



Image Tracker

2023/4 Annual presentation

May 2024



Context

Performance

Trust

Storm overflows

Water use

Communication

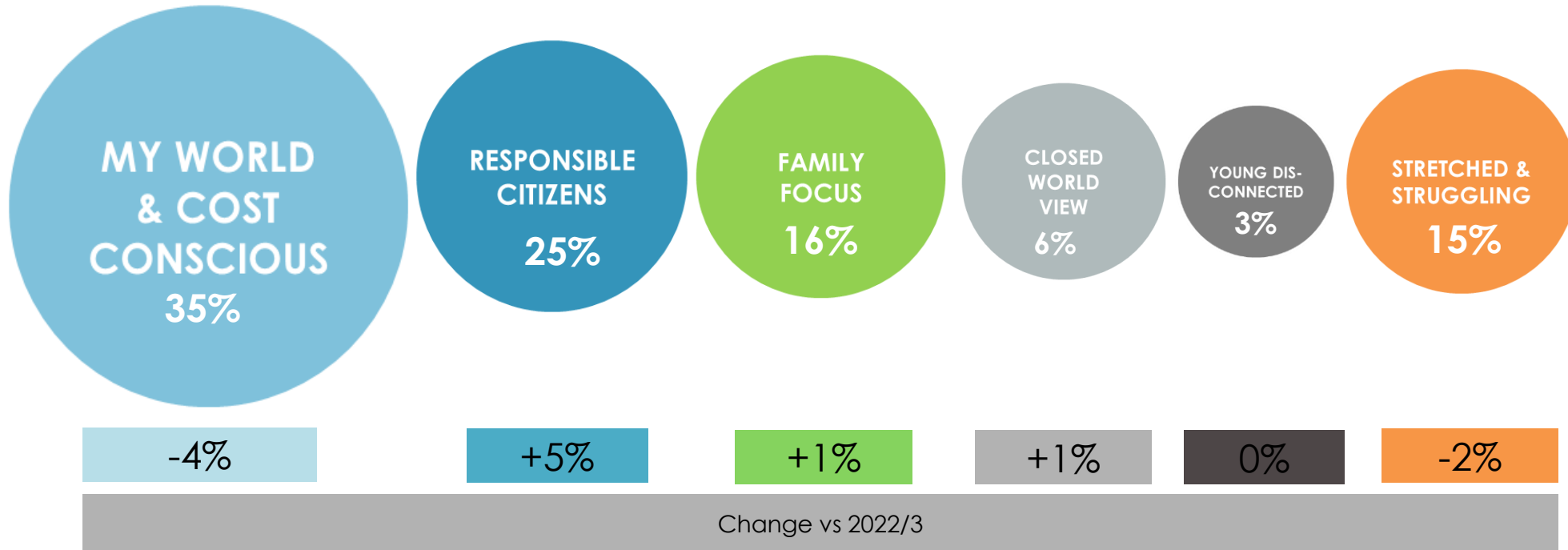
Customers are assigned into one of 6 segments

The segments are based on responses to three questions:

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

The segments vary noticeably in size, with the largest (My World & Cost Conscious) being about 8 times the size of the smallest (Young Disconnected).

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



% of all Wessex Water customers in each segment – 2023/4

Base: All bill payers (823)

Demographic breakdown of key segments 2023/4

More bill-payers are in the lower social grade vs last year, primarily driven by the 'My World Cost Conscious' segment, who are also less likely to rate the charges as affordable vs last year. However, there is greater awareness of financial aid in this segment vs last year too. 'Stretched and Struggling' segment significantly more likely to be aware of financial assistance, suggesting related comms are reaching the right audience.

	Responsible Citizens (204)	My World and Cost Conscious (284)	Family Focus (130)	Closed World View (53*)	Young Disconnected (25**)	Stretched & Struggling (124)
C2DE	36%	46%	39%	49%	23%	54%
Water meter	59%	56%	53%	56%	59%	49%
Any vulnerability	24%	37%	31%	30%	28%	42%
Total charges affordable	87%	52%	60%	79%	80%	51%
Aware of financial assistance	57%	52%	40%	31%	34%	43%

+5% difference vs 2022/3	-5% difference vs 2022/3	Sig higher difference vs 2022/3	Sig lower difference vs 2022/3
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KEY: * Caution low base size ** Caution very low base size.

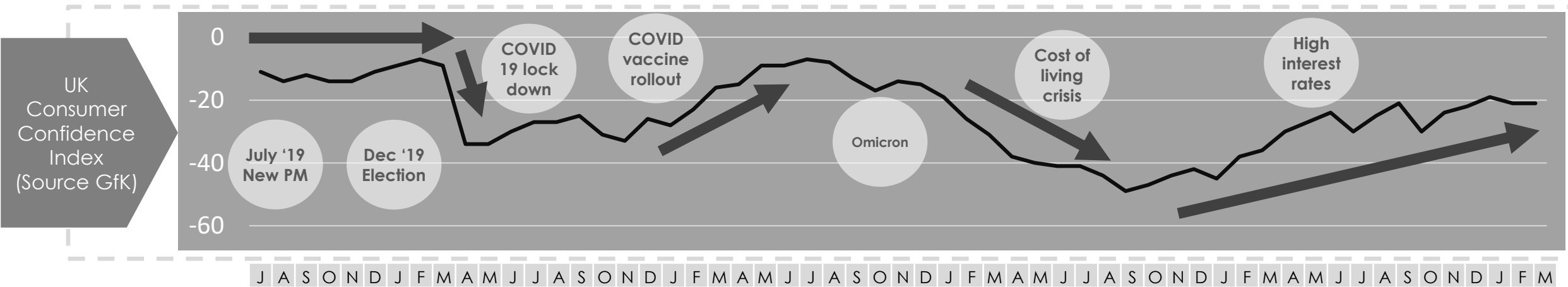


Wider context



Wider context

This year we see continuous growth in consumer confidence. The water industry still under scrutiny by the media, not only about sewage overflows but also profits/billing. UK experienced more storms in late 2023/early 2024.

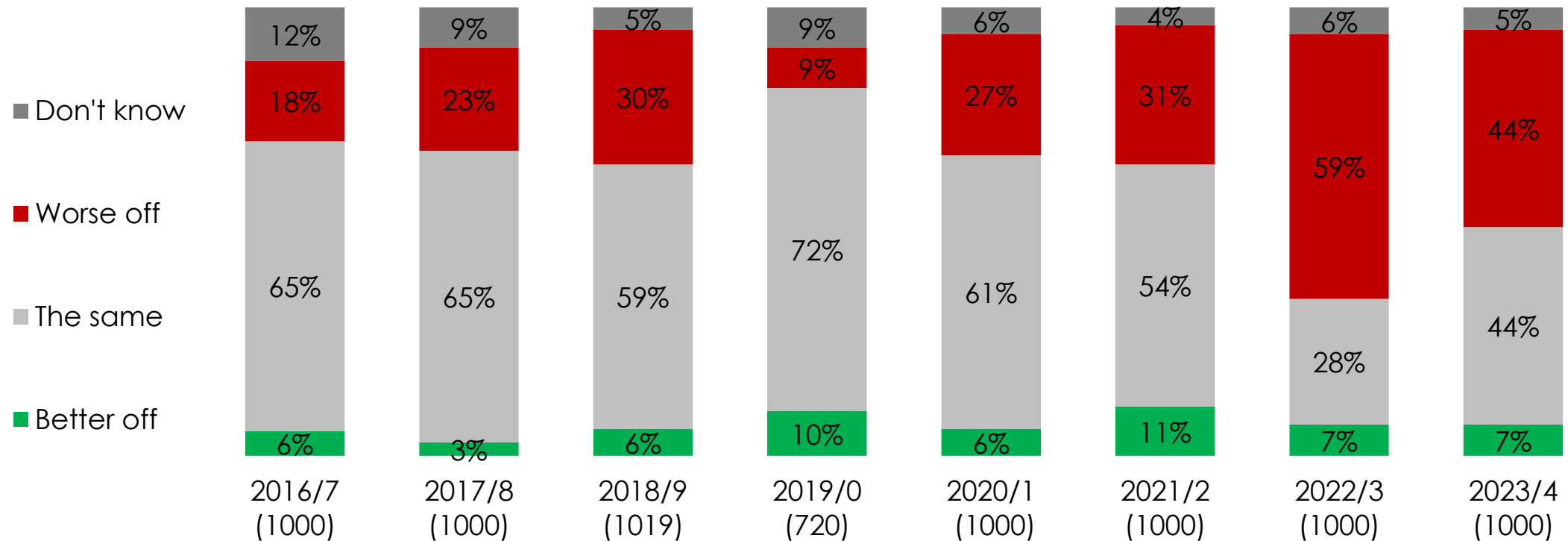


A	M	J	J	A	S	O	N	D	J	F	M
Apr 2023 Inflation dropped from 10.1% to 8.7%. Food price growth remains at 19.1%	7 May Coronation of King Charles	10 Jun Temp reaches over 30c for the first time since Aug 2022	4 July Reports that water companies discharged sewage over 300,000 times in 2022	6 Sept Investigation launched for Thames, Wessex and Southern Water for 'illegal' dry sewage spills	7 Oct Hamas attacks triggering Israeli Palestinian war	1 Nov Storm Ciarán	27 Dec Storm Gerrit	11 Jan Missile strikes in Yemen	2 Feb Water UK says average annual water bill is expected to increase by 6% in England and Wales	12 Mar Thames Water refused to pledge towards Defra initiative	
28 Apr Anglian water fined £2.65 m for sewage disposal into the North Sea	18 May Water UK apologise for sewage overflows and pledge \$10bn investment	23 Jun BoE raises bank rate from 4.5% to 5%- highest for 15 years	July UK economy shrinks by 0.5%	9 Aug Lawsuit against six water companies claims they hid the scale of raw sewage discharges	6 Sept Pound hits three-month low	18 Oct Storm Babet	Nov UK interest rates drop to 3.9%	19 Jan Storm Isha	Feb 2 nd wettest February for Wessex since records began	20 Mar Environment Agency data published that sewage discharge doubled in England in 2023	
			July World's hottest month on record			28 Oct Ofwat annual report flagged the financial health of four water companies	27 Dec Media articles claiming that HH water bills could rise by over £800 in 2024	22 Jan Storm Jocelyn			



Over a year after the national financial downturn in late 2022, significantly fewer customers believe things will get worse in the next 12 months, though levels are still high. Just as many feel things will just stay the same but this is unlikely to be a positive sentiment - it instead reflects the long-term impact of the on-going cost of living crisis.

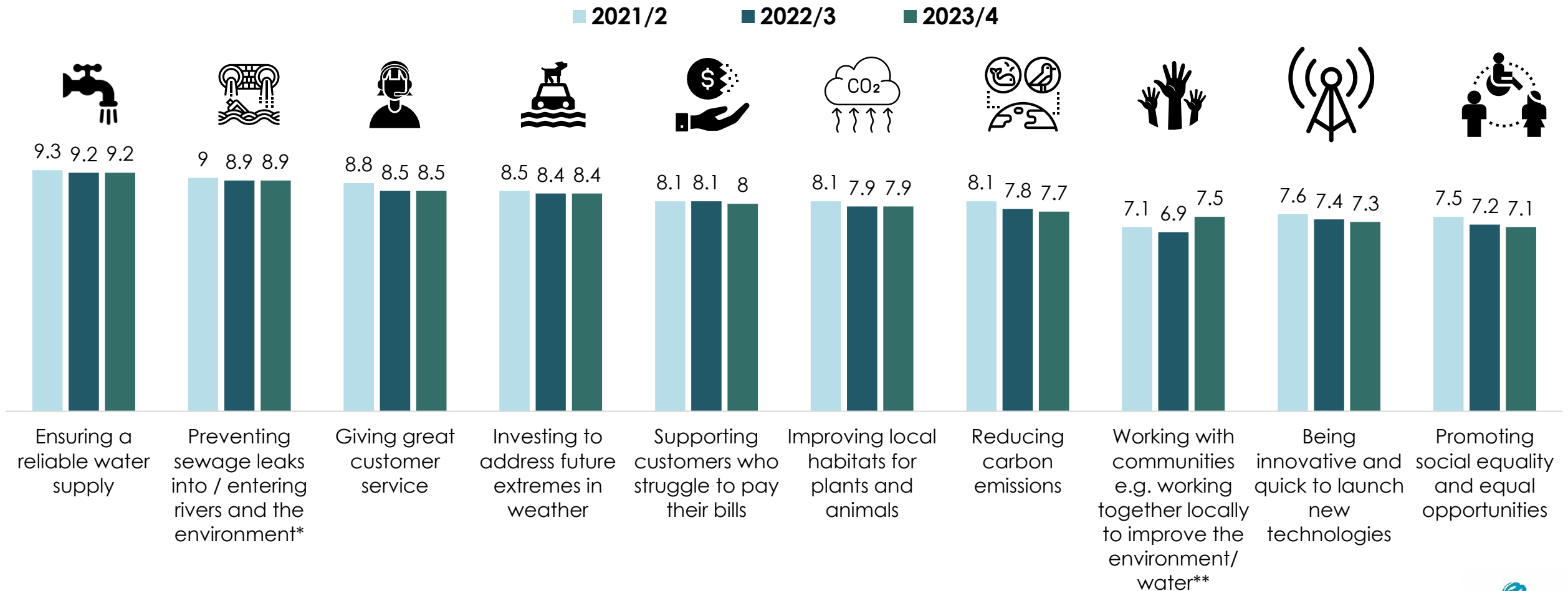
Q11/QF5 Do you expect your household to be better off, worse off or about the same in the next 12 months? Base: All respondents



What do consumers say Wessex Water should focus on?

As in previous years, ensuring a reliable water supply is the biggest priority, closely followed by preventing sewage entering the environment. 'Working with communities' has seen an increase after changing the focus to more specific goals (i.e. improving environment) which suggests this is more in line with Wessex Water customers' expectations.

Q7. How important do you think it is for Wessex Water to focus on each of the following things? Mean score (10 = 'a top priority' 0 = 'not a priority'). Base: All respondents 2021/2 (1000), 2022/3 (1000), 2023/4 (1000)



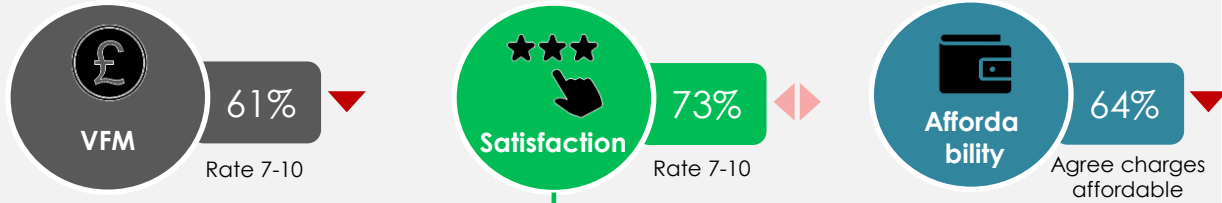
*New wording introduced part way through Q3 2021/2 fieldwork.
** New wording introduced Q2 2023/4 fieldwork.

A close-up, side-view photograph of a person wearing a textured, brown knit sweater. Their hands are positioned over a silver laptop keyboard, which is resting on a wooden desk. The person's left wrist is adorned with a dark, multi-strapped watch. The laptop screen is open and displays some content, though it is out of focus. A semi-transparent teal horizontal band is superimposed across the middle of the image, containing the word "Performance" in white, bold, sans-serif font. The background is a bright, out-of-focus window, suggesting an indoor setting with natural light.

Performance

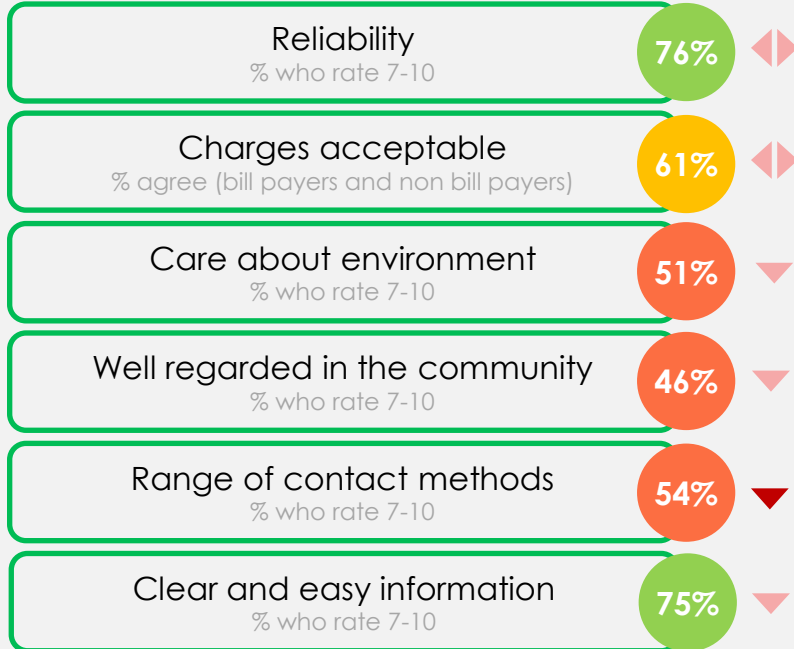
Dashboard 2023/4: value for money and affordability take a hit, though satisfaction remains stable. Awareness of CSOs increases again this year.

Core performance

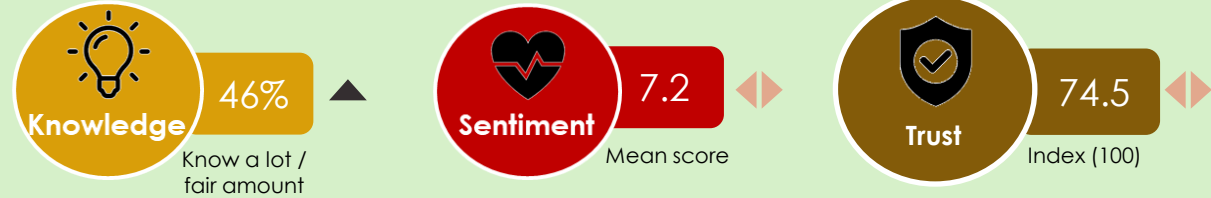


Satisfaction drivers

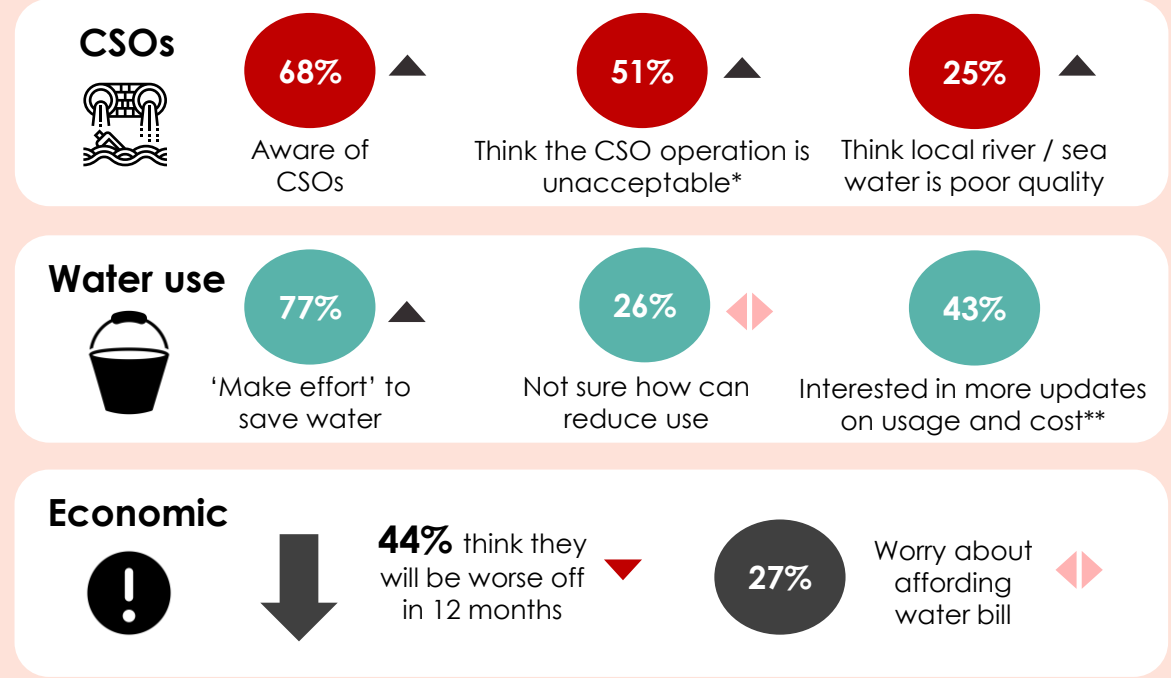
MOST IMPORTANT



Brand health



Hot topics



Key: ▲ Significant increase ▲ Directional increase ◀ No change (less than 3% pt. change)
 ▼ Significant decrease ▼ Directional decrease

Changes are 2023/4 vs. 2022/3

Overall satisfaction for 2023/4 is in line with scores for 2022/3, but there is a significant decrease since 2021/2. Satisfaction remains higher in the Wessex supply area than in Bristol and Bournemouth areas, though the gap closes between Bristol and Bournemouth.



