

Image Tracker 2020-21

Annual presentation
25th May 2021

Value for Money

Satisfaction &
NPS

Affordability

Image &
messages

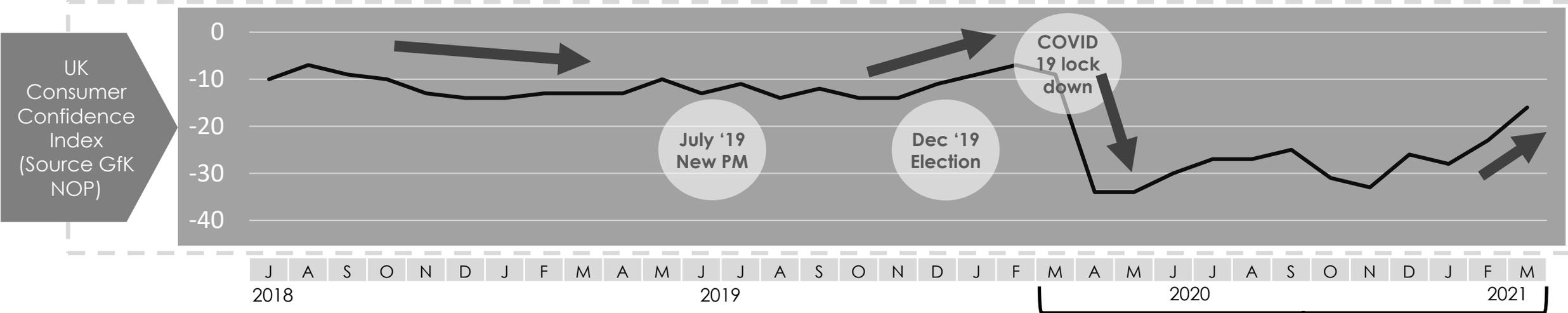
Touchpoints



As we hope to finally emerge from lockdown, it can be hard to remember the gravity and range of challenges brought by 2020-21

An unprecedented collapse in consumer confidence

Consumer confidence nationwide was showing some signs of improvement going into 2020, but this was severely impacted by Covid-19, and has remained very low over the last year, albeit with some signs of recovery in 2021.



23 March PM announces first UK lock down in the UK

10 May PM announces a conditional plan for lifting lockdown

4 July UK's first local lockdown comes into force in Leicester

14 Sept 'Rule of six' – indoor and outdoor introduced

5 Nov 2nd Lockdown begins (ends 2 Dec)

4 Jan 3rd Lockdown begins. Vaccine rollout begins

21 Mar More than 50% of adult population have had first vaccine dose

3 Dec Avonmouth explosion

Wessex Water Initiatives:

- Continued promotion of PSR
- Launch new region wide Covid-19 emergency funds
- NHS uniform washing rebate and other community initiatives
- Additional bill support (Covid-19)

A complicated and fast-changing consumer outlook

Blue Marble's wider longitudinal work has seen fluctuating trends over the course of a very unusual year.

April 2020

Initial post lockdown data suggested utilities (and especially water companies) lagging behind other sectors in their response to Covid-19. A lack of perceived proactivity / visibility?

Autumn 2020

- Earlier patience with reduced service levels evaporating
- Time in lockdown has focused some people more on reviewing service providers / renewals
 - Cost consciousness heightened ...
- ...yet this didn't always lead to action taken in switching: boredom / hunkering down.

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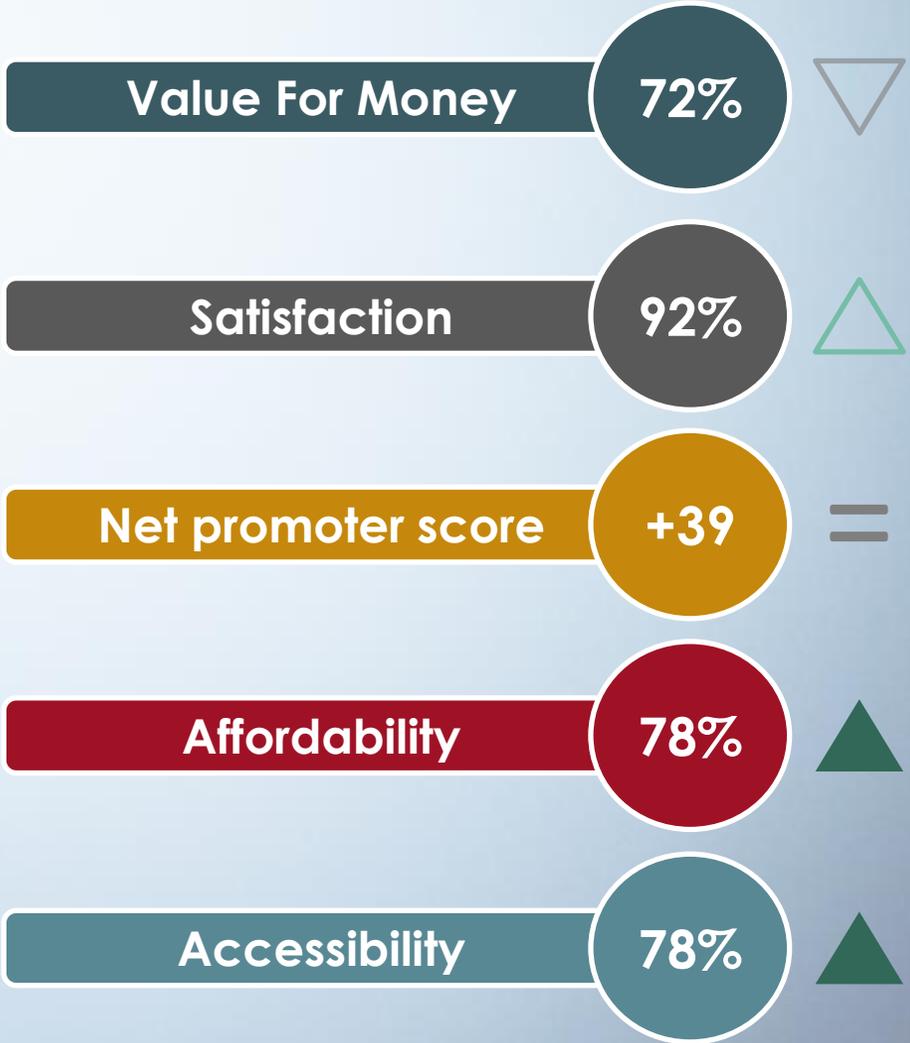
July 2020

- Approaching the end of lockdown 1, there was more positivity about utilities and essential services
- Awareness that companies are generally trying their best in exceptional circumstances
- High awareness and some take up of the range of areas where help offered mortgage holidays, car lease breaks, Council tax breaks etc.

Winter 2020-21

- Greater awareness of energy use (and bills going up)
- Many taking action to reduce energy use – even those who do not have affordability issues
- Meanwhile many also have built up savings with more money in the bank.

In spite of the wider context, key 'health' measures for Wessex Water remain resilient in 2020-21



Key

- ▲ Significant increase
- ▼ Significant decrease
- △ Directional increase
- ▽ Directional decrease



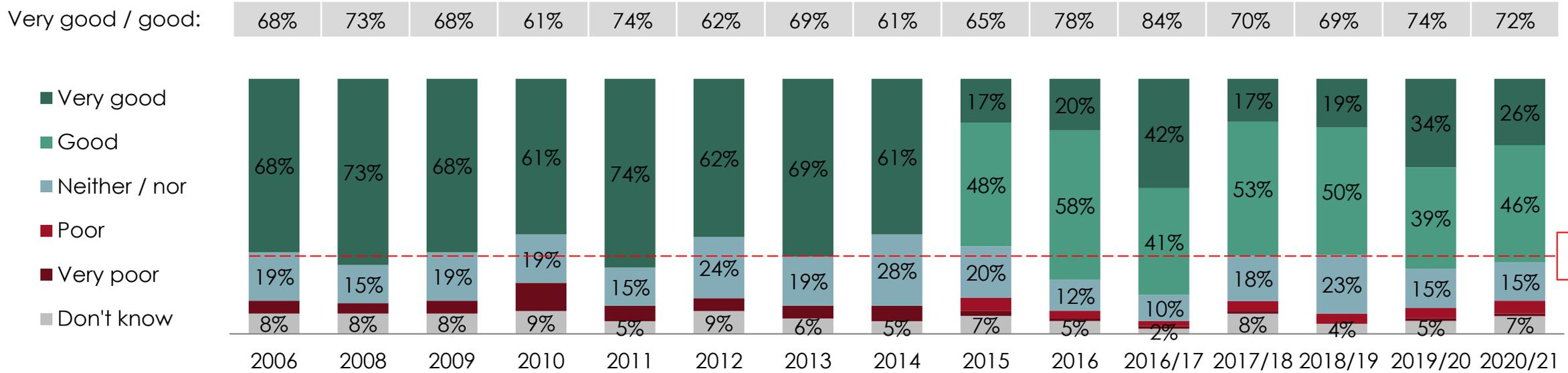
Value for Money

Overall value for money (VFM)

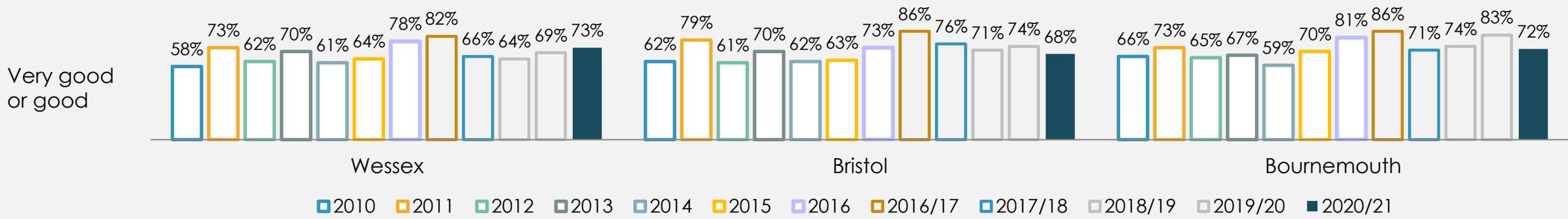
It is encouraging that in spite of the challenges posed by Covid-19, VFM is very similar to the previous year. The Wessex supply area shows signs of some improvement and is no longer behind Bristol and Bournemouth.

Q22. How would you rate drinking water supplies and the sewerage service you receive in your area in terms of value for money?

Base: All



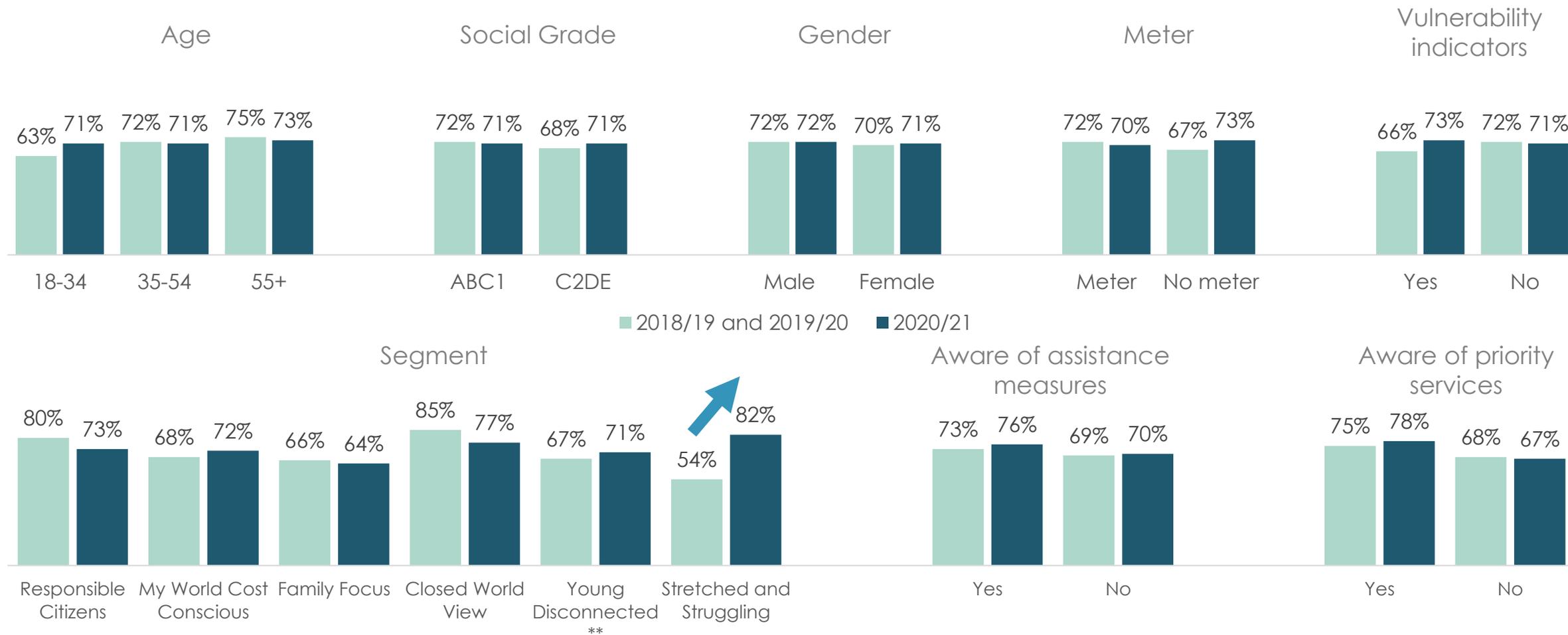
Top 2 mean



Overall VFM by key groups

Post Covid-19 there has been some equalisation of VFM ratings across different groups – improving notably for ‘Stretched and Struggling’ segment, and also signs of improvement for vulnerable and younger consumers. Various support initiatives (both by Wessex and more broadly) in response to Covid-19 may have played a part.

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 2018-19 and 2019-20 / 2020-21



* CAUTION Low sample size (<80); **CAUTION Very low sample size (<50). Data is indicative only

McDonald's

Signs that 'stretched and struggling' are feeling better about VFM than last year – will this be sustained?

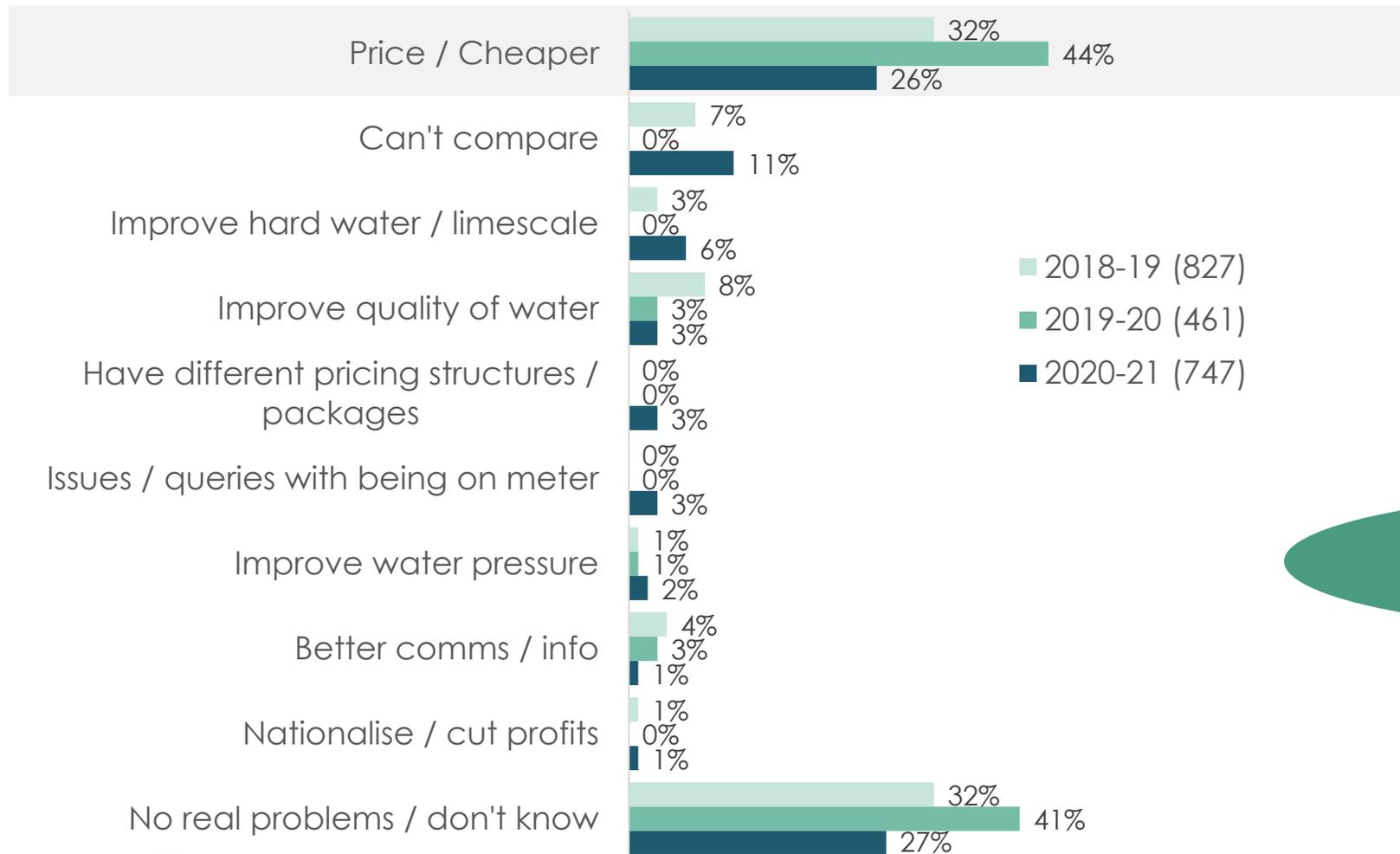


Improving VFM...

Simply making bills cheaper is still the most common response on how to improve VFM. Other secondary themes include improving water quality, and the idea of new pricing structures. Covid-19 may be a factor in terms of changing water use patterns at home, and the expectation of new ways to be able to pay (or reduce) bills.

