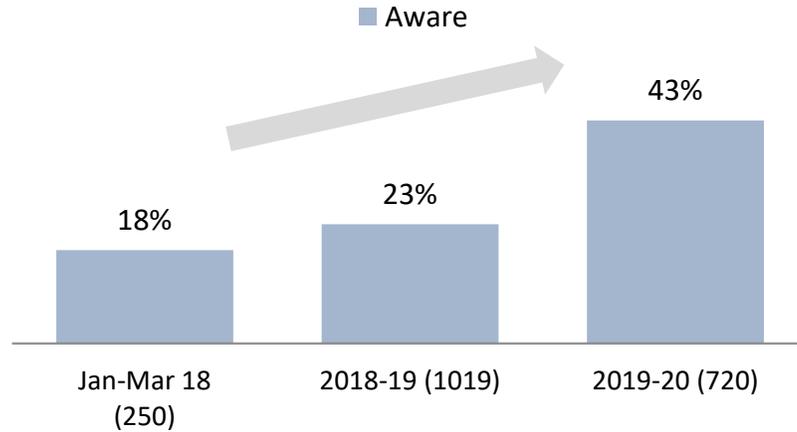


20%
Disagree (significant increase)

Awareness of Assistance Measures

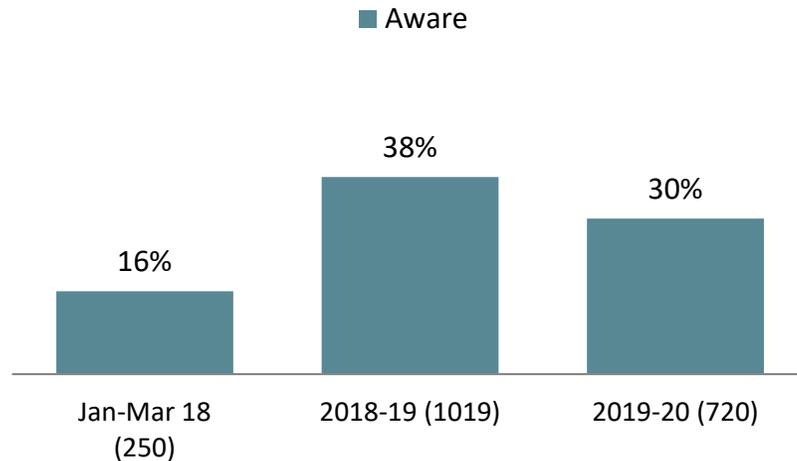
Awareness of **financial** assistance measures has improved notably from last year - coinciding with a reduction in bill anxiety. Messages about financial assistance seem to be reaching the right people – although still scope to reach more.

QF10 Are you aware of any kind of assistance that Wessex Water offers for customers **who struggle to afford their water bill?**
(Base: all respondents)



Higher amongst:
Vulnerable (63%)
 Engaged stretched (52%)
 Cost-sensitive unengaged (52%)
 Those aware of Wessex magazine (52%)

QF12 Are you aware of any additional services offered by Wessex Water? These are also known as **Priority Services?** *(Base: all respondents)*



Higher amongst:
Vulnerable (44%)
 Those with a meter (39%)
 Those aware of Wessex magazine (38%)
 55+ years old (38%)



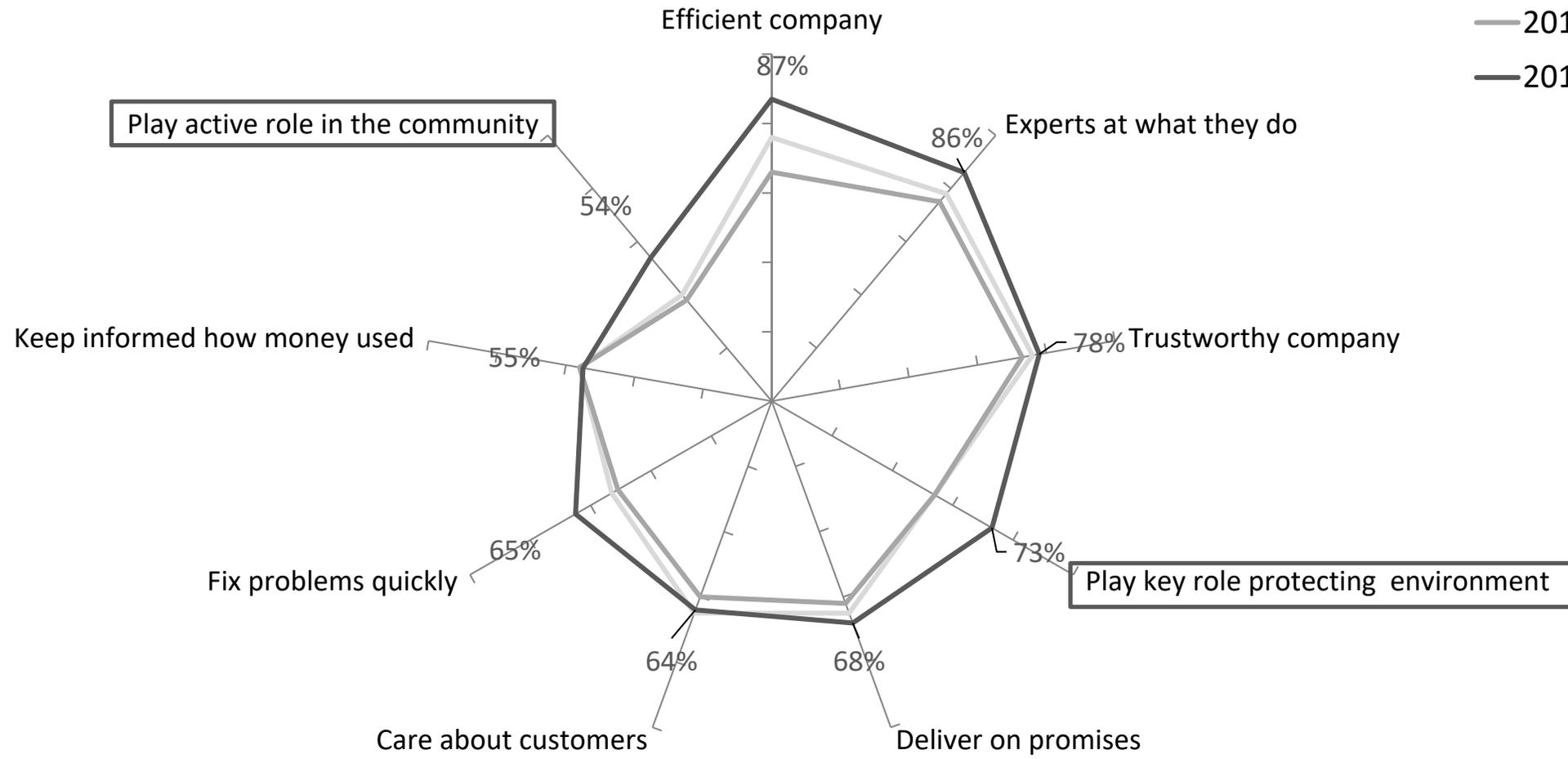
Image and Communication

Brand imagery

'Efficiency' and 'Expert' are consistently most widely associated with Wessex Water. In 2019-20 there's generally stronger endorsement of Wessex Water's image - in particular what Wessex Water does for the environment and communities. These improvements may be a response to recent initiatives and communications.

Q17. How much would you agree with the following statements?
% Agree strongly or tend to agree (Base: All)

— 2017/18 (1000)
— 2018/19 (1019)
— 2019/20 (720)





Water efficiency / community



Water efficiency



Cold weather



A

M

J

J

A

S

O

N

D

J

F

M



Plastic / wet wipes – what not to flush



Cold weather, pollution, wet wipes

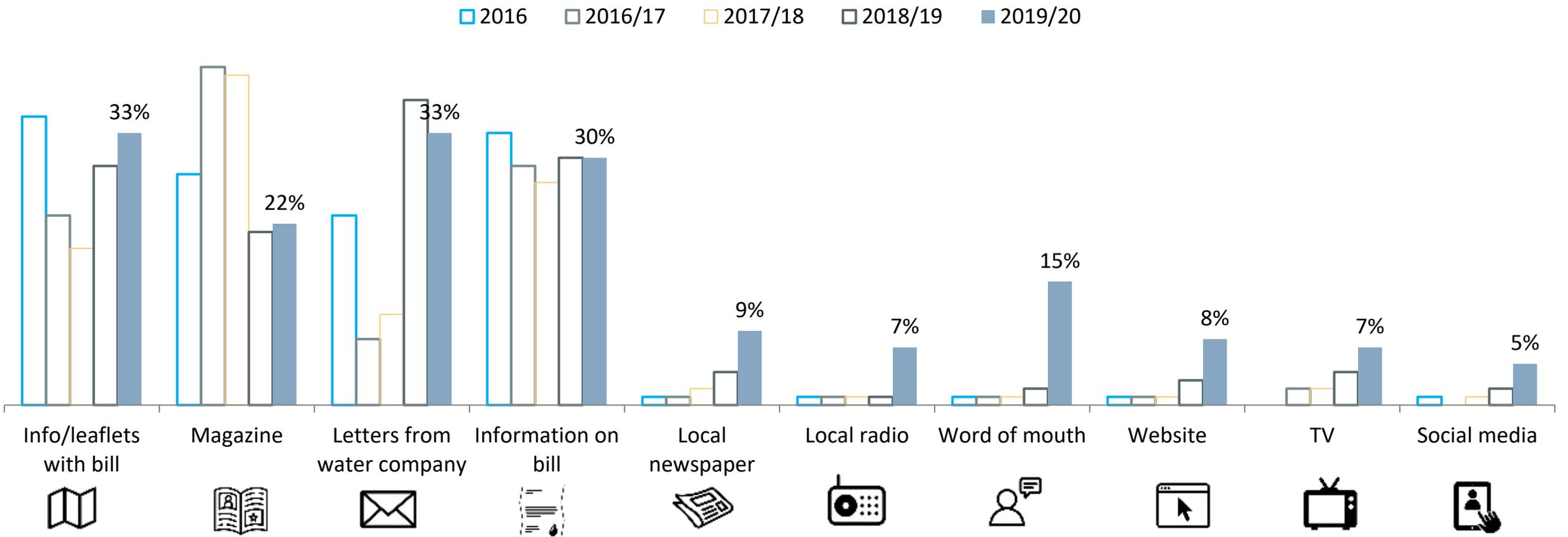


Ongoing social media

Recall of recent communications - channel

- **Spontaneous** recall of receiving letters has risen this year, while the magazine is less top of mind
- While still relatively low recall, there is more mention of Wessex communication via local papers, radio, the website, TV and social media in the last year – and particularly word of mouth.

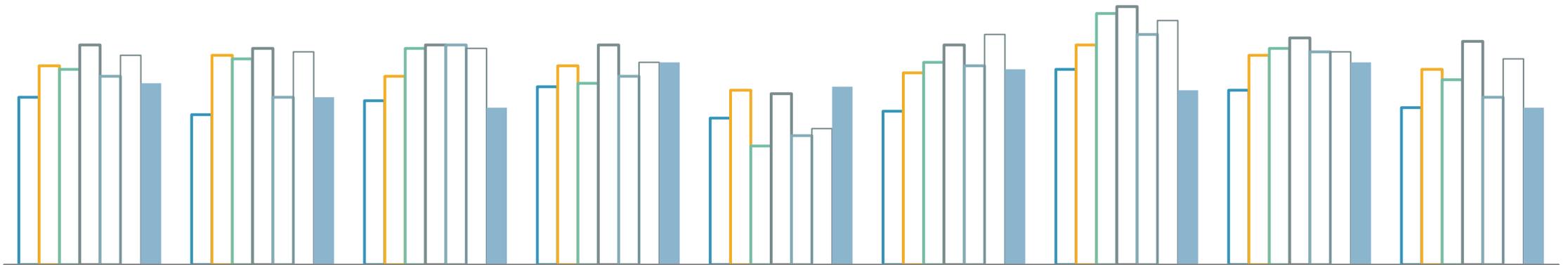
Q24(19) Please can you tell me all the different ways that you have received information from your water company or heard about your water company in the last year? (Base: All)



Prompted magazine recall

On **prompting**, magazine recall this year cannot quite match last year, but remains more than half of customers. It has good reach amongst most groups of customers; more evenly recalled amongst different age groups this year, but lower amongst C2DE customers. Relevance of headline content is likely to be an important influence on recall.