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

Net (7-10):

9 or 10 (extremely satisfied)

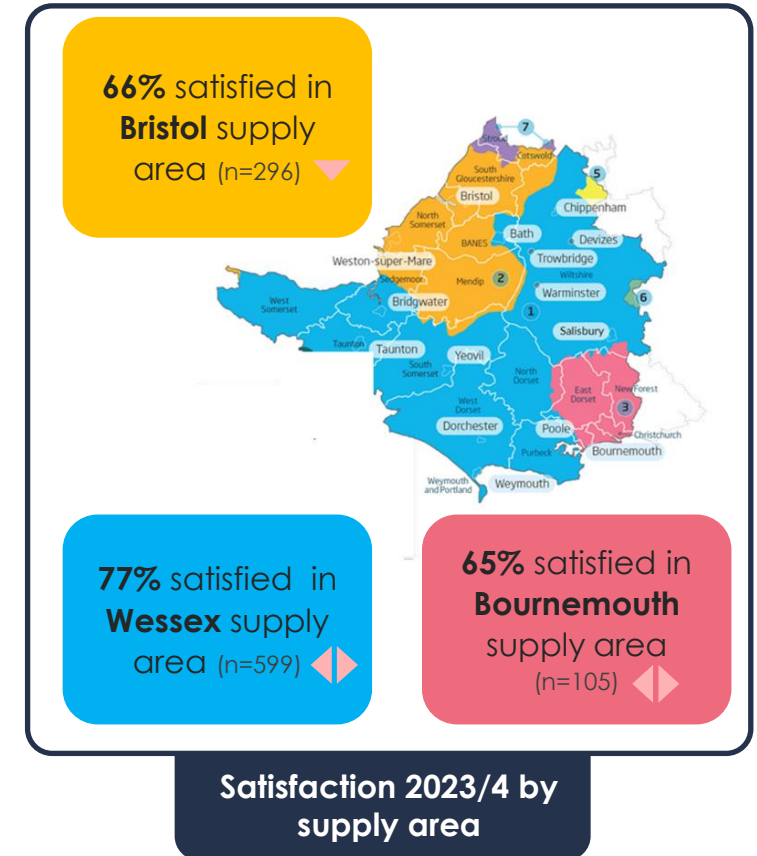
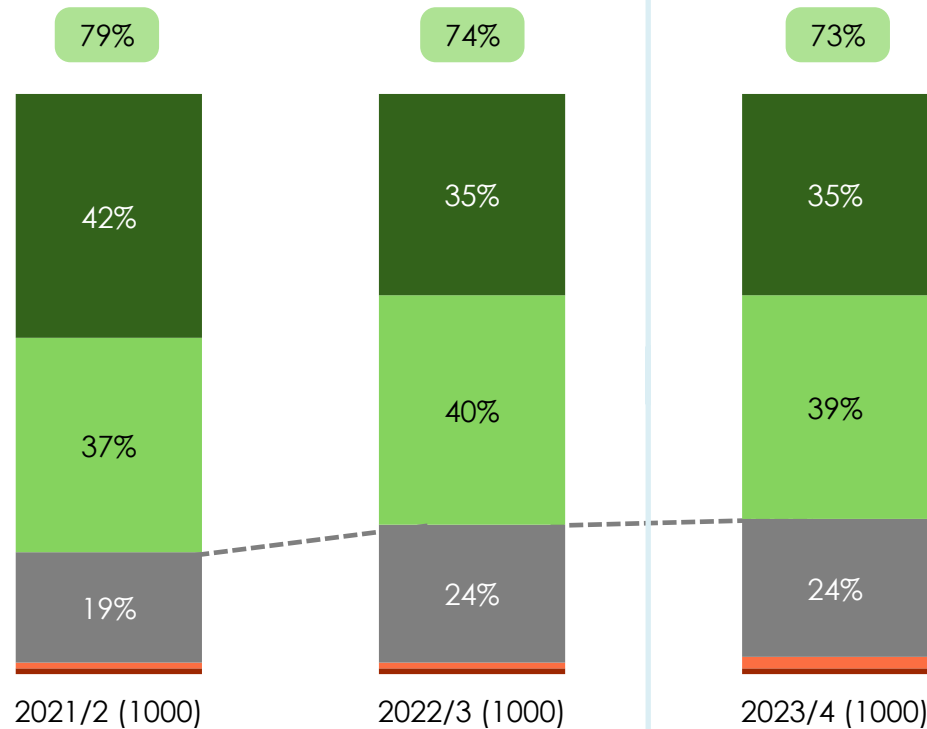
7-8

4-6

2-3

0 (extremely dissatisfied) or 1

Mean



Key: ▲ Significant increase ▲ Directional increase ▲ No change (less than 3% pt. change)
▼ Significant decrease ▼ Directional decrease

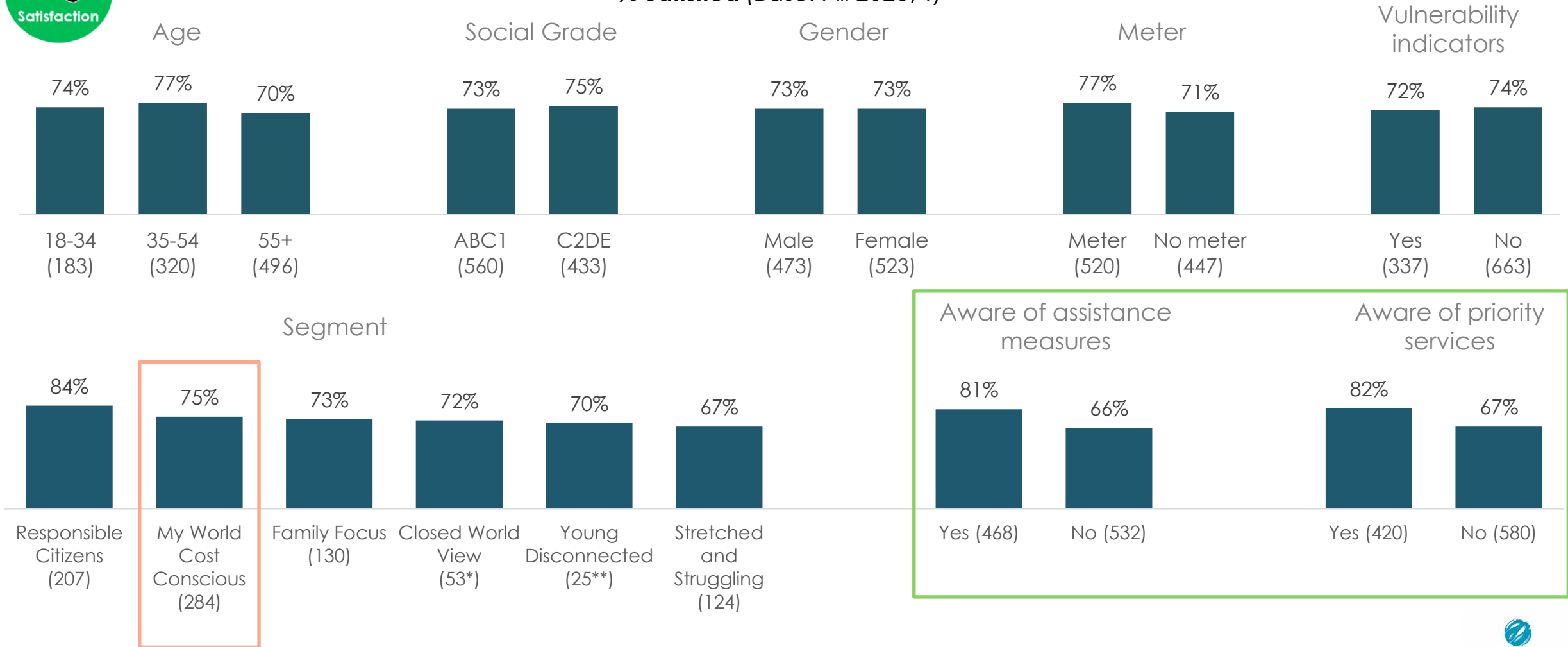
Changes are 2023/4 vs. 2022/3

Overall satisfaction by key groups

While overall satisfaction is consistent with last year, some age-related differences widen. 'Responsible Citizens', and 'My World Cost Conscious' are still most satisfied, though the gap closes between 'My World Cost Conscious' and the other segments. Awareness of services continues to correlate with higher satisfaction – a reputational benefit in promoting this.



Q15/11 Taking everything into account how satisfied are you with Wessex Water?
 % Satisfied (Base: All 2023/4)



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

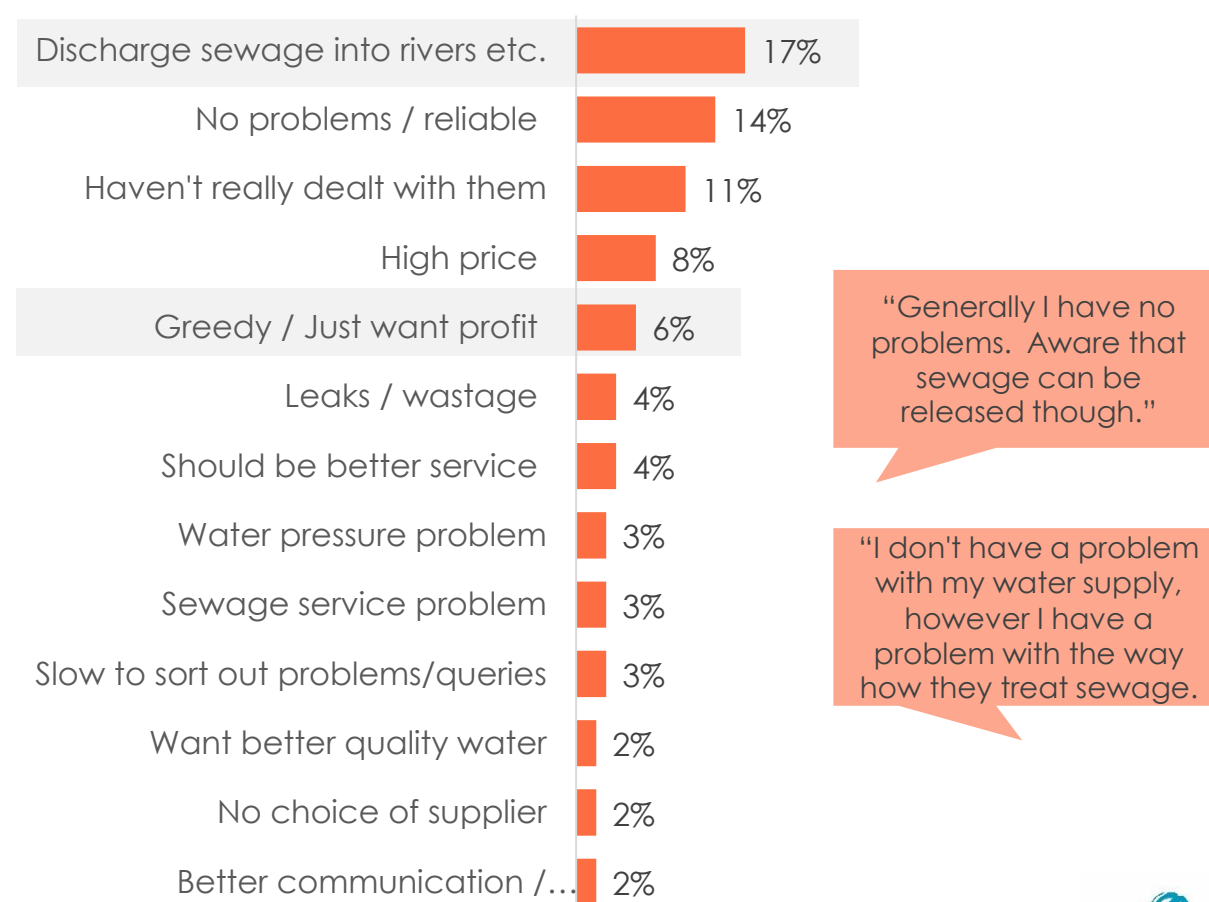
Customer satisfaction appears to be based on the absence of any issues, or a quick resolution should issues arise. Mentions of sewage discharge and profits significantly higher amongst those less satisfied. Mentions of high price has also grown but not significantly so.

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

Those who are satisfied (score 7-10) Base: 731



Those who are less than satisfied (score 0-6) Base: 269



Overall value for money

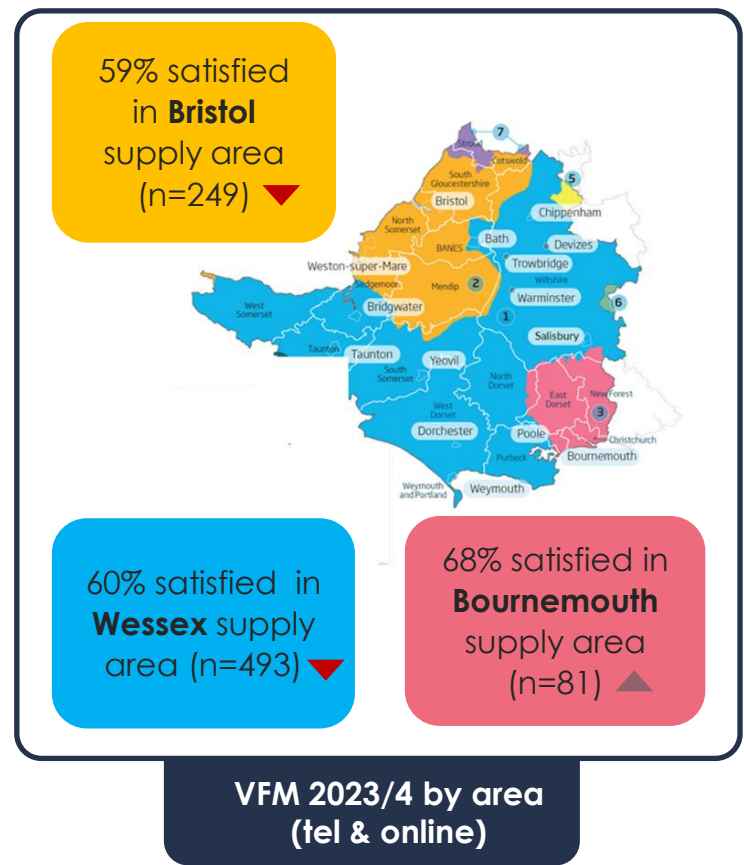
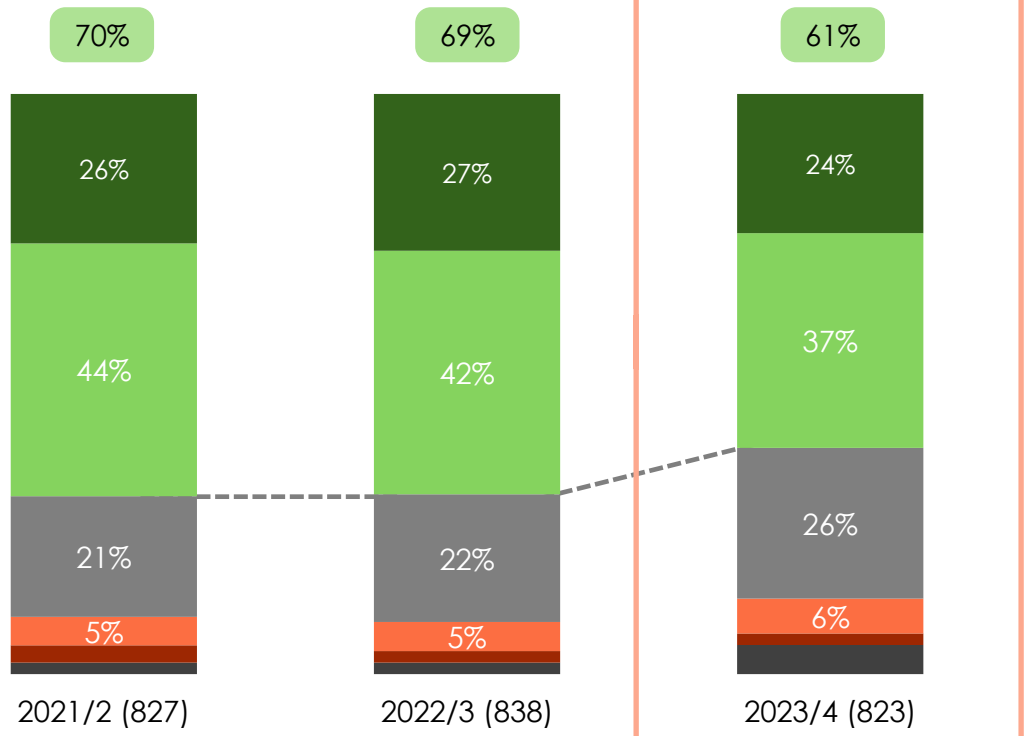
Satisfaction with **value for money** drops significantly to its lowest level, reflecting the long-term effects of the decline in outlook for household finances. Both Bristol and Wessex take a significant hit to their satisfaction levels this year.



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

Satisfied NET:

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



Key:

- ▲ Significant increase
- ▲ Directional increase
- ◊ No change (less than 3% pt. change)
- ▼ Significant decrease
- ▼ Directional decrease
- Changes are 2023/4 vs. 2022/3

Knowledge and sentiment

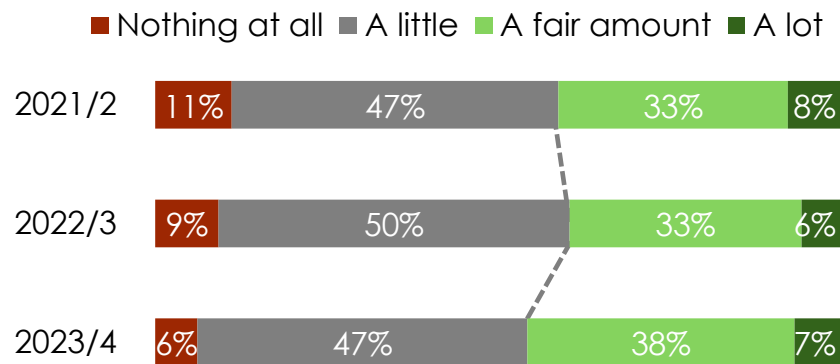


Knowledge

There's been a significant **uplift in perceived knowledge** about Wessex Water, reaching the highest level for the last three years.

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

Base: All respondents



Exposure to content on social media, hearing an advert on the radio, seeing Wessex Water being active in the community and reading the community email newsletter can be associated factors in increasing how much people feel they know about the company.

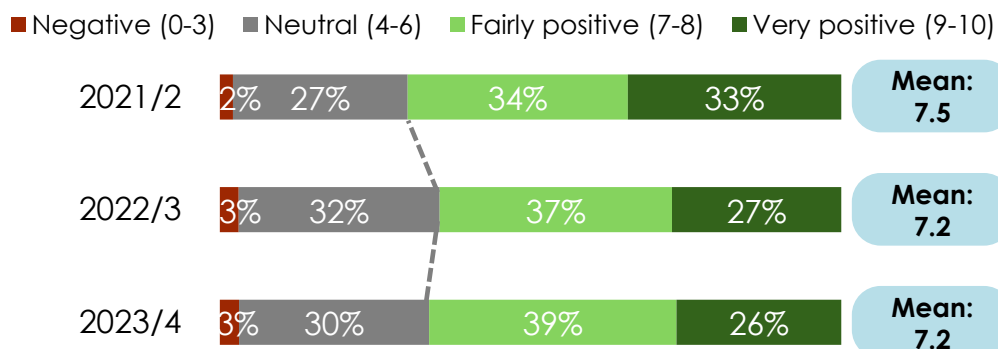


Sentiment

The proportion of customers feeling **positive** towards Wessex Water this year remains largely consistent with 2022/3.

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

Base: All respondents



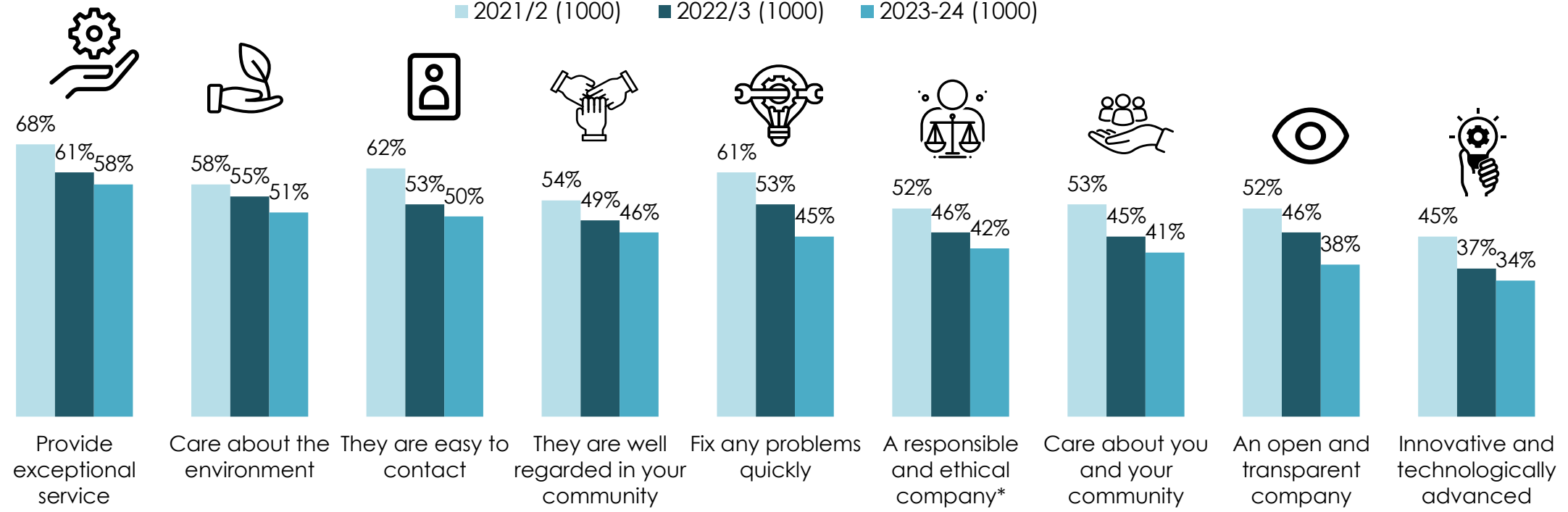
Many of the touchpoints most associated with increased knowledge also seem to boost sentiment the furthest. In particular, radio adverts, being active in the community, social media exposure and seeing TV adverts appear to enhance positive sentiment of Wessex Water.

Image of Wessex Water

The diminishing of Wessex Water's image seen last year continues for 2023/4. 58% of customers now agree that Wessex Water provides 'exceptional service'. Lower levels of agreement don't always equate to heightened negativity – there's also a rise in ambivalence towards various aspects, especially being 'open and transparent'.

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

■ 2021/2 (1000) ■ 2022/3 (1000) ■ 2023-24 (1000)



Don't know 2023/4	13%	20% (-1)	35% (+6)	29% (+4)	35% (+7)	34% (+3)	33% (+5)	38% (+9)	44% (+6)
0-3 NET 2023/4	4% (+1)	6% (+1)	3% (-1)	5%	4% (-1)	6% (+2)	5%	4%	3%

Wessex Water – Performance dimensions



Perceptions of Wessex Water's performance remain mostly consistent with 2022/3.

