Image Tracker

2024/25 Annual presentation

May 2025

Context | Performance | Trust | Storm overflows | Environmental attitudes | Water use | Communication

Photo by Luis Tosta on Unsplash

Methodology changes

During 2024/25, the sample was adjusted to reintroduce a portion of online panel sample and non-bill payers from Q3 onwards.

	'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 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. As a result, the segmentation applies onwards from Q3 and Q4 of 2024/25.

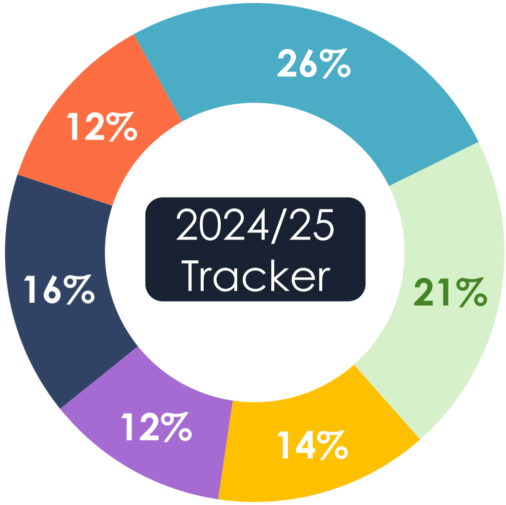
This segmentation is an updated version of one historically used in previous annual reports.

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

Carefree Consumers (13%)
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.

Responsible Environmentalists (25%)
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.

Pro-Planet Advocates (19%)
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.



Lifestyle Empowered (22%)
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.

Frugal Traditionalists (10%)
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.

Convenience Cost-Savers (12%)
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.

% in the chart represent the proportions found in the merged sample for Q3-4 24/25.
% in the description boxes represent proportions found in original segmentation research sample in November '24.

Demographic breakdown of key segments 2024/25

The new attitudinal and behaviourally based segments show some differences in demographics too - even if all are broadly in line with the average. For example, while both 'Responsible Environmentalists' and 'Pro-Planet Advocates' are united by their eco-conscious values, the former are almost all current bill payers and are more likely than others to be ABC1 - setting them apart slightly from their like-minded 'Pro-Planet Advocate' counterparts.

	Total (2126)	Responsible Environmentalists (359)	Lifestyle Empowered (284)	Convenience Cost-Savers (192)	Frugal Traditionalists (163)	Pro-Planet Advocates (221)	Carefree Consumers (166)
C2DE	40%	35%	33%	37%	51%	48%	46%
Bill payer	92%	97%	94%	82%	94%	81%	87%
Any vulnerability	46%	46%	40%	40%	54%	54%	45%
Total charges affordable	52%	58%	53%	40%	49%	40%	36%
Aware of financial assistance	41%	45%	42%	35%	44%	36%	35%
Aware of priority services	43%	52%	44%	39%	47%	33%	34%

+5% difference vs 2024/25 total	-5% difference vs 2024/25 total	Sig higher difference vs 2024/25 total	Sig lower difference vs 2024/25 total

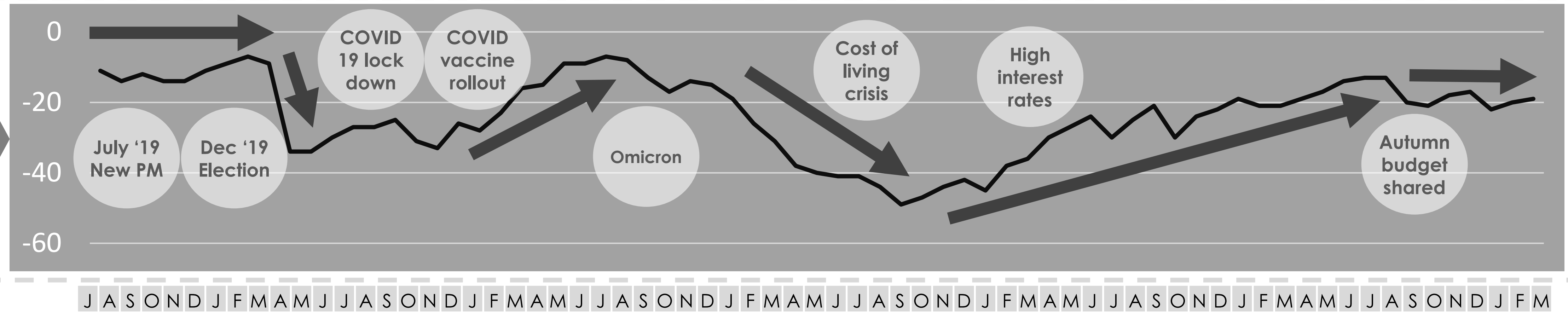
Wider context

Photo by Ben Grayland on Unsplash

Wider context

Growth in consumer confidence has stabilised since Q3 2024, despite political turbulence with a surprise general election. With Ofwat's draft determinations released in summer 2024, the water industry remains under scrutiny for profits/billing.

UK Consumer Confidence Index (Source GfK)



A	M	J	J	A	S	O	N	D	J	F	M
5 Apr Thames Water's parent company tells creditors it has defaulted on its debt	**22 May** Rishi Sunak announces General Election to be held in July **2 May** Local government elections	**15 Jun** Heatwave, with some areas of the UK reaching 30C	**4 Jul** General Election/ Labour wins	**1 Aug** Drop in mortgage rates	**Sep** News about post-election budget	**1 Oct** Ofgem energy cap increases & bills see increase **16 Oct** UK inflation falls to lowest level in 3 years	**19 Nov** Yellow snow warnings, disruptions across UK	**19 Dec** Ofwat publishes Final Determi-nations for PR24, bill increase focus in the news	**29 Jan** Environment Agency secures £22bn of environmental commitments from water companies	**18 Feb 2025** Six water companies appeal to CMA to be able to raise bills further	
6 Apr Storm Kathleen	**10 May** ONS publishes figures showing UK moves out of recession, with GDP rising by 0.6% in Q1	**14 Jun** UEFA Euro 24	**26 July** Olympics begin **1 Jul** Ofgem lowers energy price cap	**6 Aug** UK riots		**30 Oct** UK budget revealed, incl £40bn in tax rises and increased funding for NHS	**7 Nov** BOE cuts interest rates by 0.25%	**7 Dec** Storm Darragh, red weather warning	**Jan** High rainfall leads to high ground-water levels and river flows **27 Jan** University of Portsmouth study finds that UK water industry is using deception tactics **30 Jan** Ofwat release average bills press statement – flurry of news articles follow	**24 Feb 2025** Water (Special Measures) Act 2025 launched	**6 Mar 2025** River Action plans to sue Ofwat over bill increases

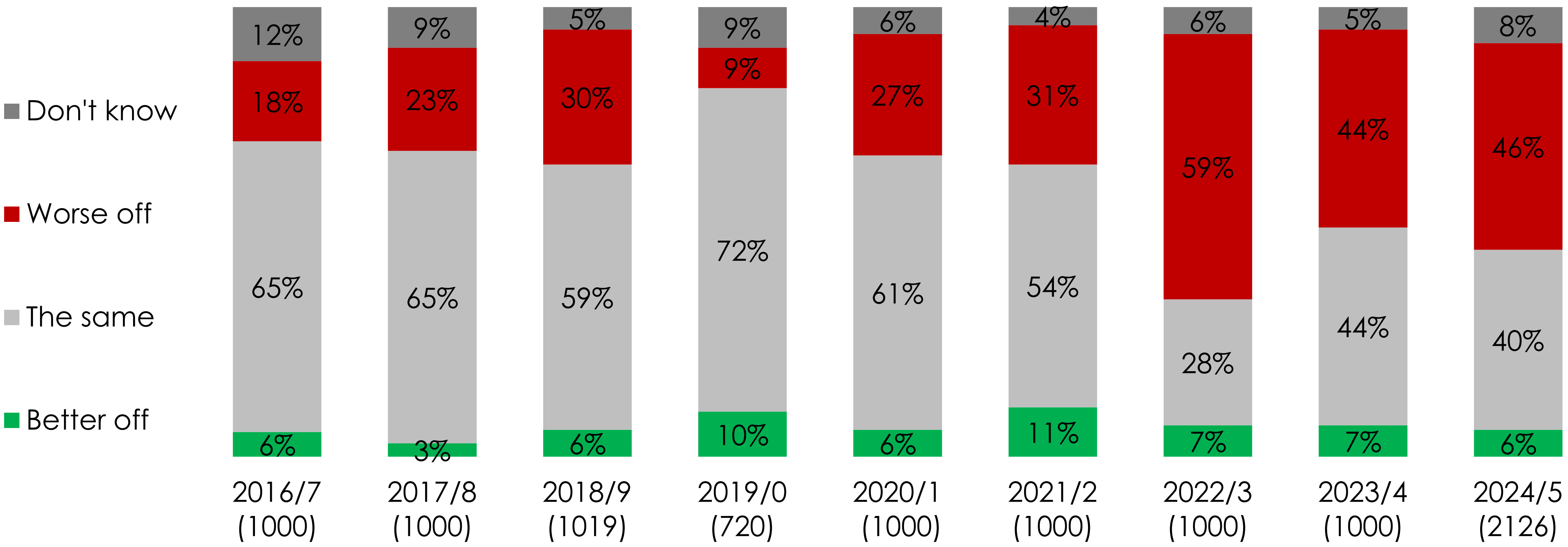
general election

Ofwat

Financial outlook

Two years on from the national financial downturn in late 2022, financial outlook for the next 12 months remains similar to last year. However, we see a slight increase in uncertainty and pessimism as the long-term impact of the on-going cost of living crisis prevails.

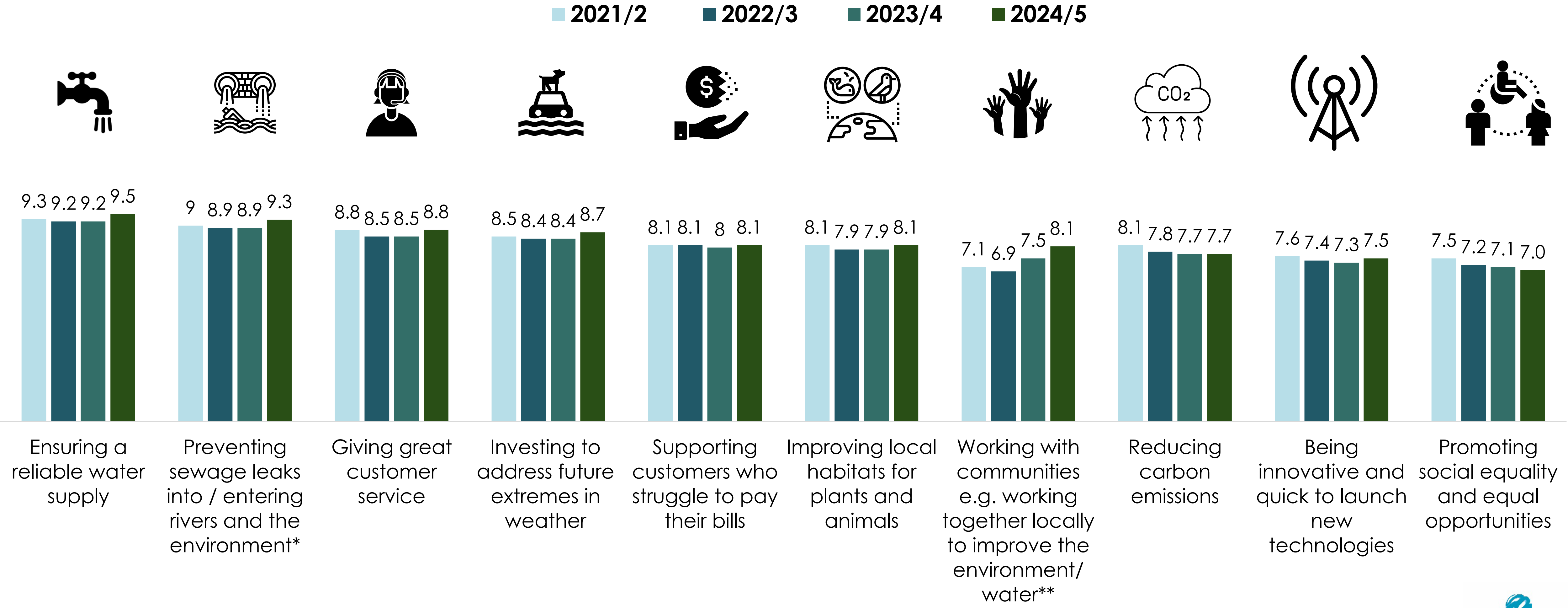
QF5. Do you expect your household to be better off, worse off or about the same in the next 12 months? Base: All respondents



What do consumers say Wessex Water should focus on?

Ensuring a reliable water supply and preventing sewage entering the environment remain the main priorities. 'Working with communities' has seen another increase this year (now rising above 'reducing carbon emissions'), suggesting a broader eco-effort appeals to customers.

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), 2024/25 (2126)*



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

Looking ahead, what can be improved?

Mirroring 2023/4, nearly a quarter of Wessex Water's customers spontaneously cite the 'environment' as a key area for improvement. While bill prices, alongside supply, are in the top three issues mentioned, they are much less front of mind than environmental concerns when asked about areas to do better.

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 (1000) and 2022/3 (1000) 2023/4 (1000) 2024/5 (2126)*

	2024/5	23/4	22/3	21/2
Environmental	23%	23%	16%	10%
Water supply (incl water quality, hardness, pressure)	7%	4%	6%	5%
Price and bills	6%	6%	6%	7%
Communications (better comms / engagement)	6%	5%	4%	7%
Infrastructure and works (incl leaks, disruption)	5%	9%	11%	7%
Sewerage service	4%	6%	2%	2%
Water saving (incl teach people how to save water)	3%	1%	4%	3%
Service (general)	2%	1%	2%	3%
Accessibility (Easier to contact; website; modernise)	2%	1%	1%	2%
Social (help elderly / poorer)	1%	2%	1%	2%
Metering	1%	0%	1%	2%
Nothing	9%	7%	9%	14%

Performance

Photo by Christin Hume on Unsplash

Dashboard 2024/5: Satisfaction and financial metrics decrease this year. Brand health metrics, however, have remained stable.

Core performance

- VFM: 55% (Rate 4-5) – significant decrease
- Satisfaction: 69% (Rate 7-10) – significant decrease
- Affordability: 56% (Agree charges affordable) – significant decrease

Satisfaction drivers

MOST IMPORTANT

Reliability (% who rate 7-10)	78%	No change
Charges acceptable (% agree (bill payers and non bill payers))	46%	Significant decrease
Care about environment (% who rate 7-10)	49%	No change
Well regarded in the community (% who rate 7-10)	40%	Significant decrease
Range of contact methods (% who rate 7-10)	60%	Significant increase
Clear and easy information (% who rate 7-10)	72%	No change

Brand health

- Knowledge: 44% (Know a lot / fair amount) – no change
- Sentiment: 7.1 (Mean score) – no change
- Trust: 74.1 (Index (100)) – no change

Hot topics

CSOs

- 61% Aware of CSO releases – significant decrease
- 84% Heard in news coverage ever, *if aware*
- 34% Think local river / sea water is poor quality – significant increase

Water use

- 73% 'Make effort' to save water – directional decrease
- 31% Not sure how can reduce use – significant increase
- 50% Interested in more updates on usage and cost** – significant increase

Economic

- **46%** think they will be worse off in 12 months – no change
- 32% Worry about affording water bill – directional increase

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

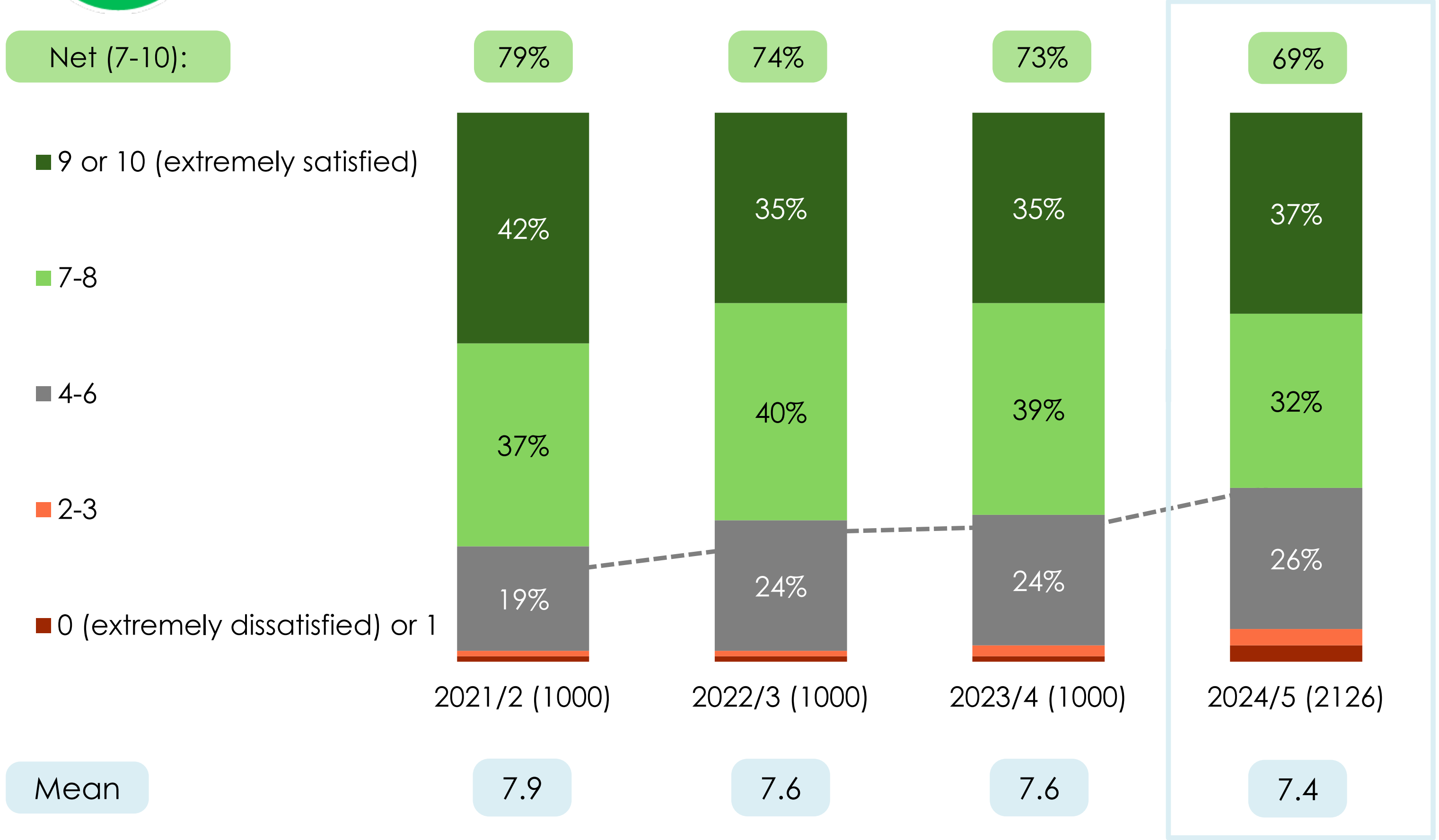
Changes are 2024/5 vs. 2023/4

Overall satisfaction

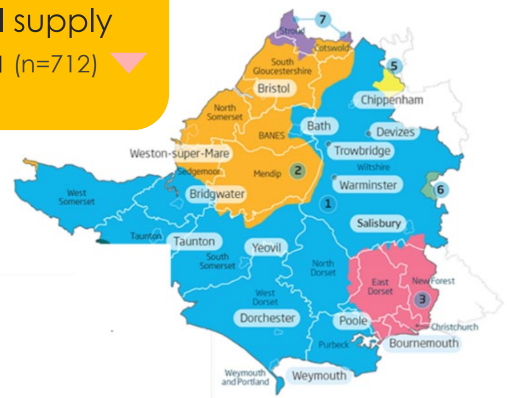
Overall satisfaction for 2024/5 continues to decrease, now at 10% points lower than 2021/2. Similarly, regional satisfaction drops by 4-6% points each, though remains highest in the Wessex supply area than in Bristol and Bournemouth supply areas.

Satisfaction

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



60% satisfied in **Bristol** supply area (n=712)



73% satisfied in **Wessex** supply area (n=1194)

61% satisfied in **Bournemouth** supply area (n=209)

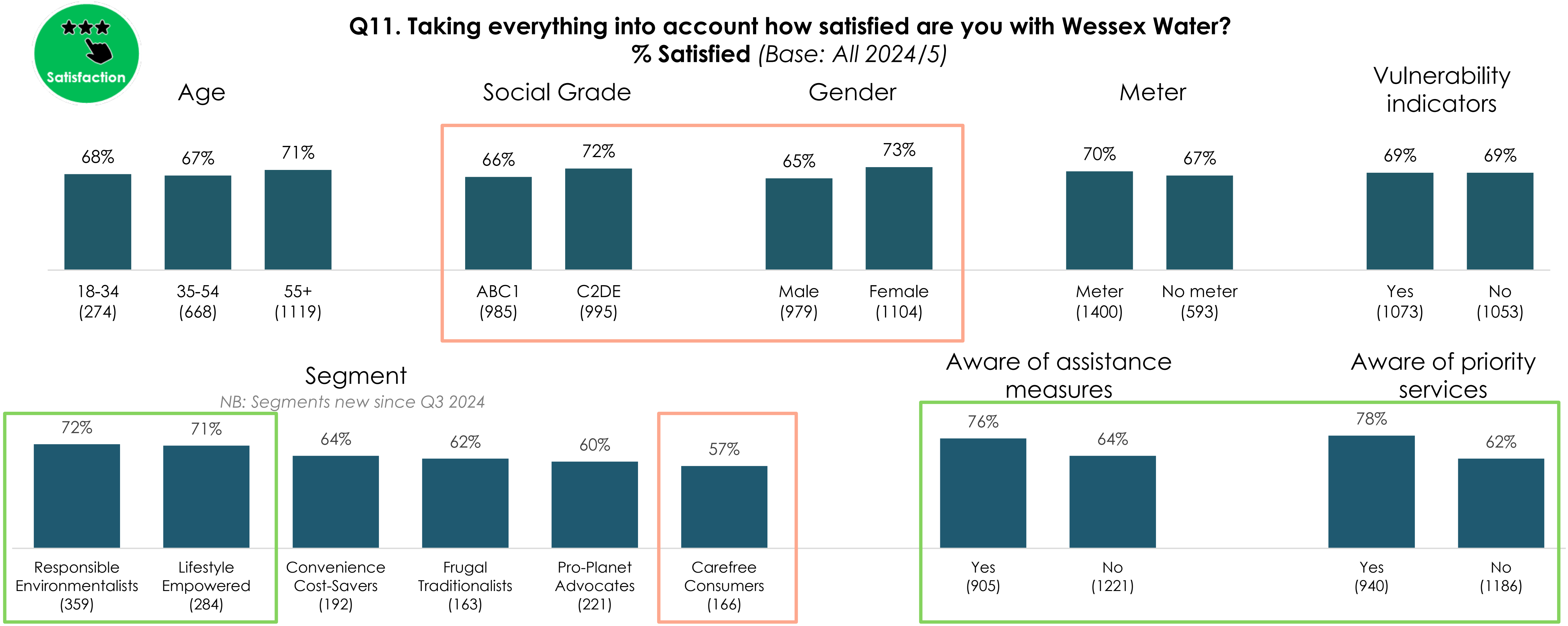
Satisfaction 2024/5 by supply area

Key: Significant increase, Significant decrease, Directional increase, Directional decrease, No change (less than 3% pt. change) — **Changes are 2024/5 vs. 2023/4**

Overall satisfaction by key groups

'Responsible Environmentalists' and 'Lifestyle Empowered' are most satisfied segments. Awareness of priority services and assistance measures continues to correlate with higher satisfaction. Age related differences in satisfaction are no longer evident in 2024/25, but a social grade and gender gap has appeared.

