

Wessex Water

YTL GROUP



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Image Tracker January-March 2025

Report

April 2025



	'21/ '22 – '23/ '24	Q1 & Q2 '24/ '25	Q3 & Q4 '24/25
Sample definition	All adults 18+ living in the Wessex Water region		
Demographic profile	Demographic profile weighted to match ONS (2019-20) for Wessex Water region Supply areas represented in actual proportions		
Interview method	50% telephone 50% online survey	20% telephone 80% online survey	20% telephone 80% online survey
Sample source	Panel sample	Customer sample (from Wessex Water)	Customer sample (Wessex Water) Online panel
Bill payer status	80% bill payers 20% non bill payers	100% bill payers only	90% bill payers 10% non bill payer

Note: Given that the sample size for non bill payers is 35/694 for Q4 24/25, we have decided to report the total (but will make note if the differences between bill payers and non bill payers in the latest Quarter are significant throughout the report).

Note on the new segmentation (2024)

Customers are assigned into one of 6 segments.

The segments are based on the segmentation from November 2024 – which comprised a quantitative survey amongst Wessex Water customers, as well as focus groups.

There is some variation in the sizes of segments, and this should be taken into account when considering the opportunity each represents.

Segment 6: Carefree Consumers

Climate change sceptical – unwilling to make changes for environmental purposes, do not believe in or care about the issues and are negative about bills. High water consumption and uninterested in changing.

Segment 5: Pro-Planet Advocates

Climate anxious, company criticals – strongly pro-eco action and feel it's important we all do our bit. Would be prepared to do more, negative company outlook but has room to know more about Wessex Water.

Segment 4: Frugal Traditionalists

Disengaged and lacking concern – environment isn't top priority though and have some scepticism and budget concerns. Some openness for change due to having less water-intensive behaviours already.

Segment 1: Responsible Environmentalists

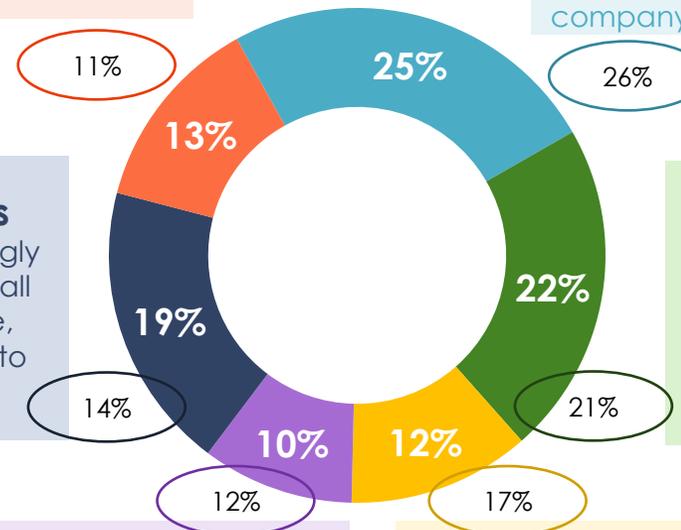
Action-oriented environmentalists – passionate about making eco changes and are likely to already be taking steps to reduce consumption. Knowledgeable on the topic and more positive company outlook.

Segment 2: Lifestyle Empowered

Comfortable, information driven, more families – fairly concerned about the environment, willingness to put money into water saving devices, prioritise values of hygiene and relaxation. Diverse media consumption, using many sources.

Segment 3: Convenience Cost-Savers

Younger, occupied, more families – enjoy relaxing and daily bathing, some environmental concerns but less proactive, feel a bit more negatively/less trusting towards Wessex Water.



Figures in the chart represent the customer proportions found in the original segmentation research sample. The circle figures represent the proportions among this sample for Q4 24/25.



1

Overall satisfaction with Wessex Water continues to decline this Quarter. Satisfaction with value for money is stable following consistent decline throughout 2024/25. Only half of customers agree that water and sewerage charges are affordable – a likely reflection of the highest levels of financial concern since 2022/23.

2

Customer priorities remain unchanged, with a reliable water supply and preventing sewage leaks ranked highest again this Quarter. When asked what Wessex Water could improve or do more of, customers continue to prioritise environmental action.

3

Perceptions of performance have fallen this Quarter compared to 2024/25 average – notably around the ease of paying bills. Trust in Wessex Water to provide a reliable supply and manage wastewater remains stable, and customer knowledge holds steady.

4

Despite ongoing affordability concerns, water-saving behaviours have declined – with self-reported water management at its lowest level since Q3 2022. One in three customers remains unsure how to reduce usage. While most behavioural change attitudes are unchanged this Quarter, uptake and willingness to use water butts have dropped – amidst wider cost concerns, could this be financially related?

5

Awareness of storm overflow use appears to have stabilised following a peak in Q2. News and word of mouth remain the main sources of hearing about these, though mentions via word of mouth and some other sources have decreased.

6

The majority still feel that current infrastructure and housing development are major contributors towards storm overflow usage - though some other drivers, including population growth, is less often cited as significant this Quarter. Awareness of Wessex Water's efforts to reduce storm overflows use is remains stable (and low) for Q4, with many fewer seeing coverage about mitigating efforts in the news compared to last Quarter.

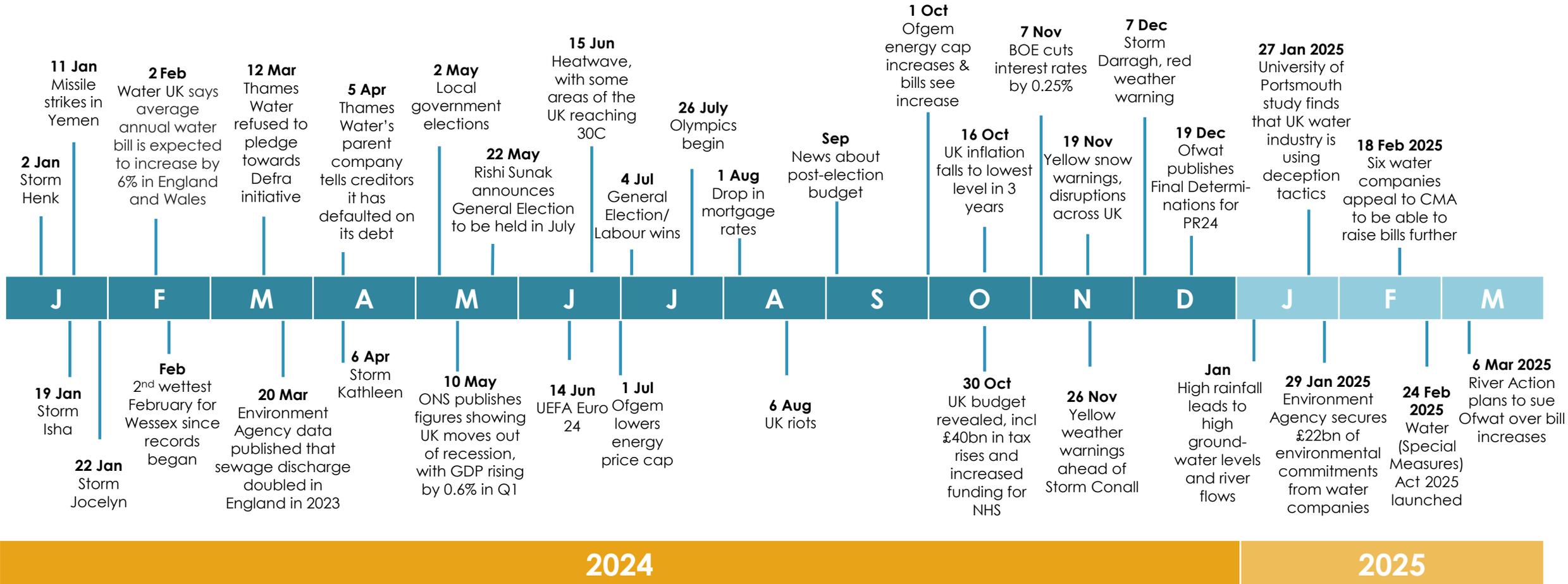


Wider context



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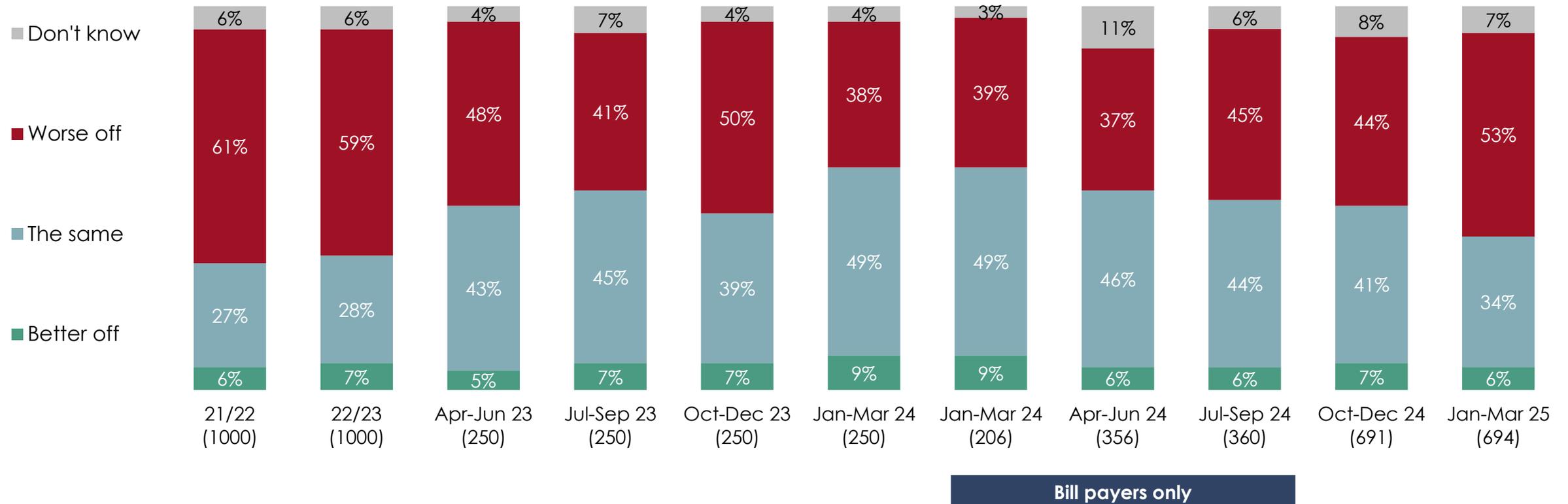
Timeline of key events



Over half of customers think they will be financially worse off in the next 12 months - the highest it has been 7 since 2022/23. A third expect no change.

Bill payers, vulnerable respondents, those aged 35+, and those in a lower social grade are more likely to feel pessimistic compared to their counterparts. Feelings are similar across the customer segments.

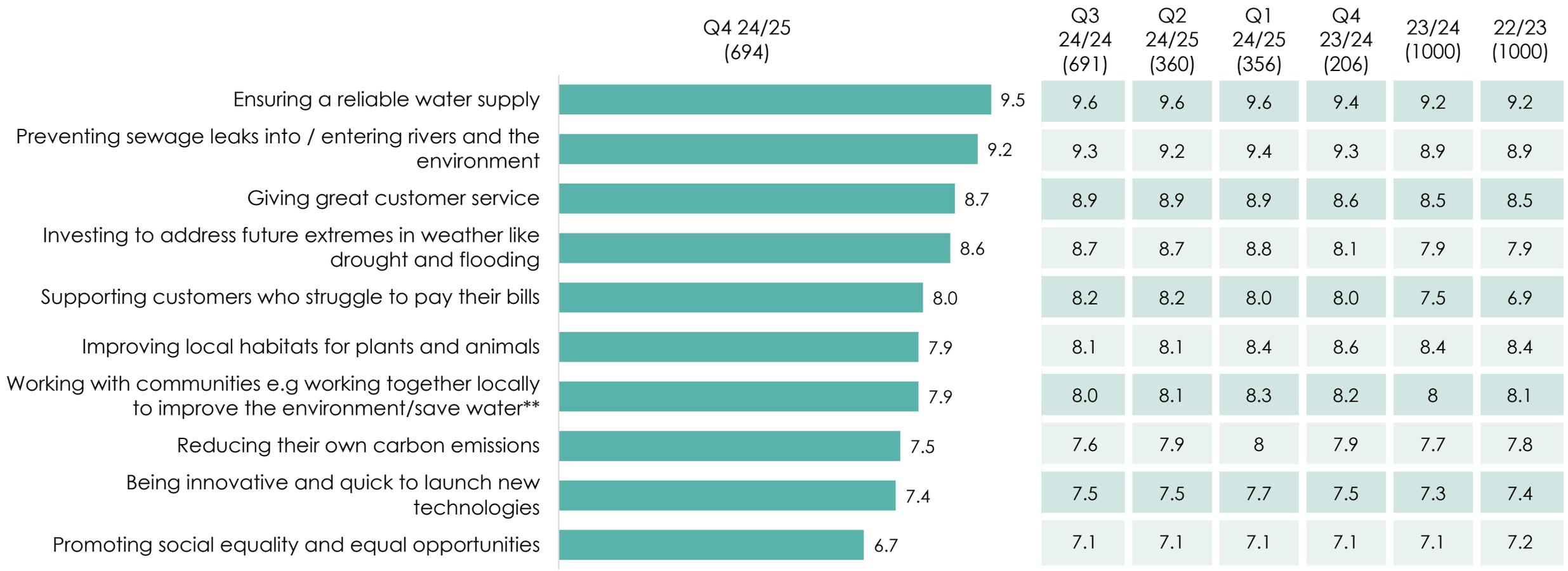
QF5. Thinking about the current economic climate, do you expect your household to be better off, worse off or about the same in the next 12 months? *Base: All respondents*



Priority areas remain stable this wave, with a reliable water supply and prevention of sewage leaks on top.

Under 35s are more likely to think support with bills, reducing carbon emissions and promoting social equality are important. 'Carefree Consumers' see less importance for improving local habitats, while 'Pro-Planet Advocates' place high importance on with communities.

Q7. How important do you think it is for Wessex Water to focus on each of the following things? Mean score (10 = 'a top priority' 0 = 'not a priority'). Base: All respondents



Bill payers only



Core Measures

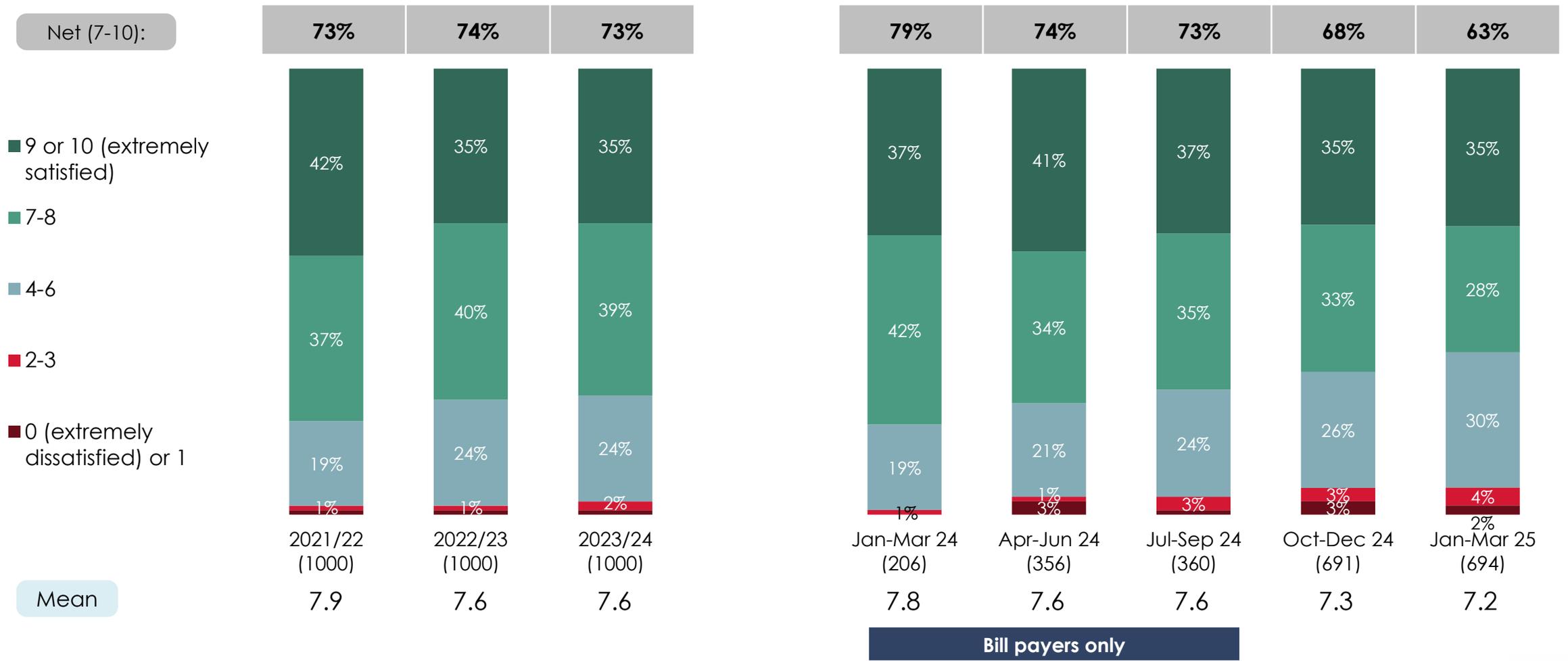


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Satisfaction with Wessex Water continues to fall, though the proportion 'extremely satisfied' remains stable.¹⁰

Satisfaction is lower among the 'Pro-Planet Advocates' and 'Carefree Consumers' compared to other customer segments. Those who feel the water quality in their area is good, those not worried about affording their bill and female customers feel more positively overall.

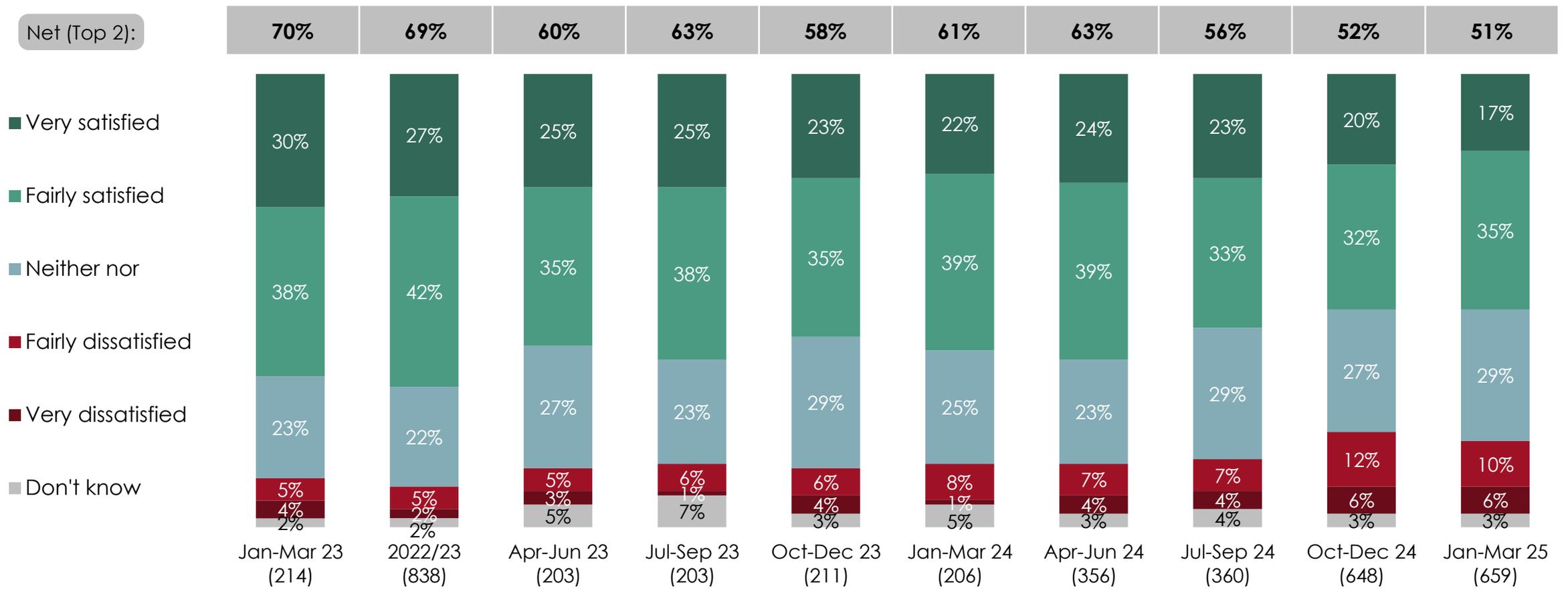
Q11. Taking everything into account, how satisfied are you with Wessex Water? *Base: All respondents*



After declining over the past year, satisfaction with value for money remains consistent this Quarter.