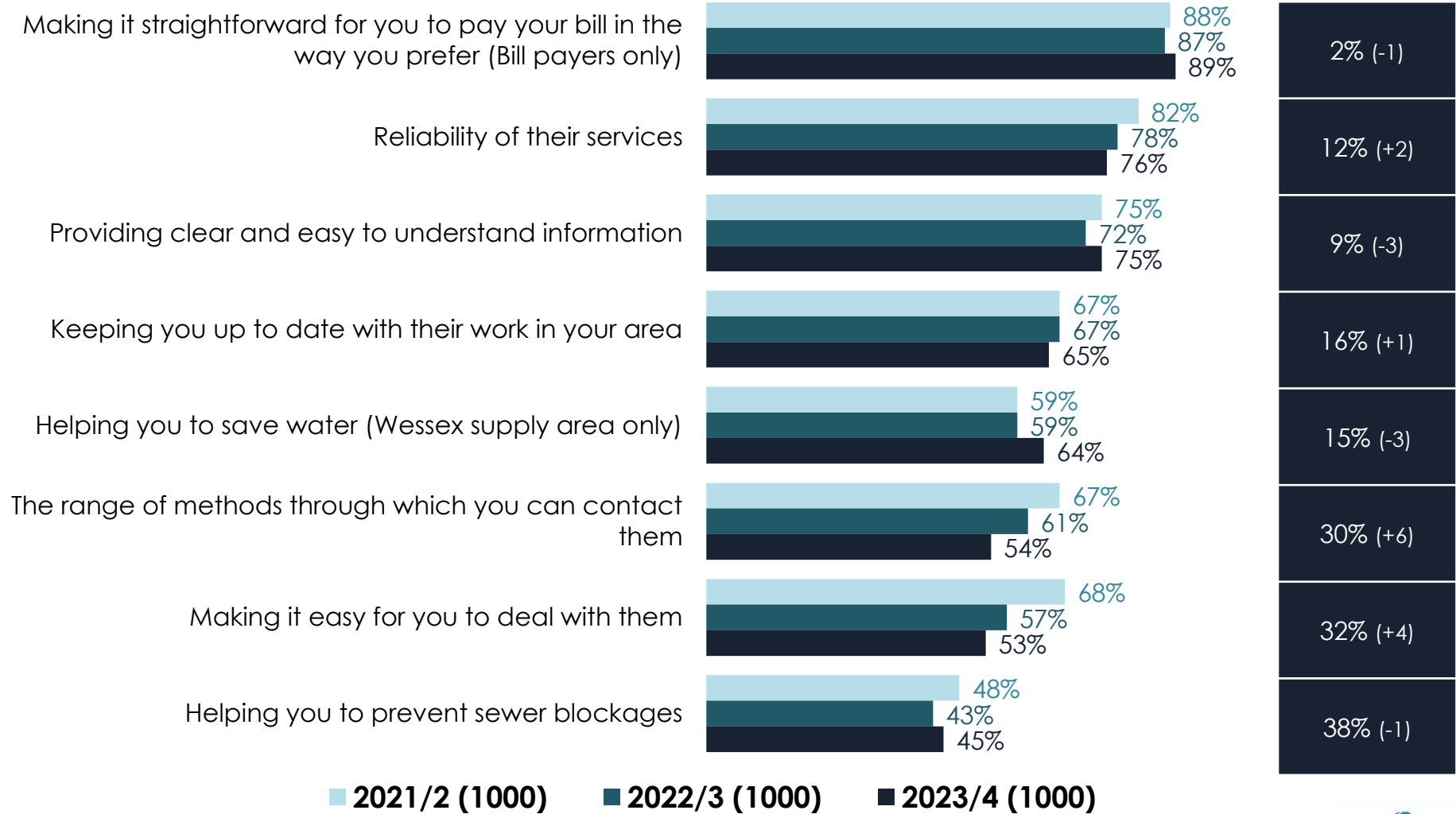
'Reliability' (an important driver for satisfaction) is still endorsed by many, though this has declined over the past 3 years.

'Range of contact methods' and 'making it easy to deal with them' have notably fallen since 2021/2, but this is partly due to more 'Don't knows', driven by those who haven't contacted Wessex Water recently.

Q13. How would you rate Wessex Water's performance in the following areas?

% rating 7-10 (10 = 'excellent' 0 = 'very poor').

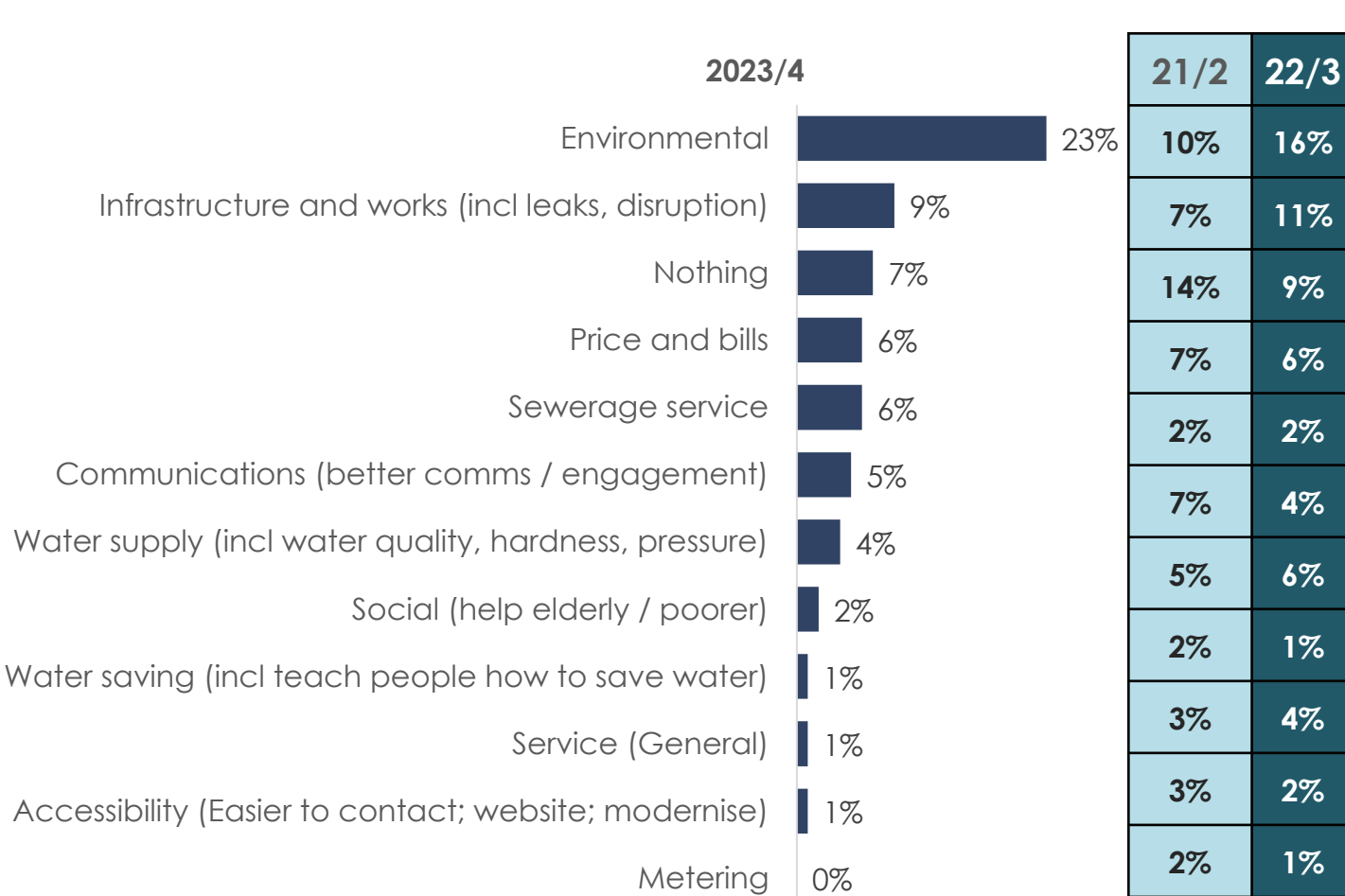
Base: All respondents



Looking ahead, what can be improved?

Almost a quarter of Wessex Water customers spontaneously mention ‘environment’ as an area for the company to improve on. Specifically, customers want Wessex Water to address sewage release, with some believing the company should direct their investments to this area.

Q14: Thinking of all the things that Wessex Water do and could do in future, what do you think it could do more of, or do better at? Base: All respondents 2021/2 (1,000) and 2022/3 (1,000) 2023/4 (1,000)



	22/3	23/4
Should be NO / LESS sewage in the rivers / sea	10%	17%
Improvement to sewage infrastructure/handling	n/a	5%
Be more environmentally/ecofriendly (general)	4%	3%
Flood prevention	1%	3%
Look after rivers and wildlife	2%	1%

“Invest more into facilities to eliminate foul discharge into watercourses and the sea.”

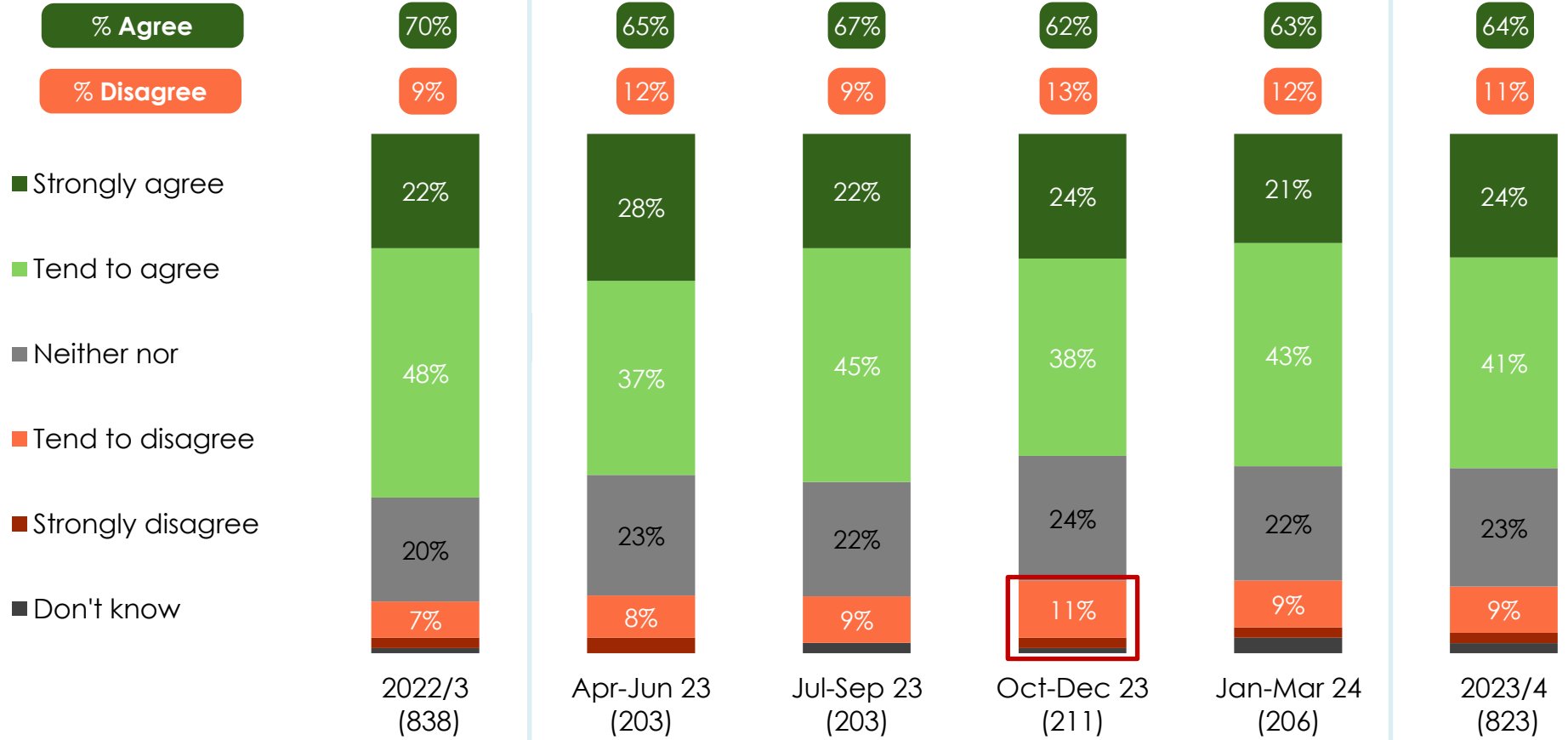
“They need to more in terms of preventing sewage discharges entering rivers and streams.”

The proportion of customers agreeing their water and sewerage charges are affordable has significantly fallen since 2022/3, with customers feel the long-term effects of rising costs. Affordability perceptions dipped to their lowest point this year over the winter months during 2023, when energy costs tend to be higher.



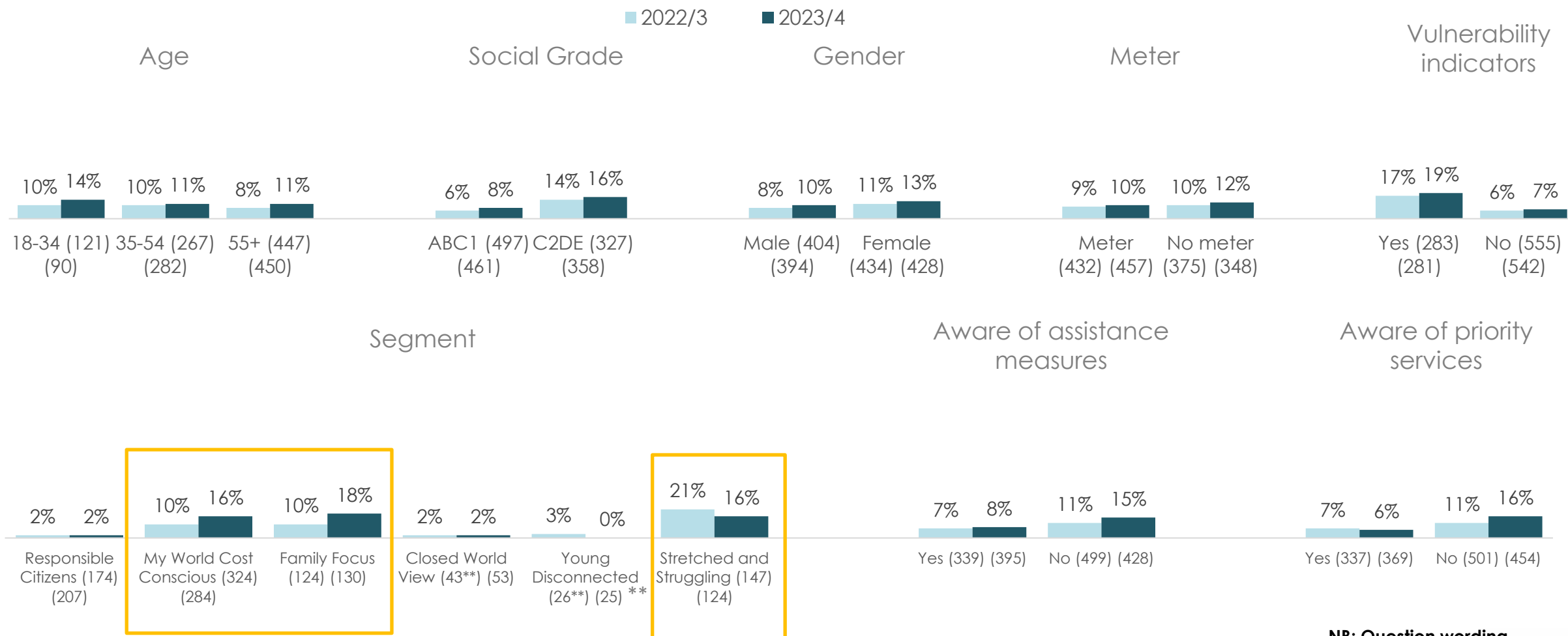
Q17. How much do you agree or disagree...? Base: All bill payers

The total water and sewerage charges that you pay are affordable to you



Unaffordability has increased slightly for most demographics in the past year. More My World Cost Conscious and Family Focus segments are more likely to think their bills are unaffordable. Notably, Stretched and Struggling are less likely to find their bills unaffordable compared to last year.

Q17. How much do you agree or disagree...? The total water and sewerage charges that you pay are affordable to you (% disagree) Base: All bill payers 2022/3 (838), 2023/4 (823)



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

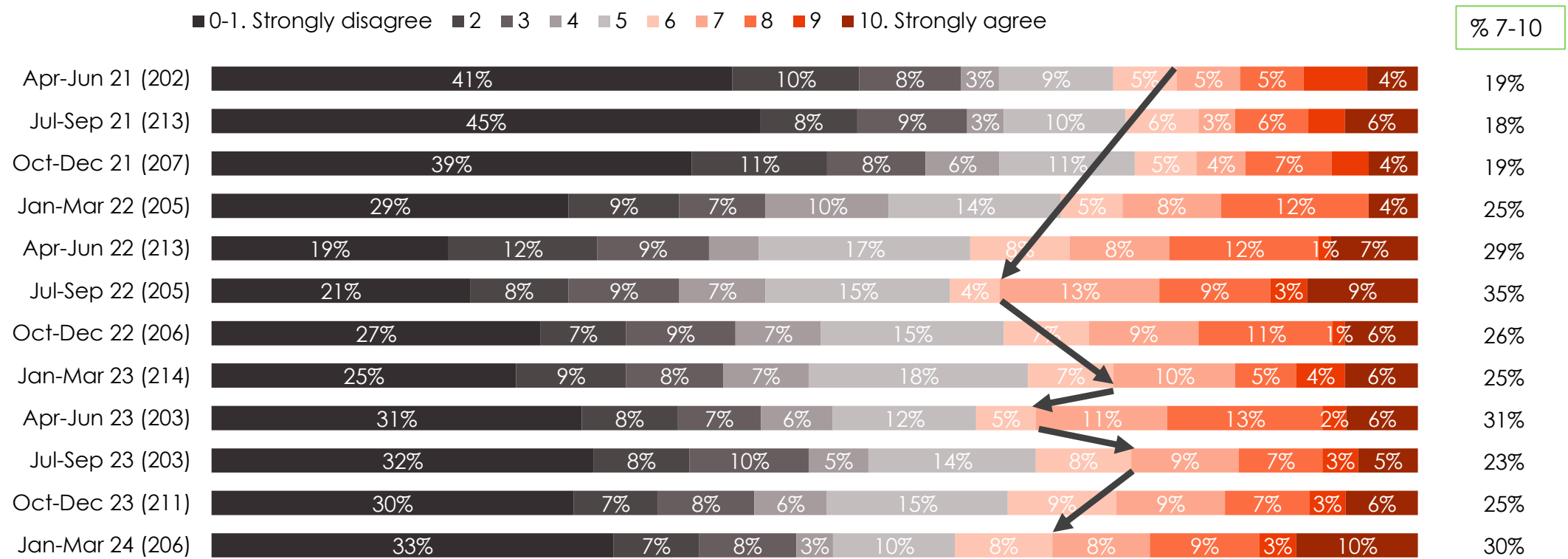
NB: Question wording changed in 2021/2



Customer worries about affording water bills peaks during Q1 2023 when inflation was at its highest level for the past 12 months, with 3 in 10 customers feeling anxious about paying their water bill.

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

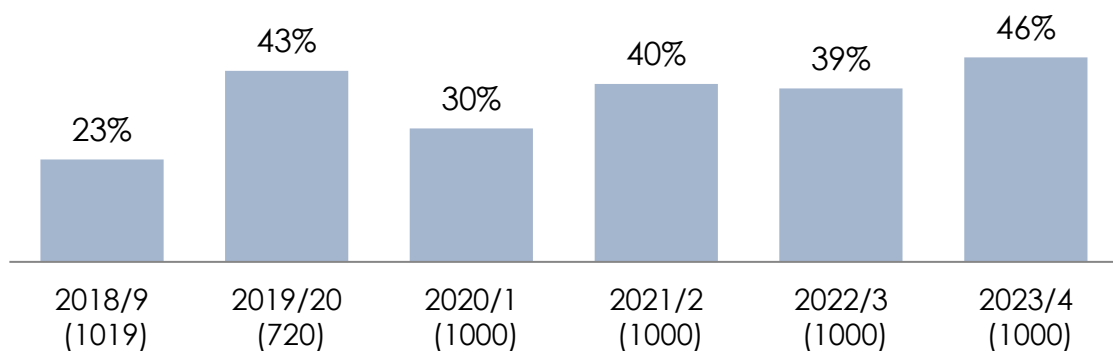
I worry about being able to afford my water bill



Awareness of Assistance Measures

Awareness of assistance for customers struggling to afford bills has risen this year, with over 2 in 5 showing awareness of both support offerings. However, those who do not feel charges are affordable are still significantly less aware and therefore unable to benefit. Awareness of priority services remains largely consistent with recent years.

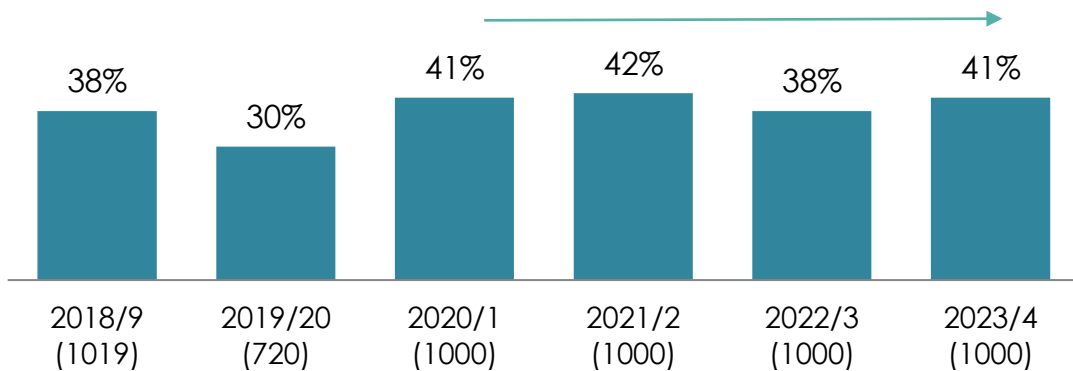
Q20r1: Are you aware of Wessex Water doing any of the following? - **Assisting customers who struggle to afford their water bill** (Base: All respondents)



46%
Aware for 2023/4
(48% of bill payers)

Lower amongst those who disagree charges are affordable (33%) – the group who are the priority to communicate this to. This is relatively similar to last year at 29%

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)



41%
Aware for 2023/4
(44% of bill payers)

46% of those who exhibit vulnerabilities are aware – still plenty of scope to increase this further. This is relatively similar to last year at 43%



Focus on Trust

Measuring Trust



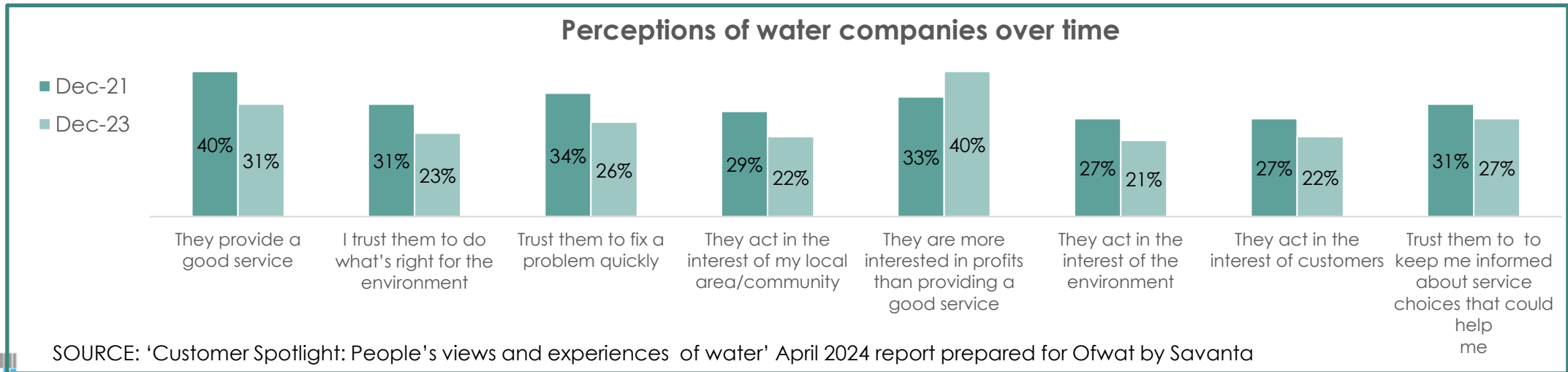
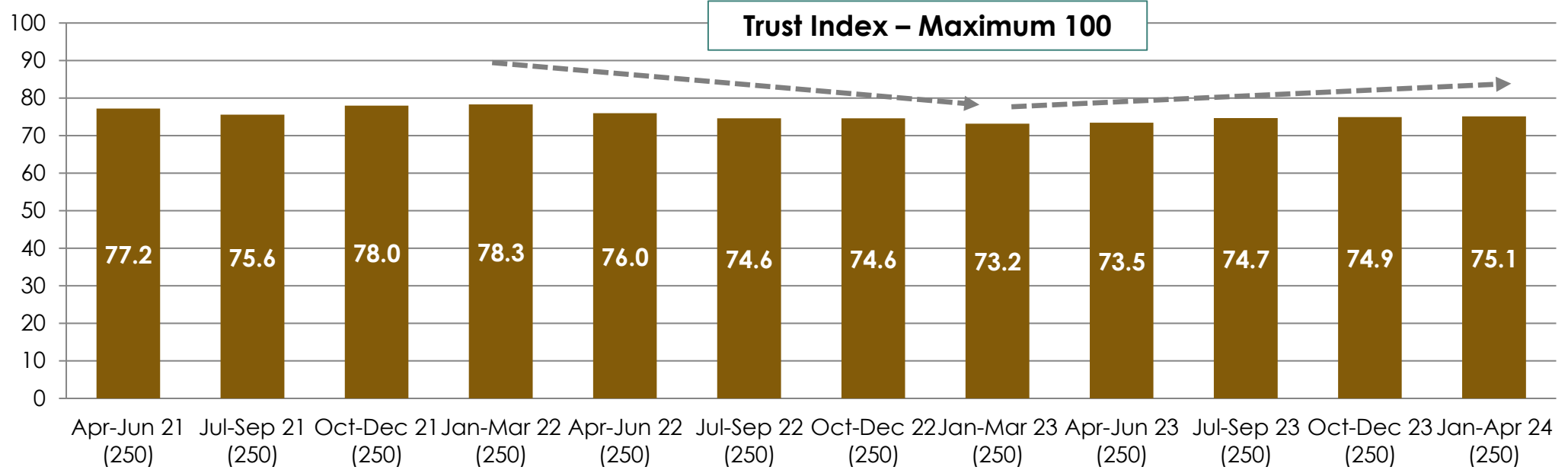
Based on frameworks for measuring trust used by ICS and Edelman, Blue Marble introduced a set of measures in the 2021/2 tracker designed to be used as components of a **Trust Index**.

