



Image Tracker April-June 2023

Summary of key results
19th July 2023



Headline Summary: April – June '23

- 1 The unprecedented pessimism about household finances finally shows signs of abating in the latest Quarter. However, many customers still think they will be worse off in 12 months' time.
- 2 During this period water industry news related to sewage was very prominent, with the public apology from Water UK in May. Annual water bills also arrived with customers during this Quarter.
- 3 Despite this wider context of negative media coverage of the industry, satisfaction with Wessex Water remains consistent with previous Quarters with no sign of being adversely affected.
- 4 However, with water bills landing, ongoing wider economic challenges, plus wider commentary around water companies' profits and chief exec pay, value for money ratings of Water Wessex and bill affordability are both showing signs of decline; value for money is at its lowest point to date.
- 5 Sewer overflows have become an even more top of mind and emotive issue for customers over the last Quarter, coinciding with the prominent media coverage. 1 in 5 now spontaneously mention sewage overflows as a key area for Wessex Water to improve on – the highest to level date and the biggest single area mentioned.
- 6 Over half agree with a new statement that they would be interested in more frequent updates on water use and cost. This is a much higher level than were interested in having a smart meter. This underlines that it is the benefits of smart metering that need to be promoted, rather than the smart meter itself.



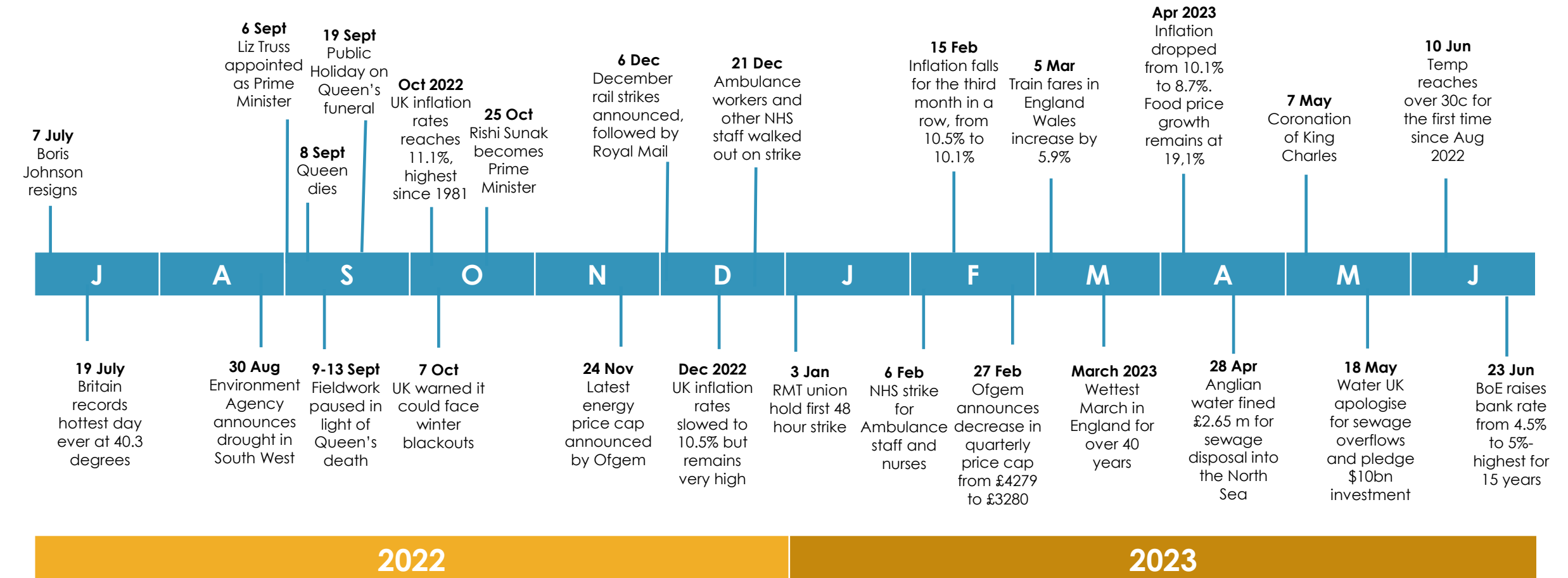


Wider context

Overall context: April – June '23

Water industry news related to sewage was prominent in the latest Quarter, with the public apology from Water UK receiving nationwide attention in May. Inflation showed some signs of reducing, but remained high, as interest rates hit a fifteen year peak of 5%, prompting concerns over mortgage payments.

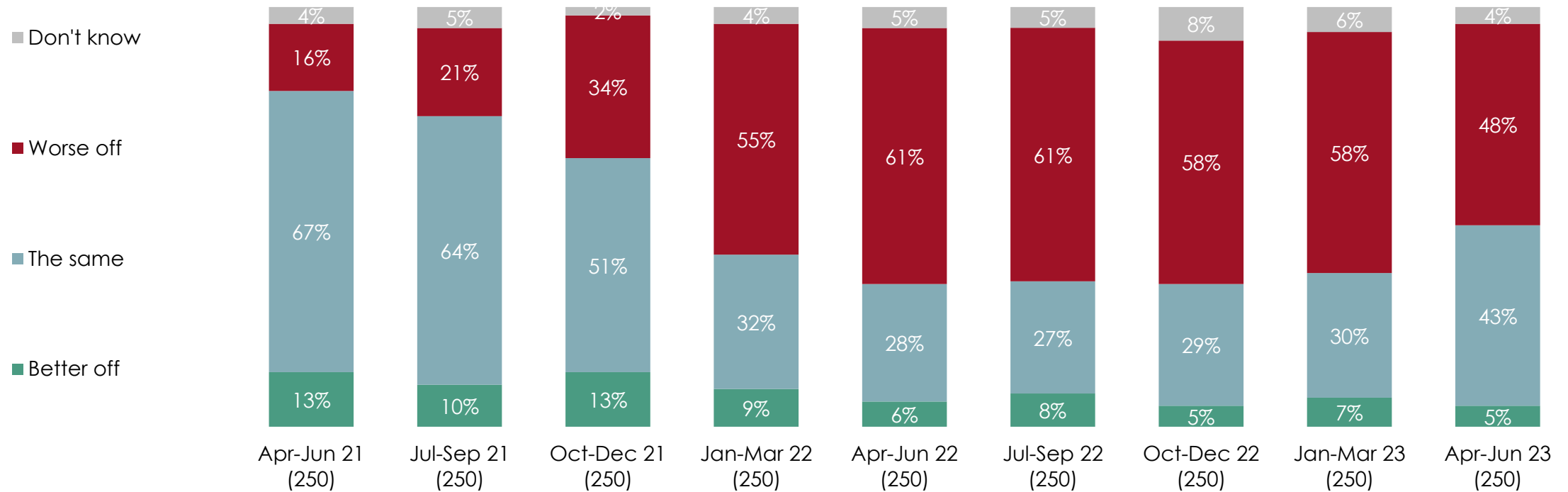
Timeline of key events



The unprecedented pessimism about household finances finally shows signs of abating in the latest Quarter. However, many customers still think they will be worse off in 12 months' time.



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



What's important for Wessex Water to focus on?

Order of priorities remain consistent, with 'ensuring a reliable water supply' and 'preventing sewerage leaks' topping the list. 'Working in communities' drops back relative to other priorities (note that wording of this will change in the next Quarter to better reflect the nature of Wessex Water's objectives when working in communities).

Q7. How important do you think it is for Wessex Water to focus on each of the following things?

Mean score (10 = 'a top priority' 0 = 'not a priority'). Base: All respondents

■ 2021/2022 (1,000) ■ 2022/2023 (1000) ■ Apr-Jun 2023 (250)





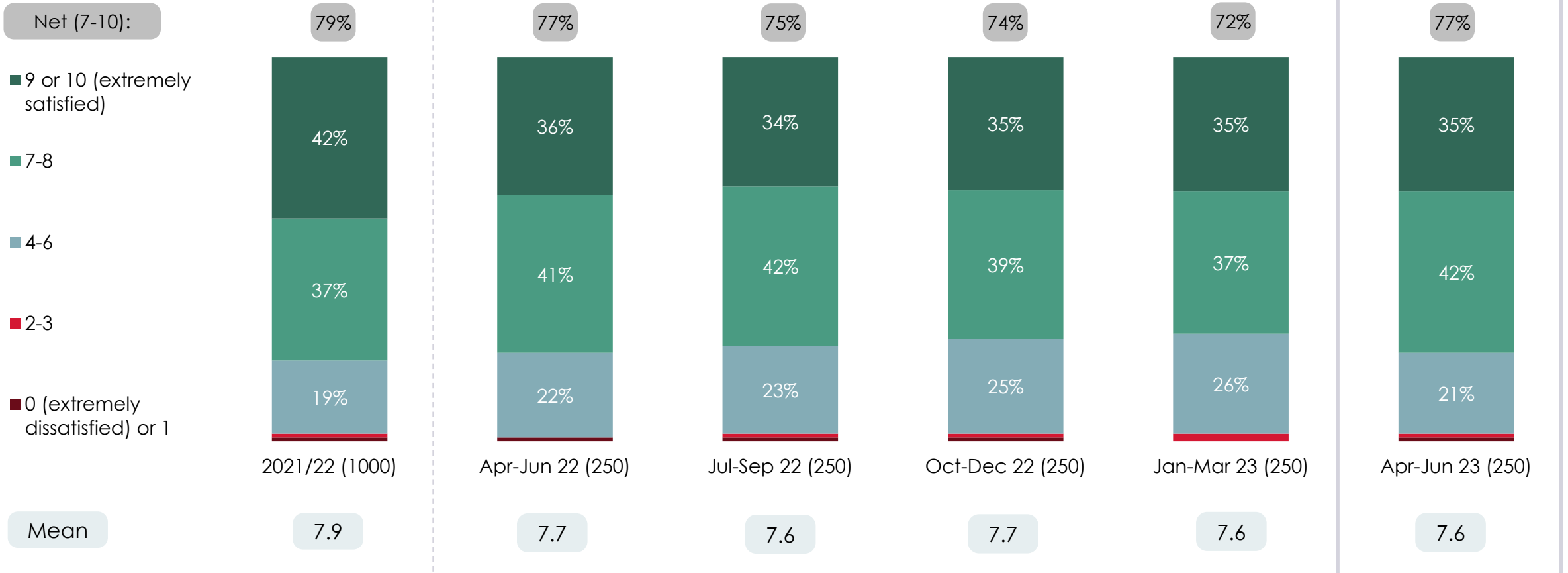
Core measures

Overall satisfaction

There is a directional uplift in overall customer satisfaction since the last Quarter; satisfaction does not appear to have been affected by negative media coverage of the water industry.