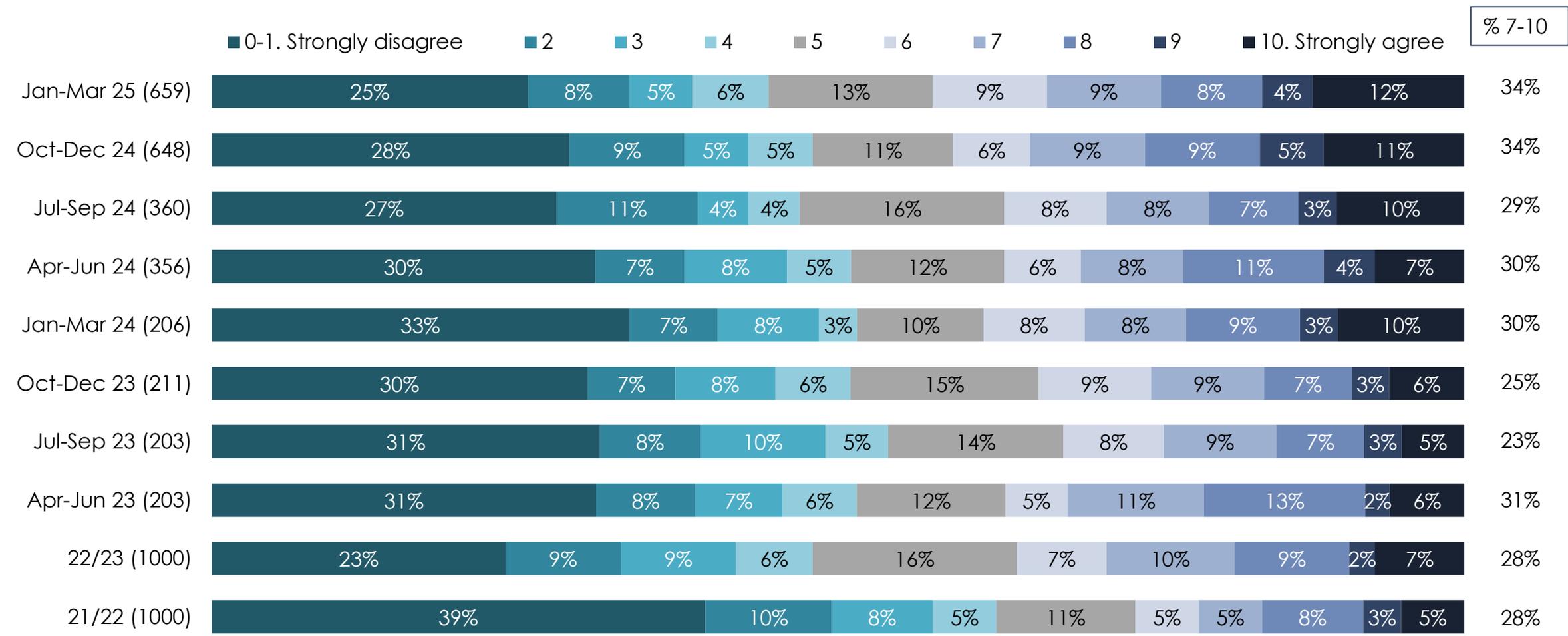
Satisfaction is highest among the Wessex Water supply area, C2DE social grades, and 'Frugal Traditionalists'. 'Carefree Consumers' remain the most dissatisfied segment.

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



'Pro-Planet Advocates', those not on a water meter, under 35s and C2DE social grades are more likely to feel worried.

Q15. How strongly do you agree or disagree...? - I worry about being able to afford my water bill *Base: All bill payers*



The proportion who agree that water/sewerage charges are affordable declines further, with only half of customers now agreeing that their charges are affordable. 13

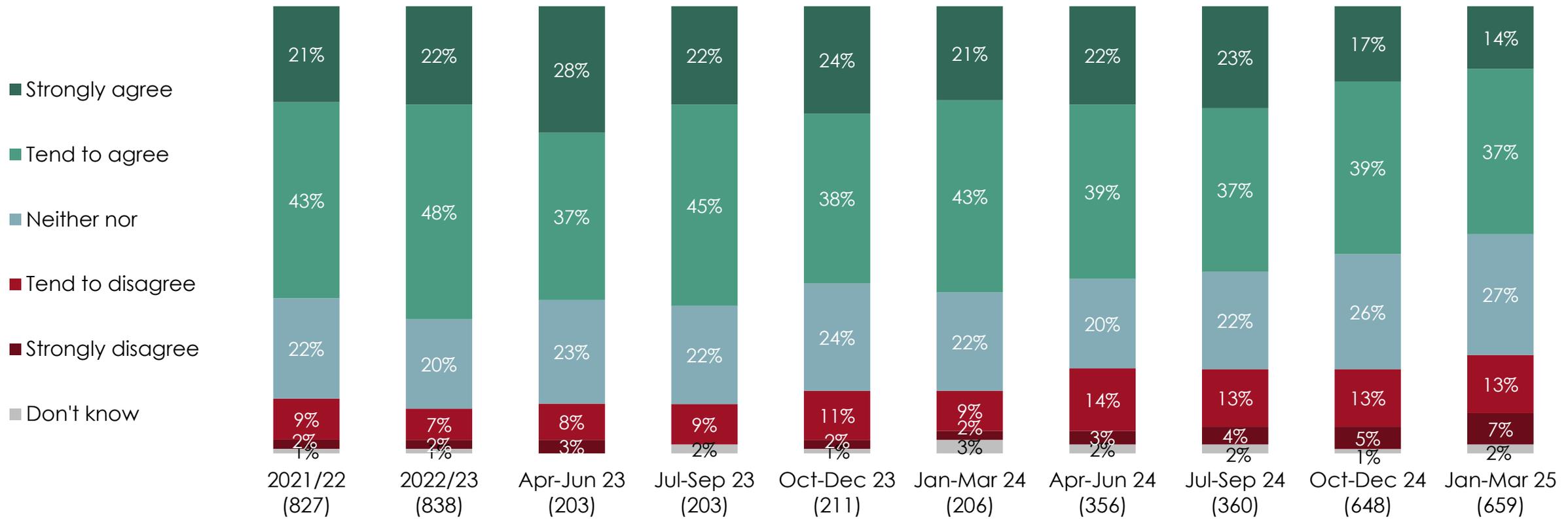
'Pro-Planet Advocates' and 'Carefree Consumers' are most likely to disagree that bills are affordable.

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

Base: All bill payers

% Agree
% Disagree

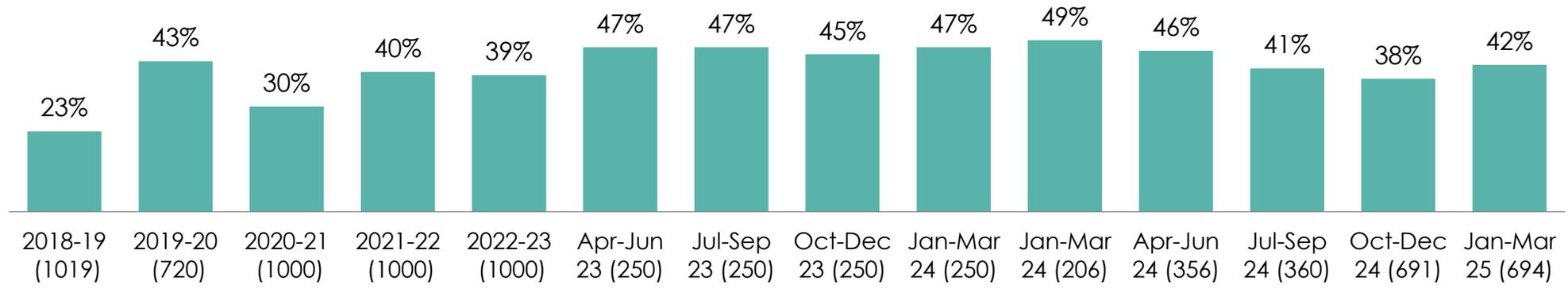
64%	70%	65%	67%	62%	64%	61%	60%	56%	51%
11%	9%	11%	9%	13%	11%	17%	17%	18%	19%



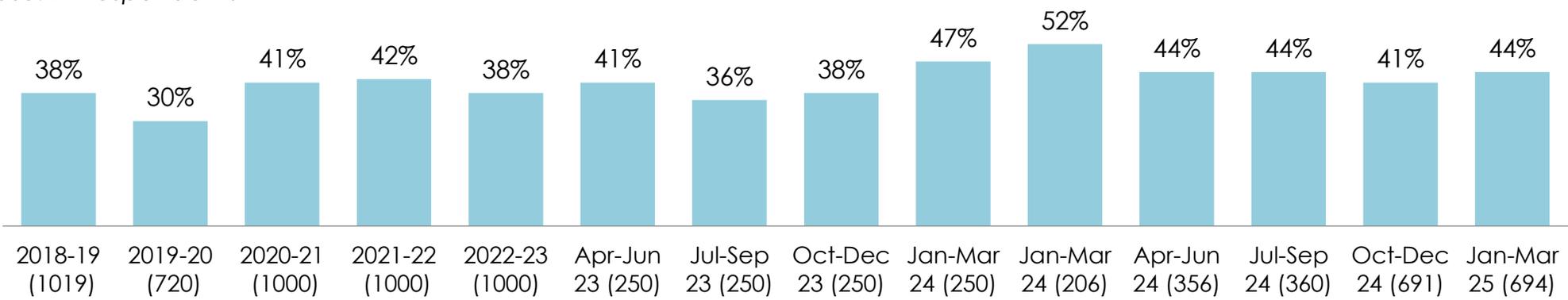
After a year of decline, awareness of both financial assistance and PSR picks up slightly this Quarter.

Awareness of PSR is higher among those who contacted Wessex Water in the last six months and highest for 'Responsible Environmentalists' among the different customer segments.

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



Q20r2: Are you aware of Wessex Water doing any of the following? - **Providing priority services for customers who need them, such as braille or extra support during a supply interruption** Base: All respondents



Bill payers only

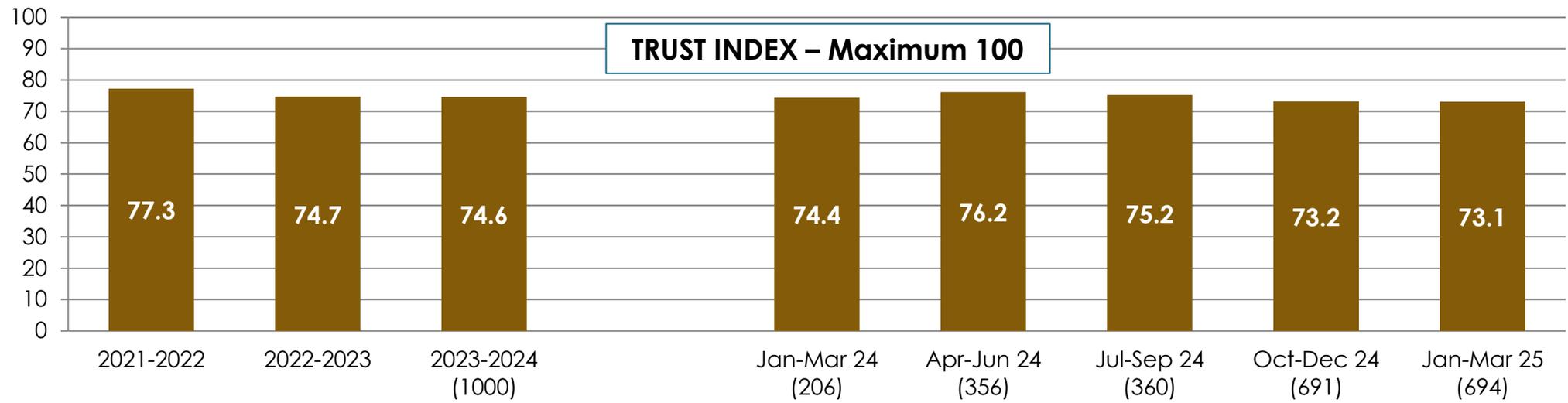


The current tracking study incorporates several image and performance measures that are known to drive trust, based on components of trust from ICS and Edelman models. The new 'Trust Index' is made up of **6 dimensions**

Trust dimensions	Tracker measures included
Customer ethos	<ul style="list-style-type: none"> • Care about you and your community • Making it easy for you to deal with them
Competence and capability	<ul style="list-style-type: none"> • Provide exceptional service • Fix any problems quickly
Reliability and dependability	<ul style="list-style-type: none"> • Reliability of their services • Easy to contact
Transparency	<ul style="list-style-type: none"> • Open and transparent company • Providing clear and easy to understand information
Ethics	<ul style="list-style-type: none"> • A responsible and ethical company that does the right thing • Care about the environment
Brand validation	<ul style="list-style-type: none"> • Well regarded in your community

The Trust Index score (and most of its components) remains in line with Q3.

There are no significant differences between subgroups, though 'Pro-Planet Advocates' are the most negative on most measures.



Components - Mean scores

Component	2021-2022	2022-2023	2023-2024 (1000)	Jan-Mar 24 (206)	Apr-Jun 24 (356)	Jul-Sep 24 (360)	Oct-Dec 24 (691)	Jan-Mar 25 (694)
Reliability and dependability	8.20	8.05	8.18	8.20	8.30	8.33	8.12	8.02
Competence and capability	7.68	7.39	7.23	7.21	7.44	7.56	7.22	7.23
Customer ethos	7.64	7.40	7.34	7.36	7.63	7.41	7.29	7.27
Transparency	7.78	7.62	7.73	7.73	7.73	7.79	7.47	7.47
Ethics	7.44	7.16	6.93	6.76	7.08	6.93	6.87	6.81
Brand validation	7.42	6.98	6.97	6.93	7.06	7.13	6.57	6.66

Bill payers only



The proportion of customers who feel **knowledgeable** about Wessex Water holds steady this Quarter, in line with the rest of the year.

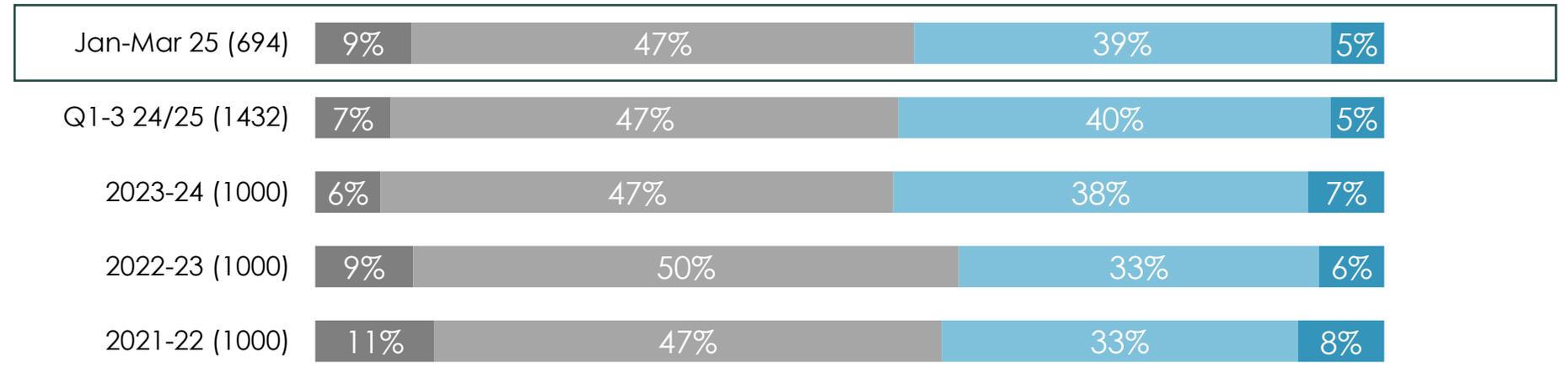


The proportion of customers who feel **positive** about Wessex Water has decreased slightly this Quarter.

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

Base: All respondents

■ Nothing at all ■ A little ■ A fair amount ■ A lot

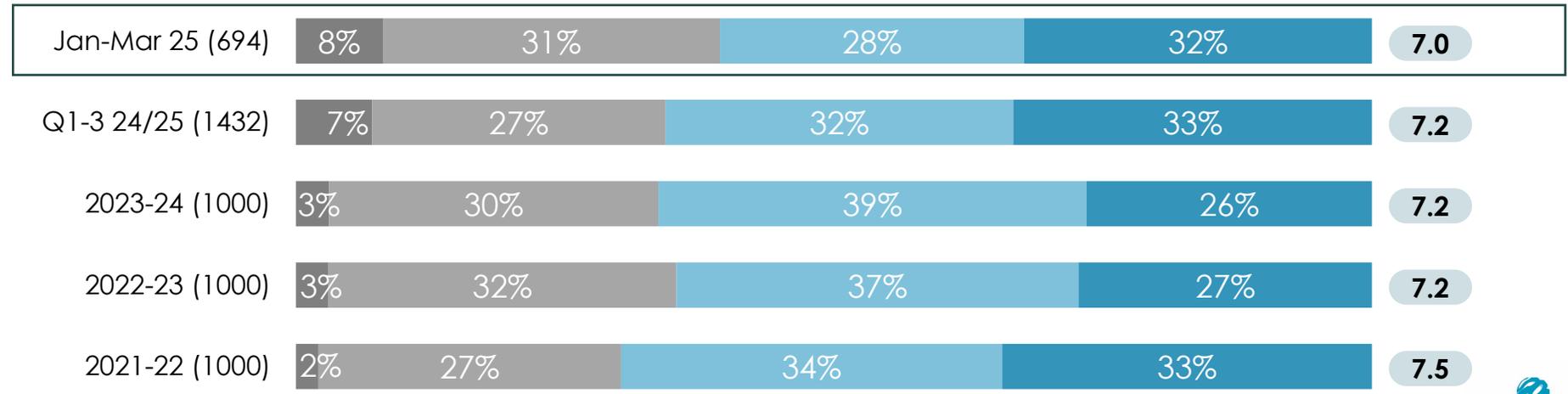


Q4. Now thinking about Wessex Water. Please tell us how do you feel about them overall?

Base: All respondents

■ Negative (0-3) ■ Neutral (4-6) ■ Fairly positive (7-8) ■ Very positive (9-10)

Mean

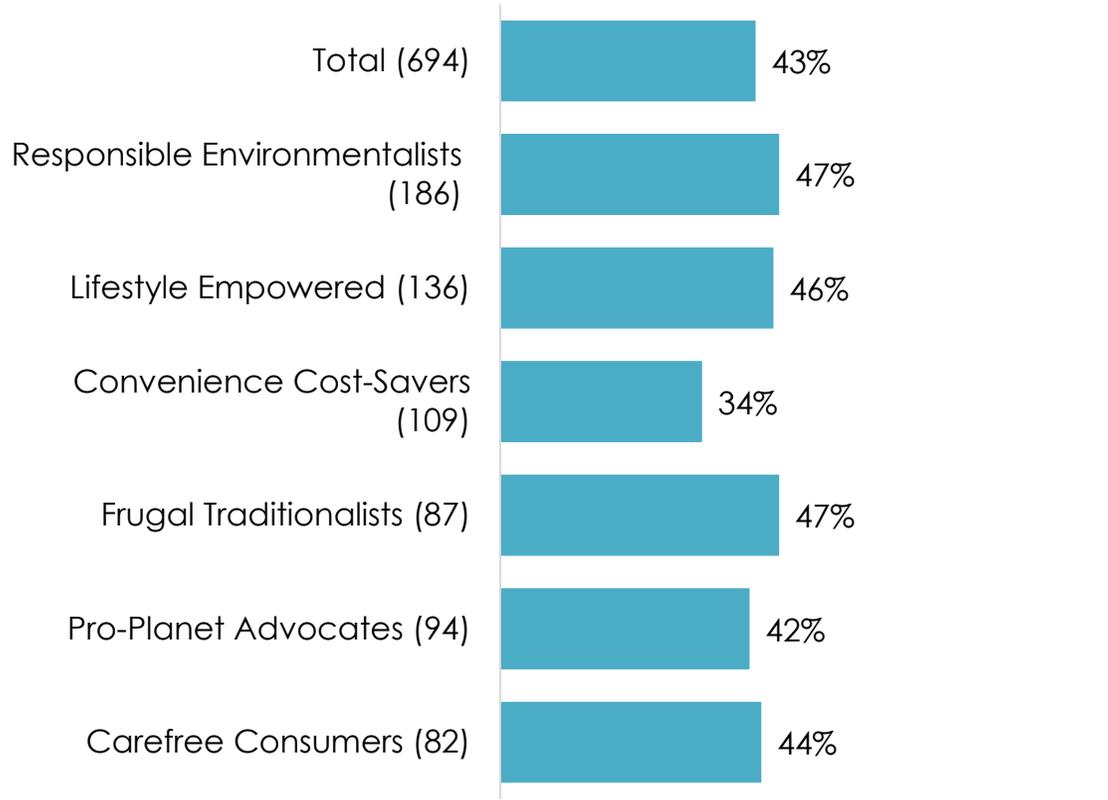


Methodology change in Q1 2024/25 – excl. non bill payers; Methodology change in Q3 2024/25 – includes non bill payers

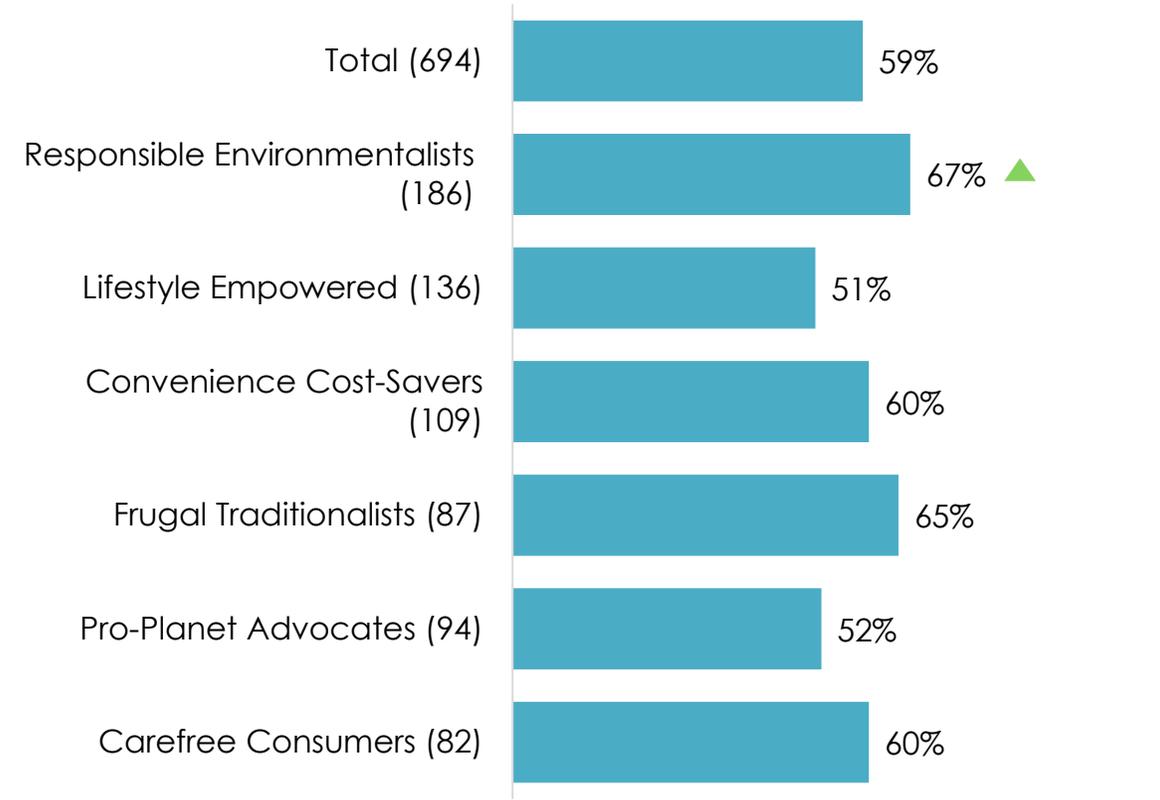
Knowledge about Wessex Water is relatively consistent across most segments, while positive sentiment towards Wessex Water is slightly more varied.