Q27. Wessex Water publishes a magazine. Do you recall receiving this in the last year? (Base: All)



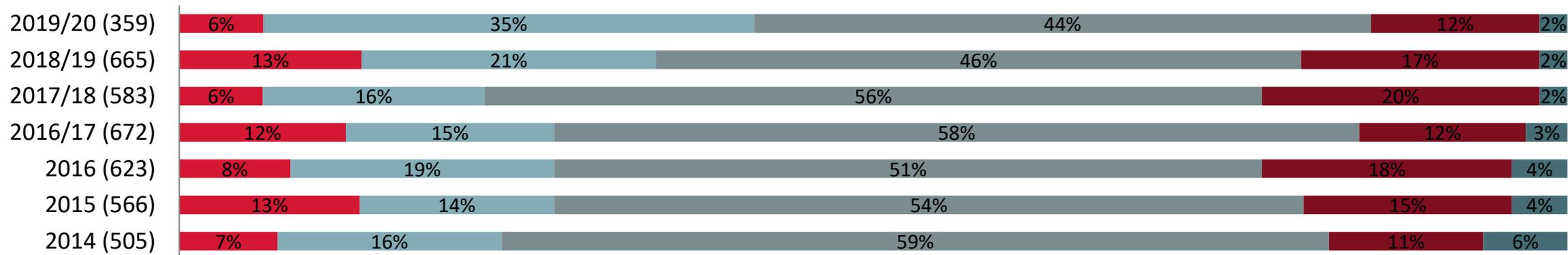
	Total	B/mouth	Bristol	Wessex	16-34yrs	35-54 yrs	55+ yrs	ABC1	C2DE
2014	48%	43%	47%	51%	42%	44%	56%	50%	45%
2015	57%	60%	54%	57%	50%	55%	63%	60%	56%
2016	56%	59%	62%	52%	34%	58%	72%	62%	53%
2016/17	63%	62%	63%	63%	49%	63%	74%	65%	64%
2017/18	54%	48%	63%	54%	37%	57%	66%	61%	48%
2018/19	60%	61%	62%	58%	39%	66%	70%	61%	59%
2019/20	52%	48%	45%	58%	51%	56%	50%	58%	45%

Quality of magazine readership picks up again this year, with over four in ten of those who recall the magazine telling us they read 'all or most'. The magazine remains an opportunity to get important communications noticed. Content is also rated useful by two thirds of those aware in the latest year – one of the highest scores to date.

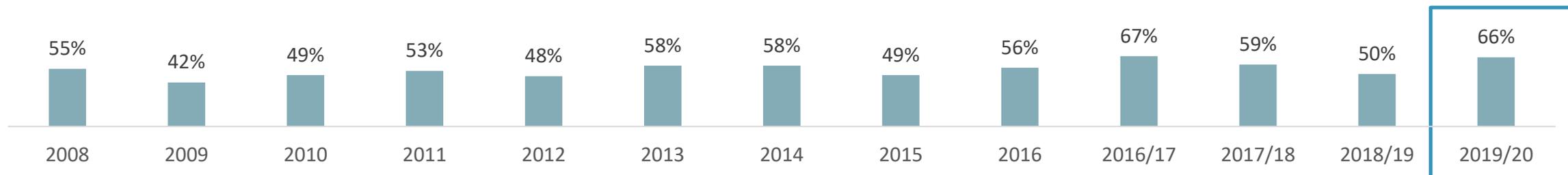


Q28 (26) How much did you read of Wessex Water magazine? (Base: those who recalled receiving WW magazine)

■ All of it
 ■ Most of it
 ■ Just flicked through it
 ■ Did not read any of it
 ■ Don't know



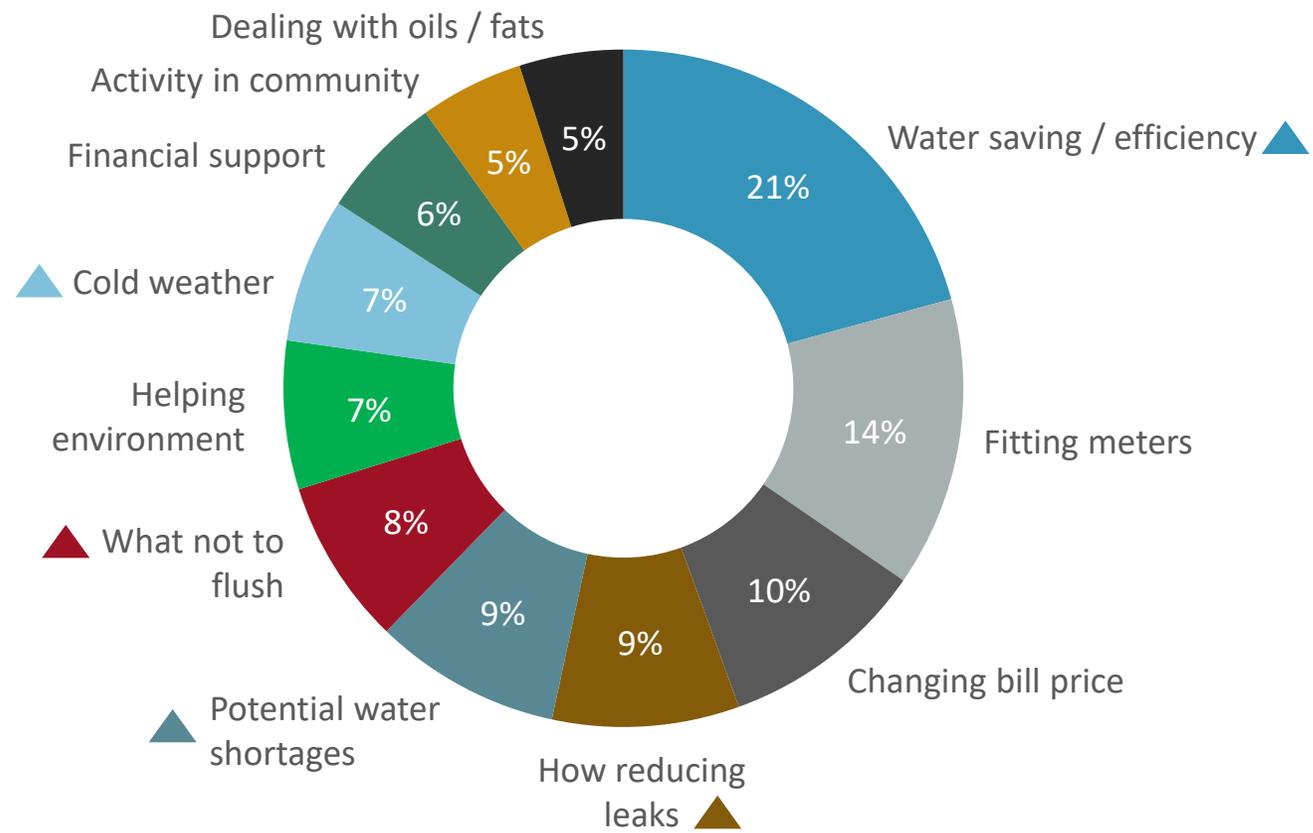
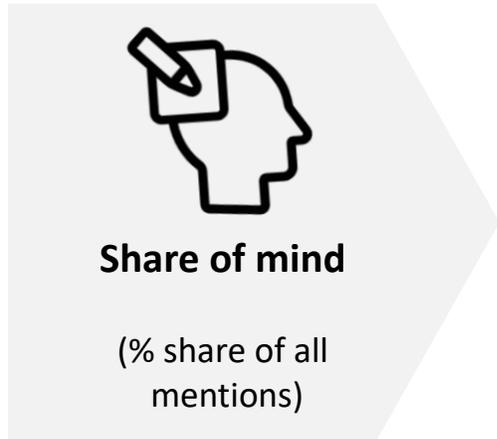
Q29 (27) Overall how useful did you find Wessex Water magazine? % very or quite useful (Base: recalled receiving WW magazine, 359)



Recall of messages / information about Wessex Water

The combination of magazine and radio activity with a focus on **water saving and efficiency** appears to have cut through more than other messages. 'What not to flush' also grows in share of mind (coinciding with the 'War On Plastic' BBC TV series featuring Wessex Water), as does cold weather messages (carried both on the radio and in the magazine).

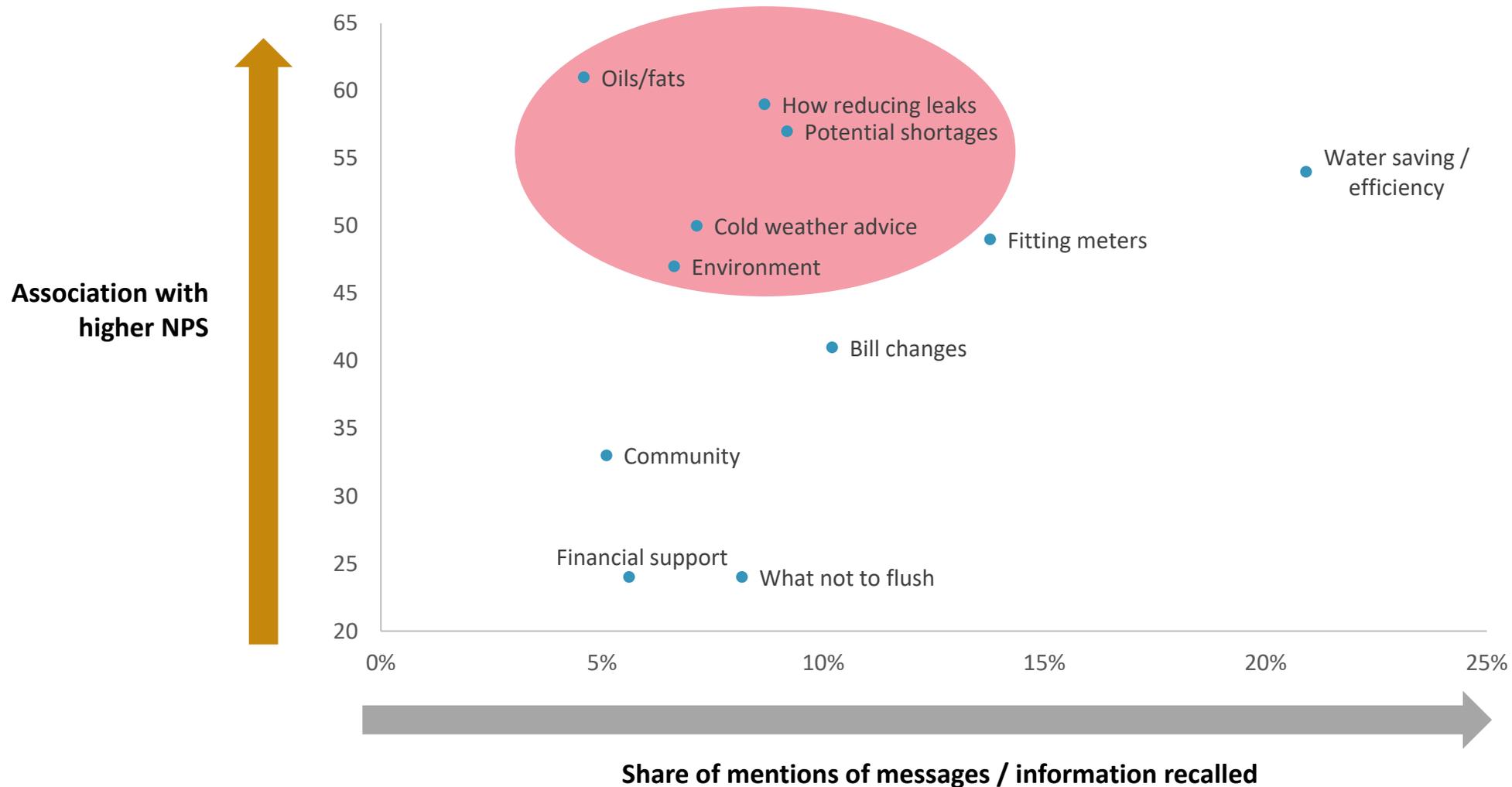
Q25. And what did you hear about Wessex Water or what was the subject of that information? Base: All 2019-20 who mention anything



Key: ▲ Increase since last year

Messages / information – association with NPS

Awareness of certain messages / information correlates with higher NPS. Focusing on widely relevant, practical and positive advice (oil and fat; cold weather advice; potential shortages) plus broader messages on reducing leaks and environmental action may potential to boost NPS.