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'



"Just if it was cheaper, that's it"

"The hardness figure should be on the bill"

"They were a bit expensive but when I needed to contact them because I was having difficulties paying the bill they were helpful"

"The water tastes like chemicals and it's really chalky"

They could make it cheaper but it's not too bad for the service they provide"

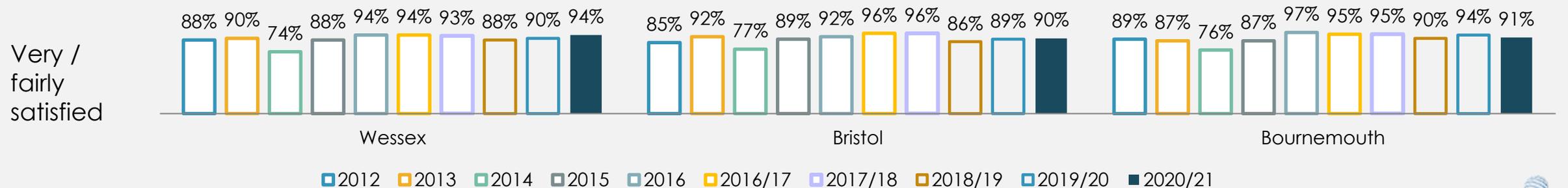
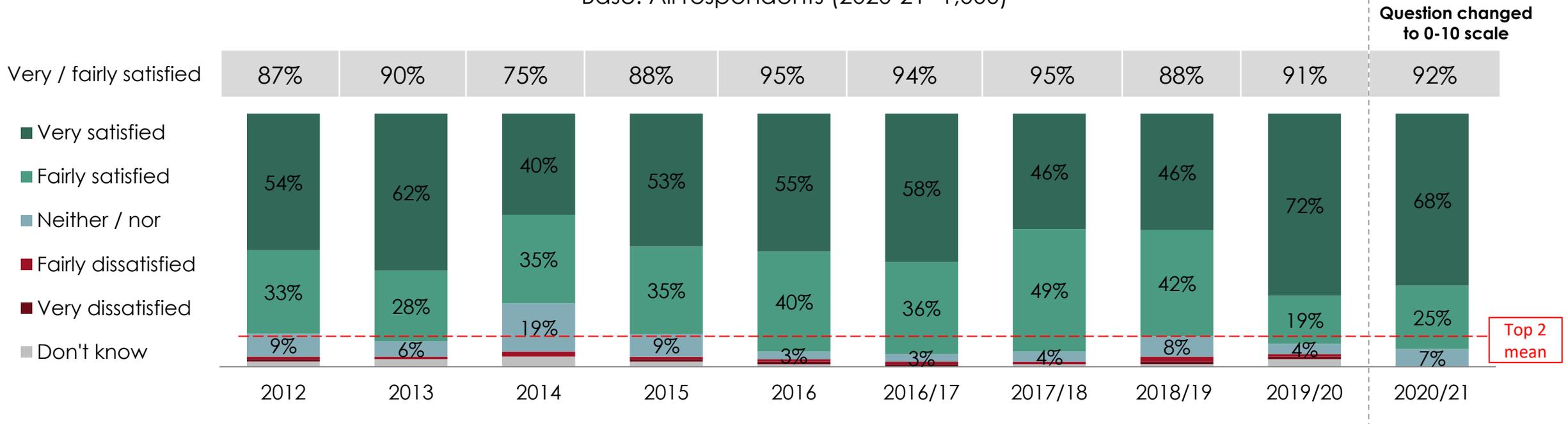


Satisfaction and Net Promoter

Despite the challenges through 2020 and into '21, overall satisfaction has remained strong - over 90% in all three supply areas. There's not much headroom for improvement, with a high proportion saying 'very satisfied'.

Q15 How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?

Base: All respondents (2020-21=1,000)



Why satisfied / not satisfied

Satisfaction is largely driven by simply being reliable and problem-free. For the minority of consumers who are less satisfied there's a mix of reasons including water hardness & quality, perceptions of water leaks / waste and the price – but it's important to stress that these are issues for only a small proportion of customers.

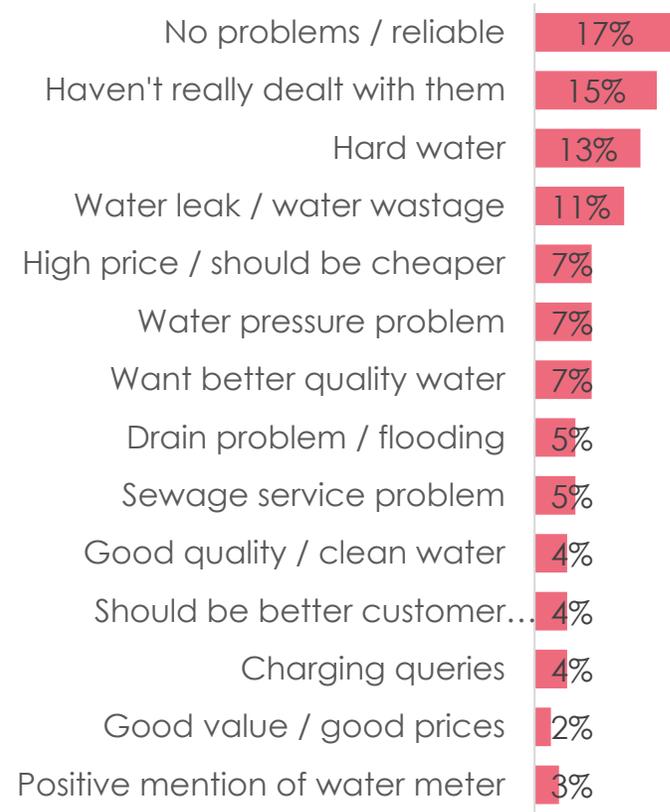
Q16 Why did you say this? Please explain as fully as you can why you gave your satisfaction score. Base: All respondents 2020-21

Those who are satisfied (score 7-10) (Base: 924)



"We've never had any issues so far and we've lived here for forty years"

Those who are less than satisfied (score 0-6) (Base: 76)



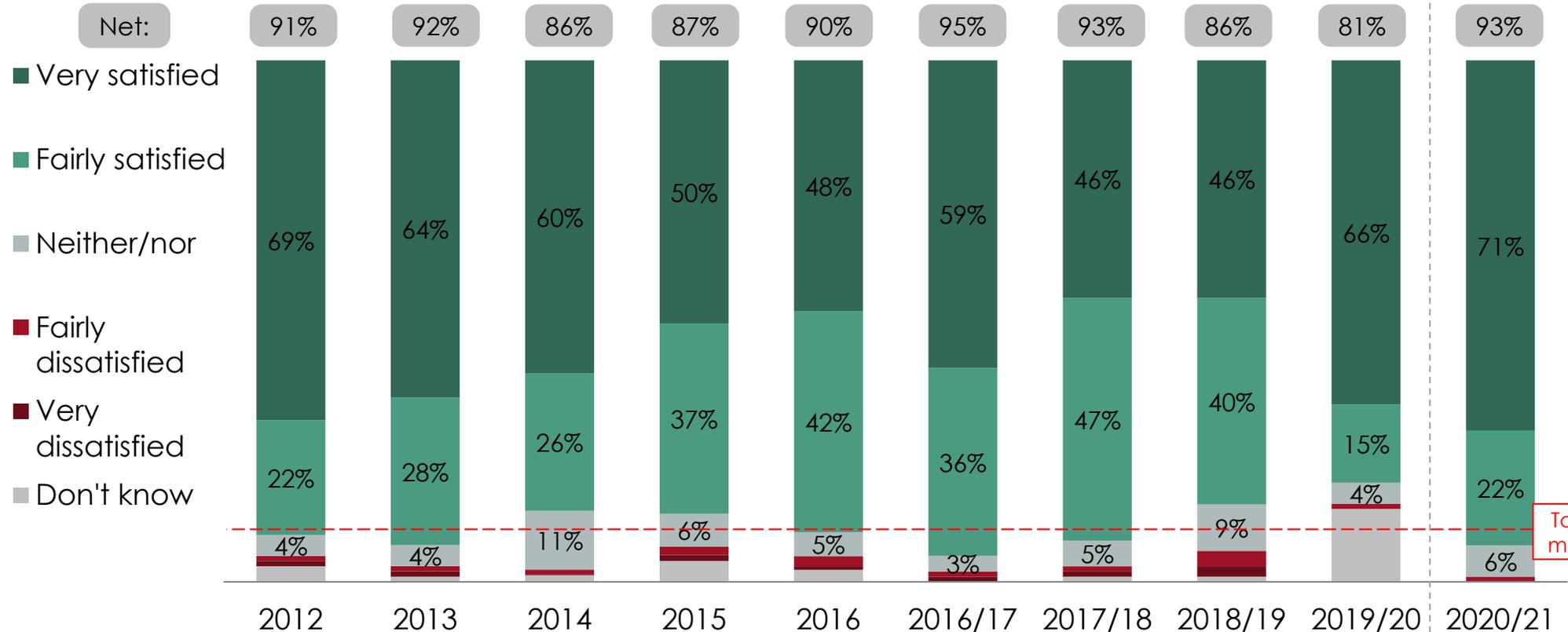
"Our water pressure is not that powerful"

Satisfaction with billing

A key driver of VFM – satisfaction with billing – has rebounded this year. There may be various influences, including familiarisation with the refreshed bill layout and format, the sense of greater flexibility around bill payment during Covid, and a more general sense that utilities and other organisations are more accommodating of people's needs.

Q14 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 responsible for paying the bill (2020/21=815)



Top 2 mean

NB: Question changed to a 0-10 scale in 2020-21

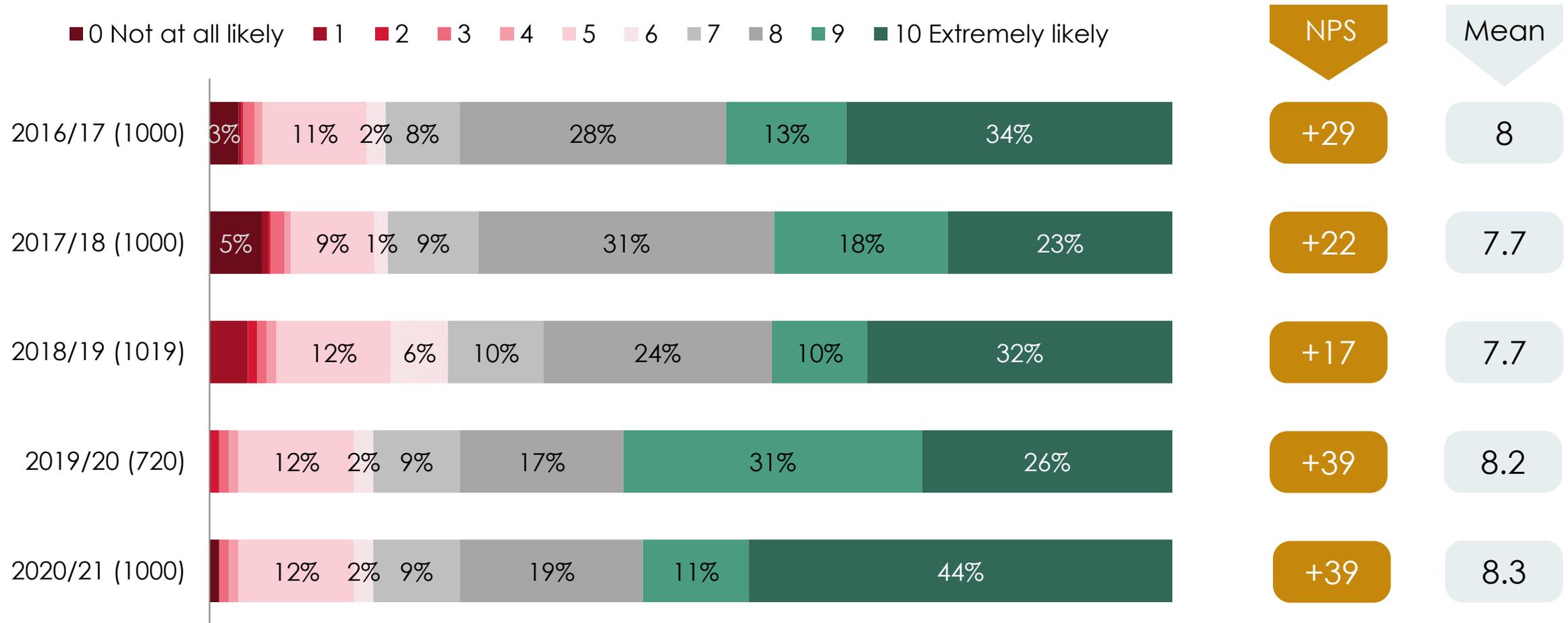
NB: question wording altered in 2016: 2010-2015: Overall how satisfied are you with the way Wessex Water handles your billing?
 2016: Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months

Net Promoter Score (NPS)

Across 2020-21, the NPS is has maintained the high score achieved last year, reinforcing that positive sentiment to Wessex Water has been resilient in the face of the challenges posed by Covid-19.

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 respondents

■ 0 Not at all likely ■ 1 ■ 2 ■ 3 ■ 4 ■ 5 ■ 6 ■ 7 ■ 8 ■ 9 ■ 10 Extremely likely



Reasons for recommendation score

Even 'promoters' often give a good score simply because they have had no problems – along with a significant minority who mention positive service experience (promptness/ efficiency; friendly/helpful and reliable & efficient). Amongst detractors, most simply don't have grounds for 'recommending'; few raise any active issues.

Q34 Why do you say that? Top answers for each group Base: All respondents 2020-21



