



Image Tracker Apr-Jun 2024

Summary of key results
26th July 2024



	'21/ '22 – '23/ '24	'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
Sample source	Panel sample	Customer sample (from Wessex Water)
Bill payer status	80% bill payers 20% non-bill payers	100% bill payers only

Note: For the purposes of consistency, the report compares Q1 '24/'25 data with bill payer data from Q4 '23/'24, where appropriate, highlighted in grey boxes throughout the report.

Headline Summary: April – June 2024

1

There is greater uncertainty amongst Wessex Water customers regarding future finances. Fieldwork for this Quarter was conducted in June only, which may have reflected customers' attitudes towards General Election.

2

Satisfaction with Wessex Water and value for money holds steady. However, there is a decline in customers who feel water bills are affordable versus the previous Quarter, and a third feel anxious about their ability to afford the bills (which might be influenced by the greater levels of uncertainty around finances).

3

Levels of knowledge and positive sentiment towards Wessex Water is maintained. This Quarter, customers are more likely to endorse Wessex Water as being responsive, perceived to 'care about them and the community'. This, alongside greater recall of digital touchpoints suggests that the shift may be due to the greater proportion of online participants.

4

Levels of awareness of CSO/storm overflows falls for a second time and a handful are aware of what Wessex Water is doing to reduce reliance on this practice. The news is a key source of information on the topic, but Wessex Water comms appear to be cutting through.

5

Trust in Wessex Water to deliver good quality water and deal with sewerage has also declined; and more rate their rivers and sea as 'poor. There is a greater demand from customers for Wessex Water to be environmentally friendly and ensure that the water supplies are sustainable

6

Water saving behaviours and attitudes generally hold stable. Interest in the benefits of smart meters has increased and has returned to levels similar to Q1 last year.

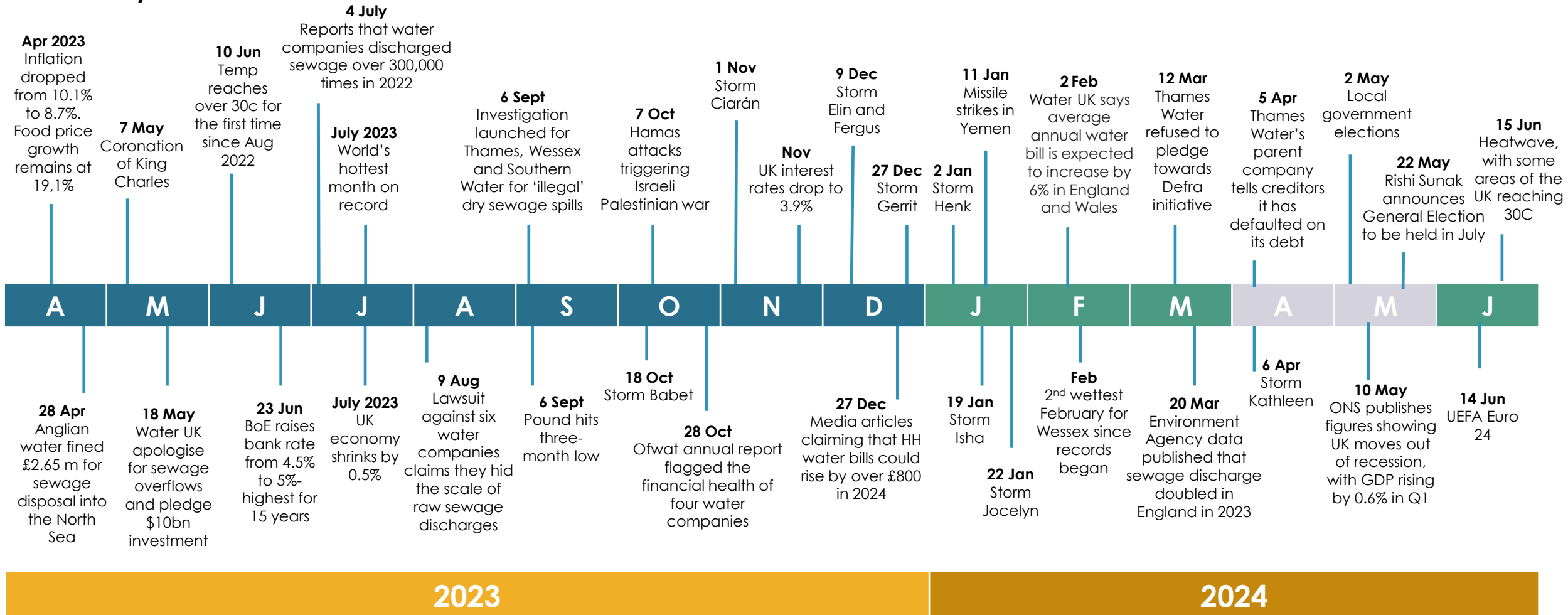


Wider context

Overall context: Apr-Jun 2024

It has been a cooler and drier than average summer* compared to previous years. Thames Water's financial situation continues to be in the spotlight and the public have generally been occupied with the general election (and perhaps the UEFA Euro 2024).

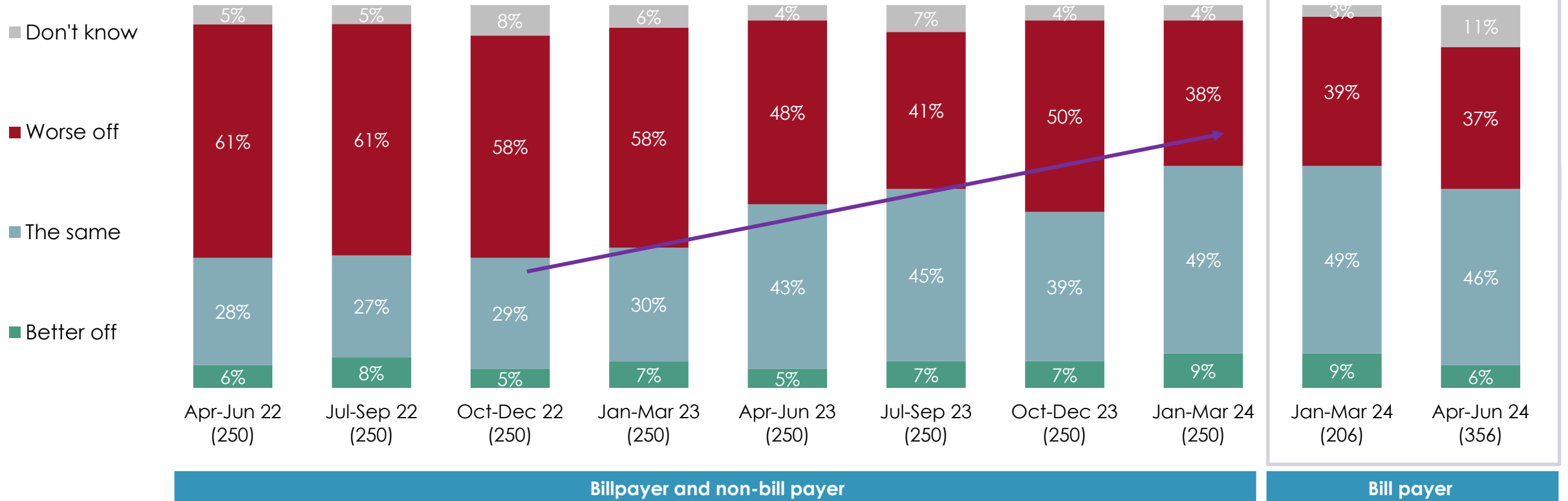
Timeline of key events



Consumer financial confidence holds steady amongst bill payers – however a greater proportion of Wessex Water bill payers feel uncertain about their financial circumstances in the upcoming year.