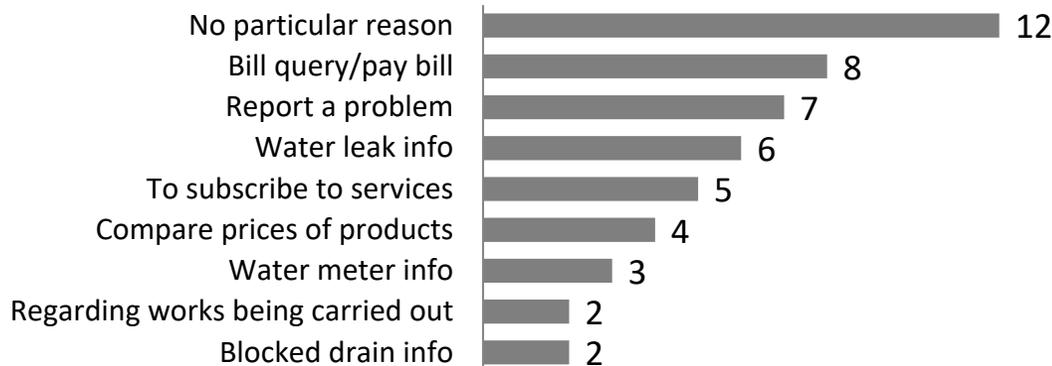




6% have visited the website*
(9% in 2018/19)

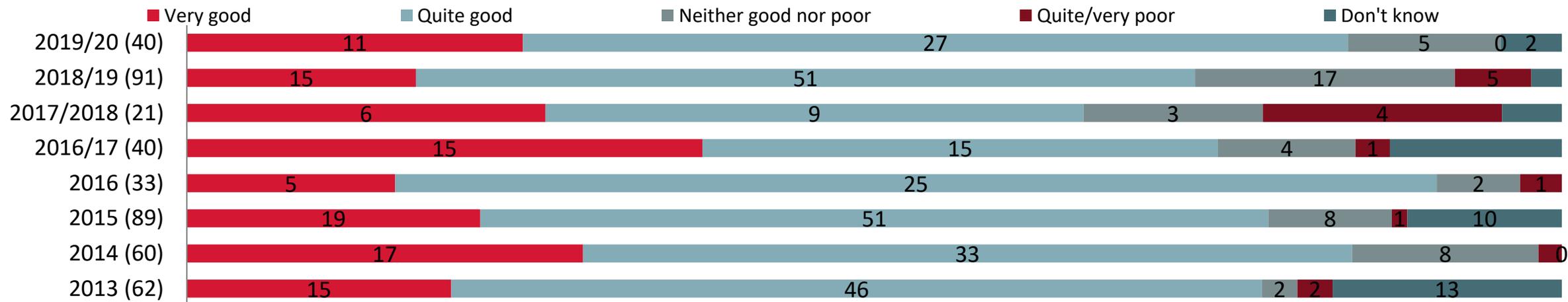


Q31 Why did you visit the Wessex Water website? (Base: all who visited website, 40). Actual numbers



Only around 1 in 20 customers recall using the website recently. Of those using it, there is a mix of motivations. Website experience is broadly good – although there is opportunity to ‘delight’

Q31 Overall how would you rate Wessex Water’s website? (Base: all who visited website, 40). Actual numbers



*NB: question wording altered in 2018/19 Previously: Wessex Water has recently updated its website, have you visited Wessex Water's website in the last 6 months?
2018/19: Q30. Have you visited Wessex Water’s website in the last 6 months?

Ease of access - Wessex

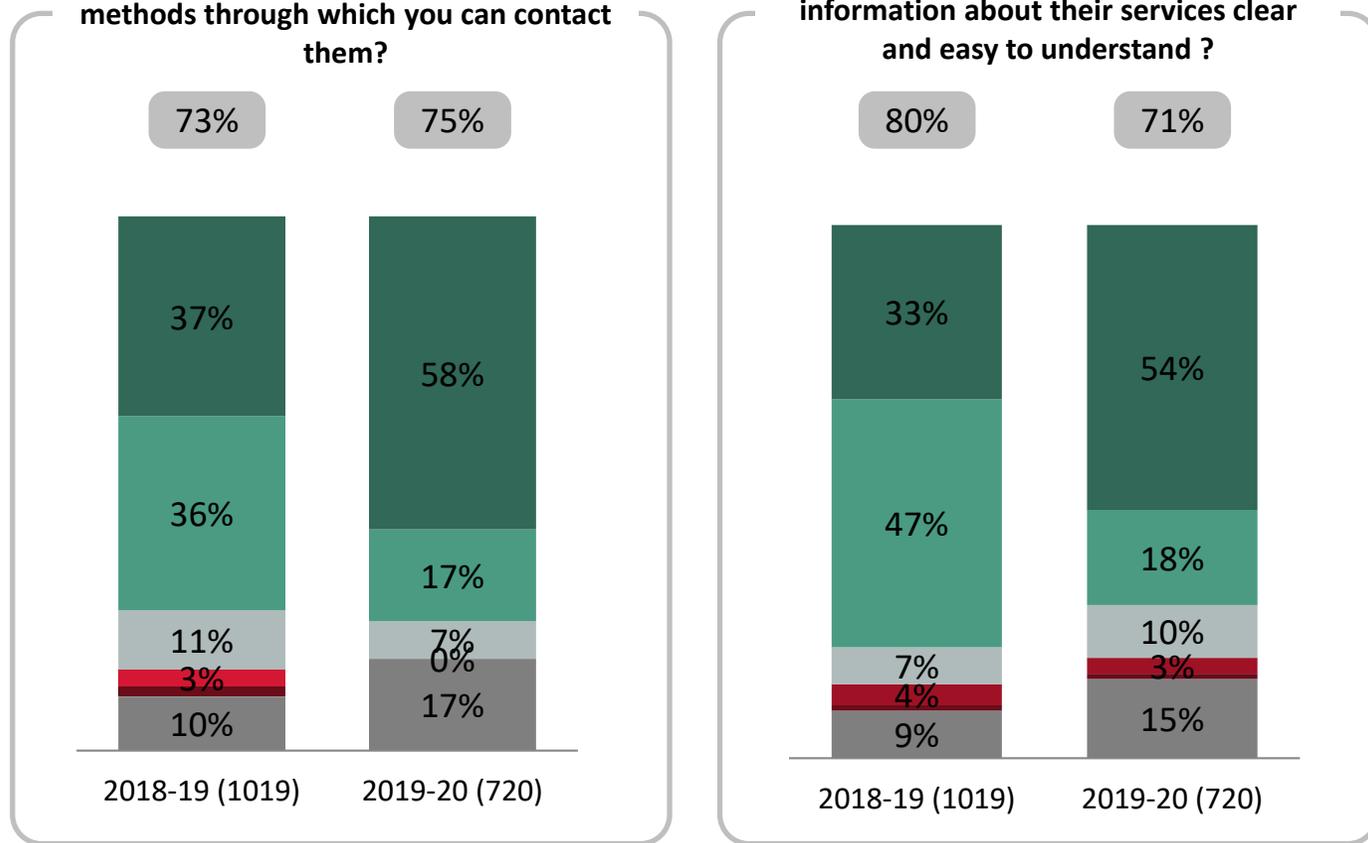
Most customers are broadly happy with accessibility, although nearly 2 in 10 now say they 'don't know' about the methods of contacting Wessex. Many will have had limited need to do so, but with few using the website, is there scope to promote and embed digital options more?

Q17C_4. How would you rate Wessex Water's performance in - The range of methods through which you can contact them?

Q17C_5. How would you rate Wessex Water's performance on - They make information about their services clear and easy to understand ?

Very / fairly satisfied:

- Very satisfied
- Fairly satisfied
- Neither nor
- Fairly dissatisfied
- Very dissatisfied
- Don't know



Ease of access combined metric:

73%

(The sum of agreement with both statements divided by 2)

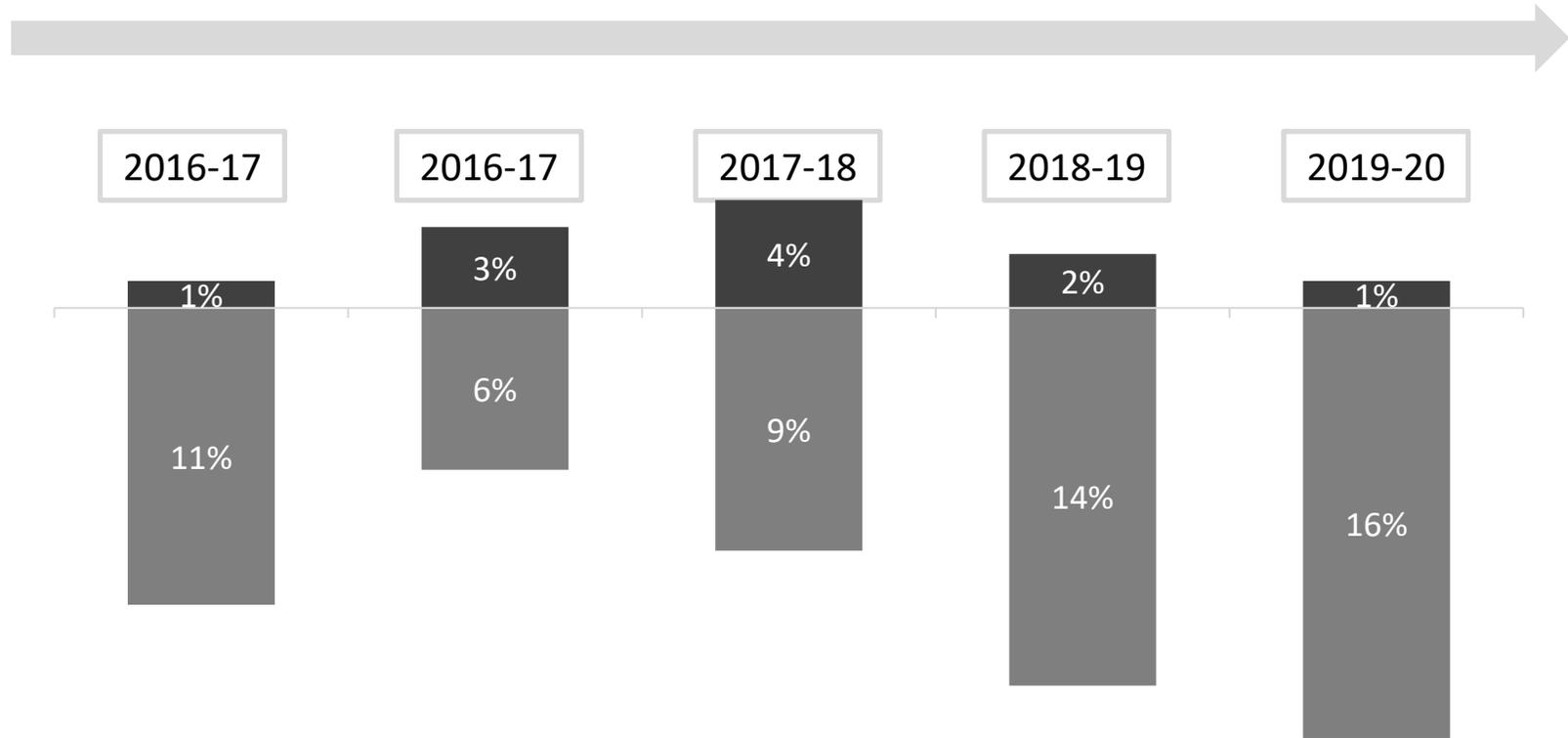
Directionally down from last year (76%)

Base: All respondents

Meeting information needs?

The balance of opinion remains that Wessex provides 'too little' info – customers would accept more communication.