Q11. Taking everything into account how satisfied are you with Wessex Water?
% Satisfied *(Base: All 2024/5)*

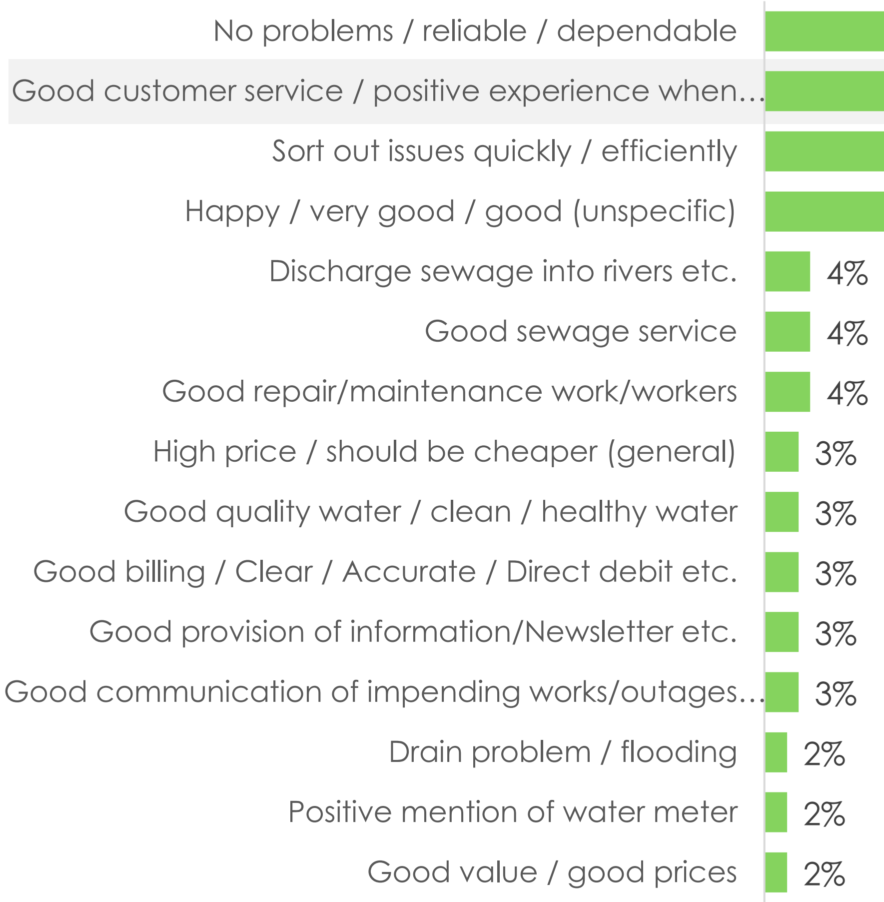


What drives satisfaction?

The absence of any problems is key, followed by good customer service – which sees a significant increase in mentions. Mentions of high prices are significantly higher among less satisfied customers, perhaps reflecting increased impact of this on customer perceptions. Sewage discharge is the most top-of-mind issue among less satisfied customers.

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

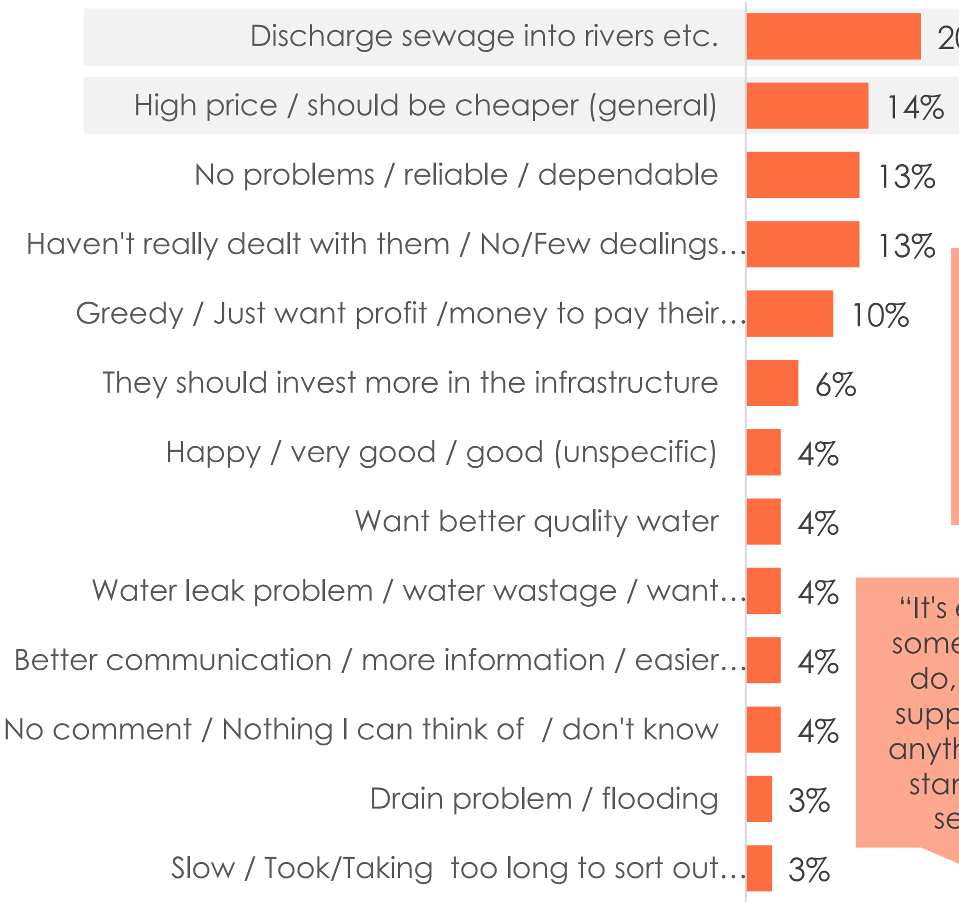
Those who are satisfied (score 7-10) *Base: 1453*



"Their customer service is amazing. Prompt response to problems reported and courteous, helpful employees."

"We have had no problems with our water supply or billing during the 15 years that we have lived here."

Those who are less than satisfied (score 0-6) *Base: 673*



"Price too high for the service provided and all water companies are putting raw sewage into our water courses."

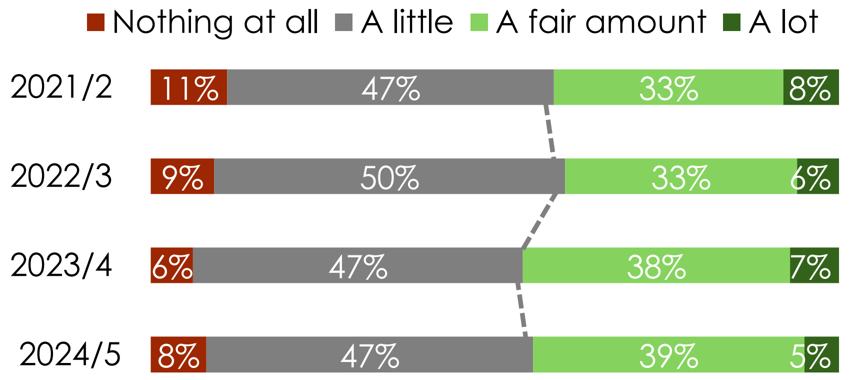
"It's expensive and it's something we have to do, someone has to supply it but there isn't anything exceptionally stand out about the service offered."

Knowledge and sentiment

Knowledge

Perceived knowledge about Wessex Water remains stable after the peak last year.

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



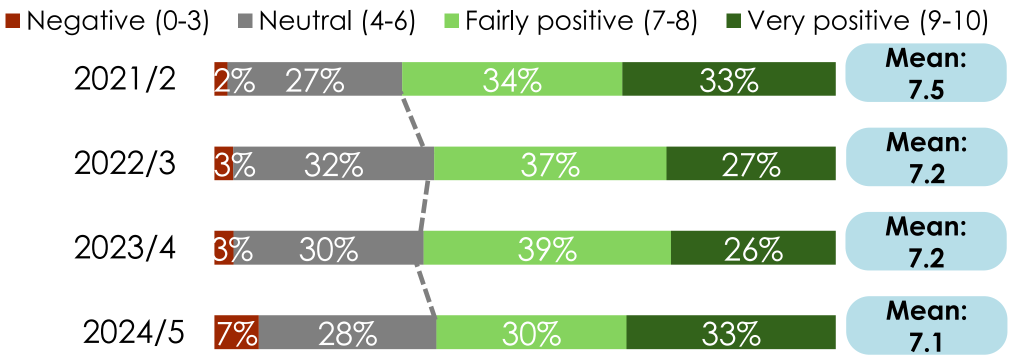
Seeing Wessex Water active in the community, on TV or radio adverts, and exposure to content on social media particularly correlate with higher perceived knowledge about Wessex Water.

Those aware of support services also feel they know about Wessex Water and what they do too.

Sentiment

The proportion of customers feeling **positive** towards Wessex Water is largely consistent with the previous two years.

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



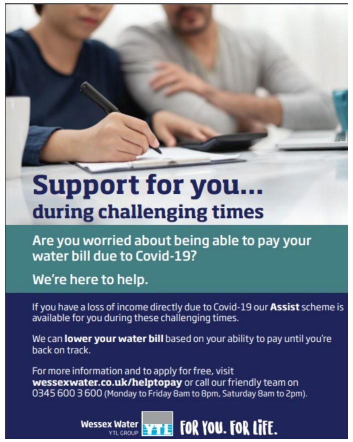
Many of the touchpoints most associated with increased knowledge also seem to boost sentiment. In particular, radio adverts, being active in the community, text message and social media exposure appear to enhance positive sentiment of Wessex Water.

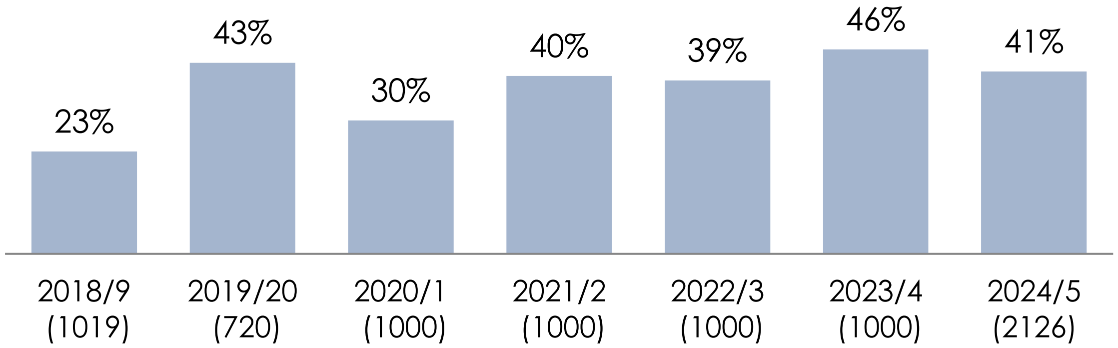
Those who say they know more about Wessex Water are significantly more positive too, as well as those aware of support services and those living in the Wessex supply area.

Awareness of Assistance Measures

In a context of falling financial metrics this year, awareness of assistance for customers struggling to afford bills has also dipped back down this year (but still in line 21/22 and 22/23). Awareness of priority services rises slightly over the past couple of 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)

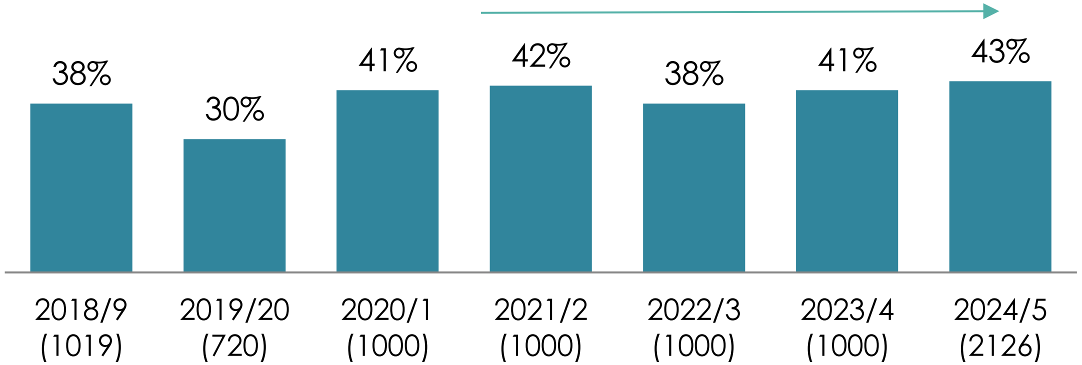




41%
Aware for 2024/5
(43% of bill payers)

Lower amongst those who find charges unaffordable (35%) – the group who are the priority to communicate this to. This is similar to last year (33%).

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)



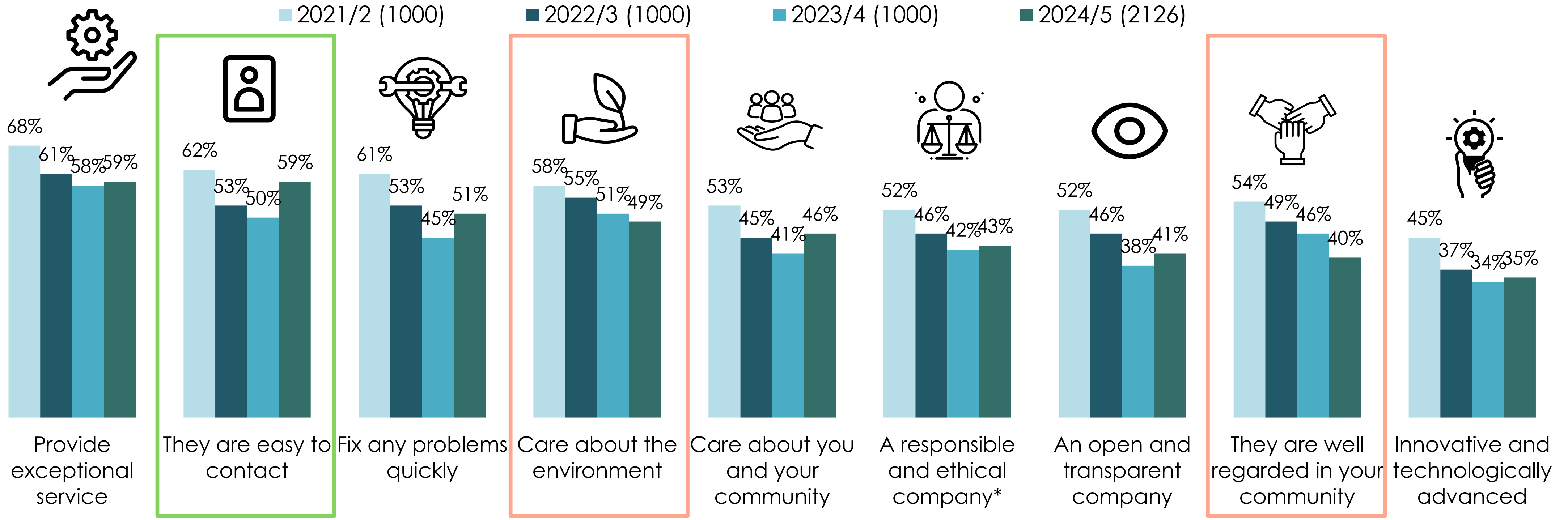
43%
Aware for 2024/5
(44% of bill payers)

50% of those who exhibit vulnerabilities are aware – a small improvement on last year (46%), but there remains scope to increase this.

Image of Wessex Water

Impressions of Wessex Water improve (slightly) across most metrics this year. However, perceptions of being 'Well regarded in your community' and 'Care about the environment' continue to decline.

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)*



	Provide exceptional service	They are easy to contact	Fix any problems quickly	Care about the environment	Care about you and your community	A responsible and ethical company*	An open and transparent company	They are well regarded in your community	Innovative and technologically advanced
Don't know 2024/5	**15%** (+2)	**27%** (-8)	**27%** (-8)	**23%** (+3)	**24%** (-11)	**31%** (-3)	**33%** (-5)	**32%** (+3)	**40%** (-4)
0-3 NET 2024/5	**6%** (+2)	**4%** (+1)	**6%** (+2)	**9%** (+3)	9% (+5)	**9%** (+3)	**7%** (+3)	**8%** (+3)	**5%** (+2)

Wessex Water – Performance dimensions

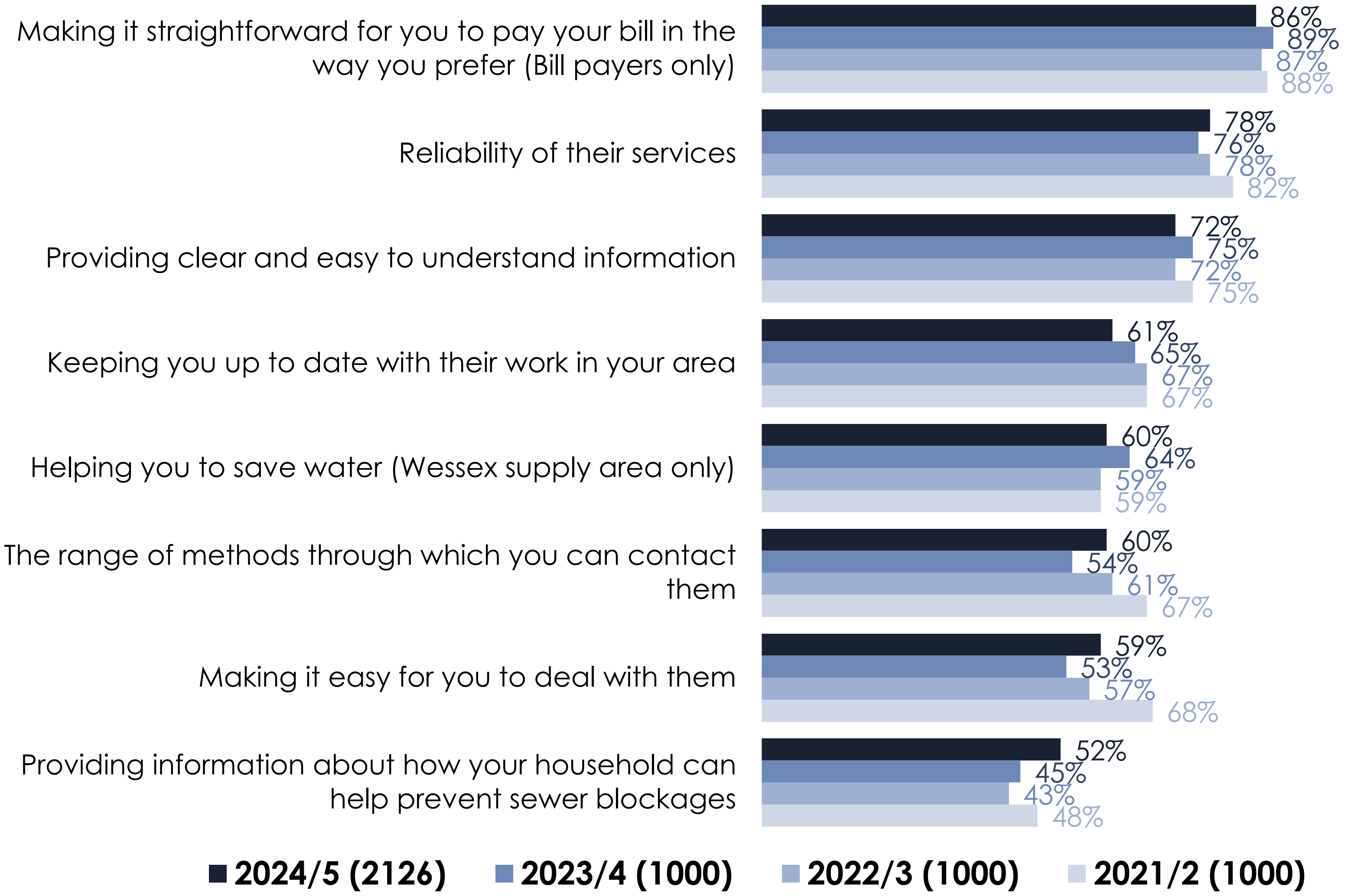
Performance

Perceptions of Wessex Water's performance are variable for 2024/5, but there are positives for this year.

After declining for the past 3 years, 'Reliability of services' and 'Range of contact methods' (key drivers for satisfaction) buck the downward trends. 'Making it easy to deal with them' also picks up after falling since 2021/2.

Ratings for 'Information to prevent sewer blockages' also increase – with the proportion of 'Don't knows' dropping significantly.

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



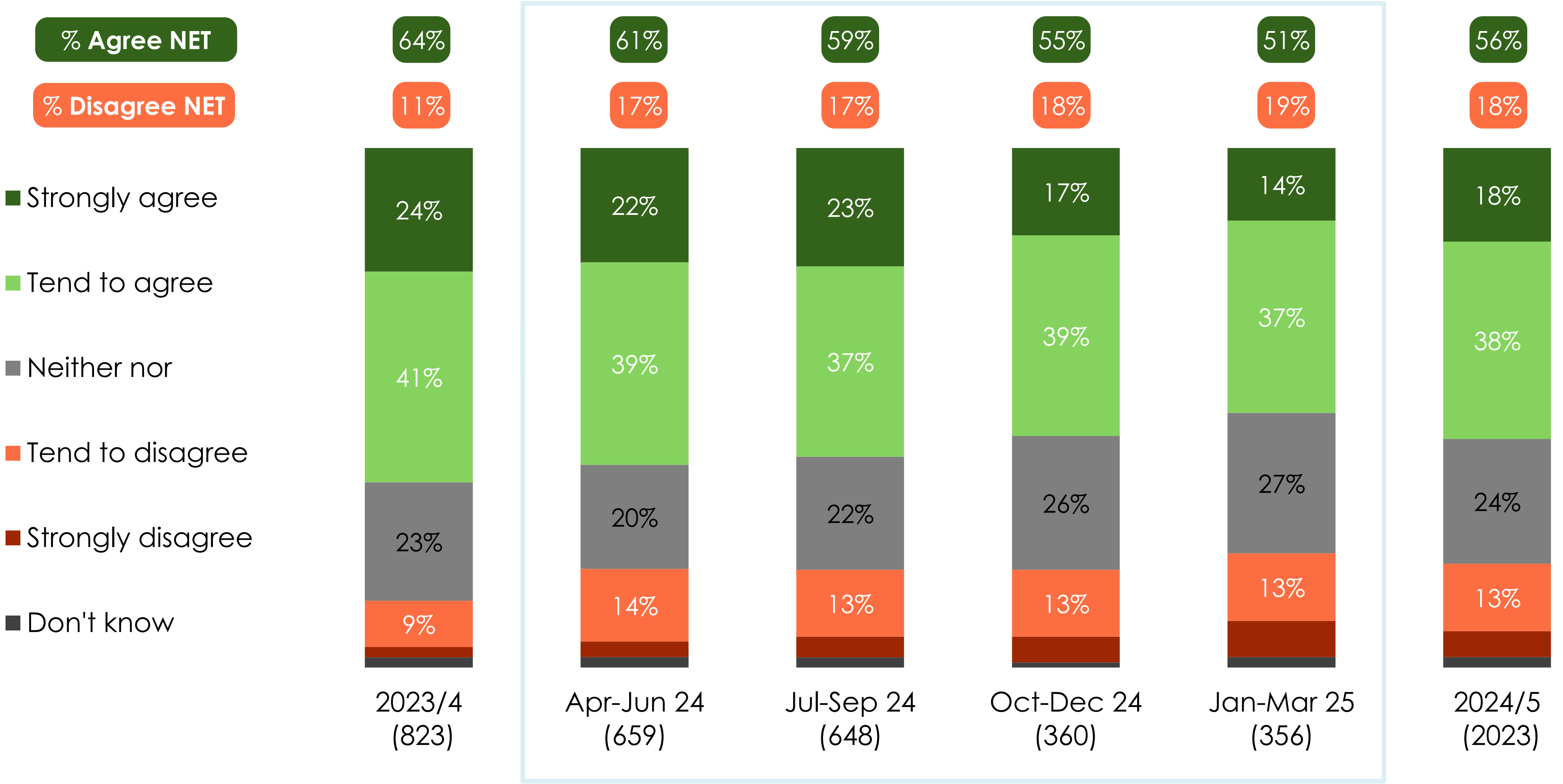
Don't know 2024/5
3% (+1)
9% (-3)
10% (-1)
17% (+1)
17% (+2)
24% (-6)
24% (-8)
24% (-14)

The proportion of customers agreeing their water and sewerage charges are affordable continues to decline for 2024/5, with customers feeling the long-term effects of increased costs of living. News (and lots of it) about upcoming bill increases may well have influenced customer perceptions.