**Promoters
(538)**

Had no problems 55%

Happy with service / satisfied – 21%

Can't compare/ only option – 12%

Sorts out issues promptly/ efficiently – 11%

Friendly/helpful – 8%

Reliable / efficient – 5%

Good (quality) / clean water – 3%

Well known / good reputation – 3%

**Passives
(278)**

Had no problems 33%

Happy with service / satisfied – 21%

Can't compare / only option – 21%

Price issue / expensive – 9%

Good (quality) / clean water – 4%

Sorts out issues promptly/efficiently – 4%

Don't know (enough) – 3%

**Detractors
(184)**



Can't compare / only option 39%

Don't know (enough) – 14%

No information on other companies – 7%

Don't give recommendations – 7%

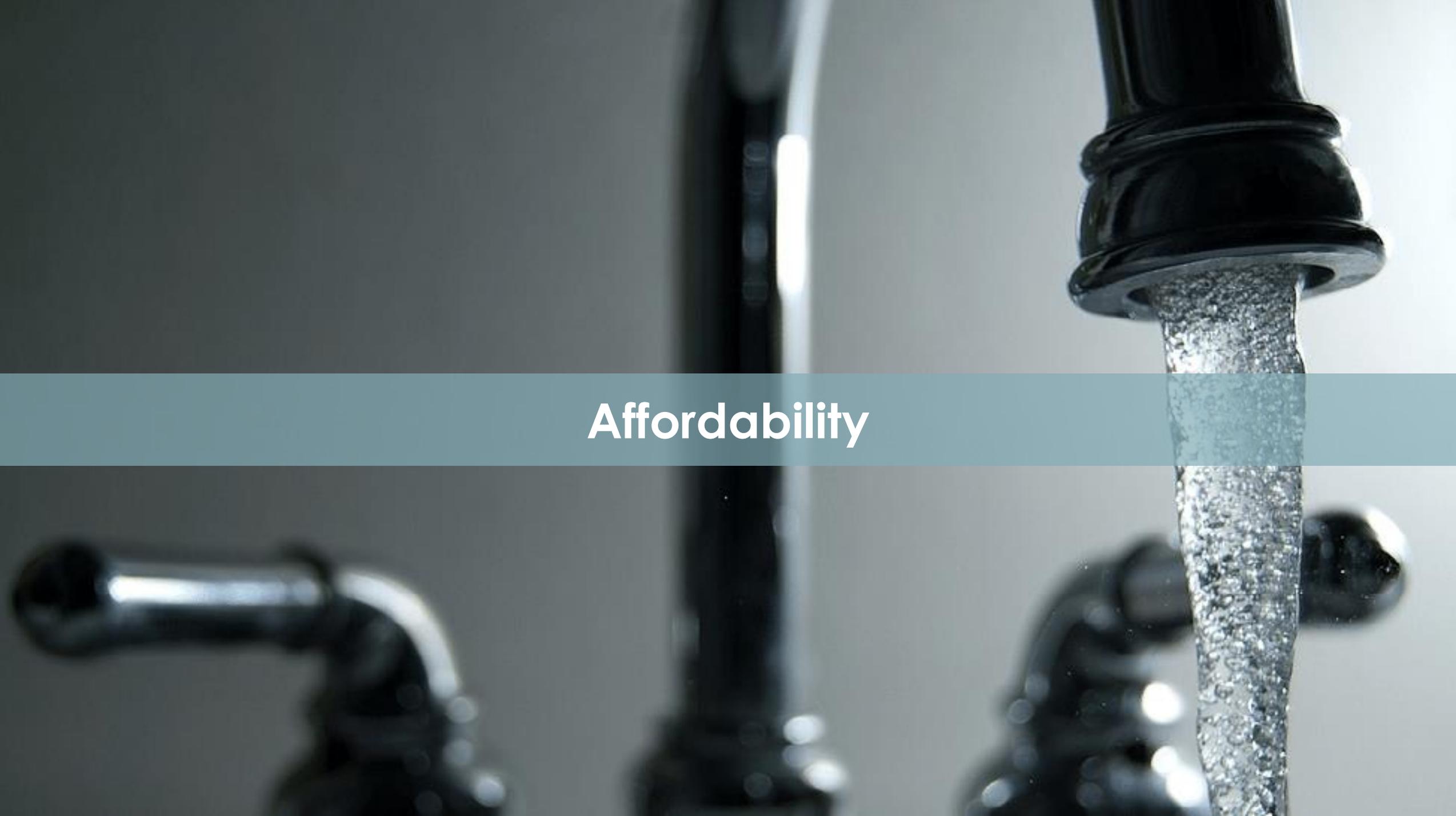
Price issue / expensive – 6%

Had no problems – 6%

Slow to respond – 3%



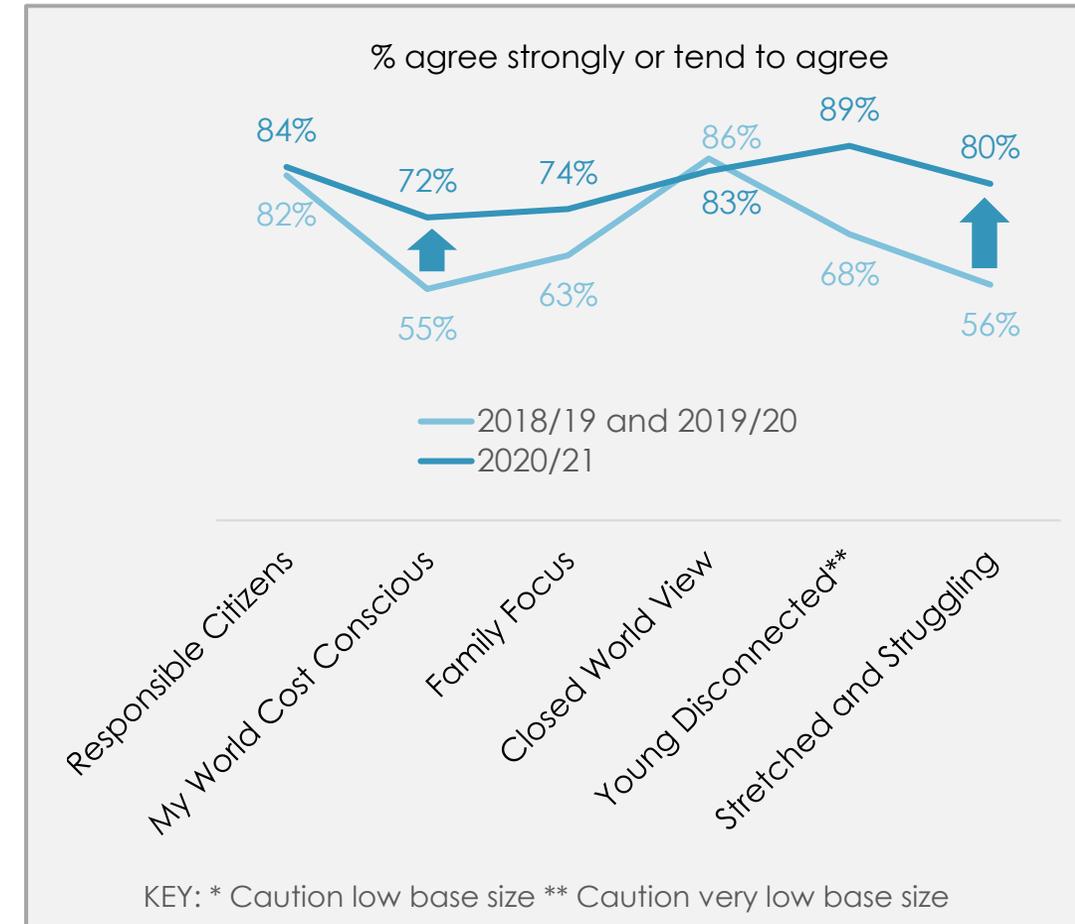
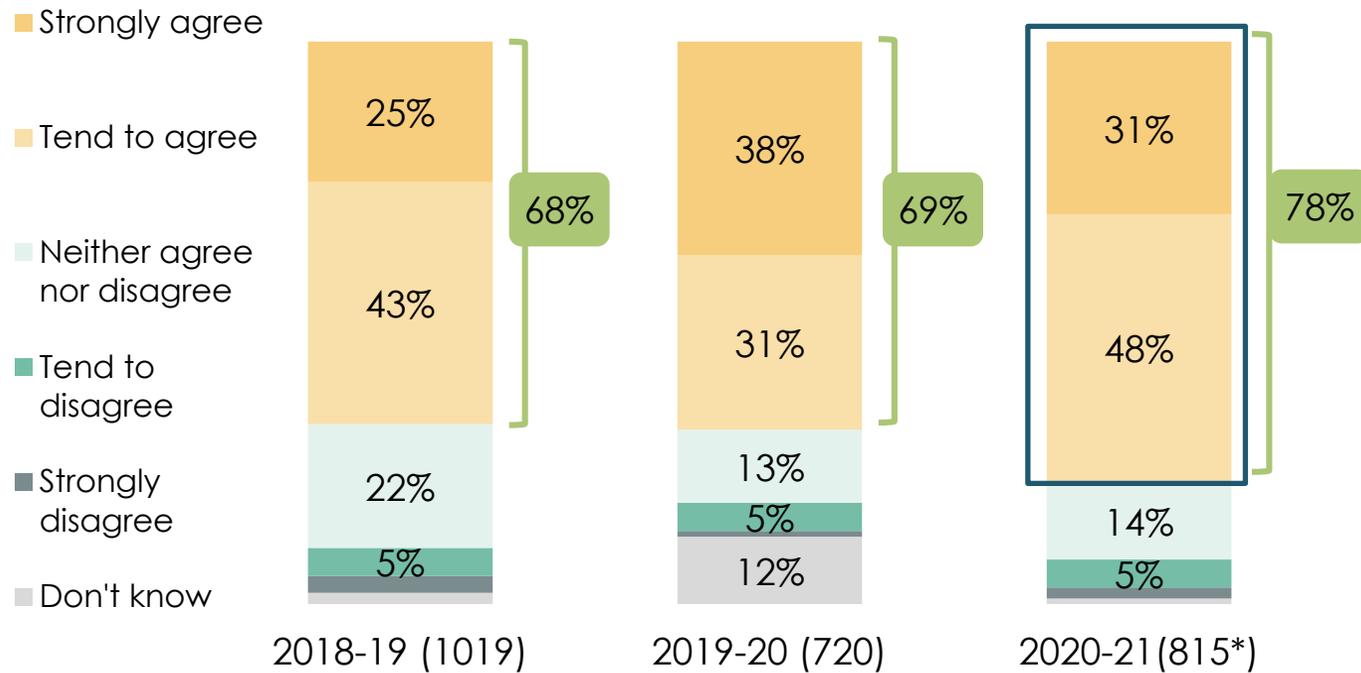
During the disruption brought about by the pandemic, ensuring reliability & dependability, and efficiently handling issues, may have been more important than ever



Affordability

Despite the onset of Covid-19, bill affordability has risen in 2020-21. This may reflect efforts to assist consumers - both from Wessex Water and wider support from government and other service providers. While it's encouraging that segments who worry more about their bill (especially 'Stretched and Struggling') now feel the bill is more affordable, will this remain the case when Covid-19 support is phased out?

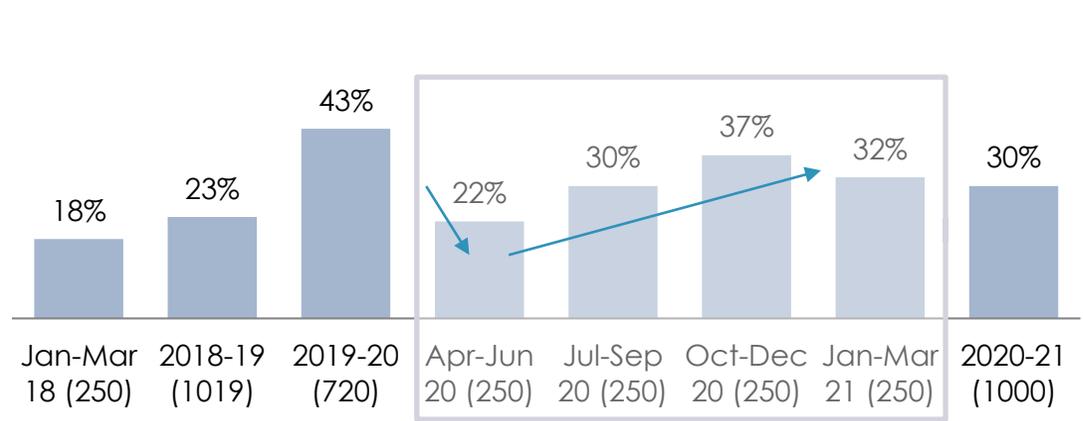
Q19b. How much do you agree or disagree that the total water and sewerage charges that you pay are AFFORDABLE to you? Base: All bill payers



Awareness of Assistance Measures

Immediately post-Covid there was a dip in awareness of Wessex Water’s financial assistance measures – these may have been overshadowed by other new high profile Covid-related support (e.g. furlough). Meanwhile awareness of other (priority) services from Wessex have held up well.

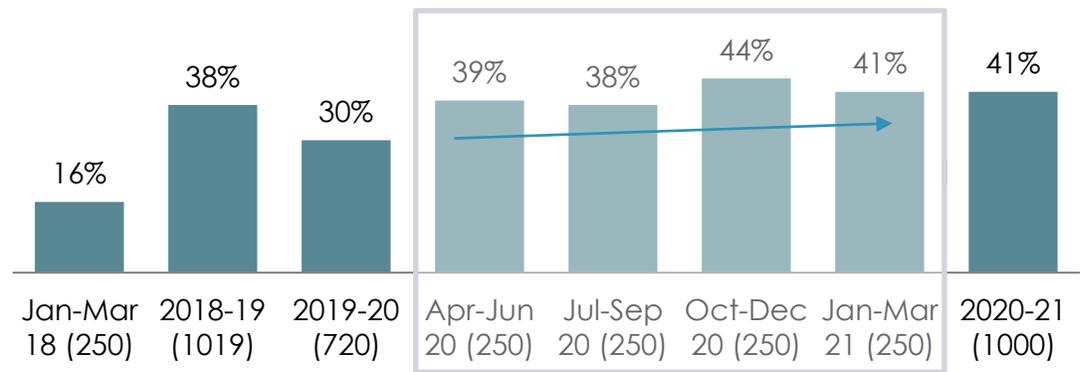
QF10 Are you aware of any kind of assistance that Wessex Water offers for customers **who struggle to afford their water bill**? (Base: All respondents)



30%
Aware for 2020-21
(33% of bill payers)

- Higher amongst:**
- Responsible Citizens (38%)

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



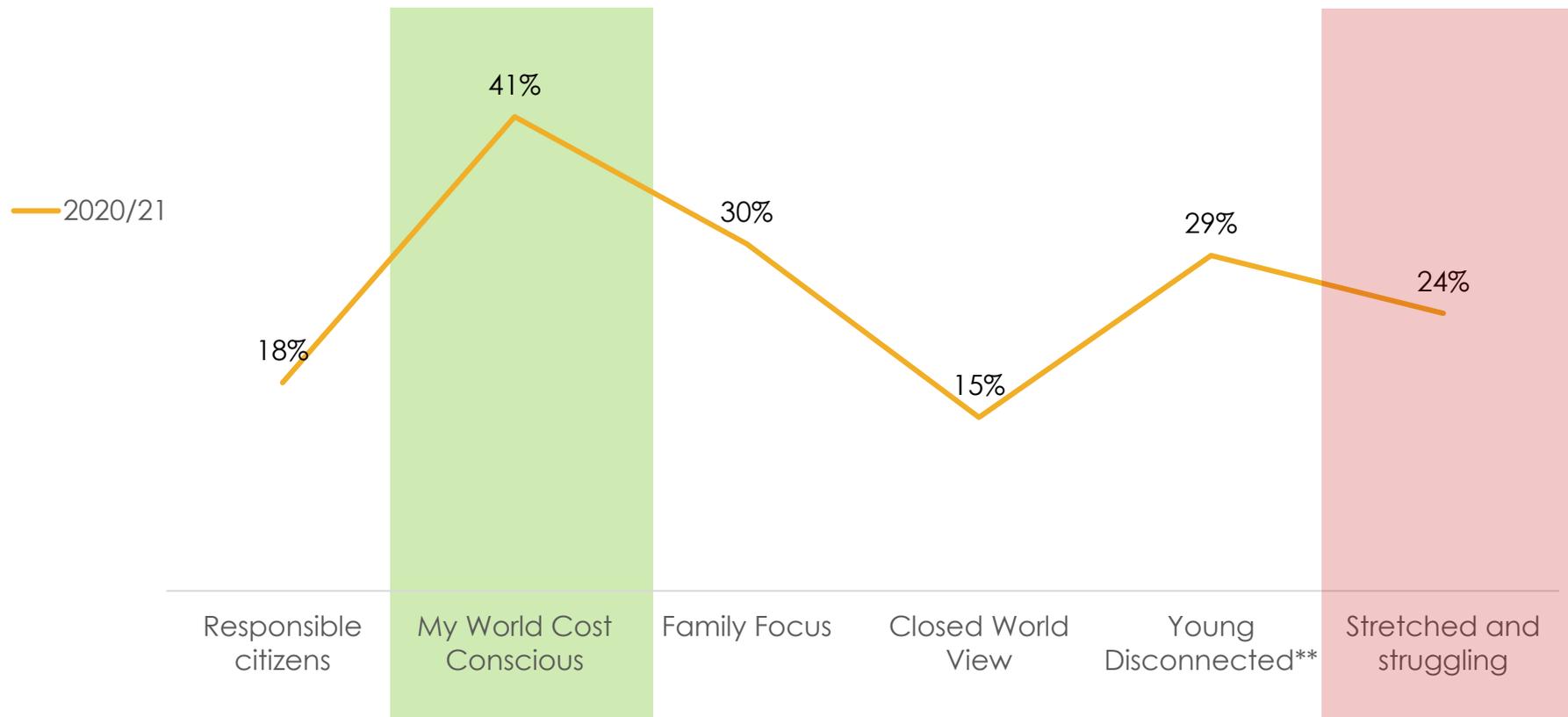
41%
Aware for 2020-21
(43% of bill payers)

- Higher amongst:**
- Those who recall Wessex Water social media (60%) and magazine (50%)
 - Family Focus (49%)
 - My World Cost Conscious (47%)

Perception that Wessex Water helps those less able to afford their bill

Perceptions of Wessex Water helping those less able to afford their bill differs between segments; 'My World Cost Conscious' are more likely to agree. Meanwhile, even though 'Stretched and Struggling' are feeling more able to afford their bill this year, this is not necessarily because they feel Wessex Water is helping them do so – other factors at play? (e.g. furlough?).

Q17 How much would you agree or disagree - Helps those who are less able to afford their bill? Base: All respondents in each segment



Note that recall of the Wessex website and social media correlate with greater endorsement of 'helps those less able to afford their bill' – are people finding out about financial support in these ways?






FOR YOU. FOR LIFE.

Your account Help and advice Community Environment Service

SUPPORT DURING CHALLENGING TIMES

◀ We can lower your bill until you get back on track.

Find out more

SEARCH FAQs



MORTGAGES

Government announces three-month mortgage holiday in Covid-19 package

The Government's announcement means all lenders will now have to honour the three-month time frame.

ROZI JONES | 18TH MARCH 2020

Covid 19 Hardship relief

As part of National and Local Government's response to the Covid 19 pandemic, the council has introduced a scheme to reduce the council tax payable by Bath and North East Somerset residents who receive Council Tax Support and are of working age.

Support for you... during challenging times

Are you worried about being able to pay your water bill due to Covid-19? We're here to help.

If you have a loss of income directly due to Covid-19 our **Assist** scheme is available for you during these challenging times.

We can **lower your water bill** based on your ability to pay until you're back on track.

For more information and to apply for free, visit wessexwater.co.uk/help2pay or call our friendly team on 0345 600 3 600 (Monday to Friday 8am to 8pm, Saturday 8am to 2pm).

Wessex Water YTL GROUP **FOR YOU. FOR LIFE.**

Affordable bills for all

During these testing times, many are worried about what the future holds for their finances. If you're facing financial difficulty, either short-term or long-term, we are here for you.

Need to lower your bill? If you're unable to afford your water bill, we can help. We can reduce your bill until you're back on track. We can also help you to get back on track.

Looking to save money? We can help you to save money on your water bill. We can help you to get back on track.

Are you a pensioner on a low income and missing out? More than 21,000 of our low income pensioners are receiving a discount of around £60 a year off their water bill.

Want to repay water debt and get back on track? We can help you to repay your water debt. We can help you to get back on track.

Sign your loved ones up to Priority Services We can help you to sign your loved ones up to Priority Services. We can help you to get back on track.

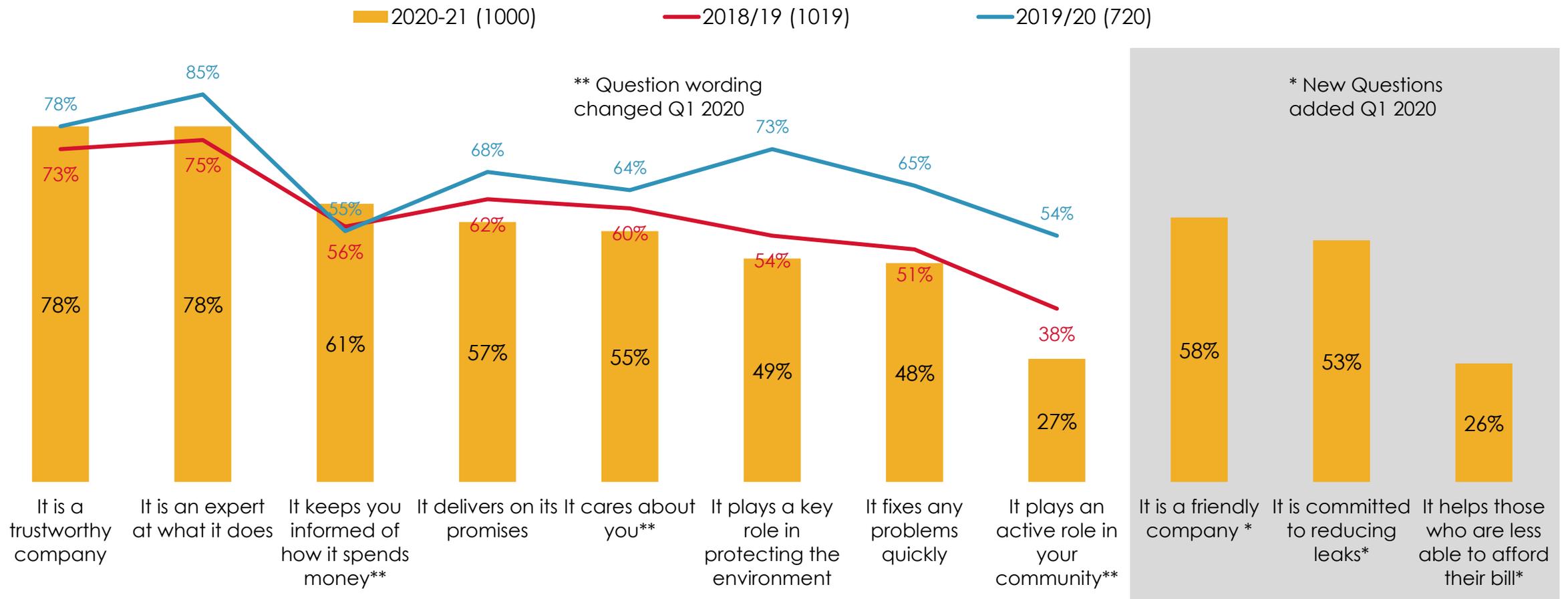


Image and Message recall

Image of Wessex Water

Across 2020-21 'trustworthy' holds up strongly – likely to be particularly important in the current climate - and the key element of 'keeping informed on spend' has improved. Meanwhile appreciation of Wessex Water's local community and environmental roles have diminished this year – less visible during lockdown as a number of initiatives (e.g. education & events) were halted. (Note there are early signs of growing environmental associations in Quarter 4 – to be monitored).

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



Recall of messages / information about Wessex Water

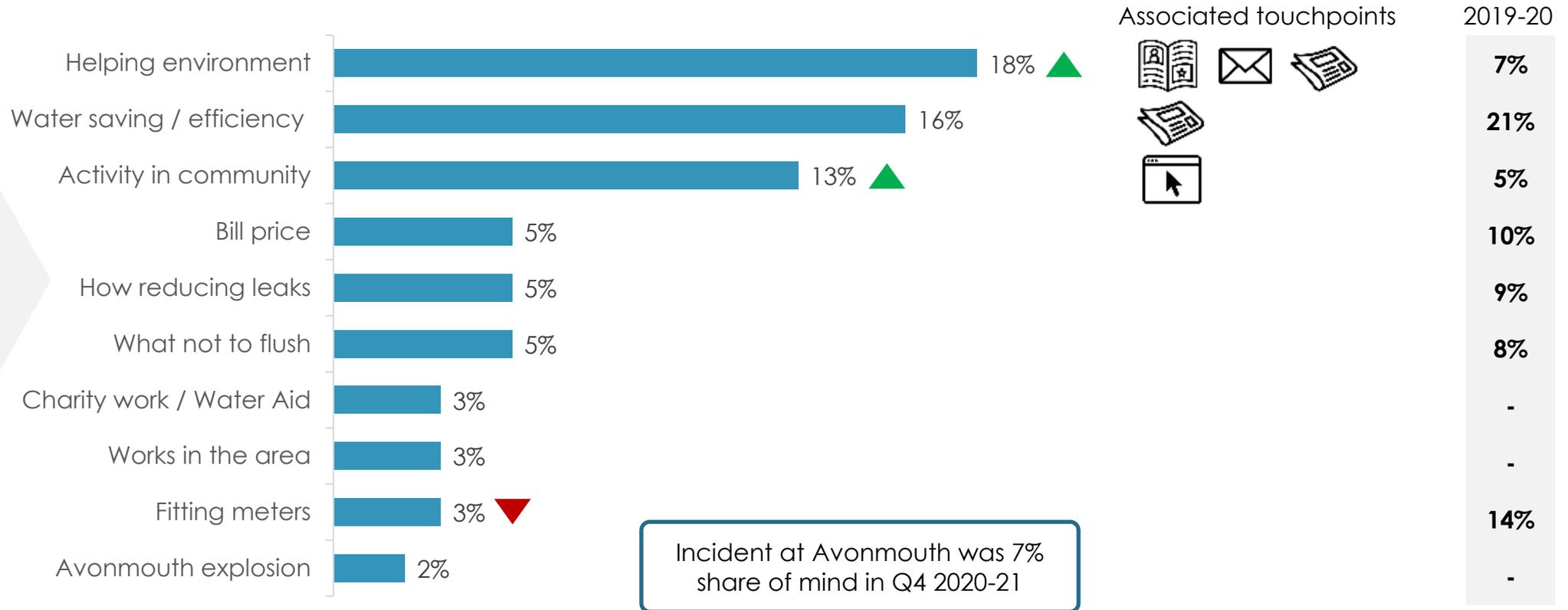
Amongst the minority of customers who could tell us the subject of information seen or heard for Wessex Water, the focus was slightly more on the environment than last year, while water saving / efficiency measures remained a prominent topic. The Avonmouth accident was noted by some in the final Quarter of the year, although not a high share of mind.