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



Overall value for money

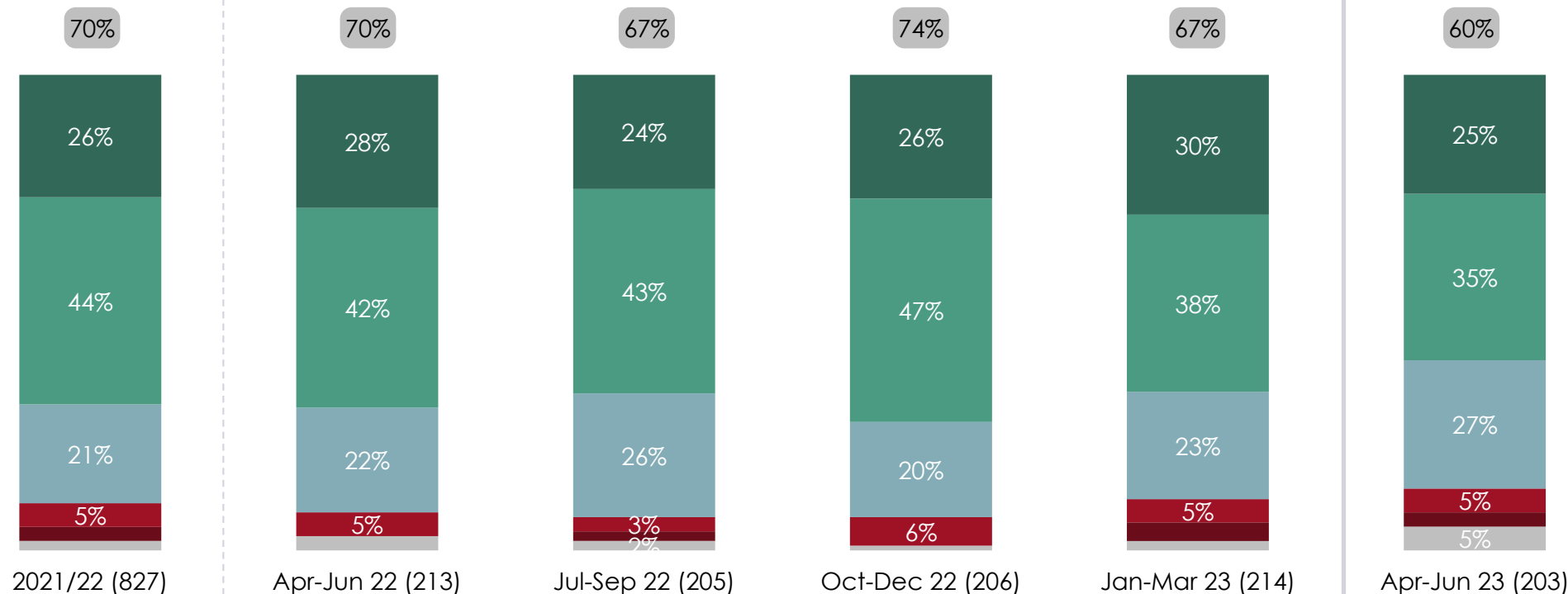
In the latest period, during which annual bills were issued, perceptions of Wessex Water’s value for money declined. Satisfaction with value for money is now significantly lower than this time last year - yet this is more down to greater ambivalence / uncertainty, rather than active negativity.



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

Net (Top 2):

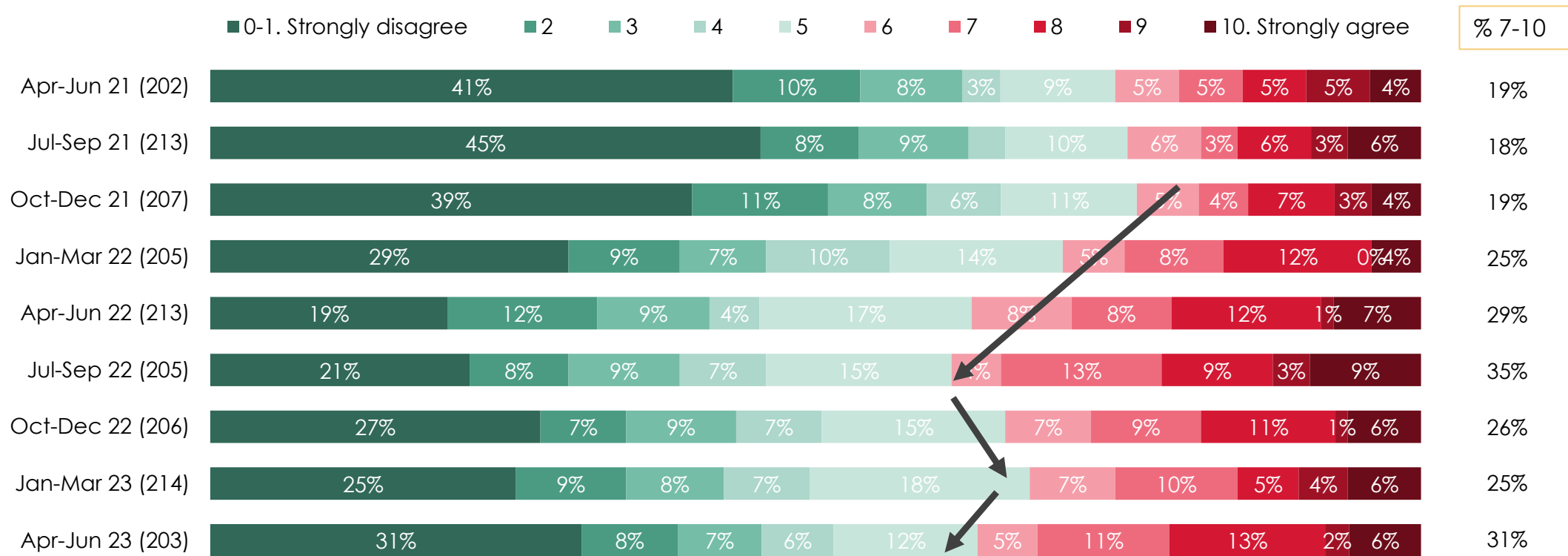
- Very satisfied
- Fairly satisfied
- Neither nor
- Fairly dissatisfied
- Very dissatisfied
- Don't know



Worry about affording the water bill had been tailing off slightly through Winter. However, in the latest Quarter, more customers are feeling worried again, as annual water bills arrive.