Afforda bility

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

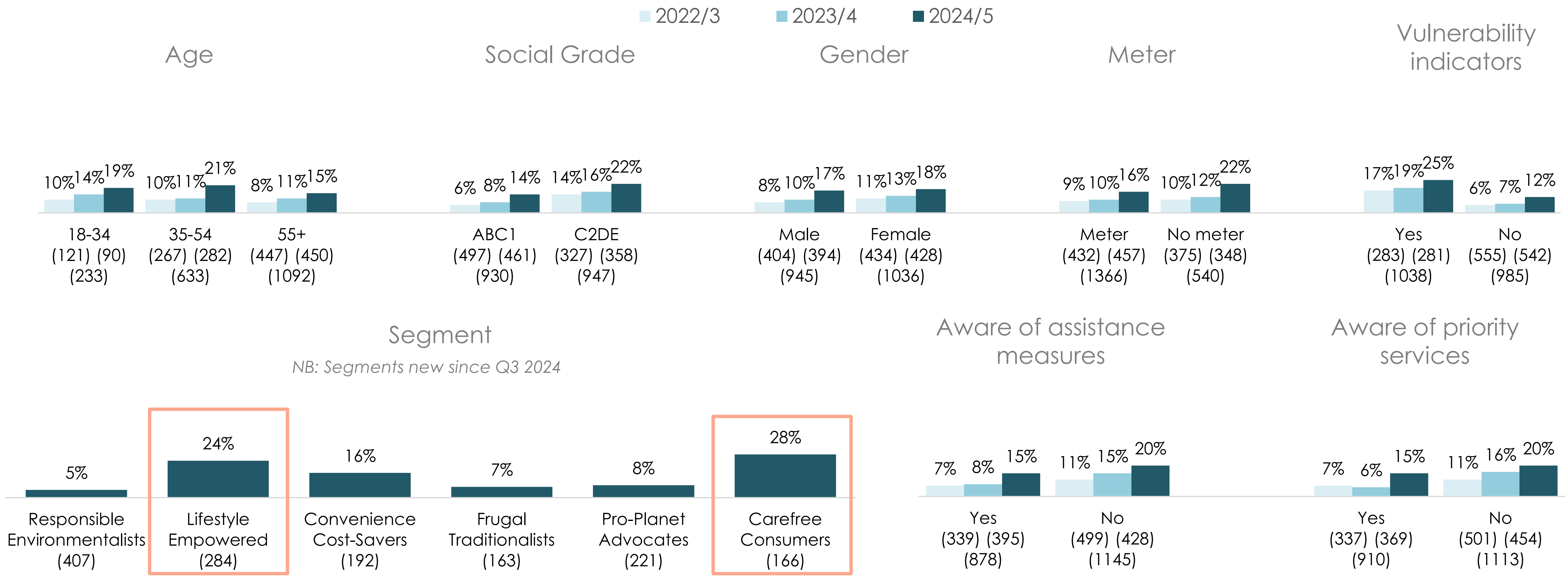
Q17. How much do you agree or disagree…? *Base: All bill payers*



Unaffordability levels by key groups 2022/3; 2023/4; 2024/5

In line with declining satisfaction and financial indicators, affordability worsens significantly across most demographics this year. The ‘Carefree Consumer’ and ‘Lifestyle Empowered’ segments are the most likely to perceive their bills as unaffordable, while ‘Responsible Environmentalists’ are the least likely to report affordability concerns.

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), 2024/5 (2023)*

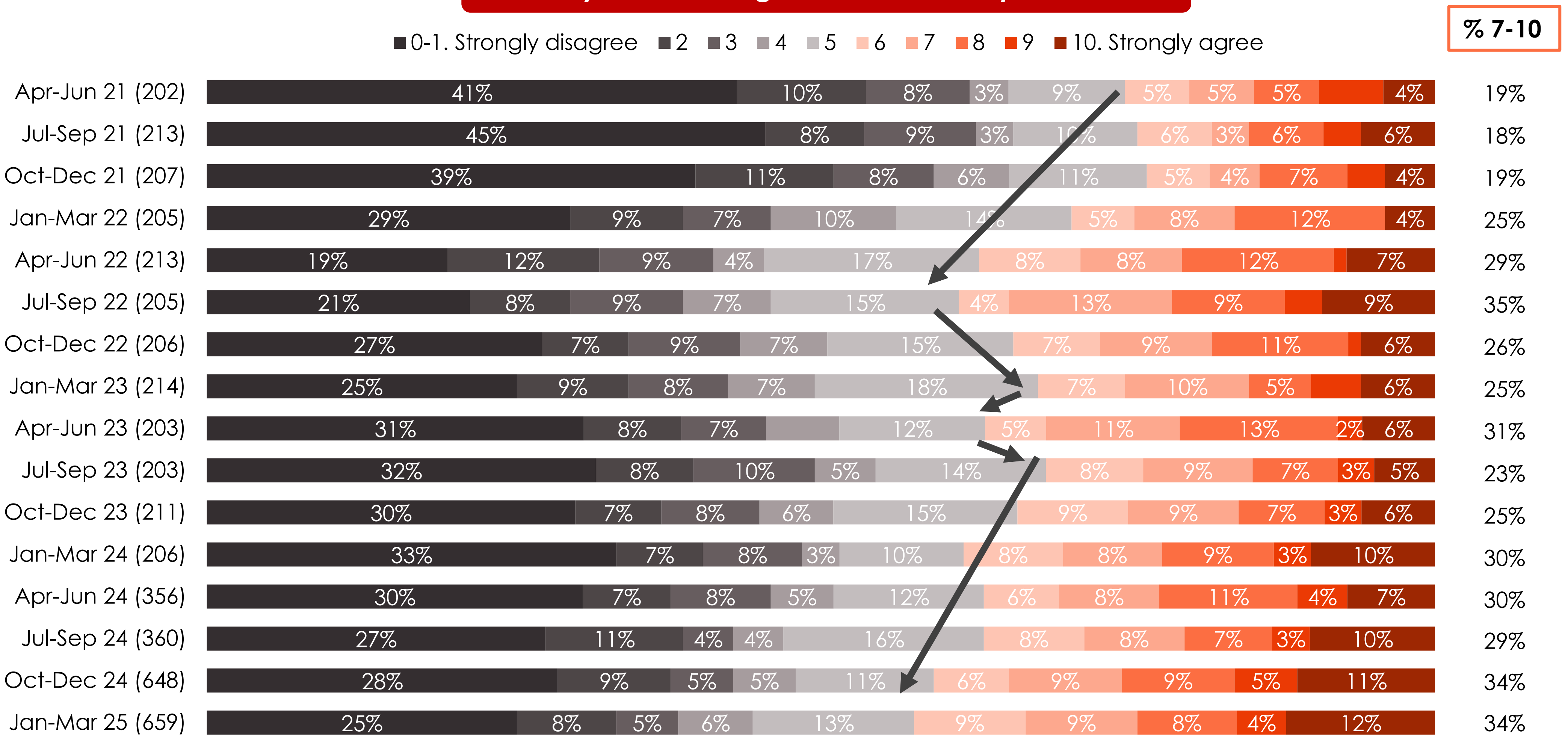


Anxiety about affording the water bill

Overall anxiety about bill affordability increases significantly in 2024/25, reaching its highest level since summer 2022. For the most part, it has risen steadily since summer 2023.

Q15. How strongly do you agree or disagree…? *Base: All bill payers (2,023)*

I worry about being able to afford my water bill

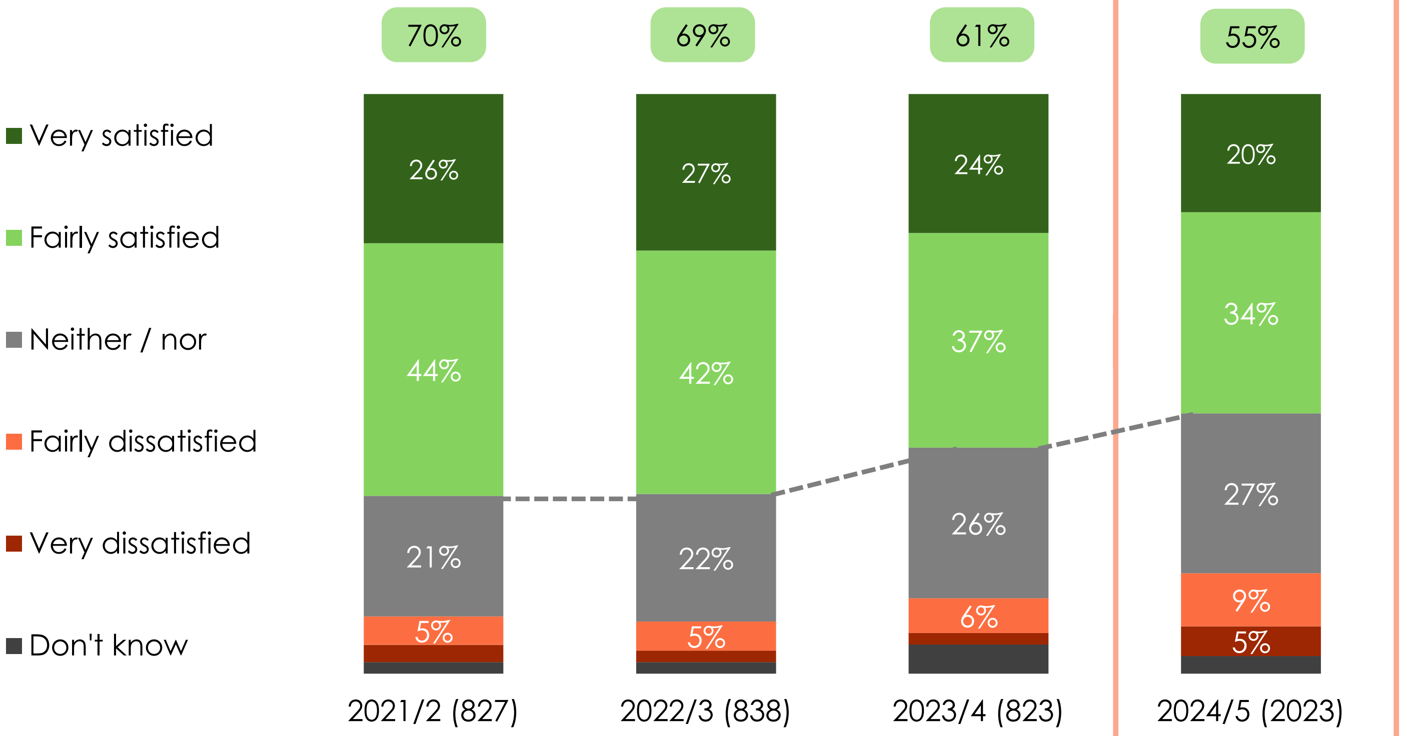


Overall value for money

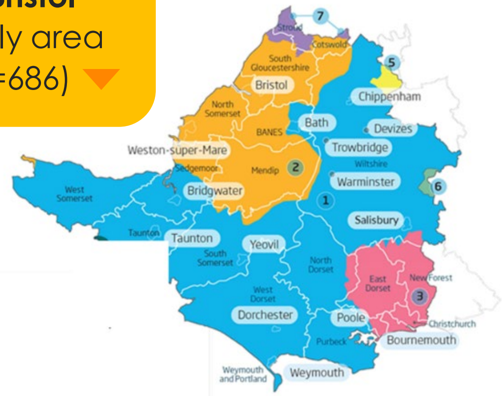
Satisfaction with **value for money** continues on a downward trend, reaching its lowest level yet. With a significant decline by 18%, Bournemouth takes a massive hit to this satisfaction rating this year – going from most satisfied to least.

VFM

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



52% satisfied in **Bristol** supply area (n=686)



56% satisfied in **Wessex** supply area (n=1153)

50% satisfied in **Bournemouth** supply area (n=183)

VFM 2024/5 by area (tel & online)

Key: Significant increase / Significant decrease | Directional increase / Directional decrease | No change (less than 3% pt. change) | **Changes are 2024/5 vs. 2023/4**

Focus on Trust

Photo by Tina Dawson on Unsplash

Measuring Trust

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**.

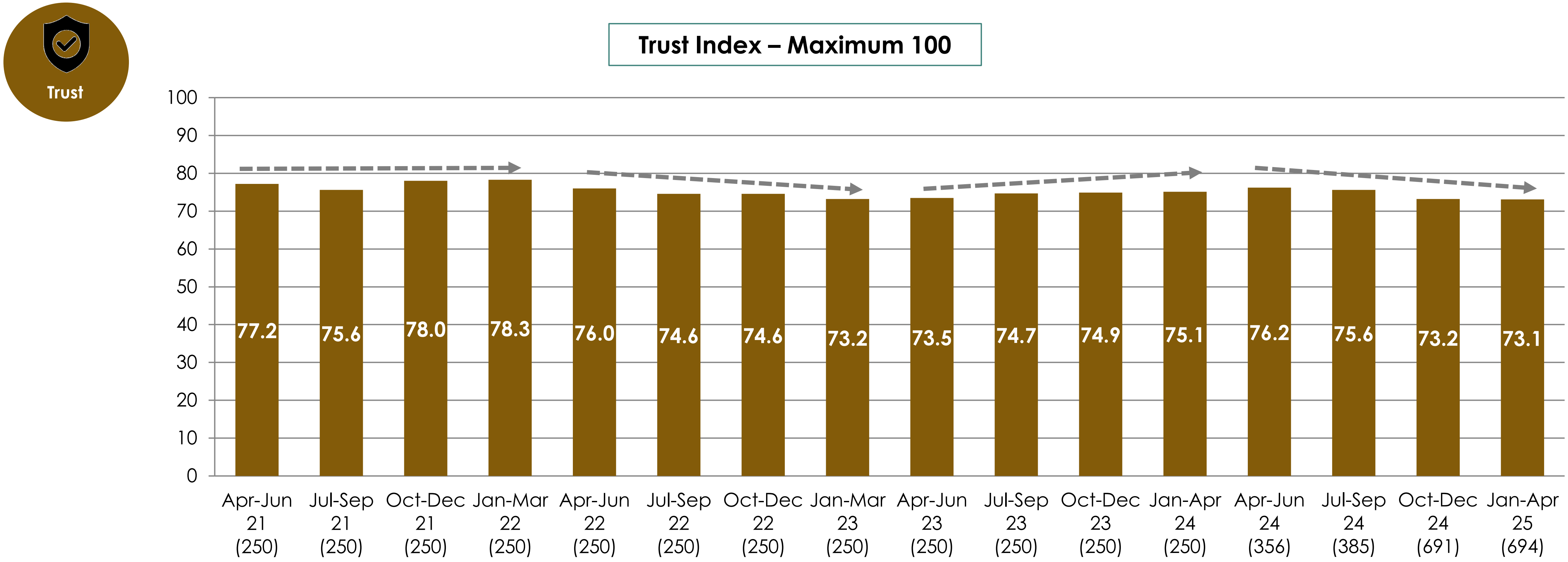
Ofwat's 2022/24 research with Savanta focusing on trust also includes a number of similar measures.

Trust dimensions	Tracker measures included	Ofwat 'Customer Spotlight: People's views and experiences of water' (conducted by Savanta)
Customer ethos	• Care about you and your community • Making it easy for you to deal with them	• Act in the interest of customers • They are more interested in profits than providing a good service
Competence and capability	• Provide exceptional service • Fix any problems quickly	• I trust them to fix a problem quickly
Reliability and dependability	• Reliability of their services • Easy to contact	• Provide a good service
Transparency	• Open and transparent company • Providing clear and easy to understand information	• Trust them to keep me informed about service choices that could help me
Ethics	• A responsible and ethical company that does the right thing • Care about the environment	• Act in the interests of the environment • I trust them to do what's right for the environment
Brand validation	• Well regarded in your community	• 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.

Trust Index

After a modest rise in trust during 2023/24 - peaking in Q1 of this year at its highest level since early 2022 - Wessex Water's Trust Index has steadily declined. It now stands at its lowest quarterly score on record, marginally below the previous low in January 2023. While the annual average is lower than last year's, it remains broadly comparable.

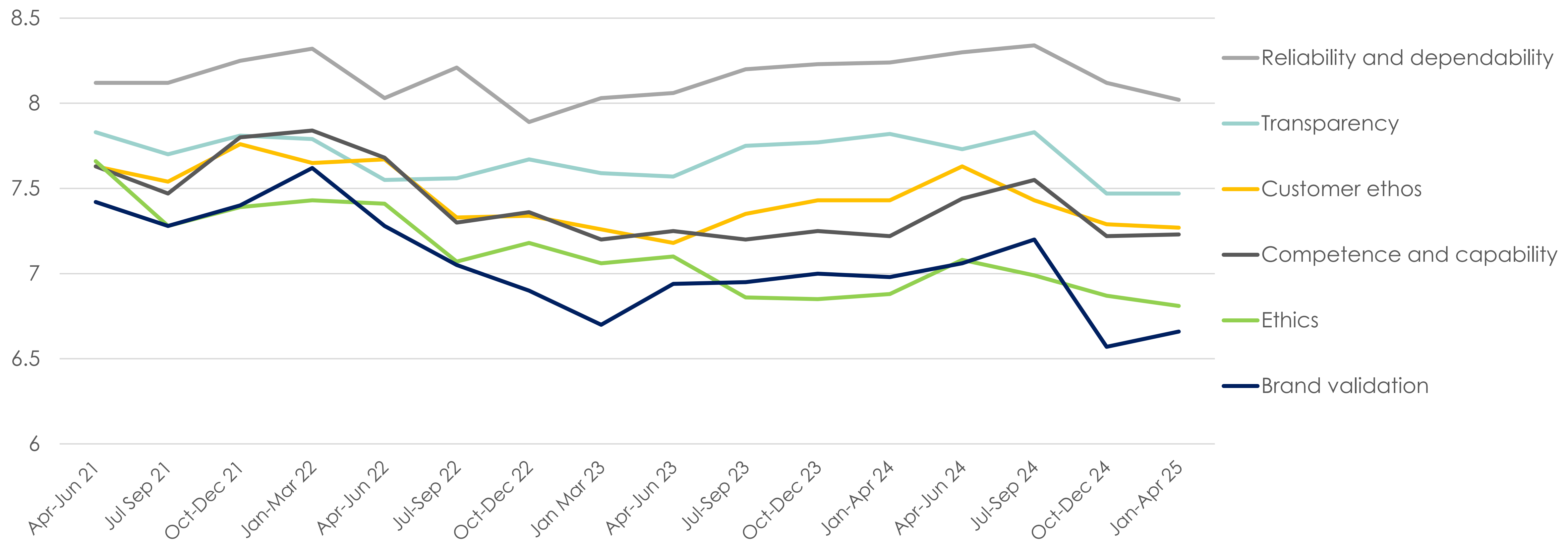


Trust Index components over time

Most metrics took a significant hit during autumn 2024, bringing '**Brand validation**' and '**Transparency**' to their lowest scores yet. However, '**Ethos**' remains stable over the last three Quarters.

Trust

Trust Index – Components



MEAN SCORE for each Trust component.
Base: 250 per Quarter between Apr 21-Jan 24; Apr-Jun 24 (356) Jul-Sep 24 (385) Oct-Dec 24 (691) Jan-Mar 25 (694).

Trust signature by key segments

Most segments appear to score consistently with the average. However, 'Carefree Consumers' are significantly lower than average on their perceptions of 'Brand validation' and 'Transparency'. There is also a need to build awareness for 'Pro-Planet Advocates' for multiple signatures – a company-critical, but environmentally-favourable group.

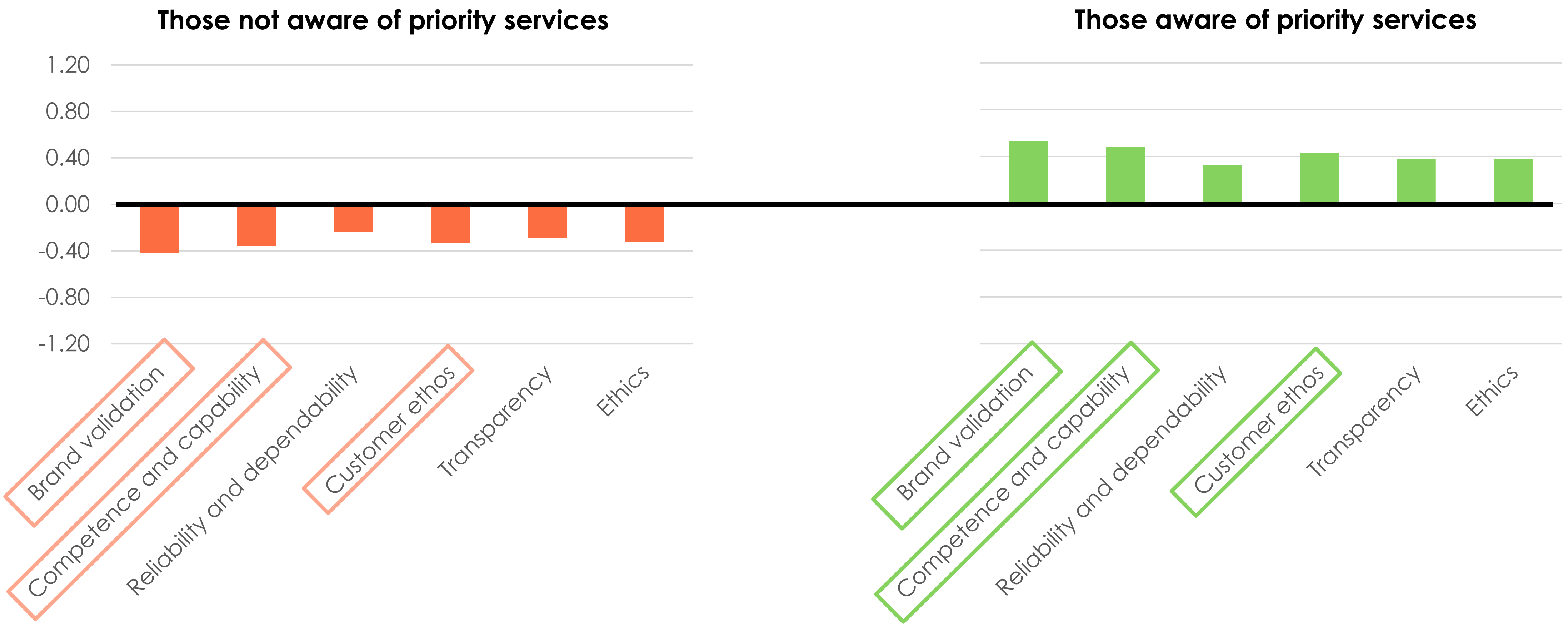
	Total (2126)	Responsible Environmentalists (359)	Lifestyle Empowered (284)	Convenience Cost-Savers (192)	Frugal Traditionalists (163)	Pro-Planet Advocates (221)	Carefree Consumers (166)
Brand validation	**6.79**	6.56	6.70	6.66	6.99	6.46	6.38
Competence and capability	**7.32**	7.35	7.34	7.09	7.36	6.90	7.23
Reliability and dependability	**8.16**	8.27	8.06	8.00	8.17	7.90	7.89
Customer ethos	**7.37**	7.48	7.31	7.13	7.49	7.04	7.08
Transparency	**7.58**	7.64	7.56	7.41	7.65	7.29	7.08
Ethics	**6.91**	6.81	6.92	6.88	7.10	6.61	6.75

0.4+ VS TOTAL | +-0.3 VS TOTAL | -0.3 VS TOTAL | -0.4+ VS TOTAL

Trust signature for those unaware and aware of PSR

The gap between average ratings of those aware of priority services versus those not aware widens further – demonstrating the value of the PSR in building trust, especially the belief that Wessex Water is capable, well-regarded and cares about customers.