Ofwat's 2022/24 research with Savanta focusing on trust also includes a number of similar measures.

Trust dimensions	Tracker measures included	Ofwat 'Customer Spotlight: People's views and experiences of water' (conducted by Savanta)
Customer ethos	<ul style="list-style-type: none"> Care about you and your community Making it easy for you to deal with them 	<ul style="list-style-type: none"> Act in the interest of customers They are more interested in profits than providing a good service
Competence and capability	<ul style="list-style-type: none"> Provide exceptional service Fix any problems quickly 	<ul style="list-style-type: none"> I trust them to fix a problem quickly
Reliability and dependability	<ul style="list-style-type: none"> Reliability of their services Easy to contact 	<ul style="list-style-type: none"> Provide a good service
Transparency	<ul style="list-style-type: none"> Open and transparent company Providing clear and easy to understand information 	<ul style="list-style-type: none"> Trust them to keep me informed about service choices that could help me
Ethics	<ul style="list-style-type: none"> A responsible and ethical company that does the right thing Care about the environment 	<ul style="list-style-type: none"> Act in the interests of the environment I trust them to do what's right for the environment
Brand validation	<ul style="list-style-type: none"> Well regarded in your community 	<ul style="list-style-type: none"> They act in the interest of my local area/ community

The questions and way of reporting in the tracker and the Ofwat research are different and cannot be directly compared. However, we reference the Ofwat research as valuable context and to triangulate findings.

Water customers in England and Wales are less trusting of their water companies overall. While Wessex Water's Trust Index fell throughout '22, the Index has slowly but steadily increased throughout '23.

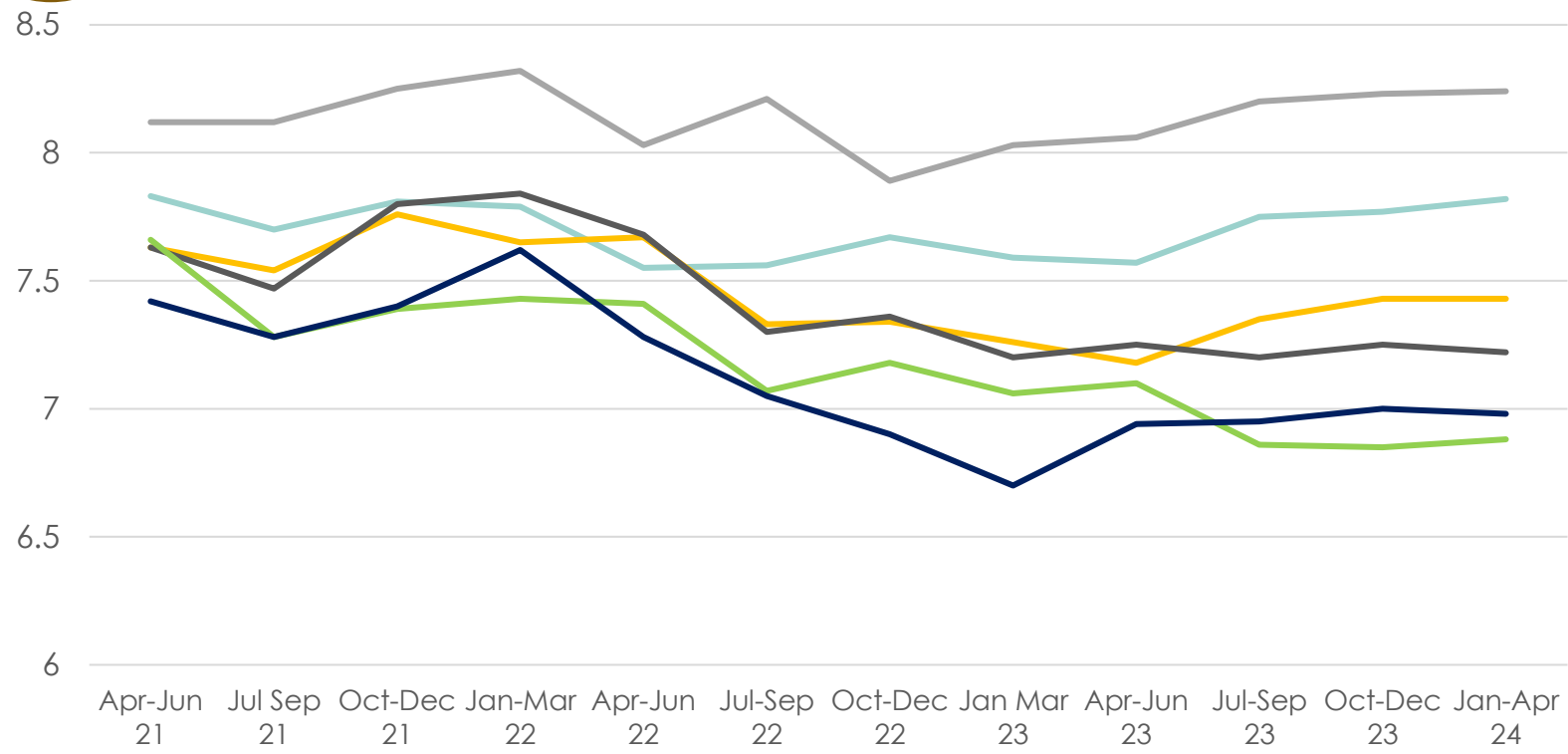


Trust Index Components over time

Most metrics are recovering, with **'Reliability and dependability'** and **'Transparency'** being on par with 2021/2 performance. However, **'Ethics'** related to 'doing the right thing' and the environment declined further since last year but remained stable over the last three Quarters.



Trust Index – Components



- Reliability and dependability
- Transparency
- Customer ethos
- Competence and capability
- Ethics
- Brand validation

Change from Q4 2022/3 to Q4 2023/4	
Reliability and dependability	0.21
Transparency	0.23
Customer ethos	0.17
Competence and capability	0.02
Ethics	-0.18
Brand validation	0.28

Trust Index 2023/4 by key groups

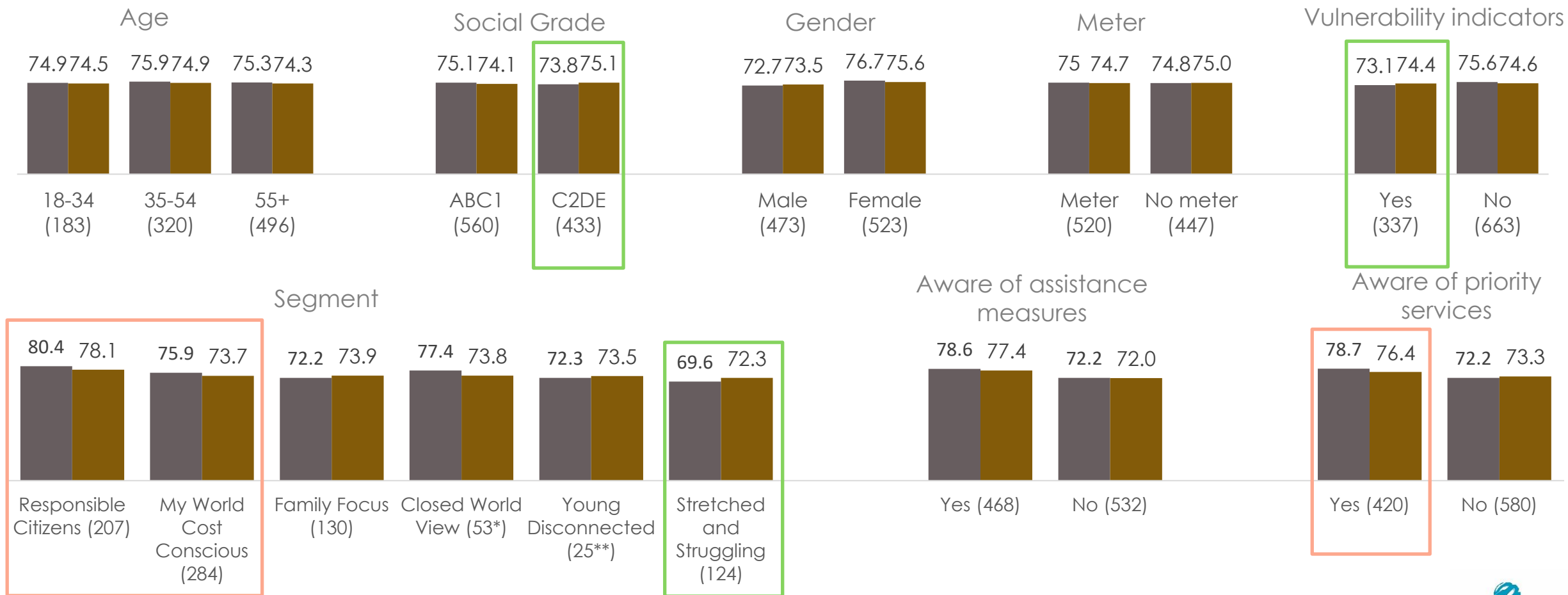


The Trust Index holds steady. The decline is the sharpest amongst 'Responsible Citizens' and 'My World Cost Conscious' segments compared to last year, while most notable increases are amongst the 'Stretched and Struggling' segment.

Overall Trust Index: 74.5

Trust Index (Base: 2023/4)
Score out of 100

■ 2022/23 ■ 2023/24



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

Boxes denote biggest shifts between 2022 and 2023

Trust signature by key segments

'Stretched and Struggling' on average to rate community-based metrics more highly vs last year, while increase in 'Family Focused' segment is driven by better communication vs last year. There is a need to build awareness about environmental issues for 'Responsible Citizens' and highlight community-based issues for the 'My World Cost Conscious' segment to bolster trust.

	Responsible Citizens (207)	My World and Cost Conscious (284)	Family Focus (130)	Closed World View (53*)	Young Disconnected (25**)	Stretched & Struggling (124)
Brand validation	7.4	6.9	6.8	6.9	7.3	6.8
Competence and capability	7.6	7.2	7.1	7.1	7.0	7.1
Reliability and dependability	8.6	8.0	8.2	8.1	8.5	7.8
Customer ethos	7.9	7.2	7.2	7.4	7.1	7.1
Transparency	8.1	7.6	7.7	7.7	7.8	7.5
Ethics	7.1	6.9	6.7	7.1	6.3	6.9

0.4+ VS LAST YEAR

+0.3 VS LAST YEAR

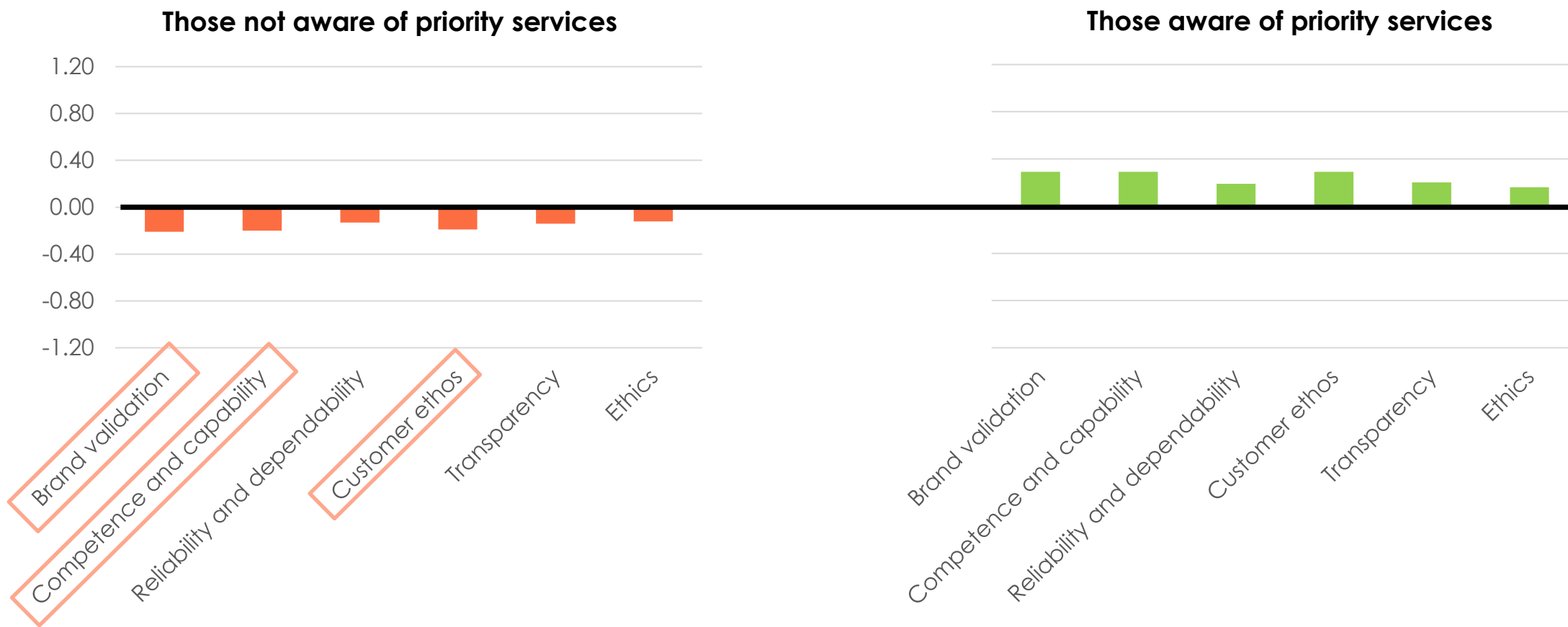
-0.3 VS LAST YEAR

-0.4+ VS LAST YEAR

Trust signature for those unaware and aware of PSR

Those aware of priority services on average rate Wessex Water's '**Brand validation**', '**Competence and capability**' and '**Customer ethos**' more highly than those not aware of priority services. This highlights the importance of the PSR in building trust that Wessex Water cares about its community.

Columns indicate difference to overall average score for each trust component

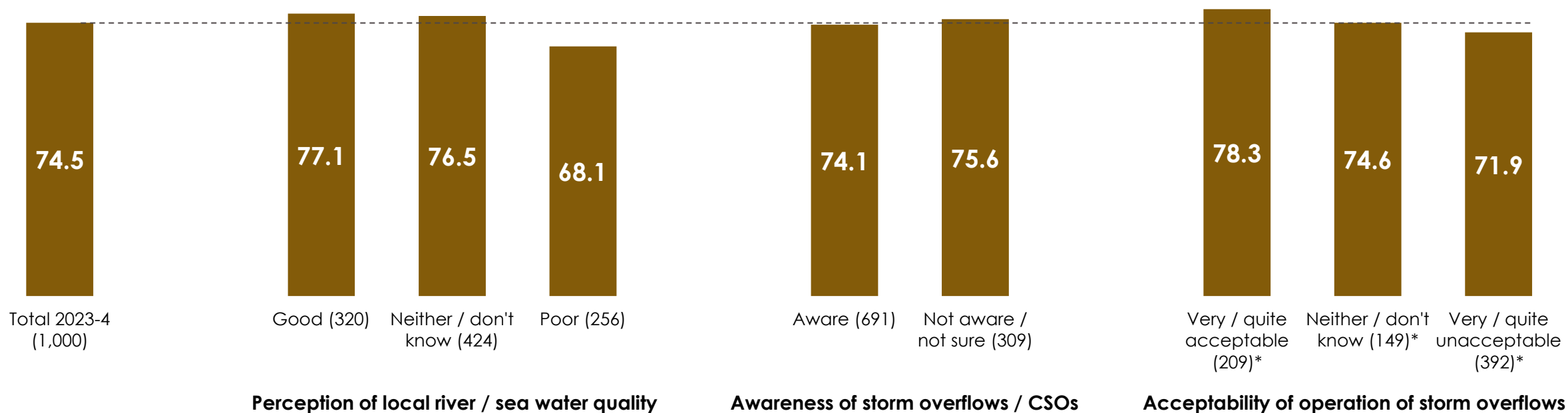


Trust Index – 2023/4: Differences by awareness & attitudes to CSOs

Those who find storm overflows unacceptable and those who perceive local river/sea water quality as poor tend to, on average, have a lower Trust Index. However, awareness of CSOs alone does not appear to dictate trust scores.



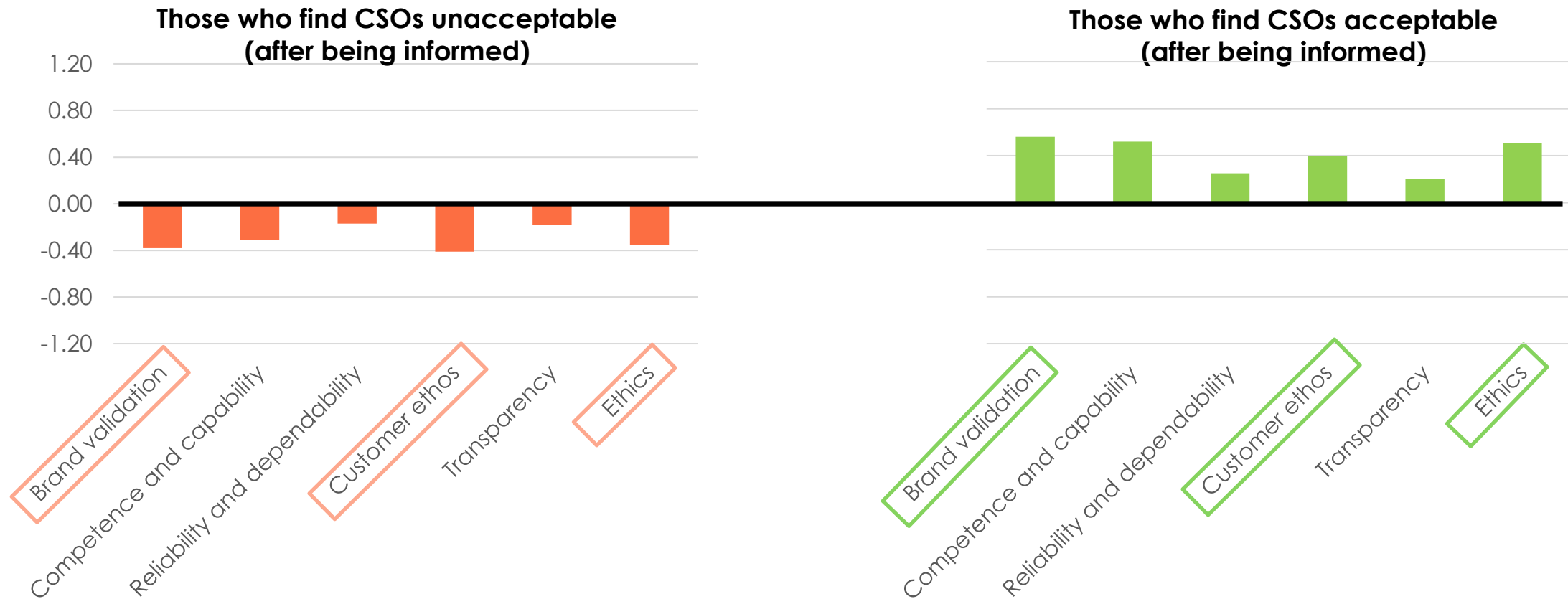
Trust Index – Maximum 100



Trust signature of those who find CSO operation unacceptable and acceptable ³²

Those who find CSOs unacceptable on average rate 'brand validation' and 'customer ethos', which are both related to reputation within the community, lower than those who find it acceptable. 'Ethics' is also lower – which is the belief that Wessex Water is doing the right thing - and is environmentally conscientious is also lower. Again, this furthers the need to establish Wessex Water as a company that does right by the community to help moderate views on CSOs.