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

I worry about being able to afford my water bill

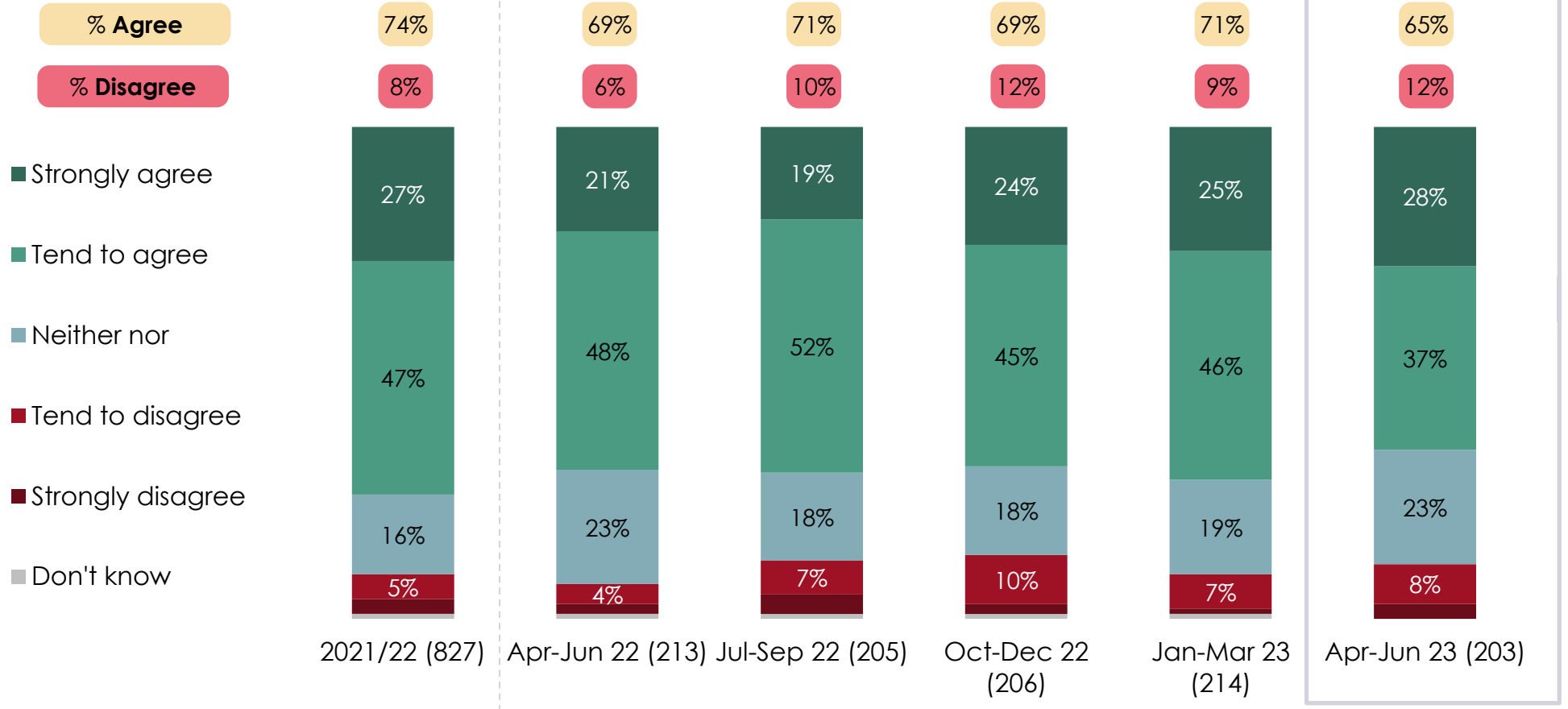


The proportion of customers who agree their bill is affordable is directionally lower than in previous waves, with signs that the minority who cannot afford their bill is growing again - perhaps in response to recent announcement of higher bills.



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

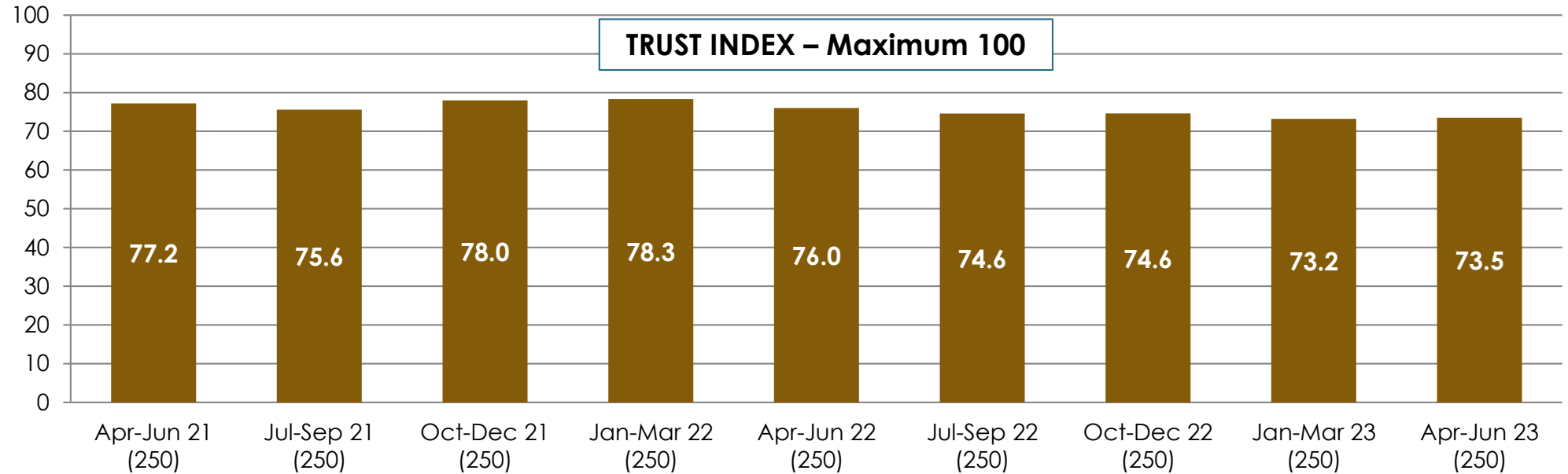




The new tracking study incorporates a number of image and performance measures that are known to drive trust based on components of trust from ICS and Edelman. The new 'Trust Index' is made up of **6 dimensions**

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

The Trust Index is based on the average scores of 6 components which can influence consumer trust. The overall scores are similar to the last Quarter, having been in slow decline since early 2022.



Components – Mean scores	Reliability and dependability	8.12	8.12	8.25	8.32	8.03	8.21	7.89	8.03	8.06
	Competence and capability	7.63	7.47	7.80	7.84	7.68	7.30	7.36	7.20	7.25
	Customer ethos	7.63	7.54	7.76	7.65	7.67	7.33	7.34	7.26	7.18
	Transparency	7.83	7.70	7.81	7.79	7.55	7.56	7.67	7.59	7.57
	Ethics	7.66	7.28	7.39	7.43	7.41	7.07	7.18	7.06	7.10
	Brand validation	7.42	7.28	7.40	7.62	7.28	7.05	6.90	6.70	6.94

New measure for Quarter 1 2023-4: Trust in Wessex Water to deliver a reliable water supply is almost universal, but trust in them to handle sewage/wastewater responsibly, while still reasonable, is much lower. It will be important to track these measures over time to give further insight on how trust evolves in light of wider media coverage.

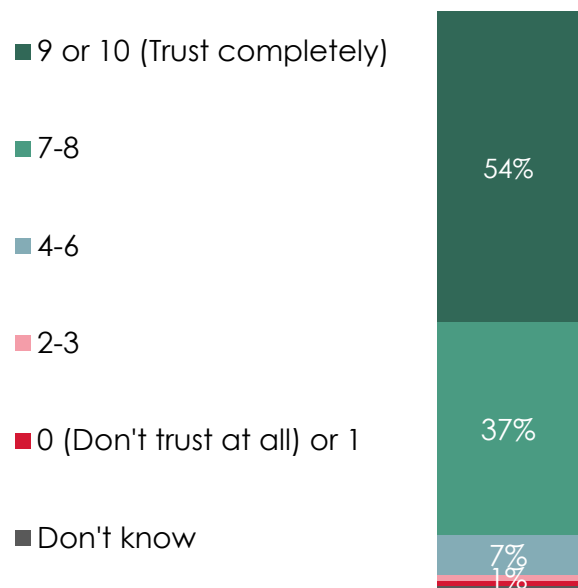


QT1 How much do you trust Wessex Water to provide a reliable supply of good quality tap water?

Base: All respondents

Net (7-10):

91%



Apr-Jun 23 (250)

Mean

8.6

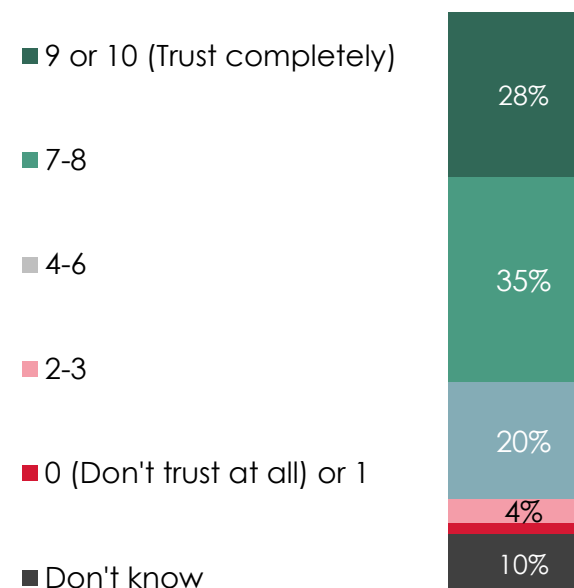


QT2 How much do you trust Wessex Water to take away wastewater and sewage and deal with it responsibly?

Base: All respondents

Net (7-10):

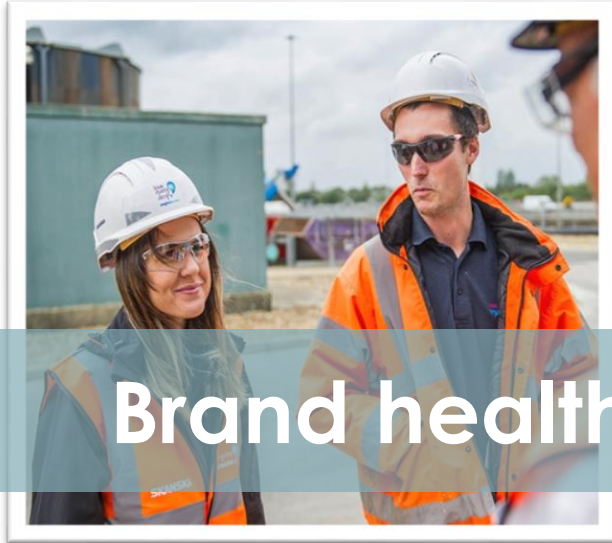
64%



Apr-Jun 23 (250)