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

Base: All 2020-21 who mention anything (289).



Share of mind
Top 10
(% share of all mentions)



Key: ▲ Change since last year Wessex magazine Letter Local paper Website

In the last year 'non core' image associations have faded

Trustworthy

Expert



Panorama feature on sewage leaks was after 2020-21 fieldwork, so will not have influenced results here, but this is a topic to monitor in future.

Environment

'Visible' community actions e.g. education and events had to be halted due to Covid.

Community Role

Amongst the minority of consumers who recall specific messages about Wessex Water, the environment is increasingly a topic they mention. Messages around environmental action may be increasingly important to communicate social purpose, and counter any negative wider publicity.



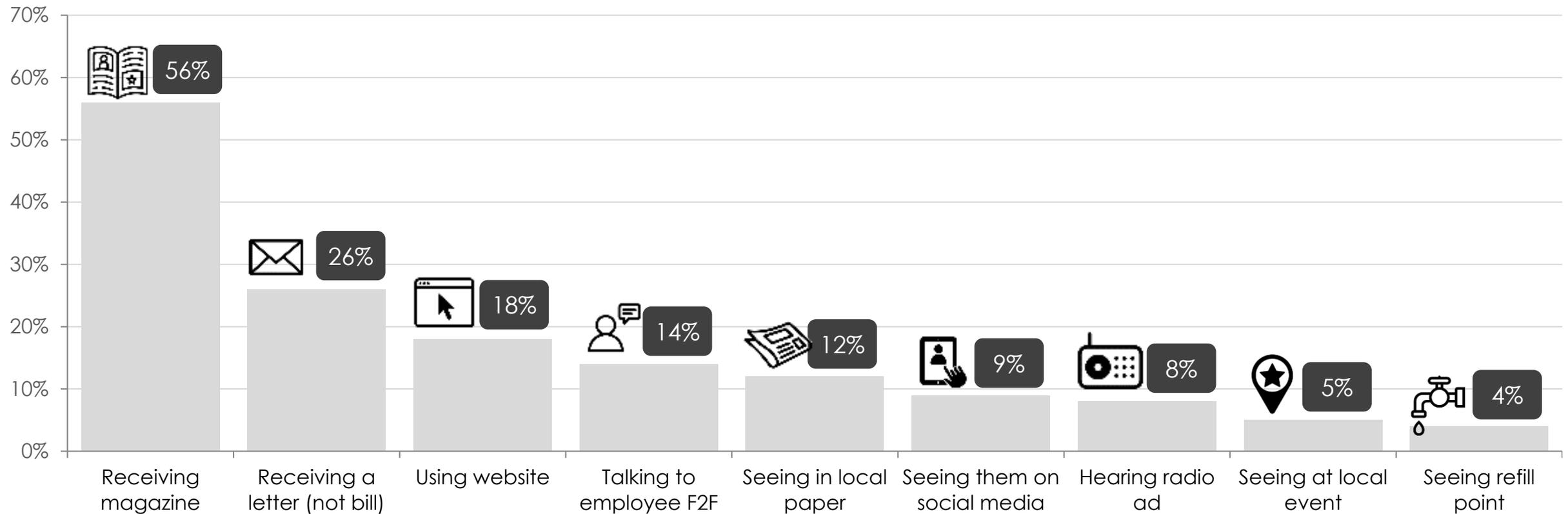
Touchpoints

Prompted recall of touchpoints (2020-21)

By far the most widely recalled touchpoint for Wessex Water (other than receiving the bill) is the Wessex magazine. Encouragingly, nearly 1 in 5 recall visiting the website in the last year – higher numbers than we have seen historically.

Q24ii NEW QUESTION Thinking about Wessex Water, in the last year do you recall...?

Base: All respondents 2020-21 (1,000)

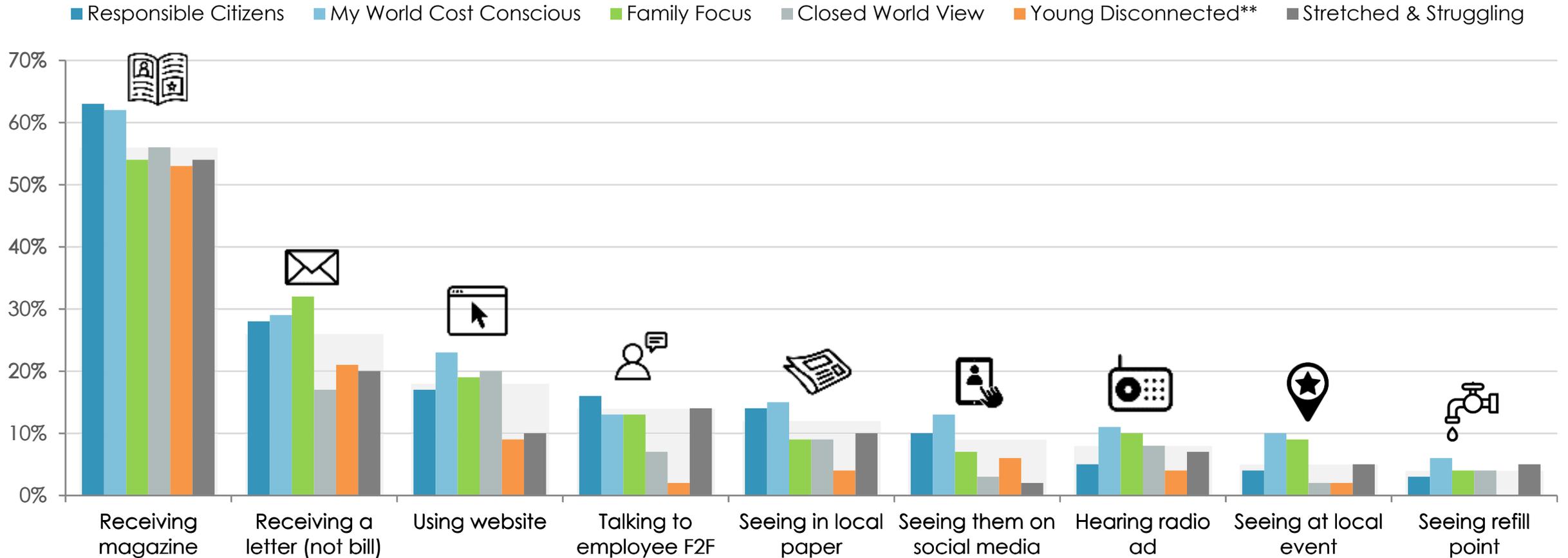


Prompted recall of touchpoints by segment (2020-21)

'Responsible Citizens', 'My World Cost Conscious' and 'Family Focus' recall a slightly wider range of touchpoints than other segments. Talking to employees is more widely recalled amongst 'Stretched and Struggling' than many other touchpoints – personal contact more relevant for them than other channels?

Q24ii NEW QUESTION Thinking about Wessex Water, in the last year do you recall...?

Base: All respondents 2020-21 in each segment



Magazine readership

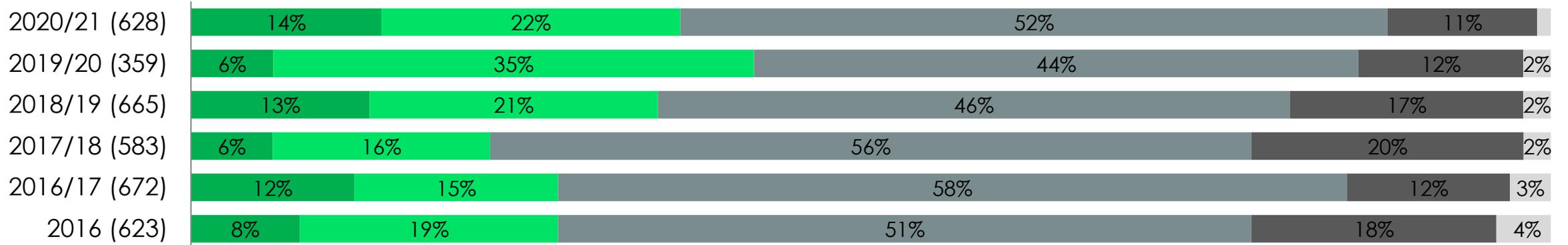
Quality of magazine readership remains consistent with previous years, with nearly 4 in 10 saying they read 'all or most'. The magazine remains an opportunity to get important communications noticed. Content is also rated useful by the majority of those aware.



Q28 How much did you read of Wessex Water magazine?

Base: Those who recalled receiving WW magazine

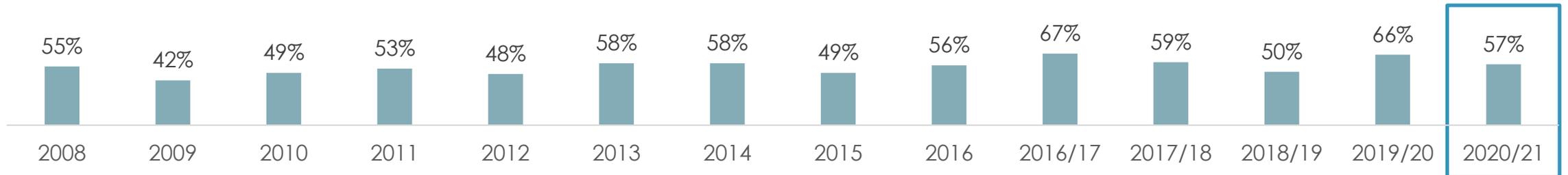
■ All of it ■ Most of it ■ Just flicked through it ■ Did not read any of it ■ Don't know



Q29 Overall how useful did you find Wessex Water magazine?

% very or quite useful

Base: recalled receiving WW magazine, (2020-21: 628)

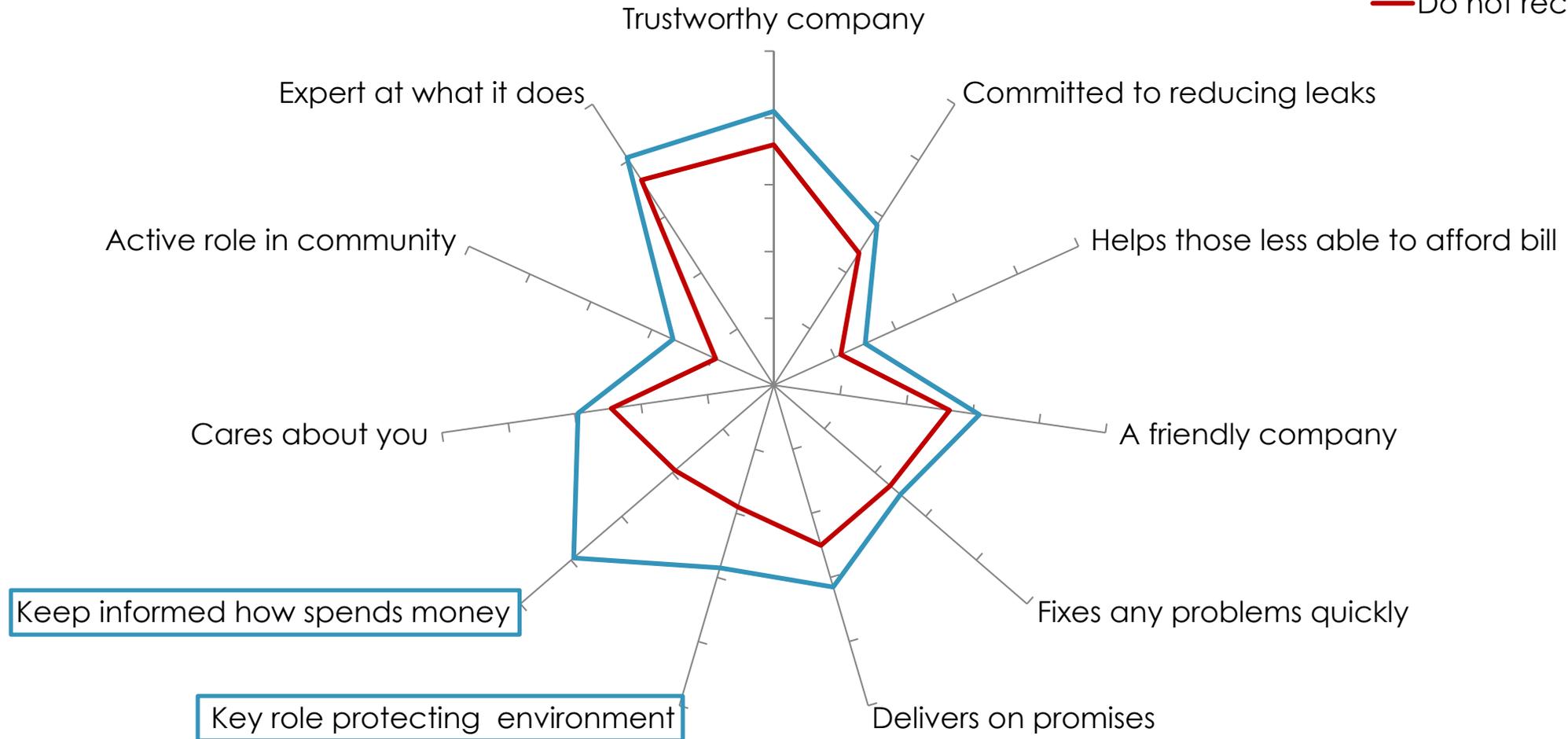


Relationship between magazine recall and imagery (2020-21)

Those who recall the magazine have a richer impression of Wessex Water image – and particularly are more likely to feel Wessex keeps them informed on spending, and also that the company plays a key role in protecting the environment; long-form editorial content may lend itself to effectively conveying these aspects of the brand.



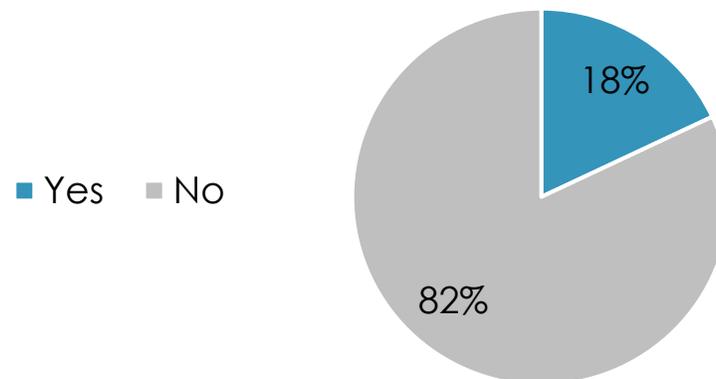
— Recall mag (628)
— Do not recall (372)





Q24 Thinking about Wessex Water, in the last year do you recall using their website?

Base: All respondents (1,000)



Q31 Overall how easy was the website to use?*

Base: All who have used website (147)

■ Very easy ■ Quite easy ■ Neither difficult nor easy ■ Quite difficult ■ Don't know

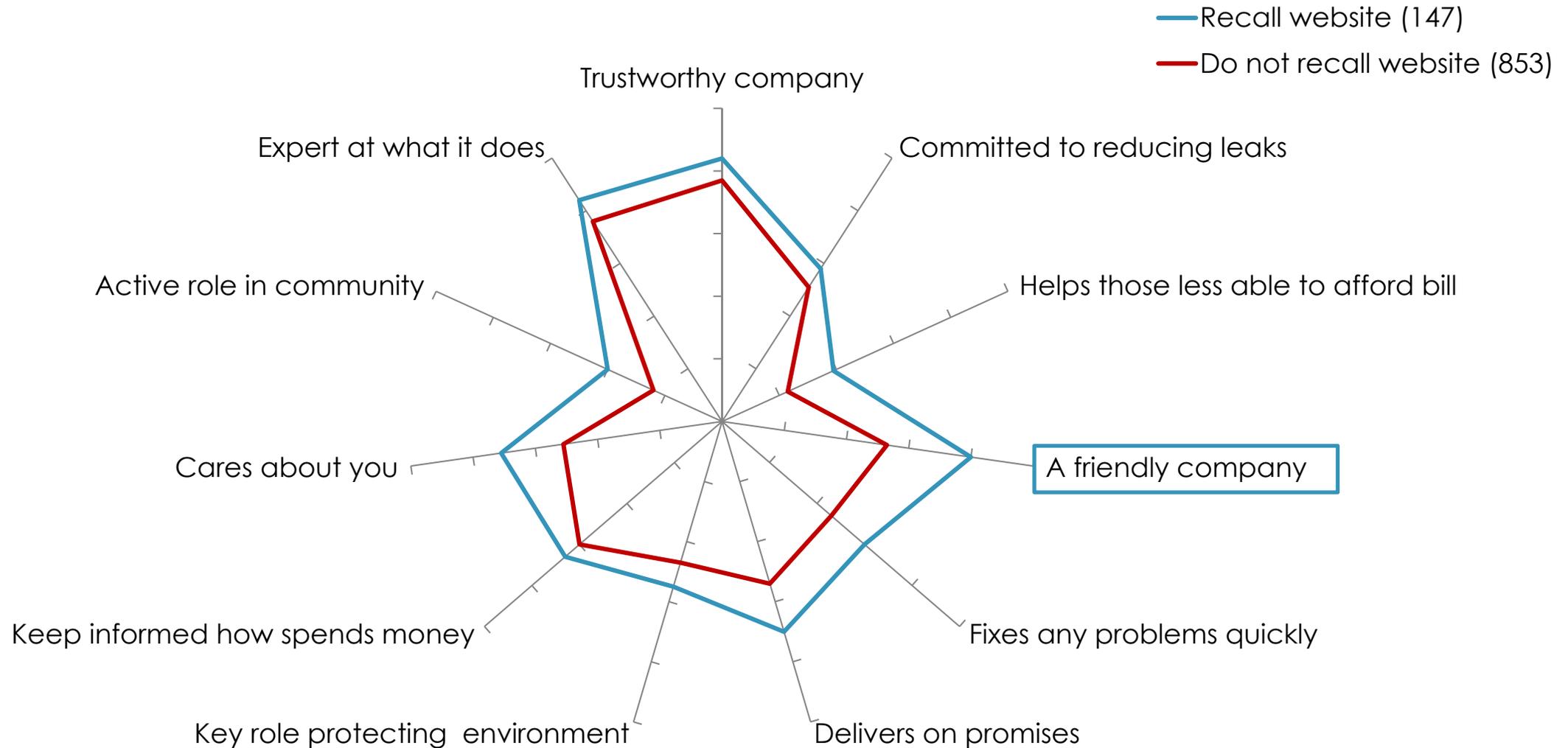


Nearly 1 in 5 customers recall using the website recently – higher claimed levels than we have seen historically. Of those using it, over 50% said it was very easy to use – an encouraging performance as the website becomes a crucial window into Wessex Water activities and services.