Columns indicate difference to overall average score for each trust component



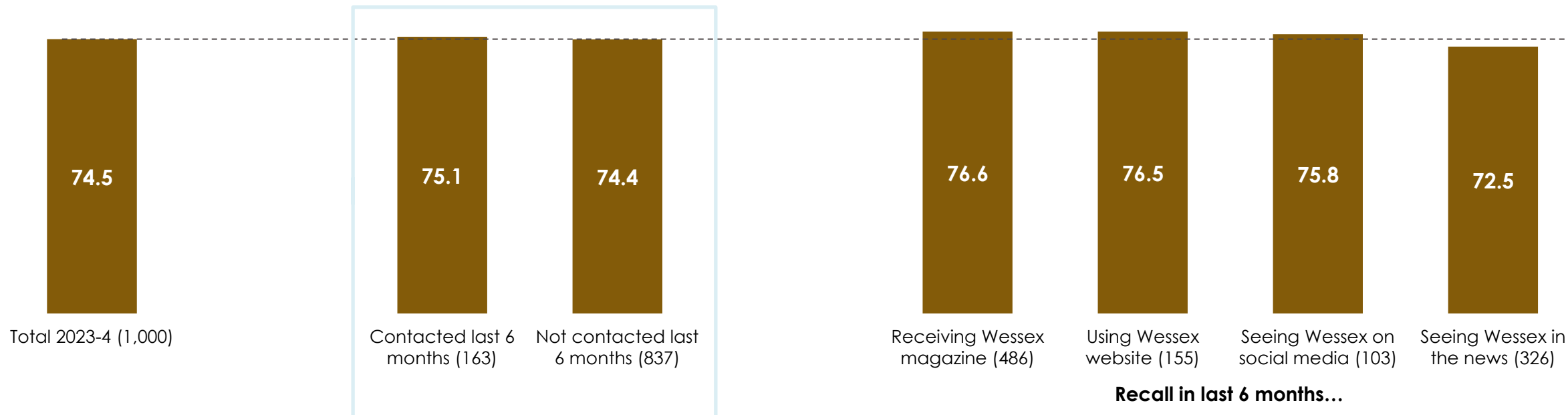
Base: Those who find CSOs unacceptable (after seeing information) 2022/3 (391); Those who find CSOs acceptable 2022/3 (374)

Trust Index – 2023/4: Differences by touchpoints

Any exposure to Wessex Water touchpoints seem to have a slight positive effect on the Trust Index. The Wessex Water magazine and website seem to be linked with a higher Trust Index score, which suggests these communication channels have the potential to be an asset in combating reputational challenges.



Trust Index – Maximum 100



- Ofwat research shows a decline in consumer trust across the water industry. However, the Wessex Water tracker shows a slow and steady recovery in trust for Wessex Water over the last year.
- Most aspects of Trust have recovered versus the last year, in particular:



Brand validation

- Well regarded in the community



Transparency

- Open and transparent company
- Providing clear and easy to understand information

- Improvement in these aspects may have helped to boost trust in the 'Stretched and Struggling' and 'Family Focused' segments.
- However, more can be done to improve Trust metrics through direct communications (e.g. Wessex Water magazine, website social media):
 - **Ethics** (A responsible and ethical company that does the right thing; Cares about the environment) is still in decline
 - Trust Index is lower for the '**Responsible Citizens**' segment vs last year:
 - focus communication on ethical/environmental aspects of the Wessex Water operation
 - perceptions about CSOs seems to impact trust
 - Trust Index is lower for '**My World Cost Conscious**' segment vs last year:
 - focus communication on community focused initiatives to bolster trust
 - awareness of financial assistance and PSR appear to impact trust





Storm overflows

Awareness of storm overflows

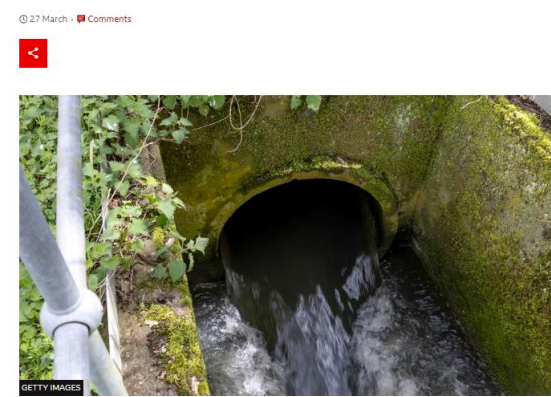
Sewage discharge remains prominent in the media. The latter half of 2023 saw English water companies apologising for this and vowing to reduce CSO operations. There appears to be a dip in awareness in Q4, perhaps coinciding with a lull in public interest and the redirection of attention to the negative press for Thames Water. It will be interesting to see how awareness changes with the release of the EA CSO report toward the end of Q4 and the upcoming general elections.

English water companies offer apology and £10bn investment for sewage spills

Under-fire bosses announce 'unprecedented plan' to reduce last year's 300,000 incidents of sewage pollution
 Down the drain: how billions of pounds are sucked out of England's water system



Raw sewage spills into England rivers and seas doubles in 2023

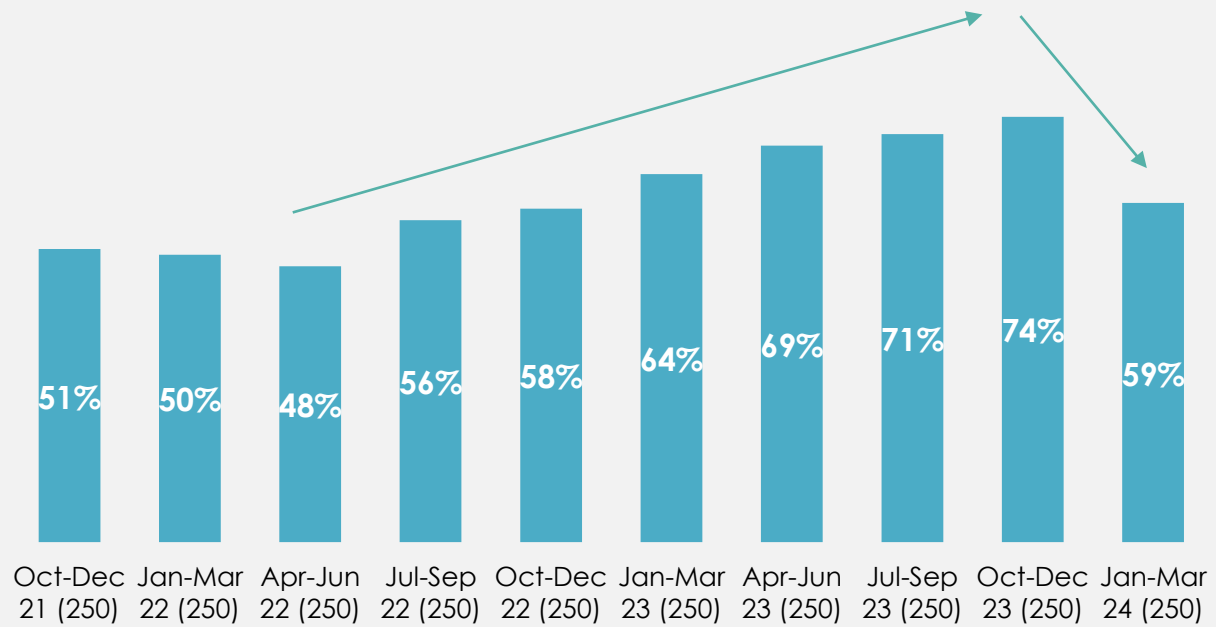


Google Trends UK – "Sewage discharge"



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

Base: All respondents



Higher awareness of CSOs amongst:

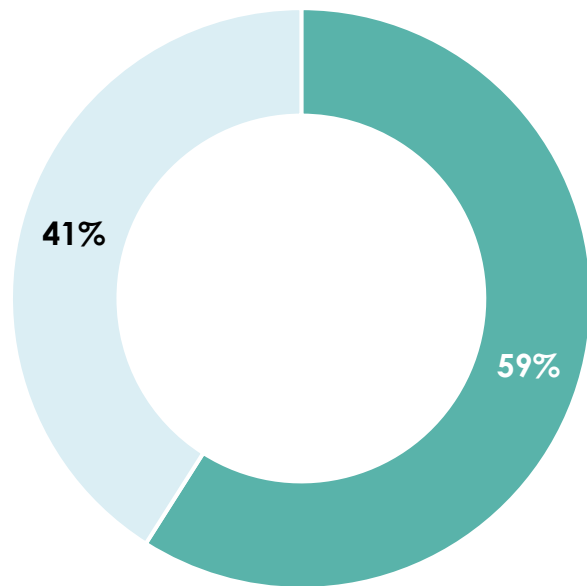
- Those who recall seeing/hearing about Wessex Water in the news (L6M)
- Older (55+); Male, ABC1; 'Responsible Citizens' and 'My World Cost Conscious' segment

Source of awareness of storm overflows

The vast majority of those aware of storm overflows heard about it via the news. Only a handful cite Wessex Water as a source of awareness about storm overflows.

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

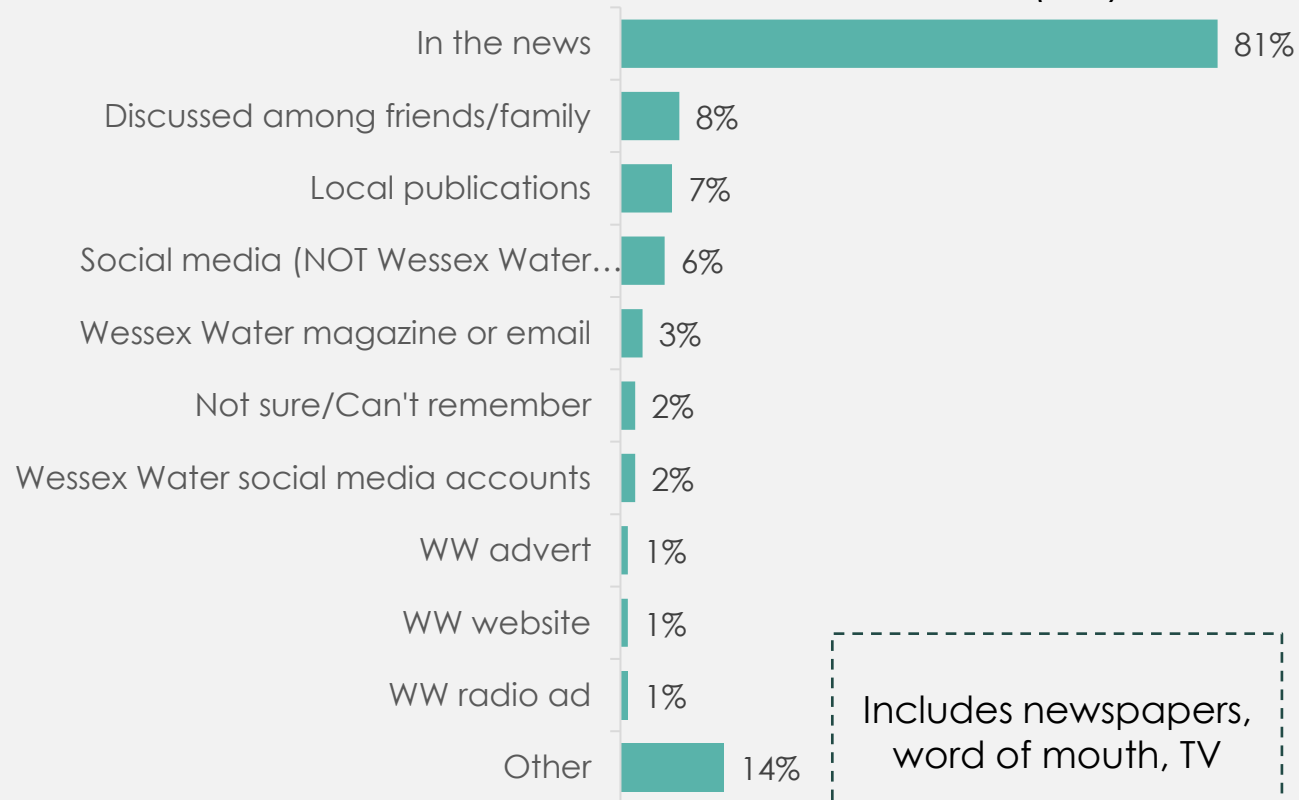
Base: All respondents (250)



■ Yes ■ No/Don't remember

QF1e And where did you hear about this topic?

Base: All who have heard about storm overflows (148)



Includes newspapers, word of mouth, TV

Impact of awareness of CSOs on satisfaction and sentiment

Awareness of storm overflows has a clear impact on overall satisfaction (significantly lower); and customers who are aware of CSOs are significantly less likely to positively endorse Wessex Water on perception metrics (more likely to say 'unsure/don't know'). Overall sentiment towards Wessex Water is, however, not affected.

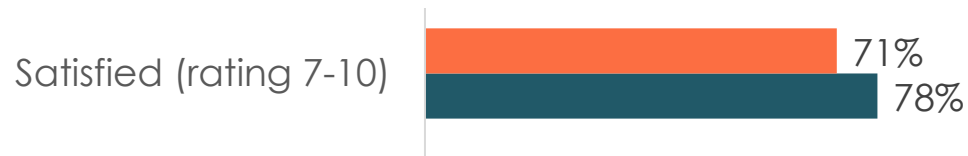
Q4: Now thinking about Wessex Water. Please tell how do you feel about them overall?

Base: All Respondents



Q11: Taking everything into account how satisfied are you with Wessex Water?

Base: Total Respondents



■ Aware of CSOs (586)
 ■ Not aware of CSOs (414)

Q8: Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements?

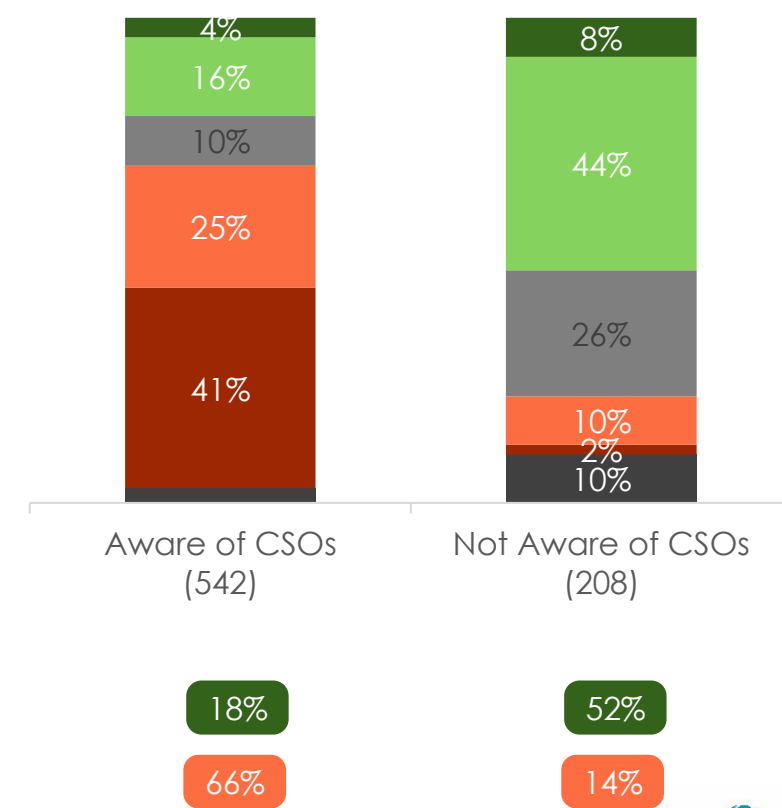
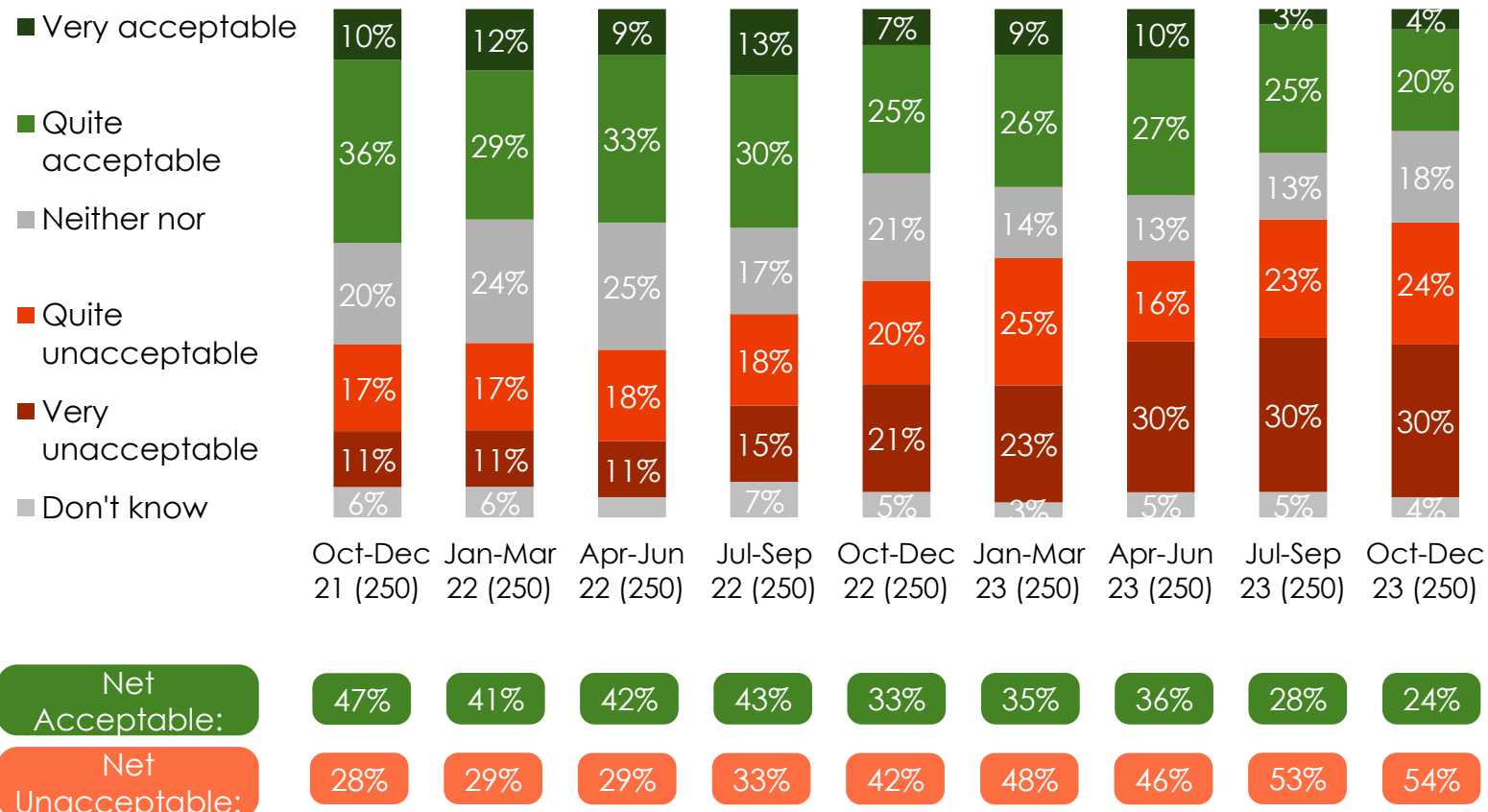
Base: All Respondents aware of CSOs (586) / not aware (414)



Acceptability of the operation of storm overflows (CSOs)

Disapproval of storm overflows continues to grow since Summer 2022, with over a half stating that the practice is unacceptable. 3 in 10 feel storm overflows are 'very unacceptable', suggesting it is a highly charged issue. Prior knowledge of CSOs appears to have a negative effect on the tolerance of CSOs (even when presented with 'neutral' description about the practise.)

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

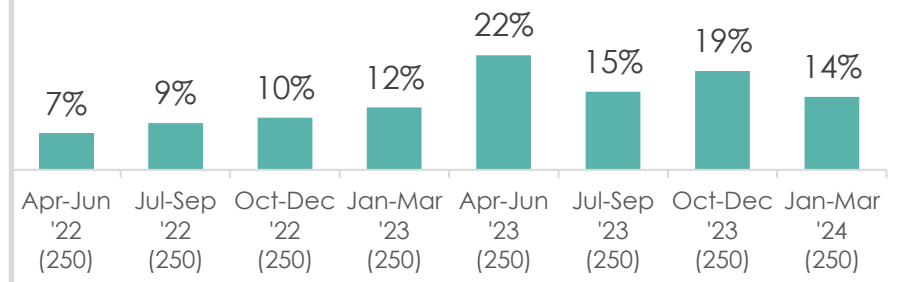


Note: Question asked in Q1-3 2023/4

Sewage in the environment – spontaneous mentions

Sewage in rivers and seas remains a key area that Wessex Water customers want addressed. The proportion of spontaneous mentions has fluctuated throughout the year; however, it is noticeably higher than last year. Verbatim comments indicate customers want to know more about how Wessex Water is tackling this issue - which might in turn help to tackle perceptions about profits and shareholder dividends.

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?
Coded mentions
% Environment
Base: All respondents



“They have to be **more transparent** regarding sewage overflows.”

“They need to **invest** more in making sure that sewage is disposed of in a responsible manner and they also need to ensure that rivers are not constantly fouled up.”

“Make their customers more **aware about their investment** towards infrastructure and provide more clarity about the subject of sewage.”

“**Spend the money** on doing things correctly, reduce the management waste and if you are pumping sewage etc into the rivers and sea i.e. waterways or down a discharge no fees to directors ...and the same to shareholders and holding companies.”