Q26 (24) Overall do you think Wessex Water provide their customers with too little, too much or about the right amount of information? (Base: All)



■ Too much

■ Too little

In particular those who think 'too little':
Engaged Stretched & Potentially Receptive segments; those 'less than satisfied'



Moving forward

Key findings

Implications

Value for money & Bills

- Some VFM improvement in 2019-20
- ...scope to improve further (but post COVID19 parameters may shift dramatically)
- Low prices remain the key top-of-mind factor
- Fewer customers able to estimate their bill size, but those who can are now slightly better informed

- A need to fill the bill knowledge 'hole' – about the current amount and future trajectory of bills
- In addition, informing customers 'where money goes' and bolstering 'care' perceptions can assist VFM further
- Focus on younger customers and 'Cost-conscious unengaged' with new modes of engagement
- Bill discount / relief (in particular for vulnerable) may be increasingly pertinent as COVID19 impacts finances

Satisfaction

- Overall satisfaction has directionally improved - strong for all three regions
- Little headroom for improvement
- Bill price is a top of mind factor to improve satisfaction, but other factors also contribute

- As the nation approaches challenging times, (in May half of the public are feeling 'more stressed') there's a heightened need to ensure the basics are done well
- During lockdown, reliable and responsive service provision will be crucial – and in particular for an expanded set of 'vulnerable' customers
- Some evidence that, so far, water companies have not succeeded in actively making a positive impact since the coronavirus outbreak – need to investigate and address
- Communication and updates will be important during times of heightened anxiety (...and we know customers feel Wessex Water can be too 'quiet').

Key findings



Implications



Net Promoter Score

- Stronger NPS recorded this year
 - Although it varies substantially by different customer groups - 'Transactional unengaged' and 'Cost conscious unengaged' segments see a negative score
 - The positive shift in NPS coincides with notable gains in two aspects of brand image: Environment and community participation
 - Signs that environmentally-related action is growing as a top of mind reason for advocating Wessex Water
 - ...and awareness of environmental comms, as well as comms about relevant, practical & positive advice, can correlate with higher NPS
- Consumers need front-of-mind associations about Wessex Water to feel that they would 'recommend' it
 - The sentiment of 'recommendation' hinges on what differentiates the brand
 - Communication and association with **relevant** topical practical and emotive themes / action can capture popular imagination and help an evolving Wessex brand evoke positive sentiment
 - Specific audiences to target are the less engaged segments, along with younger, vulnerable and less affluent

Key findings

Implications

Affordability

- Signs of slightly less anxiety about affording bills (ahead of the coronavirus outbreak...)
- Meanwhile slightly higher claimed involvement with the water bill
- ...coinciding with Wessex Water's plans to extend affordability measures and increase in awareness of assistance

- Apparent success in communicating roll out of financial assistance measures – particularly to key groups (vulnerable, engaged stretched, and even cost-sensitive unengaged)
- ...awareness is not yet universal so there's a need to continue – and the audience for whom this is relevant may well expand over coming months

Image and comms

- Improving associations with 'active in community' and 'protecting environment'
- ...whilst maintaining 'efficient' and 'expert' as core foundations of brand
- More mention of a wider range of comms recalled this year (including word of mouth)
- The magazine falls slightly for prompted recall, but is enduring in quality of readership and perceived as highly useful

- There is licence to communicate more
- Indirect signs that the latest media strategy is beginning to be recalled in different contexts
- Important to consider how to deploy individual channels to inform and support customers on practical matters, while also maximising the combined effect of disparate channels to support a single-minded brand identity for the wider *consumer* audience



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Appendix 1 – Additional Context

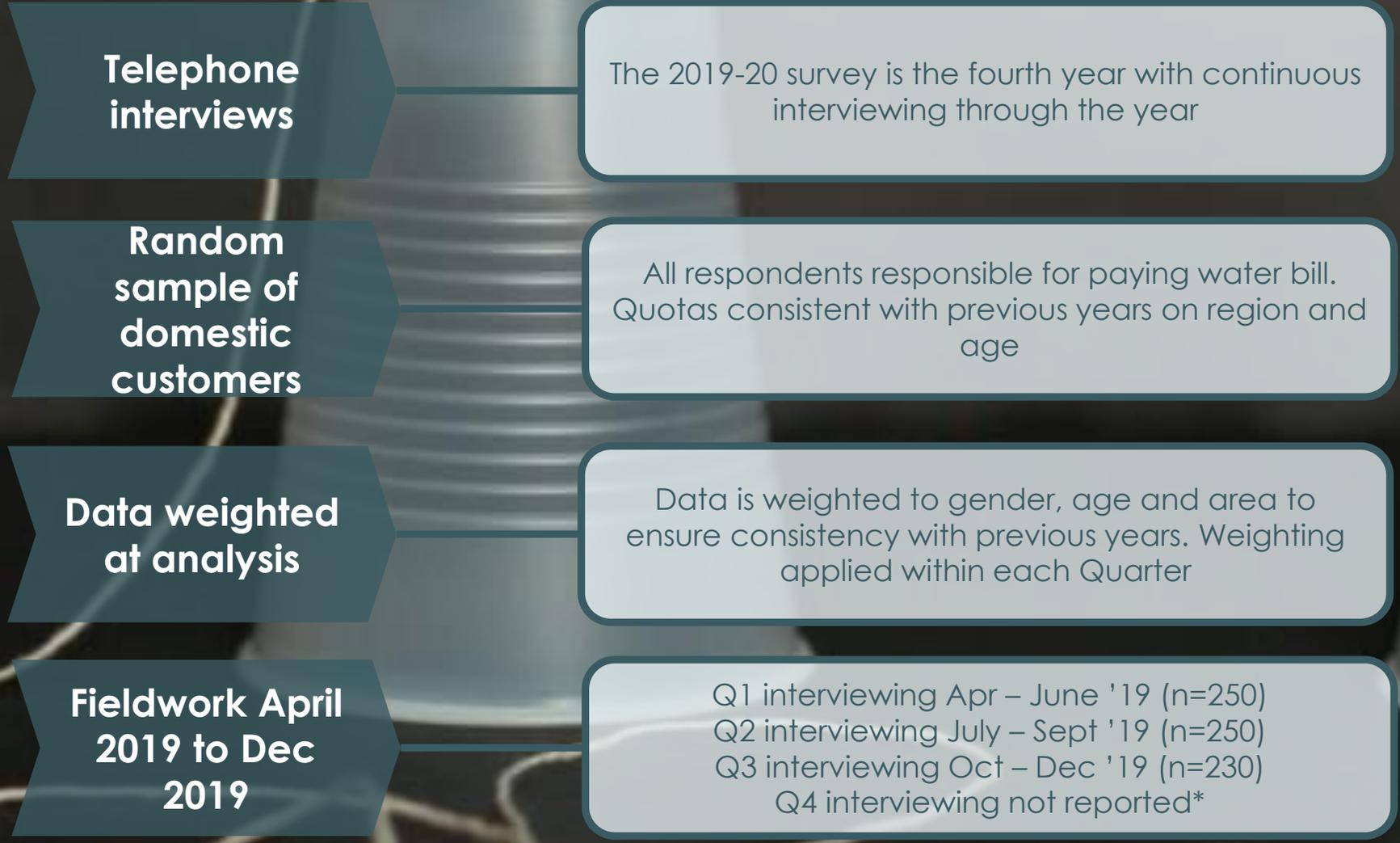


Measure domestic customer views in relation to service, value for money, affordability and satisfaction

Identify and monitor imagery of Wessex Water and attitudes towards it

Track awareness and use of Wessex Water communications

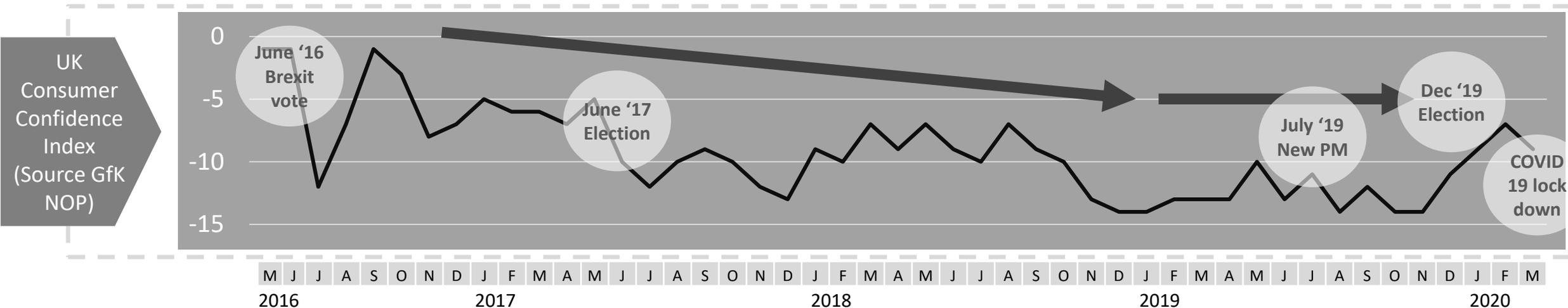
Understand how Wessex Water can improve perceptions amongst customers



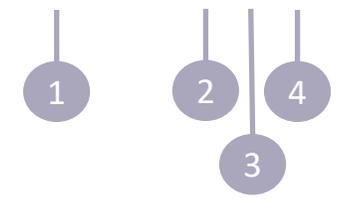
* Q4 data was not properly recorded due to fieldwork supplier system failure and cannot be reported

Context

Consumer confidence nationwide has been at relatively low levels through 2019. Signs of some improvement going into 2020 likely to be short-lived with the outbreak of COVID19.



- Key Wessex activity / industry news
- 1 Wessex Water water efficiency radio advertising
 - 2 First burst of Wessex Water cold weather radio advertising
 - 3 Ofwat **Final determinations**
 - 4 Second burst of Wessex Water cold weather radio advertising



Weather watch

- A relatively dry start to the year
- Summer was both hot and wet – record breaking temperatures in August
- November to February 2020 saw unusually wet weather – the country was hit by storms Brendan, Ciara and Dennis in quick succession in January-February 2020, with serious flooding in several parts of England and Wales

Wessex Water helping Bath Half go plastic free

27/01/2020

Wessex Water will supply fresh tap water to Bath Half Marathon runners - part of a mission to make the race totally free of single-use plastics by 2021.



MOST READ

- Reaching net carbon zero
- Three firms win favour in Wessex Water supply chain challenge
- Amey bags £100 million Yorkshire Water contract
- Filter manufacturer invests for growth

In a landmark new partnership called Refill Not Landfill, runners will be able to fill up their reusable bottles at Wessex Water's HydroZones, with tap water stations also available to supply water in compostable cups during the race.

Why Wessex Water bills are coming down

The company is investing a record £1.4 billion to further improve services for customers and protect the environment

Wessex Water pays for polluting Dorset nature reserve

Wessex Water has paid £35,000 towards environmental improvements at Stoborough Heath nature reserve in Dorset after a sewer main burst.

Wessex Water customers being invited to find out more about future plans

Wessex Water is inviting all of its customers in Bath along to a free event at Bath Racecourse in July to get an insight into the company's plans for the future.