*NB: new question for 2020-21

Relationship between recall of using website and imagery (2020-21)

Those who recall using the Wessex website have a richer image of the company than those who don't. Use of the website may convey the more 'human' element of being a friendly company, and there's also evidence it is more associated with responsiveness (e.g. fixes problems quickly).



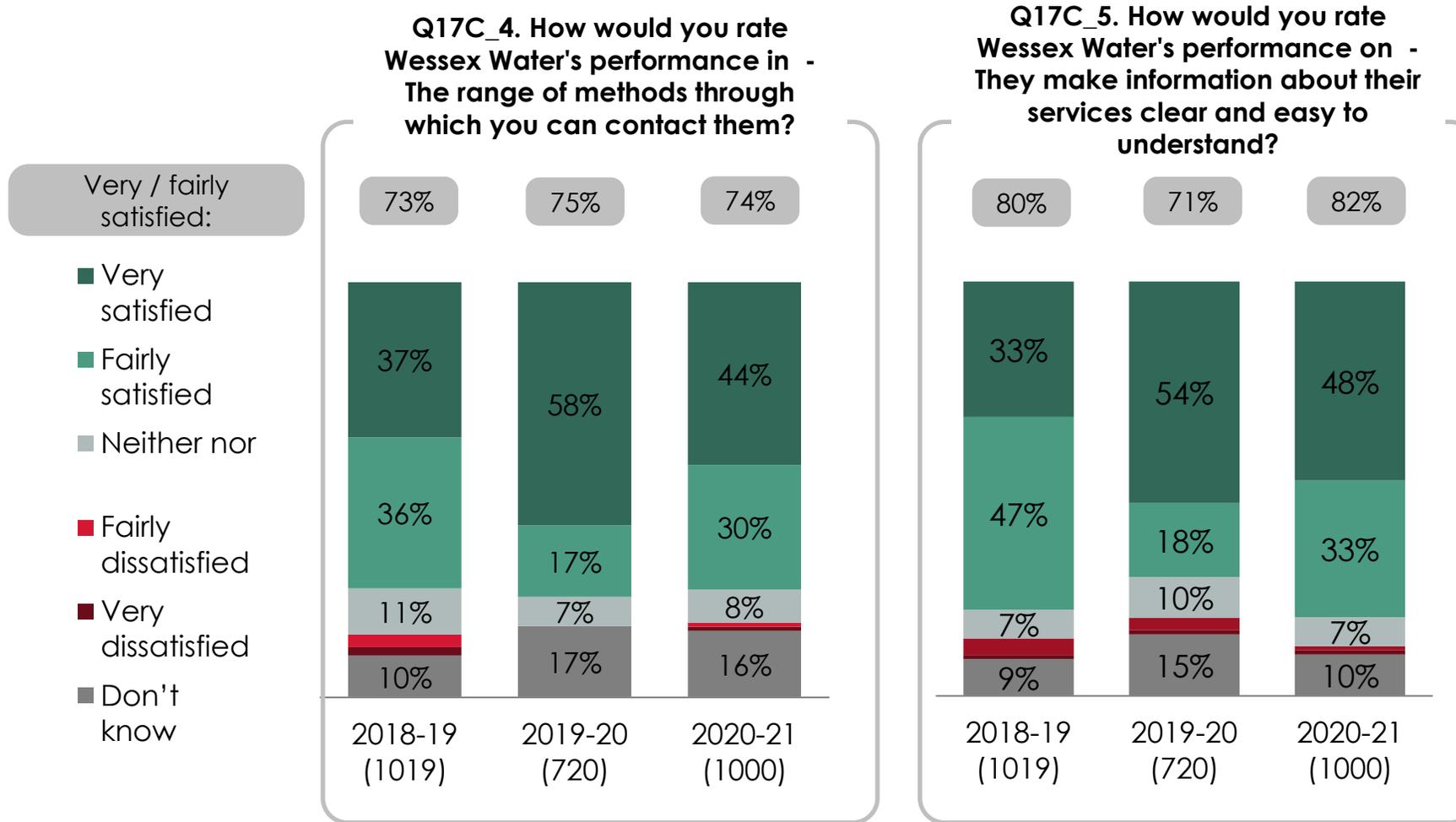


...but
evidence that
digital and
social are
building

...and we note that for the Stretched and Struggling segment, speaking to someone may be more effective / appropriate than digital media as a means of engaging

Ease of access

Most remain broadly happy with accessibility, although around 1 In 7 say they 'don't know' about the methods of contacting Wessex. There's a noticeable improvement this year in 'clear and easy to understand' which correlates with more people claiming to have used the website – is the refreshed site improving impressions of accessibility?



Ease of access combined metric:

78%

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

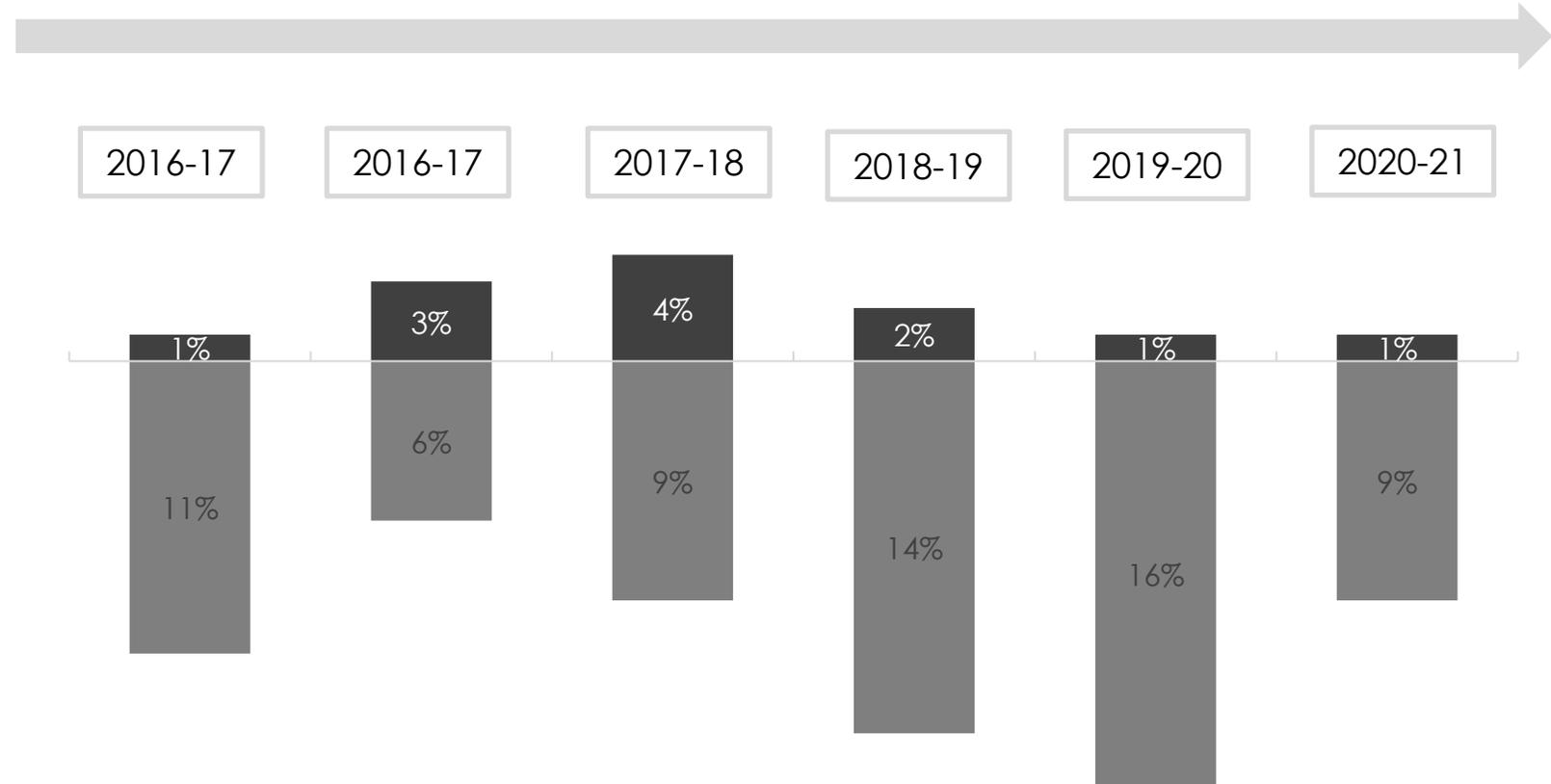
Significantly up from last year (73%)

Base: All respondents

Meeting information needs?

The balance of opinion remains that Wessex provides 'too little' info, although signs that there is less of a dearth of contact this year – could this be down to more (relevant) communications around support in light of Covid-19? Nevertheless, customers would accept more communication, with almost no-one feeling they get 'too much'.

Q26 Overall do you think Wessex Water provide their customers with too little, too much or about the right amount of information? Base: All respondents (2020-21=1,000)



■ Too much

■ Too little

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



Summary

1. As we hope to finally emerge from lockdown, it can be hard to remember the gravity and range of challenges brought by 2020-21

2. Shifting public attitudes to services and utilities: Initial understanding and sympathy, followed by higher expectations. Broadly they are felt to have risen to the occasion

3. Within this dynamic wider context, impressions of Wessex Water remain resilient. To a degree Wessex may be being 'carried with the tide' rather than standing out

4. In a changed landscape, 'Stretched and Struggling' are feeling better about VFM and affordability – but will this be sustained?

5. During the pandemic, simply ensuring reliability & dependability, and efficiently handling issues, has been critical; Non-core functions have faded from view

6. However, looking ahead we anticipate Wessex Water needs to push beyond strong 'business as usual' imagery and communicate facets of a wider agenda

7. The magazine remains Wessex Water's most effective channel, but evidence that digital and social channels are building impact

8. In a world still in flux we will need to monitor evolving underlying needs and priorities to adapt to what consumers need in service and communication



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Appendix – Method

Telephone interviews

The 2020-21 survey is the fifth year with continuous interviewing through the year

Random sample of domestic consumers

Includes both those responsible for paying water bill and in 2020-21 also includes non-bill payers (20% of sample). Quotas for bill payers consistent with previous years on region and age

Data weighted at analysis

Data is weighted to gender, age and area to ensure consistency within each Quarter

Fieldwork April 2020 to March 2021

Q1 interviewing Apr – June '20 (n=250)
Q2 interviewing July – Sept '20 (n=250)
Q3 interviewing Oct – Dec '20 (n=250)
Q4 interviewing Jan – Mar '21 (n=250)

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	$\pm 8.3\%$	$\pm 12.7\%$	$\pm 13.9\%$

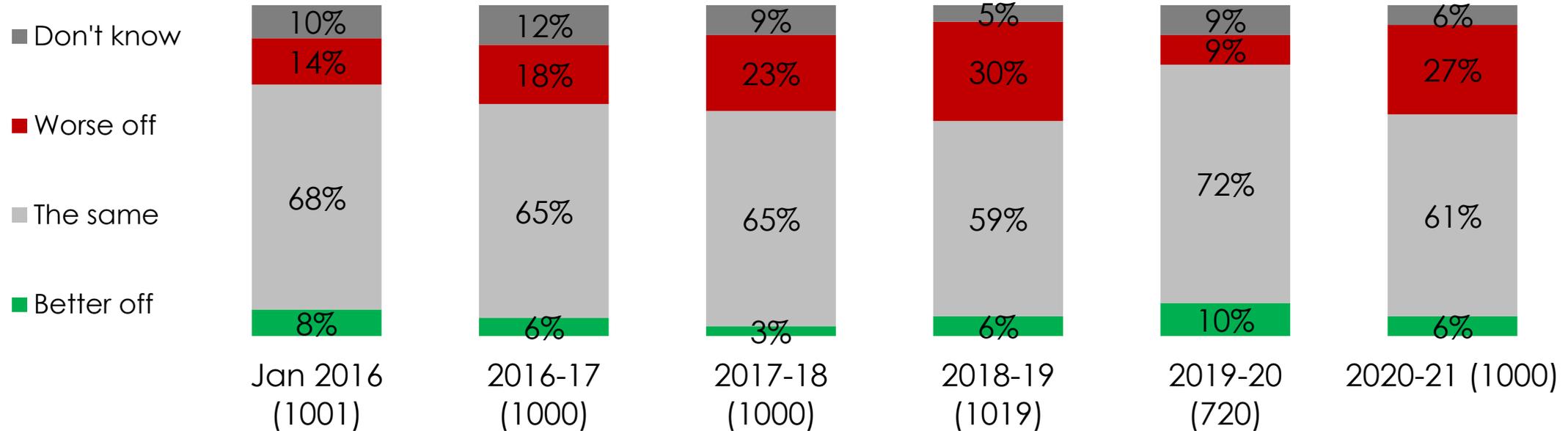
- Note that we highlight very small sample sizes (under 50) using '**'. These percentages are indicative only, with caution needed for interpretation
- In some cases actual counts rather than %s are quoted, where sample sizes are too small to be viable to be expressed as %s
- Note that 'net' is used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



Appendix – Wider Context

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.

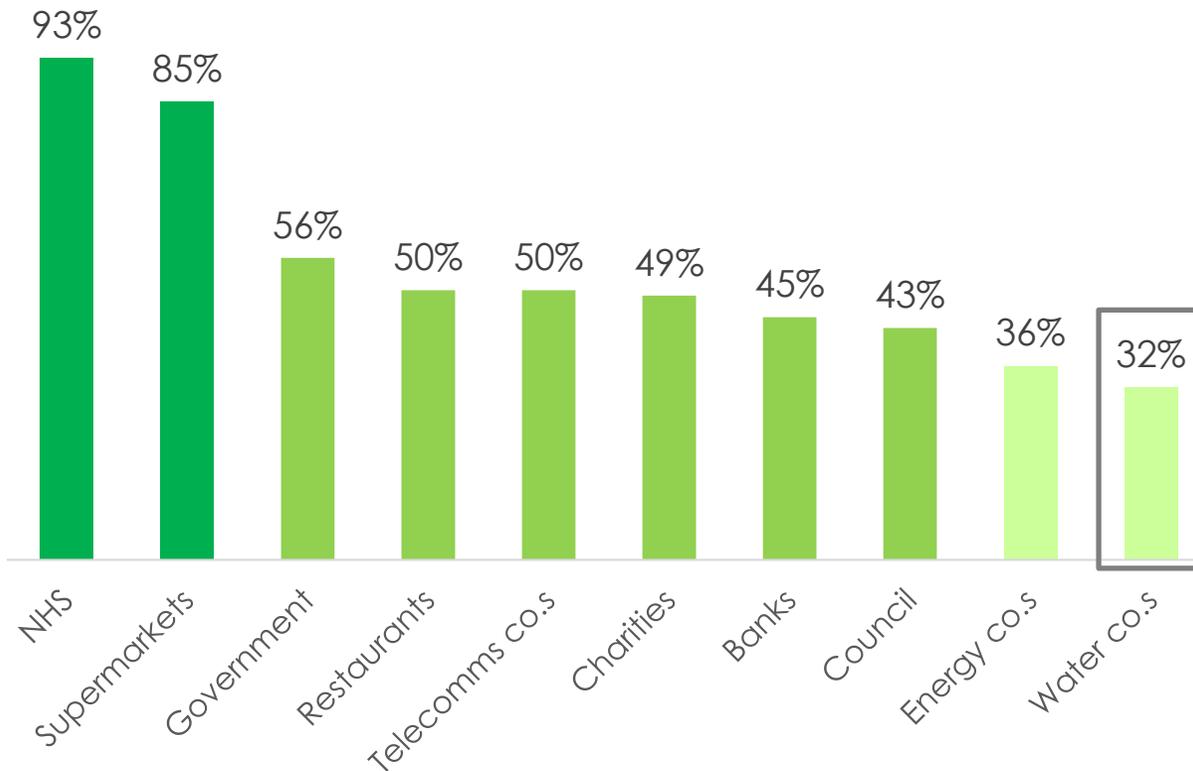
Q11 Do you expect your household to be better off, worse off or about the same in the next 12 months? Base: All



The changing consumer perspective – May 2020

- Our nationwide data from early May 2020 shows how water companies, in the early stages after the Covid-19 lockdown, were more 'recessive' than organisations in other sectors, and also 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.