'Convenience Cost-Savers' are least likely to feel knowledgeable, while 'Lifestyle Empowered' and 'Pro-Planet Advocates' are least likely to feel positive about the company.

Q6. How much do you feel you know about Wessex Water and what they do?
(% A fair amount/a lot)



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

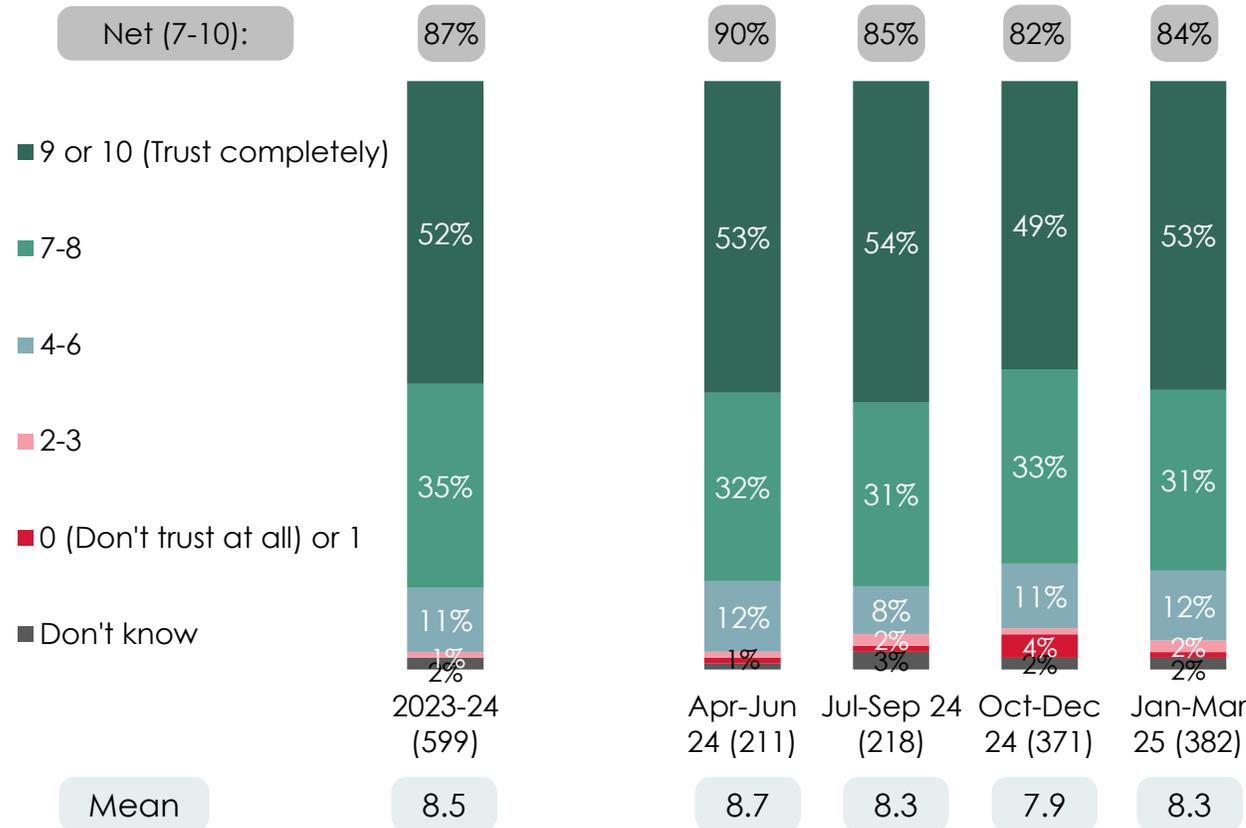


Trust in Wessex Water to provide a reliable supply of tap water and wastewater management is similar to last Quarter. 19

While trust in delivering good quality tap water is highest among 'Responsible Environmentalists' and 'Convenience Cost-Savers', the 'Frugal Traditionalists' and 'Carefree Consumers' are most trusting that Wessex Water will responsibly deal with their wastewater and sewage.

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

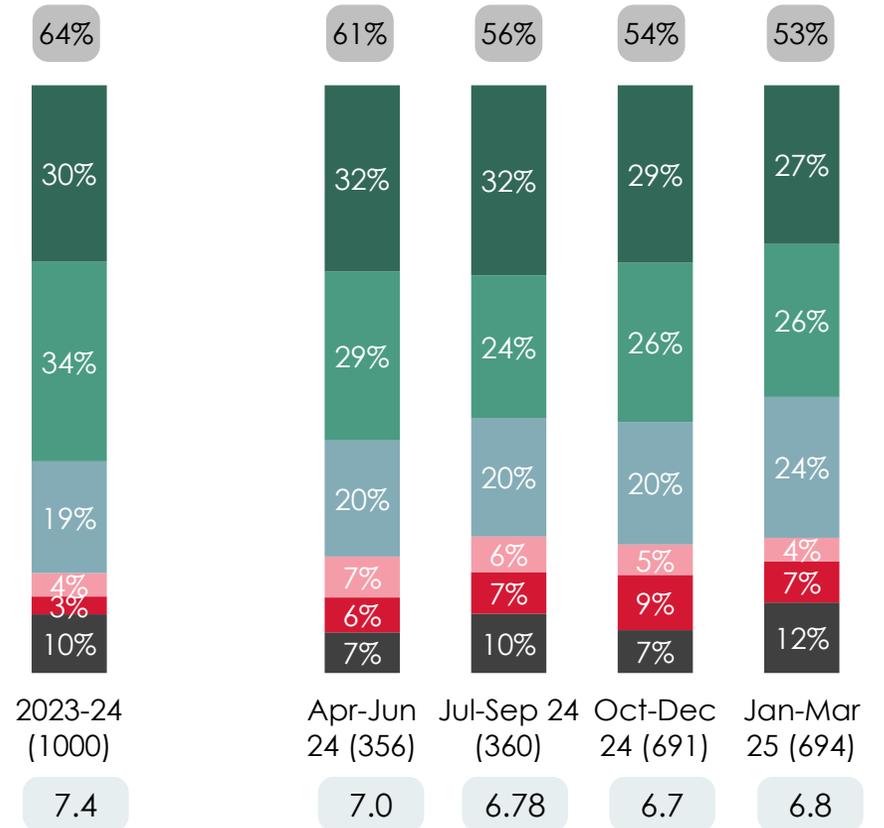
Base: All respondents in supply area



Bill payers only

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

Base: All respondents



Bill payers only



Brand health and image

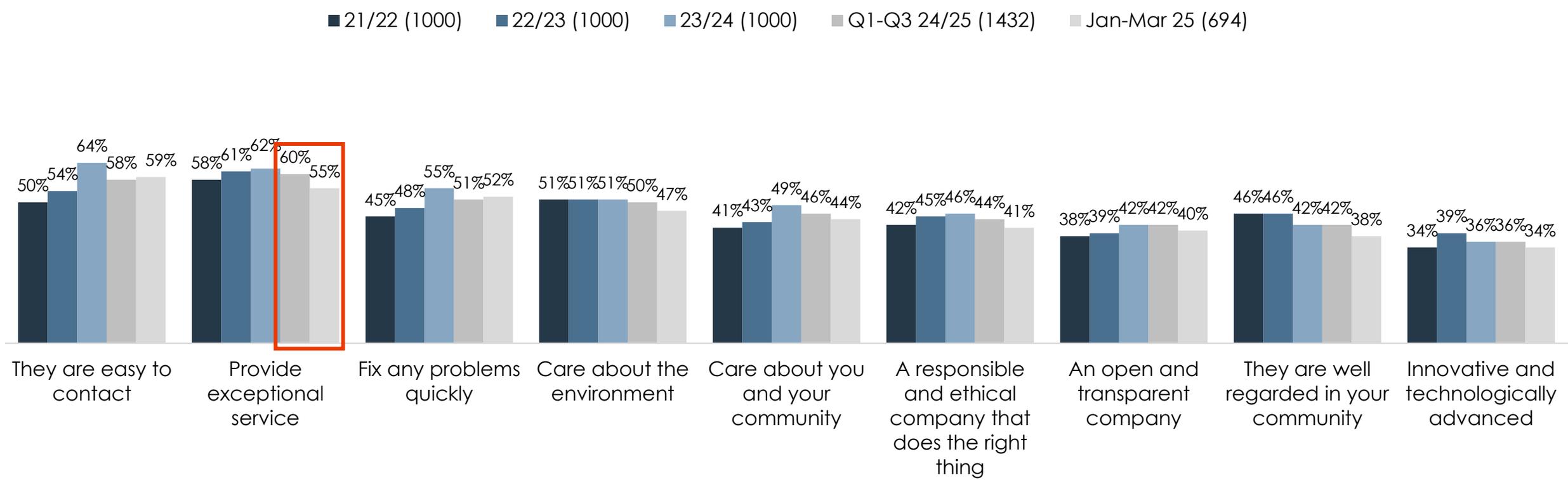


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Compared to the Q1-3 average, for Q4 most of the brand image metrics have dropped slightly – falling significantly for ‘Provide exceptional service’.

‘Provide exceptional service’ has moved from being the most common description, to the second most common due to this 5% decrease in the proportion of customers who agree, while ‘Being easy to contact’ moves into the lead.

Q8. Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? % rating 7-10 (10 = ‘strongly agree’ 0 = ‘strongly disagree’). Base: All respondents

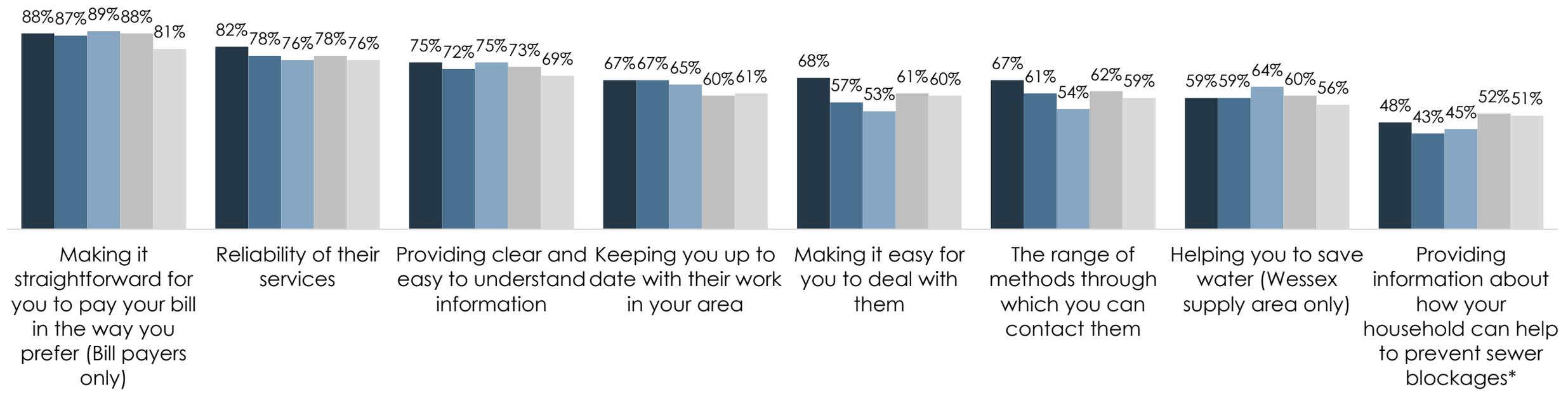


Some performance areas have declined against the year's average – most notably 'ease of paying bills'. ²²

However, customers in the Wessex Water supply area are significantly more likely than all others to be satisfied with several of these metrics, including reliability of services, ease of paying bills, provision of clear information, keeping people up to date and being easy to deal with.

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

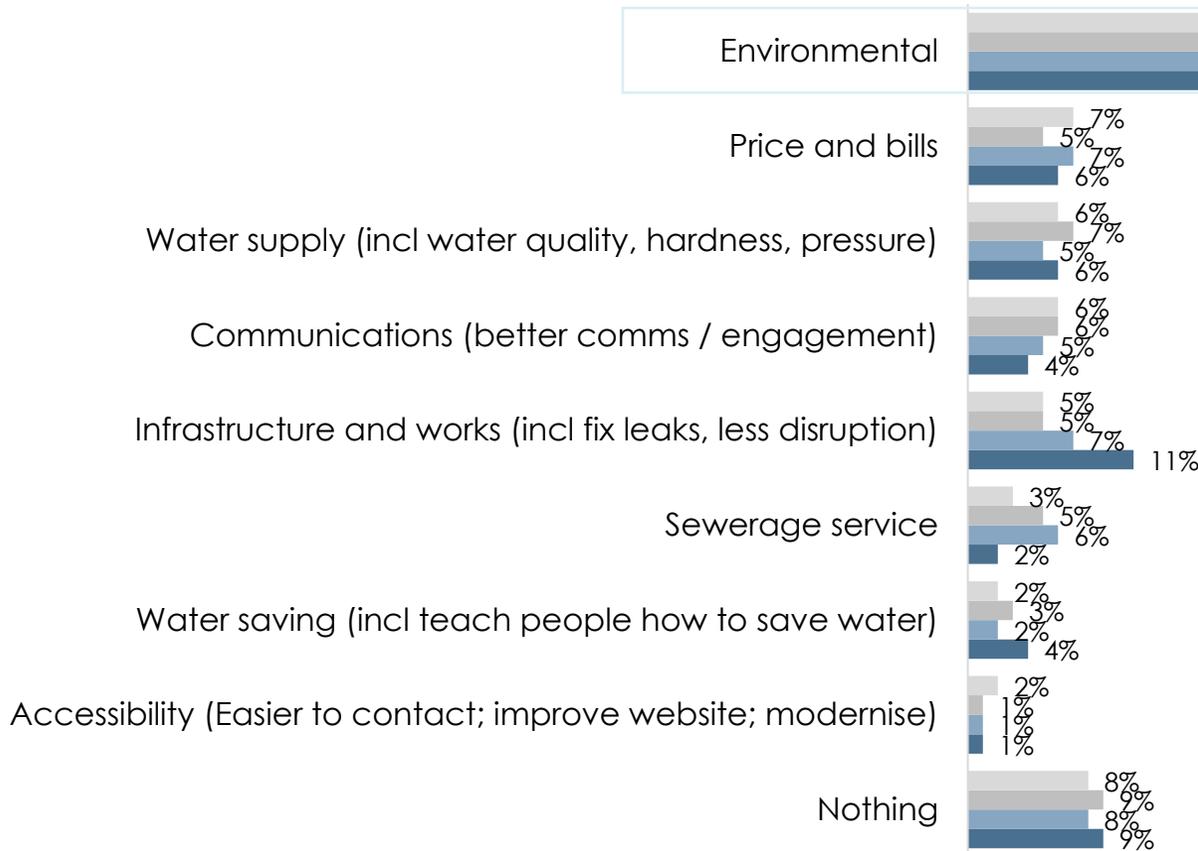
■ 21/22 (1000) ■ 22/23 (1000) ■ 23/24 (1000) ■ Q1-Q3 24/25 (1432) ■ Jan-Mar 25 (694)



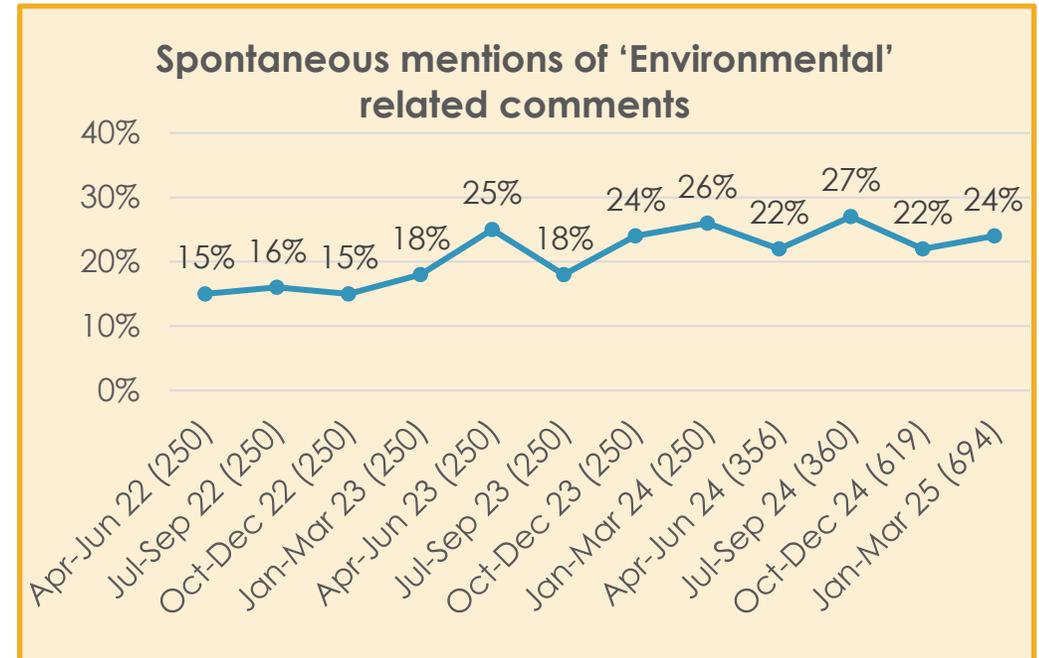
Specifically, customers are thinking about reducing or mitigating sewage in rivers and seas.

Q14: Thinking of all the things that Wessex Water do and could do in future, what do you think it could do more of, or do better at? Base: All respondents

■ Jan-Mar 25 (694) ■ Q1-Q3 24/25(1432) ■ 23/24 (1000) ■ 22/23 (1000)



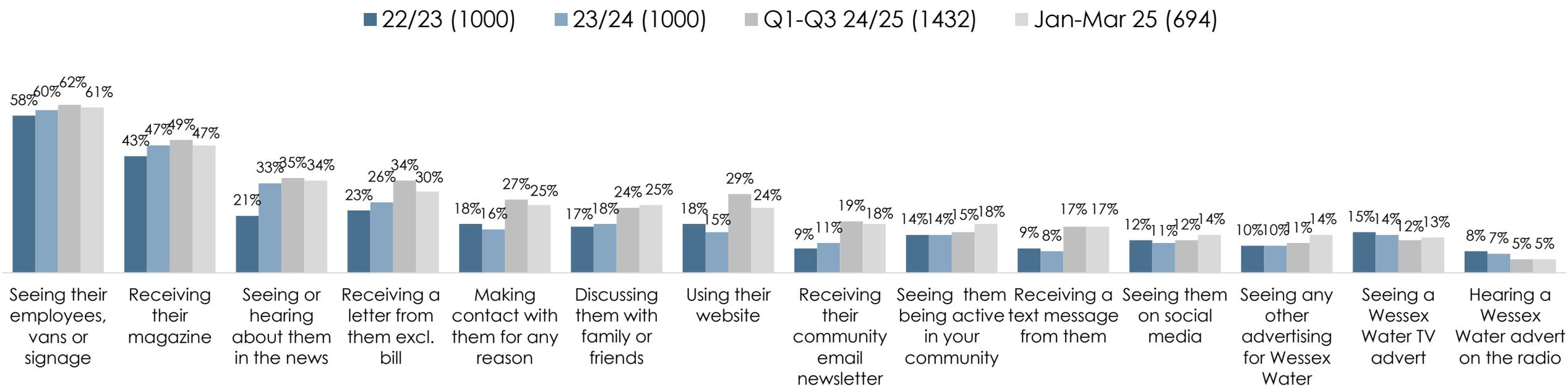
Should be no sewage in rivers/sea	12%
Should be less sewage in rivers/sea	5%
Be more environmentally friendly	4%



The upward trend in the proportion of customers who recall various touchpoints in previous waves has been curbed, with slight decreases in the most common touchpoints.