Clean-up at Chesil Beach by Wessex Water volunteers



The Times view on pollution in Britain's rivers: Filthy Business

The Environment Agency needs to get tougher with water companies whose woeful record means no English river can be certified safe for swimming

Charity accuses water companies of treating rivers as open sewers

Viva Buisly, Science Correspondent
August 13 2019, 12:01pm, The Times

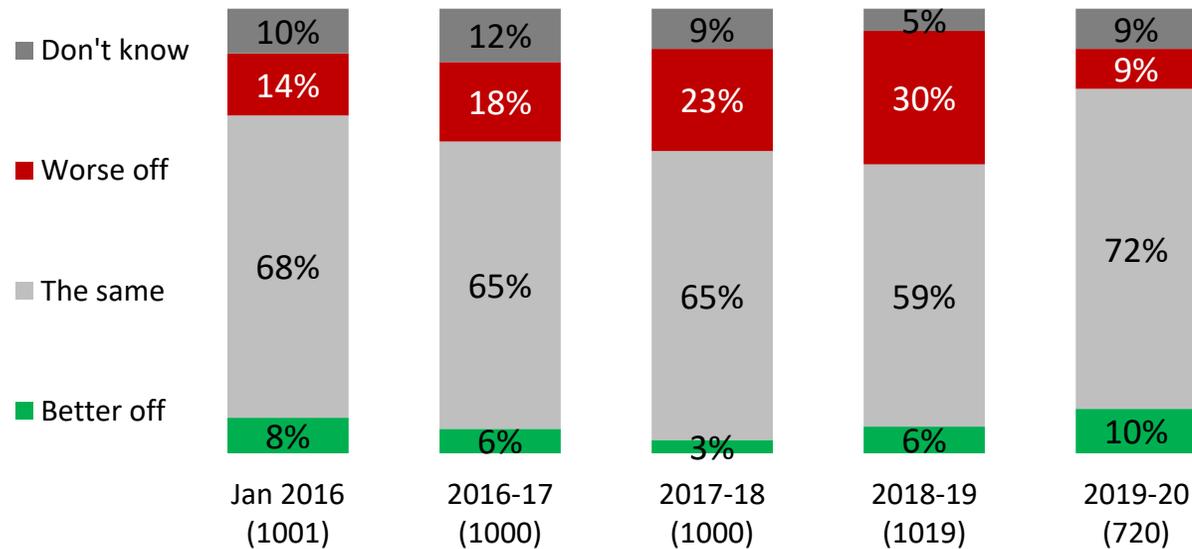


Sewerage in Wilford, western, can cause environmental catastrophe, which can be fatal

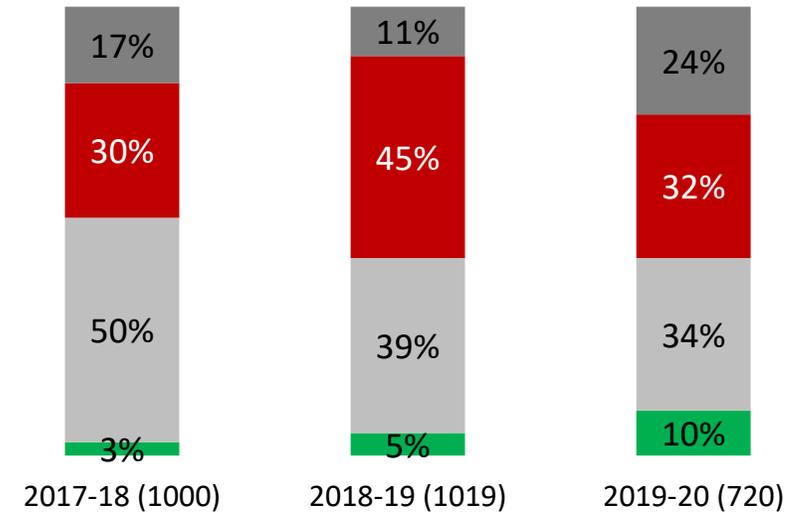
Financial Outlook

As the national picture for consumer confidence stabilises through 2019 (with some signs of improvement pre-COVID19), there is a feeling things will 'stay the same' rather than actively get worse for Wessex Water households. Growing uncertainty around the economic fate of the UK through a year dominated by Brexit uncertainty.

Q11 Do you expect your household to be better off, worse off or about the same in the next 12 months? (Base: All)



Q11b Thinking about the UK nationally, do you expect the economic climate to be better, worse or about the same in the next 12 months? (Base: All)

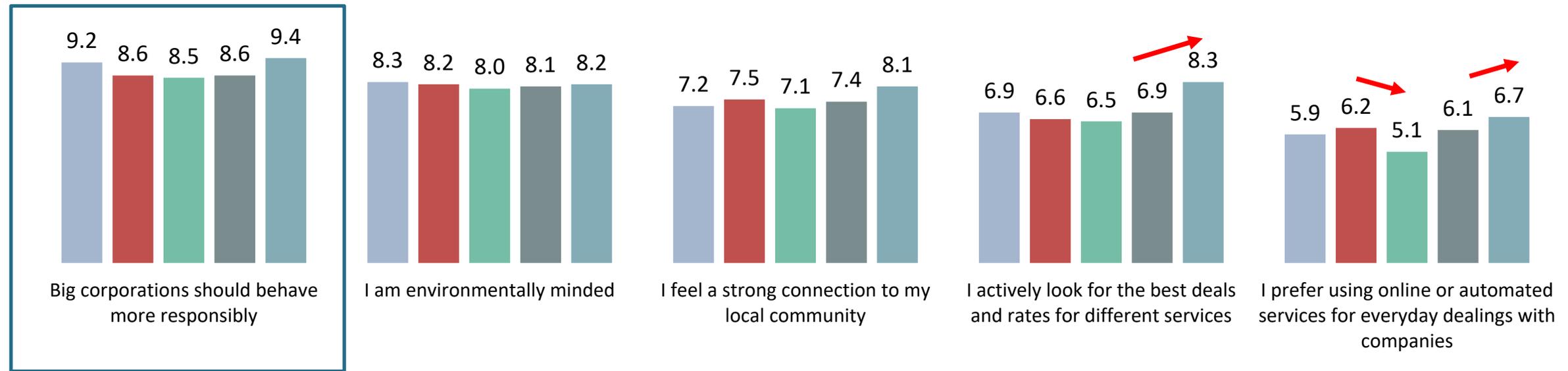


External Factors

- Wessex Water customers feel more strongly than ever that big companies should act responsibly; with the bedding in of YTL branding, Wessex need to be mindful of this
- Continuing rebound in preference in use of automated services – a sign that Wessex Water should place greater emphasis on developing online / digital facilities?

Q36 How strongly do you agree or disagree with the following statements? (Mean out of 10) Base: All

■ Jan-16 ■ 2016-17 ■ 2017-18 ■ 2018-19 ■ 2019-20



Personal Concerns

Concern about housing shortages, water shortages and greenbelt reduction have all reduced this year – as Brexit concerns saturate popular consciousness. Water shortages remain a less widespread worry than threats to greenbelt.

QF5C. To what extent, if at all, does ... concern you personally ? (Base: All)

Mean

■ Does not concern me (1-5) ■ Concerns me (6-10) ■ Don't know

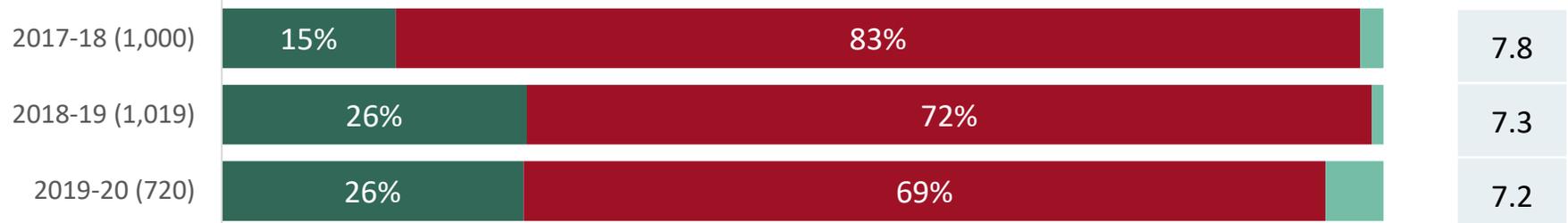
Housing shortages



Water shortages



Reduction of greenbelt



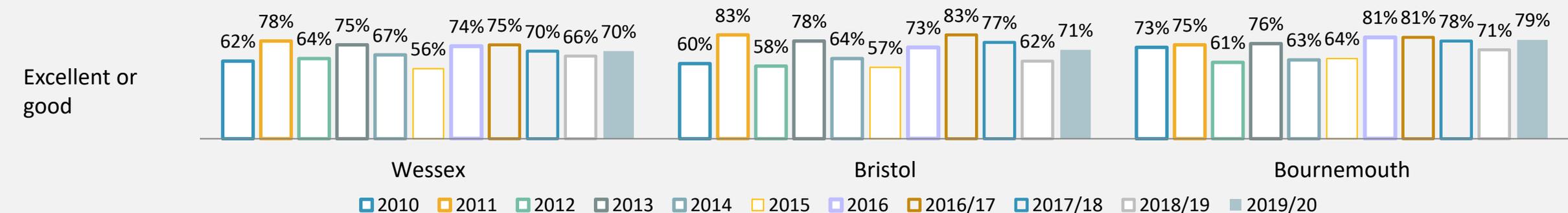
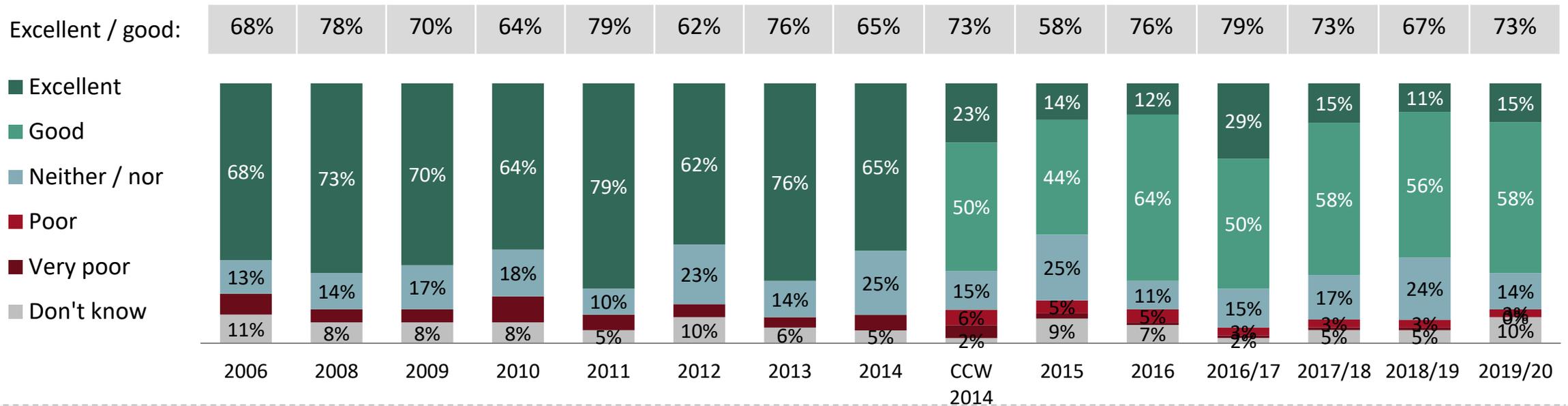


Appendix 2 – VFM and bills extra detail

Uninformed value for money of water supply

Uninformed value for money this year rebounds to 73%, up from the low point of last year. The rebound is evident in all three water supply areas – Bournemouth showing the highest rating at nearly 8 in 10.

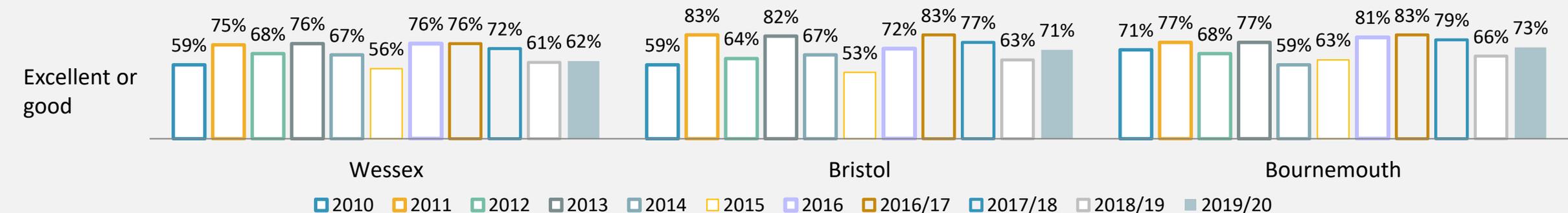
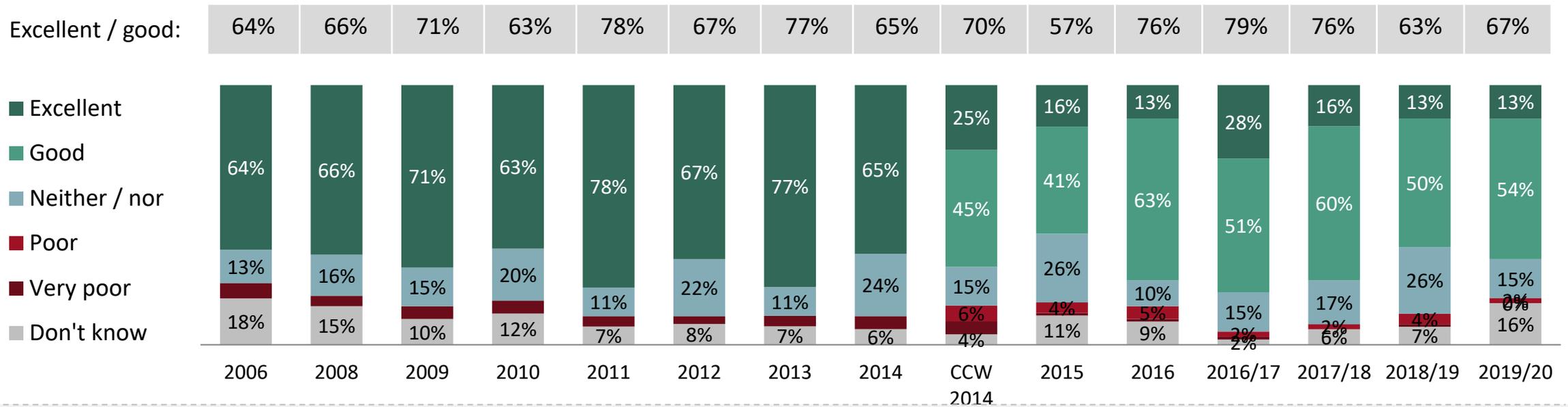
Q2(Q6d) How would you rate the drinking water supplies you receive from your water company in terms of value for money? (Base: all respondents)



Uninformed value for money of sewerage service

Uninformed value for money of sewerage services has risen this year since last year's low point, although overall we still do not see a return to the same level as 2017-18.