Mean

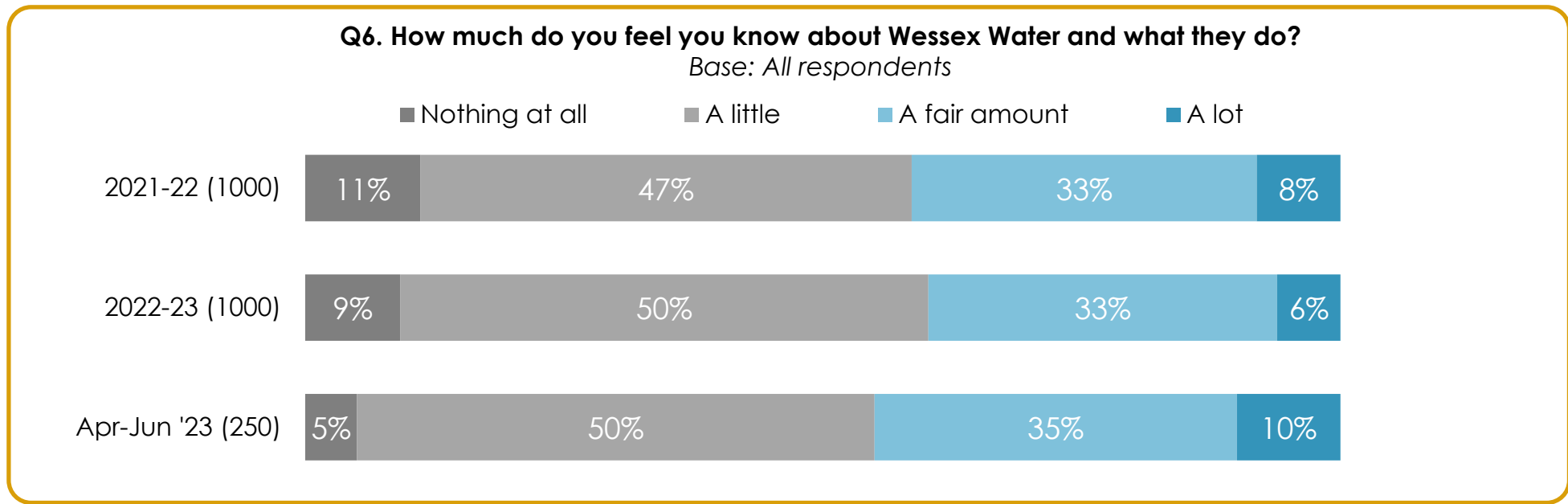
7.4



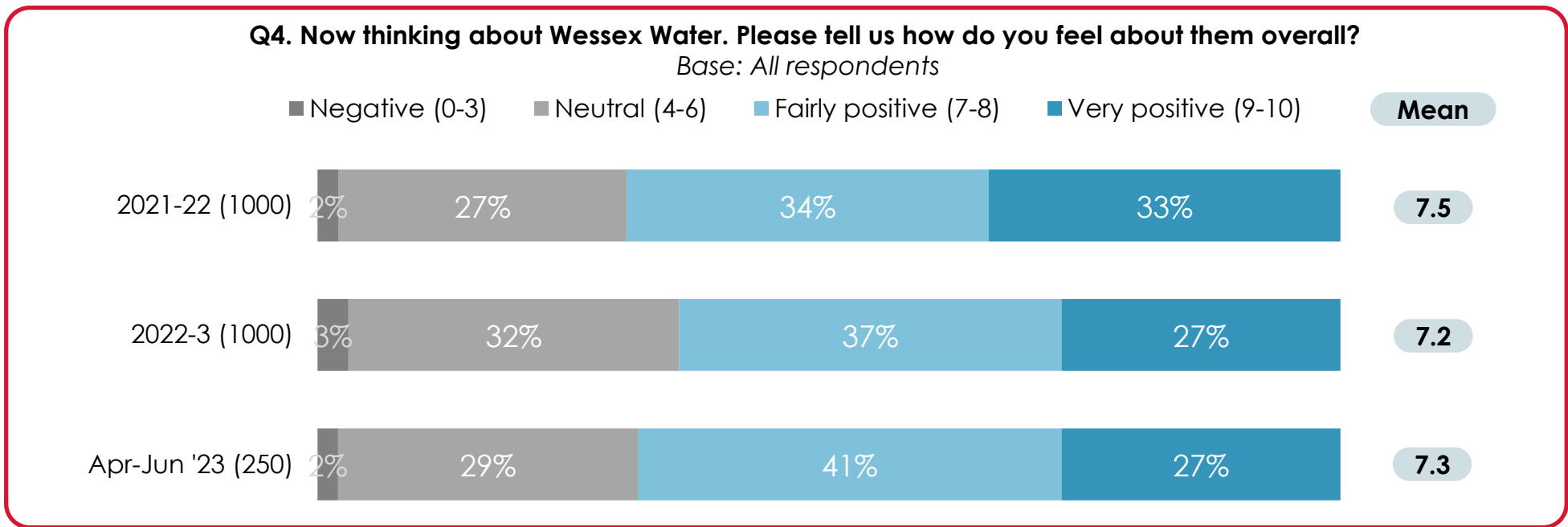
Brand health and image



Claimed knowledge in the latest Quarter is slightly higher than the overall scores in the last two years; this may be partly driven by recent media coverage of water industry issues.



Underlying positive sentiment towards Wessex Water remains consistent with the scores across 2022-2023, in spite of recent industry-level media coverage.

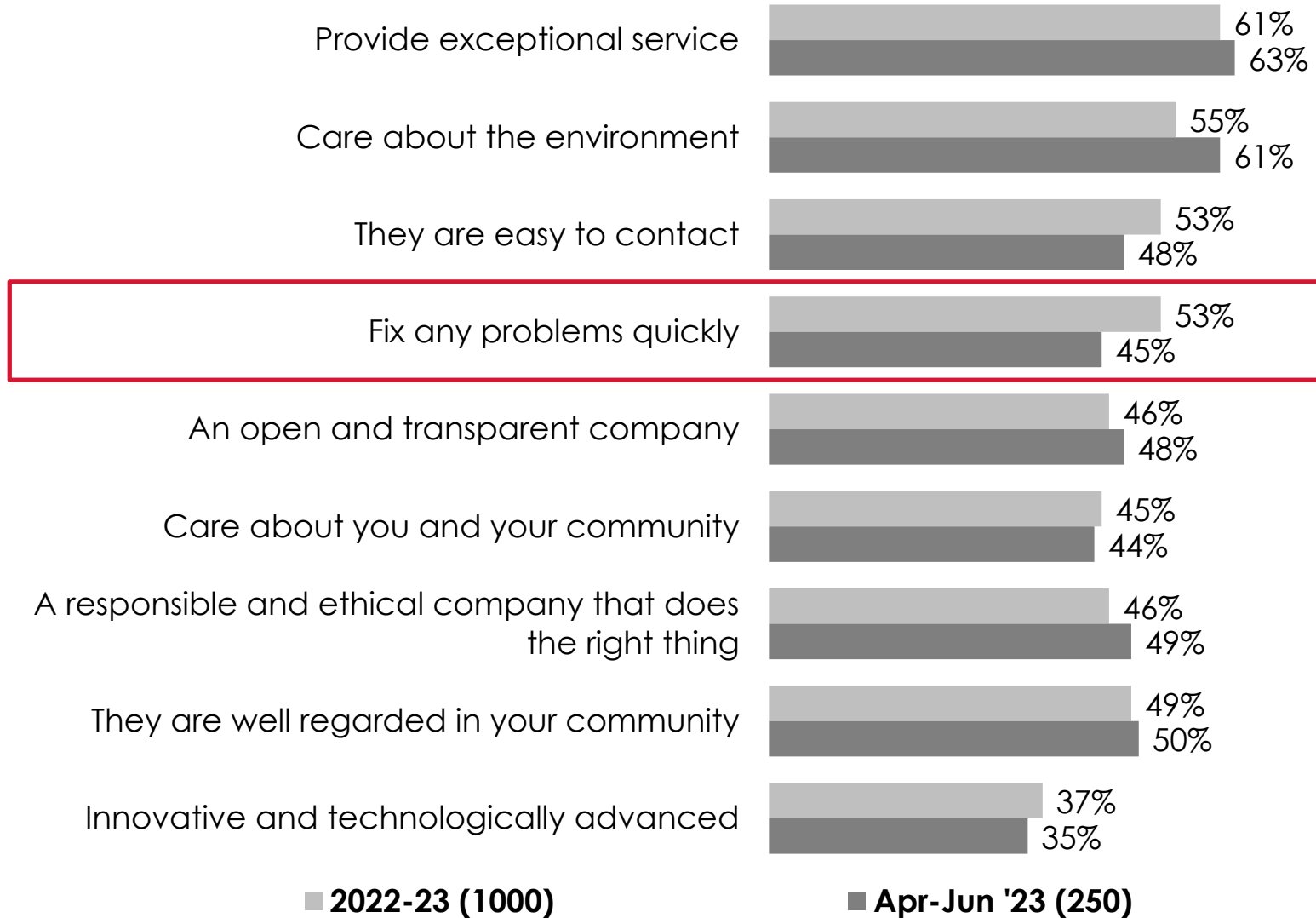




Most imagery scores in the latest Quarter are consistent to the 2022-23 levels. While endorsement of 'fix any problems quickly' drops; this is not down to active disagreement – it is more likely that fewer people have experience of Wessex Water's response to problems.