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?

Ranking of priorities remains generally consistent with 2023/2024. However, there is a greater emphasis this Quarter for ensuring a reliable (and sustainable) water supply, being innovative and customer service.

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

	Q1 (Apr-Jun) 2024 (bill payers only) mean (356)	Q4 23/24 bill payer mean (206)	Q4 23/24 mean (250)	2023/2024 mean (250)	2022/2023 mean (1000)
Ensuring a reliable water supply	9.6	9.4	9.5	9.2	9.2
Preventing sewage leaks into / entering rivers and the environment	9.4	9.3	9.3	8.9	8.9
Giving great customer service	8.9	8.6	8.7	8.5	8.5
Investing to address future extremes in weather like drought and flooding	8.8	8.1	8.1	7.9	7.9
Improving local habitats for plants and animals	8.4	8.6	8.6	8.4	8.4
Working with communities e.g working together locally to improve the environment/save water**	8.3	8.2	8.2	8	8.1
Supporting customers who struggle to pay their bills	8.0	8	8	7.5	6.9
Reducing their own carbon emissions	8.0	7.9	7.9	7.7	7.8
Being innovative and quick to launch new technologies	7.7	7.5	7.5	7.3	7.4
Promoting social equality and equal opportunities	7.1	7.1	7.2	7.1	7.2
Bill payer only			Bill/Non bill payer		

New wording introduced at Q2 2023-4**

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

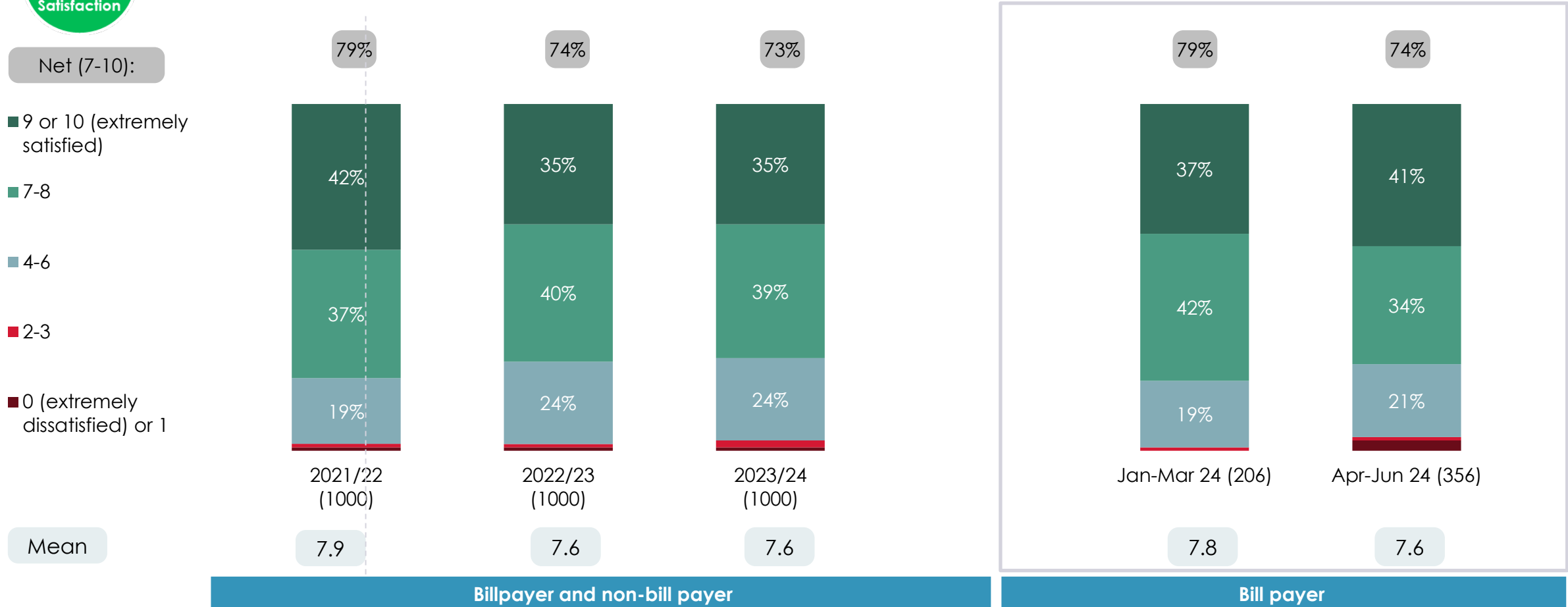


Core measures

Satisfaction with Wessex Water is down amongst bill payers versus the previous Quarter, but not significantly so.



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

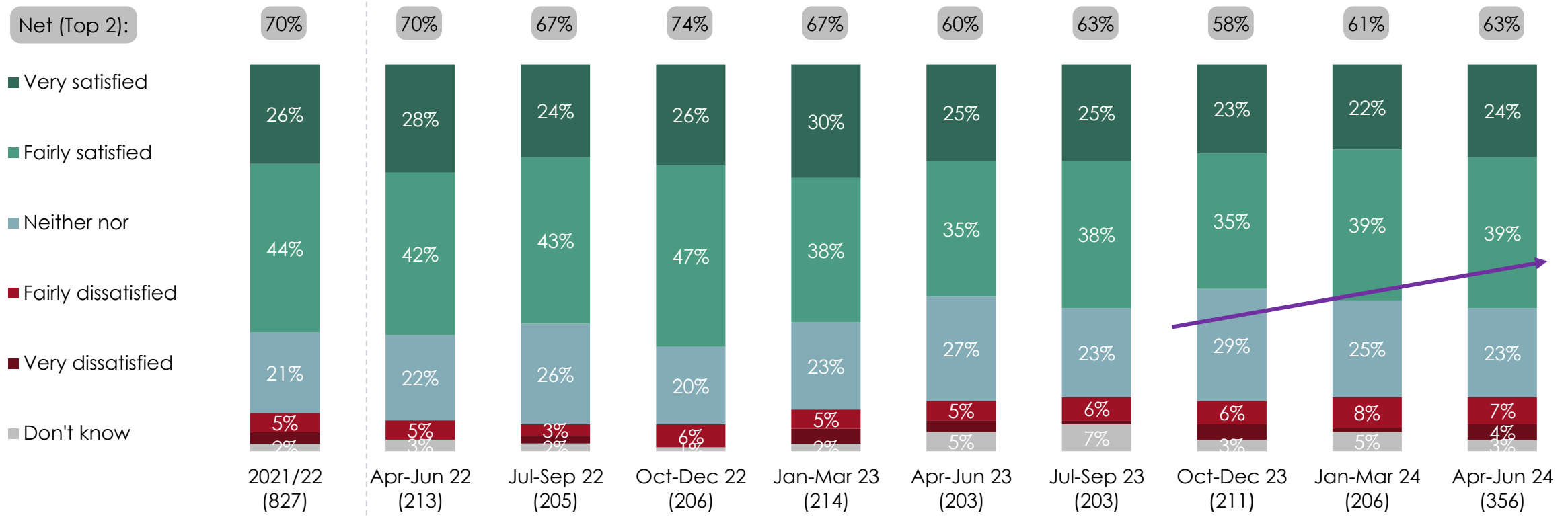


Overall value for money

Satisfaction for value for money rises for a second (albeit modest) time since the lowest point in Q3 23/24.