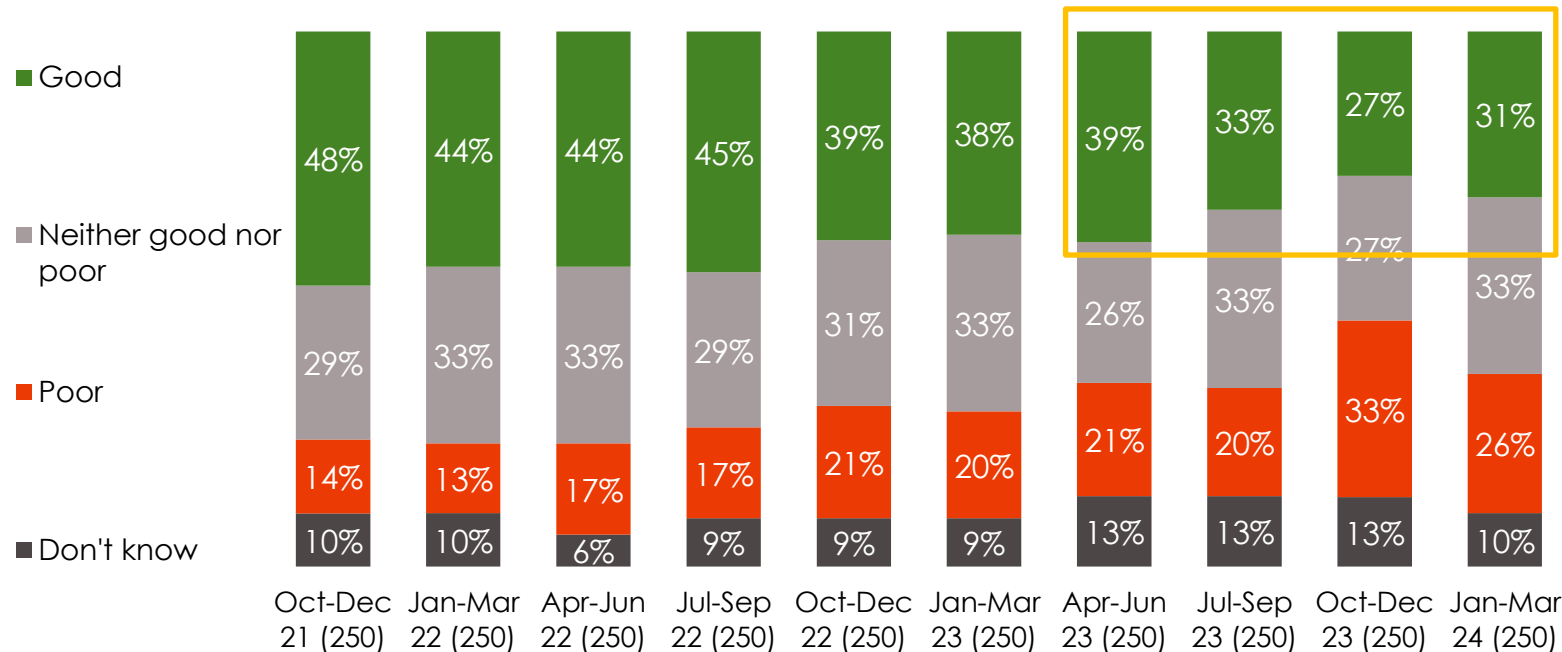
“They need to **provide more public awareness in terms** of what they are doing in the background regarding storm overflows and sewage overflows.”

“Don't like any water company that gives its profits to shareholders instead of **investing in the company** so they don't pump sewage into rivers and the sea.”

Perceptions of water quality in Wessex Water region

Positive perceptions of the quality of water in rivers and seas has been in decline since Summer 2022, with less than a third now rating the water quality as 'good'. Growing discontent about the quality of water in their area may account for the increased urgency for Wessex Water to address sewage overflows as it is affecting customers directly.

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



“My main concern is about sewage overflows. They need to look after **their** rivers as well.”

“They need to protect areas such as **Radipole lake** from sewage discharges.”

“They need to sort out overflows into **our** rivers and streams.”

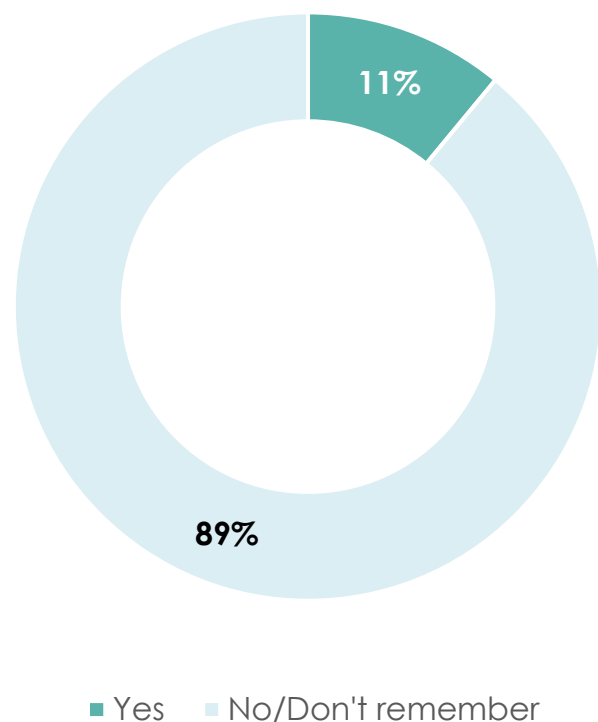
“DONT DUMP RAW SEWAGE INTO **OUR** RIVERS, STREAMS AND SEAS!!!”

“They need to improve the water quality of the **River Avon.**”

Awareness of Wessex Water activity to reduce storm overflows

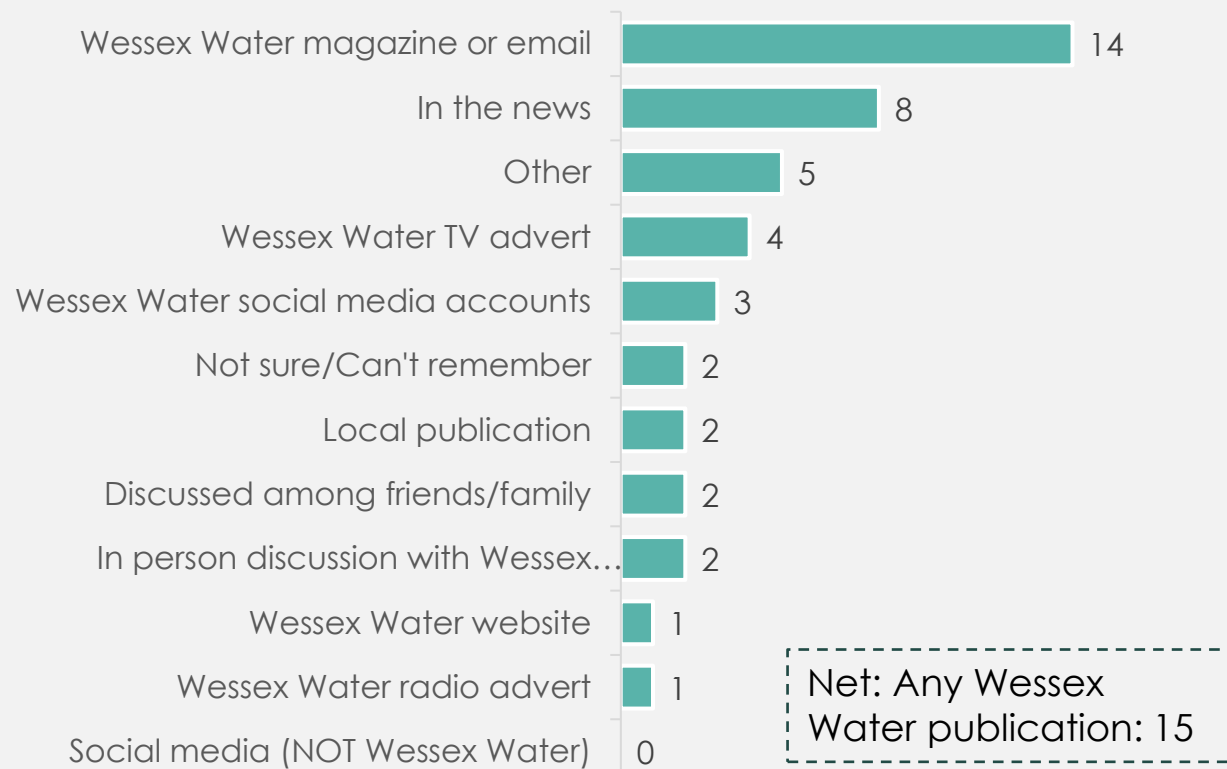
Only 1 in 10 aware of Wessex Water’s endeavours to reduce storm overflow activities. Most of the handful of people aware recall seeing or hearing about this in some form of Wessex Water communication.

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 (250)



QF1h And where did you hear about this topic? (Number of mentions)

Base: All aware of Wessex Water activity to reduce CSOs (29)

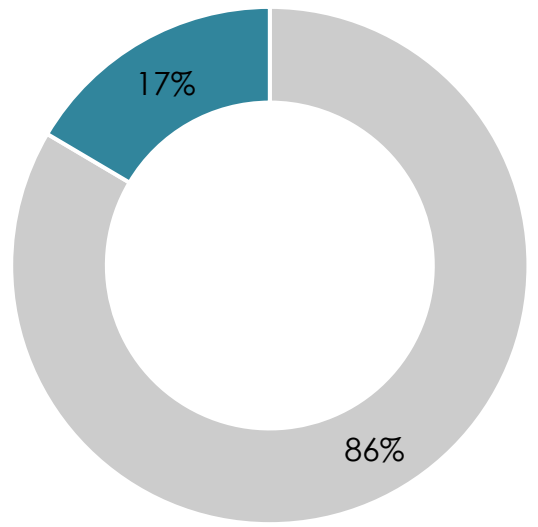


Note: Due to the small sample size, QF1h is presented as number of mentions as opposed to percentages and insight should be considered directional

Awareness of what happens to rainwater

There is limited understanding of what happens to rainwater after it falls. Many associate it with drains and sewers – a few are able to provide further information, believing it travels to treatment facilities or the sea. Some do not link rainwater to drains, believing it evaporates or is absorbed into the ground.

QNEW Please describe what you think happens to rainwater that falls on your property? (i.e. where does it flow/travel to after it hits your roof, driveway yard etc.?).
 Base: All respondents (250)



■ Provided answer ■ Don't know

“**No idea** what happens to all the rainwater or where it goes.”

“Mine enters two **drains** at the front and back of my house.”

“Down the **gutter** and into the street then eventually down the nearest **drain.**”

“Goes into the underground pipes and I **don't know what happens to it after that.**”

“A lot goes into our **water butts**, some goes into **soak aways**, the rest into **drains.**”

“**Seeps** into the groundwater mostly. Some will **evaporate.**”

“I don't think the rainwater on my roof enters the drain, I think it **gets absorbed by the ground.**”

“It goes into the sewage systems”

“It goes down the road and where I live in the Mendips it goes into **caves.**”

“Into public drains and then into **rivers and water courses.**”

“I'd like to think it goes into storage / but I fear it goes into the **sewers and then into the sea.**”

“Goes to a big body of water where it's **treated** and then used for drinking water or irrigation.”

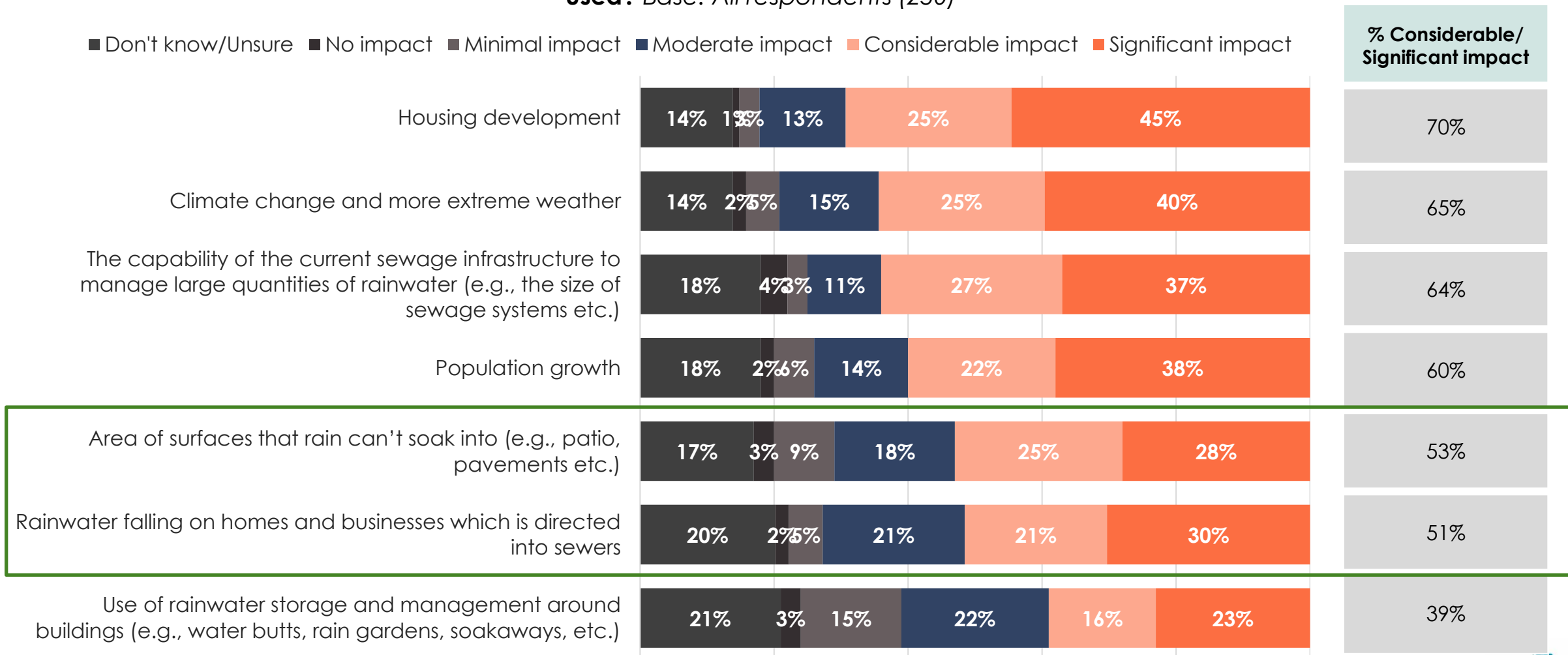
“It runs down the roof into the gutters from there it flows into the sewer and along to a **treatment plant.**”

Impact of factors on storm overflow operations

There is a notable proportion unsure of what impacts storm overflow operations and only 1 in 2 believing rainwater from properties and buildings have a weighty impact on usage, suggesting a need for further education on this topic.

Q1dNEW - What impact, if any, do you think the following factors have on how often storm overflows are used? Base: All respondents (250)

■ Don't know/Unsure ■ No impact ■ Minimal impact ■ Moderate impact ■ Considerable impact ■ Significant impact



It is unsurprising that sewage overflows remains top of mind for Wessex Water customers, given the ongoing (negative) media attention to this topic.

- Awareness of 'CSOs' or 'Storm overflows' continued to rise for the most part of 2023/4, reaching a peak of 74% in Q3.
- The majority of those aware of CSOs first heard about it via the news.
- Over a half of customers do not find sewage overflows acceptable after being presented with information about how it operates – almost a third find it 'very unacceptable' suggesting that it is an emotive topic for many.

While awareness of CSOs do not seem to impact sentiment toward Wessex Water, there is evidence to suggest that awareness of CSOs does cause uncertainty about Wessex Water as a brand.

Coinciding with growing disapproval of storm overflows is a decline in the proportion of those who find the water quality in their seas/ivers 'good'. This alongside verbatim suggest that customers feel they can see the effects of CSOs directly and perhaps accounts for it being so emotive for many.

Spontaneous mentions to resolve this issue has almost doubled since last year and is one of the top priorities' customers feel Wessex Water should address – which tallies with the findings from the latest Ofwat report from April 2024.

Opportunity to further promote Wessex Water's activities in this area - customers want to hear about what Wessex Water is doing to tackle this issue and what investments are being made in this area but only 1 in 10 recall seeing anything related to this.

Yorkshire Water vows to cut sewage overflow into Scarborough sea

© 3 October 2023



Southern Water vows to cut sewage spills by 20%

© 22 September 2023





Water saving behaviours and attitudes

Attitudes to water use and metering

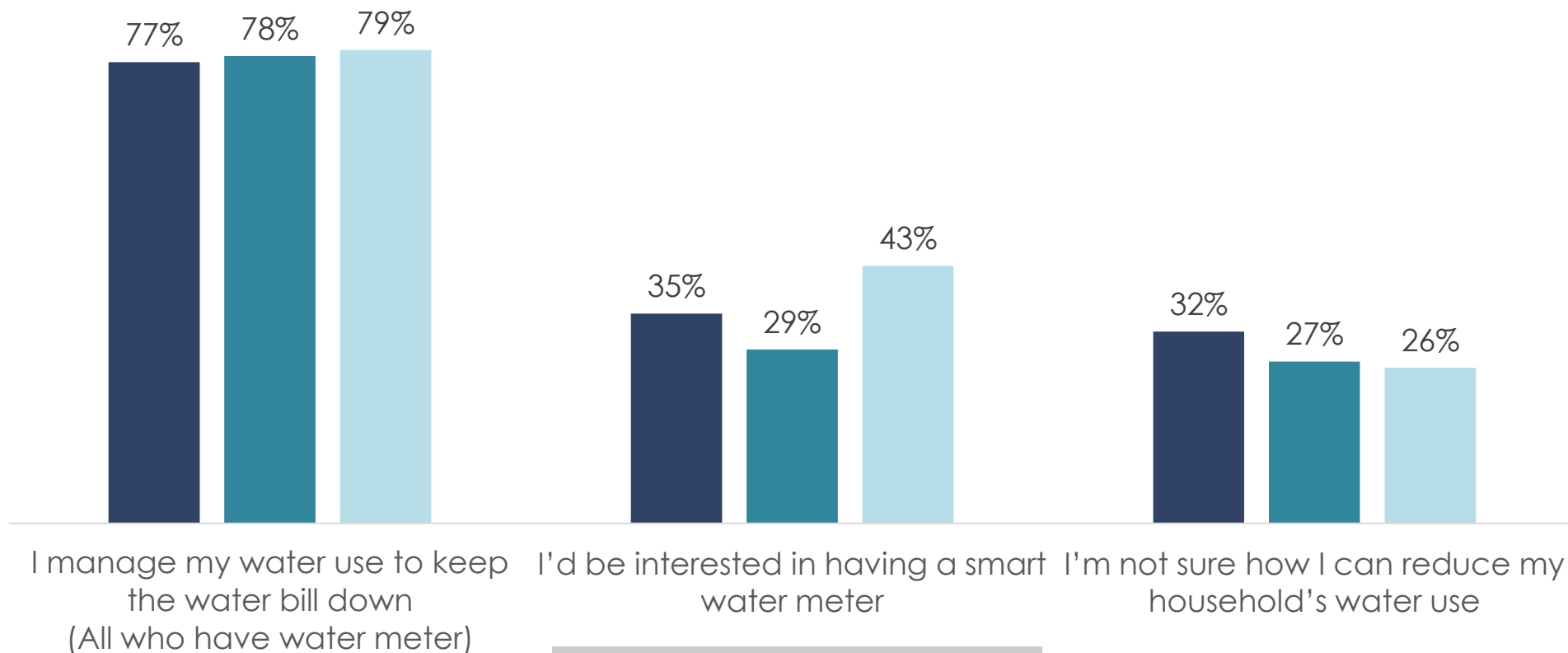
Managing water use and confidence in doing so remains relatively stable compared to last year.

There is significant shift in attitudes towards water meters since communicating on the benefits (as opposed to just the object itself). 18-34 more likely to want be interested in the benefits of water meters, as well as the 'My World Cost Conscious' segment'.

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

Base: All respondents

■ 2021/2 ■ 2022/3 ■ 2023/4



Q1 2023/4: I'd be interested in having more frequent updates on how much water I'm using and how much it is costing

*Base: Total (1000) * statements only asked in Q1, Q2, Q3 of 2022/3 (750) All who have a water meter 2022/3 (493) 2021/2 (531)

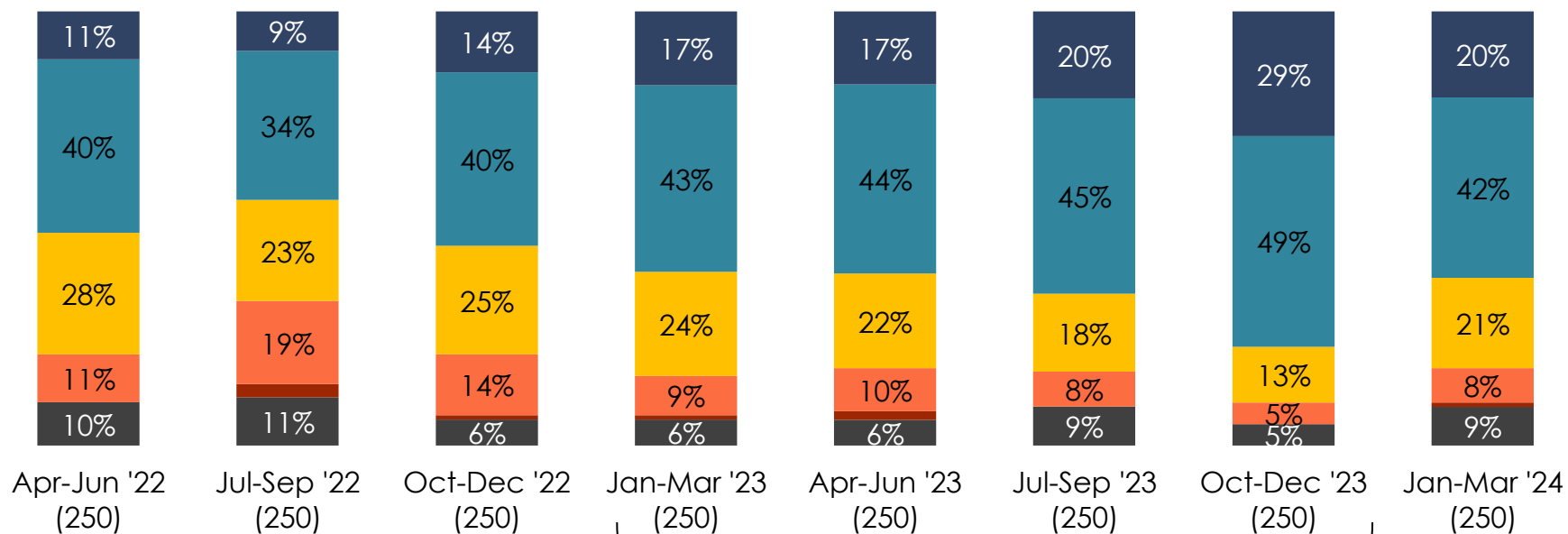
Impressions of water resources in region

After the extreme heatwaves during Summer 2022, impressions of water resources show a consistent trend across the following year or so, with more customers believing water supplies are plentiful in the region again – likely due to the high contrast in weather, particularly in Q3 where storms were more prominent than in previous years.