However, the proportion who recall seeing Wessex Water be active in their community, or who recall other advert types about the company, has increased slightly.

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



'Responsible Environmentalists' are notably more likely to recall receiving the Wessex Water magazine, while 'Convenience Cost-Savers' are significantly below the average. 25

'Frugal Traditionalists' are more likely to recall receiving Wessex Water's community email newsletter.

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

	Total	Responsible Environmentalists	Lifestyle Empowered	Convenience Cost-Savers	Frugal Traditionalists	Pro-Planet Advocates	Carefree Consumers
Base size	694	186	136	109	87	94	82
Seeing their employees, vans or signage	61%	62%	59%	61%	66%	57%	62%
Receiving their magazine	47%	58% ▲	53%	28% ▼	47%	38%	49%
Seeing or hearing about them in the news	34%	32%	39%	35%	36%	32%	26%
Receiving a letter from them other than your bill	30%	24%	29%	28%	39%	35%	32%
Discussing them with family or friends	25%	25%	25%	23%	23%	29%	26%
Making contact with them for any reason	25%	27%	24%	23%	28%	29%	21%
Using their website	24%	27%	23%	17%	22%	22%	33%
Receiving their community email newsletter	18%	16%	18%	14%	31% ▲	14%	23%
Seeing or hearing about them being active in your community	18%	18%	18%	21%	19%	15%	20%
Receiving a text message from them	17%	15%	19%	14%	23%	11%	20%
Seeing any other advertising for Wessex Water	14%	16%	12%	13%	19%	10%	13%
Seeing them on social media	14%	9% ▼	17%	15%	17%	15%	18%
Seeing a Wessex Water TV advert	13%	10%	10%	14%	15%	18%	13%
Hearing a Wessex Water advert on the radio	5%	2% ▼	3%	4%	11%	6%	9%



Water use behaviours

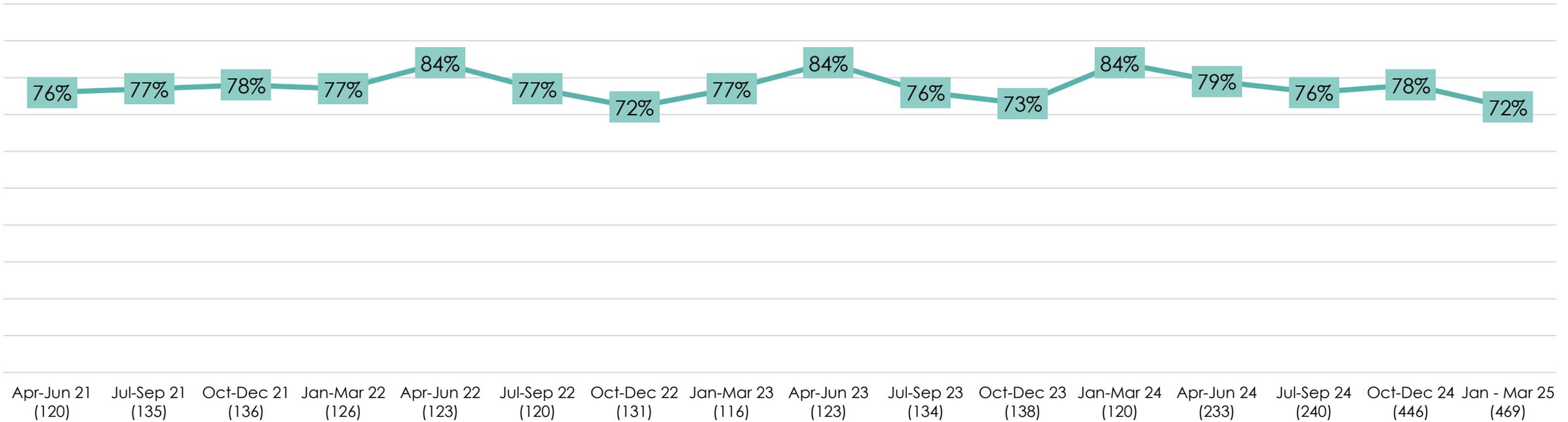


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This is still the majority of customers, with around 7 in 10 customers agree they manage their water use – driven by those 55+.

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

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

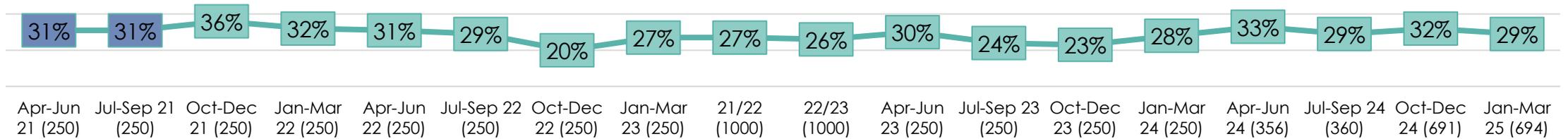


*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter"
 New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers Methodology change in Q3 2024/25 – includes non bill payers)

Half of customers continue to show an interest in smart metering – staying stable across 2024/25.

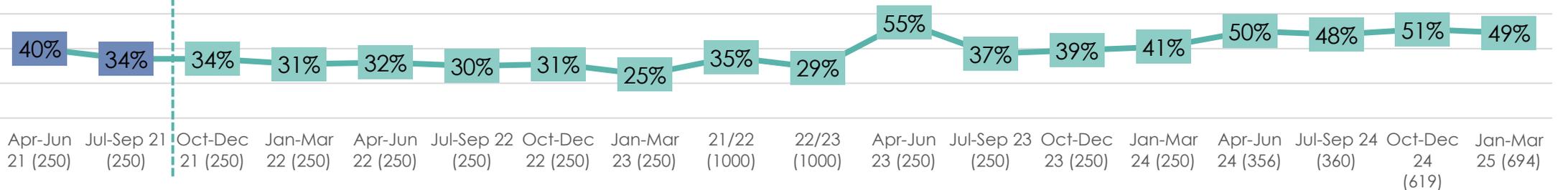
QF1. And how much would you agree or disagree with ...? % rating 7-10 (10 = 'strongly agree'). Base: All respondents

I'm not sure how I can reduce my household's water use



I'd be interested in having a smart meter

I'd be interested in having more frequent updates on how much water I'm using and how much it is costing**



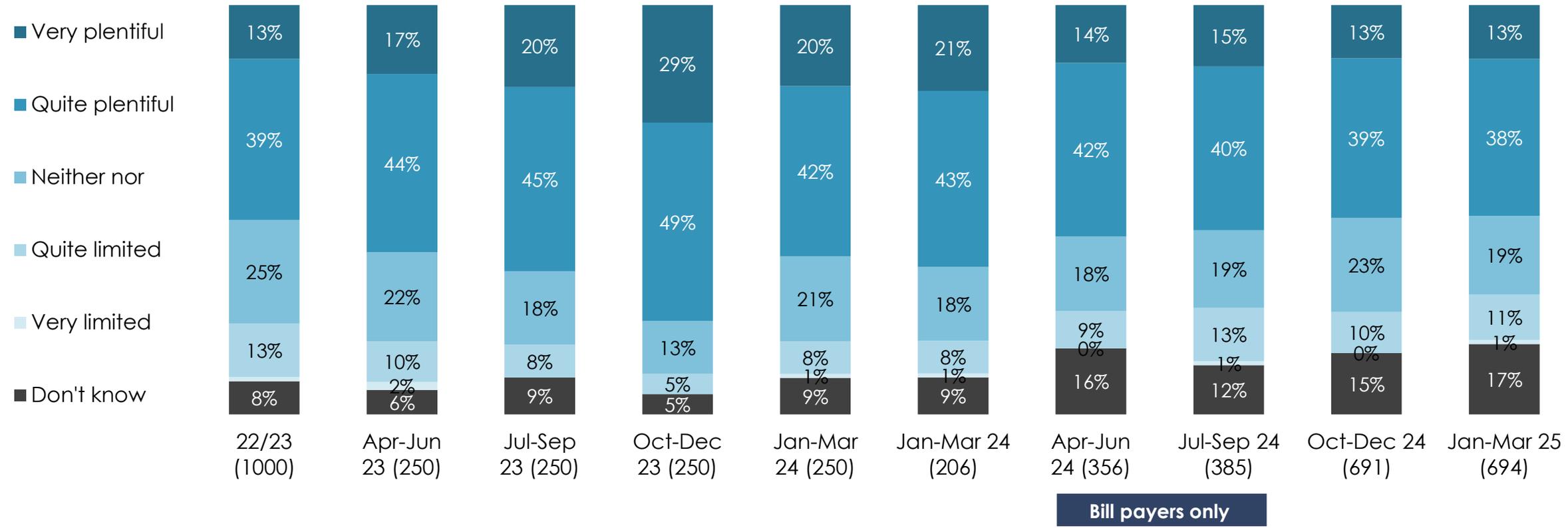
*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter" New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers Methodology change in Q3 2024/25 – includes non bill payers)

Impressions of water availability have stayed level across 2024/25, unlike the notable variations in 2023/24.²⁹

The increase in uncertainty which emerged in Q1 2024 reaches its highest level to date.

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

Base: All respondents

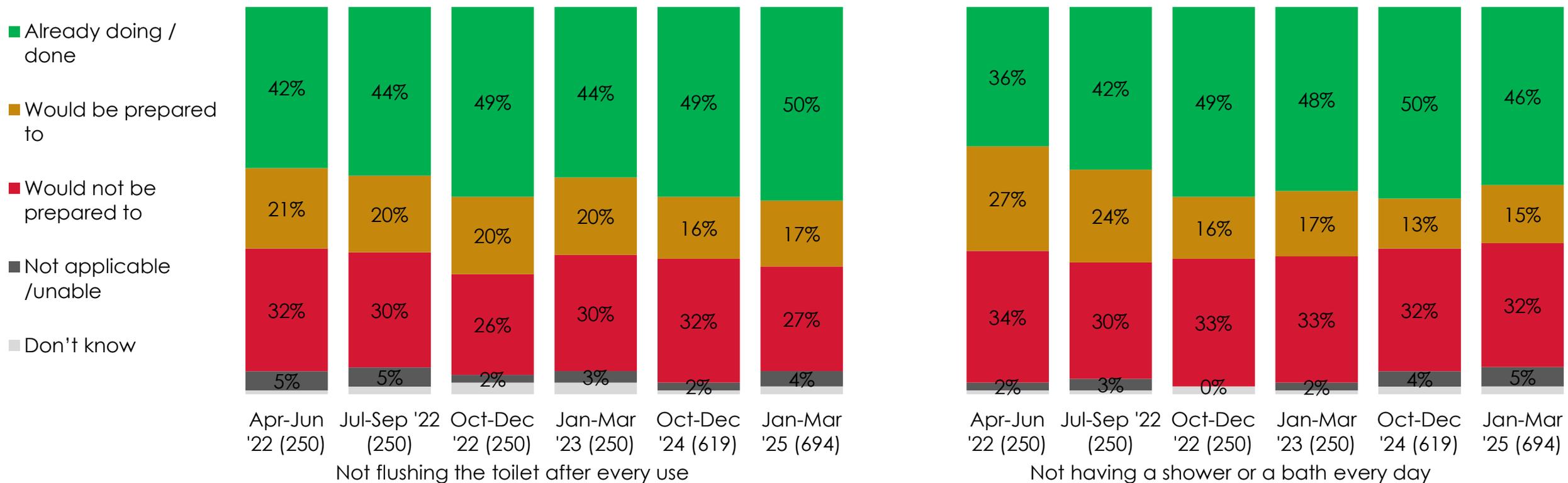


*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter"
New methodology: Customer sample used from Q1 2024-2025 (excludes non bill payers Methodology change in Q3 2024/25 – includes non bill payers)

There is little change in water saving behaviours across 2024/25, with almost half of customers continuing to report reducing their flushing and bathing frequency. 30

The proportion of those unwilling to take these measures holds steady.

QF2c1/2. Please tell us which of these you are already doing / you have already done, and which others, if any, you would be prepared to do, to reduce your use of water? Base: All respondents

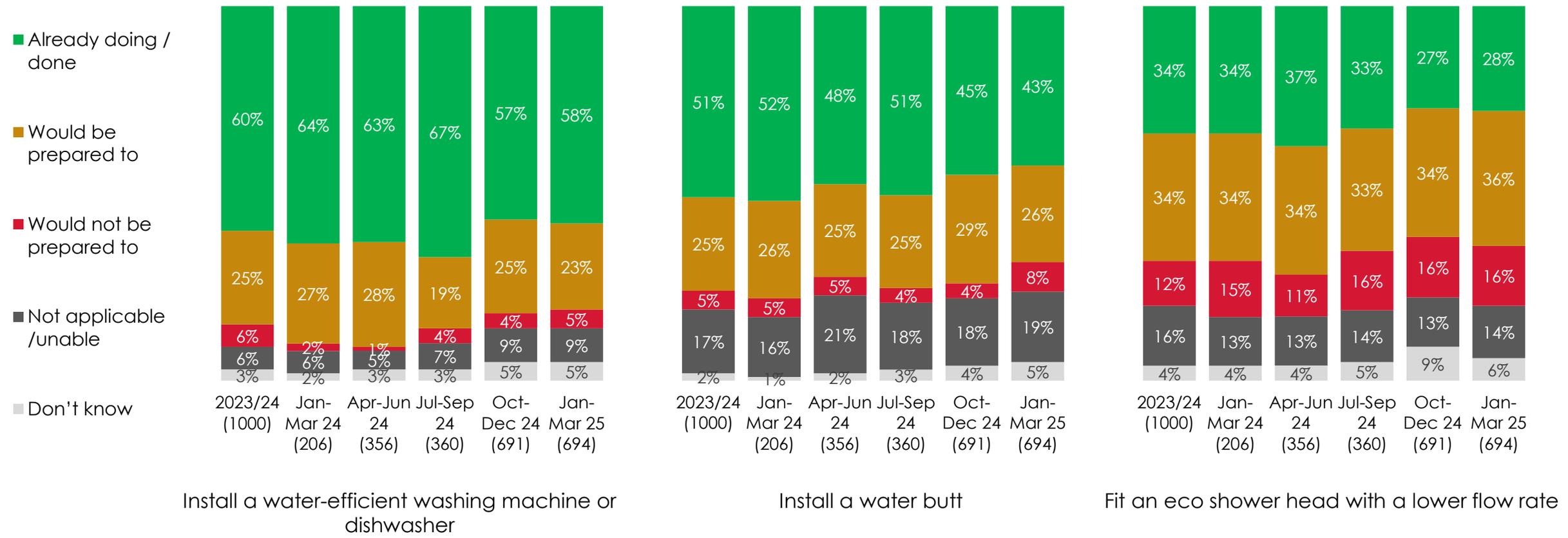


Openness to installing water-efficient devices and eco shower heads remains unchanged this Quarter, but there is increased hesitation regarding water butts.

Fewer are prepared to install a water butt than in previous Quarters, with the highest levels of direct refusal observed so far (8%).

QF2c1/2. Please tell us which of these you are already doing / have already done, and which others, if any, you would be prepared to do, to reduce your use of water?

Base: All respondents 2023/24, Bill payers Jan-Mar 2024, Apr-Jun 2024, Jul-Sep 2024, All respondents Oct-Dec 24, Jan-Mar 25





Storm overflows

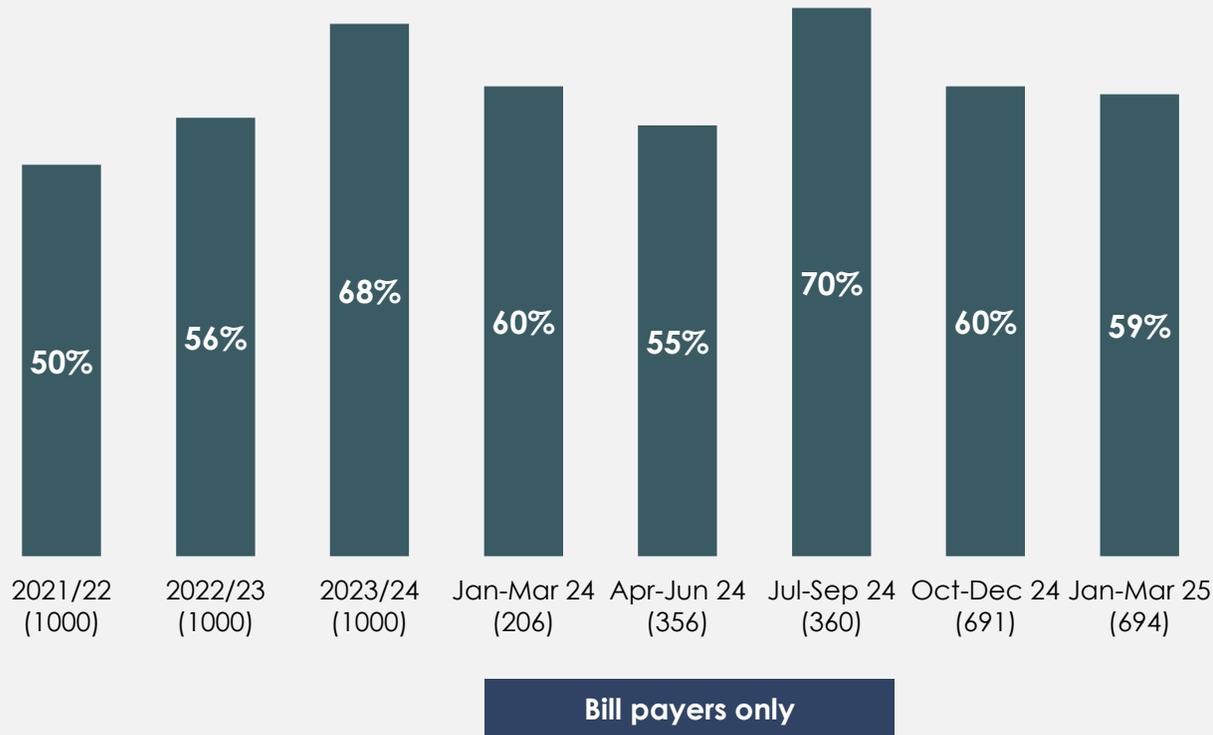


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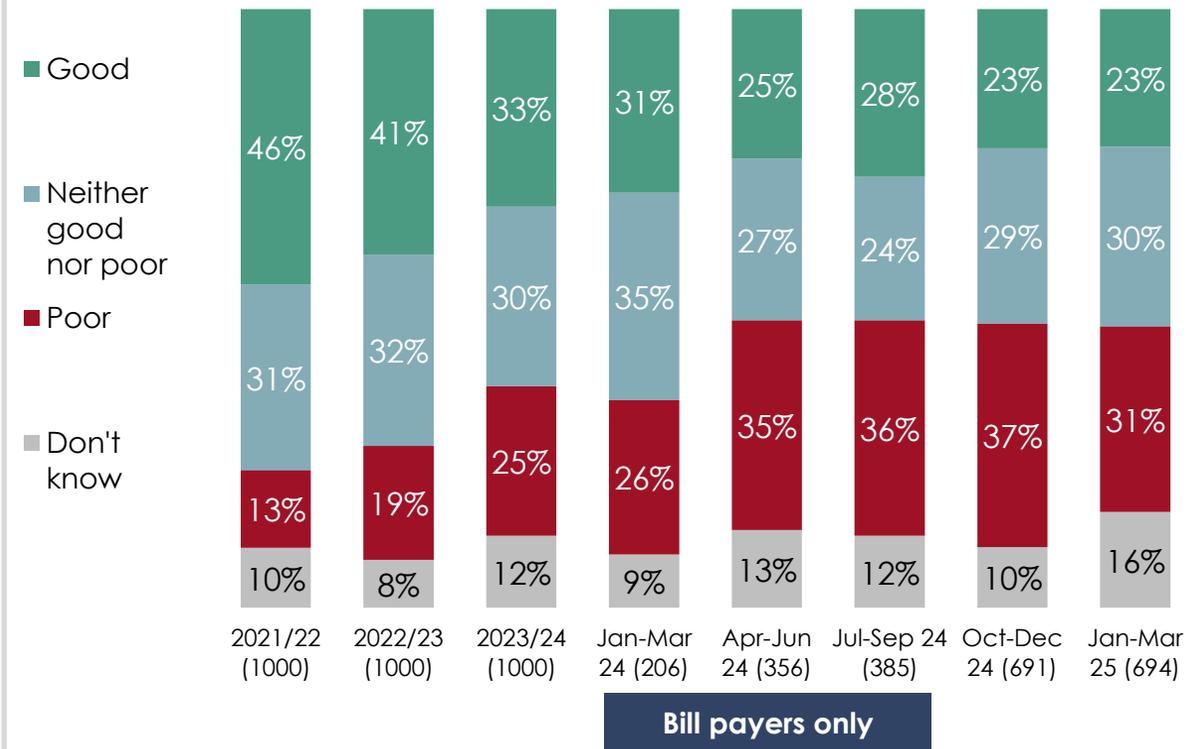
'Responsible Environmentalists' still show much higher awareness of these than the other customer segments (7 in 10). Fewer customers rate their local quality as 'poor' this Quarter, with an uptick in those unsure.