Columns indicate difference to overall average score for each trust component

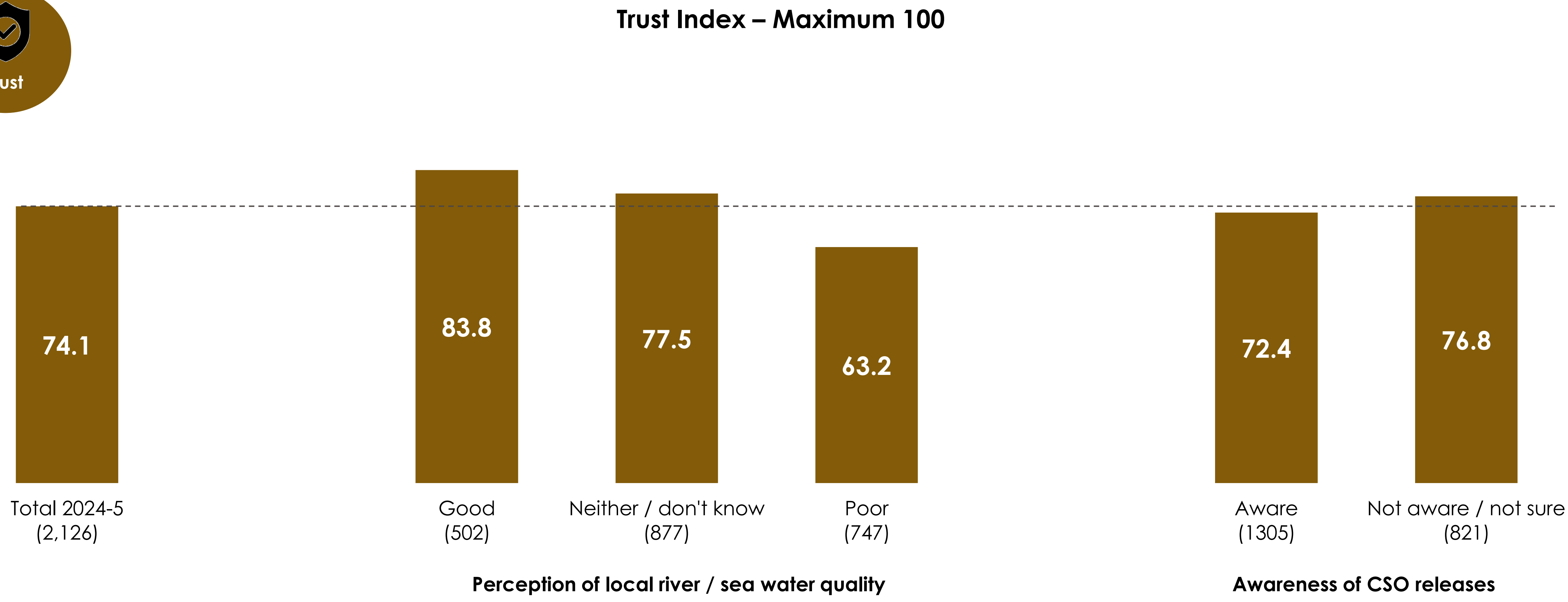


Base: Those not aware of priority services 2024/5 (1186); Those aware of priority services 2024/5 (940)

Trust Index – 2024/5: Differences by attitudes to water quality & CSO awareness

Compared to last year, 2024/5 data more starkly reveals a link between company trust and perceptions of local water quality. Awareness of CSO releases also seems to be linked with a slightly lower trust score – more apparent this year than last.

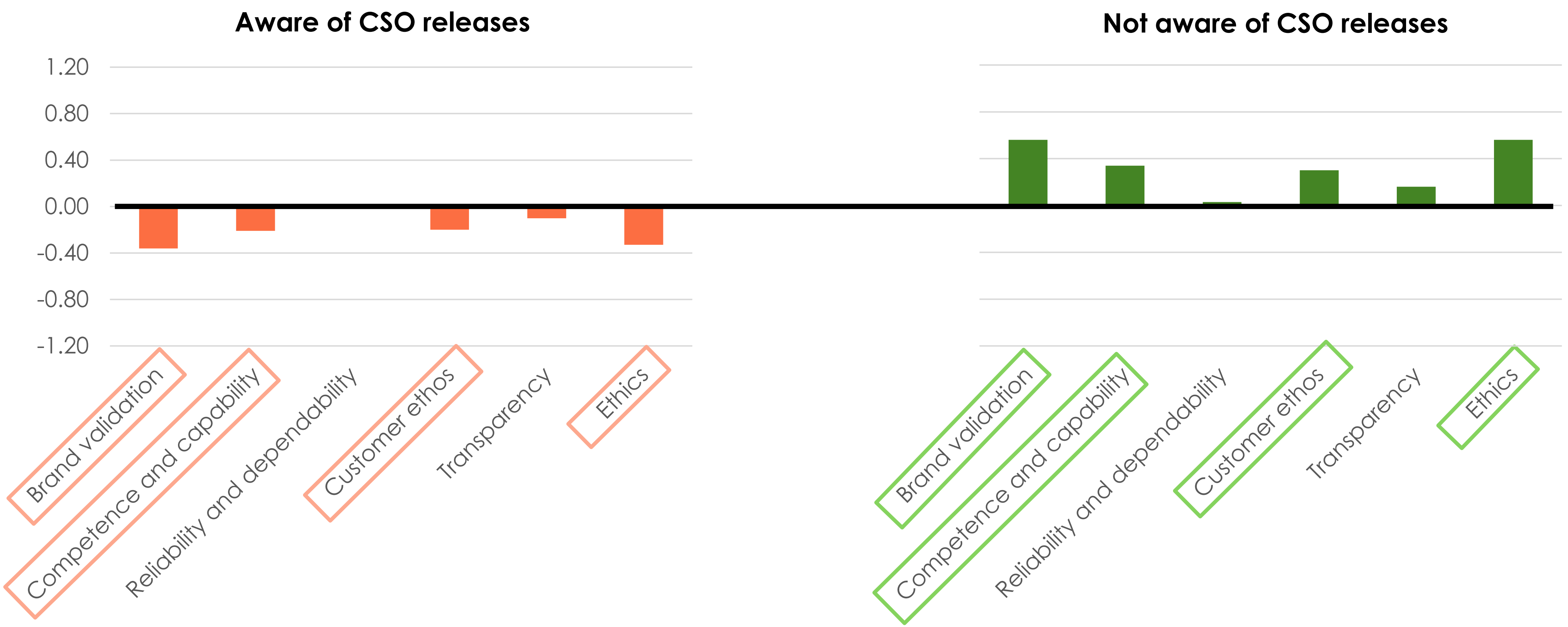
Trust



Trust signature of those who are aware of CSO releases

Those aware of CSO releases on average rate ‘**brand validation**’, ‘**competence and capability’**, **‘customer ethos’** and ‘**ethics**’ much lower than those who are unaware. This suggests that Wessex Water taking ownership of the CSOs narrative could be essential for helping to moderate wider company views and trust.

Columns indicate difference to overall average score for each trust component

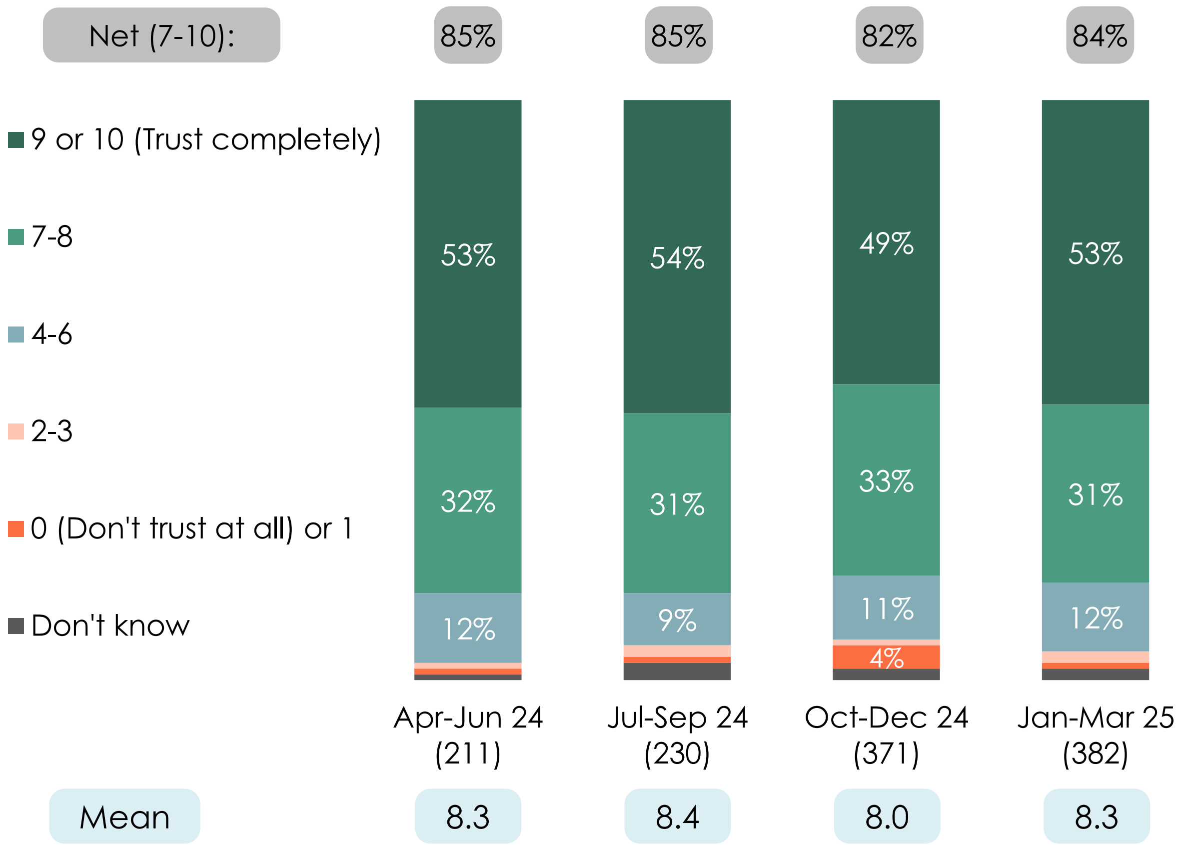


Base: Those who aware of CSO releases 2024/5 (1305); Those unaware of CSO releases (821)

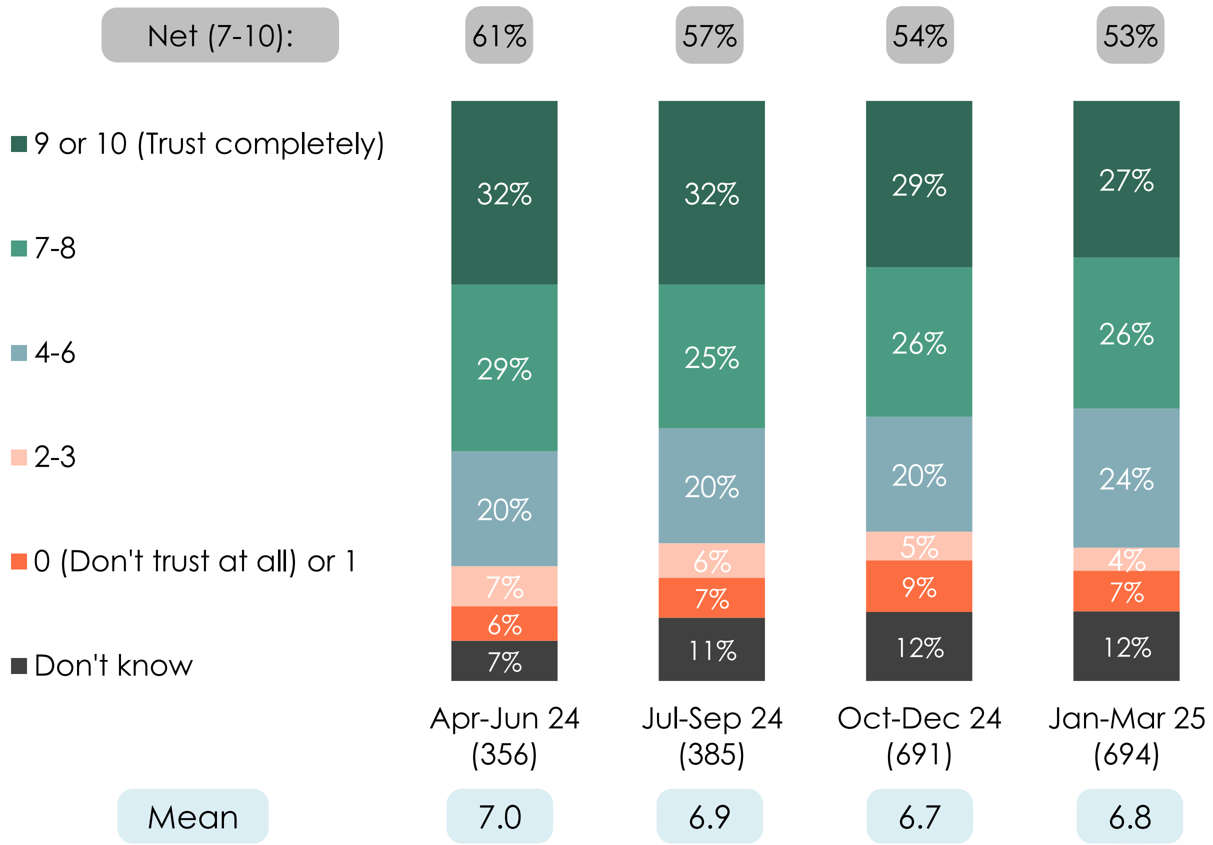
Trust in water supply and sewage/wastewater disposal

Trust in Wessex Water's ability to deliver good quality tap water is in line with 2023/4 – with still a firm majority showing this. Trust levels in Wessex Water's ability to handle sewage, however, has steadily declined in the past year, with almost 1 in every 2 customers now feeling neutral or untrusting.

QT1. How much do you trust Wessex Water to provide a reliable supply of good quality tap water?
Base: All respondents in supply area



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



New measure for Q1 2023/4

Trust 2024/5 - summary

- Although the tracker showed a slow, steady recovery in trust last year and into Q1 this year, **levels drop to their lowest yet by Q4.**
- The yearly average has fallen by 0.4 since last year, **driven most by declines in the two metrics** that had recovered last year – suggesting these metrics remain unstable.

Brand validation	• Well regarded in the community
Transparency	• Open and transparent company • Providing clear and easy to understand information

- Across the segments, trust in Wessex Water varies. The Trust score among 'Pro-Planet Advocates' and 'Carefree Consumers' is well below average (with 'Convenience Cost-Savers' also low).
- To target these segments effectively, these areas offer the most room for improvement:
  - **Pro-Planet Advocates:** Score lowest on brand validation, followed by ethics. As this segment is environmentally-focused, winning over local community in this way and showing they care is likely to bring a rise in Trust Index here.
  - **Carefree Consumers:** Lowest rating is for brand validation. This less engaged group care about little other than cost savings, so to boost this among their circles may help.
  - **Convenience Cost-Savers:** Score lowest on brand validation. This segment are above average for online/social media sources, so messages to target this on these platforms may penetrate.

- **Ethics** (being a responsible and ethical company; caring about the environment) continues to decline, with a steady drop between Q1 to Q4 again this year. While tracker data confirms environmental concern is held by most, with rising bills and increased focus on affordability across the industry, some customers may now view bill changes as unethical, contributing to this decline. This may be particularly true for less environmentally driven segments like 'Carefree Consumers'.

Storm overflows

Photo by Kyle Cleveland on Unsplash

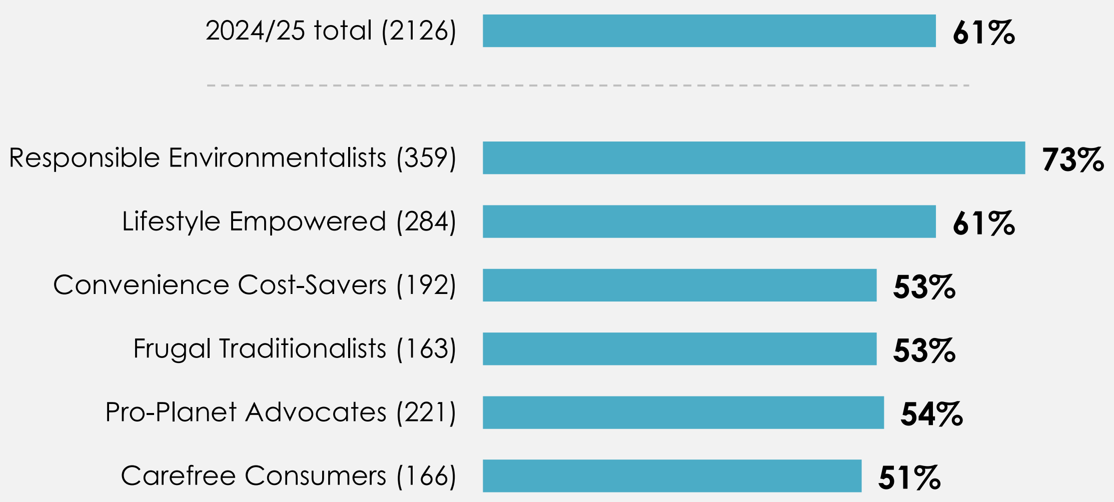
Awareness of releases from storm overflows

Following a dip in the first half of 2024, awareness of storm overflow releases peaks again during the summer of the draft determinations, sewage spill investigation, and general elections during 2024. By Q4, awareness returns closer to the lower levels at the start of the annum, with approximately 6 in 10 customers aware.

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

Base: All respondents

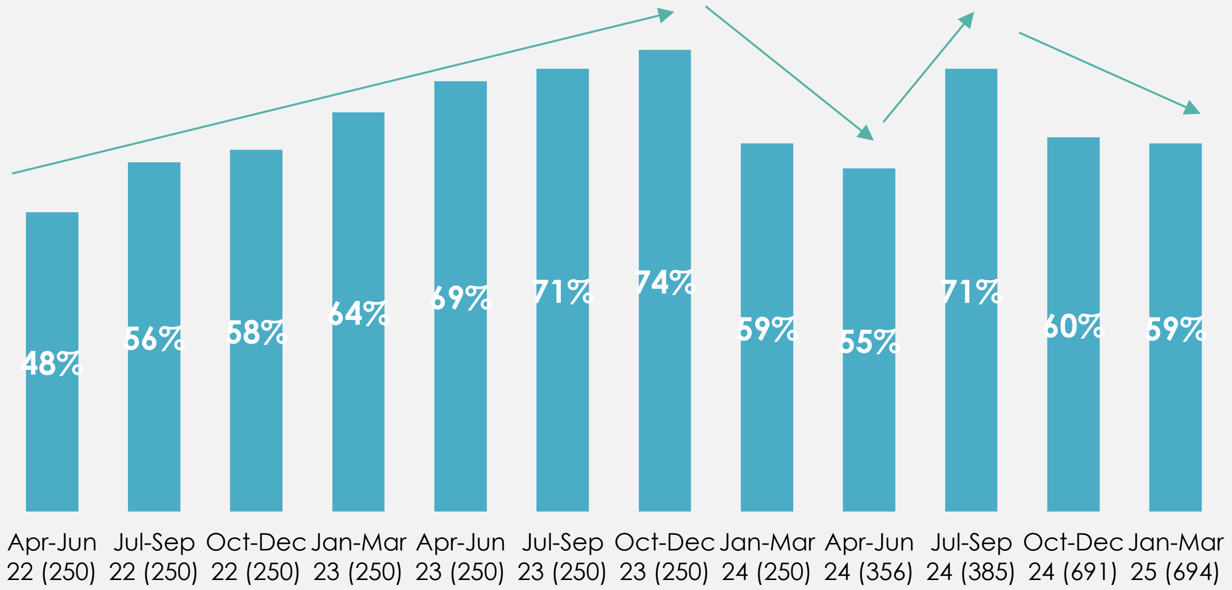
Audience breakdown



Higher awareness of CSO releases among other groups:

- Those who recall seeing/hearing about Wessex Water in the news (L6M)
- Wessex Water supply region, Older (55+); Male, ABC1; Metered;

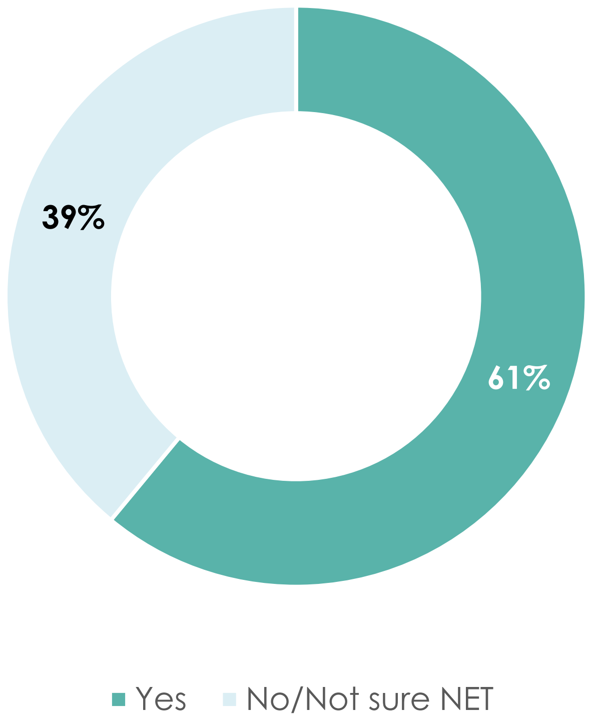
Quarter-by-Quarter view



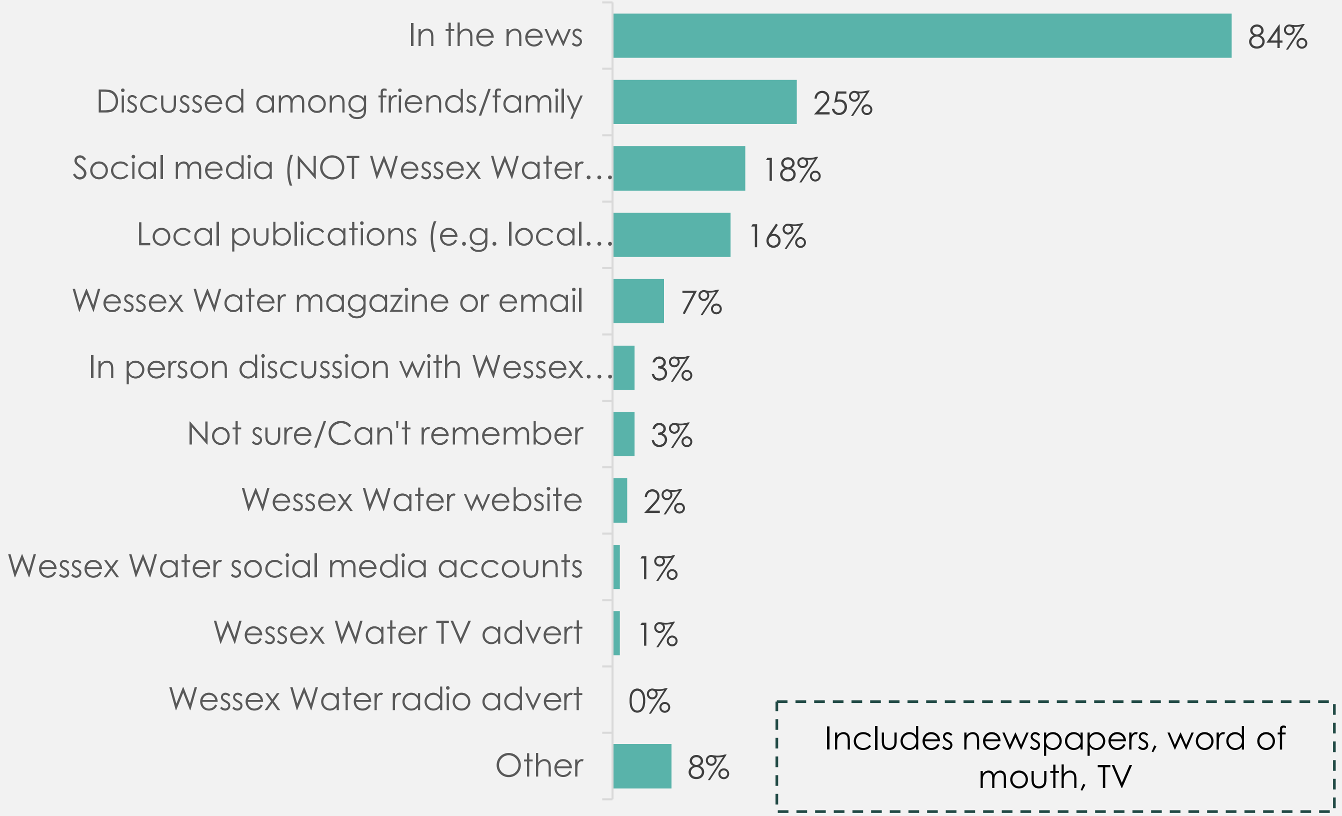
Source of awareness of storm overflow releases

Similar to 2023/4, the vast majority of those aware of storm overflow releases have heard about it via the news. The proportion of customers citing discussion among friends or family rises from less than 1 in 10 to 1 in 4, while the proportion citing social media (not Wessex Water's) and local publications triple and double, respectively.

QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before?
Base: All respondents (2126)



QF1e And where did you hear about this topic?
Base: All who have heard about storm overflows releases (1305)

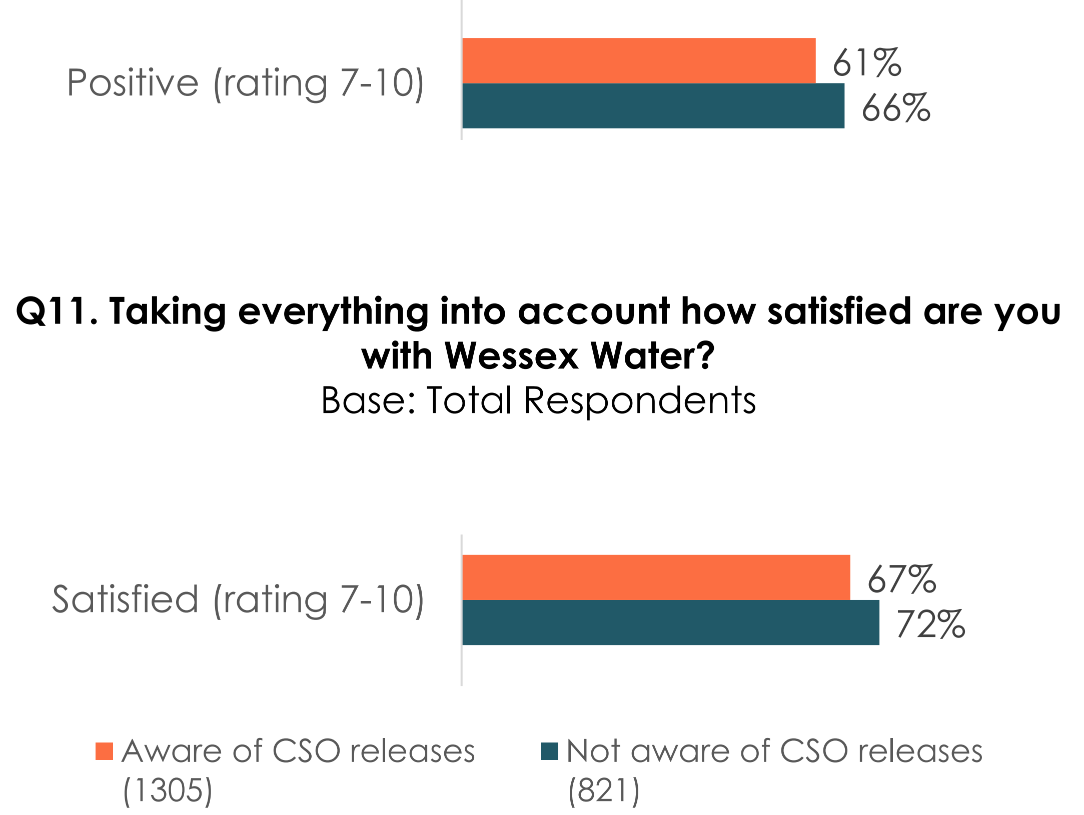


Impact of awareness of CSOs' releases on satisfaction and sentiment

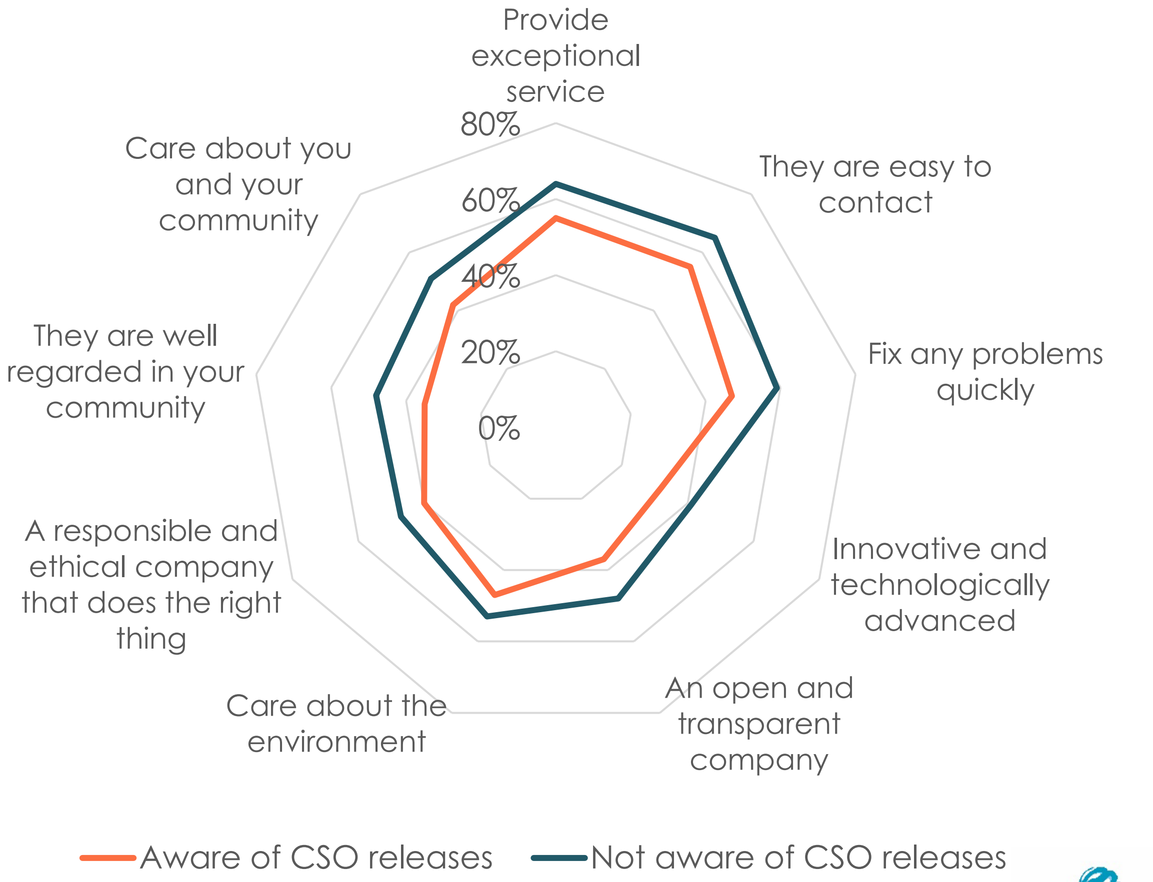
Awareness of storm overflow releases has a significant negative impact on both sentiment and satisfaction. Those aware of CSO releases are also still less likely to positively endorse Wessex Water on all perception metrics, especially 'well regarded in community', and 'open and transparent'.

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



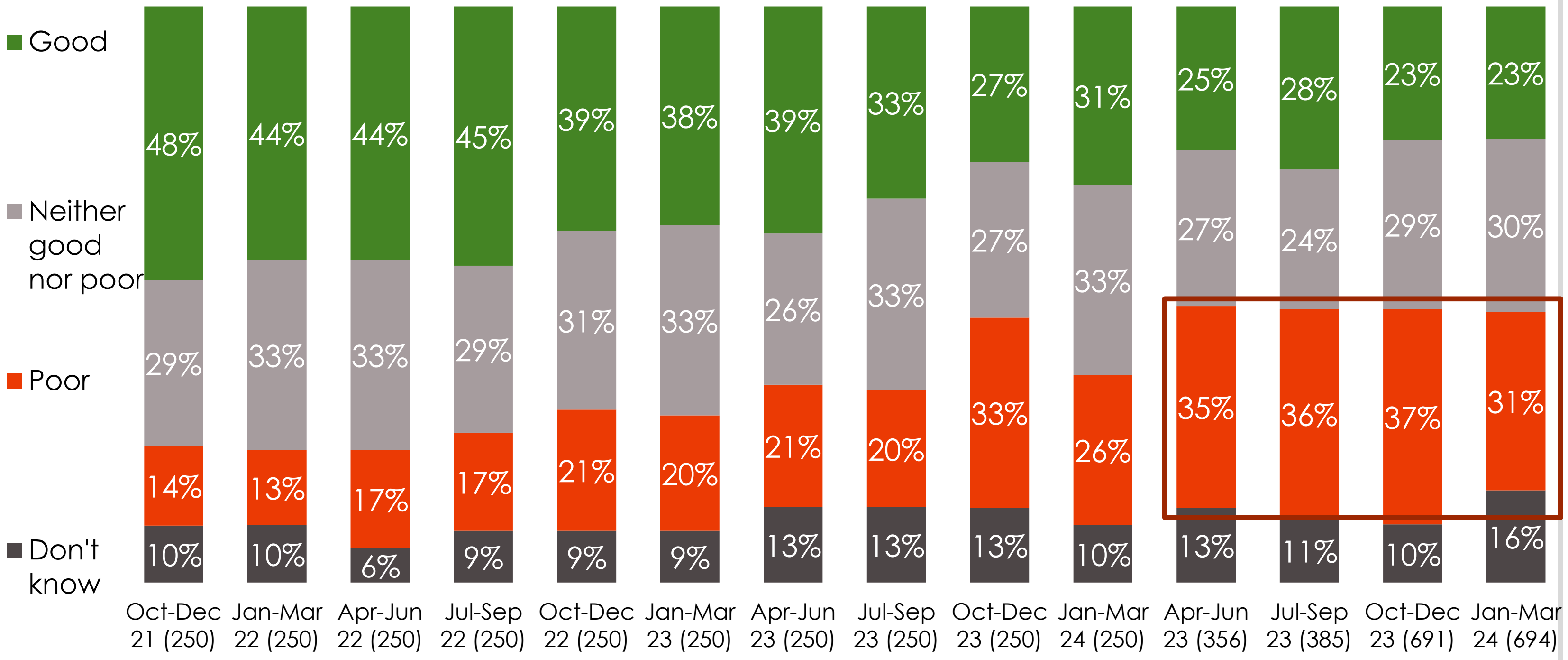
Q8. Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements?
Base: All Respondents aware of CSO releases (1305) / not aware (821)



Perceptions of water quality in Wessex Water region

Positive perceptions of the quality of water in rivers and seas continue to decline since summer 2022, with only around 1 in 4 now rating the water quality as 'good'. Discontent about the quality of water in their area has now grown to more than a third – with verbatim showing how sewage overflows impact customer perceptions of this.

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*



"There is too much sewage being flooded into rivers/lakes. Absolutely ruined habitats and nature. A river near me you see toilet paper and rubbish, being emptied into what was a beautiful river."

"It goes into drain, to a sewage treatment facility, which is then released into the sea or Radipole lake."

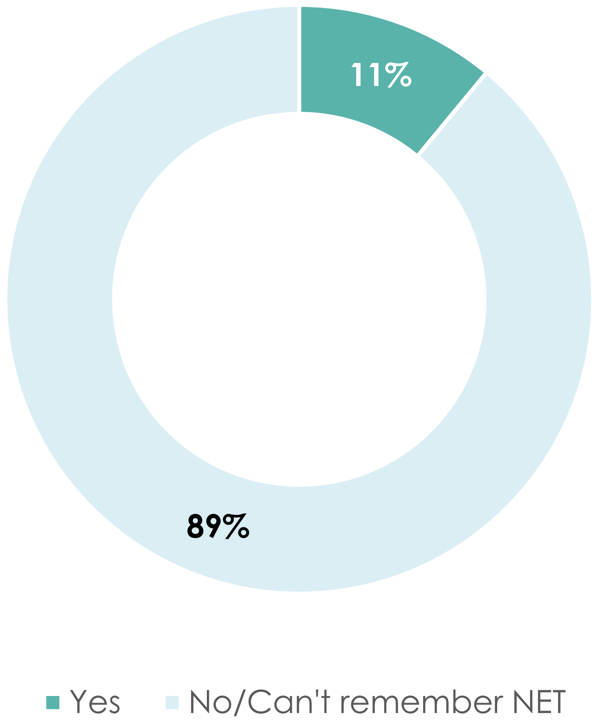
"Please stop sewerage entering our rivers, lakes and beaches!"

"Please help make a difference to get our rivers clean again."

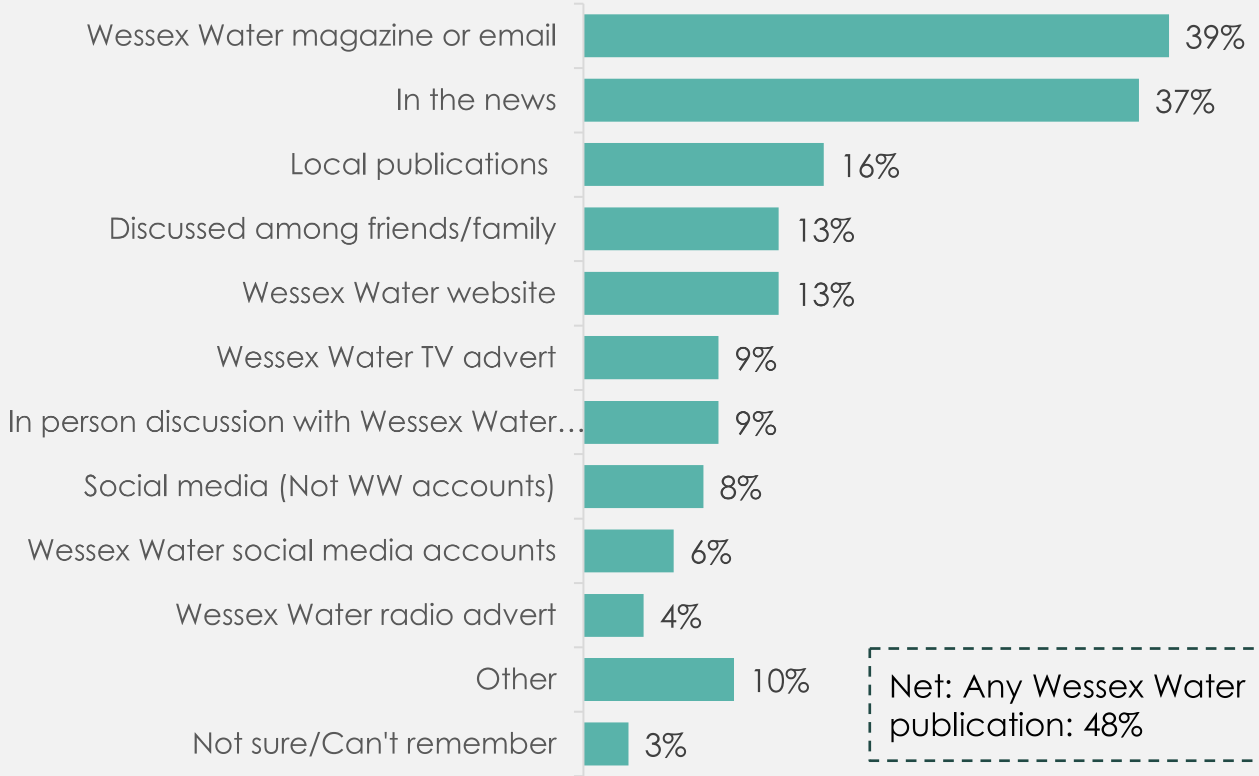
Awareness of Wessex Water activity to reduce storm overflows

Similar to 2023/4, only around 1 in 10 are aware of Wessex Water's efforts to reduce storm overflow activities. Most of those aware recall learning about this in Wessex Water magazine/emails, or in the news.

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 (2126)*



QF1h And where did you hear about this topic? (Number of mentions)
Base: All aware of Wessex Water activity to reduce CSOs (244)



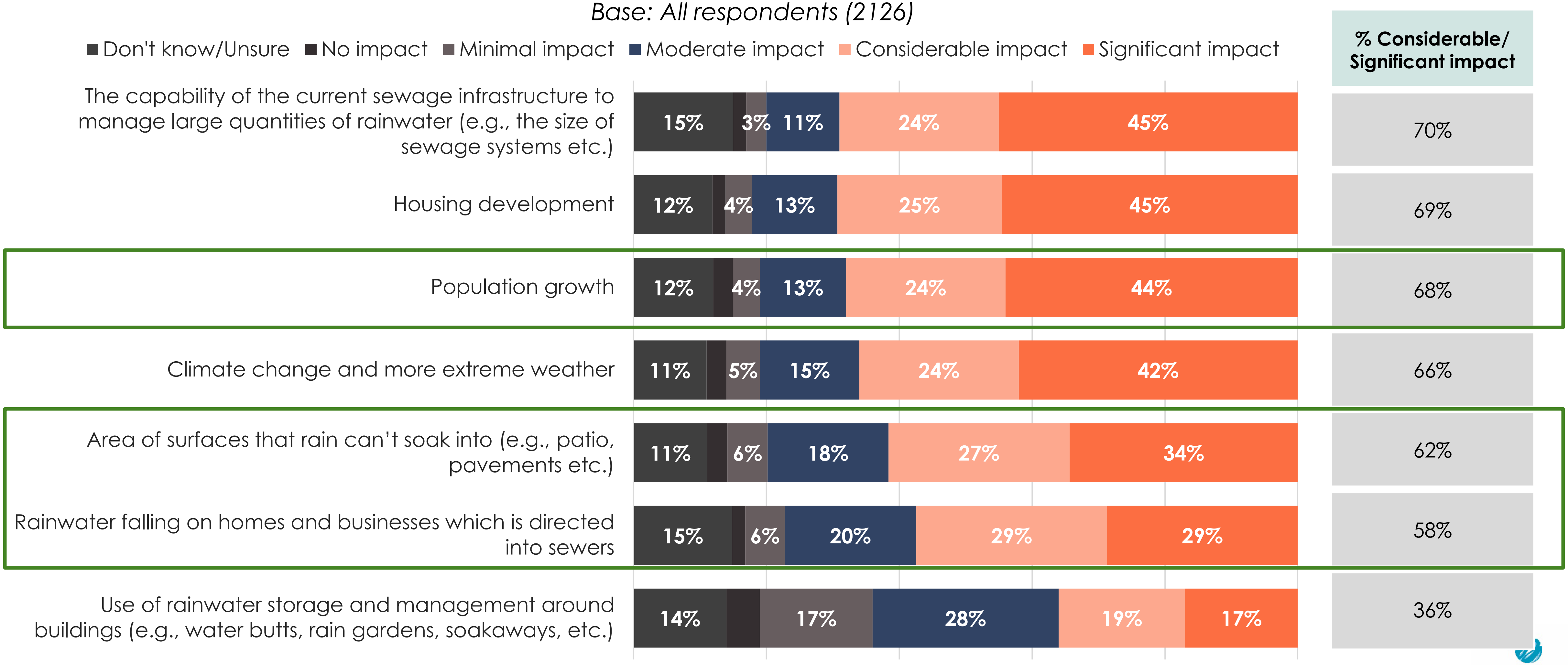
Net: Any Wessex Water publication: 48%

Impact of factors on storm overflow operations

Awareness of several factors' impact rises, with population growth, surface types and properties all increasing significantly. The proportion who are unsure of what impacts on frequency of CSO operations has also decreased for multiple factors since last year, despite overall awareness of Wessex Water's actions being the same.

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

Base: All respondents (2126)



Storm overflows - summary

It is unsurprising that sewage overflow remains a key concern for Wessex Water customers, given the **sustained negative media coverage** on this issue.

- **Awareness of storm overflow releases remained largely stable** across 2024/25, starting and ending the year at similar levels. A notable spike was observed in Q3, peaking at 71%.
- Over 8 in 10 of customers continue to hear about CSO releases **predominantly through the news**, which remains by far the most common source of information.
- However, **awareness of what Wessex Water is specifically doing to address CSOs remains low**, with only 1 in 10 customers aware - unchanged from last year. This stark contrast highlights a significant opportunity to strengthen communications around Wessex Water's efforts in this area. Customers are keen to hear more about the actions being taken, yet while 4 in 10 of those aware of Wessex Water's initiatives cite Wessex Water's own publications as their source, these communications are only reaching a small segment of the customer base.

Unlike last year, awareness of CSO releases now appears to have a **marked negative impact on sentiment and overall satisfaction** with Wessex Water. Across all key performance metrics, including reputation within the community and fixing problems quickly, scores fall significantly among those aware of CSO releases, potentially underscoring the damage to brand perception.

Despite a slight decline in overall awareness of storm overflows this year, customer **perceptions of water quality have worsened further**. The proportion of customers rating the quality of their local seas and rivers as 'good' has continued to drop, reaching its lowest point to date in Q4. Feedback suggests customers feel they are witnessing the direct impact of CSOs, which likely explains the strong emotional response this issue provokes.

Environmental attitudes

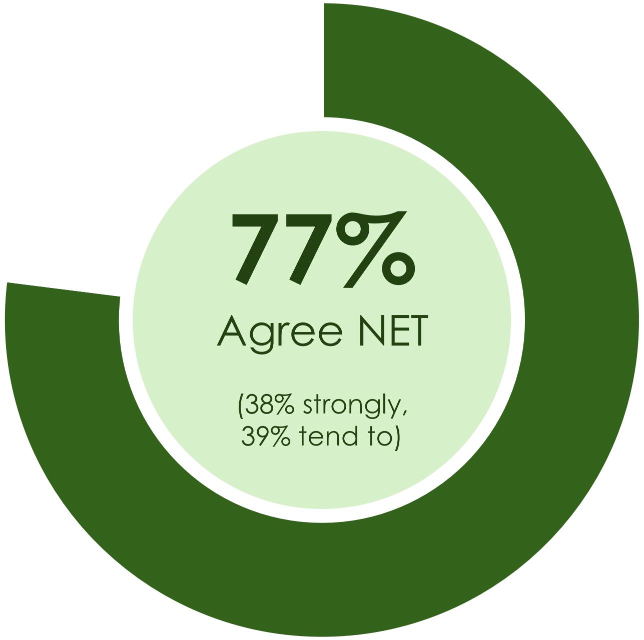
Photo by Pixabay on Unsplash

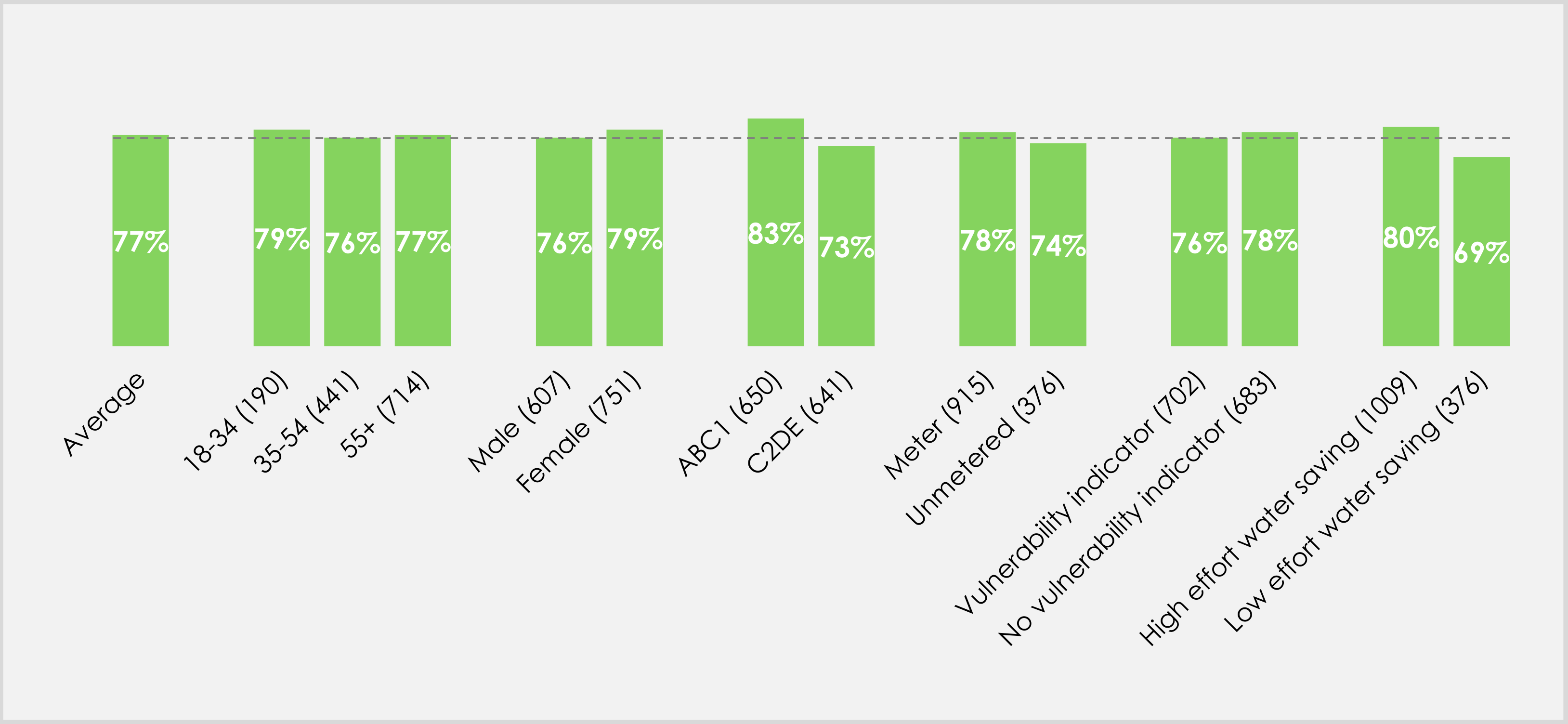
Environmental concern

Environmental concern is high, with nearly 8 in 10 agreeing they are "very concerned" about environmental issues. This is consistent across core demographics but remains a key differentiator between segments. Low water savers show noticeably less concern than higher-effort savers (though still a majority), suggesting environmental worries may be influencing stronger saving behaviours, alongside cost considerations.