Q4 (Q7d) How would you rate the sewerage service you receive from Wessex Water in terms of value for money?
(Base: Not private supply (718))



Perceived bill size – estimated versus actual

Customers in Bristol and Bournemouth regions continue to overestimate their bill price, but no longer the case in Wessex, where estimates are most accurate (slightly underestimating on average)

Q20 (4a) Roughly how much do you think you currently pay, combining your water supply and sewage service? (Base: All those who can estimate bill, 438)

■ 2011
 ■ 2012
 ■ 2013
 ■ 2014
 ■ 2015
 ■ 2016
 ■ 2016/17
 ■ 2017/18
 ■ 2018/19
 ■ 2019/20



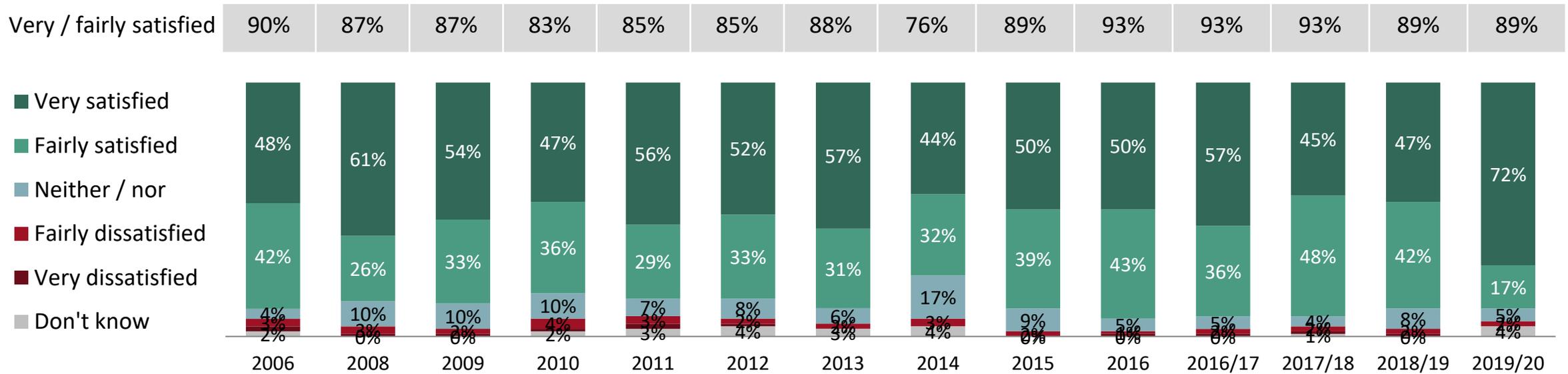


Appendix 3 – Satisfaction and NPS extra detail

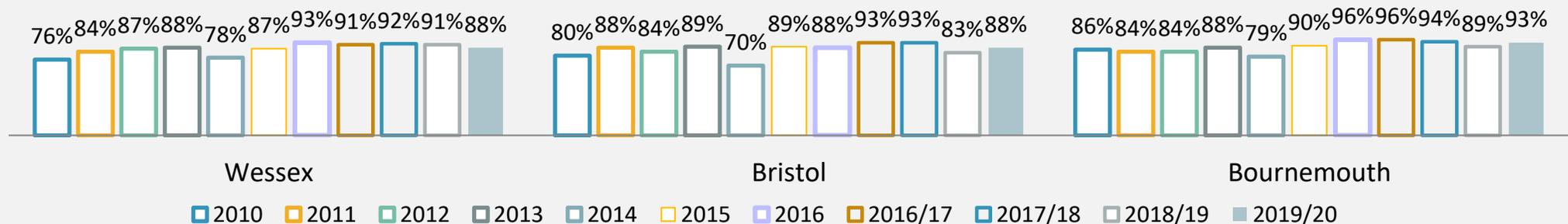
Satisfaction with water supply

Satisfaction with **water supply** specifically remains good at 89%, matching last year. The Wessex supplied area has seen a slight directional decline over the last year, as satisfaction in the Bristol and Bournemouth areas picks up slightly.

Q12(6a) How satisfied are you with the water supply you have received from your water company? (Base: All)



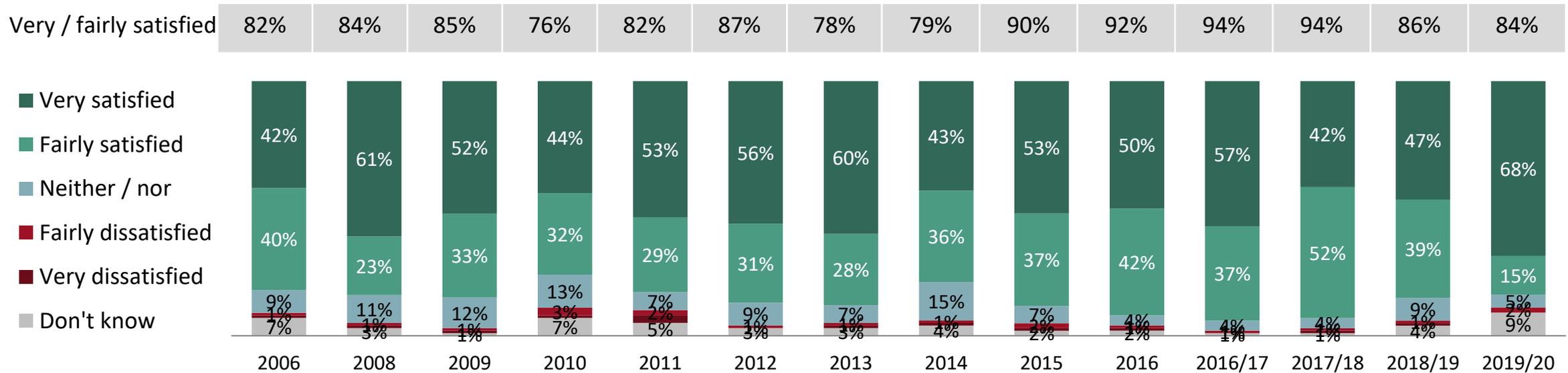
Very / fairly satisfied



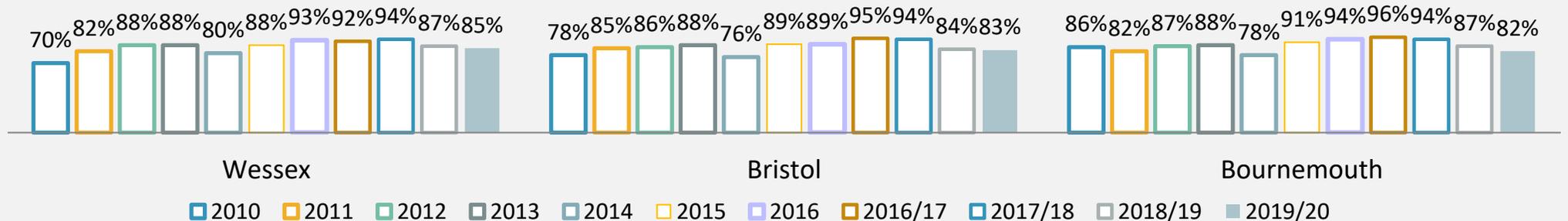
Satisfaction with sewerage services

Satisfaction specifically with sewerage services is in line with the historic norm – but remains below higher levels from 2015-18. All three supply areas see a similar level. Few are actively dissatisfied; the erosion of satisfaction is down to greater ambivalence / uncertainty.

Q13(Q7a) How satisfied are you with the sewerage service you have received from Wessex Water over the last 12 months? (Base: Not private supply)



Very / fairly satisfied



Reasons for being a 'promoter'

Generally happy / no problems

They provide a good service and never had any problems with them.

Because I've always been happy with the service they provide

Provide an effective and efficient service

Never had any problems with them

Never had reason to complain

Always used them, had good service

Simply no problems come to mind to not recommend them I am happy with the billing and the nice magazine we receive for free

I had cause to contact them because of an internal leak and the response was impressive

Increased mentions of environment

They support the environment and stop rivers from being polluted

They have a good track record for trying their best to work to help the environment

They look after the sewerage system and rivers making sure they keep it up to good standards

...cleans up rivers and stops pollution in rivers and lakes

...keep lakes rivers free from litter and chemicals

It's great for the environment and the community

...I think they look after beaches and rivers around here as well, making sure they are monitored and not affecting the environment too much

They perform really well generally and keep rivers and reservoirs clean

A close-up photograph of a fountain pen nib. The nib is black with a silver-colored tip. The tip is covered in a fine, granular texture. The nib is positioned vertically, and the background is a light, neutral color. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Appendix 4 – Image and comms extra detail".

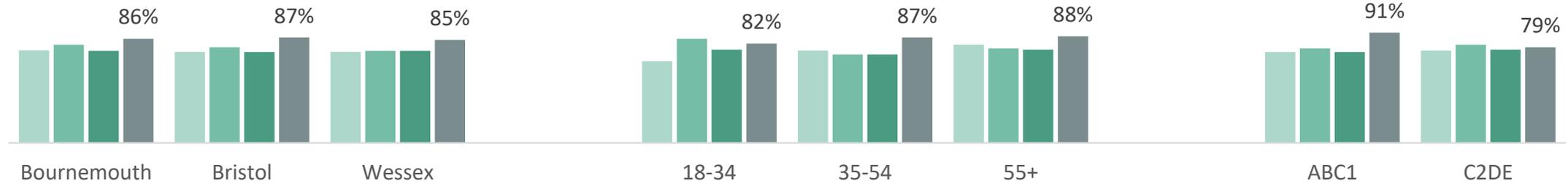
Appendix 4 – Image and comms extra detail

Components of Trust

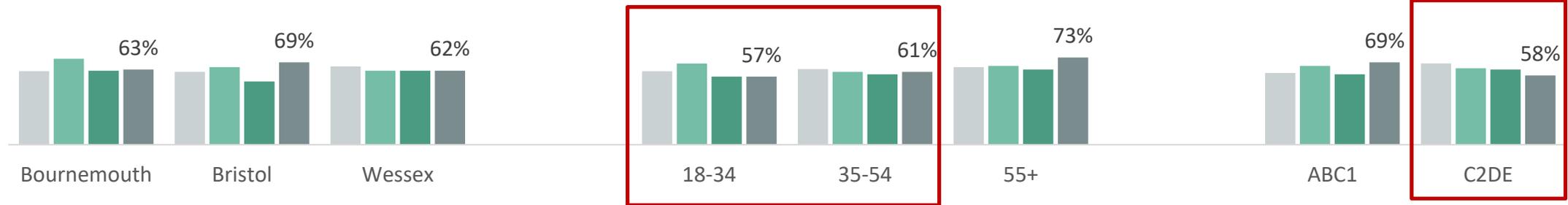
Components of trust – particularly the more emotional ‘caring’ - are adrift amongst the lower social grade groups and younger age cohorts. More focus on engaging with these groups at a personal level?