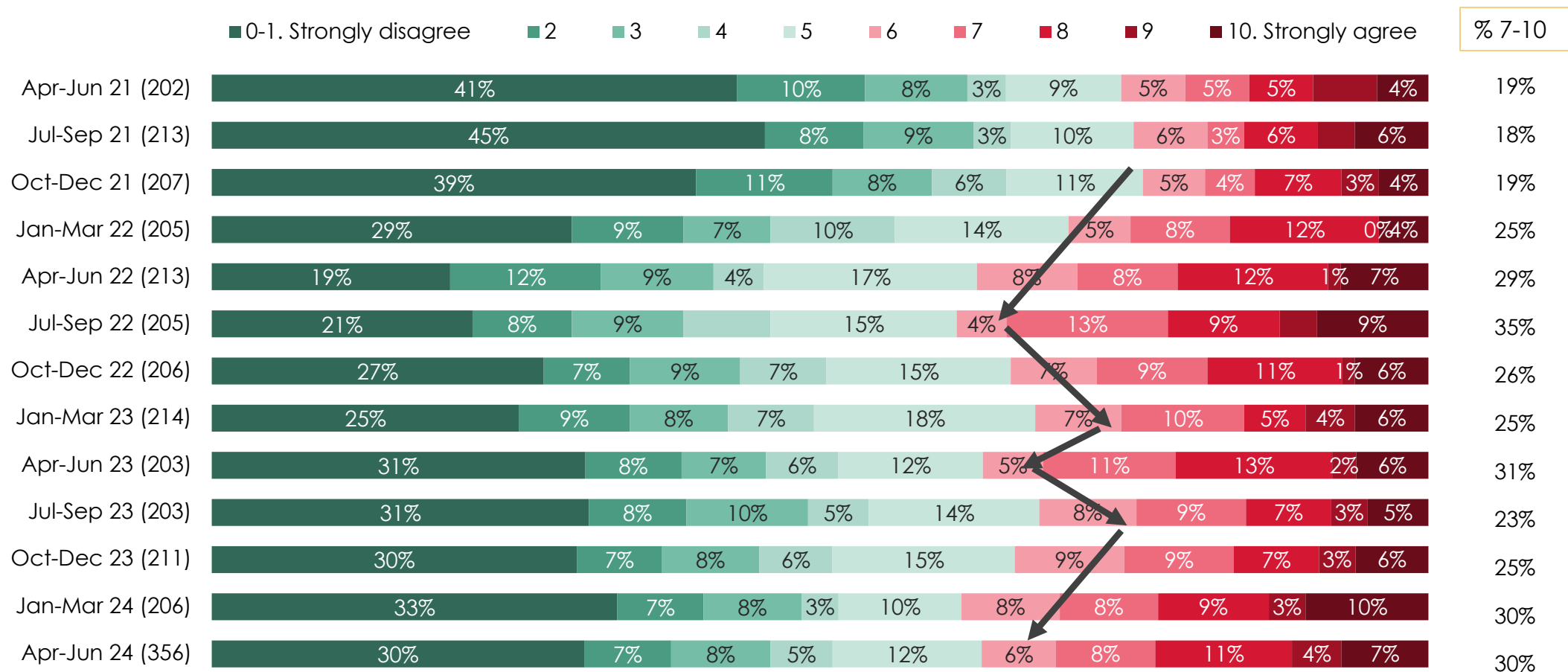
Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? Base: All bill payers



Concern about water bill affordability holds steady amongst bill payers with 3 in 10 feeling anxious about being able to afford their water bills, perhaps due to the media coverage regarding potential water bill increases in the future.

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

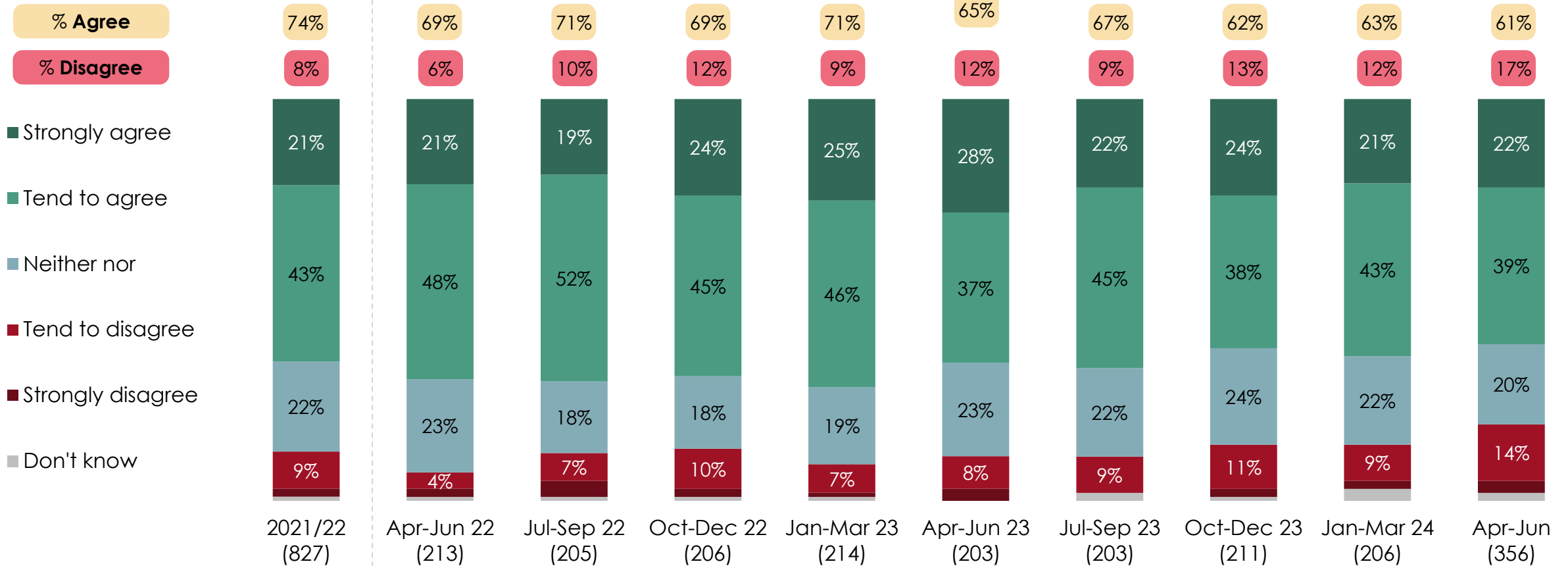
I worry about being able to afford my water bill



A greater proportion of bill payers actively disagree that the water/sewerage charges are affordable – this is the highest level of disagreement since 2021/2022.