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

- Very plentiful
- Quite plentiful
- Neither nor
- Quite limited
- Very limited
- Don't know



Record breaking temperatures with heat health alerts issued in July

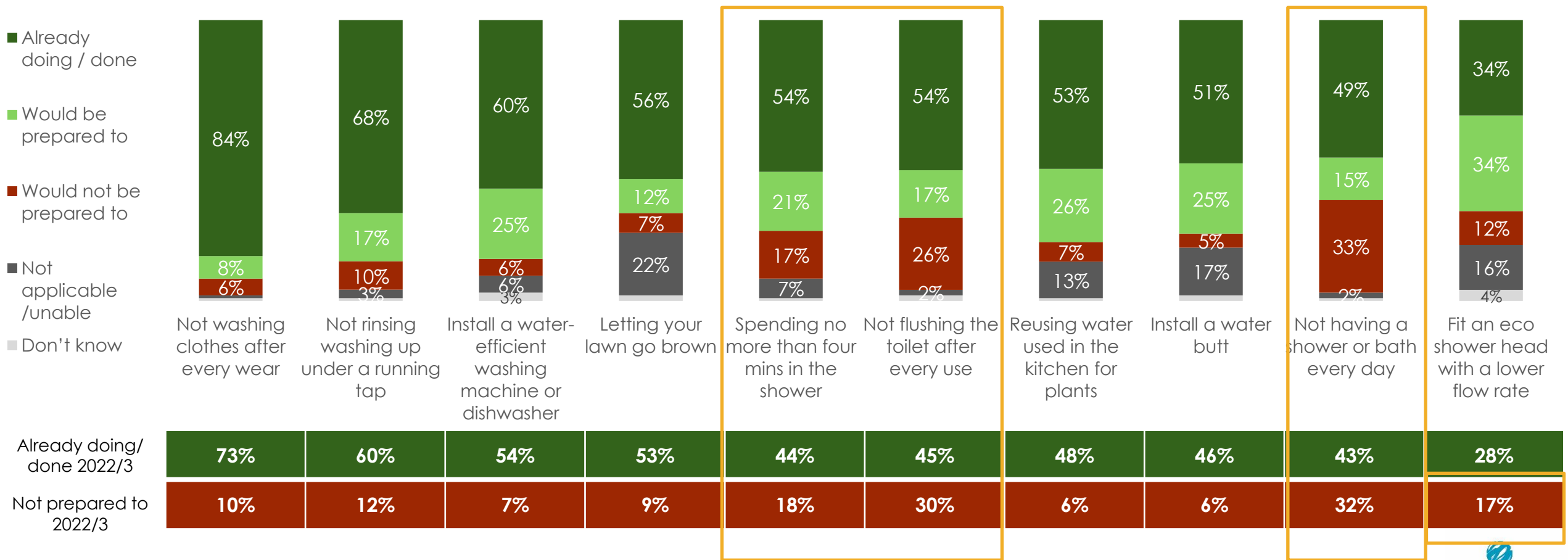


2023 rainfall was high for the UK overall – 11th wettest year since 1836

Water use behaviours

Significantly more customers claim to be taking actions to save water in a variety of ways compared to last year, with the vast majority claiming to not wash their clothes after every wear. While flushing and shower habits are harder to shift, there is greater openness to installing eco-shower heads versus last year.

QF2c/d. 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 2023/4 (1000)





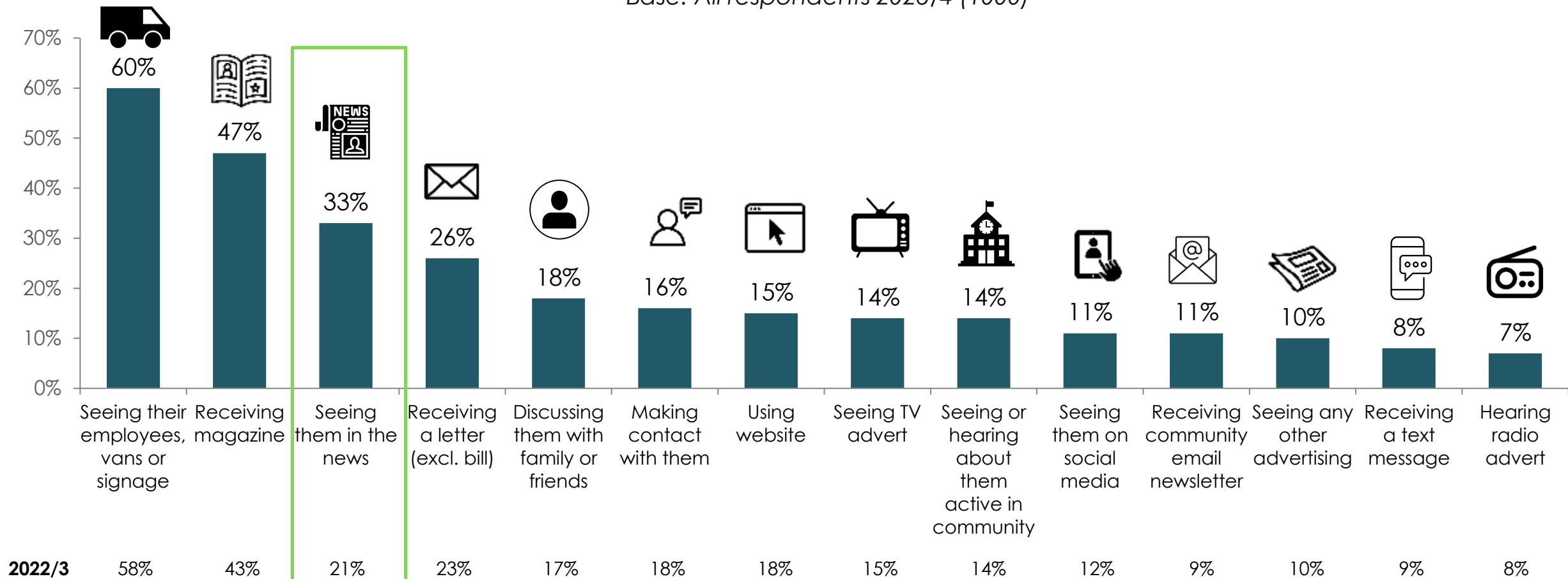
Communication

Prompted recall of touchpoints (2023/4)

Seeing Wessex Water 'out and about' is still the most widely recalled touchpoint. No major movements in prompted recall versus last year, apart from significantly greater recall seeing Wessex Water in the news, driven by the 'My World Cost Conscious' and 'Responsible Citizens' segments.

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

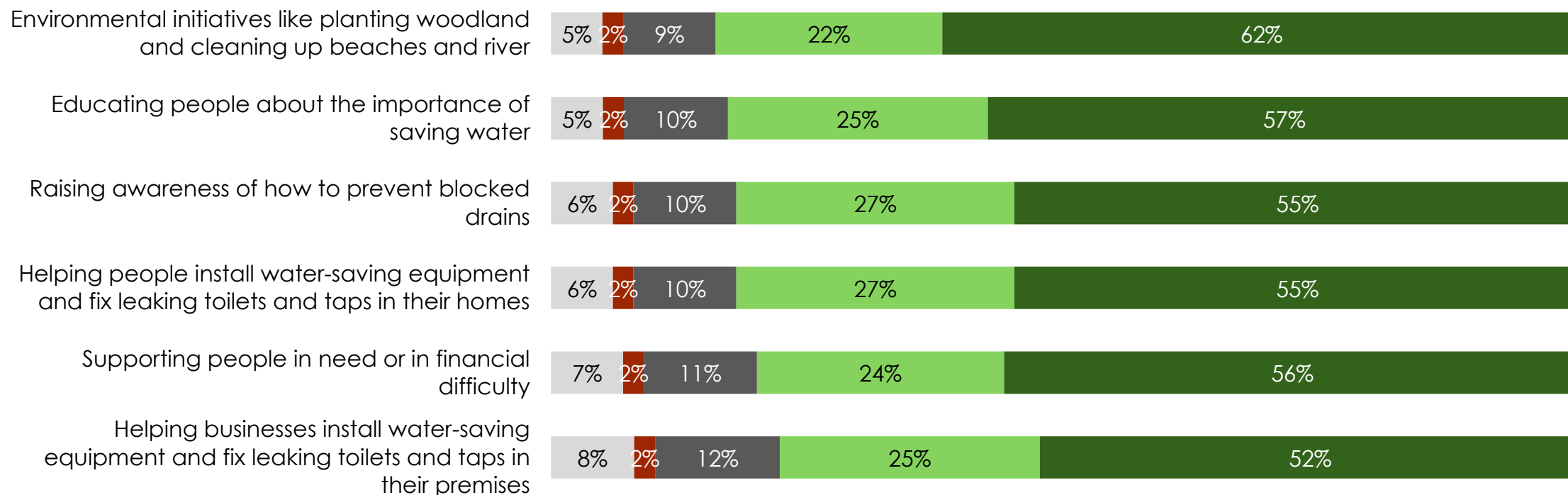
Base: All respondents 2023/4 (1000)



The majority of Wessex Water customers continue to strongly support the company partnering more closely with community organisations, particularly on environmental initiatives.

QF2d. How supportive are you of Wessex Water working more closely with local community organisations on each of the following initiatives...? Base: All respondents 2023/4 (1000)

■ Don't know ■ 0-3 ■ 4-6 ■ 7-8 ■ Strongly support (9-10)





Summary and moving forward

The wider cost of living context continues to put pressure on customers

1

Financial hardship is still reflected in the tracker, with most customers feeling their financial circumstances will remain the same or further deteriorate. Unsurprisingly, value for money and affordability metrics are significantly lower than last year – largely driven by Wessex and Bristol customers.

2

Satisfaction holds relatively steady – this is testament to the reliability of Wessex Water services (and direct experience of quality services, should there be issues).

- Over **4 in 10 customers believe they will be worse off** next year.
- Bill **affordability appears to be a volatile measure** with seasonal fluctuations but overall anxiety about bills is a longer-term trend. Bill anxiety was at its **highest point ever over the winter period** suggesting that people are thinking about bills more widely – specifically energy bills.
- The **value for money scores are also in a downward trend** – but again this seems to be **in response to the cost of living** rather than a reflection of actual bills or service received. Both the acceptability of water charges and satisfaction with the service have remained consistent over 2023-4.

There is growing awareness of the emotive topic of storm overflows

3

The water industry, particularly the topic of sewage overflows, remains prominent in the media, and awareness and negativity amongst Wessex Water customers towards the practice continues to grow.

4

Negative press appears to be posing a threat to the brand. Despite more feeling 'knowledgeable' about Wessex Water vs last year, fewer feel knowledgeable enough to comment on brand values. This reticence is largely driven by those aware of CSOs (and may partially explain the decline in satisfaction and trust amongst the 'Responsible Citizens' and 'My World Cost Conscious' segments).

- **Awareness of storm overflows continued to rise through 2023/4 but dropped in Q4** – perhaps reflecting the media frenzy beginning to abate, or the sustained press coverage focusing on to Thames Water specifically.
- Overwhelmingly **customers hear information about sewage in rivers from the news** – which has been critical of the industry as a whole – and **most believe that operating storm overflows is unacceptable**. Often perceived to be linked to underinvestment and rooted in companies being profit- not customer-led.
- Currently awareness of storm overflows is **not impacting overall sentiment** for Wessex Water, but there **does seem to be an impact on satisfaction** (being significantly lower among those aware). Furthermore:
 - Uncertainty/ambivalence relating to brand perceptions of Wessex Water e.g. caring about the community, caring about the environment, corporate ethics and responsibility (rated lower by those aware).
 - Water quality ratings have been in decline since summer 2022, coinciding with the storm overflow issue.

The role of corporate communications is becoming increasingly important.

5

Positive sentiment is holding up with customer communications and awareness of support services playing a part.

6

There is plenty of scope for Wessex Water to communicate more about storm overflows:

- Customers believe sewage leaks should be a top priority for Wessex Water to address and there is a substantial growth in spontaneous mentions regarding this topic.
- However, there is mixed level of awareness of what impacts the use of storm overflows and only a few are aware of Wessex Water's efforts to reduce the use of storm overflows.

- **Awareness of financial assistance and priority services (PSR) has increased** this year – and we see a **significant positive correlation between awareness of this support and overall satisfaction**. There is a strong argument to keep talking about these services to all customers.
- **Exposure to Wessex Water via a range of channels can be a driving force in the significant uplift in perceived knowledge** about Wessex Water (wider media coverage, while critical, may be helping to make corporate communications more relevant/noticed).
- Exposure to Wessex Water is **also linked to trust and positive sentiment** towards Wessex Water and remains consistent with 2022/3 despite the storm overflow context – indicating that Wessex Water is retaining some control of the message.
- **National media noise is clouding Wessex Water's own customer communications**. For instance, very few customers (1 in 10) report hearing anything about what Wessex Water are doing to stop storm overflow activity and there's a decline in customers agreeing Wessex Water are open and transparent (many saying they 'don't know').
- **Sewage in rivers and seas has become the top-of-mind issue needing improvement for a significant minority** (up to 20% spontaneously mentioning this during 2023/4 – a figure that has doubled since the previous year).
- **New tracker questions provide insight into the low level of understanding of the storm overflow issue** presenting opportunities for messaging that raises the awareness of what happens to rainwater and how domestic-level actions can help`



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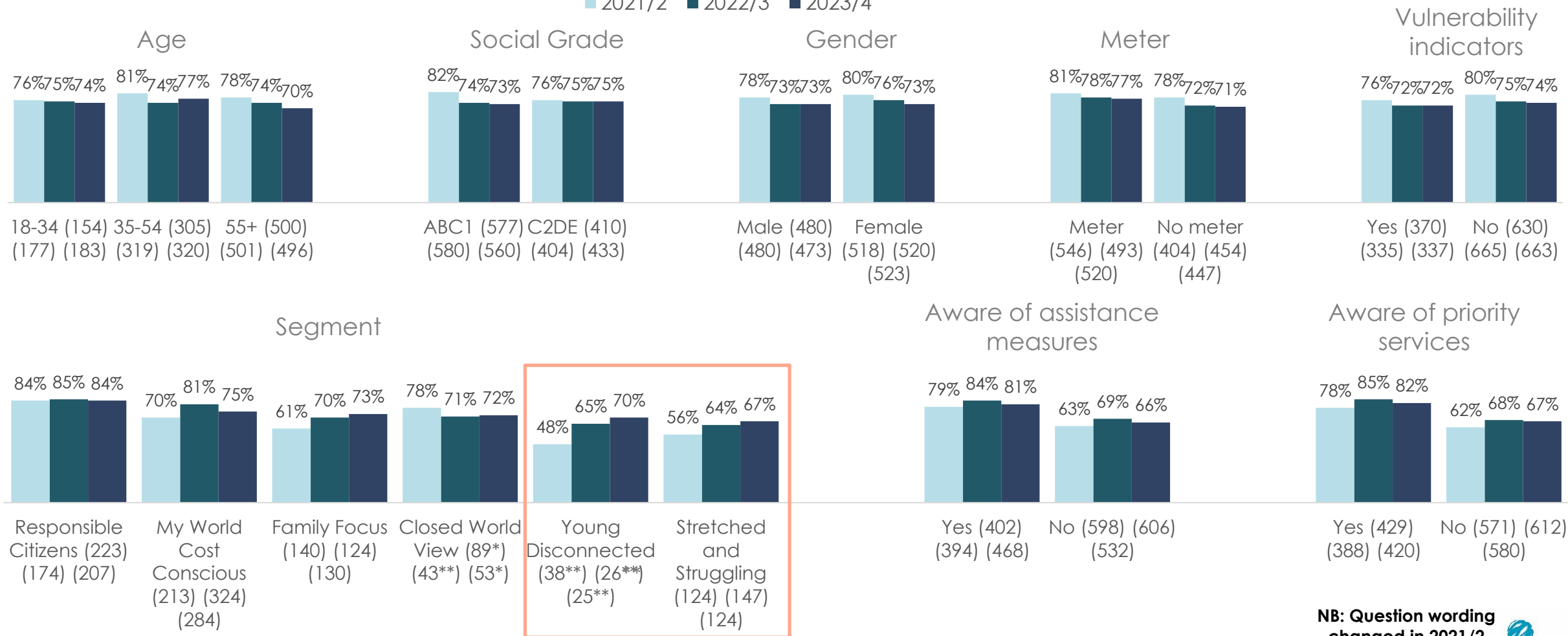
A kitchen sink with a gold faucet, hand sanitizer, and cleaning products on the counter. The background wall is cracked and peeling. A teal banner is overlaid across the middle of the image.

Appendix 1 – subgroup analysis

Satisfaction with Wessex Water has remained relatively consistent. The greatest increases in satisfaction have been from the groups most concerned with affording their bills.

Q15/11 Taking everything into account how satisfied are you with Wessex Water? % Satisfied (7-10) (Base: All 2021/2, 2022/3, and 2023/4)

■ 2021/2 ■ 2022/3 ■ 2023/4



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

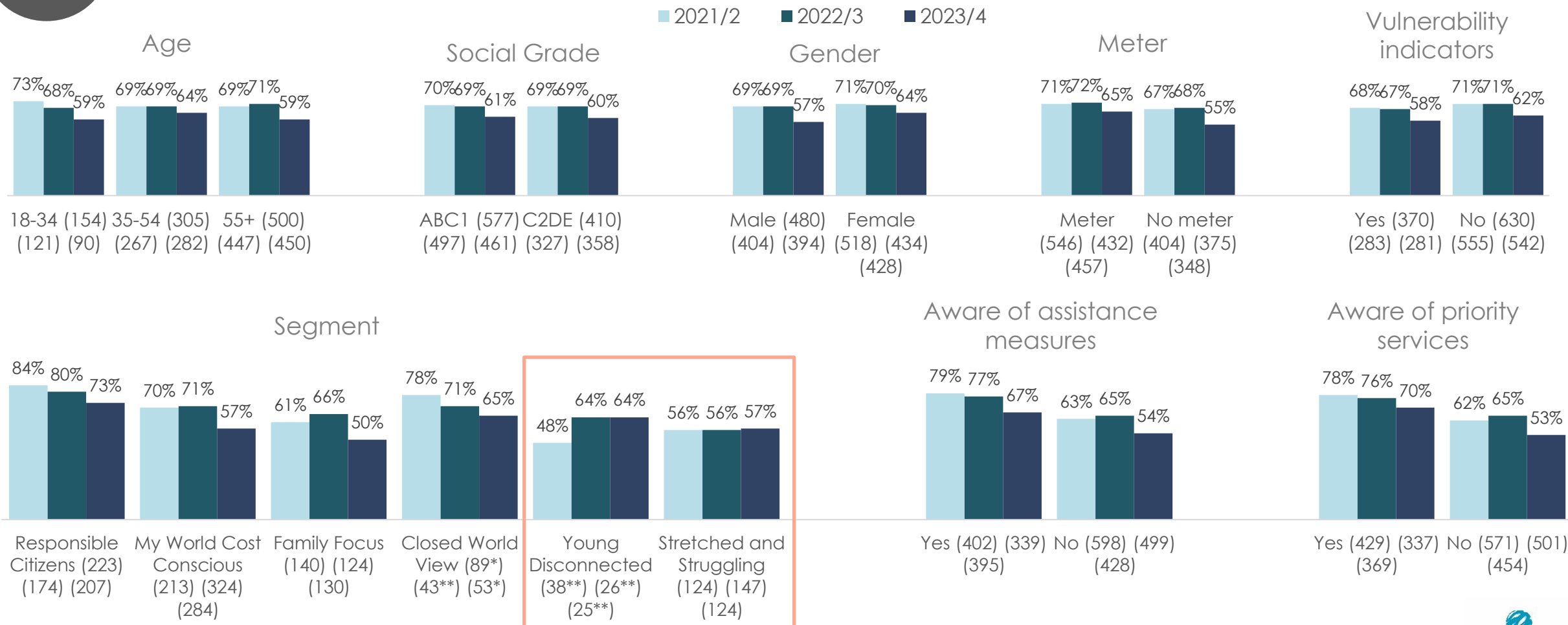
NB: Question wording changed in 2021/2



Value for money by key groups 2021/2; 2022/3; 2023/4

VFM ratings have dropped for all groups except those most worried about affording their bills.

Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? Base: All 2021/2 (1000), Those who pay bills 2022/3 (838), Those who pay bills 2023/4 (823)
% Very or fairly satisfied



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

Wessex Water priorities by segment 2023/4

	TOTAL (1,000)	Responsible Citizens (207)	My World and Cost Conscious (284)	Family Focus (130)	Closed World View (53*)	Young Disconnected (25**)	Stretched & Struggling (124)
Ensuring a reliable water supply	9.2	9.4	9.1	9.1	9.4	9.0	9.1
Preventing sewage leaks into / entering rivers and the environment ⁽¹⁾	8.9	9.2	8.8	8.8	9.4	8.4	8.9
Giving great customer service	8.5	8.7	8.4	8.5	8.5	8.1	8.4
Investing to address future extremes in weather like drought and flooding	8.4	8.8	8.3	8.3	8.7	7.7	8.2
Supporting customers who struggle to pay their bills	8.0	8.2	8.1	7.6	7.7	7.4	8.0
Improving local habitats for plants and animals	7.9	8.3	7.9	7.4	7.4	6.1	7.9
Reducing their own carbon emissions	7.7	8.0	7.8	7.1	7.6	5.7	7.6
Working with communities - for example local activities	7.5	7.6	7.5	7.2	7.6	6.6	7.6
Being innovative and quick to launch new technologies	7.3	7.7	7.3	7.0	7.4	6.7	7.3
Promoting social equality and equal opportunities	7.1	7.5	7.1	6.3	7.0	5.5	7.1

(1) New wording introduced part way through Q3 2021/2 fieldwork.

0.5+ ABOVE TOTAL

0.4 ABOVE TOTAL

WITHIN +/-0.3 OF
TOTAL

0.4 BELOW TOTAL

0.5+ BELOW TOTAL

Q7. How important do you think it is for Wessex Water to focus on each of the following things? Mean score (10 = 'a top priority' 0 = 'not a priority'). Base: All respondents 2023/4

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



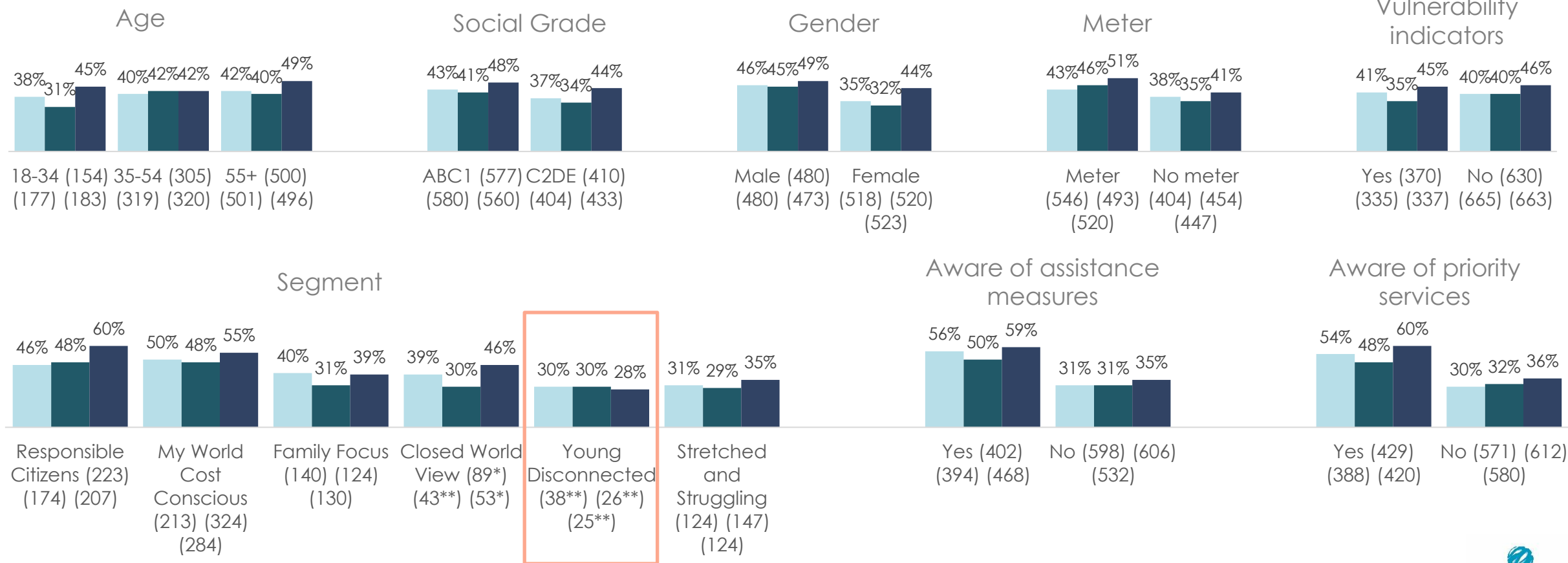
Knowledge by key groups 2021/2; 2022/3; 2023/4

Knowledge about Wessex Water has grown since last year, particularly among 'Responsible Citizens' and 'Closed World View'. 'Young and Disconnected' are the only segment where knowledge has decreased slightly.