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

Base: All respondents



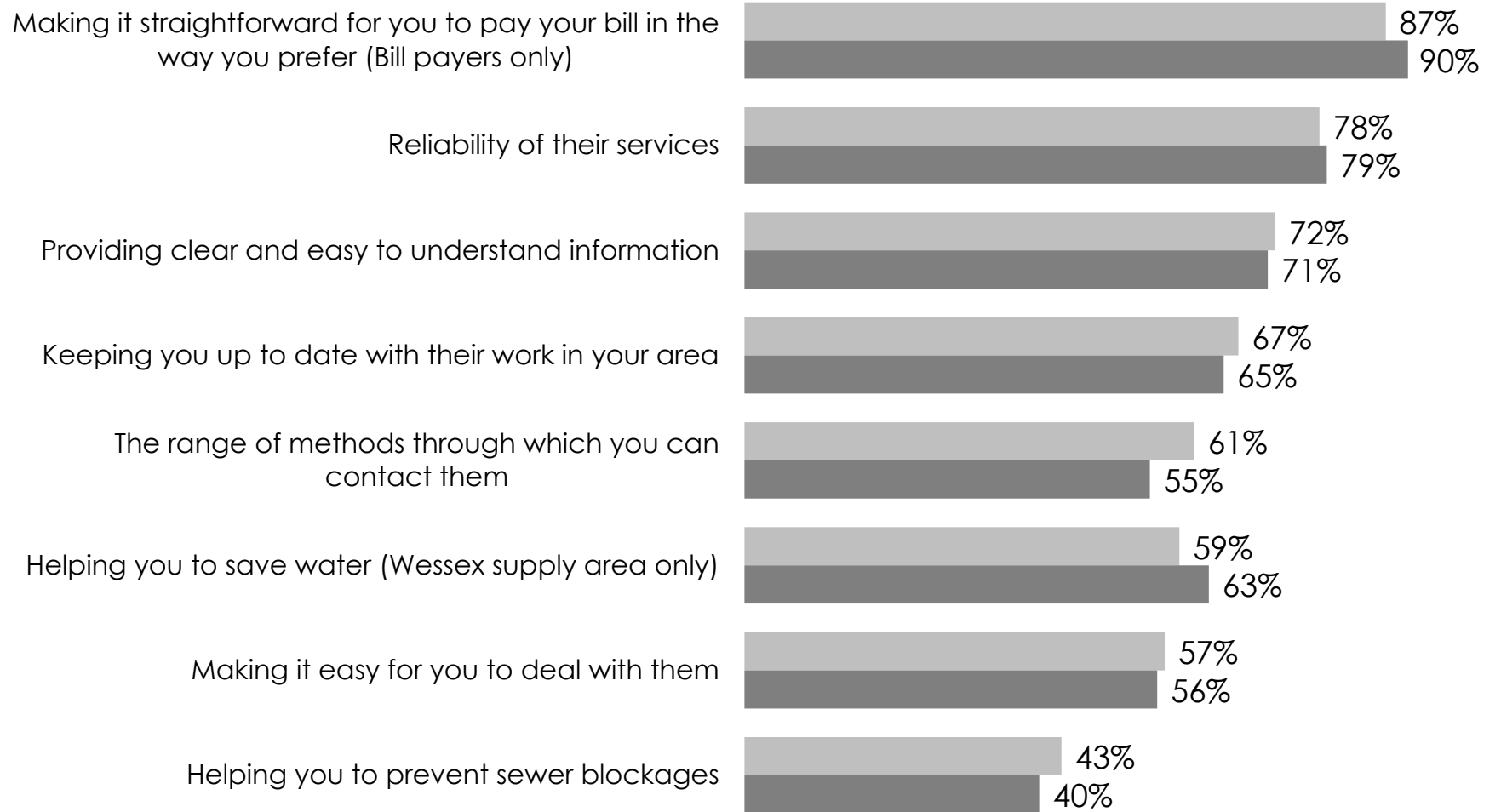


Most performance ratings remain consistent over time with only directional changes in the latest period. 'Reliability' – a key driver of satisfaction – continues to be strong. 'Helping prevent sewer blockages' has fallen again, to the lowest point to date, potential to boost communications in this area?

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

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

Base: All respondents



■ 2022-23 (1000) ■ Apr-Jun '23 (250)

Looking ahead, what can be improved?

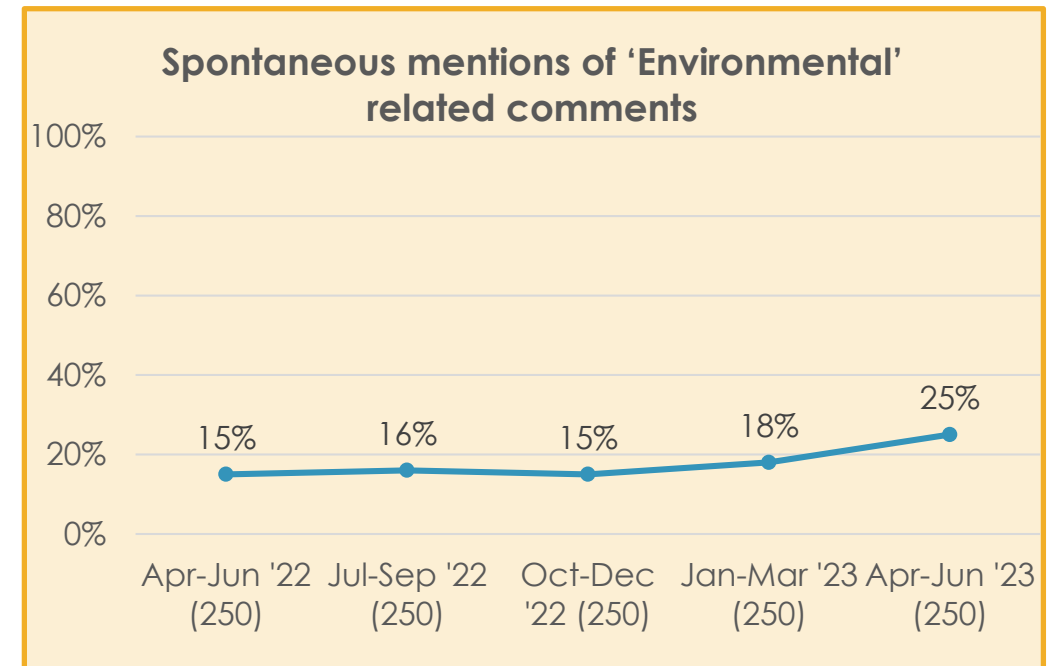
Environment-related issues are increasingly salient for customers. In the latest Quarter, as headlines focus on sewage spills, spontaneous mentions of 'no/less sewage in rivers / sea' has risen to 2 in 10 – a very substantial minority now have this top of mind as **the** issue Wessex Water should address. Signs that more customers also want to see better communication.

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

- Apr-Jun '22 (250)
- Jul-Sep '22 (250)
- Oct-Dec '22 (250)
- Jan-Mar '23 (250)
- Apr-Jun '23 (250)



Should be no / less sewage in rivers/sea	20%
Be more environmentally/eco friendly	1%
Look after rivers and wildlife	2%



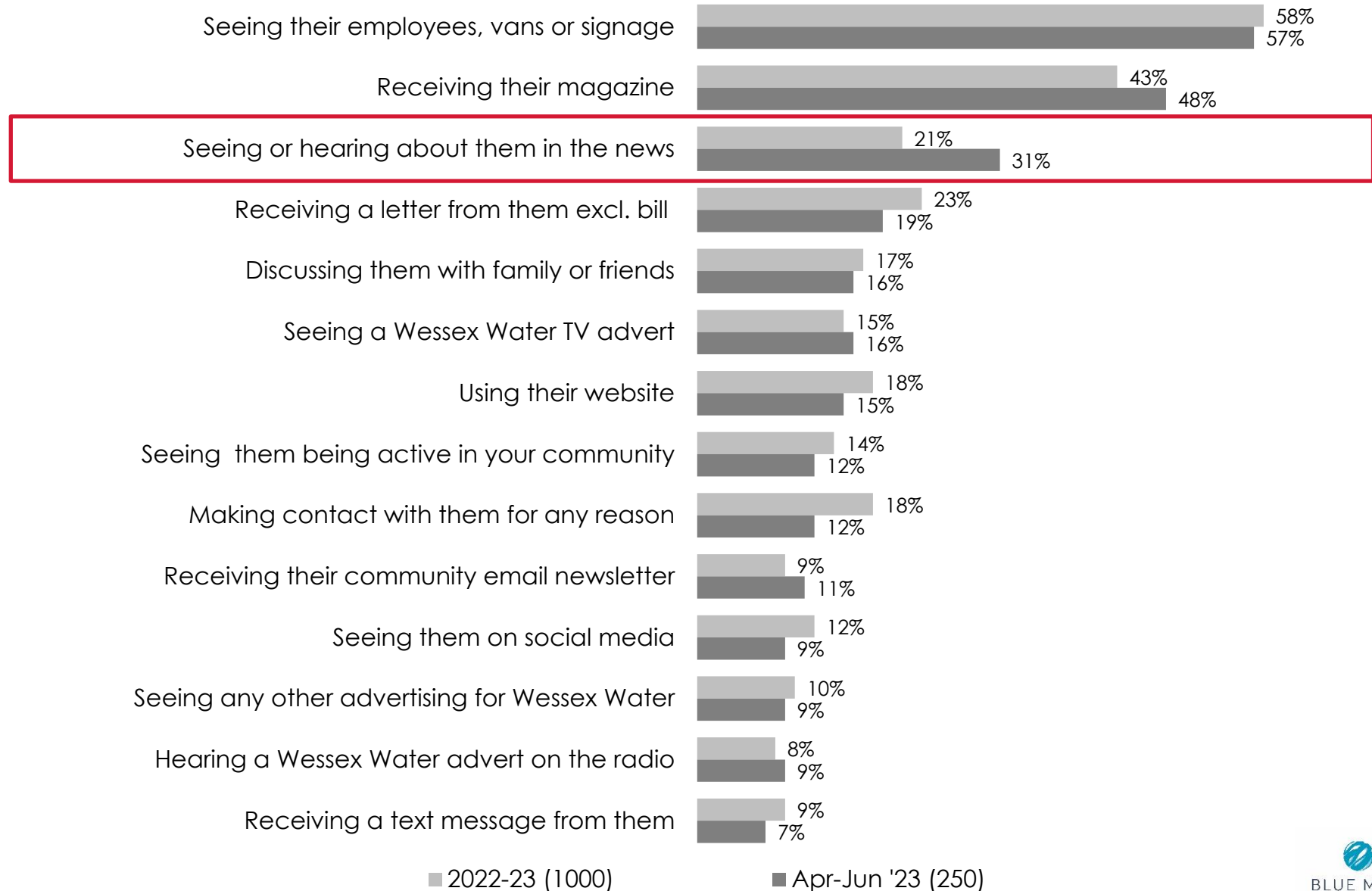
Recall of touchpoints



Employees/van/signage and the magazine continue to be the key touch points recalled. Almost a third recall seeing Wessex Water on the news in the last 6 months – this is a significant jump since last year and may reflect recent industry-level news coverage, rather than solely news coverage of Wessex Water.