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

Base: All respondents



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

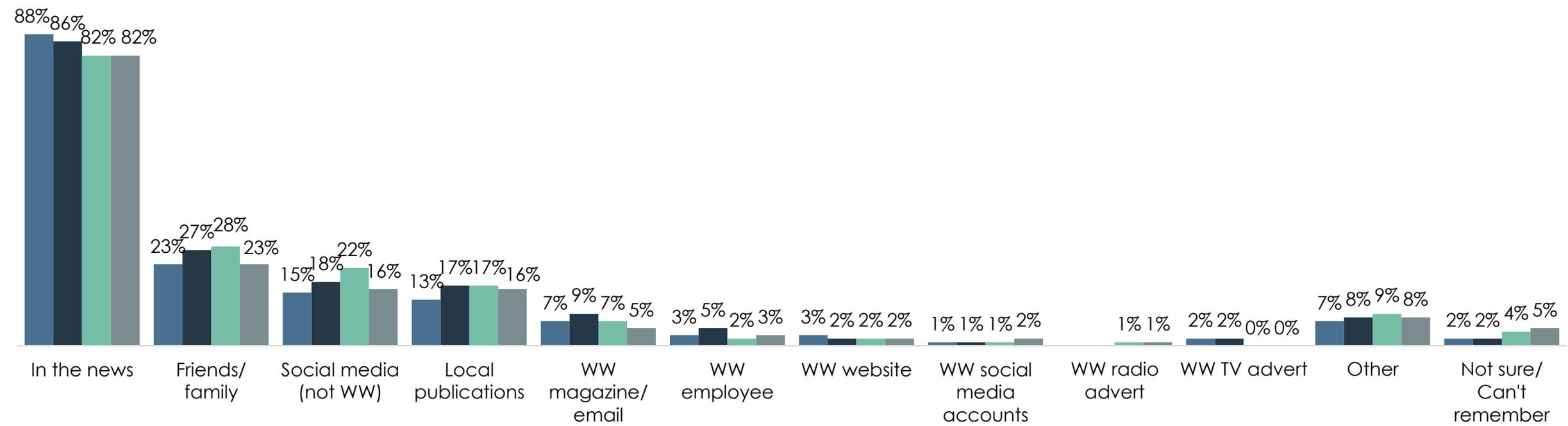


News coverage and word of mouth remain the primary sources of awareness for storm overflow releases.

There has been a slight decline in those hearing about this from their friends / family and social media from Q3 – though higher among 'Lifestyle Empowered' for both.

QF1e. And where did you hear about this topic? Base: Those aware of storm overflows

■ Apr-Jun 24 billpayers (209) ■ Jul-Sep 24 billpayers (252) ■ Oct-Dec 24 (415) ■ Jan-Mar 25 (411)

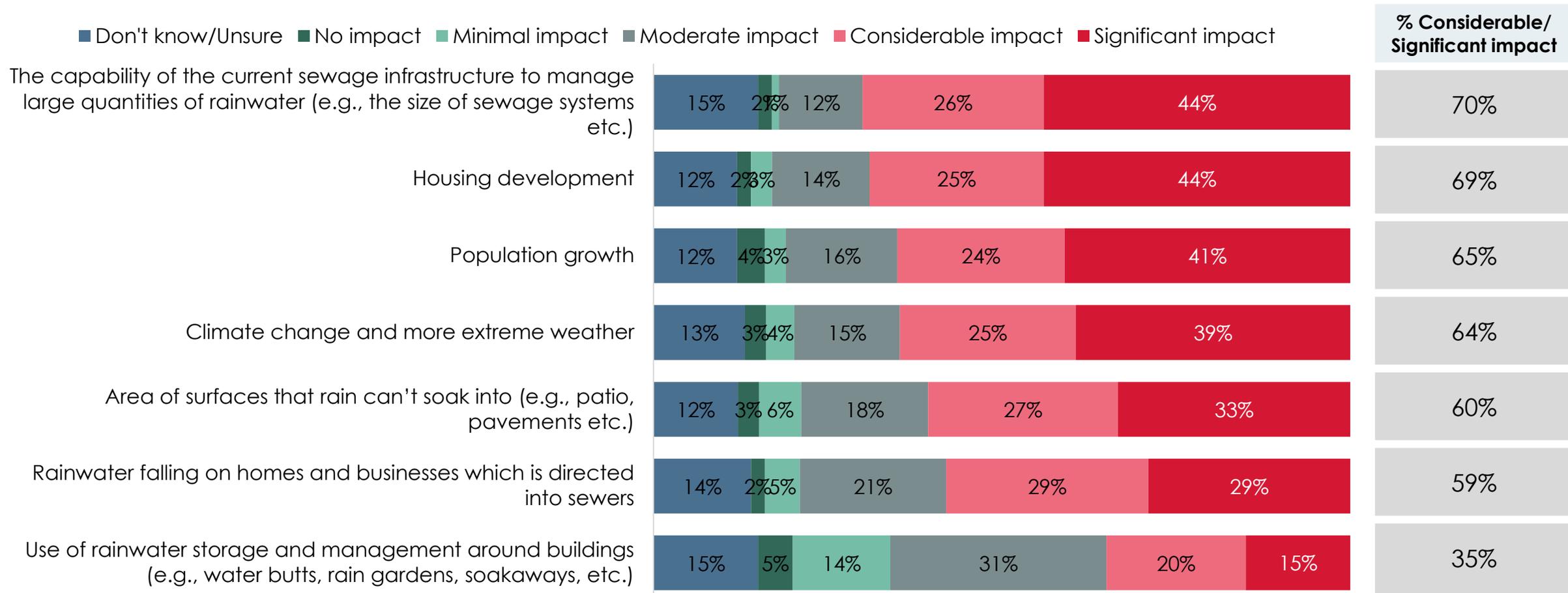


Current infrastructure capabilities, housing development and population growth continue to be named as the top 3 contributors to storm overflow usage. 35

The Bournemouth Water supply area falls behind Wessex Water and Bristol Water for recognising the significance of these three factors.

QF1f. What impact, if any, do you think the following factors have on how often storm overflows are used?

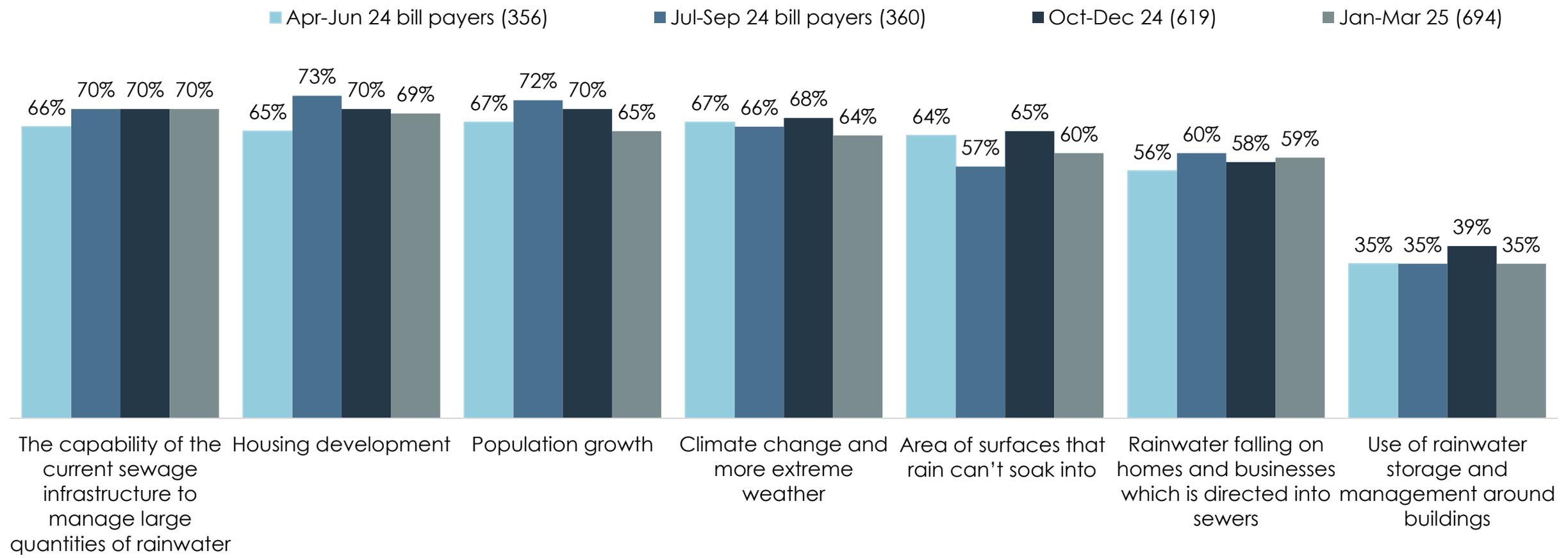
Base: All respondents



While population growth remains a top 3 driver, it drops 5% points since Q3.

Climate change, surface types and rainwater storage also drop 4-5% points this Quarter.

QF1f. What impact, if any, do you think the following factors have on how often storm overflows are used? (% saying significant/considerable impact)

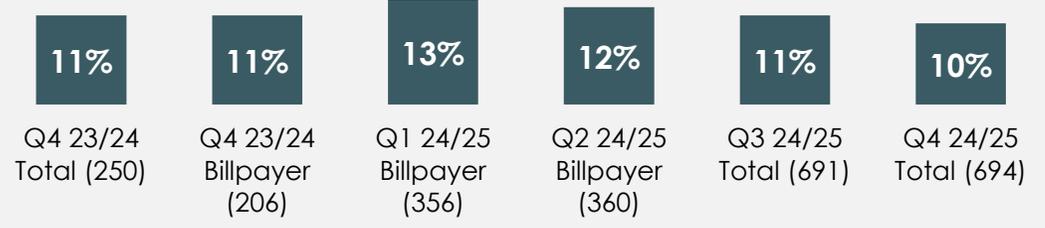


Awareness of Wessex Water's efforts to reduce storm overflows use remains low.

Wessex Water's own publications and the news remain the leading sources of information, though hearing about it in the news drops 9% points from Q3.

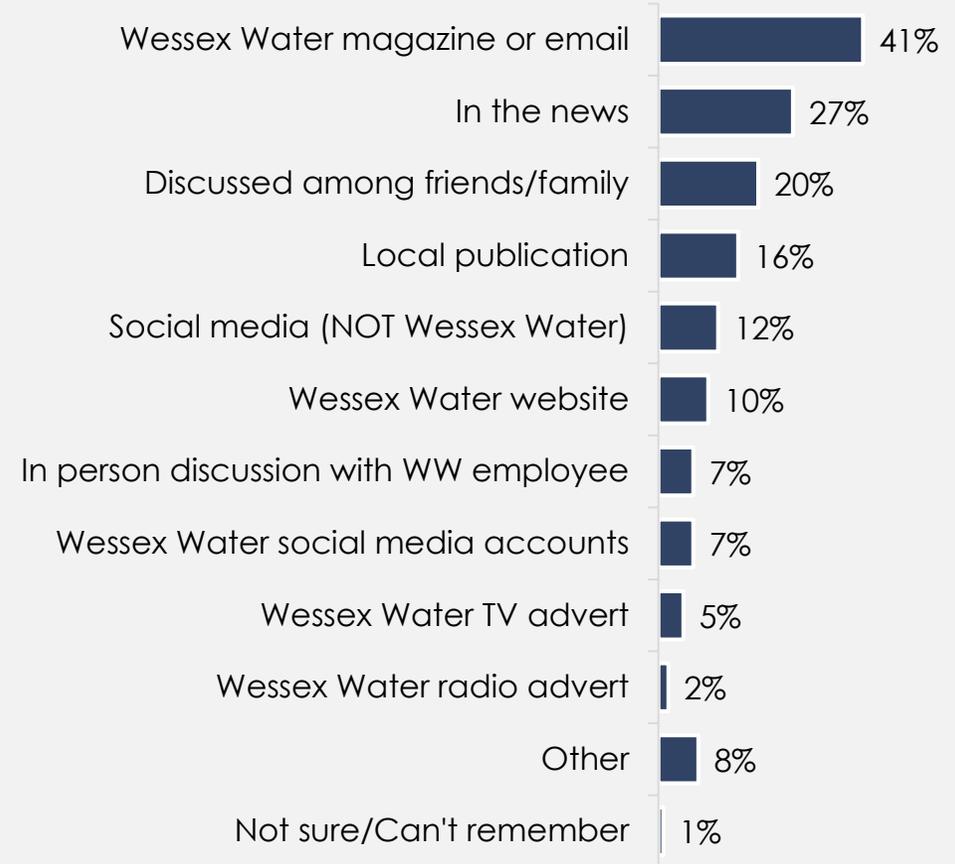
QF1g. Have you heard or seen any information about what Wessex Water is doing to reduce storm overflows into rivers or the sea?

Base: All respondents



QF1h And where did you hear about this topic?

Base: All aware of Wessex Water activity to reduce CSOs (67)

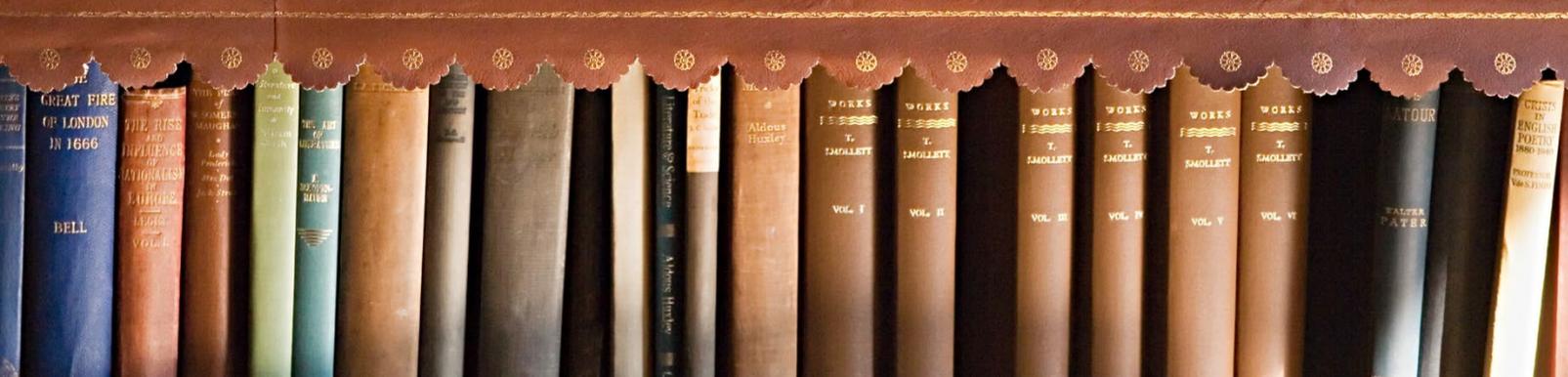




D



E



Appendix



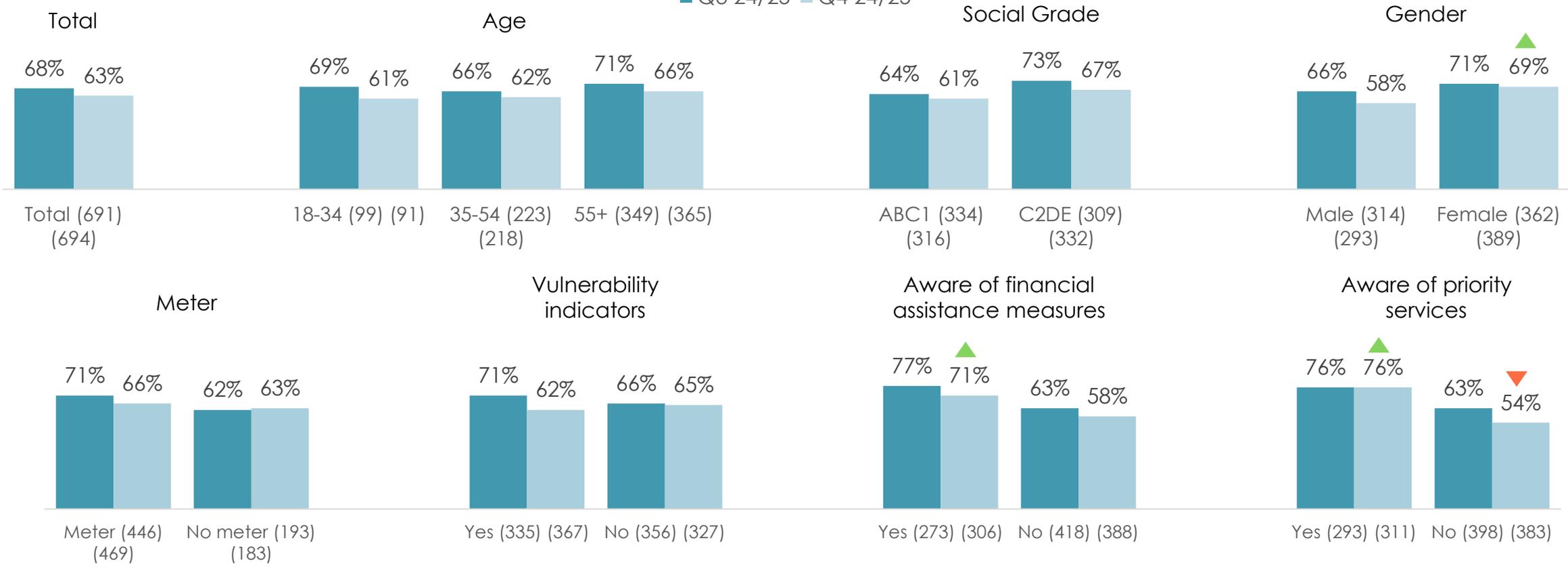
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Overall satisfaction with Wessex Water - by key groups Q4 2024/2025.

Those aware of financial assistance measures or priority services are the most satisfied with Wessex Water.

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

■ Q3 24/25 ■ Q4 24/25

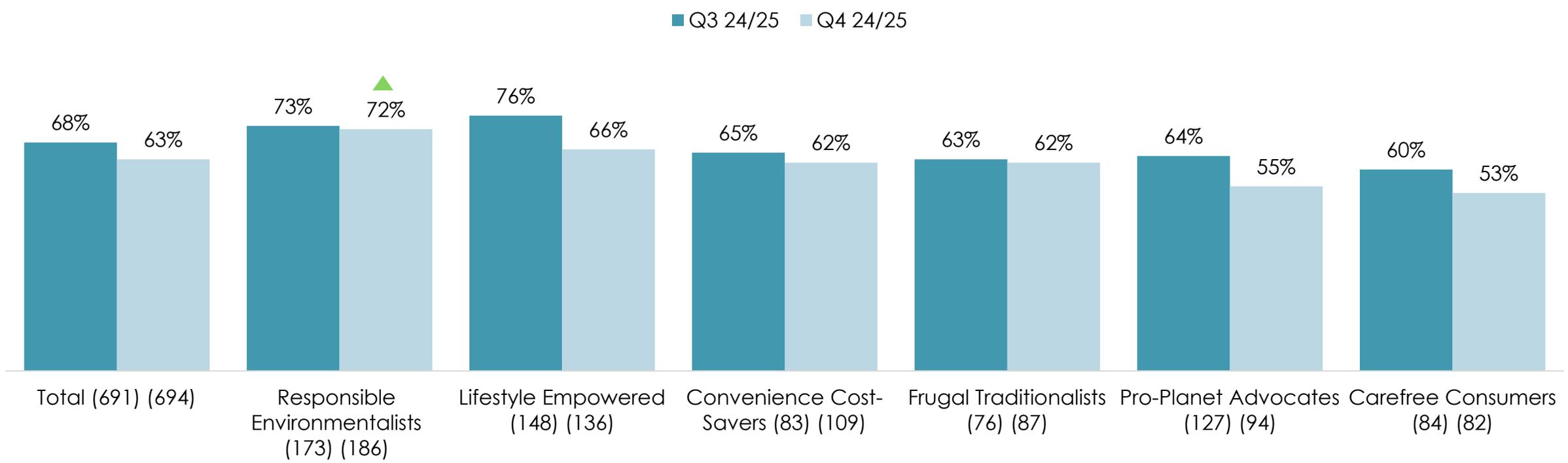


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Overall satisfaction with Wessex Water - by segments Q4 2024/2025.

'Responsible Environmentalists' have a significantly higher level of satisfaction than other segments. Satisfaction drops notably for 'Lifestyle Empowered', 'Pro-Planet Advocates' and 'Carefree Consumers' this Quarter.