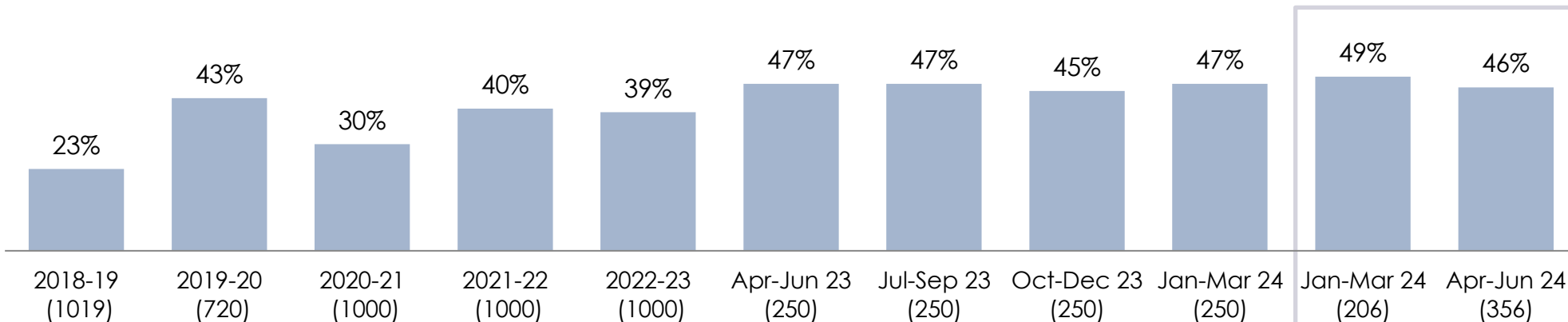
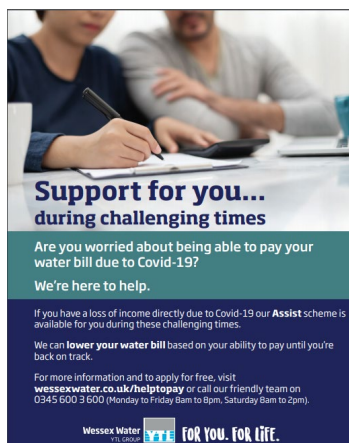
Q17. How much do you agree or disagree: “The total water and sewerage charges that you pay are affordable to you”? Base: All bill payers



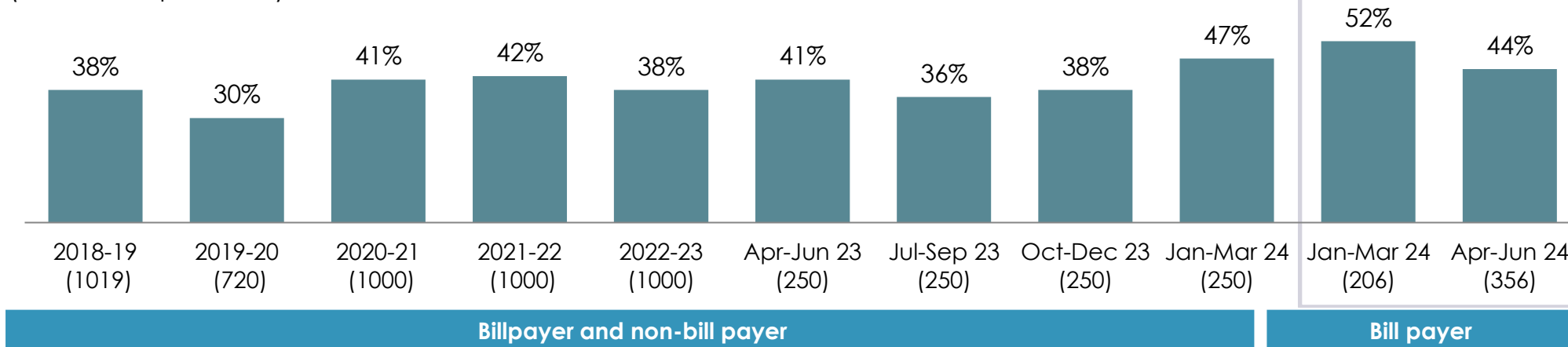
Awareness of Assistance Measures

Awareness of financial assistance holds steady amongst bill payers, however levels of awareness for PSR services has declined in the latest Quarter.

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



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

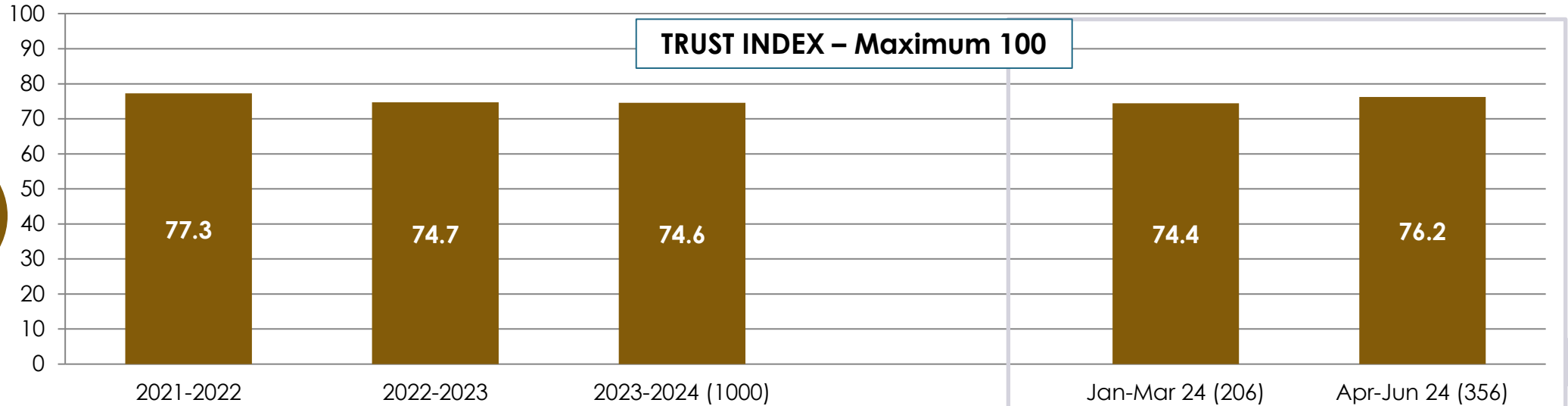




The current tracking study incorporates several image and performance measures that are known to drive trust based on components of trust from ICS and Edelman. The new 'Trust Index' is made up of **6 dimensions**

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 has continuously risen since Q1 23/24. The increases in the latest Quarter are largely driven by Customer Ethos and Trust (which were the areas that saw the most decline in Q1 23/24).