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

Base: All respondents





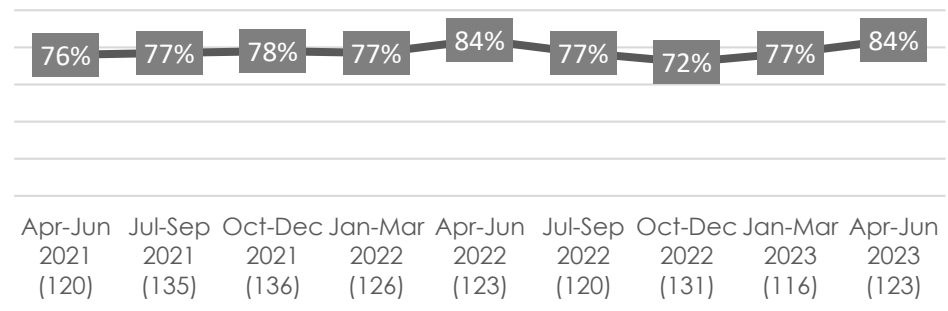
Water use behaviours

Attitudes to water use and metering

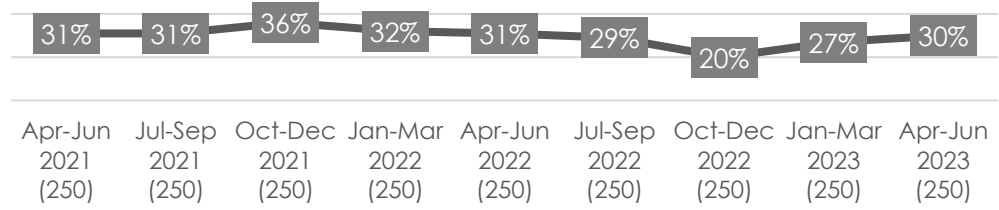
Over half agree with a new statement that they would be interested in more frequent updates on water use and cost. This is a much higher level than were interested in having a smart meter; it is the benefits of smart metering that need to be promoted, rather than the smart meter itself.



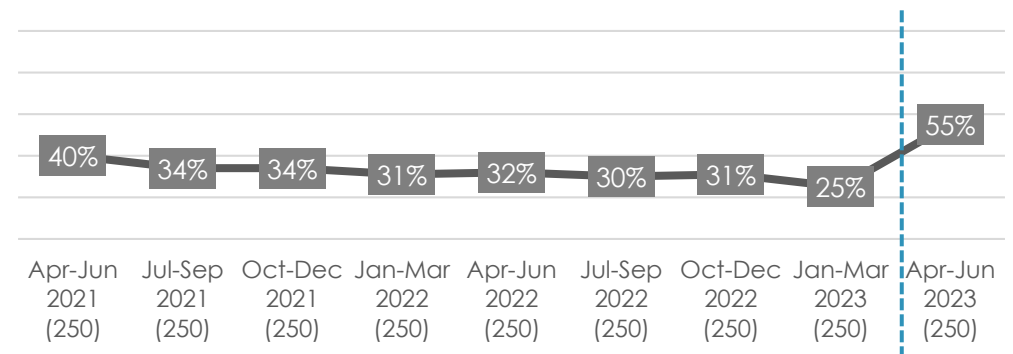
QF1. And how much would you agree or disagree with ...? % rating 7-10 (10 = 'strongly agree'). Base: All respondents



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



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



I'd be interested in having a smart meter

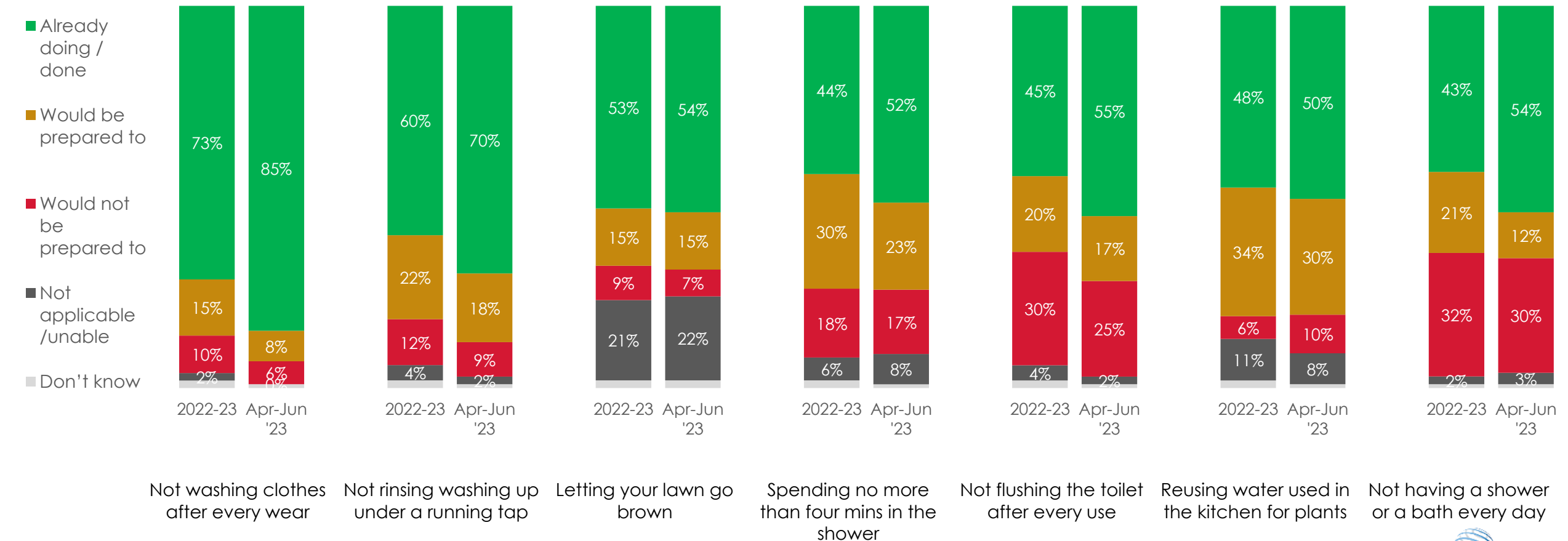
I'd be interested in having more frequent updates on how much water I'm using and how much it is costing**

*Base: Respondents with a water meter. **Question wording changed in Q1 2023-24 from "I'd be interested in having a smart water meter"

Water use behaviours

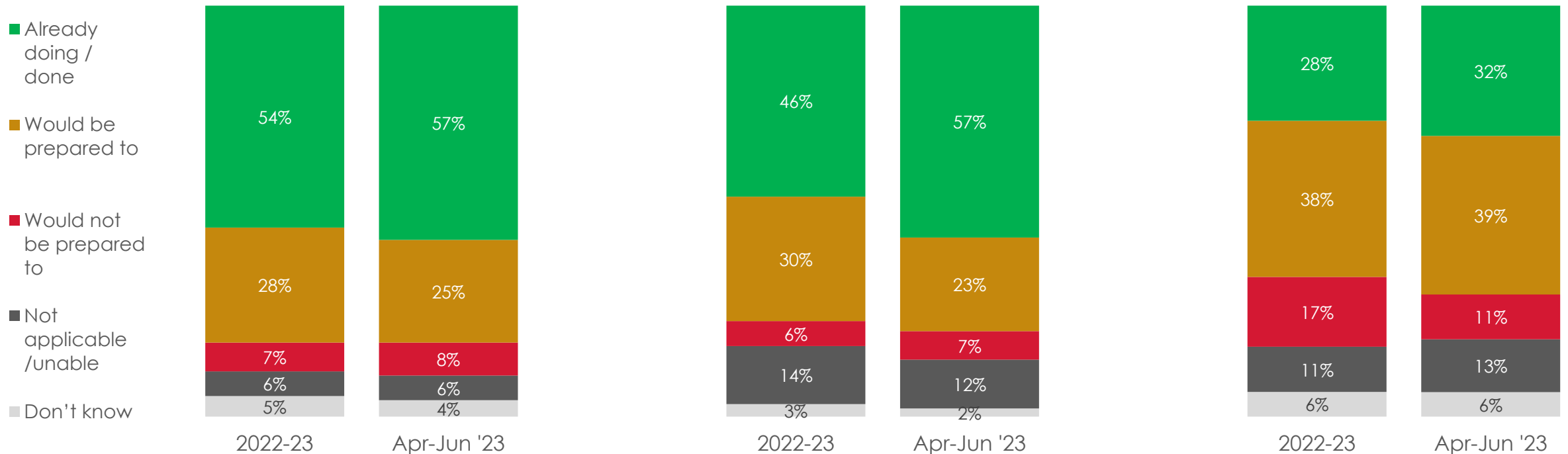
Claimed practice of some water saving behaviours is growing since last year, though there is still resistance to not having a bath or shower every day and not flushing the toilet after every use.

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 2022-23 (1000) Apr-Jun '23



The picture remains consistent in terms of installing of water saving devices, with opportunity to increase conversion on eco-shower heads in particular.