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

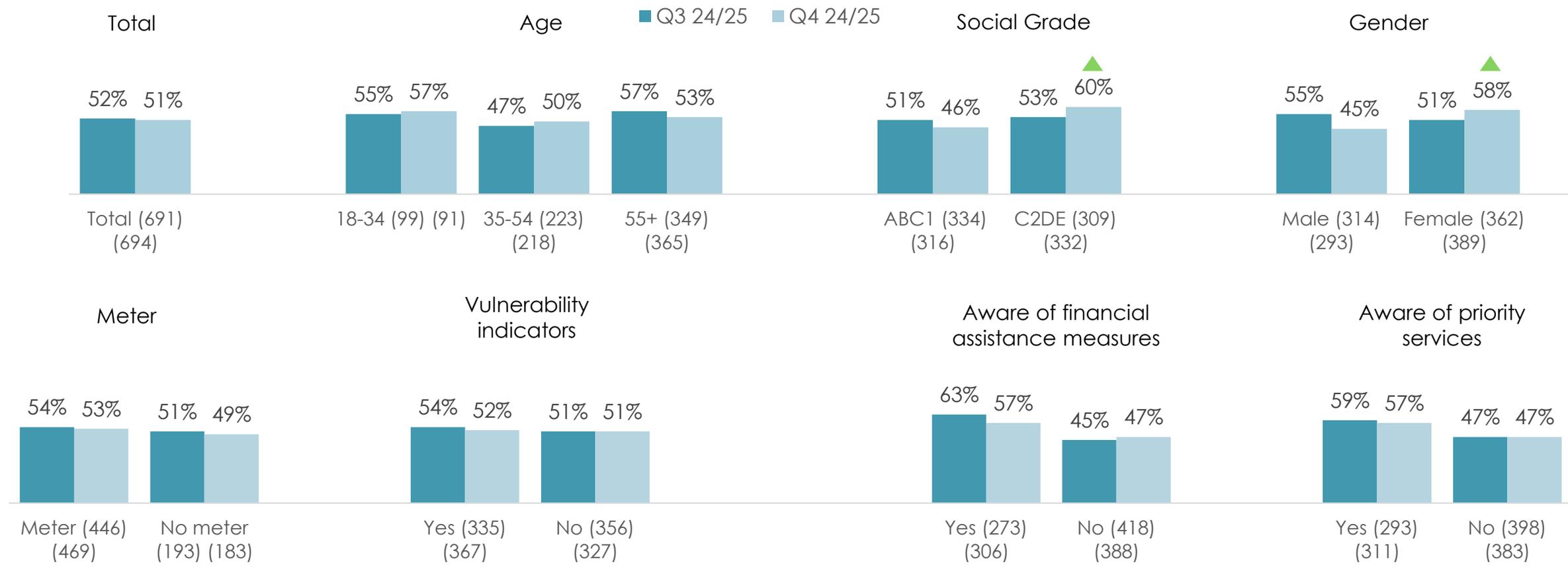


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Satisfaction with value for money - by key groups Q4 2024/2025.

Satisfaction with value for money is significantly higher this Quarter among female customers and C2DE social grade customers.

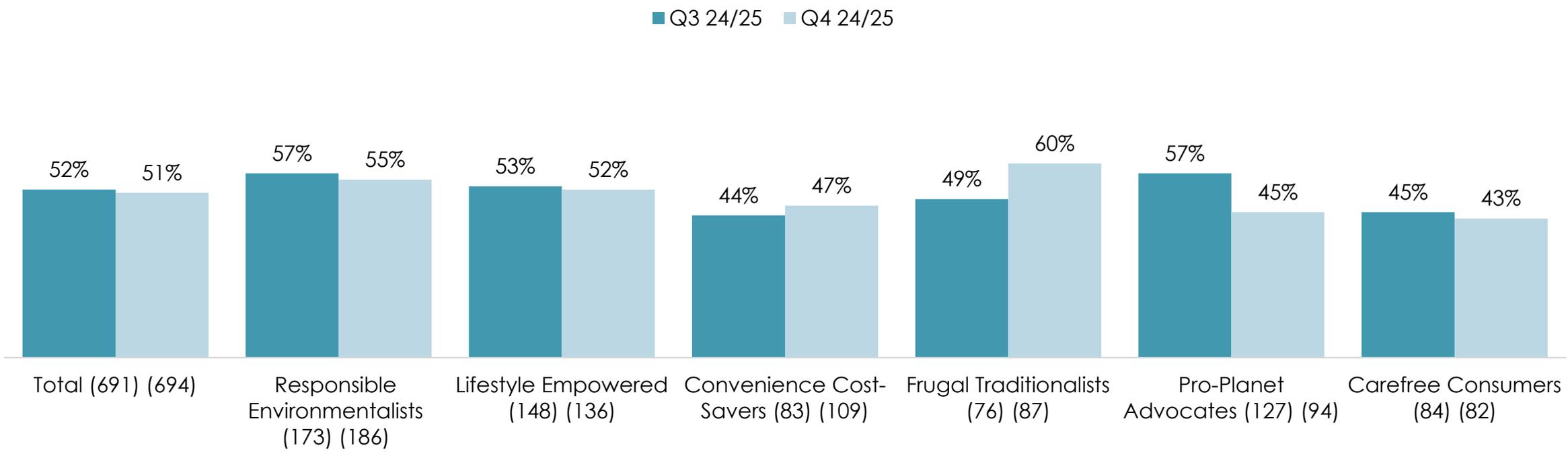
Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? (% Rate Very/fairly satisfied)



Satisfaction with value for money - by segments Q4 2024/2025.

There are no significant differences in satisfaction with value for money scores by segment.

Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? (% Rate Very/fairly satisfied)

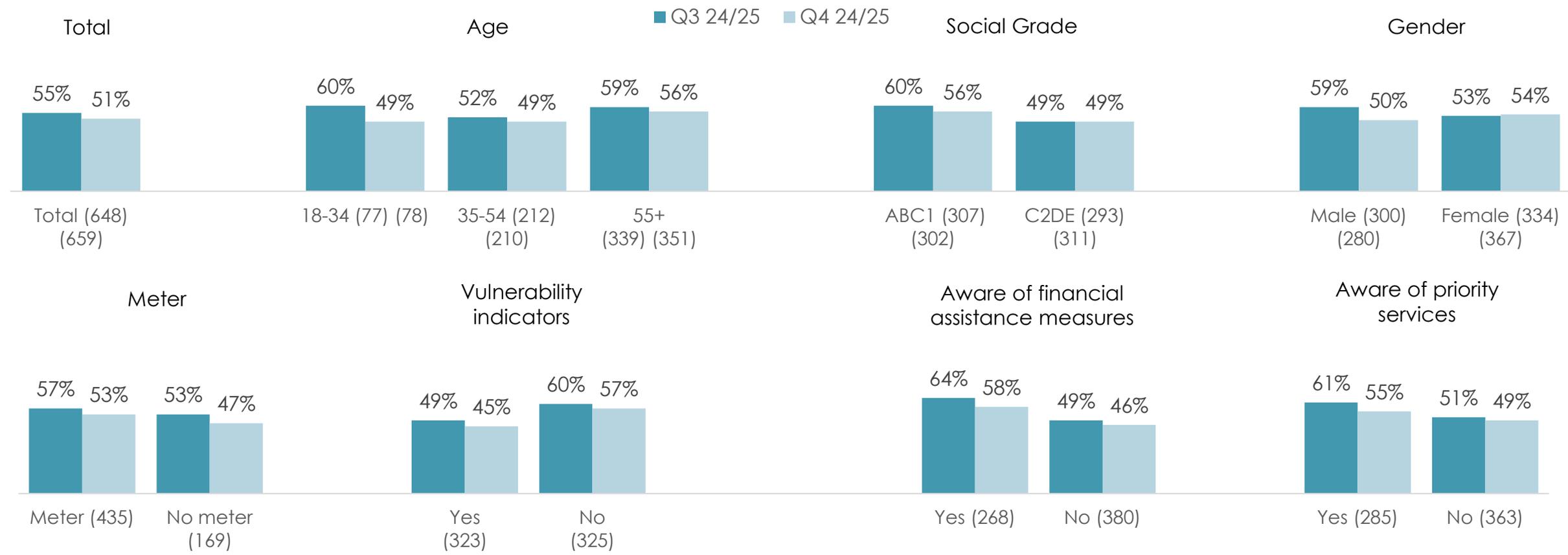


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Bill affordability - by key groups Q4 2024/2025.

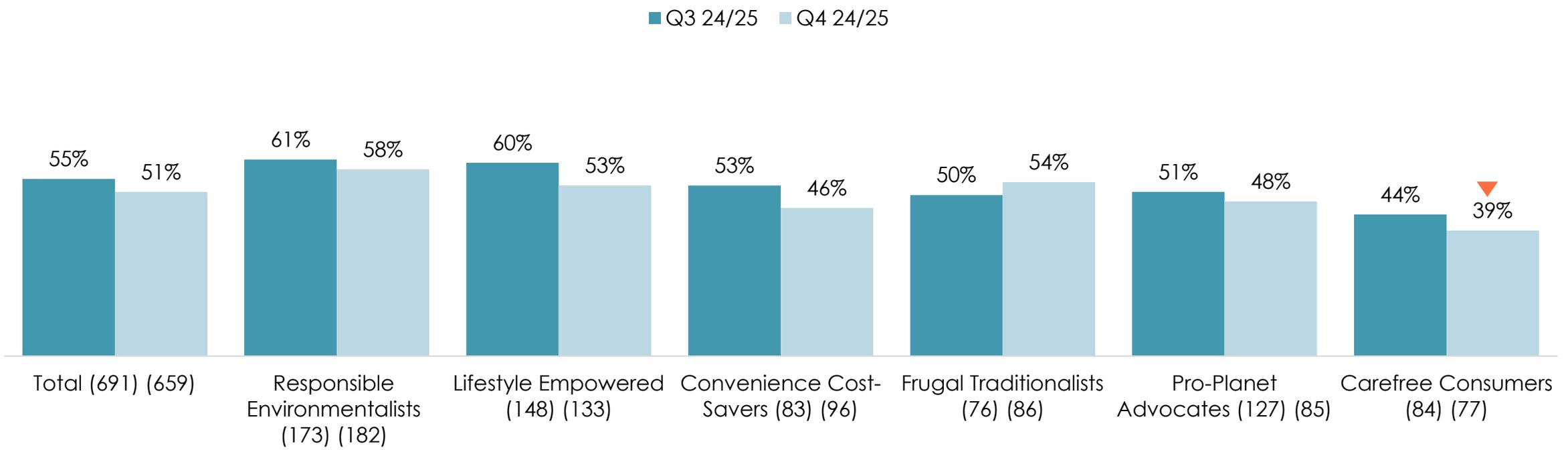
No significant differences between subgroups (vs the total) in terms of the proportion that agree that the water/sewerage charges are affordable to them.

Q17. How much do you agree or disagree: "The total water and sewerage charges that you pay are affordable to you"?
(% Strongly/tend to agree)



Between segments, 'Carefree Consumers' are significantly less positive (versus total) about the affordability of their charges.

Q17. How much do you agree or disagree: "The total water and sewerage charges that you pay are affordable to you"?
 (% Strongly/tend to agree)



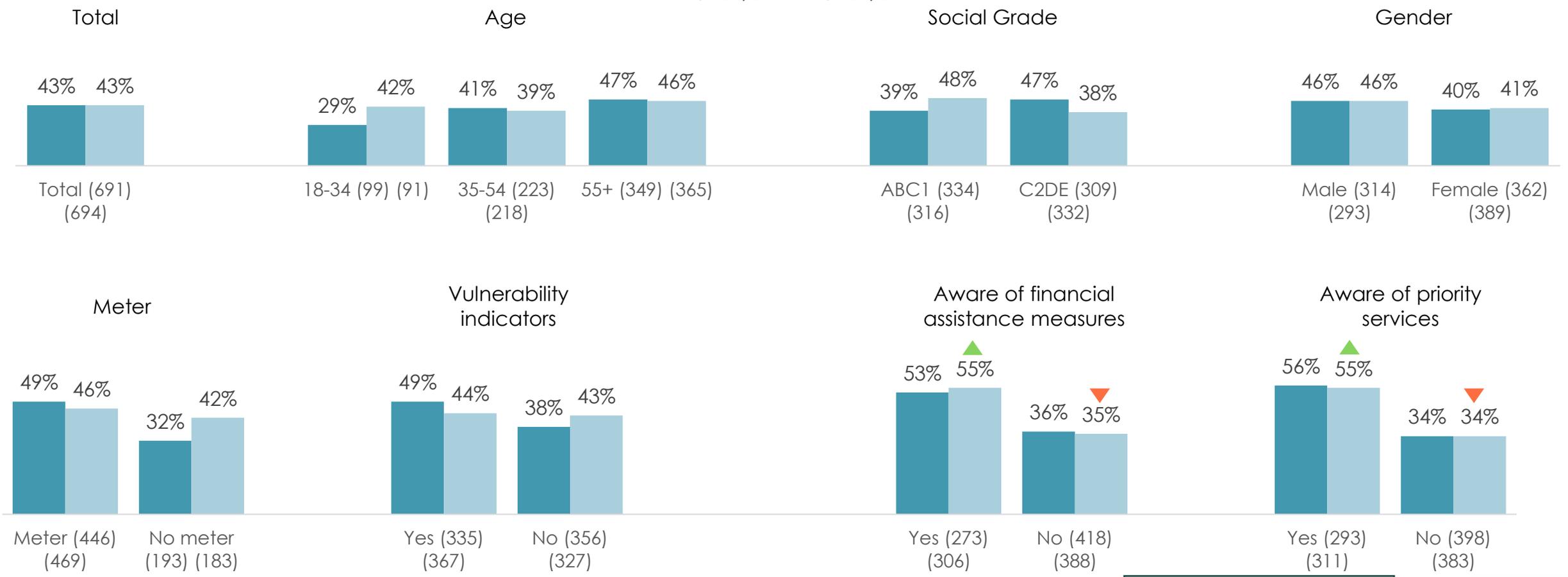
▲ Sig higher than Q4 total
 ▼ Sig lower than Q4 total

Knowledge about Wessex Water - by key groups Q4 2024/2025.

Awareness of financial assistance measures and priority services appear as a key indicator of knowledge about Wessex Water.

Q6. How much do you agree or disagree: "How much do you feel you know about Wessex Water and what they do?" (% A fair amount/a lot)

■ Q3 24/25 ■ Q4 24/25

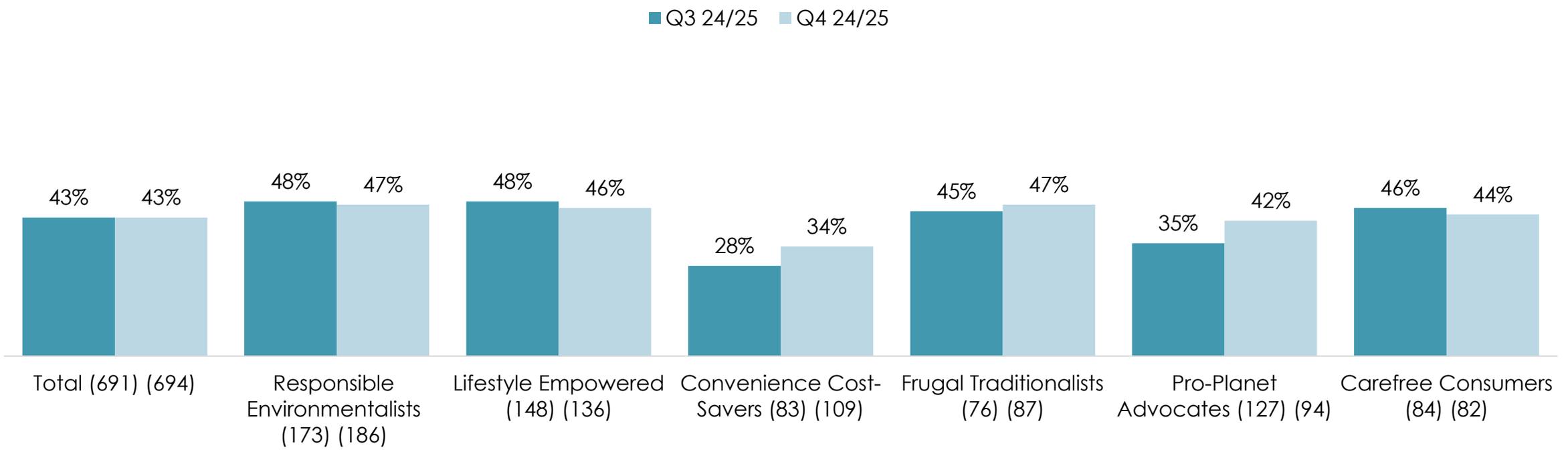


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Knowledge about Wessex Water - by segments Q4 2024/2025.

There are no significant differences in knowledge about Wessex Water by segment.

Q6. How much do you agree or disagree: “How much do you feel you know about Wessex Water and what they do?”
 (% A fair amount/a lot)

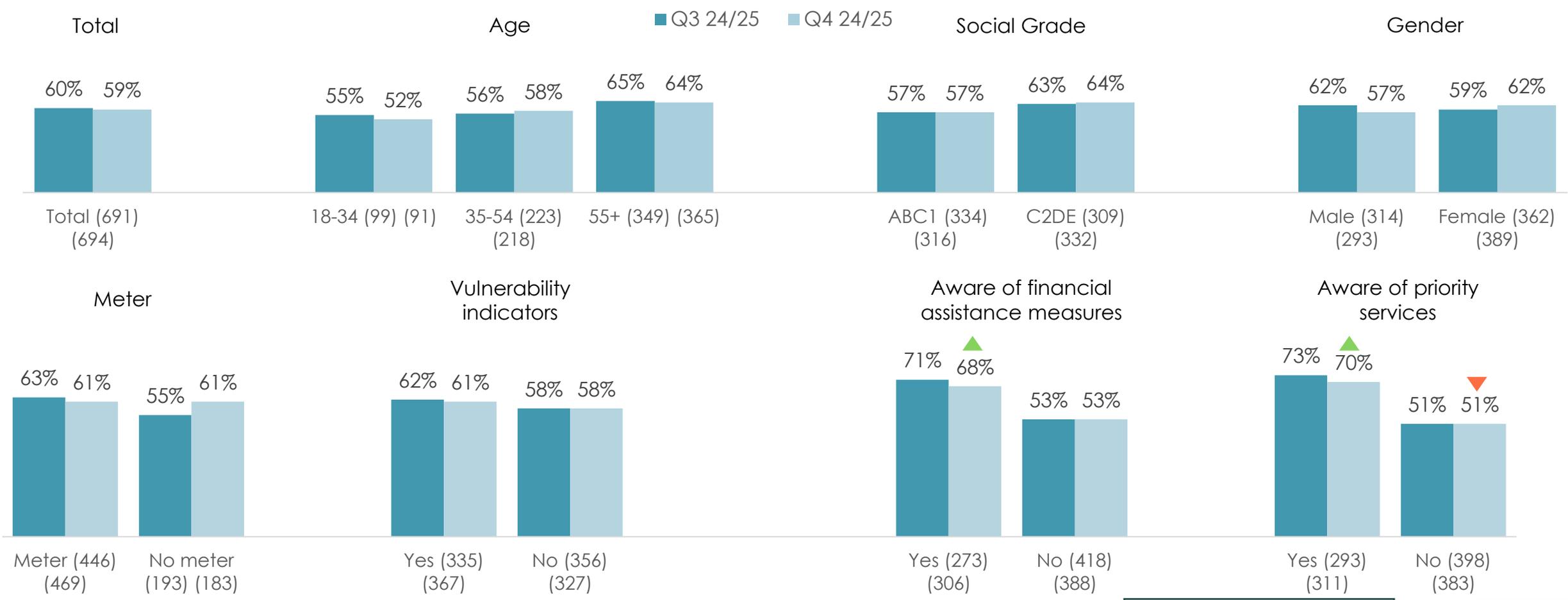


▲ Sig higher than Q4 total
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Opinions of Wessex Water - by key groups Q4 2024/2025.

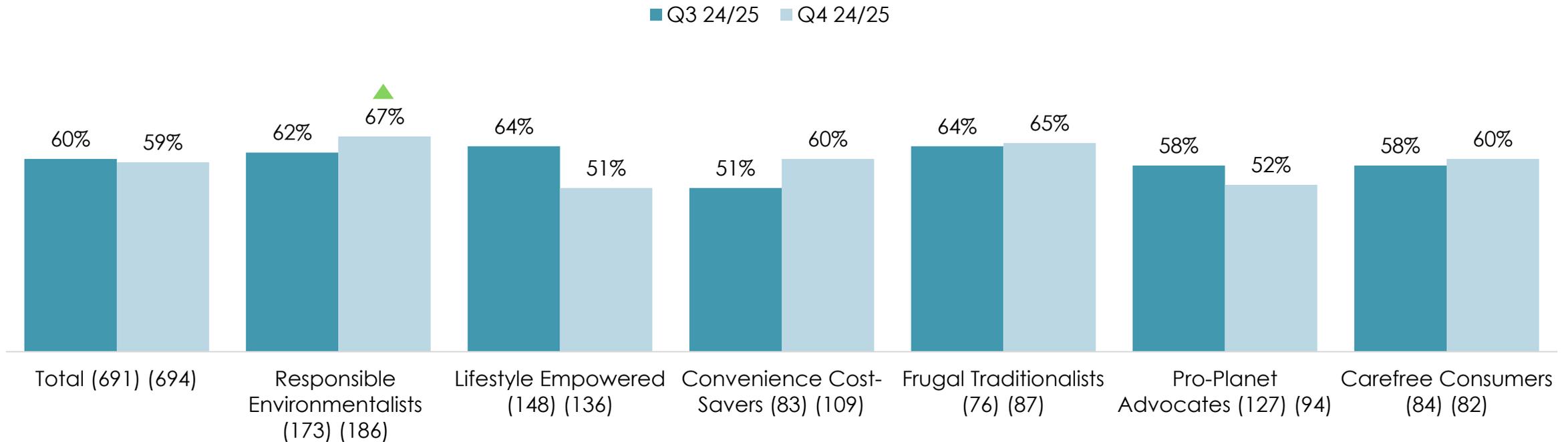
Those aware of Wessex Water's financial assistance measures and those aware of priority services have a significantly more positive sentiment towards Wessex Water compared to total.