Q3. Thinking about your own social and environmental views, how much do you agree or disagree with the following statement: *"I am very concerned with environmental issues"*?
(Base: All 2024/25 – Q3/Q4)

2024/25

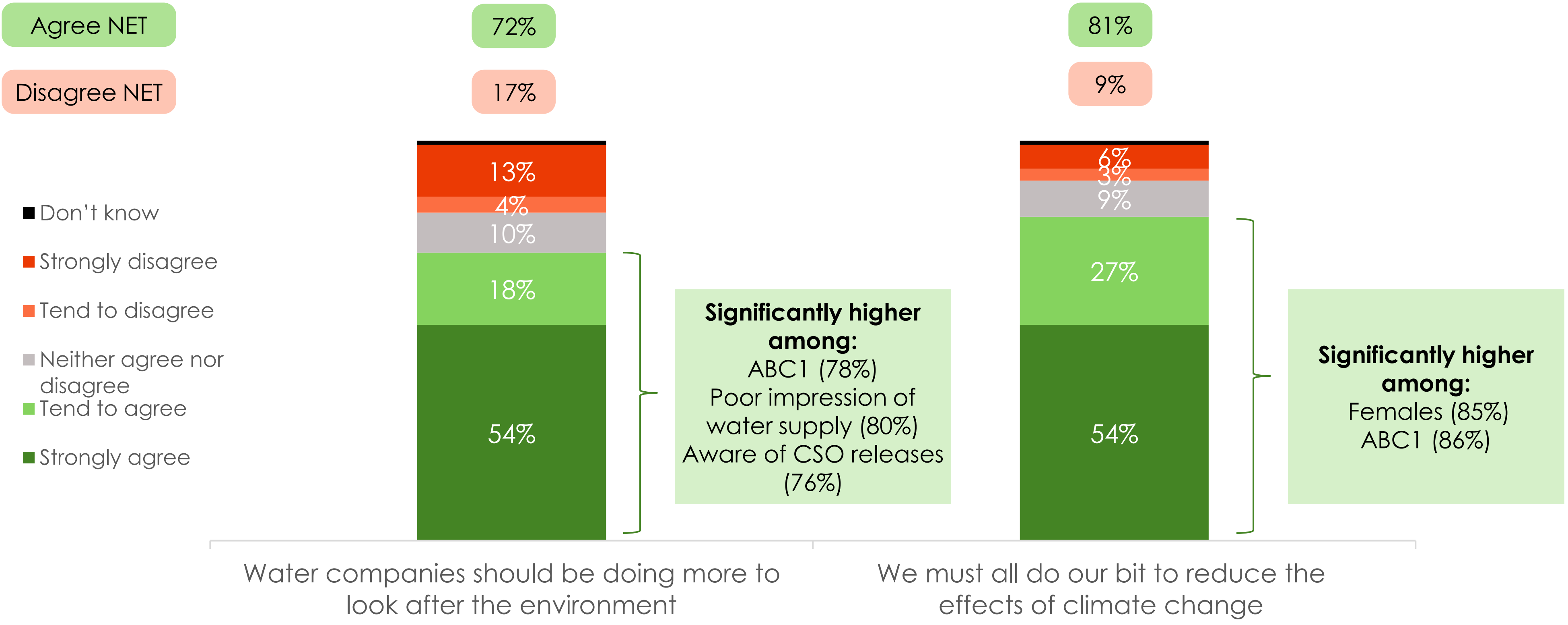




Environmental responsibility

Most customers believe water companies should be doing more for the environment, with even stronger agreement that individuals also have a role to play in minimising the impact of climate change. ABC1 social grade customers are more likely to recognise the value of both personal and corporate action in supporting the environment.

Q3/5b. How much do you agree or disagree with the following statements?
Base: All respondents (Q3-4, 1385)

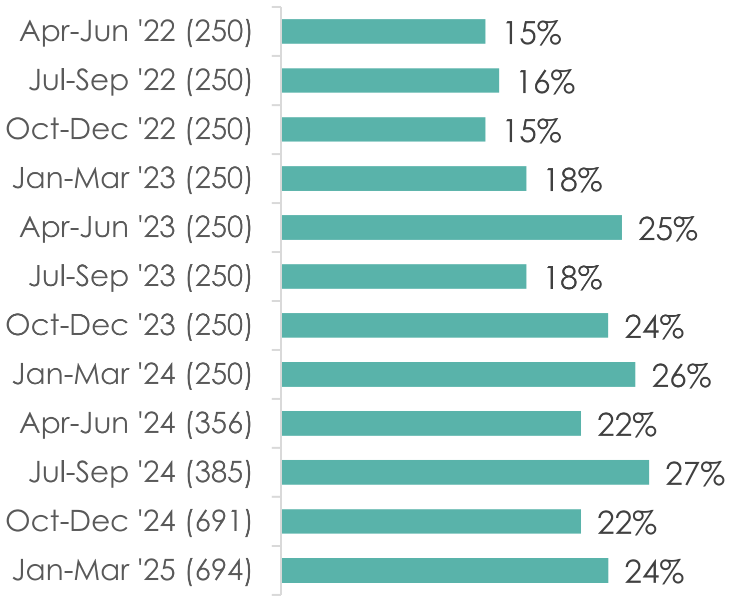


Source: New question for Q3 2024/5

Supporting the environment – spontaneous mentions

Demand for Wessex Water to improve its environmental actions grows steadily, peaking in Q2 2024, when it was top of mind for over 1 in 4 customers. This far exceeded spontaneous mentions of price and bills, raised by just 1 in 20 (though this may also be distorted by Bristol and Bournemouth being sewage-only supply areas).

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
% 'Environmental'
Base: All respondents



"I think they need to focus on the environment and they need to prevent sewage overflows."

"My concern is the environment. Wessex Water needs to invest more into infrastructure in order to prevent sewage overflows."

"More environmental work - habitat enhancement etc. and explain this to customers more."

"More promotion of their conscious efforts in changing the way that water company's are viewed when it comes to environmental issues, such as pollution and emissions."

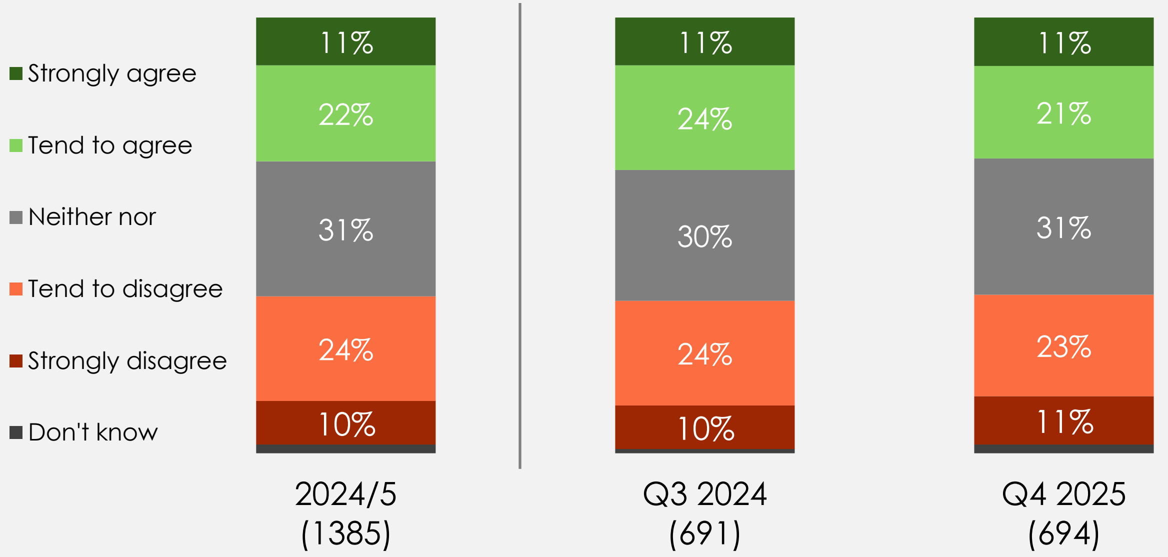
Breakdown of 'Environmental' mentions	**24/5**	**23/4**	**22/3**
Should be NO / LESS sewage in the rivers / sea	17%	17%	10%
Be more environmentally/ecofriendly (general)	4%	3%	N/A
Improvement to sewage infrastructure/handling	3%	5%	4%
Flood prevention	2%	3%	1%
Look after rivers and wildlife	2%	1%	2%

Balancing costs versus environmentally friendly choices

Overall, customers are evenly split in prioritising lower costs, environmental concerns, or neither in their personal lives. In a context of sustained high living costs and declining financial indicators for 2024/25, it will be interesting to observe how customers prioritise environmental concerns with Wessex Water in future waves of the tracker.

Q3. Thinking about your own social and environmental views, how much do you agree or disagree with the following statement: "Keeping my costs down is more important than being environmentally friendly"?
Base: All respondents

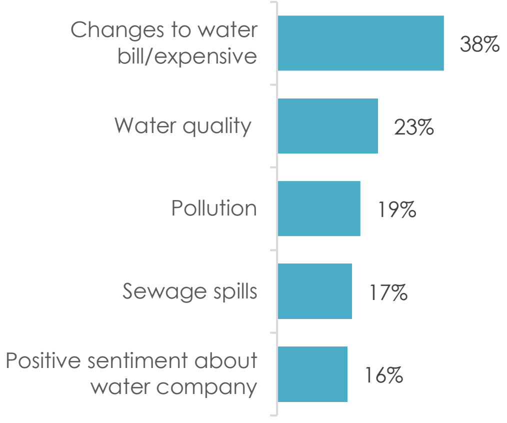
	2024/5	Q3 2024	Q4 2025
Agree NET	34%	35%	32%
Disagree NET	34%	34%	34%



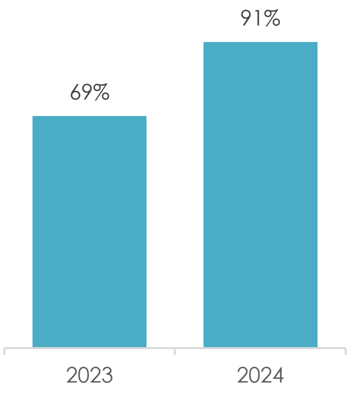
Interestingly, **non-billpayers** are more likely to agree and prioritise low costs (54% vs 31%). Those **C2DE** are also significantly more likely to agree than their ABC1 counterparts (39% vs 30%).

CCW Consumer Priorities 2025 Research

Top 5 unprompted topics when thinking about household water supplier



Prompted NET importance of 'Financial stability' for their water company



Recent research shows that rising household bills and the financial performance of water companies are growing concerns for consumers. Given that affordability and value for money have declined significantly for Wessex Water in 2024/25, this challenging context may drive a reduced customer appetite for their water companies to focus on environmental sustainability.

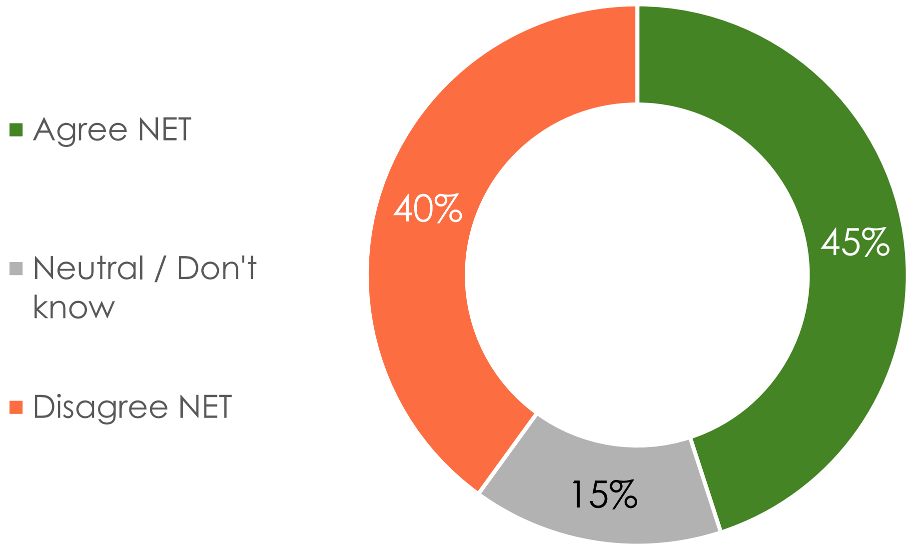
Source: Understanding consumer priorities 2025 - CCW

Water saving behaviours and attitudes

Photo by Nathan Dumlao on Unsplash

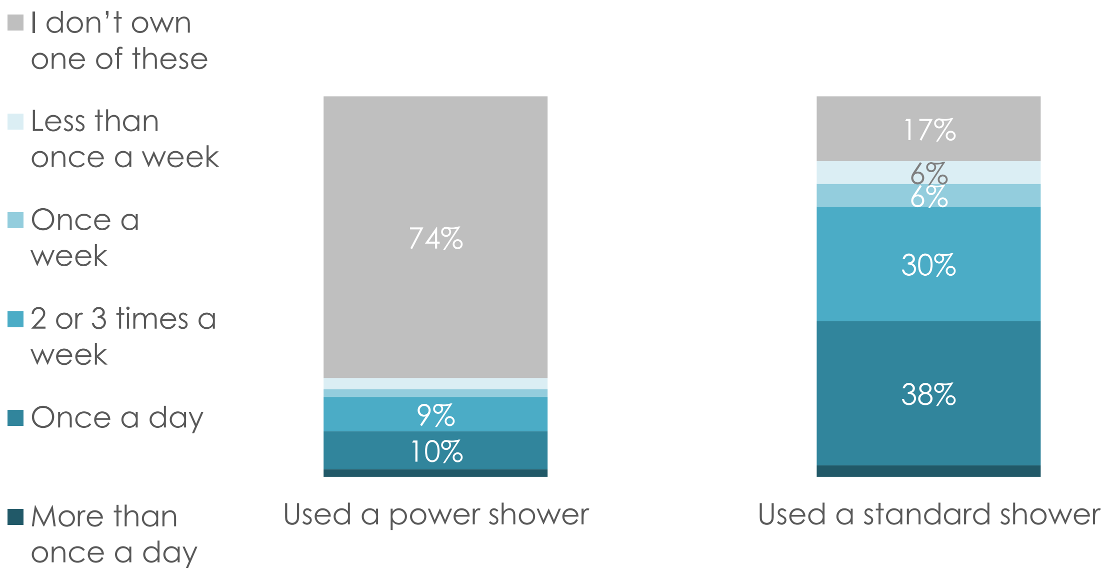
Customers are evenly divided on whether daily bathing is essential for hygiene, with younger customers much more likely to agree. Unsurprisingly, showering habits reflect this split in attitudes, with those under 55 significantly more likely to shower daily.

Q7. Now thinking about washing/bathing habits, how much do you agree or disagree with the following statements: *"It's essential to have one shower or bath a day to be hygienic"* ?
Base: All respondents (Q3-Q4)



Those **18-34** are **significantly more likely** to agree than older age groups

Q10b. In the last week or so, how often have you used each of the following at home?
Base: All respondents (Q3-Q4)



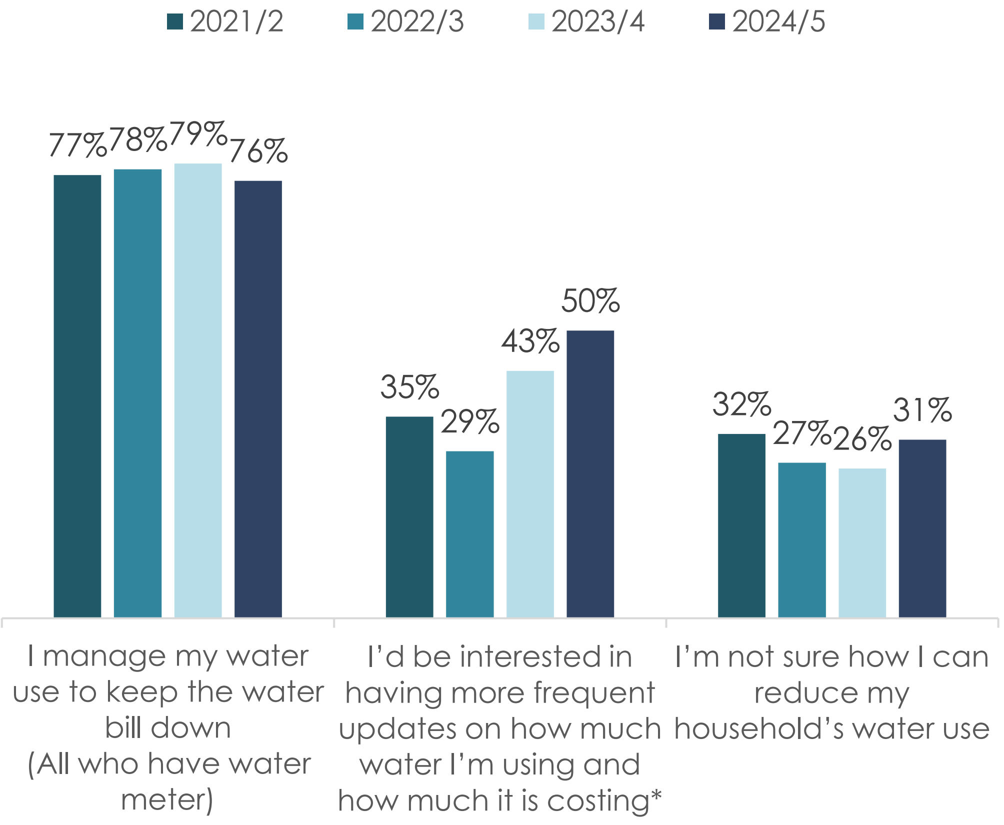
At least daily NET	**12%**	**41%**

Attitudes to water use and metering

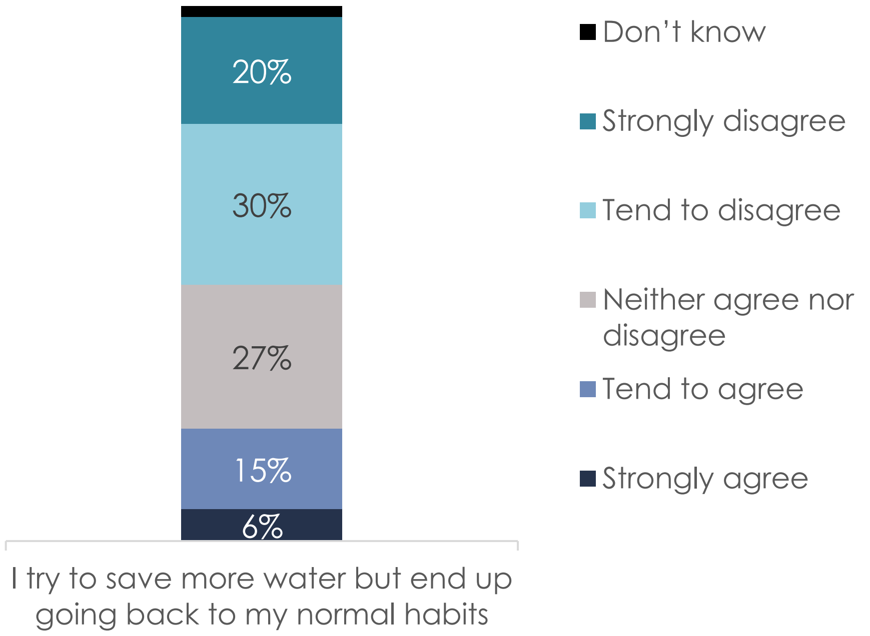
Water-saving efforts drop slightly this year, lowest in Q4, and there is a marked increase in people unsure *how* to reduce their usage - highlighting a potential gap and opportunity for education.

1 in 2 want more information on their consumption and costs, aligning well with the upcoming smart meter rollout. Interest is highest among 'Lifestyle Empowered' (57%), who are also most likely to say they try to save water but revert to old habits (28%). This suggests smart meters could be especially effective in supporting this motivated group to achieve lasting change.

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



Q7. How much do you agree or disagree with the following statement: *"I try to save more water but end up going back to my normal habits".*
Base: All respondents (Q3-Q4 24/25)



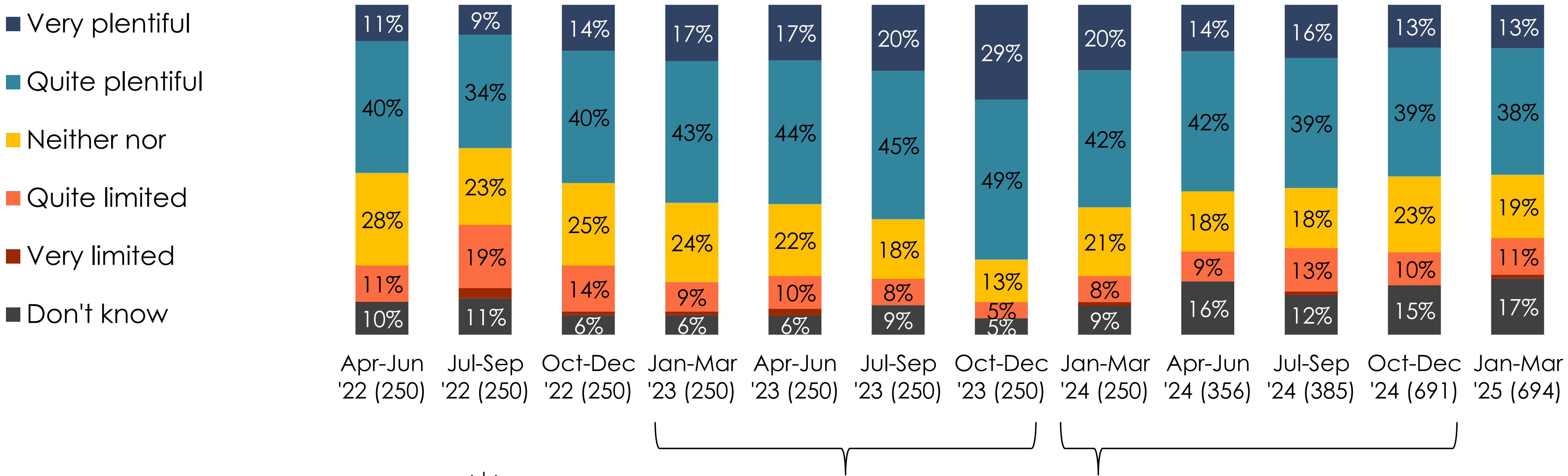
**Change to code wording in Q1 2023/24 – previously was "I'd be interested in having a smart water meter"*

Impressions of water resources in region

Perceptions of water being plentiful decline this year, returning to levels last seen in spring 2022/23, with only around 1 in 2 believing the supply is plentiful. Although rainfall was above average in 2024, the contrast with 2023's even wetter conditions may be influencing perceptions – with last year's scores potentially an exception to the rule. No seasonal shifts are observed, likely due to the relatively cool summer in 2024 compared to recent 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



Record breaking temperatures with heat health alerts issued in July

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

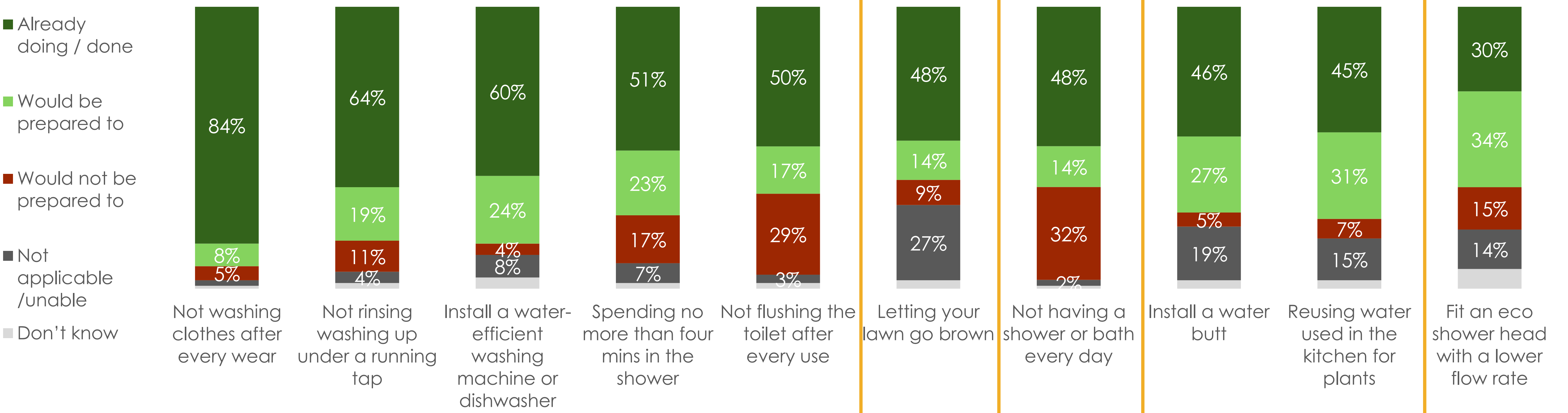
Above average rainfall but lower than 2023 (17th wettest year)

Cool and dull summer (coolest since 2015)

Water use behaviours

Although the top actions remain broadly similar this year, participation in several water-saving measures declines. A smaller proportion report taking steps to reduce water use in gardens and plants compared to last year (though fewer say these actions are relevant to them or that they are unable to). Resistance to adopting such measures remains low and stable, indicating continued openness among those not yet engaged.