2016/17 2017/18 2018/19 2019/20

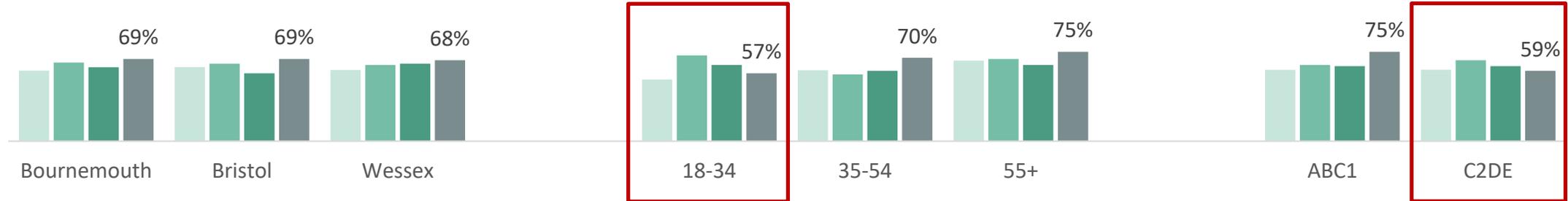
They are experts at what they do



They care about their customers



They deliver on their promises

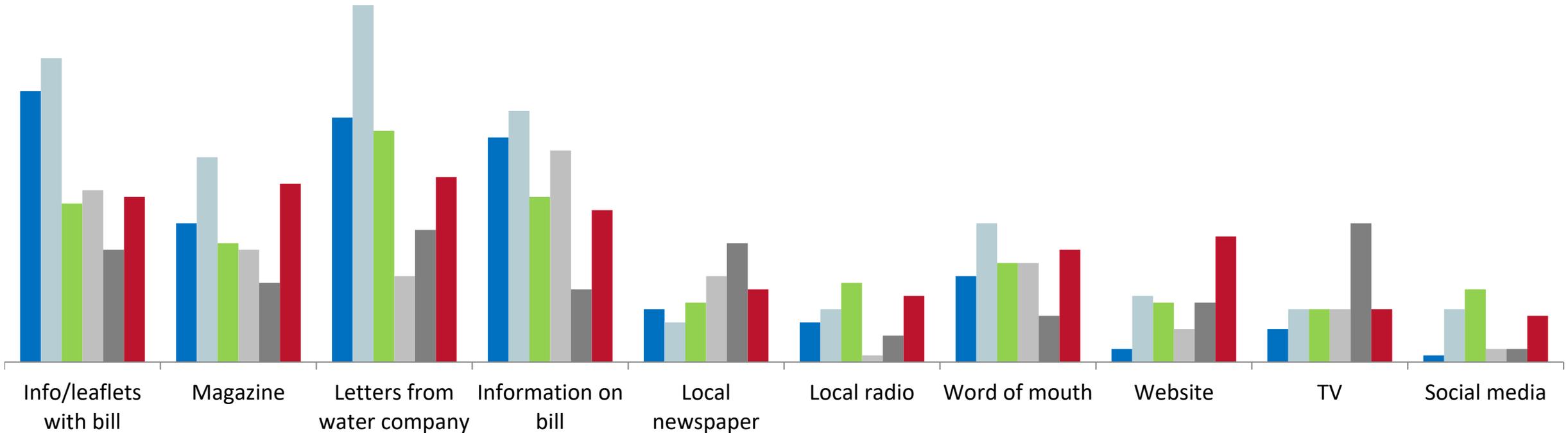


Recall of recent communications by segment

The more engaged segments are notably more likely than others to recall information through more 'formal' channels like leaflets with the bill and letters from Wessex Water. To reach less engaged segments is there more potential via more 'intrusive' or personally targeted and relevant channels?

Q24(19) Please can you tell me all the different ways that you have received information from your company or heard about your water company in the last year? (Base: All 2019-20)

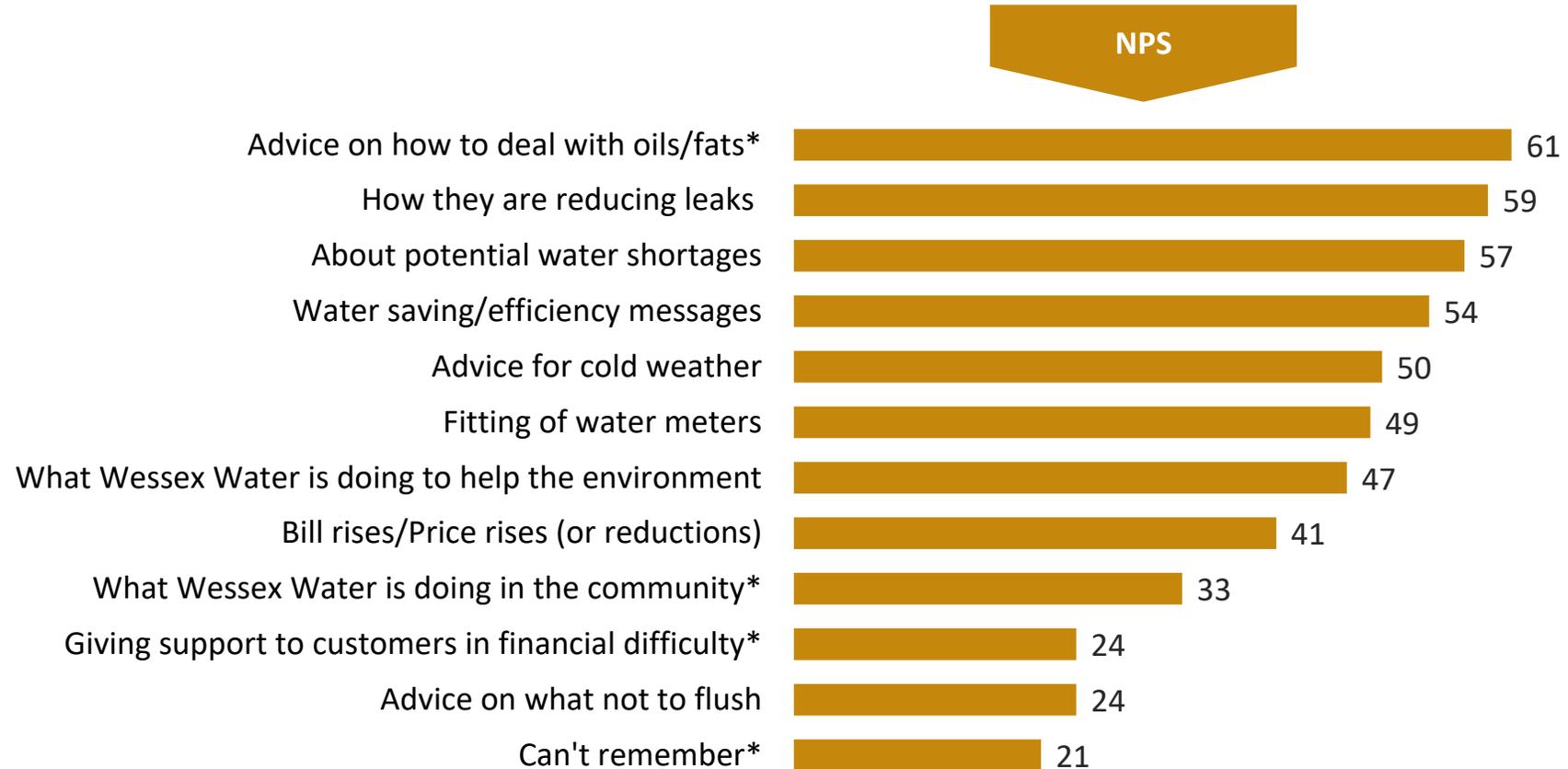
■ Engaged comfortable ■ Engaged stretched ■ Potentially receptive ■ Settled unengaged ■ Transactional unengaged* ■ Cost-sensitive unengaged



Net promoter score – by recall of comms message

Some evidence that those who remember certain information or messages about Wessex Water have a higher NPS. We cannot be sure of causality (those more 'involved' may register certain messages) but there is a sense that widely relevant, practical messages and positive actions correlate with higher NPS, along with environmental action.

Customers who have heard / seen each of these topics of information about Wessex Water



Q25. And what did you hear about Wessex Water or what was the subject of that information?

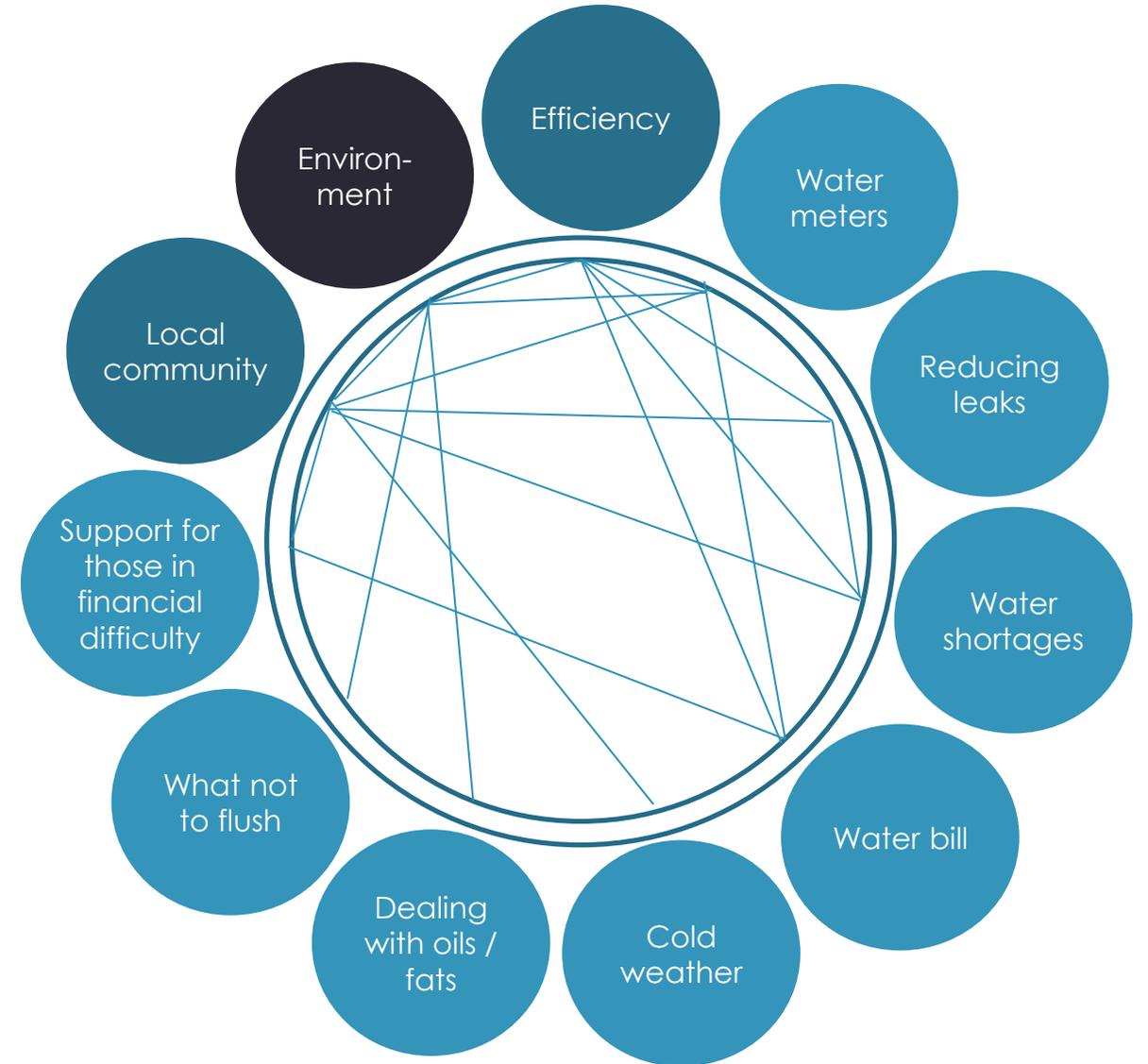
* CAUTION Low sample sizes (<80) – indicative only

Communication themes

There are many different messages Wessex Water may need to communicate. They are often interrelated - and might not be clearly defined in consumers' minds. Wessex may need to consider what to focus on to help build a 'single-minded' brand (reasons to believe in 'For You. For Life').

The most effective focal points for communication are likely to be widely relevant and engaging, that relate to Wessex Water activities with tangible benefits to customers. Could 'pillars' or themes of communication be used to structure campaigns?