Q6 How much do you feel you know about Wessex Water and what they do? (Base: All 2021/2, 2022/3 and 2023/4)
 % Know a lot or a fair amount



2021/2 2022/3 2023/4



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

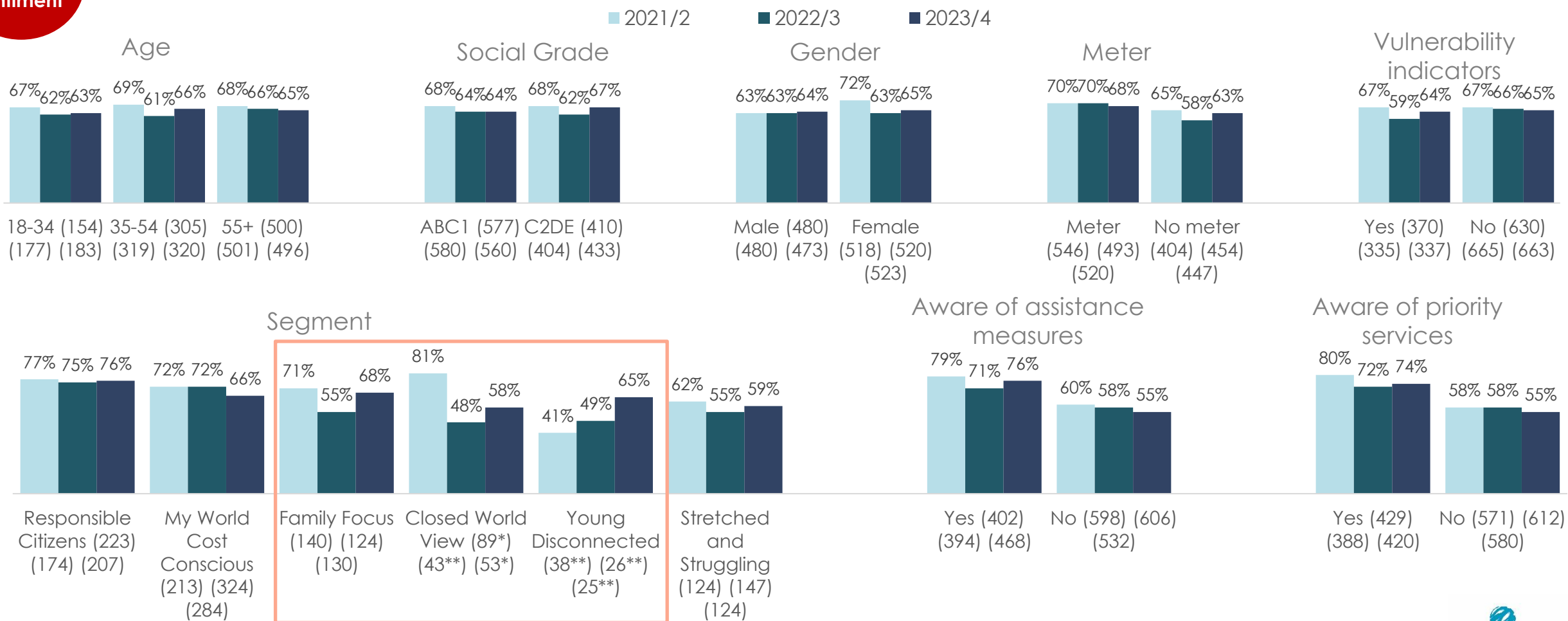
Sentiment by key groups 2021/2; 2022/3; 2023/4

Positive sentiment towards Wessex Water has remained relatively stable compared to last year. The greatest increases have been among the 'Family Focus', 'Closed World View', and 'Young & Disconnected' segments.



Sentiment

Q4. Now thinking about Wessex Water. Please tell us how do you feel about them overall? (Base: All 2021/2, 2022/3 and 2023/4) % Fairly/Very positive



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

Wessex Water imagery by segment 2023/4

'Responsible Citizens' and 'My World Conscious', who have the highest levels of knowledge, are most likely to endorse positive imagery about Wessex Water. Despite growing positive sentiment, 'Closed World View' and 'Young & Disconnected' are less likely to endorse positive imagery than other groups.

	TOTAL (1000)	Responsible Citizens (207)	My World and Cost Conscious (284)	Family Focus (130)	Closed World View (53*)	Young Disconnected (25**)	Stretched & Struggling (124)
Provide exceptional service	58%	68%	61%	54%	59%	45%	58%
Care about the environment	51%	62%	56%	45%	45%	35%	49%
They are easy to contact	50%	51%	55%	56%	48%	47%	52%
They are well regarded in your community	46%	47%	52%	49%	31%	41%	42%
Fix any problems (quickly)	45%	46%	49%	52%	32%	35%	51%
A responsible and ethical company that does the right thing	42%	47%	47%	39%	35%	16%	46%
Care about you and your community	41%	46%	43%	40%	45%	24%	37%
An open and transparent company	38%	39%	45%	35%	37%	36%	39%
Innovative and technologically advanced	34%	31%	42%	34%	31%	19%	36%

9% + ABOVE TOTAL

6-8% ABOVE TOTAL

WITHIN +/-5% OF
TOTAL

6-8% BELOW TOTAL

9% + BELOW TOTAL

Q8: Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? (% Agree 7-10) (Base: all respondents 2023/4) KEY: * Caution low base size ** Caution very low base size.

Wessex Water performance by segment 2023/4

As in previous years, 'Responsible Citizens' are most likely to have a more positive view of Wessex Water's performance than average. Compared to last year, performance ratings from 'Stretched & Struggling' have risen to become closer to average. Dissatisfaction with help to save water has grown among 'Family Focus' and 'Closed World View'.

	TOTAL (1000)	Responsible Citizens (207)	My World and Cost Conscious (284)	Family Focus (130)	Closed World View (53*)	Young Disconnected (25**)	Stretched & Struggling (124)
Making it straightforward for you to pay your bill in the way you prefer (bill payers only)	89%	95%	86%	87%	95%	96%	86%
Reliability of their services	76%	87%	76%	78%	83%	79%	76%
Providing clear and easy to understand information	75%	86%	78%	73%	78%	73%	65%
Keeping you up to date with their work in your area	65%	73%	70%	60%	60%	59%	62%
Helping you to save water (Wessex supply area only)	64%	74%	71%	49%	57%	30%	63%
The range of methods through which you can contact them	54%	59%	60%	55%	49%	51%	56%
Making it easy for you to deal with them	53%	57%	56%	64%	49%	47%	54%
Providing information on preventing sewer blockage	45%	47%	53%	42%	41%	19%	51%

9% + ABOVE TOTAL

6-8% ABOVE TOTAL

WITHIN +/-5% OF
TOTAL

6-8% BELOW TOTAL

9% + BELOW TOTAL

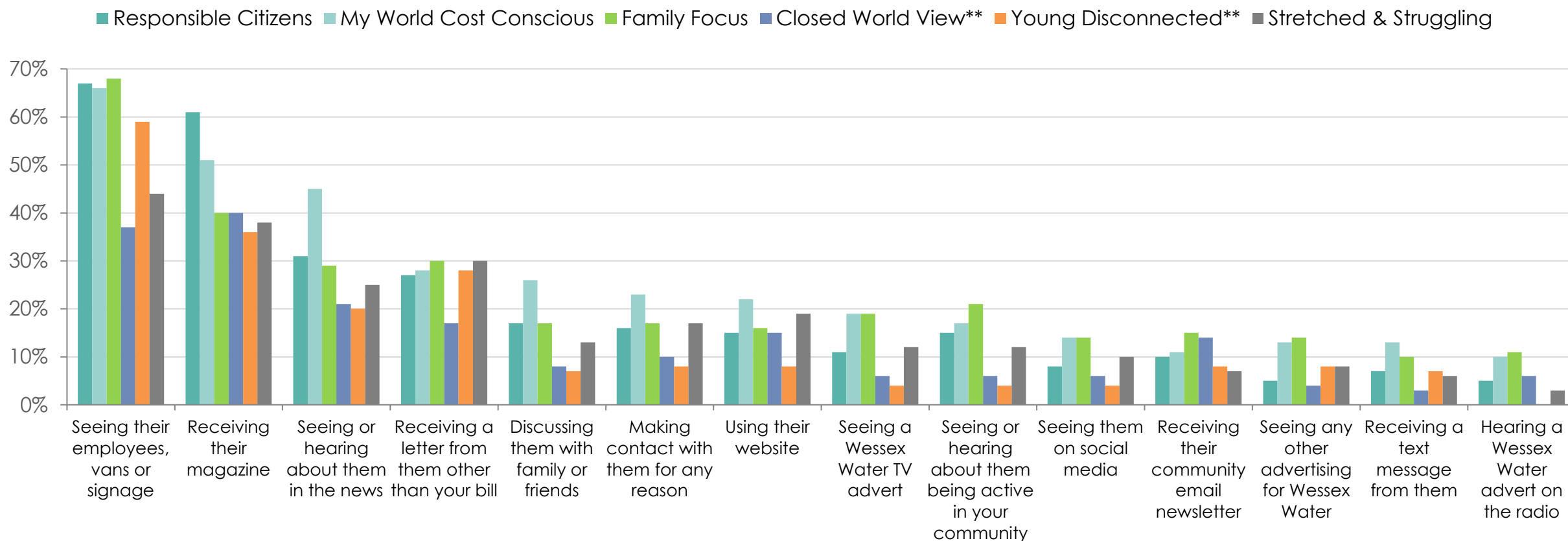
Q13. How would you rate Wessex Water's performance in the following areas? % rating 7-10 (10 = 'excellent' 0 = 'very poor'). Base: All respondents 2023/4 KEY: * Caution low base size ** Caution very low base size.

Prompted recall of Wessex touchpoints by segment (2023/4)

Highest recall for seeing employees/vans/signage and receiving their magazine. My World Cost conscious most likely to have seen Wessex Water on the news and

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

Base: All respondents 2022/3 in each segment



Base sizes (2022/3): Total (1,000); RC (207); MW&CC (284); FF (130); CWV (53*); S&S (124); YD (25**) KEY: * Caution low base size ** Caution very low base size

An aerial photograph of a coastal area. At the top, a long, narrow bridge or pier extends from the land into the ocean. Below the bridge is a wide, sandy beach with several people walking. The ocean is a deep blue-green color. In the lower half of the image, there is a large, modern building complex with a curved, white roof. The building has a central circular area and several smaller structures. There are cars parked on the street in front of the building. The overall scene is a mix of natural and built environments.

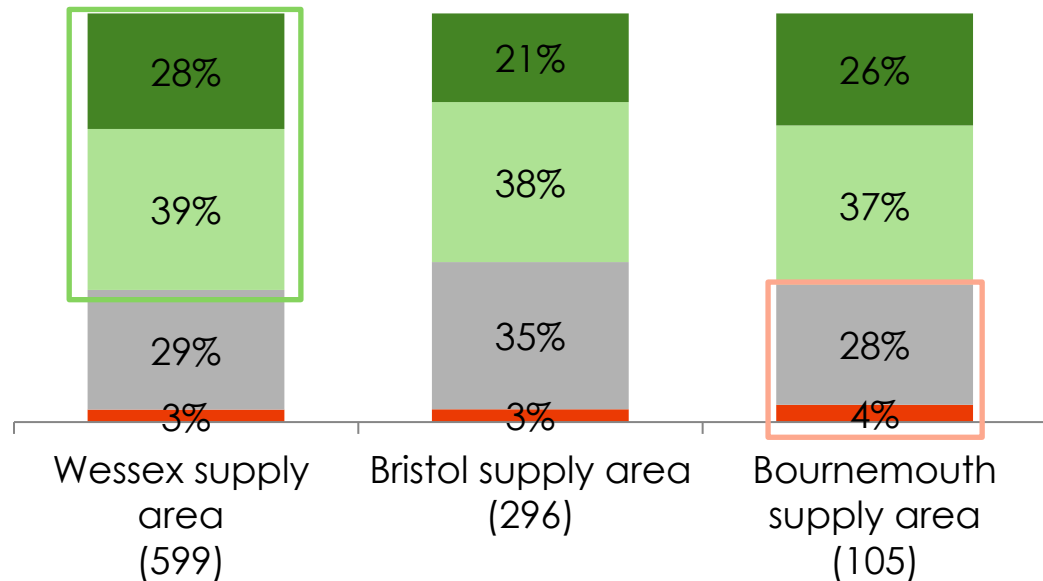
Appendix 2 – supply area analysis

Sentiment and Knowledge by supply area (2023/4)

Compared to last year, sentiment towards and knowledge about Wessex Water has increased in the Bournemouth supply area, becoming more consistent with Wessex and Bristol. Knowledge has also increased slightly in the Bristol supply area.

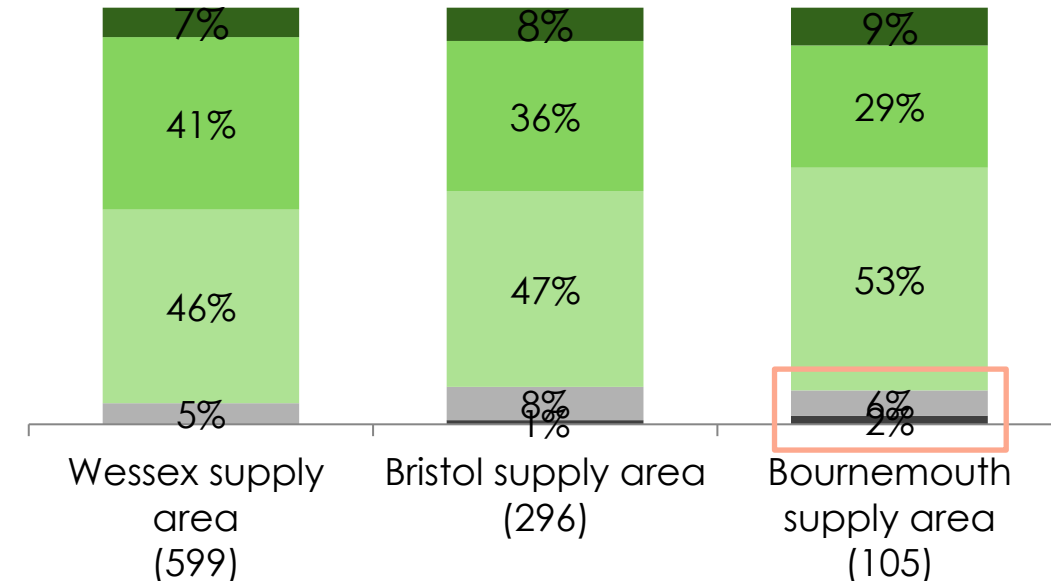
Q4: Now thinking about Wessex Water. Please tell how do you feel about them overall?

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



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

- Don't know
- A fair amount
- Nothing at all
- A lot
- A little








Wessex Water key measures by supply area summary 2022/3

Customers in the Bournemouth Water supply area are less likely to feel positive, knowledgeable and satisfied with Wessex Water than in the other two areas. They are also less likely to recall Wessex Water touchpoints in general. A priority for greater future engagement?

	TOTAL (1,000)	Wessex Water supply area (600)	Bristol Water supply area (296)	Bournemouth Water supply area (104)
 Sentiment (% very or fairly positive)	63%	68%	58%	49%
 Knowledge (% know a lot / fair amount)	39%	41%	37%	25%
 Satisfaction (% rate 7-10)	74%	79%	69%	63%
 Value For Money (% rate 7-10)*	69%	69%	73%	65%
 Trust Index	74.7	75.8	73.2	72.2
Mean number of Wessex Water touchpoints recall in the last 6 months	2.8	2.9	2.9	1.9

Wessex Water key measures by supply area summary 2023/4

VFM ratings and the Trust Index score in Bournemouth are now the highest across all supply areas, despite being the lowest last year. Other ratings have increased to become more consistent with other areas. Bristol now has the lowest positive sentiment towards Wessex Water.

	TOTAL (1,000)	Wessex Water supply area (599)	Bristol Water supply area (296)	Bournemouth Water supply area (105)
 Sentiment (% very or fairly positive)	65%	67%	59%	63%
 Knowledge (% know a lot / fair amount)	46%	48%	44%	38%
 Satisfaction (% rate 7-10)	73%	77%	66%	65%
 Value For Money (% rate 7-10)*	61%	60%	59%	68%
 Trust Index	74.5	74.6	73.5	76.9
Mean number of Wessex Water touchpoints recall in the last 6 months	2.8	2.9	2.9	1.9

A close-up photograph of a person's hands holding a brown leather wallet and a purple banknote. The person is wearing a dark blue jacket. The background shows an ATM machine with a screen and keypad. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Appendix 3 – Bill payers and non-bill payers 2023/4".

Appendix 3 – Bill payers and non-bill payers 2023/4

Bill payers versus non-bill payers: Awareness and attitudes 2023/4

	Total (1,000)	Bill payers (823)	Non bill payers (177)
DON'T KNOW who provides water (Q10)	9%	7%	20%
Awareness that Wessex provides sewerage service (Q9)	69%	73%	53%
Satisfied (7-10) (Q11)	73%	76%	64%
Positive sentiment to Wessex (7-10, fairly/very positive) (Q4)	65%	67%	53%
Know a lot / a fair amount about Wessex (Q6)	46%	49%	32%
<p>Priorities (Q7) – Bill payers significantly more likely to highly prioritise investing to address future extremes (81% vs. 72%), being innovative (62% vs. 48%), supporting customers struggling to pay their bills (73% vs. 65%), improving local habitats (74% vs. 67%), and working with communities (68% vs. 58%).</p>			
<p>Image statements (agreement) (Q8) Bill payers significantly more likely to agree with all descriptors</p>			
<p>Performance statements (Q13) Bill payers significantly more likely to agree with all statements except 'making it straightforward to pay your bill'</p>			
Agree charges acceptable (Q18)	61%	61%	51%
Aware of bill assistance (Q20r1)	46%	48%	39%
Aware of PSR (Q20r2)	41%	44%	27%

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS

Bill payers versus non-bill payers: Touchpoints and demographics 2023/4

	Total (1,000)	Bill payers (838)	Non bill payers (162)
Made contact with Wessex for any reason in last 6 months? (Q23)	16%	18%	8%
Used Wessex website in last 6 months?	18%	18%	6%
Recall receiving magazine in last 6 months?	47%	49%	39%
Recall seeing or hearing about Wessex in the news	33%	34%	31%
Agree 'I'd be interested in having more frequent updates on how much water I'm using and how much it costs' (QF1)	43%	43%	45%
Social Grade: ABC1	56%	56%	55%
Social Grade: C2DE	43%	43%	42%
18-34 years old	26%	17%	62%
35-54	31%	34%	18%
55+	43%	49%	20%

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS

A close-up photograph of a technical drawing on a grid background. A wooden pencil is positioned diagonally across the upper half of the image. A white ruler is visible in the lower-left corner. The drawing features various lines, arrows, and handwritten annotations. A teal horizontal band is overlaid across the center of the image, containing the text 'Technical Appendix'.

Technical Appendix

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

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).

Confidence Intervals at or near these percentage levels (at 95% level)

Total sample size	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	$\pm 5.9\%$	$\pm 9.0\%$	$\pm 9.8\%$

Differences required for significant at or near these percentage levels (95% confidence limits)

Size of samples compared	10% or 90%	30% or 70%	50%
1,000 and 1,000	$\pm 2.6\%$	$\pm 4.0\%$	$\pm 4.4\%$
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: addressing Ofwat's research principles

Standards for high-quality research:	How addressed in this project:
Useful and contextualised	This research is an ongoing study reflecting the views of a representative group of Wessex Water consumers – both bill payers and non bill payers. It continuously tracks how consumer priorities change over time, how their views of Wessex Water's services and communication evolves and also gives an opportunity for consumers to express in their own words where there is scope for improvement. Further, it is employed to gather views on important hot topics at appropriate moments in time, for example river water pollution, CSOs and domestic water use and views of water saving. The study provides quarterly updates and more detailed annual reviews which include analysis of specific Wessex Water customer segments, enabling targeted initiatives and communications strategies to be developed.
Fit for purpose	The research is administered and managed by independent fieldwork suppliers Perspective and Alligator Research. Individual responses are confidential and not identifiable to Wessex. Participants are recruited from two sources, to maximise representation: third-party online panels and telephone interviewing (random digit dial plus numbers from targeted lifestyle databases). The number of interviews (1,000 per year) is comfortably robust enough for quantitative analysis (i.e. using percentages and comparing sub-groups). Respondents are recruited randomly to a prescribed set of quotas on age, gender and supply area to ensure a representative profile. Identical quotas are applied both to the online and telephone interviews, and the ratio of interview method is controlled at 50:50 to control for 'method effect'. Data weighting based on known ONS demographics is conducted each Quarter to ensure comparability of data wave-on-wave.
Neutrally designed	Blue Marble's extensive experience in designing questionnaires ensures questions are not leading and answer options are balanced and unbiased. There is opportunity for spontaneous free text 'other' answers along with pre-coded options to capture a full range of answers. The survey uses randomised answer lists to avoid order bias.
Inclusive	Using both online surveying and telephone interviewing ensures we speak to a wide range of consumers, including those who may be digitally excluded or less confident with online forms, and those who default to online interaction. It includes both bill-payers (customers) and non-bill payers (consumers). Information about different forms of economic and other vulnerabilities are collected, and analysis of 'vulnerable' customers is conducted to understand where any differences lie.
Continual	The tracking involves continual research, reported every Quarter.
Shared in full	Wessex Water to advise
Ethical	Blue Marble is a company partner of the MRS. All of its employees abide by the MRS code of conduct and as such all of our research is in line with their ethical standards.
Independently assured	Wessex Water to advise

<https://www.ofwat.gov.uk/wp-content/uploads/2022/02/PR24-customer-engagement-policy.pdf>