Components – Mean scores

Component	2021-2022	2022-2023	2023-2024 (1000)
Reliability and dependability	8.20	8.05	8.18
Competence and capability	7.68	7.39	7.23
Customer ethos	7.64	7.40	7.34
Transparency	7.78	7.62	7.73
Ethics	7.44	7.16	6.93
Brand validation	7.42	6.98	6.97

Billpayer and non-bill payer

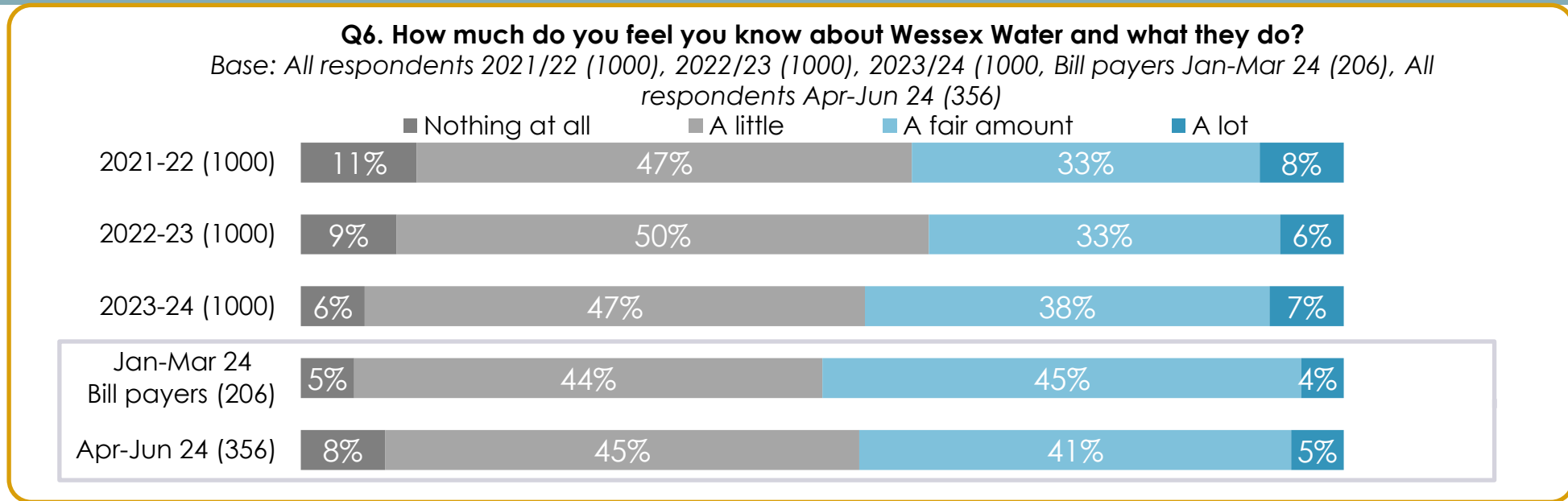
Component	Jan-Mar 24 (206)	Apr-Jun 24 (356)
Reliability and dependability	8.20	8.30
Competence and capability	7.21	7.44
Customer ethos	7.36	7.63
Transparency	7.73	7.73
Ethics	6.76	7.08
Brand validation	6.93	7.06

Bill payer

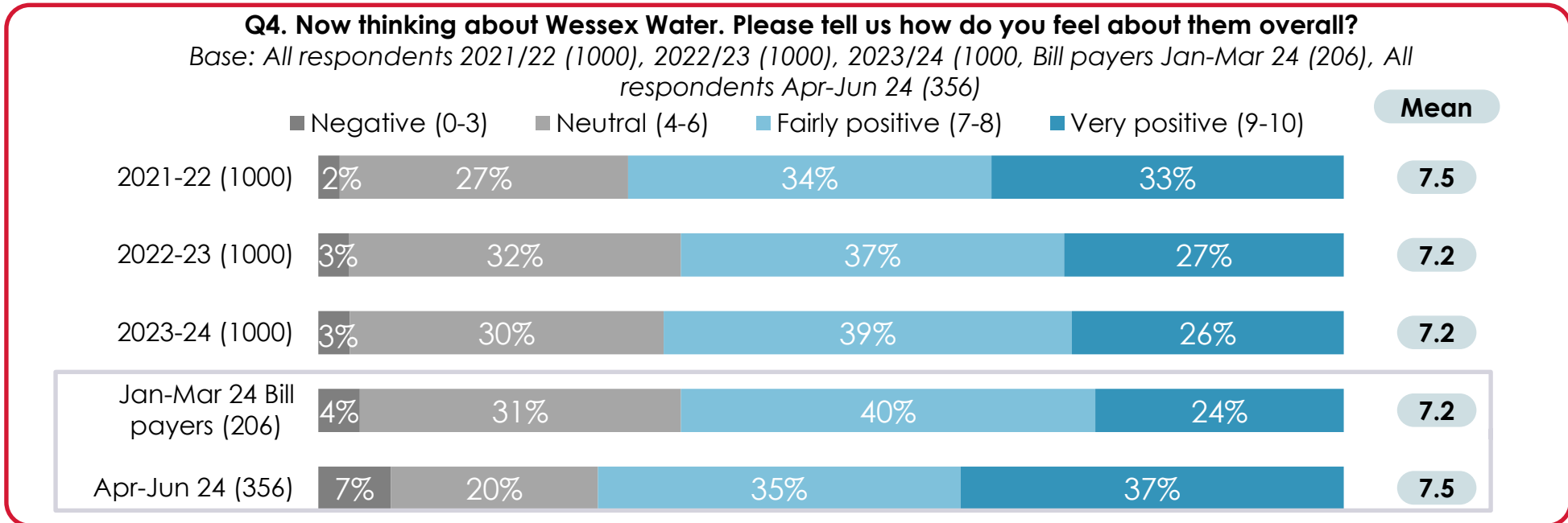
Knowledge and sentiment



Levels of claimed knowledge about Wessex Water remains relatively steady versus the previous Quarter.



A greater proportion of customers feel positive about Wessex Water– with significantly more saying they feel ‘very positive’ about the company