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 2024/25*



	Not washing clothes after every wear	Not rinsing washing up under a running tap	Install a water-efficient washing machine or dishwasher	Spending no more than four mins in the shower	Not flushing the toilet after every use	Letting your lawn go brown	Not having a shower or bath every day	Install a water butt	Reusing water used in the kitchen for plants	Fit an eco shower head with a lower flow rate
Already doing/ done 2023/4	84%	68%	60%	54%	54%	56%	49%	51%	53%	34%
Not prepared to 2023/4	6%	10%	6%	17%	26%	7%	33%	5%	7%	12%

Communication

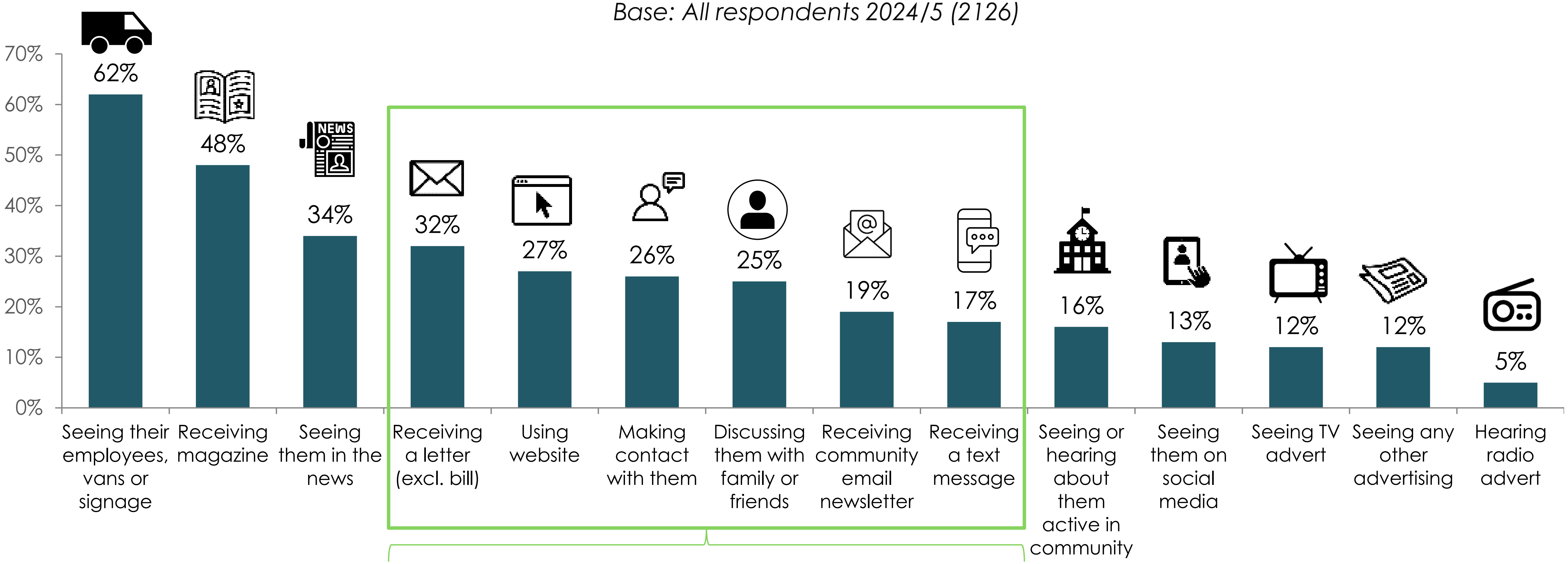
Photo by Rich Smith on Unsplash

Prompted recall of touchpoints (2024/5)

While the top 3 most common touchpoints remain stable, there is significant uplift in the proportion of customers seeing other Wessex Water communications. Most of these uplifts are matched across the customer segments, though 'Carefree Consumers' are notably higher for using the website and 'Frugal Traditionalists' for the email newsletter.

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

Base: All respondents 2024/5 (2126)



2023/4	60%	47%	33%	26%	15%	16%	18%	11%	8%	14%	11%	14%	10%	7%

Summary and moving forward

Photo by Jonathan Kemper on Unsplash

Executive summary | 1

The combined impact of rising living costs and forthcoming bill increases are likely to be affecting customer perceptions.

1

Financial hardship among customers continues to be reflected in the data this year. The proportion of customers that expect their financial situation to worsen increases, and the proportion that feels optimistic about their finances remains low. Satisfaction with value for money, affordability of charges, and peace of mind about paying bills are all significantly lower than last year - particularly in the Bournemouth supply area.

2

Overall satisfaction declines, likely reflecting the ongoing impact of rising utility bills and heightened public focus on financial pressures. Awareness of CSO releases (a shown differentiator of satisfaction) is lower this year, suggesting that financial concerns could be playing a role in the decline.

- Just under **half of customers believe they will be worse off** financially next year.
- Perceptions of **bill affordability** still show some seasonal volatility across the Quarters, but overall scores are **significantly lower** this year. **Awareness of financial support** also dips.
- **Anxiety around bills** continues to be a long-term concern. In Q3 & Q4, worry about bills was at its highest levels since summer 2022, potentially pointing towards an early impact of draft determinations and anticipated bill increases.
- **Value for money scores continue to decline**. While previously assumed to be linked mainly to broader cost of living pressures, this year's drop in performance metrics suggests wider issues in the water sector may now be impacting perceptions of Wessex Water.
- **Brand health metrics (including sentiment) remain relatively stable**. While broader industry frustrations could be influencing sentiment, there is still a lot of goodwill for Wessex Water despite lower satisfaction.

Environmental impact is a growing concern for customers, and awareness of CSO releases is having a direct negative impact on brand perception.

3

Most customers identify as environmentally concerned and expect water companies to do more to protect the local environment. The environment is a clear priority for improvement, with CSO releases specifically highlighted. Awareness of CSO releases is significantly linked to lower customer sentiment satisfaction, even as awareness about what impacts CSO releases is growing. Rebuilding trust in this area will be a key challenge.

4

While customers expect Wessex Water to take stronger environmental action, there is a crucial balance to strike between environmental improvements and cost. Opinions are split between segments on which is more important, and at a time when satisfaction with affordability and value for money is declining, customers will be looking for reassurance that environmental responsibility won't come at their expense.

- **Around 8 in 10 customers say they are very concerned about the environment**, with a similar proportion believing water companies should do more. 'Responsible Environmentalists' most unanimously agree on these.
- Perceptions that Wessex Water **'Cares about the environment' falls** for the third year in a row.
- **Awareness of CSO releases peaked in summer 2024** but has declined since. **Perceptions of water quality continue to fall**, however, and less than 1 in 4 now rate it as good.
- **Improving perceptions is not just about action but also education;** awareness of the company's efforts to reduce storm overflows remains low, pointing to a clear opportunity for more effective communication.
- **Positively, awareness is growing around how certain factors (e.g. population growth, property drainage and surface types) affect CSO use.** But this awareness does not moderate negative perceptions among those aware of CSO releases.
- Customers (and segments) are **divided on whether they prioritise cost or eco-friendly actions personally.** For example, 'Carefree Consumers' highly prioritise cost, and don't feel water companies should do more for the environment, so this should be considered when producing comms around this.

Environmental impact is a growing concern for customers, and awareness of CSO releases is having a direct negative impact on brand perception.

5

Perceived level of knowledge of Wessex Water correlates with positive sentiment and greater trust. Less than half of customers feel they know at least a 'fair amount' about the company, making this a key focus area.

The smart meter rollout offers a valuable opportunity to strengthen customer understanding of operations. Pro-Planet Advocates, in particular, are a prime target: they demonstrate strong environmental concern, suggesting likely engagement with conservation, but are currently critical of the company despite (or due to?) lower knowledge.

6

Each of the new customer segments has distinct needs and priorities. Communication and education strategies should focus on the core concerns of each segment, tapping into their key motivators.

- **Knowledge about Wessex Water boosts company sentiment. Exposure to various touchpoints** (e.g. magazine and social media) also increases perceived knowledge and sentiment.
- **Trust is positively correlated** with greater knowledge about Wessex Water.
- **Responsible Environmentalists** are the most satisfied – and have highest claimed knowledge about Wessex Water.
- **Awareness of support services** is stable, room for growth remains, especially as increased familiarity with these services is linked to higher customer satisfaction.
- Many show an **appetite for more updates about water usage and costs,** with the highest level among the 'Lifestyle Empowered segment'.
- Some **1 in 3 are unsure how to reduce their usage further** – especially Carefree Consumers. In contrast, half of Responsible Environmentalists indicate much higher levels of confidence in their broader water-saving behaviours – aligning with, and complementary to, their stronger company knowledge.

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Appendix 1 – Subgroup analysis

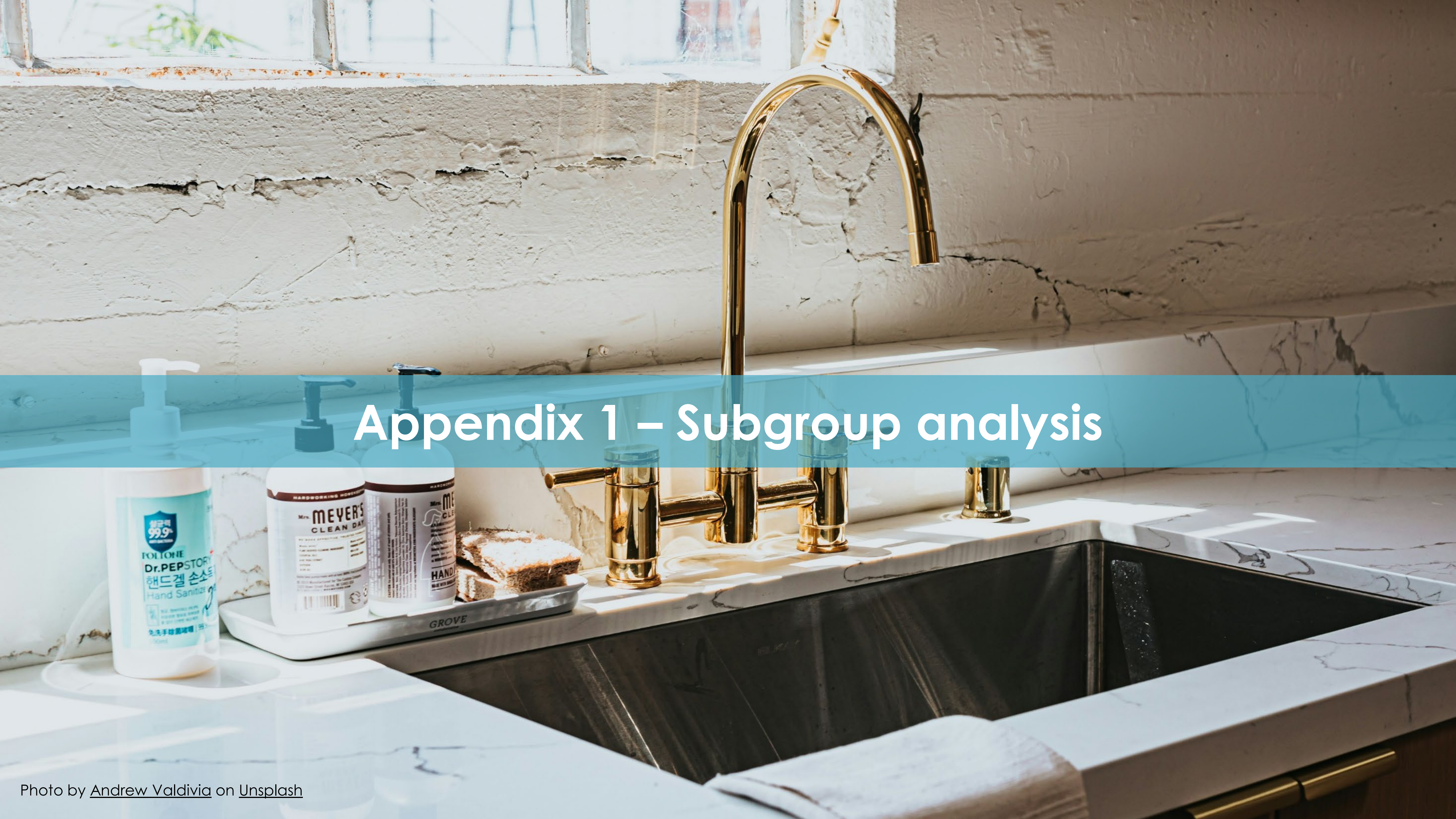


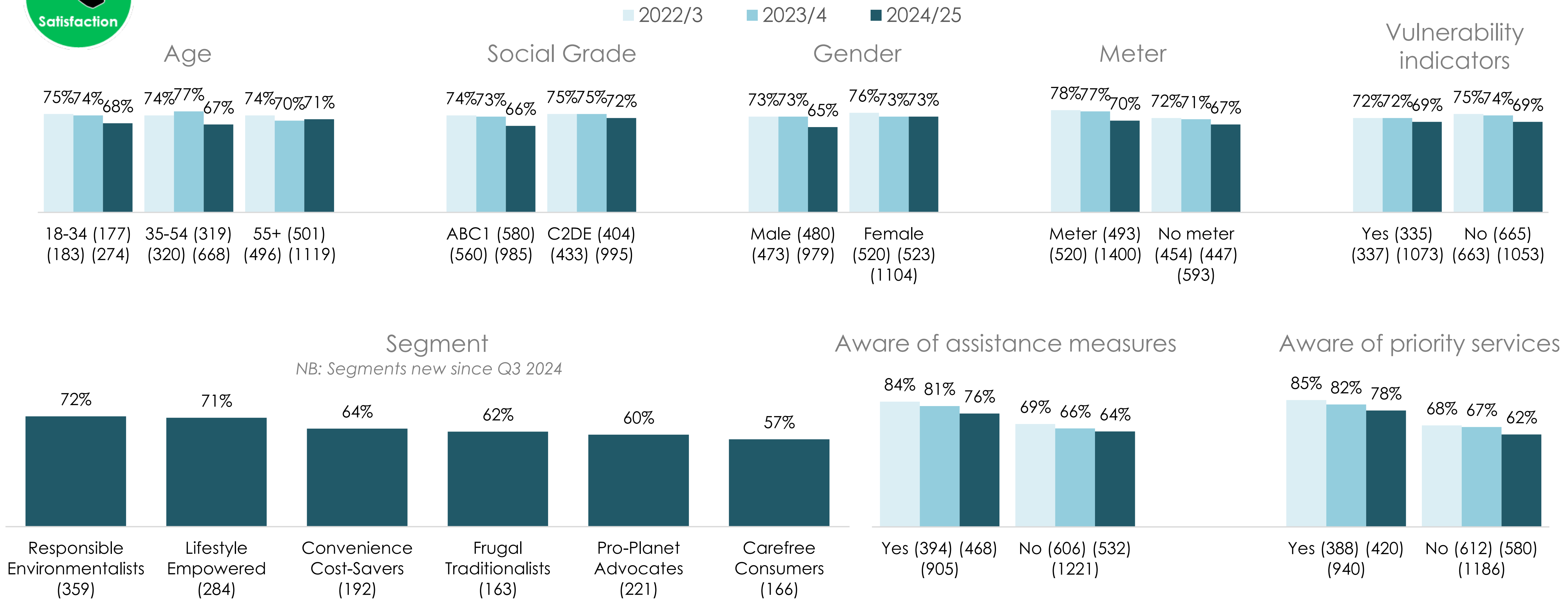
Photo by Andrew Valdivia on Unsplash

Overall satisfaction by key groups 2022/3; 2023/4; 2024/5

Satisfaction with Wessex Water has dropped significantly since 2023/24. This dwindling satisfaction has been observed across the board – with those 55+ as the only exception where this has not fallen. For the new customers segments, 'Carefree Consumers' have the lowest satisfaction of all.

Satisfaction

Q11. Taking everything into account how satisfied are you with Wessex Water?
% Satisfied (7-10) *Base: All 2022/3, 2023/4 and 2024/5*



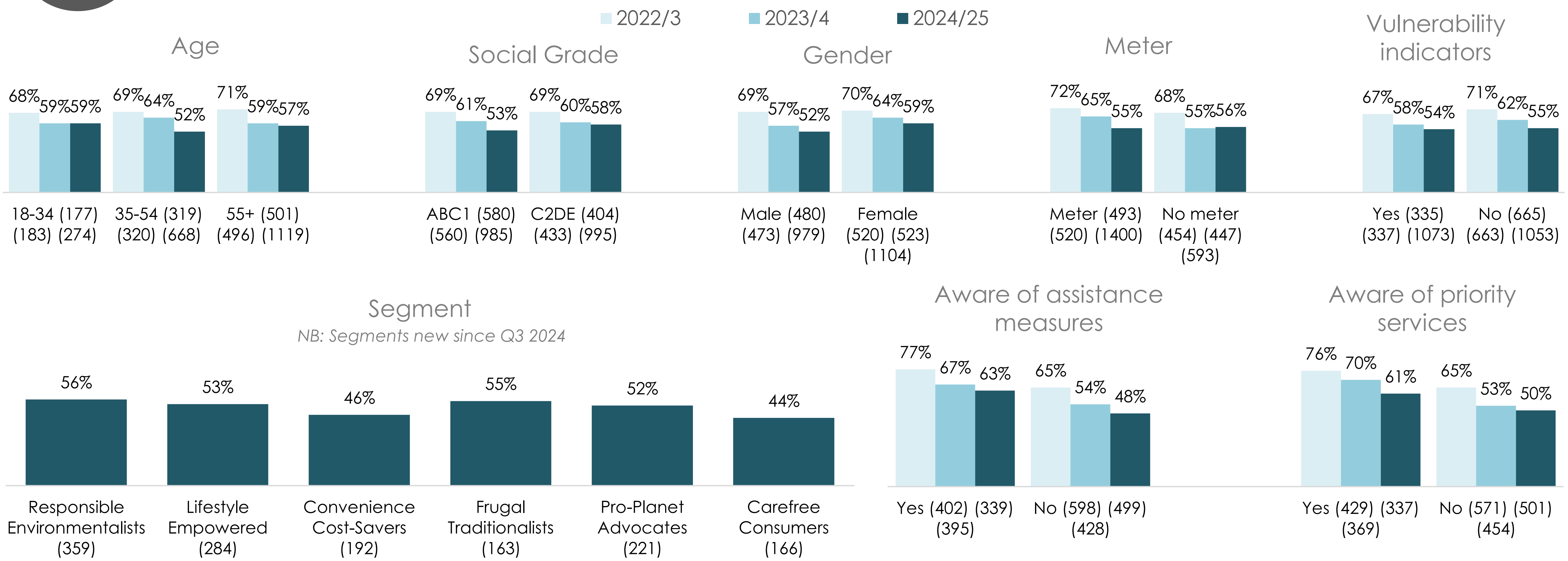
Value for money by key groups 2022/3; 2023/4; 2024/5

VFM ratings have dropped for most groups, especially for 35-54s, those on a meter and those aware of priority services. 'Carefree Consumers' and 'Convenience Cost-Savers' feel less satisfied here. *(NB: Sample change for 2024/25 to include non-bill payers)*

VFM

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

Base: Those who pay bills 2022/3 (838), Those who pay bills 2023/4 (823), All 2024/5 (2126)



Wessex Water priorities by segment 2024/5

	TOTAL (2126)	Responsible Environmentalists (359)	Lifestyle Empowered (284)	Convenience Cost-Savers (192)	Frugal Traditionalists (163)	Pro-Planet Advocates (221)	Carefree Consumers (166)
Ensuring a reliable water supply	9.5	9.6	9.6	9.5	9.7	9.4	9.3
Preventing sewage leaks into / entering rivers and the environment (1)	9.3	9.5	9.4	9.3	9.0	9.0	8.9
Giving great customer service	8.8	8.7	9.0	8.8	8.8	8.5	8.9
Investing to address future extremes in weather like drought and flooding	8.7	9.0	8.6	8.8	8.3	8.4	8.4
Supporting customers who struggle to pay their bills	8.1	8.0	8.1	8.3	7.9	8.4	7.8
Improving local habitats for plants and animals	8.1	8.4	7.9	8.3	7.3	8.3	7.5
Working with communities - for example local activities	8.1	8.2	7.9	8.2	7.5	8.1	7.6
Reducing their own carbon emissions	7.7	7.9	7.6	8.0	6.6	8.1	6.5
Being innovative and quick to launch new technologies	7.5	7.5	7.5	7.5	7.2	7.5	7.4
Promoting social equality and equal opportunities	7.0	6.8	7.0	6.9	6.2	7.6	6.5

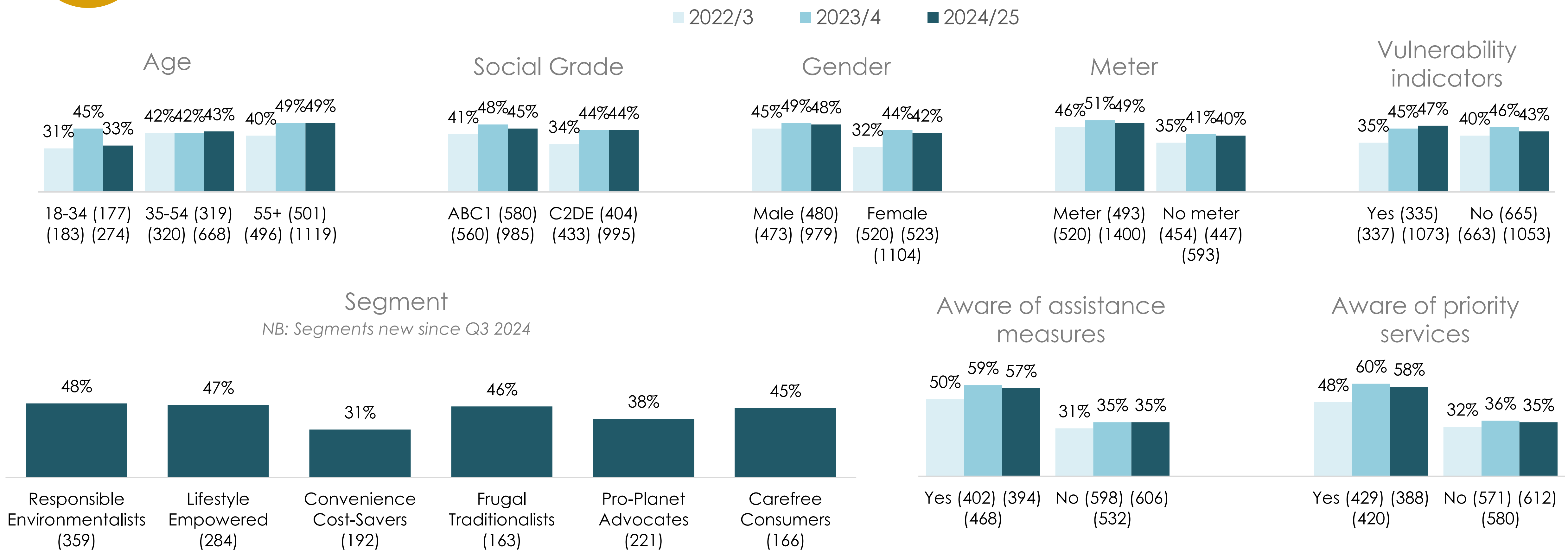
0.5+ ABOVE TOTAL | **0.4 ABOVE TOTAL** | **WITHIN +/-0.3 OF TOTAL** | **0.4 BELOW TOTAL** | **0.5+ BELOW TOTAL**

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').
All respondents 2024/5 (segment data is Q3-Q4 only)

Knowledge by key groups 2022/3; 2023/4; 2024/5

Knowledge about Wessex Water is similar to last year overall, though drops starkly for those 18-34. 'Convenience Cost-Savers' are the least likely to feel they know much about Wessex Water's operations, followed by 'Carefree Consumers'.