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: Base: All respondents 2022-23 (1000) Apr-Jun (250)



Install a water-efficient washing machine or dishwasher

Install a water butt

Fit an eco shower head with a lower flow rate

Impressions of water resources in region

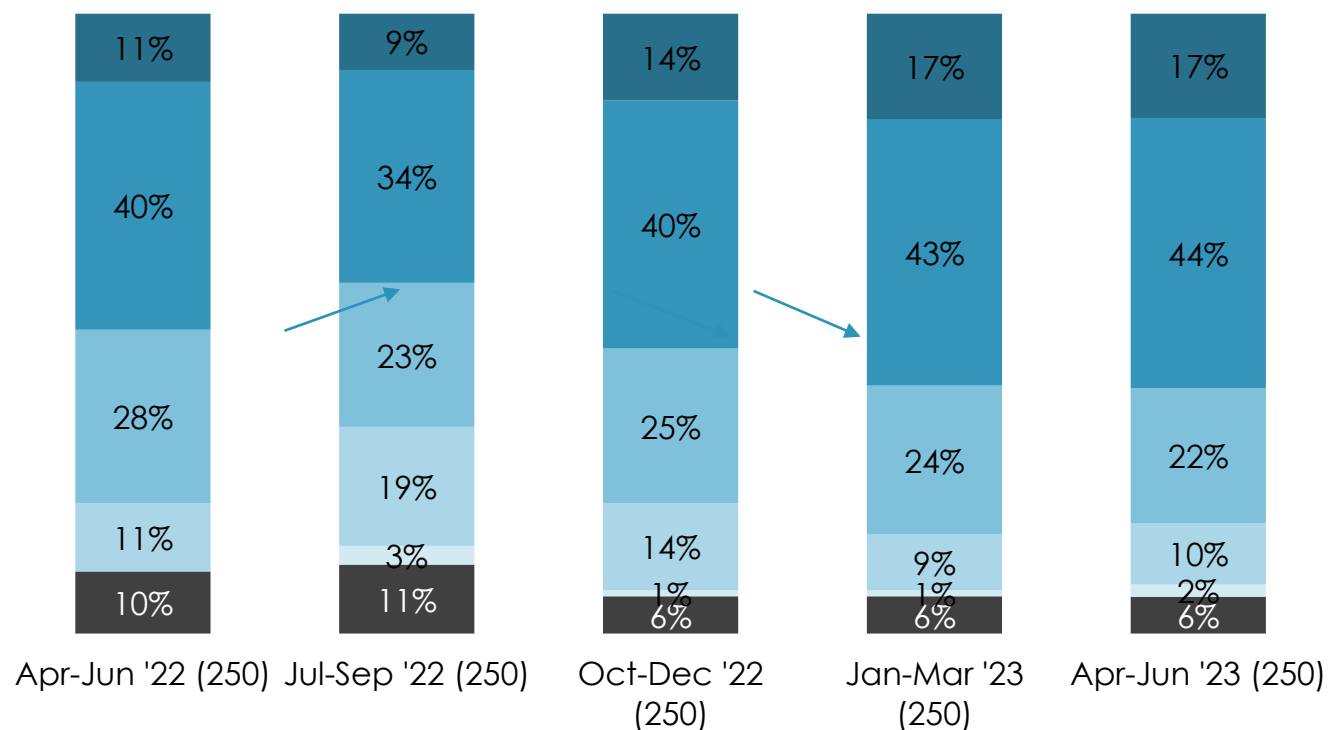
Perceptions of water resources appear to be swayed by seasonality and recent weather conditions. A wet and cool spring means consumers in the Wessex region still feel water sources are plentiful in the latest Quarter.

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 Apr-Jun '22 (250); Jul-Sep '22 (250); Oct-Dec '22 (250); Jan-Mar '23 (250)



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





Storm overflows

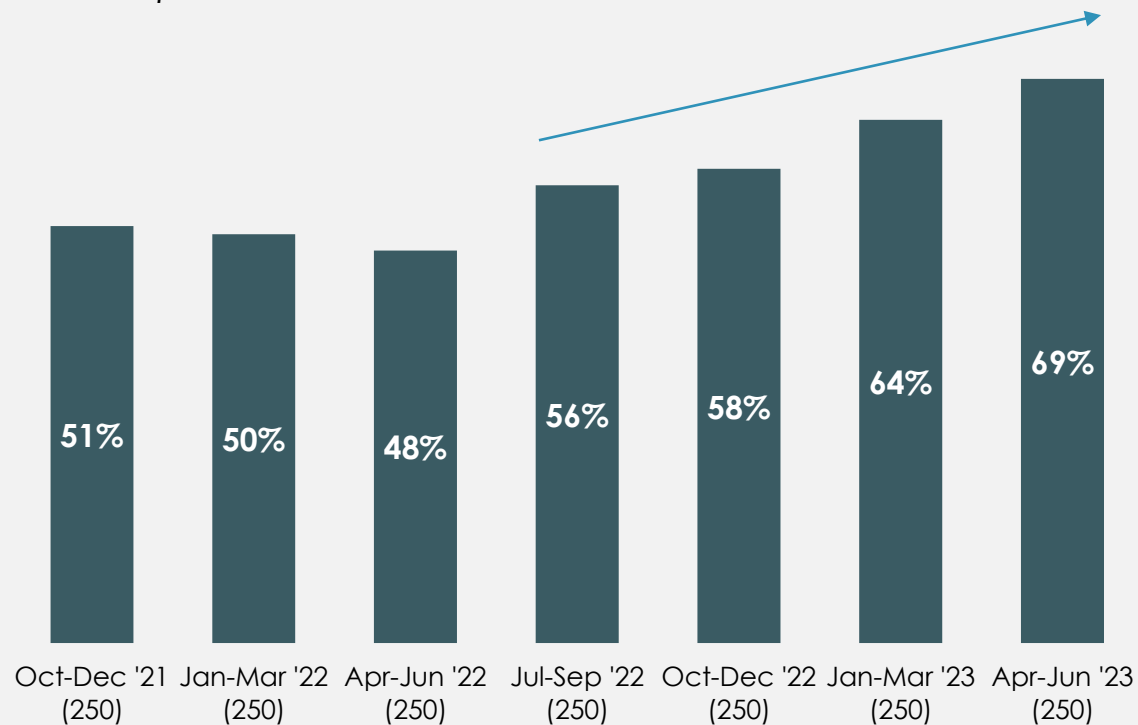


Awareness of storm overflows (CSOs) and river & sea water quality

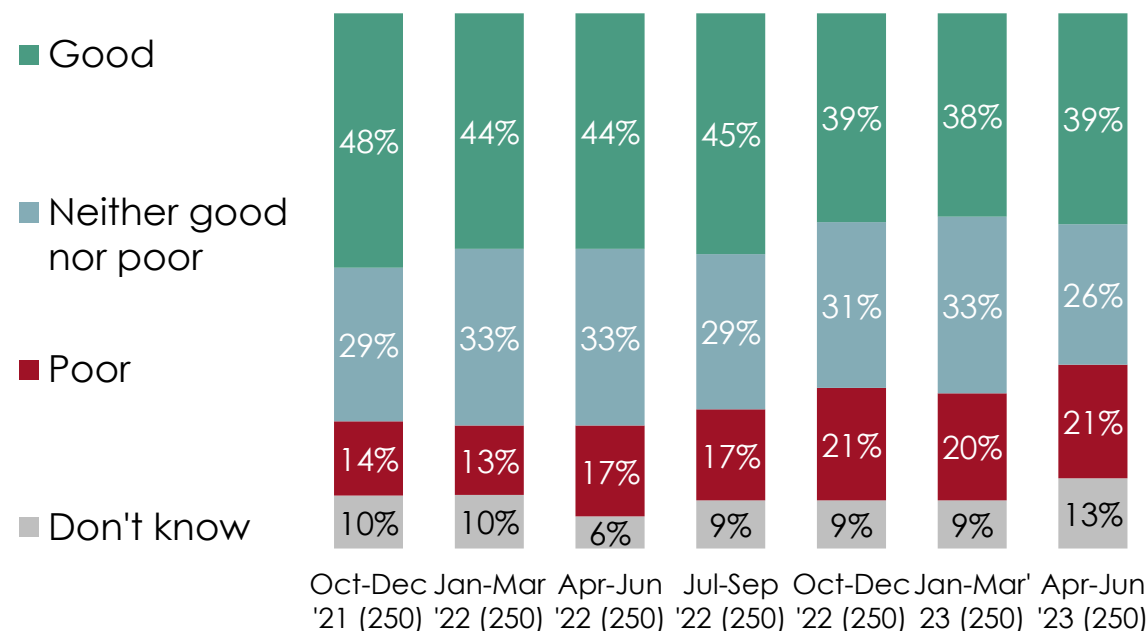
Awareness of storm overflows continue to rise; now almost 7 in 10 Wessex customers – the highest level to date which is highly likely to have been driven by prominent news coverage. Underlying perceptions of water quality of rivers and the sea in in the Wessex region are also showing signs of fading, although the balance of opinion is still positive.