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



'Responsible Environmentalists' have the most positive view of Wessex Water; significantly higher than the total.

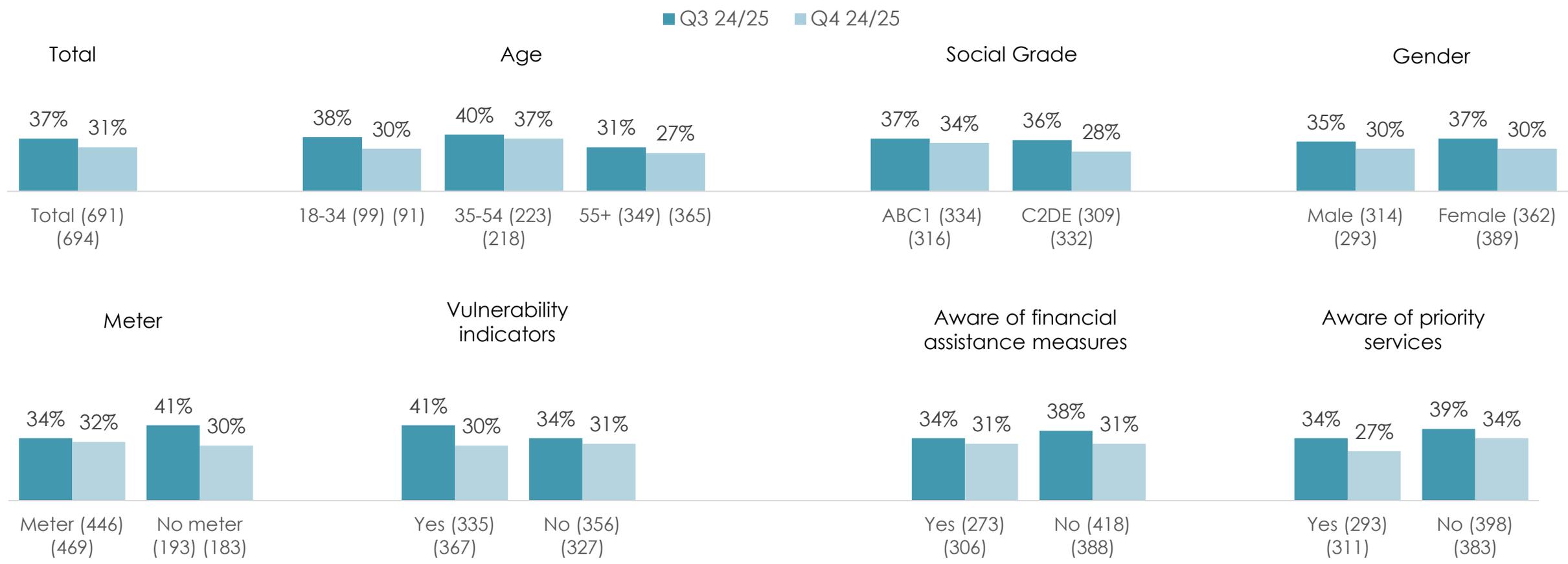
Q4. Now thinking about Wessex Water. Please tell how do you feel about them overall? (% Fairly/very positive)



Impressions of water quality - by key groups Q4 2024/2025.

No significant differences between the subgroups (vs the total) in terms of the proportion who think that the water quality in their region is poor.

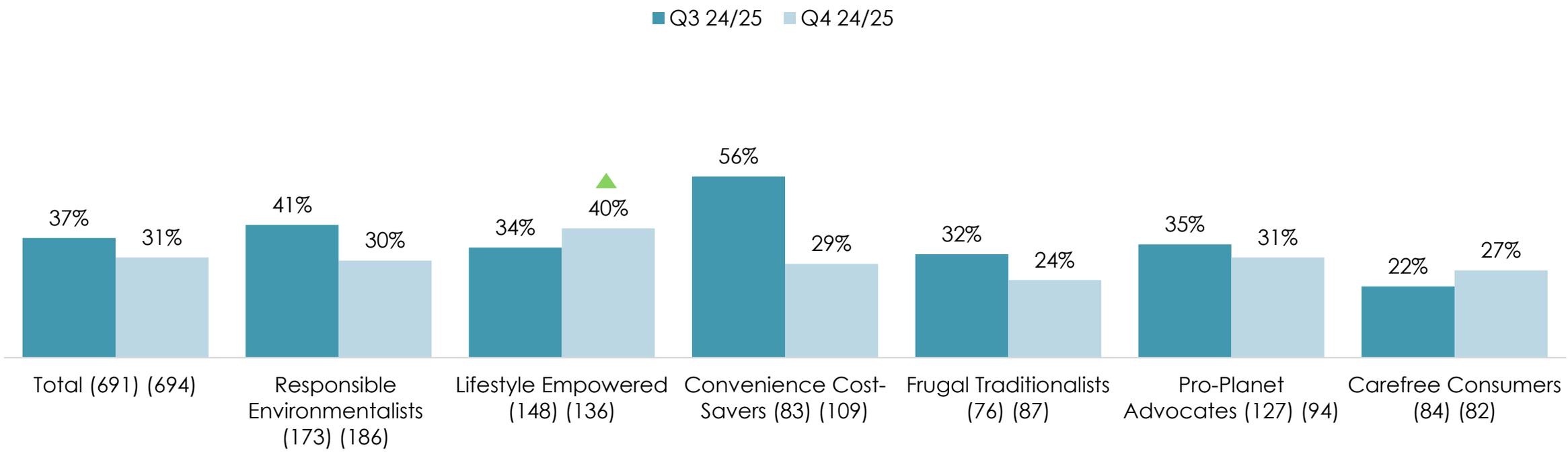
QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality? (% Poor)



Impressions of water quality - by segments Q4 2024/2025.

The 'Lifestyle Empowered' customer segment is significantly more likely than the total to feel that the water quality in their region is poor. 'Convenience Cost-Savers' return to average after the significant spike last Quarter.

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

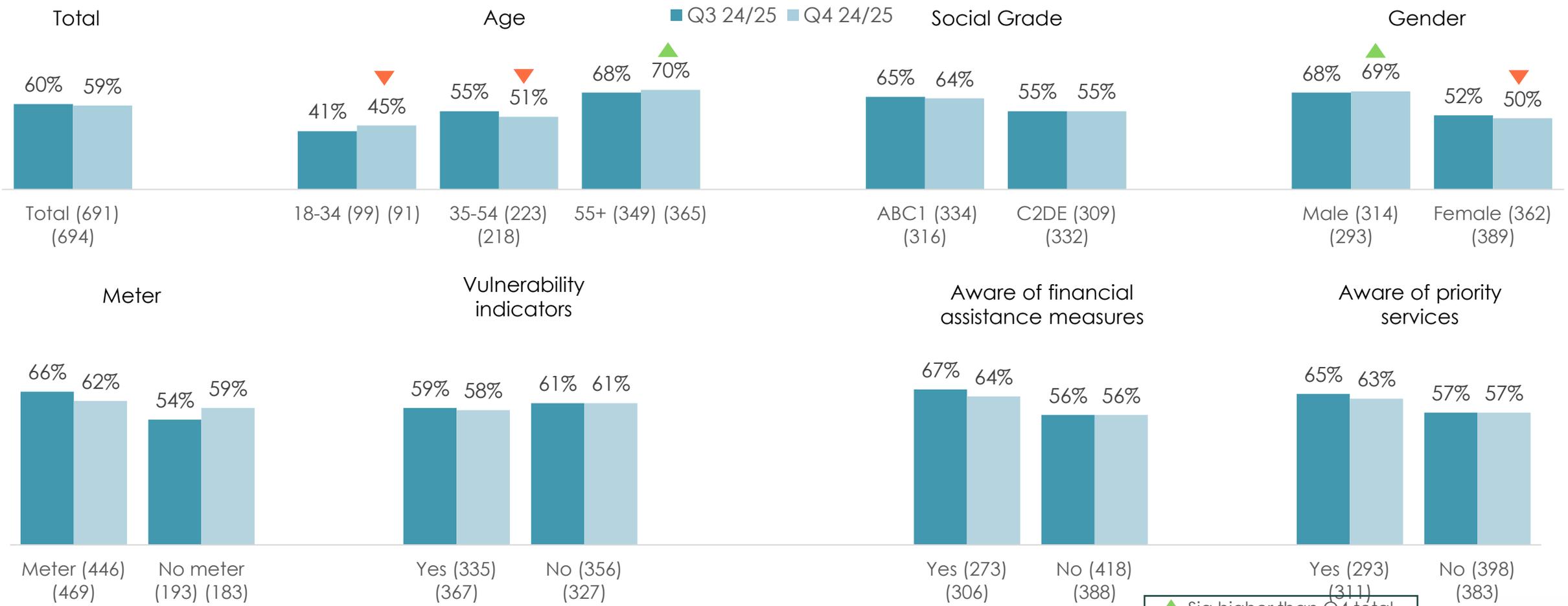


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Awareness of Storm Overflows - by key groups Q4 2024/2025.

Age and gender are the key subgroups with significant differences in awareness of storm overflow releases, compared to total.

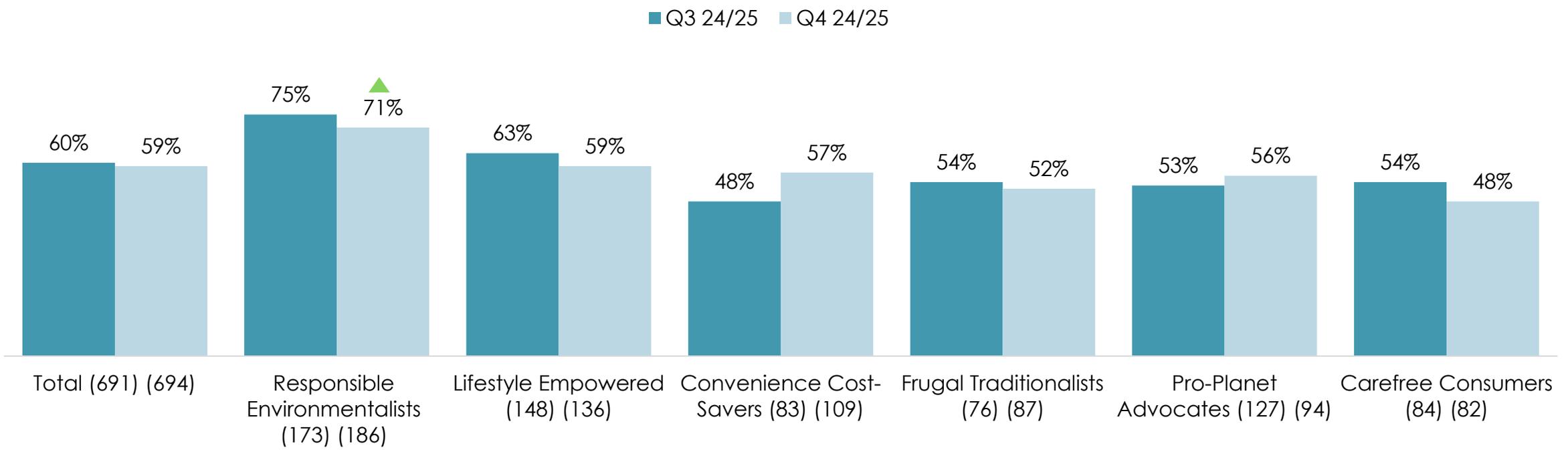
QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?
(% Aware(yes))



▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

'Responsible Environmentalists' are significantly more likely to be aware of storm overflow releases, versus the total.

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



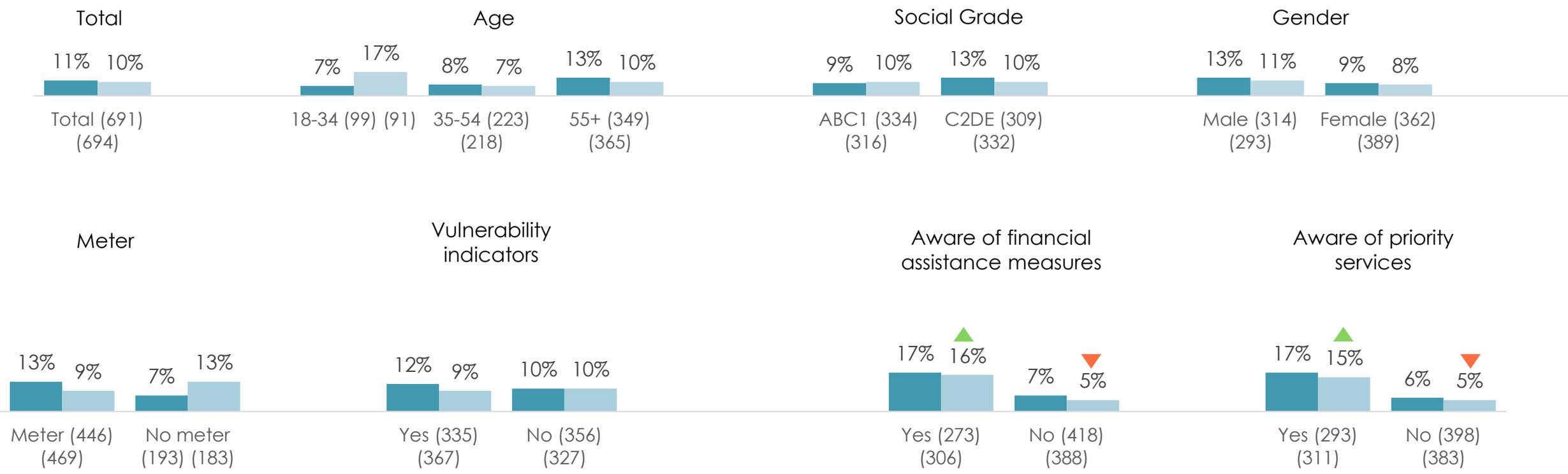
▲ Sig higher than Q4 total
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Awareness of Wessex Water's activity to reduce Storm Overflows - by key groups Q4 2024/2025.

Customers who are aware of financial assistance or the priority services are more likely to have seen information about Wessex Water's efforts to reduce storm overflows (versus the average).

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

■ Q3 24/25 ■ Q4 24/25

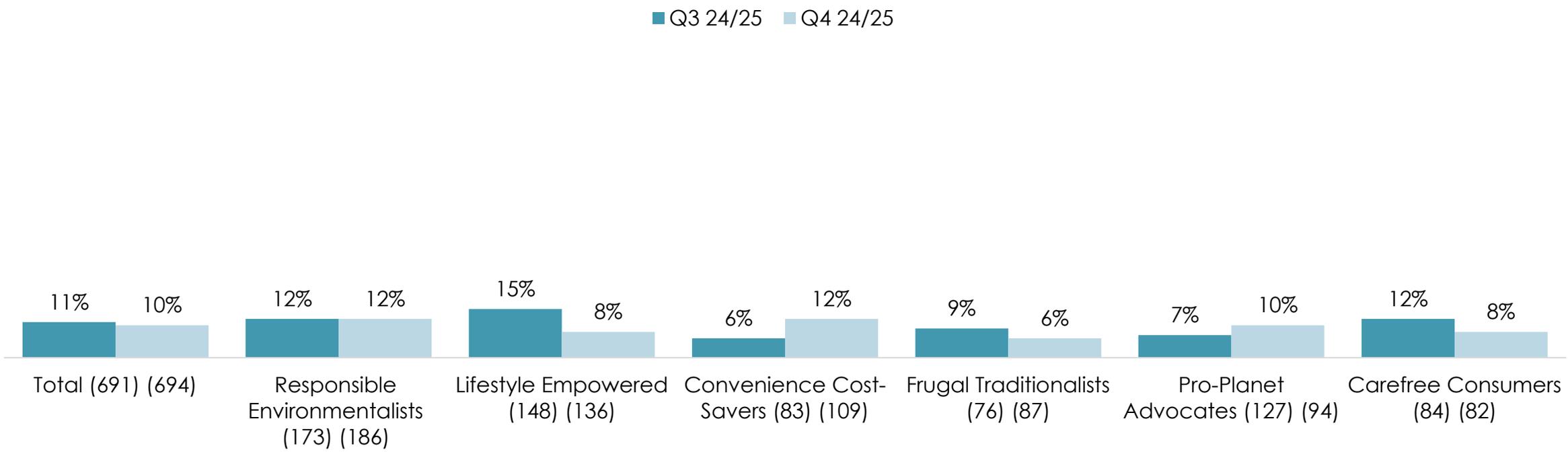


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Awareness of Wessex Water's activity to reduce use of Storm Overflows - by segment Q4 2024/2025.

There are no significant differences by segment (versus total) in awareness of Wessex Water's efforts to reduce storm overflows.

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

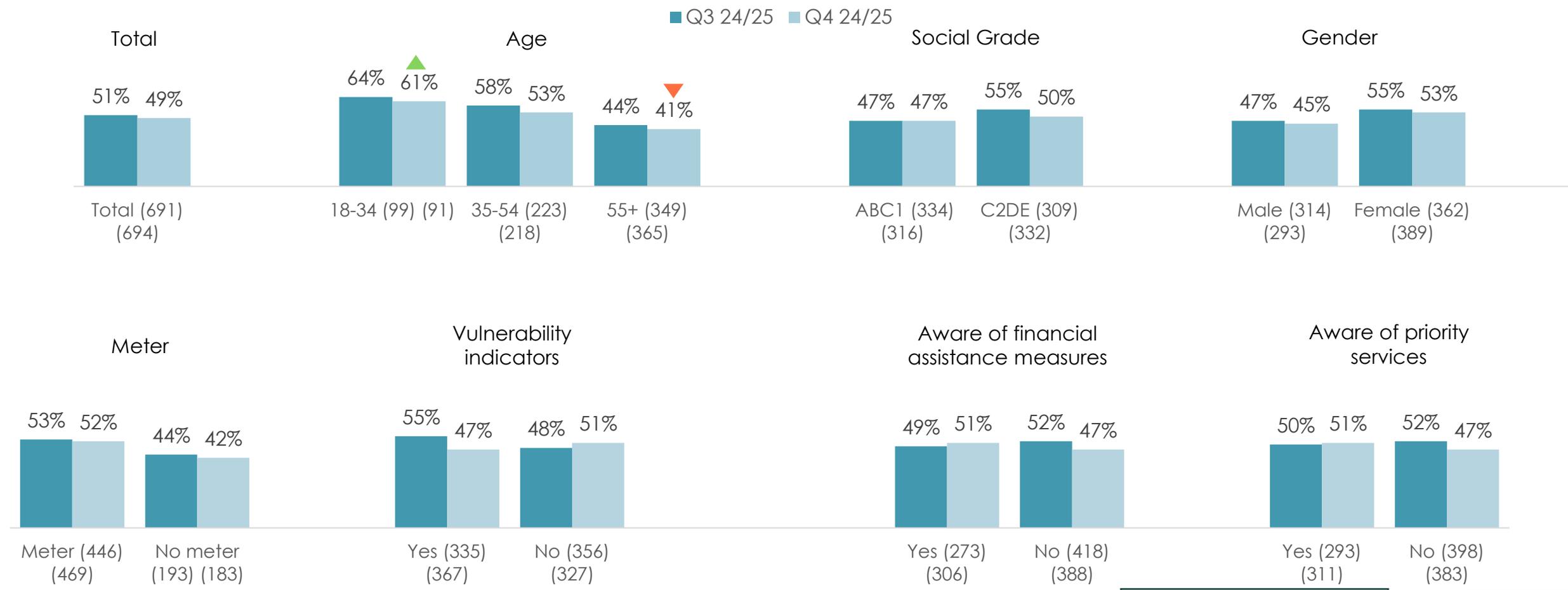


▲ Sig higher than Q4 total
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Interest in the benefits of smart meters - by key groups Q4 2024/2025.

Under 35s are significantly more likely to be interested in the benefits of smart water meters, with those aged 55+ significantly less interested.

QF1. How much would you agree or disagree with the following statements? : "I'd be interested in having more frequent updates on how much water I'm using and how much it is costing"
 (% Strongly/tend to agree)



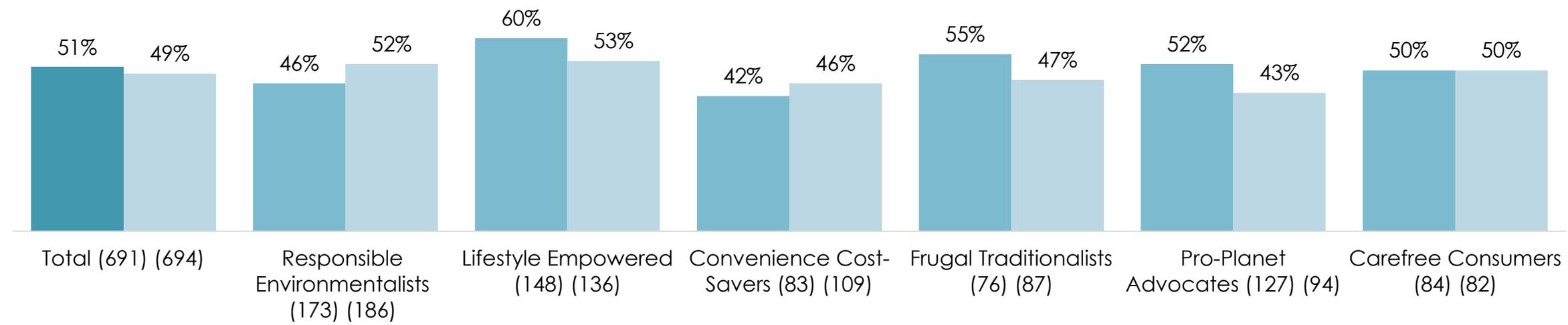
Interest in the benefits of smart meters - by segments Q4 2024/2025.