Post-Covid impact on segment sizes

% of Wessex Water customers in each segment

Segment	Pre Covid (2018-19 & 2019-20)	Post Covid (2020-21)
Responsible Citizens	34%	27%
My World Cost Conscious	22%	26%
Family Focus	20%	18%
Closed World View	8%	11%
Young Disconnected**	3%	4%
Stretched and Struggling	11%	14%



Responsible Citizens

34%

27%



Responsible Citizen segment shrank the most. Less confidence about paying bills and being less (able to be) involved in community meaning some individuals shifted to other segments



My World Cost Conscious

22%

26%



Meanwhile My World Cost Conscious segment grew the most – reinforcing the idea that some Responsible Citizens have become less confident about bills



Family Focus

20%

18%



Closed World View

8%

11%



Young Disconnected**

3%

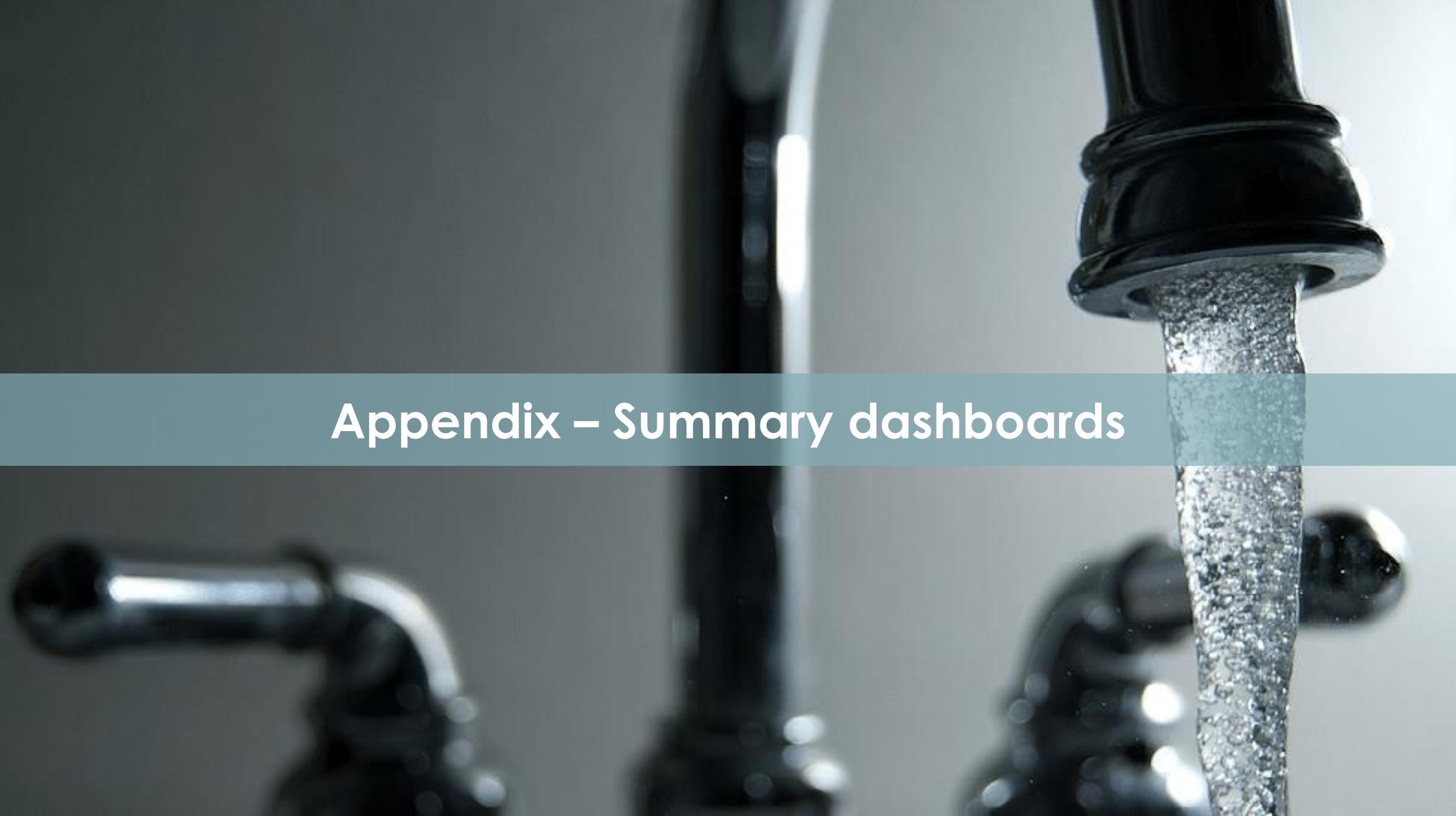
4%



Stretched and Struggling

11%

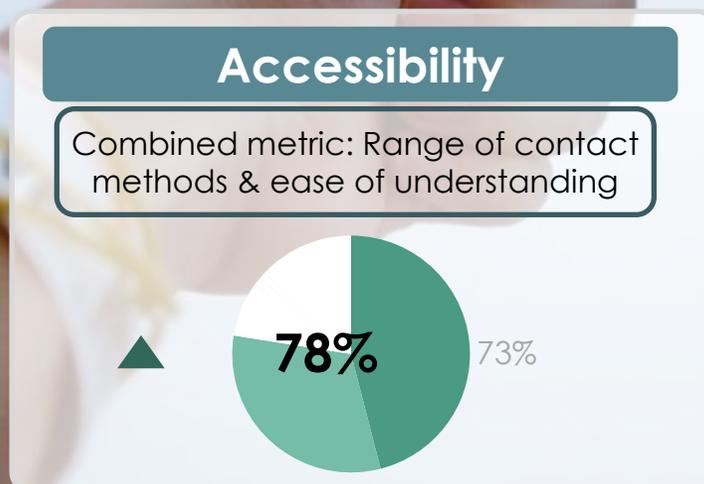
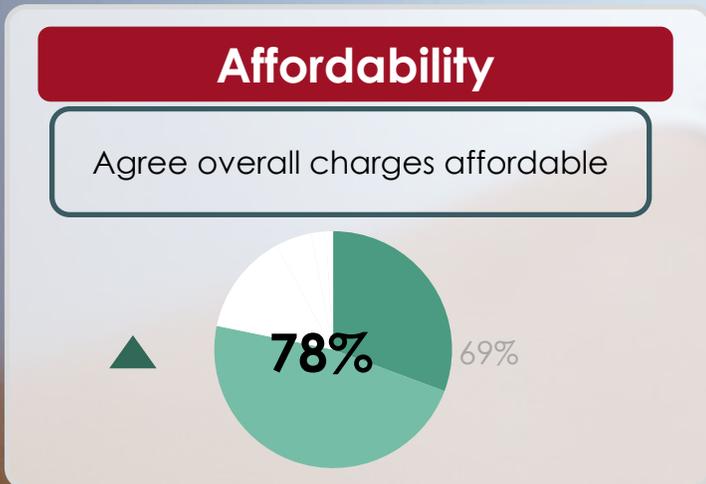
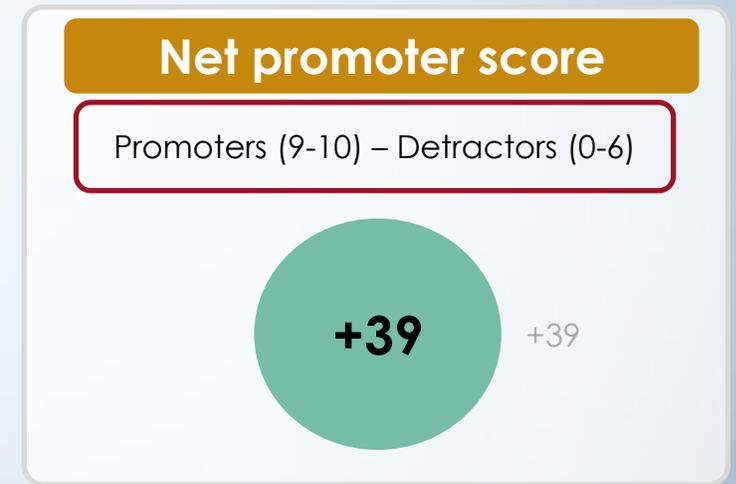
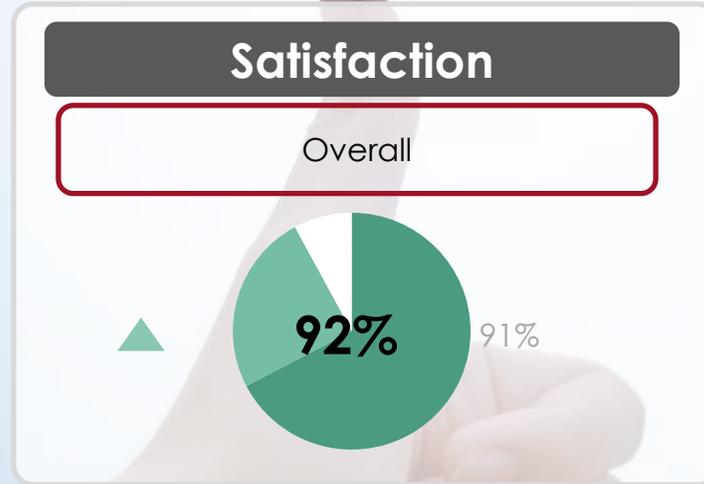
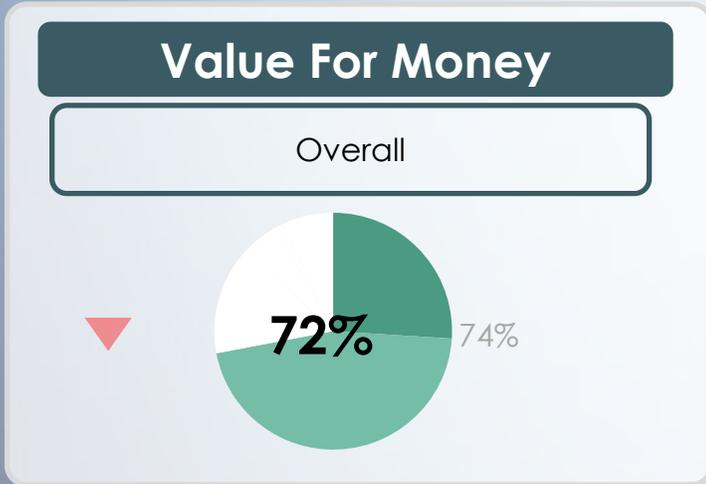
14%



Appendix – Summary dashboards

Headline Dashboard 2020-21

- In spite of the challenges presented by COVID-19, satisfaction and the net promoter score remain resilient
- VFM falls slightly since last year, but only a directional change (not significant)
- Affordability and accessibility have improved since last year



Key

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

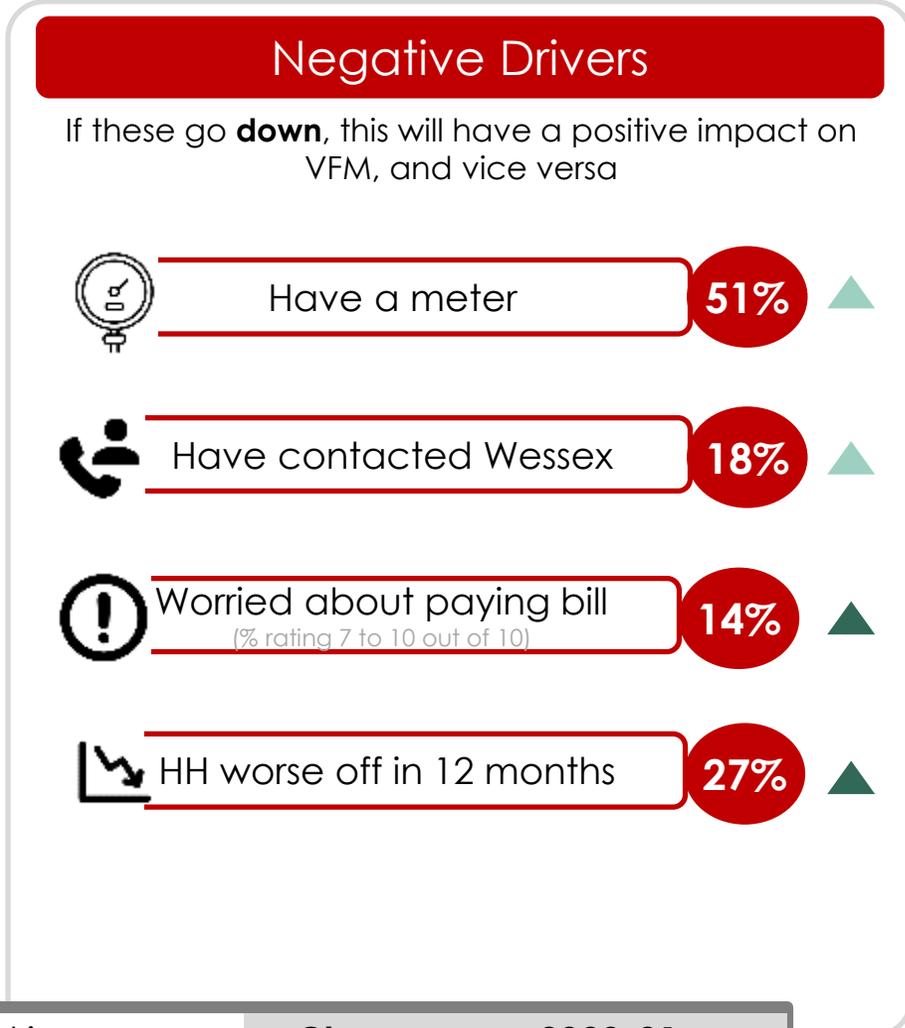
xx% = previous year

Base for headline measures is total sample (n=1000 for 2020-21)

Key Drivers of VFM (2020-21 vs 2019-20)

In 2020-21 there have been contradictory forces on how people feel about Wessex Water, household finances and bills. Positive movement in satisfaction with billing and in Wessex Water informing about spend are offset by greater underlying anxiety both about the bill and about household fortunes in general.

* Wording change in 2020-21 may have influenced result



Key: ▲ Significant increase ▲ Directional increase
 ▼ Significant decrease ▼ Directional decrease

Changes are 2020-21 vs. 2019-20

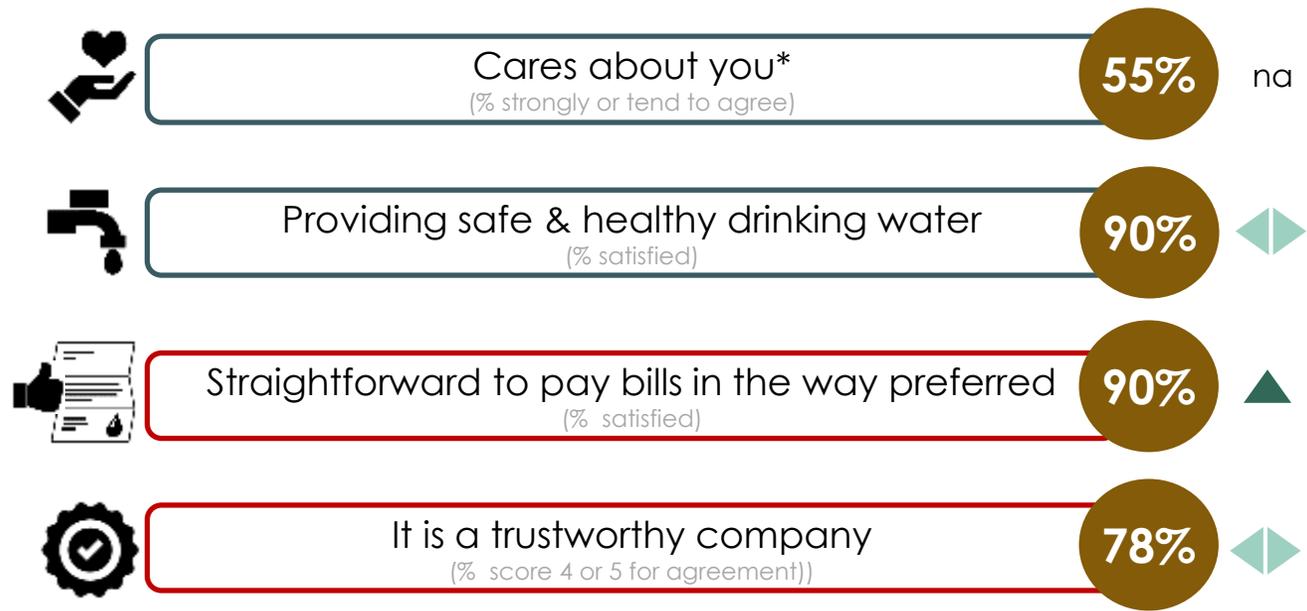
Key Drivers of Net Promoter Score

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. Most of these measures remain strong this year (although we are unable to directly compare 'cares for'), sustaining the NPS at the same level as last year.

Positive Drivers – Net Promoter Score

If these go **up**, this will have a positive impact on NPS

* Wording change in 2020-21 may have influenced result



Key: ▲ Significant increase ▲ Directional increase
 ▼ Significant decrease ▼ Directional decrease

Changes are 2020-21 versus previous year



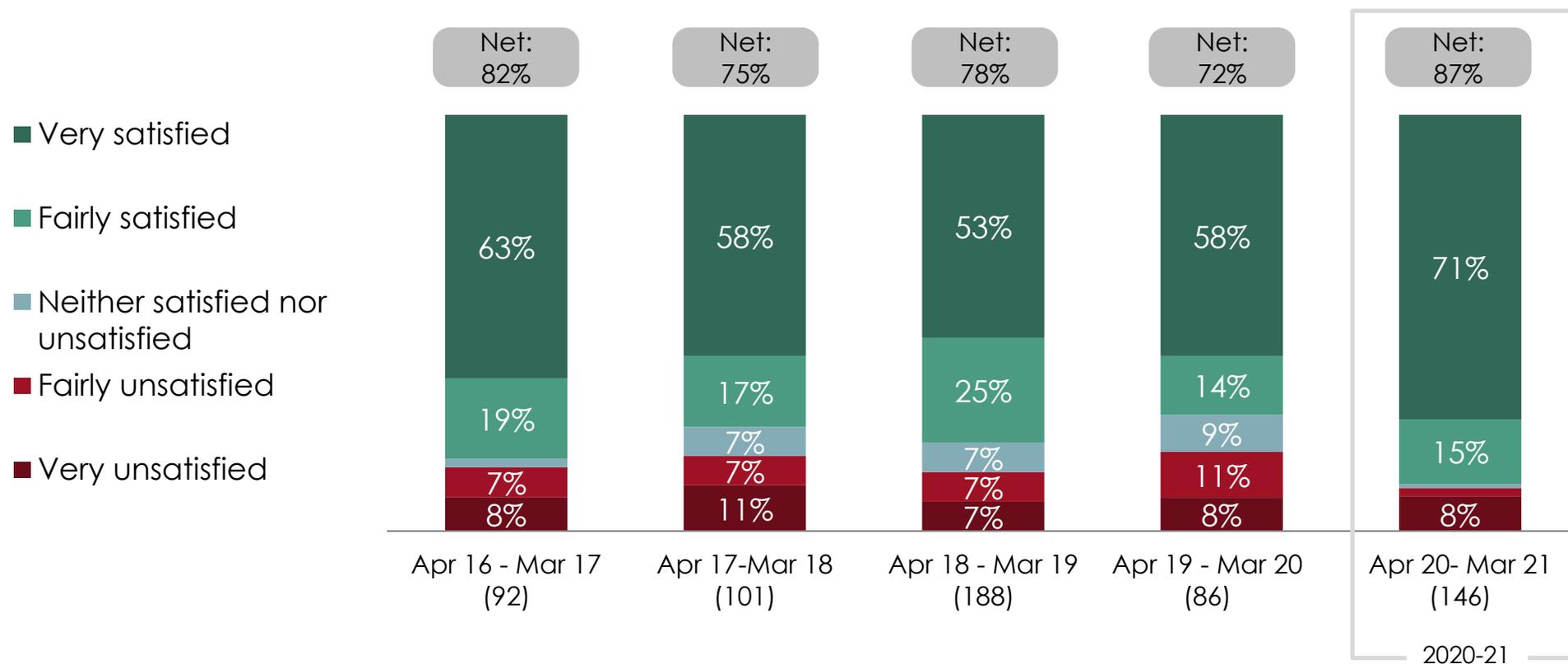
Appendix – Contact and queries

Satisfaction – dealing with queries

Amongst the minority of consumers who have been in contact with Wessex Water, the great majority are satisfied with how their query was handled. While base sizes are small, there are signs that this has improved during the pandemic.