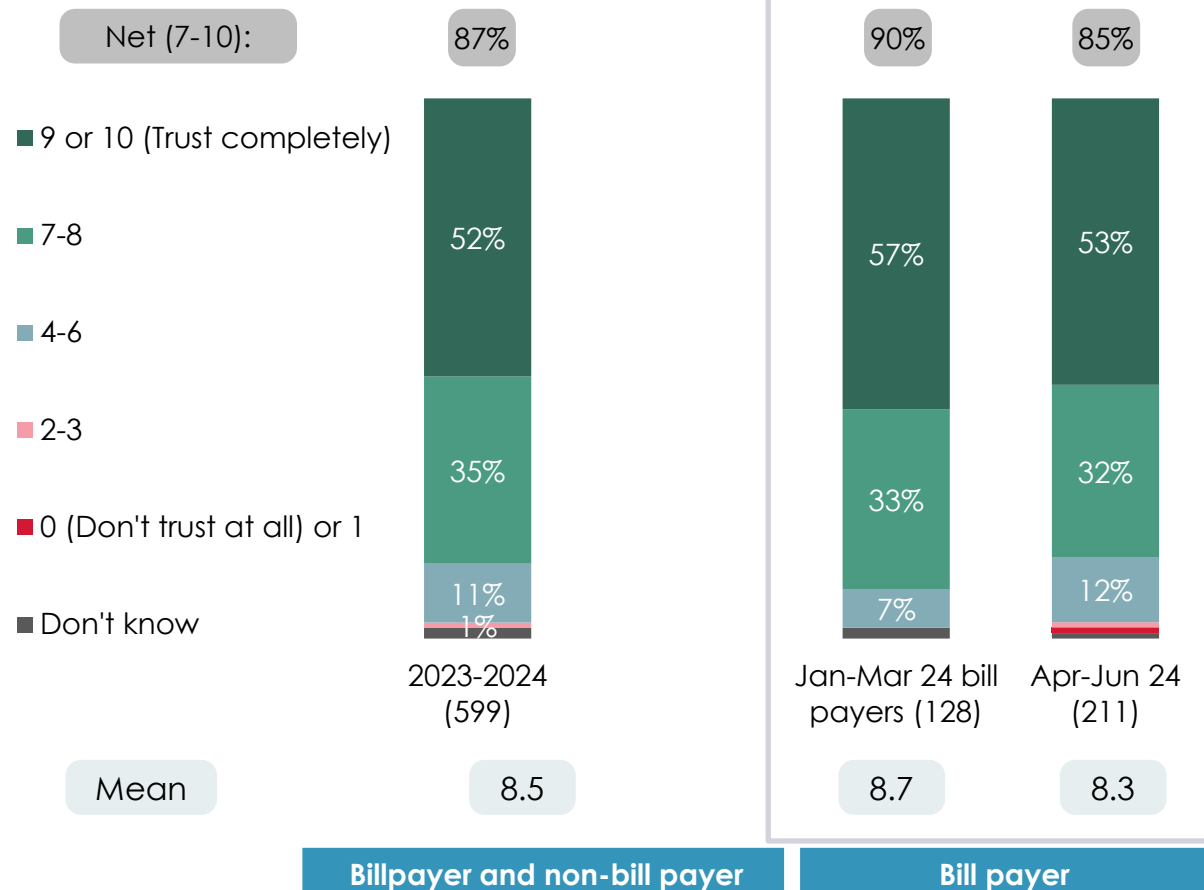
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)

Trust in both water and wastewater/sewage disposal has dropped back from the peak achieved in the previous Quarter.



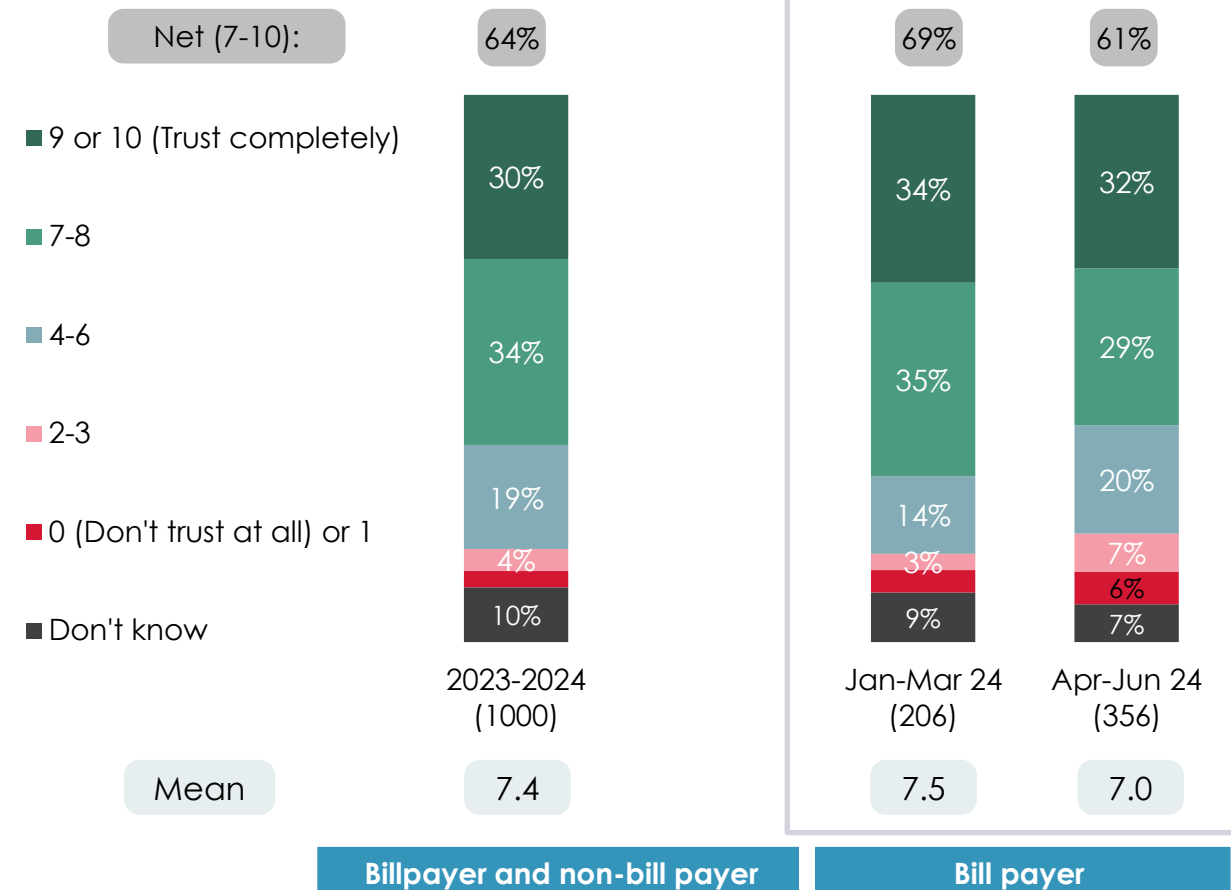
QT1 How much do you trust Wessex Water to provide a reliable supply of good quality tap water?