Some evidence that (pre-COVID19) information about helping the environment has become more salient – and is associated with higher NPS and trust. Messages related to environment could be easy for people to grasp (plastic as a pollutant **in water** is a widespread popular concern); they also may be more readily passed on via 'word of mouth' as it is an emotive topic that people care about. The next waves of research will provide evidence if 'environment' could be a theme for future focus, or if it reflects a transient phase of public attention.





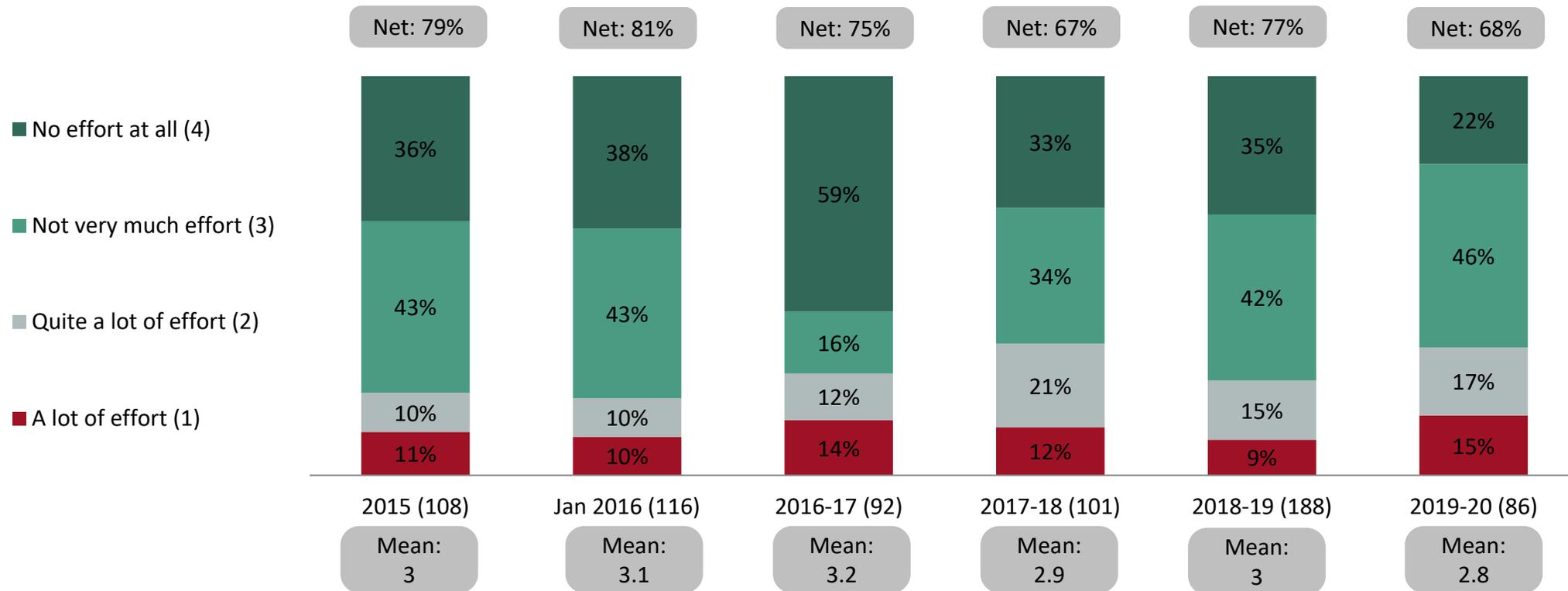
Appendix 5 – Dealing with queries

Effort – dealing with queries

The effort score has fluctuated year-on-year. Given relatively small base sizes, the changes over the last two years are not significant.

Q7(2c) Taking everything into consideration, how much effort did it take you to resolve your query with Wessex Water?

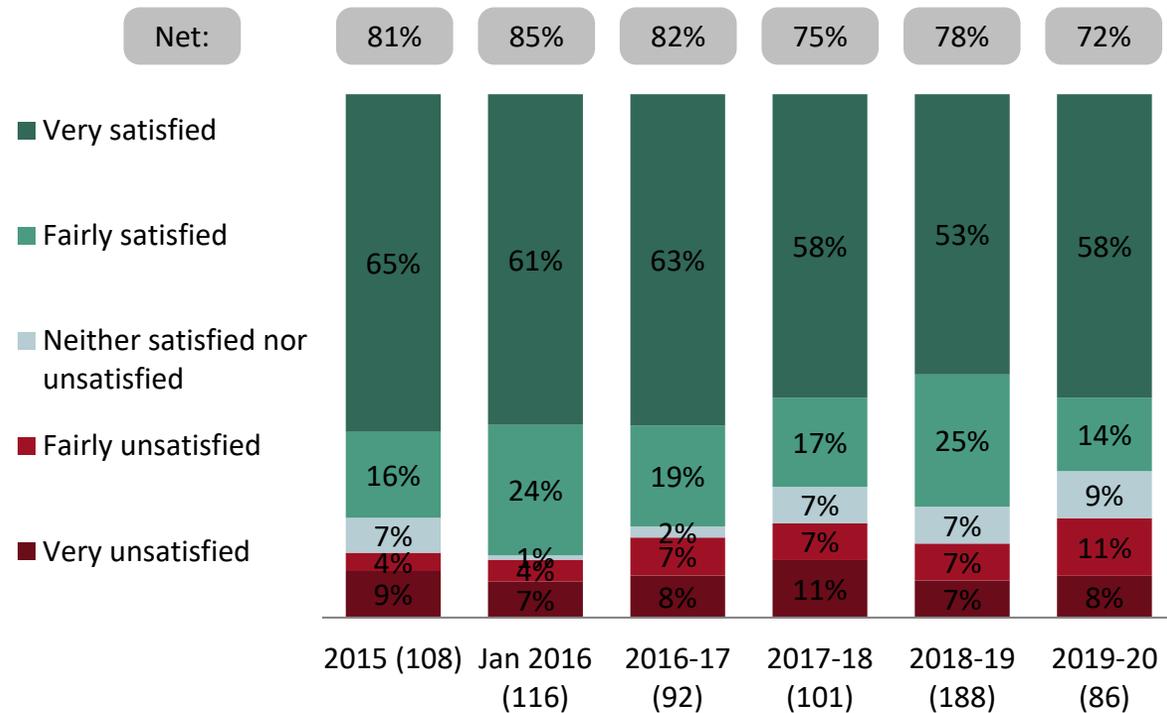
Base: Contacted Wessex with a query relevant to Wessex



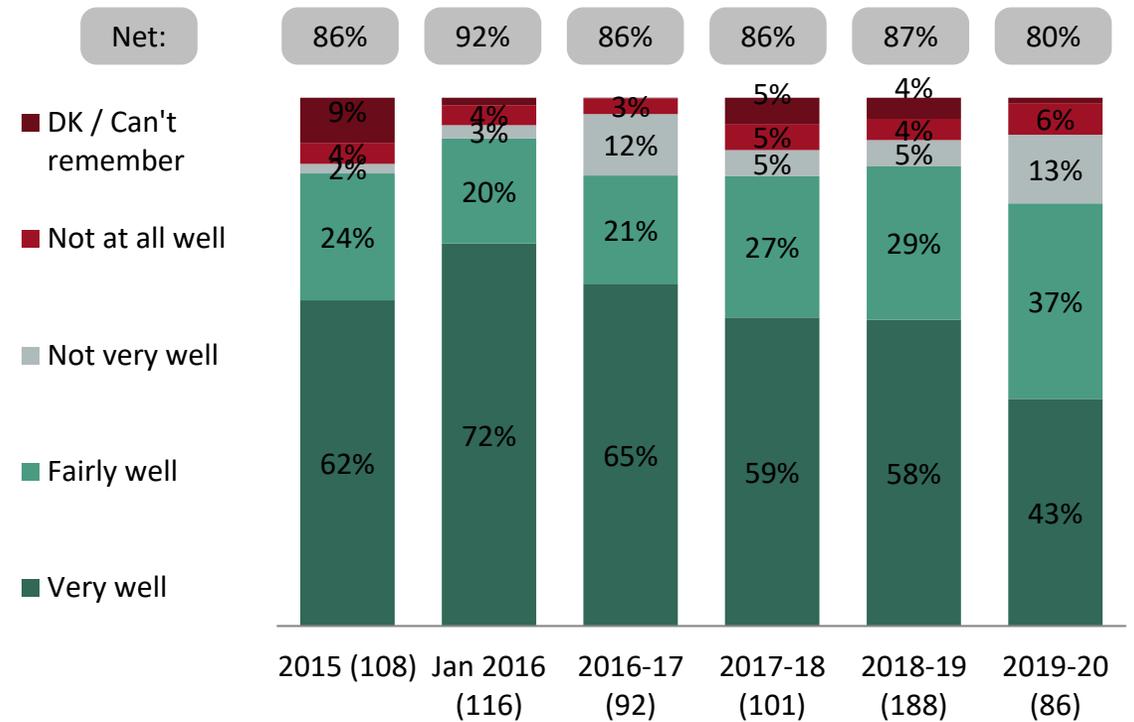
Satisfaction and fair treatment – dealing with queries

Satisfaction with how queries were dealt with has remained at around 7 in 10, and there's no significant change in perception of fairness – over 8 out of 10 rate Wessex as performing well for fair treatment.

Q8(2d) And overall, how satisfied were you with the way your query was dealt with by Wessex Water?



Q9a (Q3c) Thinking back to the contact you've had with your water company in the last 12 months, how well do you think they have performed in terms of treating you fairly?



Base: Contacted Wessex with a query relevant to Wessex

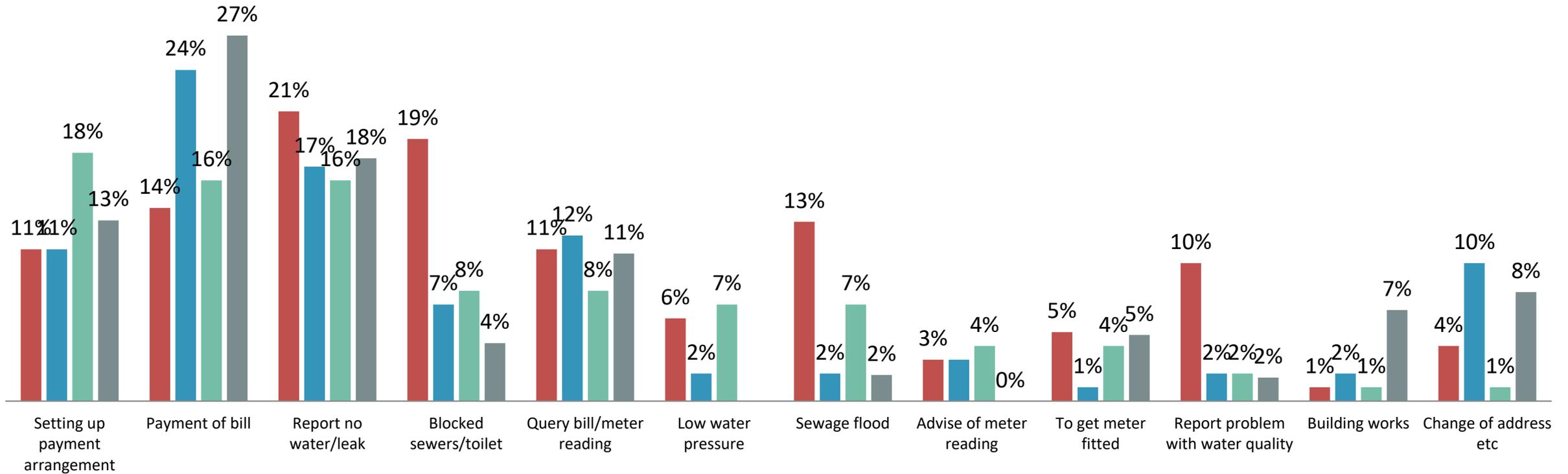
Reasons for contact

Amongst our sample who have contacted Wessex Water in the last year, there appears to be a higher incidence of service issues than in previous years.

Q6 (2b) What was the main reason for your contact?

Base: Contacted Wessex with a query relevant to Wessex

■ 2019-20 (86) ■ 2018-19 (188) ■ 2017-18 (101) ■ 2016-17 (92)



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.

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).

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

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

- 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')