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

(Base: Wessex solus customers and all Bristol and Bournemouth customers contacting Wessex about anything other than water supply)



CAUTION! LOW BASE SIZES

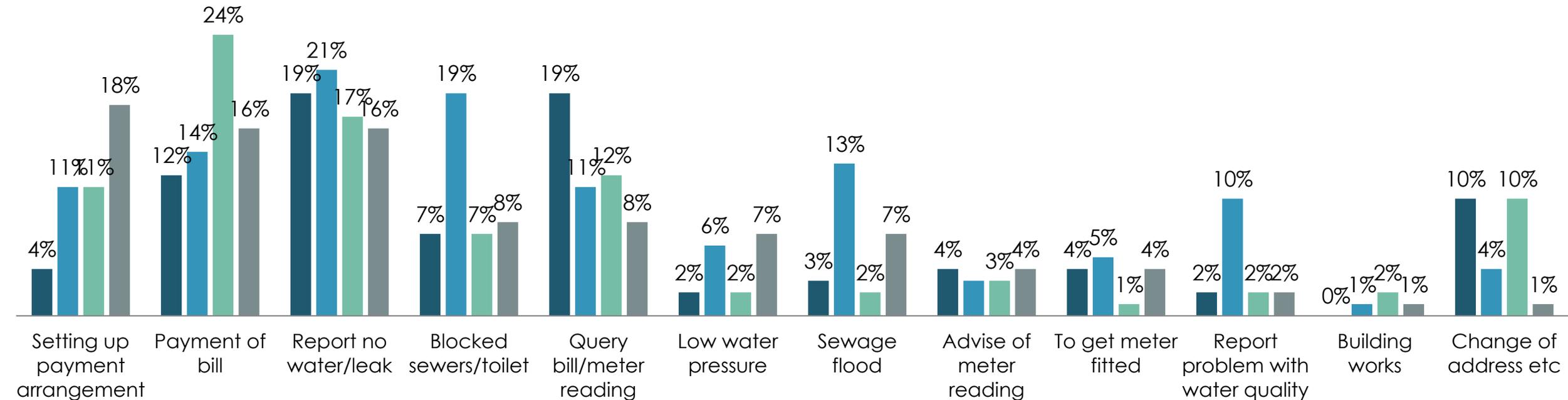
Reasons for contact

Amongst our sample who have contacted Wessex Water in the last year, there appears to be a higher incidence of querying bill / meter readings than previous years, and fewer setting up payment arrangements (as it is likely fewer people are moving house during lockdown)

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

Base: Contacted Wessex with a query relevant to Wessex

■ 2020-21 (164) ■ 2019-20 (86) ■ 2018-19 (188) ■ 2017-18 (101)

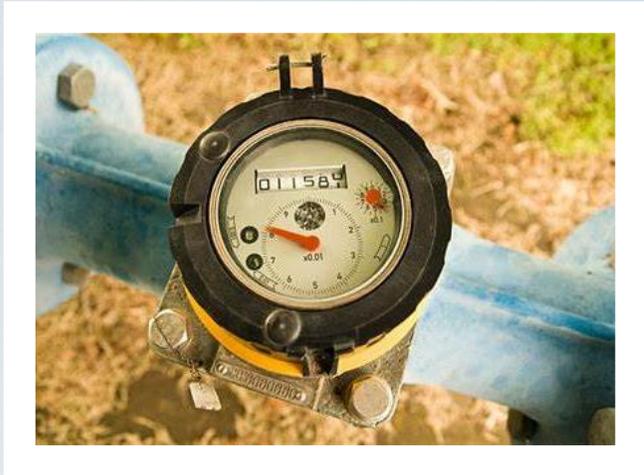




Appendix – Spotlight on...

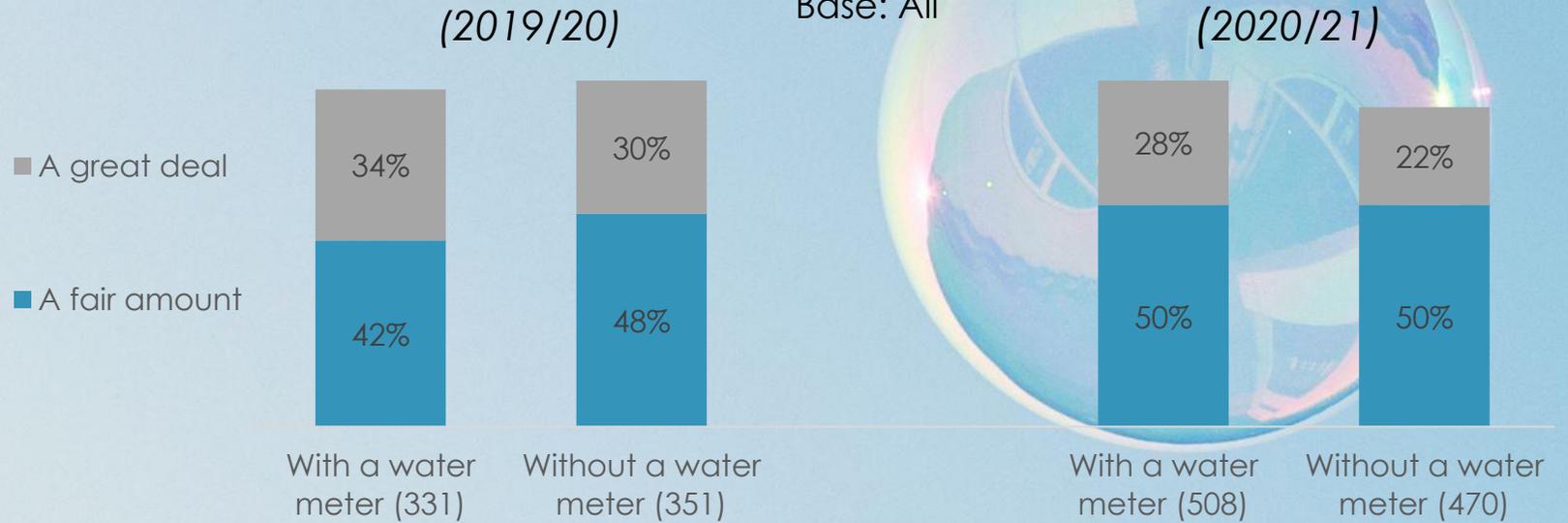
Metering and water use

Indications that those with a water meter are slightly more likely than those without a meter to make 'a great deal of effort to save water' – is this related to efforts to reduce the bill? This is an area we will look to explore in the tracking survey for 2020-21. On average, those with meters also estimate their bill is slightly lower.



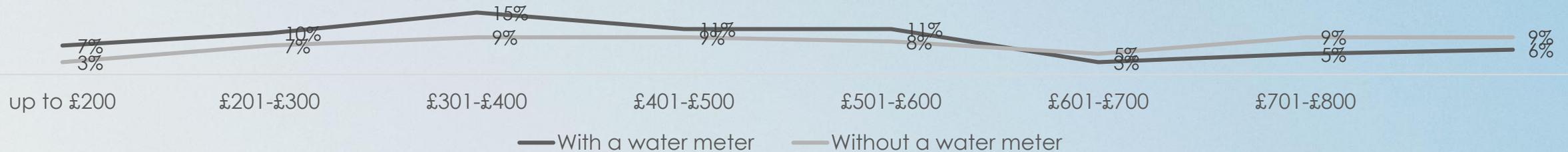
(QF1a) How much of an effort do you make at home to save water?

Base: All



Q20 - Roughly how much do you think you currently pay, combining your water supply and sewerage service?

Base: All bill payers 2020-21



Wessex Water imagery by segment 2020-21

Indications that My World Cost Conscious actively feel that Wessex Water is caring for them, and actively helping those less able to afford. Meanwhile Stretched and Struggling do not have this strength of association – is it possible to engage with them more in future in these areas?

	TOTAL (1739)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84)	Young Disconnected (34*)	Stretched & Struggling (112)
Expert	78%	77%	76%	76%	75%	85%	72%
Trustworthy	78%	78%	80%	80%	66%	83%	74%
Delivers on promises	57%	60%	60%	62%	45%	60%	45%
Key role in protecting the environment	49%	51%	56%	40%	35%	38%	53%
Cares about you	55%	50%	63%	55%	48%	40%	50%
Fixes problems quickly	48%	46%	53%	52%	26%	35%	43%
Keeps informed about how it spends money	61%	69%	64%	56%	62%	69%	55%
Active role in community	27%	23%	28%	30%	16%	16%	32%
A friendly company	58%	60%	64%	61%	53%	41%	50%
Helps those less able to afford	26%	18%	41%	30%	15%	29%	24%
Committed to reducing leaks	53%	54%	57%	54%	36%	38%	53%

ABOVE AVERAGE SCORE

AVERAGE SCORE

BELOW AVERAGE SCORE

KEY: * Caution low base size ** Caution very low base size. Figures are % agree with statements about Wessex.

Bill payers versus non-bill payers: Awareness and attitudes

	Total (1,000)	Bill payers (815)	Non bill payers (185)
Spontaneous <i>DON'T KNOW</i> who provides water	14%	11%	25%
Spontaneous awareness Wessex provides sewerage service	61%	65%	44%
Satisfied	92%	93%	88%
Image statements Non-bill payers slightly lower for 'informed about spend'; 'helps those less able to afford'			
NPS	+39	+40	+35
VFM	72%	73%	68%
Seen on social media	9%	8%	14%
Used website	18%	18%	20%
Seen magazine	56%	59%	46%
Contact?	18%	19%	13%
Aware of bill assistance	30%	33%	20%
Aware PSR	41%	43%	32%
A great deal of effort to be environmentally friendly	31%	30%	36%

Bill payers versus non-bill payers: Demographics

	Total (1,000)	Bill payers (815)	Non bill payers (185)
ABC1	58%	60%	50%
C2DE	41%	39%	49%
One person in HH	17%	19%	9%
16-34 years old	31%	27%	47%
35-54	31%	33%	24%
55+	34%	37%	24%

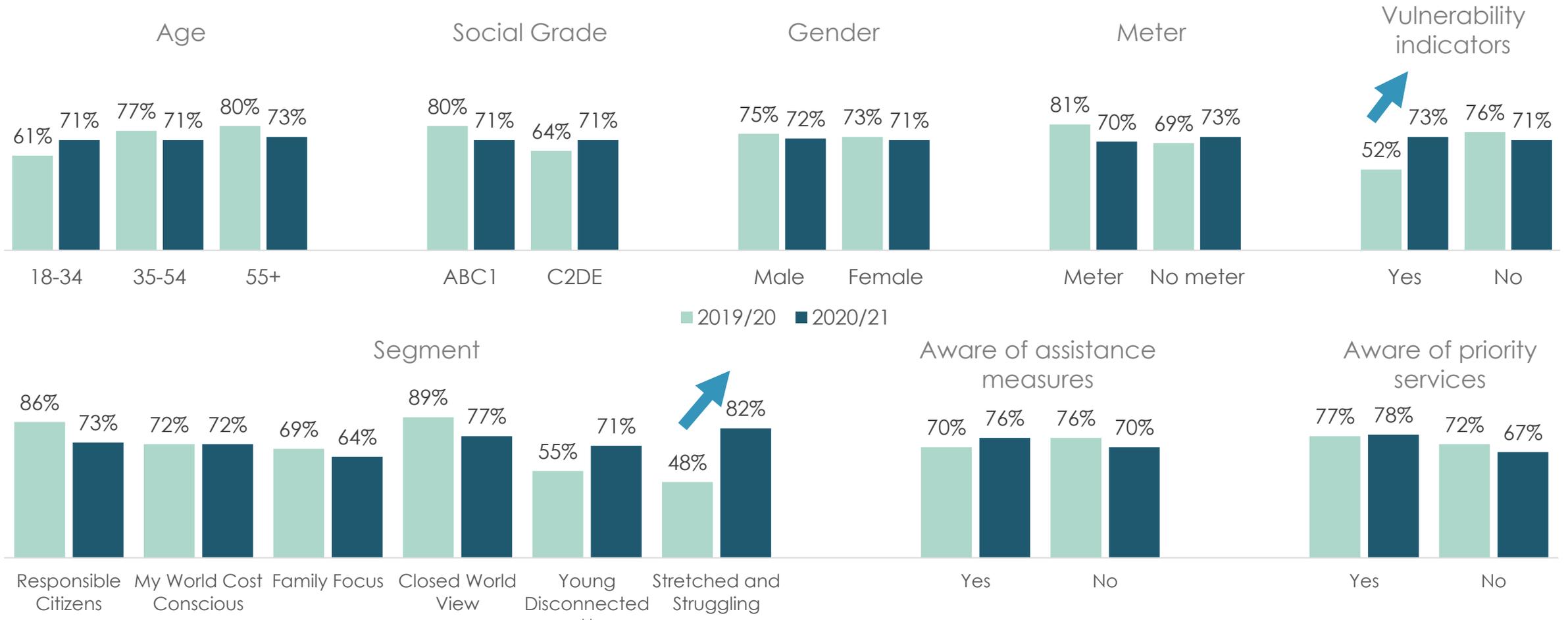
A close-up photograph of a fountain pen nib, showing the intricate details of the writing tip. The nib is dark, possibly black or dark blue, and is set against a light, neutral background. A semi-transparent teal horizontal band is overlaid across the middle of the image, containing the text "Appendix - Additional detail" in white. The nib's tip is the central focus, showing the fine lines and the texture of the metal. The background is softly blurred, highlighting the sharp details of the nib.

Appendix - Additional detail

Overall VFM by key groups – versus last year only

Since last year there has been an equalisation of VFM ratings across different groups – improving notably for ‘Stretched and Struggling’ segment, vulnerable and younger consumers. Various support initiatives (both by Wessex and more broadly) in response to Covid-19 may have played a part.

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 / 2020-21

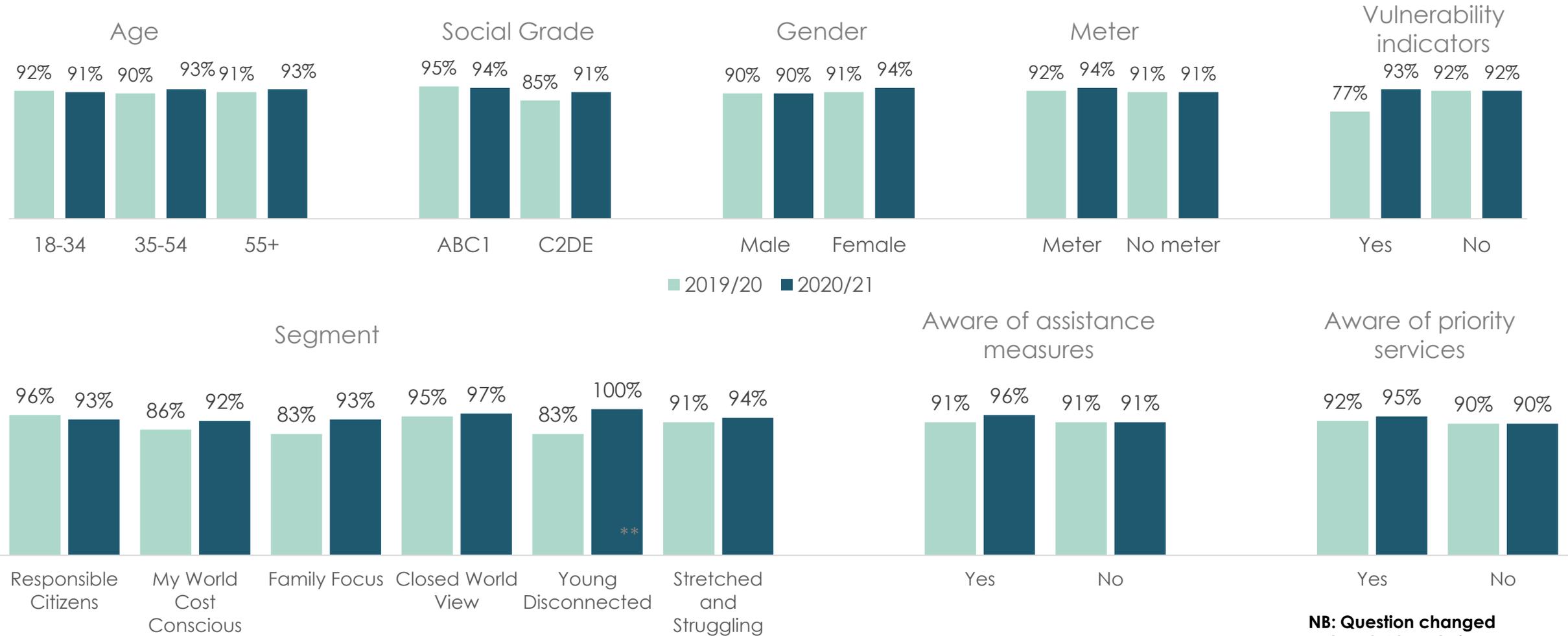


* CAUTION Low sample size (<80); **CAUTION Very low sample size (<50). Data is indicative only

Overall satisfaction by key groups – versus last year only

The key group notably lagging behind for satisfaction last year was those with potential vulnerabilities. Post Covid-19 this group have now caught up with the rest – is this related to Wessex Water actively responding to needs of those who require added support?

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, 2020-21)



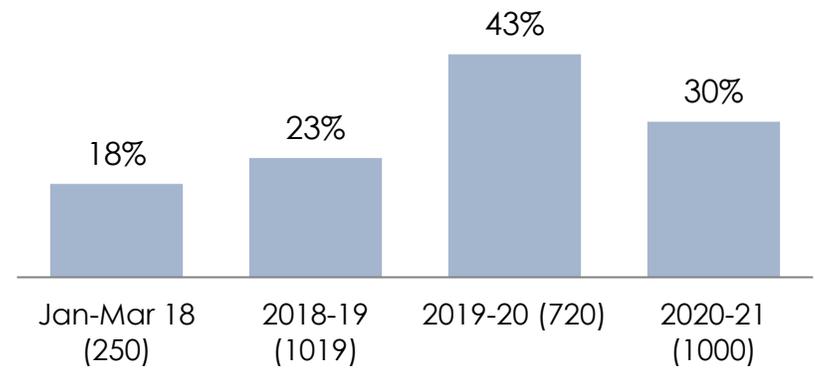
** CAUTION Low sample sizes (<80) – indicative only

NB: Question changed to a 0-10 scale in 2020-21

Awareness of Assistance Measures – by year

Immediately post-Covid there was a dip in awareness of Wessex Water’s financial assistance measures – these may have been overshadowed by other new high profile Covid-related support (e.g. furlough). Meanwhile awareness of other (priority) services from Wessex have held up well.