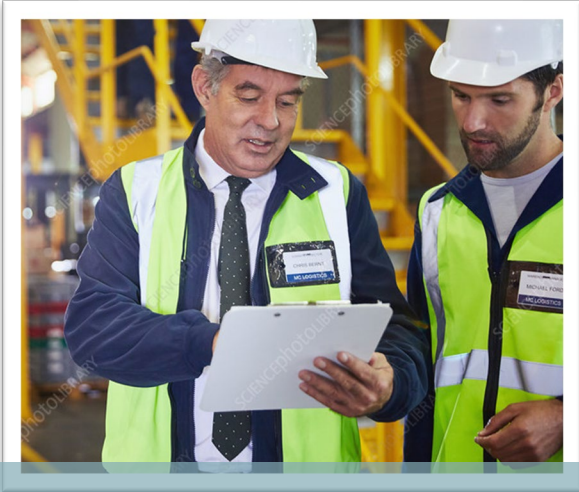
Base: All respondents in supply area



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

Base: All respondents





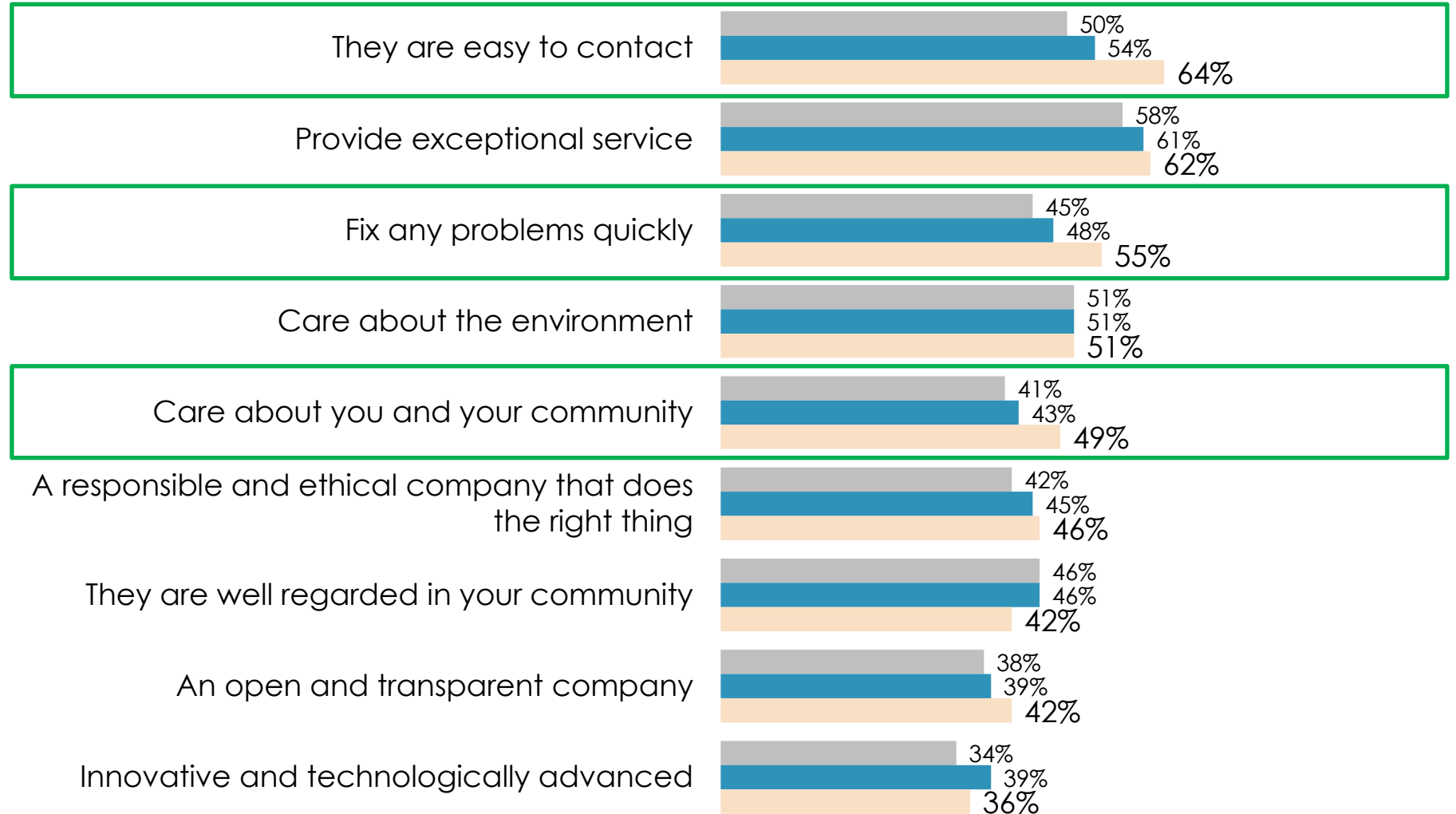
Brand health and image



There is a rise in the proportion who agree that Wessex Water is a company that cares about customers and the community. Performance for being ‘easy to contact’ and ‘fix problems quickly’ have also risen amongst bill payers.

However, these scores may partially be influenced by the increased proportion of online respondents, who might be more accustomed to managing their water company admin online.

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’).



■ 2023/24 Total (1000) ■ Jan-Mar 24 billpayers (206) ■ Apr-Jun 24 bill payers (356)

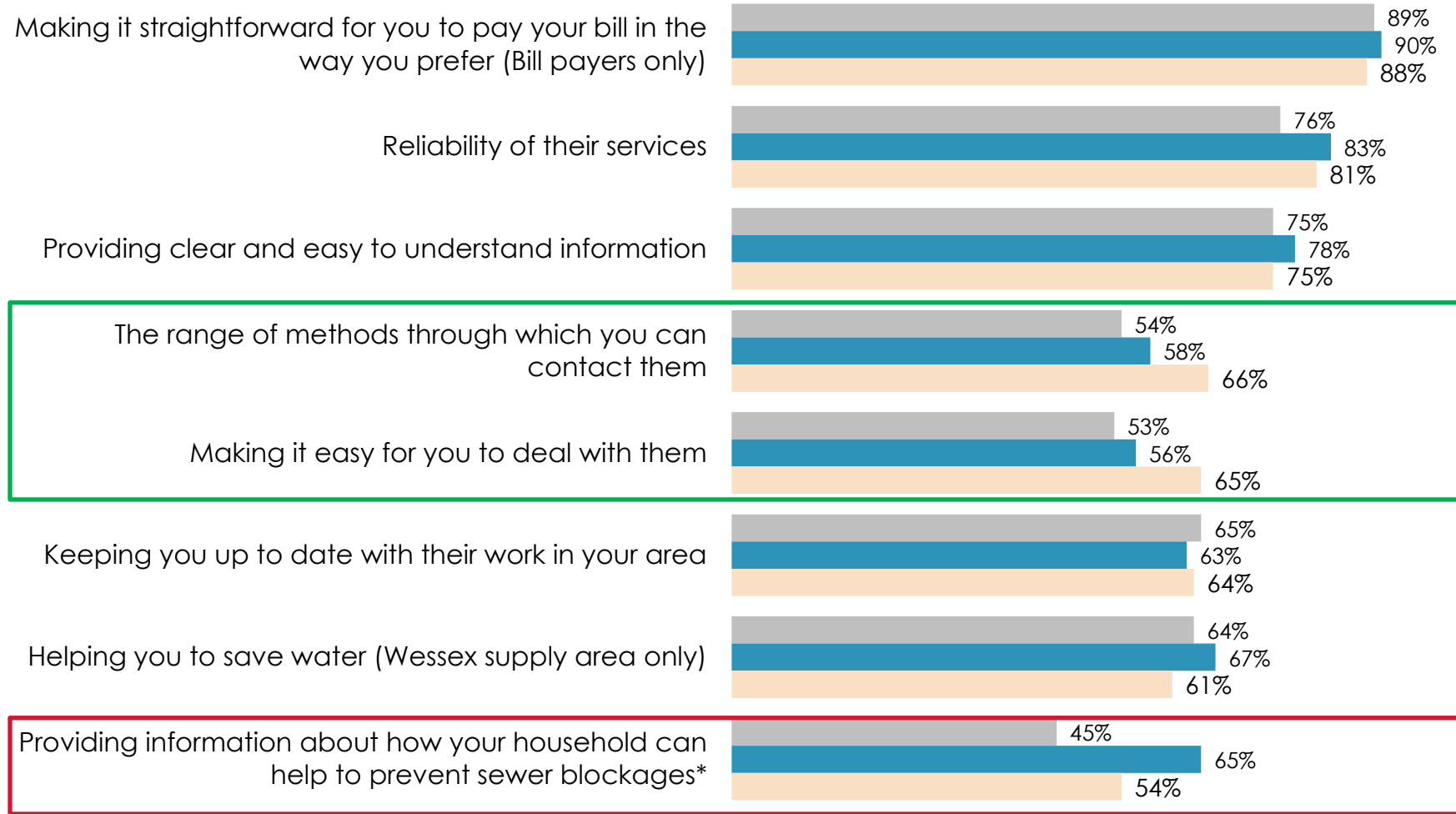
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)



More bill payers perceive Wessex Water as being easy to contact and deal with them than the previous quarter (although may partially be due to the greater proportion of online respondents this wave).