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

Base: All respondents



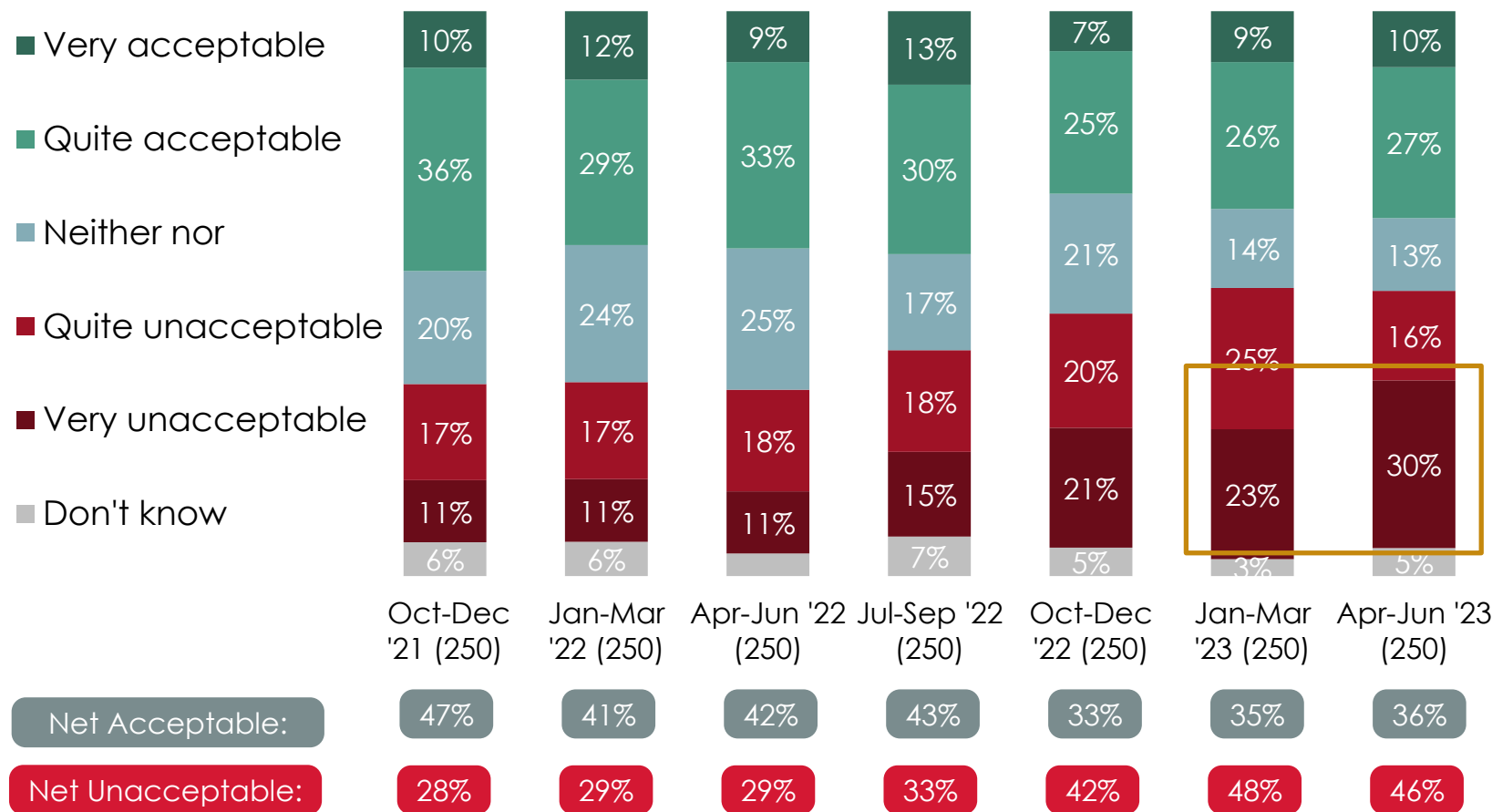
QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality? Base: All respondents



Acceptability of the operation of storm overflows (CSOs)

There has been a sizeable and sustained shift in the opinion of storm overflows after reading the description of how they operate. In the latest Quarter there are signs that the issue is more emotive than ever, as a greater proportion find CSOs 'very unacceptable'. Yet there does remain a mix of views, with over one in three still finding the operation of storm overflows acceptable.

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?**





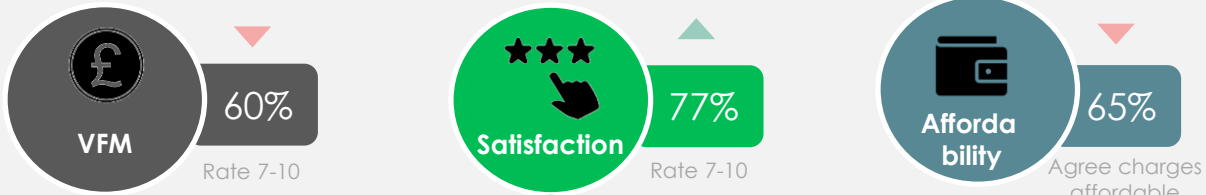
Blue Marble Research Ltd

www.bluemarbleresearch.co.uk

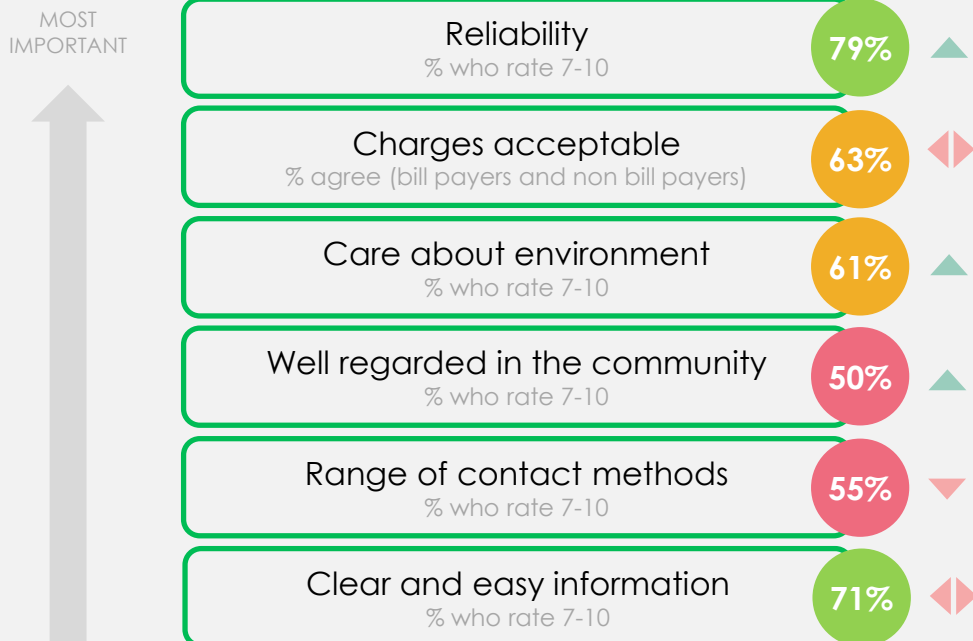
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Quarterly Dashboard Update (Apr-Jun 2023 vs. Jan-Mar 2023)

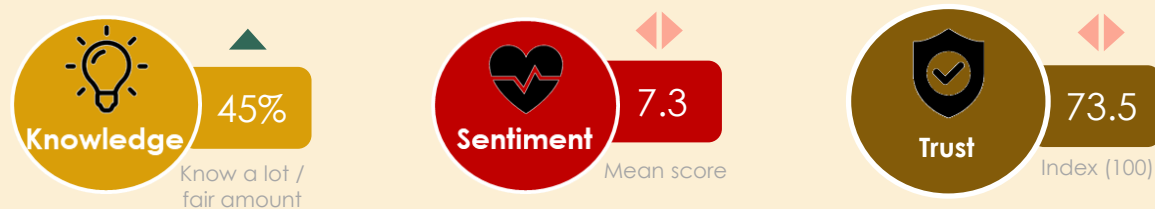
Core performance



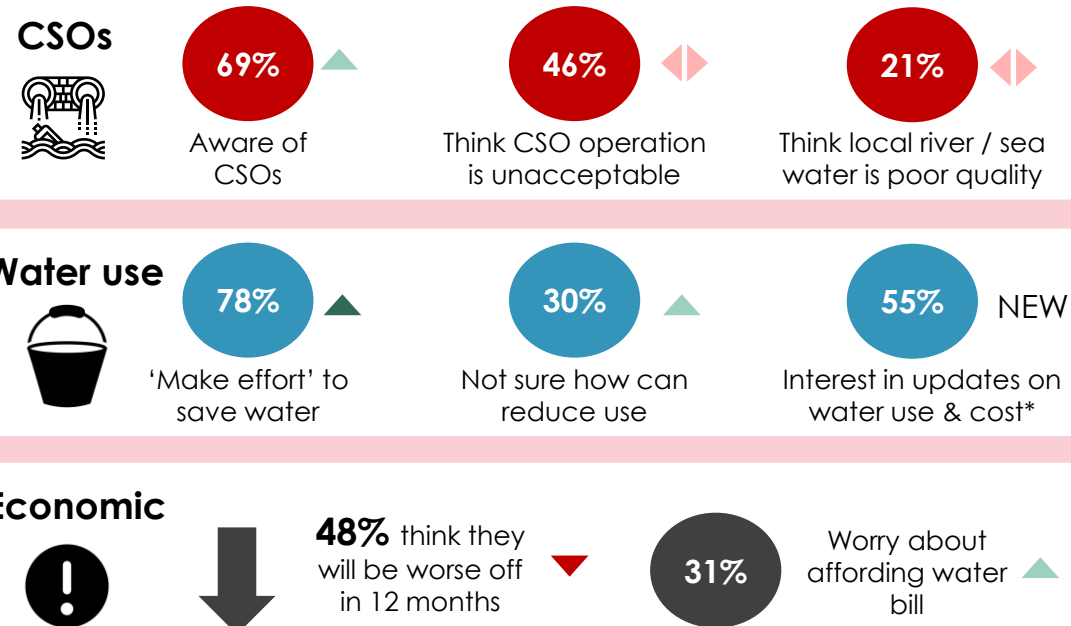
Satisfaction drivers



Brand health



Hot topics



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

Changes are Apr-Jun 2023 vs. Jan-Mar 2023

*denotes new measure in Q1 2023-4