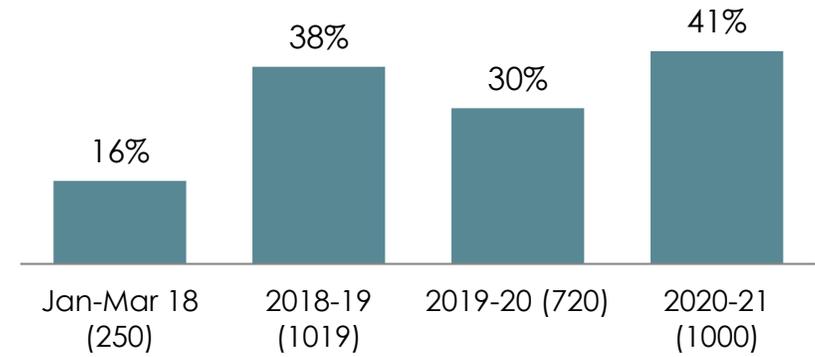
QF10 Are you aware of any kind of assistance that Wessex Water offers for customers **who struggle to afford their water bill**? (Base: all respondents)



30%
Aware for 2020-21
(33% of bill payers)

- Higher amongst:**
- Responsible Citizens (38%)

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

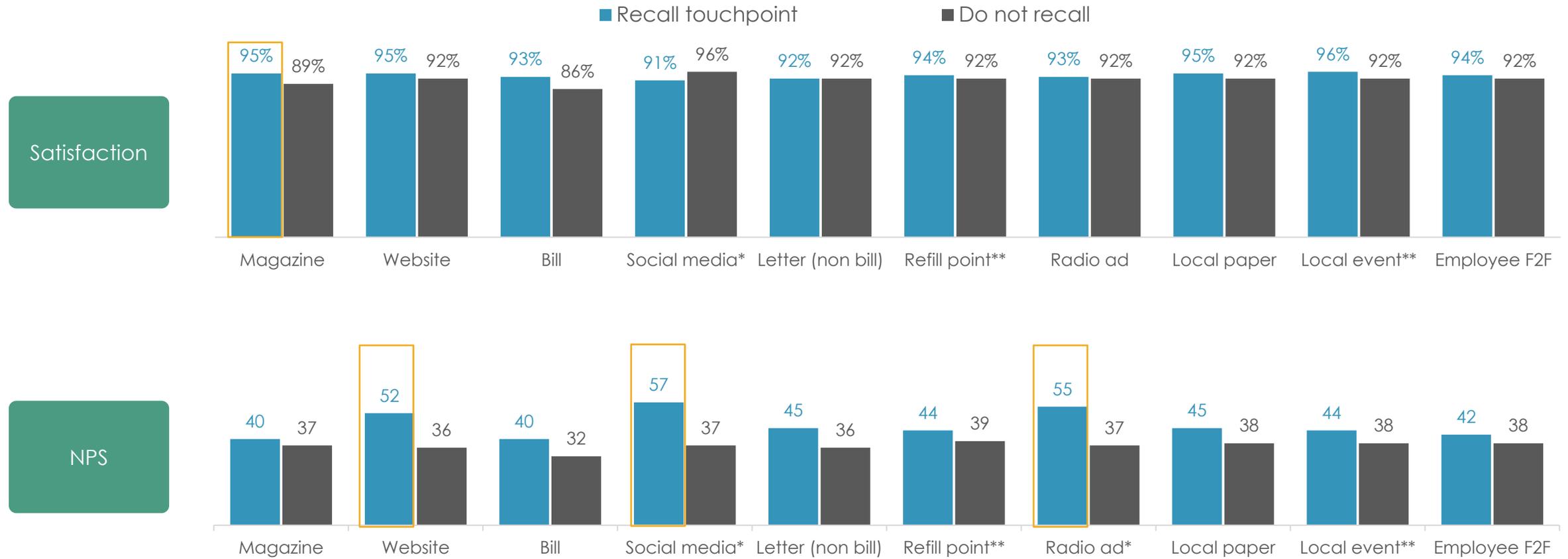


41%
Aware for 2020-21
(43% of bill payers)

- Higher amongst:**
- Those who recall Wessex Water social media (60%) and magazine (50%)
 - Family Focus (49%)
 - My World Cost Conscious (47%)

Relationship between channel recall and satisfaction, NPS (2020-21)

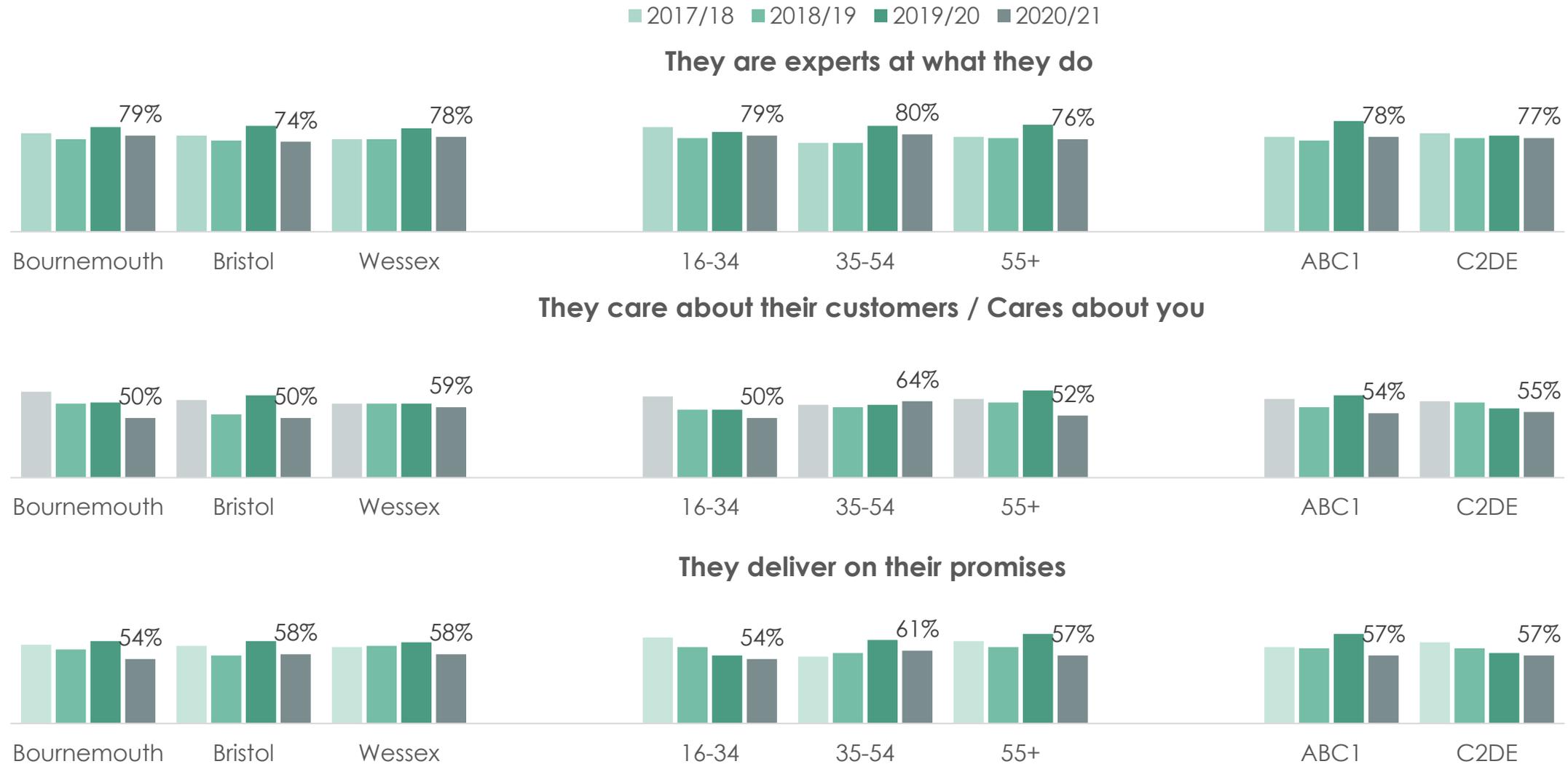
Underlying satisfaction is high, regardless of which touchpoints are recalled. NPS is a more highly variable measure - significantly higher amongst those who recall Wessex Water on social media, on the radio, or who have used the website (are these channels acting as more effective brand 'halo'?)



Base sizes (Recall / Don't recall): Magazine (628/372); Website (147/853); Bill (901/99); Social media (76*/924); Letter (non bill) (268/732); Refill point (44**/946); Radio ad (74/926) / Local paper (129/871) / Local event (54*/946) / Talk to employee (147 / 853) KEY: * Caution low base size ** Caution very low base size

Components of Trust

'Expert' remains a strong impression of Wessex Water across all sub groups. The wording change in the statement about 'care' coincides with a drop in endorsement for most subgroups.





Appendix – Communications images

FOR YOU. FOR LIFE.

Flight of the Birdgirl

Mya-Rose Craig, conservationist and campaigner - page 5



Meet our people
Keeping your water top quality - pages 6 to 7

Meet Drop and Plop

Activities for children - pages 8 and 9



Back to school

Book a virtual session with us - page 20

Wessex Water Foundation

Supporting communities in your area - pages 14 to 18

The flight of the Birdgirl



Black2Nature is one of the many local charities supported by the Wessex Water Foundation. Founder Mya-Rose Craig explains why she set up the charity and how funding will support young people to reconnect with nature following the Covid-19 pandemic.

As an 18-year-old British Bangladeshi birder and conservationist, I have experienced first-hand the lack of diversity of people enjoying green spaces around me. Lockdown has highlighted and reinforced how important it is for us as humans to get outside into nature and green spaces. The consequences of staying cooped up indoors can have terrible detrimental effects on our mental and physical health.

I founded the charity Black2nature in 2016 to tackle the lack of ethnic diversity in the nature sector and to also give opportunities to inner-city children and young people particularly from VME communities to engage with nature. It is important to have people from all communities enjoying natural spaces to promote community cohesion and so that everyone can use connecting with nature to benefit their mental health.

Black2Nature runs one-day primary age and two-day

Not being able to get outside and into nature has a particularly big impact on teenagers, as we are used to going to school, seeing lots of friends and socialising in big groups. I have been on a gap year since the end of April 2020, with almost all my friends going away to university. I have been busy working and writing a book, but I have had almost no contact with other people my age. I have managed to survive because I have been able to fall back on birding and nature to keep me well.

Visible Minority Ethnic (VME) people suffer much higher incidences of mental illness, with those incidences being much more serious and more likely to have been diagnosed within the criminal justice system. There is very little research on the subject as to why this is happening except that it is thought that the pressures of living dual lives, coping with racism and mental health stigma are contributing factors. The statistics are appalling, with 60% of those admitted into mental health hospital wards being VME whilst the national average of the population that is VME is 14%.

Maintaining essential services



It's been a year of adaptation and change, but we've made sure you have everything you need to drink, wash, cook and clean as we continue to keep water and sewerage services running as normal. You may have seen our teams out and about over the past few months fixing leaks and clearing sewer blockages, as well as working on key construction projects to make sure your essential services are maintained. All of which has been done in a safe way and in line with the government's advice to keep you supplied with safe, high-quality drinking water and reliable sewerage services, while protecting our colleagues and the public. Our dedicated teams have also continued to support customers through our Priority Services Register (PSR) which ensured anyone who requires an extra helping hand had the support they needed. And with people spending more time at home, we've been helping our customers manage their water usage and the cost of their bills by regularly taking meter readings so we can provide support at the earliest opportunity. There's no doubt that it's been an uncertain time and we realise that many people have been worried about what the future holds for their finances. Whether it's short term or long term help you need, we'll always be here to make sure you have the support you require.

Support for you... during challenging times

We know life can be unpredictable, it's why we offer a range of support, from alternative payment arrangements through to our affordability plans, to best fit your personal circumstances. If you've been unable to work during the pandemic and your finances have been affected, perhaps due to redundancy or being self-employed, we can also help by lowering your bill until you're back on track. Get in touch today and find out more about the support we offer, visit wessexwater.co.uk/helptoday or call our friendly team on 03-45 600 3 600 (Monday to Friday 9am to 8pm, Saturday 9am to 2pm).

WELCOME

Welcome to the latest edition of our magazine. Thanks for joining us as we delve into how we spot leaks and keep the water supply going. We meet Abbie, one of our water quality inspectors, who ensures your drinking water meets the highest possible standards. To help us stay safe and fight coronavirus we have all been using more single-use plastics from gloves to masks. This year we are helping communities to make a commitment to change from single-use plastics by moving to refill our bottles. We have been working with local councils across our region to install water refill points to reduce the use of single-use plastic water bottles. The Wessex Water Foundation has supported many projects including Black2Nature. In the magazine the Founder, Mya-Rose Craig, explains why she set up the charity and how funding will support young people to reconnect with nature following the Covid-19 pandemic. You can read more about some of the other great people and projects the 2021 recovery fund supported on pages 14 to 18. As life is starting to get back to normal and restrictions ease, children returning to the classroom could benefit from their educational offering. From 19 April we will start welcoming schools and other groups to visit our water and sewerage treatment works. We also offer virtual sessions on Zoom on Microsoft Teams. Children can learn all about what we do in the classroom. To book a visit or virtual session visit wessexwater.co.uk/education. We'll see you in Issue 9: Pip and Drop who make learning about the amazing world of water fun - see pages 8 and 9. There's lots more to read. Find out how we are working smarter, committed to achieving net zero carbon emissions from our day-to-day operations by 2030, and how we are partnering with Somerset Wildlife Trust to ensure cleaner rivers and local habitats for wildlife. Happy reading!



Marley Smith
Group Director of Communication & Community

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- 5 The flight of the Birdgirl - Mya-Rose Craig, conservationist and campaigner
- 6-7 Meet our people - water quality inspector Abbie Turner
- 9-11 Get active with Drop and Plop - activities for children
- 10 Nature holds the key - Mark Lloyd of the River's Trust talks about our River Water Guardians - ensuring cleaner rivers
- 12-13 Spotting leaks and keeping the water flowing - what we're doing
- 14-18 Wessex Water Foundation - supporting stronger communities
- 19 Join the fight against plastic pollution - our water refill project
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- 29 Avoiding water scams - tips on being vigilant
- 30 Feedback and contact us - your views and how to contact us

FOR YOU. FOR LIFE.

The learning never stops

Our education advisers explain what we have to offer - pages 26 to 27

Winter tips for your home

How to protect your home and garden - pages 6 to 7

The hard facts of water

What causes limescale - pages 12 to 13



In your area
What's been happening in your community - pages 14 to 21



DISCOVER OUR ONLINE RESOURCES

The team can support your learning goals virtually as well - either through an online workshop at your school or college, or even in the comfort of your living room.

"Our service is all about designing an education programme that ties in with teaching plans and class



objectives. To help with lesson planning we've also created an array of KS1 and KS2 resources and videos that parents, teachers and children can download for free," explains Meghan.

"We have produced science investigations, fact files, joke poo recipes, information about the water cycle and sewerage treatment, plus loads more."



Tim, our education adviser in Dorset, added: "We are also looking to expand our resources to ensure they are relevant to the latest curriculums at schools. These resources will cover a range of topics, such as climate change, flood alleviation and biodiversity. Additionally, we are busy making KS3 and KS4 resources."



Our education team are ready to assist in a range of online and offline learning.



in the news

Pete Orchard provides a round-up of how we've made the headlines

<p>Prize from customer watchdog</p> <p>We have again been singled out as a top performer in the annual Consumer Council for Water (CCW) complaints report.</p> <p>The number of written complaints received from customers in 2019/20 fell by 23% while there was a massive 40% reduction in Stage 2 complaints, where the cost of service is higher.</p> <p>This year's report - which also included complaints made via social media, web chat, 24/7 and in person - is rated as one of four standard performance categories: Outstanding, Good, Satisfactory and Needs Improvement.</p> <p>The water industry regulator Ofwat had placed a target of 17 complaints in its new 'C' category, which measures the quality of service delivered to customers.</p> <p>"We're committed to going the extra mile for our customers and talking our support to their needs to ensure we meet the director of customer policy and engagement's challenge."</p>	<p>Volunteers dig deep for better blue water</p> <p>Purdie Pre-school in Blandford, Dorset, created a new woodland learning area for children with help from two of our Water Force volunteers.</p> <p>General foreman Gordon Lawford and repair and maintenance team leader David Cole visited the school with an excavator on a Saturday to help dig holes for tree-planting, ensuring children from different local backgrounds could learn and play outdoors safely without having to leave their protective equipment.</p> <p>Sarah Matthews, CEO of the Institute of Environmental Management and Assessment (IEMA), said: "Action to tackle the climate and environmental crises we face requires business and industry to take ownership and our profession to help lead and best the transformation and change needed."</p> <p>Meanwhile, our engineering and sustainable delivery team were members of the local 'How to Safely Avoid' for the fourth time in five years, upgrading 100 high water pipes.</p> <p>Consent has been incorporated with infrastructure 2020 awards, which recognise the best in the local area and beyond."</p>	<p>Awards recognise environmental commitment</p> <p>Our environment and planning services colleagues were named Best Team from large organisations at this year's IEMA Sustainability Impact Awards.</p> <p>These award winners and business leaders are leading environmental issues in sustainable and innovative ways, such as our in-house road detection tool. They also highlighted our collaborative approach with regulators and other organisations as key to our success.</p> <p>Sarah Matthews, CEO of the Institute of Environmental Management and Assessment (IEMA), said: "Action to tackle the climate and environmental crises we face requires business and industry to take ownership and our profession to help lead and best the transformation and change needed."</p> <p>Meanwhile, our engineering and sustainable delivery team were members of the local 'How to Safely Avoid' for the fourth time in five years, upgrading 100 high water pipes.</p> <p>Consent has been incorporated with infrastructure 2020 awards, which recognise the best in the local area and beyond."</p>	<p>Helping to bring back the beloved beaver</p> <p>A five-year beaver trial on the River Otter has been completed with support from a number of organisations, including us.</p> <p>The trial, which was led by Devon Wildlife Trust, started in 2015 and has resulted in best family groups of beavers being successfully bred throughout the catchment.</p> <p>Beavers migrated on to our land which is connected to the river, and we've worked with the trust to make sure it's a haven for them - while also ensuring we can continue to provide a safe and secure water supply.</p> <p>We've also supported the University of Exeter with funding for monitoring equipment to help understand the beaver's behaviour better.</p> <p>The government has since announced it will allow the wider release of beavers to remain after the trial, which will bring significant benefits to the local area and beyond."</p>
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Understanding our rivers

Embracing the natural world has never felt more important than in this difficult year, and we all have a responsibility to safeguard it. Future wild river openings are popular in parts of our region, such as the idyllic Moleigh Weir near Bath, and we understand that people want to know more about our treatment of sewage at nearby water recycling centres.

In September we joined volunteers and collaborators to monitor the water quality of the River Avon, taking samples from 22 sites between Marlborough and Melksham as well as the tributaries which meet the Avon between these sites.

There is a campaign to make borough the UK's first river with designated bathing water status, similar to coastal sites where we treat waste water with ultra-soft 'high-quality' water. This process is costly and can have a massive environmental impact through carbon dioxide emissions. Currently, the treated waste water released into rivers meets different standards. This means it has no adverse effect on the environment but may not meet bathing water standards.

We believe river bathing water status is achievable but it will require significant investment, collaboration and changes in government legislation.

There has been some media focus recently on combined sewer overflows (CSOs), which release highly diluted sewage into rivers. During extreme rainfall, to prevent flooding, CSOs are only one type of storm overflow, with others located at sewage pumping stations and water recycling centres. These all affect river water quality along with factors such as agriculture, septic tanks, road drainage, interconnected drains and sewer misuse.

Mark Wheldon, our director of assets and compliance and a wild swimmer himself, said: "Storm overflows operate during heavy rainfall to protect homes and businesses from flooding and rarely cause a pollution - in fact, there were none in our region last year where overflows operated as designed."

"Our pollution that came from overflows was due to blocked sewer's downpipes, caused by a combination of wet weeds that had been wrongly flushed and fat poured down drains."

"It's predominantly rainwater that is released from CSOs, due to the sewerage network's existing capacity. But we agree that they are unacceptable in 2020 and we support any ambition to reduce the number of times they operate. CSOs are a legacy of a time when most UK properties were built with only one pipe to drain both foul water and storm water. Even today, developers still have the right to connect surface water to sewers that carry foul water. This has to change and we made illegal if we're serious about getting rid of them."

BOOK A FREE VISIT

You can download our free education resources and register in a free visit or future site tour by visiting wessexwater.co.uk