Q6. How much do you feel you know about Wessex Water and what they do? *% Know a lot or a fair amount*
(Base: All 2022/3, 2023/4 and 2024/5)



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

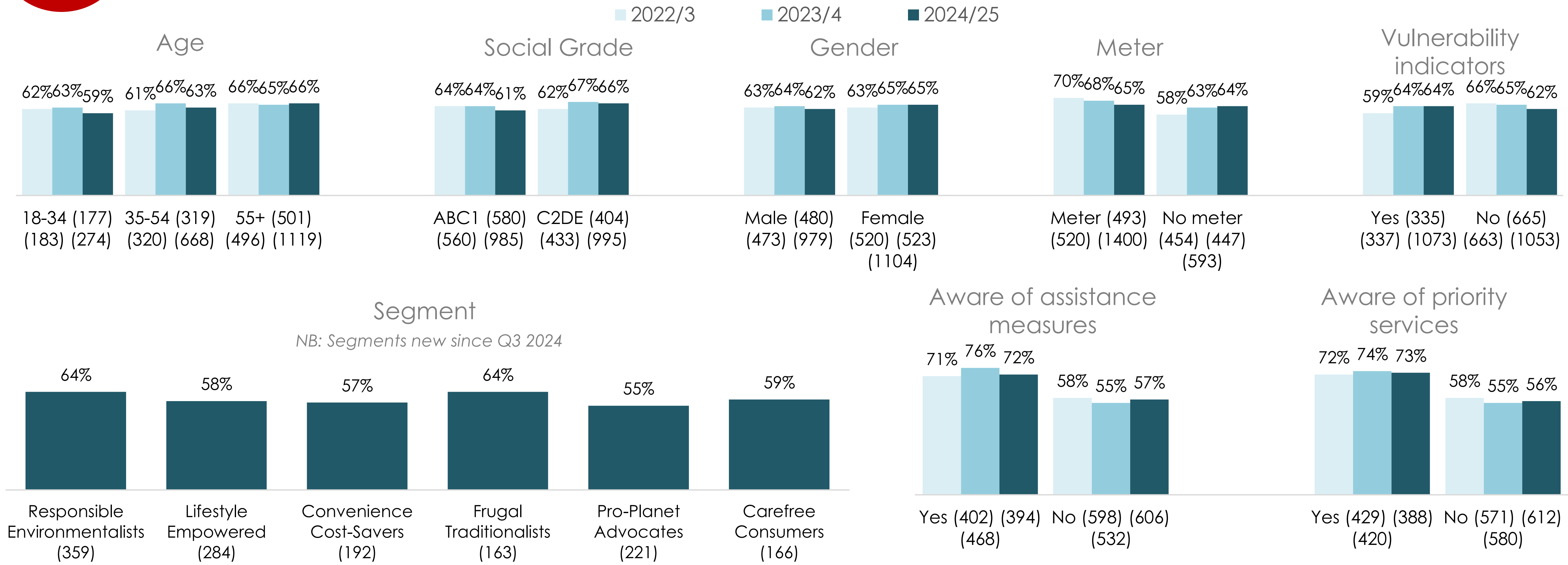
Sentiment by key groups 2022/3; 2023/4; 2024/5

Positive sentiment towards Wessex Water has remained relatively stable compared to last year, with no significant decreases. Sentiment is lowest among 'Responsible Environmentalists' and 'Frugal Traditionalists'.

Sentiment

Q4. Now thinking about Wessex Water. Please tell us how do you feel about them overall? *% Fairly/Very positive*

(Base: All 2022/3, 2023/4 and 2024/5)



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

Wessex Water imagery by segment 2024/5

‘Frugal Traditionalists’ are most likely to endorse positive imagery about Wessex Water, in line with having joint highest sentiment about Wessex Water too – especially for easy of contacting, openness and transparency and innovation. By contrast, ‘Pro-Planet Advocates’ are harshest on Wessex Water, followed by ‘Convenience Cost-Savers’.

	Total (2126)	Responsible Environmentalists (359)	Lifestyle Empowered (284)	Convenience Cost-Savers (192)	Frugal Traditionalists (163)	Pro-Planet Advocates (221)	Carefree Consumers (166)
Provide exceptional service	59%	60%	59%	52%	58%	50%	60%
They are easy to contact	59%	64%	60%	51%	65%	48%	62%
Fix any problems (quickly)	51%	51%	54%	47%	56%	44%	54%
Care about the environment	49%	49%	51%	41%	53%	43%	45%
Care about you and your community	46%	47%	44%	39%	49%	40%	44%
A responsible and ethical company that does the right thing	43%	41%	42%	40%	47%	36%	43%
An open and transparent company	41%	42%	44%	35%	47%	34%	45%
They are well regarded in your community	40%	38%	39%	37%	42%	36%	40%
Innovative and technologically advanced	35%	34%	40%	31%	43%	28%	38%

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 2024/5 (segment data is Q3-Q4 only)

Wessex Water performance by segment 2024/5

The segments are divided in half when it comes to rating Wessex Water's performance. 'Responsible Environmentalists', 'Lifestyle Empowered' and 'Frugal Traditionalists' hold Wessex Water's performance in more positive regard. 'Convenience Cost-Savers' are critical most often.

	Total (2126)	Responsible Environmentalists (359)	Lifestyle Empowered (284)	Convenience Cost-Savers (192)	Frugal Traditionalists (163)	Pro-Planet Advocates (221)	Carefree Consumers (166)
Making it straightforward for you to pay your bill in the way you prefer (bill payers only)	86%	86%	84%	83%	85%	88%	77%
Reliability of their services	78%	80%	78%	72%	77%	70%	70%
Providing clear and easy to understand information	72%	75%	72%	65%	76%	68%	61%
Keeping you up to date with their work in your area	61%	64%	59%	55%	66%	57%	58%
The range of methods through which you can contact them	60%	64%	61%	51%	66%	51%	61%
Making it easy for you to deal with them	60%	63%	64%	52%	65%	52%	56%
Helping you to save water (Wessex supply area only)	59%	60%	64%	44%	58%	53%	54%

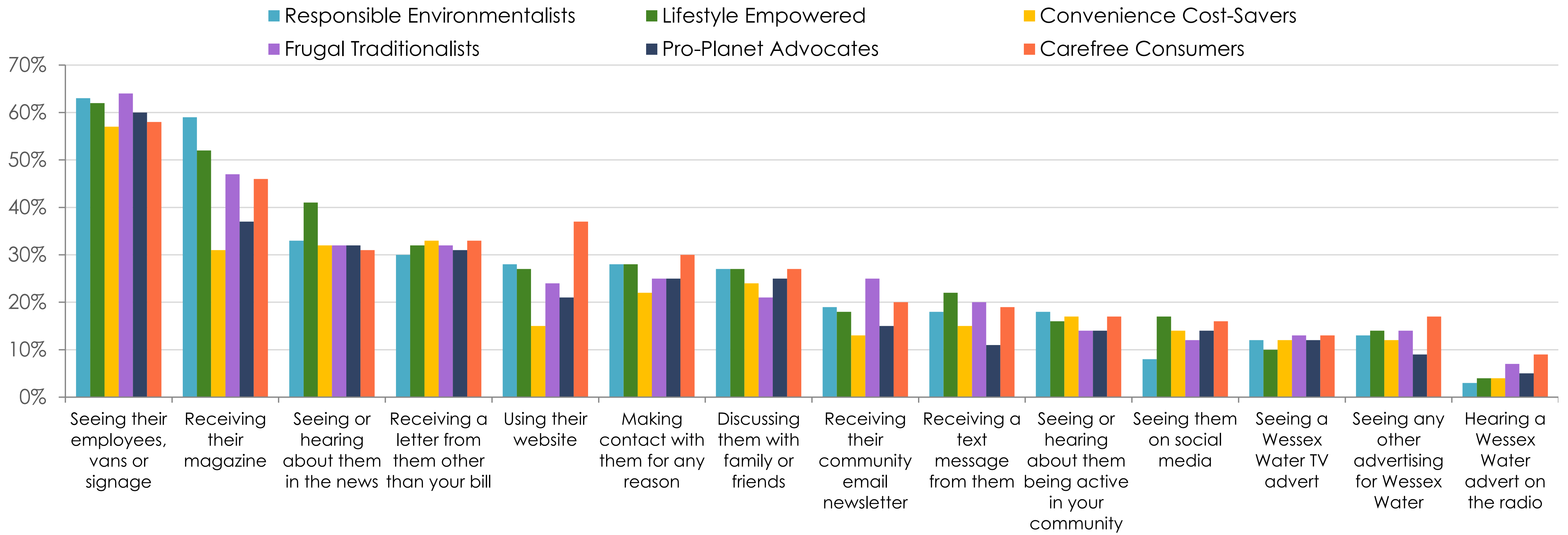
9% + ABOVE TOTAL | **6-8% ABOVE TOTAL** | **WITHIN +/-5% OF TOTAL** | **6-8% BELOW TOTAL** | **9% + BELOW TOTAL**

Q13. How would you rate Wessex Water's performance in the following areas? % rating 7-10 (10 = 'excellent' 0 = 'very poor').
Base: All respondents 2024/5 (segment data is Q3-Q4 only)

Prompted recall of Wessex touchpoints by segment (2024/5)

Seeing Wessex Water out and about is equal across the segments. For the second most common touchpoint - receiving Wessex Water's magazine - 'Responsible Environmentalists' score significantly above average, while Convenience Cost-Savers' and 'Carefree Consumers' are significantly below. 'Lifestyle Empowered' is notably higher for seeing Wessex Water featured in the news.

Q23. Thinking about Wessex Water, in the last six months do you recall…?
Base: All respondents 2024/5 (Q3-Q4) in each segment



Base sizes (2024/5): RE (359); LE (284); CCS (192); FT (163); PPA (221); CC (166).

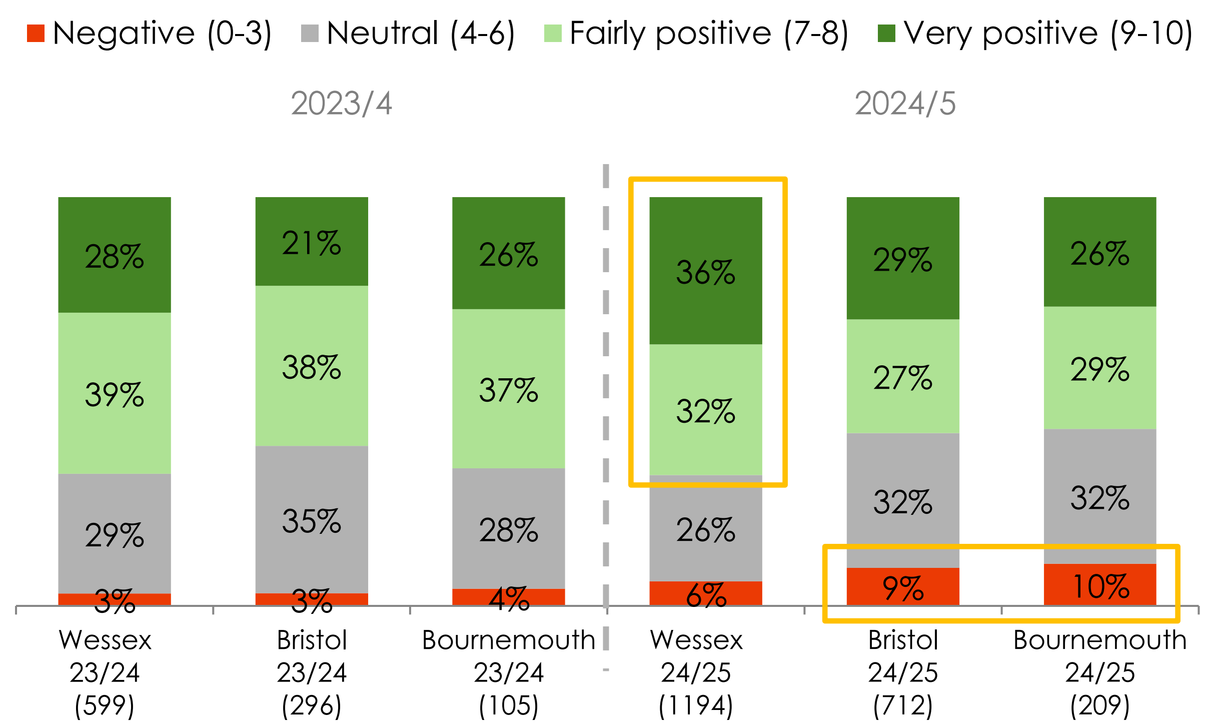
Appendix 2 – Supply area analysis

Photo by Robert Bye on Unsplash

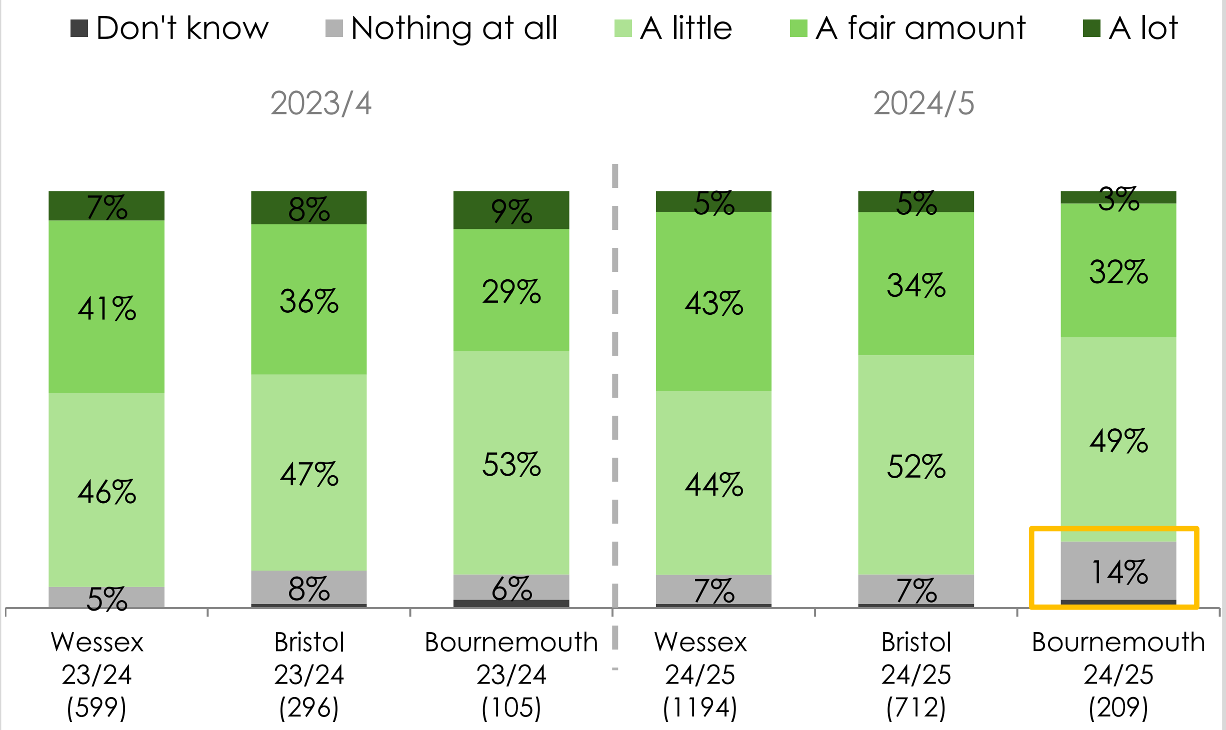
Sentiment and knowledge by supply area (2024/5)

The Wessex Water supply area is significantly more positive in sentiment towards Wessex Water than the other supply areas. Compared to last year, sentiment has directionally dropped for Bournemouth. Knowledge remains relatively stable across the areas this year – with those receiving dual service unsurprisingly knowing more about Wessex Water – though Bournemouth does.

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



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



Wessex Water key measures by supply area summary 2023/4

VFM ratings and the Trust Index score in Bournemouth were the highest across all supply areas, despite being the lowest last year. Other ratings increased to become more consistent with other areas. Bristol had 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

VFM based on all bill payers. Total (823); Wessex area (493); Bristol area (249); Bournemouth area (81)

Wessex Water key measures by supply area summary 2024/5

The Bournemouth Water and Bristol Water supply areas trail behind on most of the key measures when compared to the Wessex Water supply area. Most notably, VFM drops dramatically for Bournemouth this year after scoring highest last year.

	Total (2126)	Wessex Water supply area (1194)	Bristol Water supply area (712)	Bournemouth Water supply area (209)
Sentiment — Sentiment (% very or fairly positive)	63%	67%	57%	54%
Knowledge — Knowledge (% know a lot / fair amount)	44%	48%	39%	36%
Satisfaction — Satisfaction (% rate 7-10)	69%	73%	60%	61%
VFM — Value For Money (% rate 7-10)*	55%	56%	52%	50%
Trust — Trust Index	74.1	75.7	71.3	71.5
Mean number of Wessex Water touchpoints recall in the last 6 months	3.5	3.8	3.1	2.9

* VFM based on all bill payers. Total (2023); Wessex area (1153); Bristol area (686); Bournemouth area (183)

KEY: * Caution low base size

Appendix 3 – Bill payers and non-bill payers 2024/5

Photo by Nick Pampoukidis on Unsplash

Bill payers versus non-bill payers: Awareness and attitudes 2024/5

	Total (2126)	Bill payers (2023)	Non-bill payers (103)
'Don't know' who provides water to the home (**Q10**)	6%	4%	21%
Awareness that Wessex provides sewerage service (**Q9**)	73%	75%	52%
Satisfied (7-10) (**Q11**)	69%	69%	62%
Positive sentiment to Wessex (7-10, fairly/very positive) (**Q4**)	63%	65%	46%
Know a lot / a fair amount about Wessex (**Q6**)	44%	46%	28%
Priorities (Q7) – Bill payers significantly more likely to highly prioritise preventing sewage from entering rivers (81% vs. 79%), customer service (90% vs. 79%), investing to address future extremes in weather (87% vs. 73%), working with communities (78% vs. 67%), reducing carbon emissions (72% vs. 59%), and being innovative (69% vs. 52%).			
Image statements (agreement) (Q8) Bill payers significantly more likely to agree with all descriptors except 'they are well regarded in your community'.			
Performance statements (Q13) Bill payers significantly more likely to agree with all statements except 'making it straightforward to pay your bill' and 'providing information on how to prevent sewer blockages'.			
Agree charges acceptable (**Q18**)	46%	47%	36%
Aware of bill assistance (**Q20r1**)	41%	43%	22%
Aware of PSR (**Q20r2**)	43%	44%	30%

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS

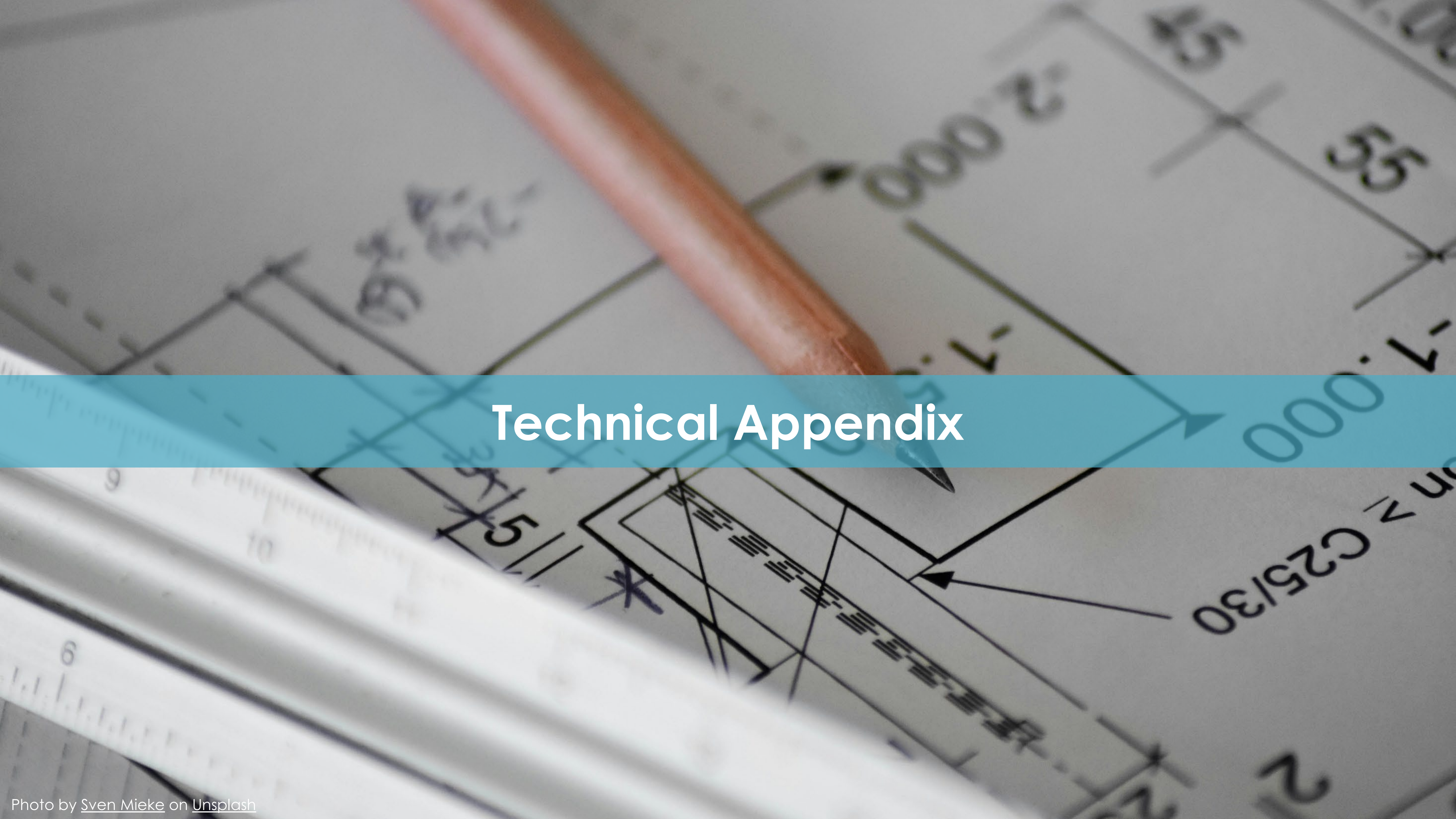
Non-bill payers were reintroduced into the sample in Q3 and Q4 2024/5

Bill payers versus non-bill payers: Touchpoints and demographics 2024/5

	Total (1,000)	Bill payers (838)	Non bill payers (162)
Made contact with Wessex for any reason in last 6 months? (**Q23**)	26%	27%	11%
Used Wessex website in last 6 months?	27%	29%	9%
Recall receiving magazine in last 6 months?	48%	50%	26%
Recall seeing or hearing about Wessex in the news	34%	35%	21%
Agree NET 'I'd be interested in having more frequent updates on how much water I'm using and how much it costs' (**QF1**)	50%	50%	48%
Social Grade: ABC1	53%	53%	58%
Social Grade: C2DE	40%	40%	42%
18-34	16%	14%	46%
35-54	33%	33%	27%
55+	47%	49%	27%

SIGNIFICANTLY HIGHER THAN BILL PAYERS **SIGNIFICANTLY LOWER THAN BILL PAYERS**

Non-bill payers were reintroduced into the sample in Q3 and Q4 2024/5



Technical Appendix

Photo by Sven Mieke on Unsplash

Technical Appendix

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

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

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

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

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

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