There are no significant differences (versus the total) in terms of interest in the benefits of smart water meters.

QF1. How much would you agree or disagree with the following statements? : "I'd be interested in having more frequent updates on how much water I'm using and how much it is costing"

(% Strongly/tend to agree)

■ Q3 24/25 ■ Q4 24/25



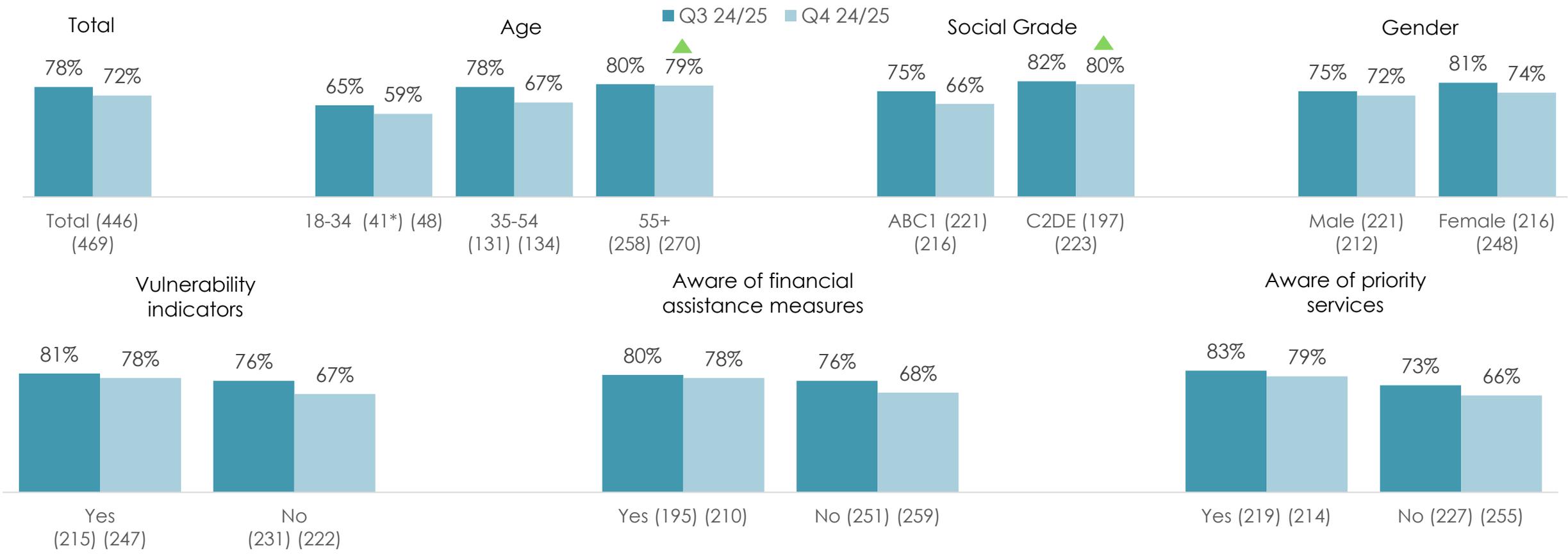
▲ Sig higher than Q4 total
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Managing water use to keep bills down - by key groups Q4 2024/2025.

Those aged 55+ and those C2DE are significantly more likely than the total to agree that they manage their water use to keep bills down.

QF1. How much would you agree or disagree with the following statements? : "I manage my water use to keep the water bill down"

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

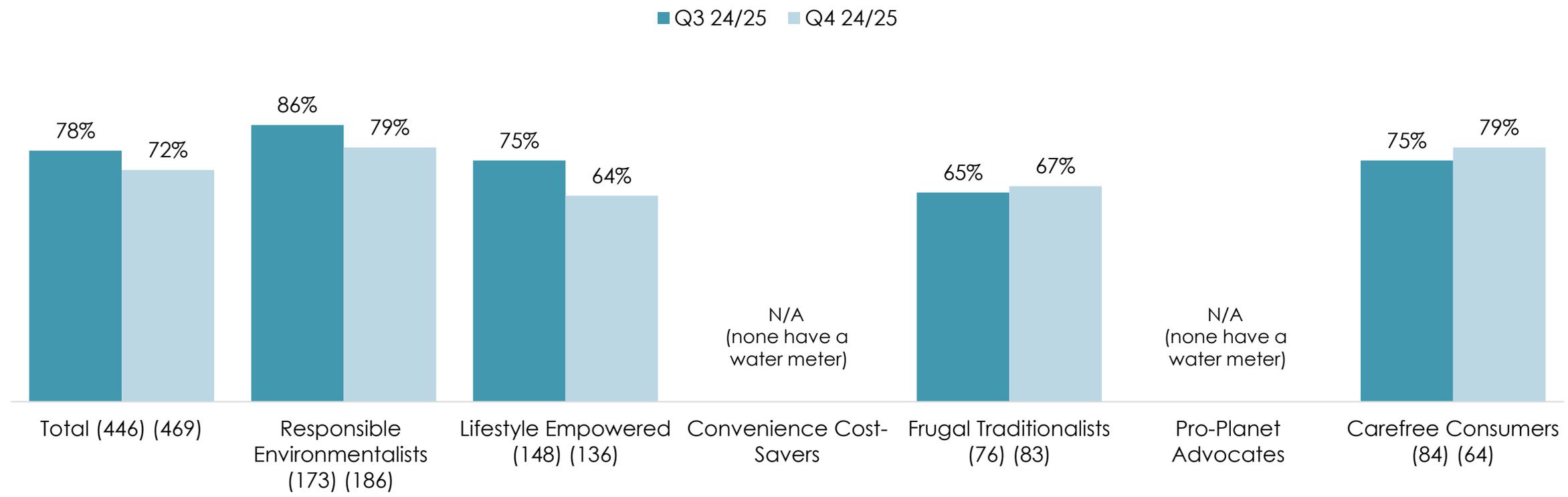


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Managing water use to keep bills down - by segments Q4 2024/2025.

There are no significant differences between segments regarding managing water use to keep bills down.

QF1. How much would you agree or disagree with the following statements? : “I manage my water use to keep the water bill down”
 (% Strongly/tend to agree, among those who have a water meter)

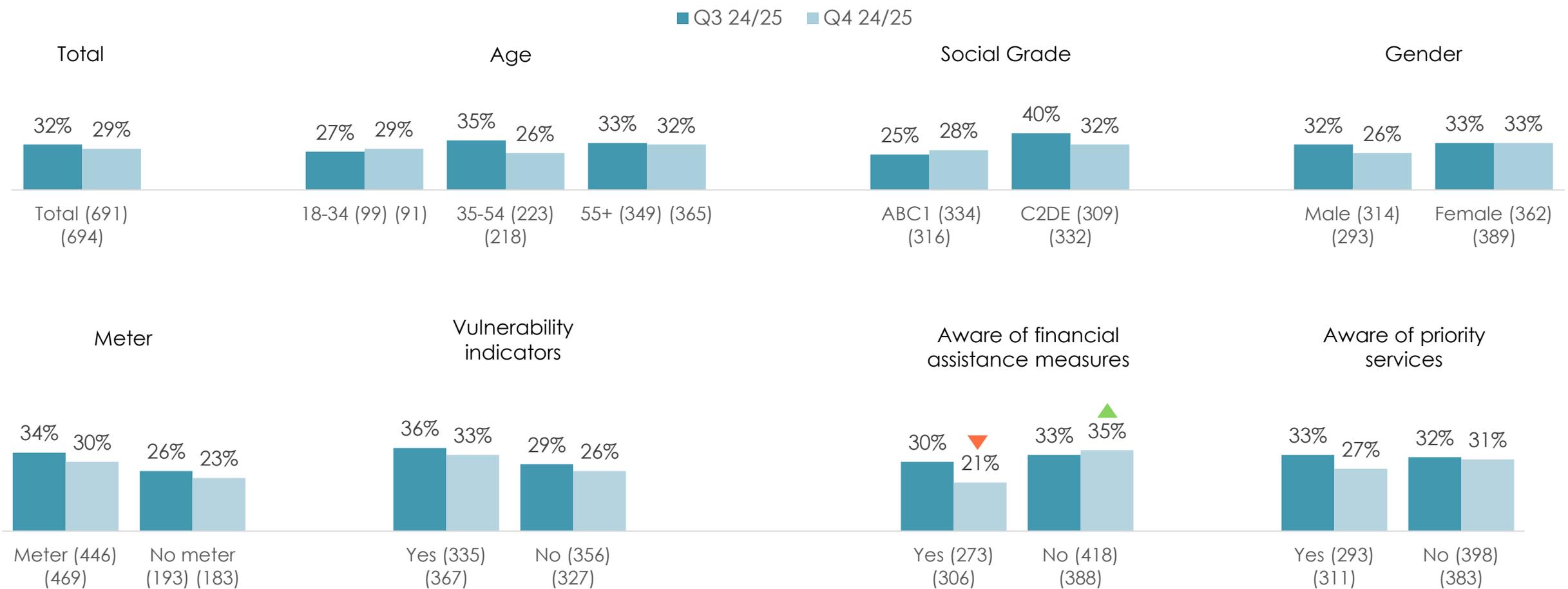


▲ Sig higher than Q4 total
 ▼ Sig lower than Q4 total

Reducing water use - by key groups Q4 2024/2025.

Awareness of financial assistance measures is a key indicator of the knowledge customers have about reducing their water usage.

QF1. How much would you agree or disagree with the following statements? : “I’m not sure how I can reduce my household’s water use”
 (% Strongly/tend to agree)



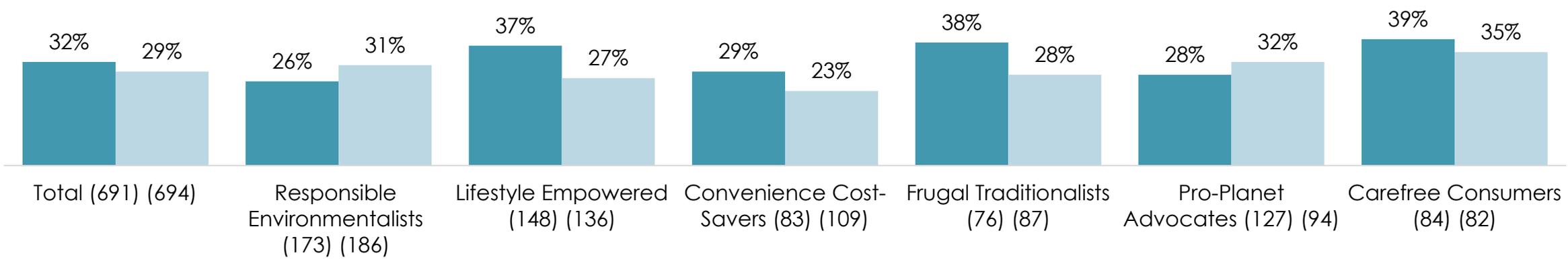
Reducing water use - by segments Q4 2024/2025.

No significant difference between segments (vs the total) in the proportion who agree that they are not sure how to reduce their water use.

QF1. How much would you agree or disagree with the following statements? : "I'm not sure how I can reduce my household's water use"

(% Strongly/tend to agree)

■ Q3 24/25 ■ Q4 24/25

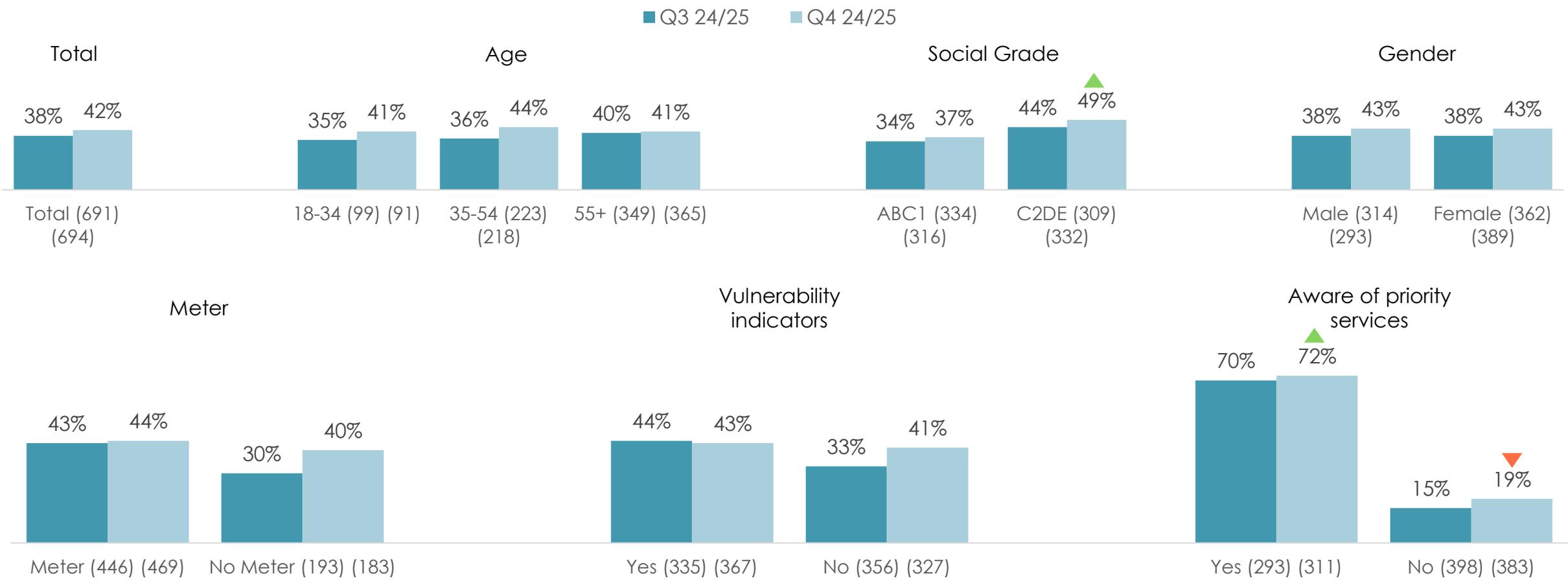


▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

Awareness of financial aid provided by Wessex Water - by key groups Q4 2024/2025.

Those aware of priority services and C2DE customers are significantly more likely to be aware of financial assistance provided by Wessex Water.

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



▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

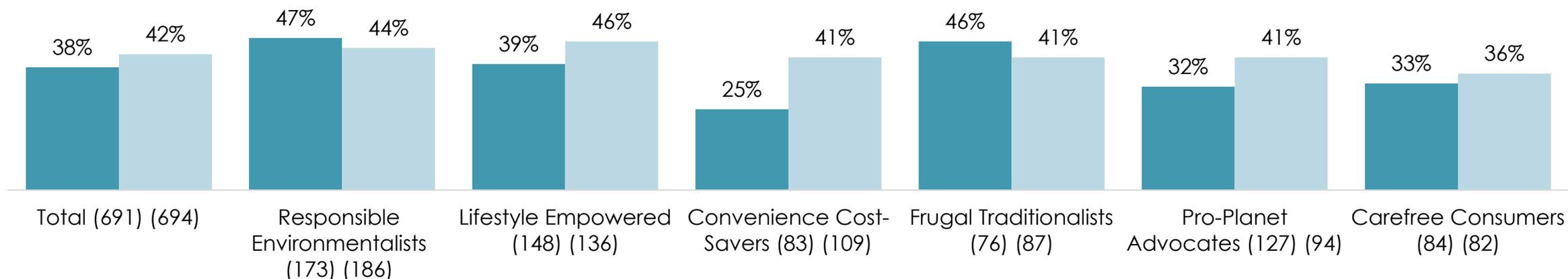
Awareness of financial aid provided by Wessex Water - by segments Q4 2024/2025.

There are no significant differences for any segments in terms of awareness of the financial assistance provided by Wessex Water.

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

(% Yes)

■ Q3 24/25 ■ Q4 24 /25



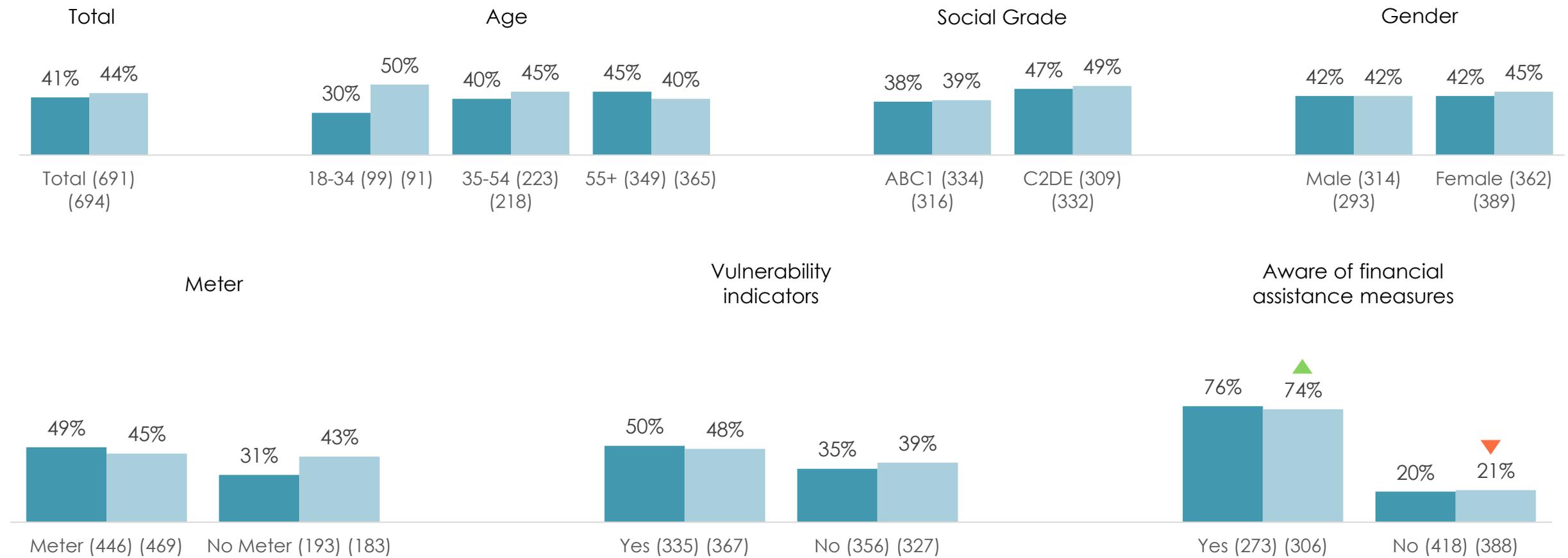
Awareness of priority services provided by Wessex Water - by key groups Q4 2024/2025.

Those who are aware of financial assistance measures are significantly more likely to also be aware of priority services, and vice versa.

Q20r2. Are you aware of Wessex Water doing any of the following? : "Providing priority services for customers who need them, such as braille or extra support during a supply interruption."

(% Yes)

■ Q3 24/25 ■ Q4 24/25



▲ Sig higher than Q4 total
▼ Sig lower than Q4 total

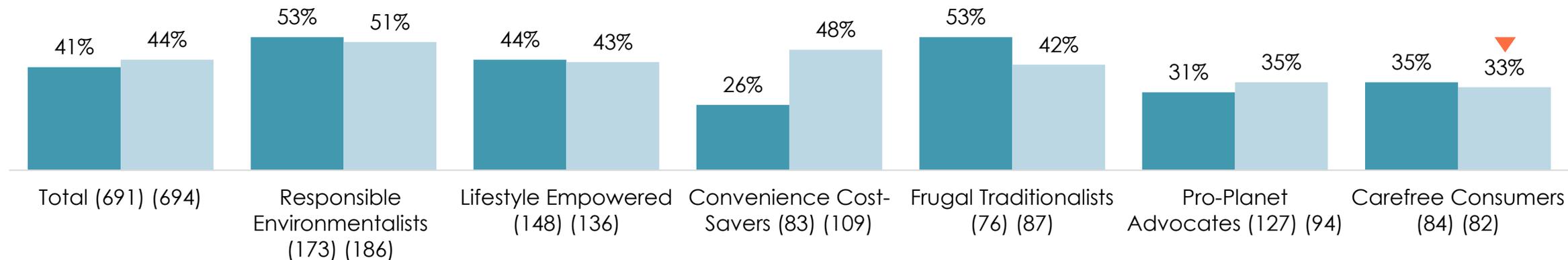
Awareness of priority services provided by Wessex Water - by segments Q4 2024/2025.

'Carefree Consumers' are significantly less likely than average to be aware of financial assistance provided by Wessex Water

Q20r2. Are you aware of Wessex Water doing any of the following? : "Providing priority services for customers who need them, such as braille or extra support during a supply interruption."

(% Yes)

■ Q3 24/25 ■ Q4 24/25





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