However, fewer (bill paying) customers appear to have noticed information about how they can prevent sewer blockages in their households.

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



■ 2023/24 Total (1000) ■ Jan-Mar 24 billpayers 24 (206) ■ Apr-Jun 24 billpayers 24 (356)

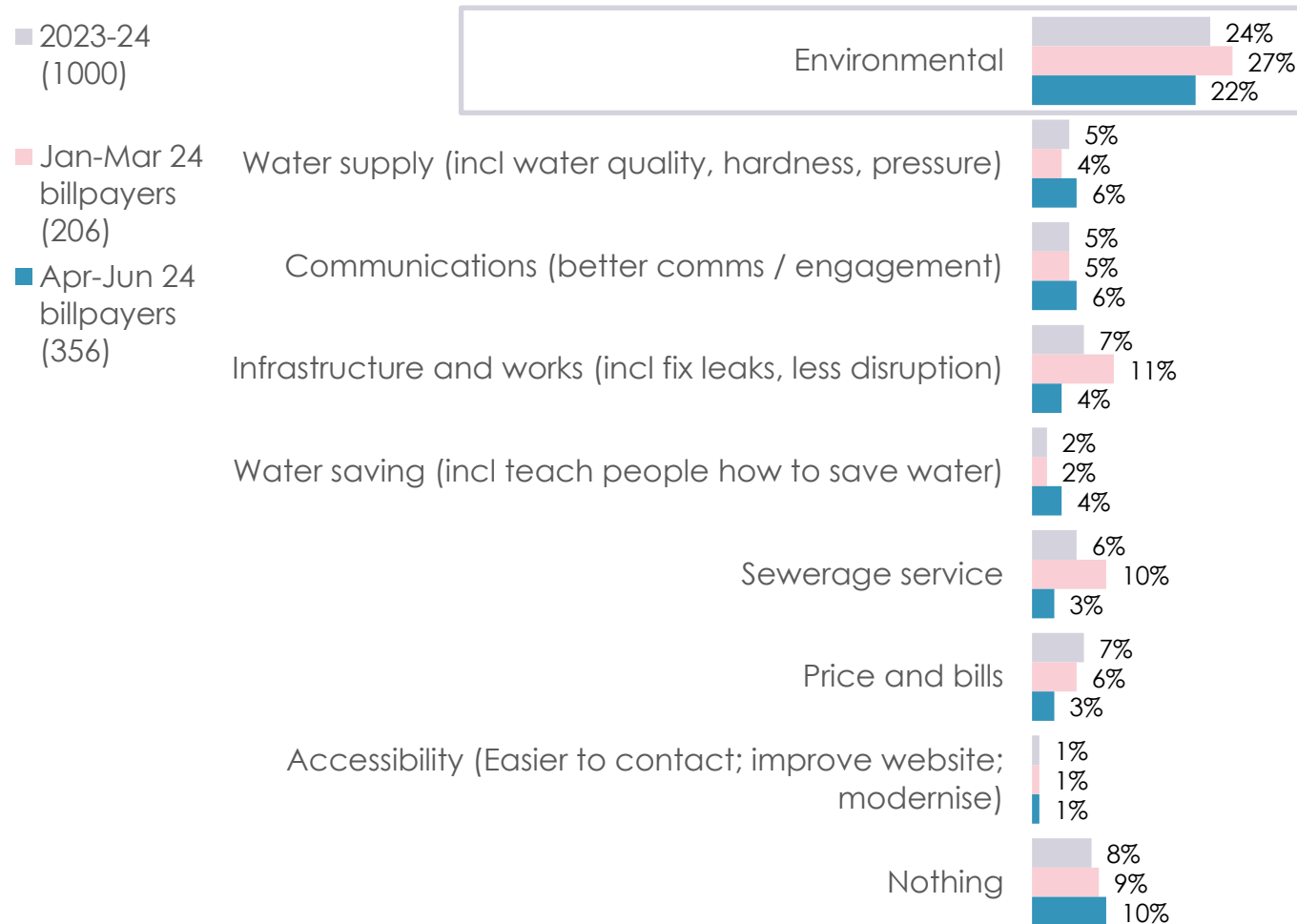
*Question wording changed in Q3 2023-24 from "Helping you prevent sewage blockages in your household"
New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)

Looking ahead, what can be improved?

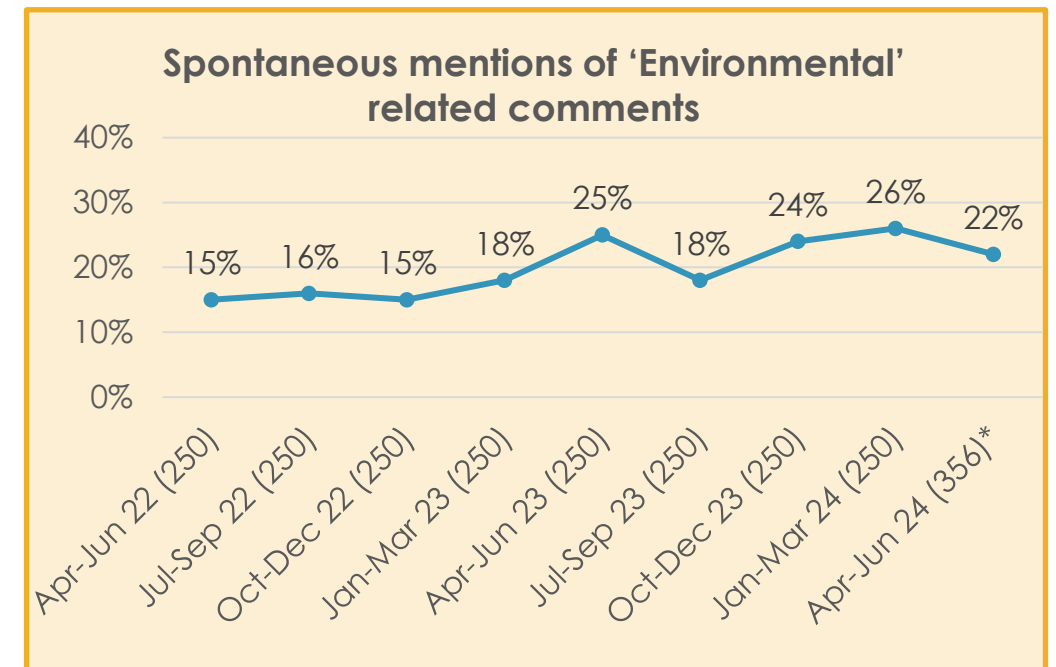
In line with the ranked priorities, spontaneous mentions of what could be improved are mostly related to the environment and ensuring good quality water. Infrastructure and sewerage services are less mentioned topics Q1 24/25.

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



Should be no sewage in rivers/sea	13%
Be more environmentally friendly	2%
Should be less sewage in rivers/sea	2%
Other environmental related mentions	5%



Recall of touchpoints

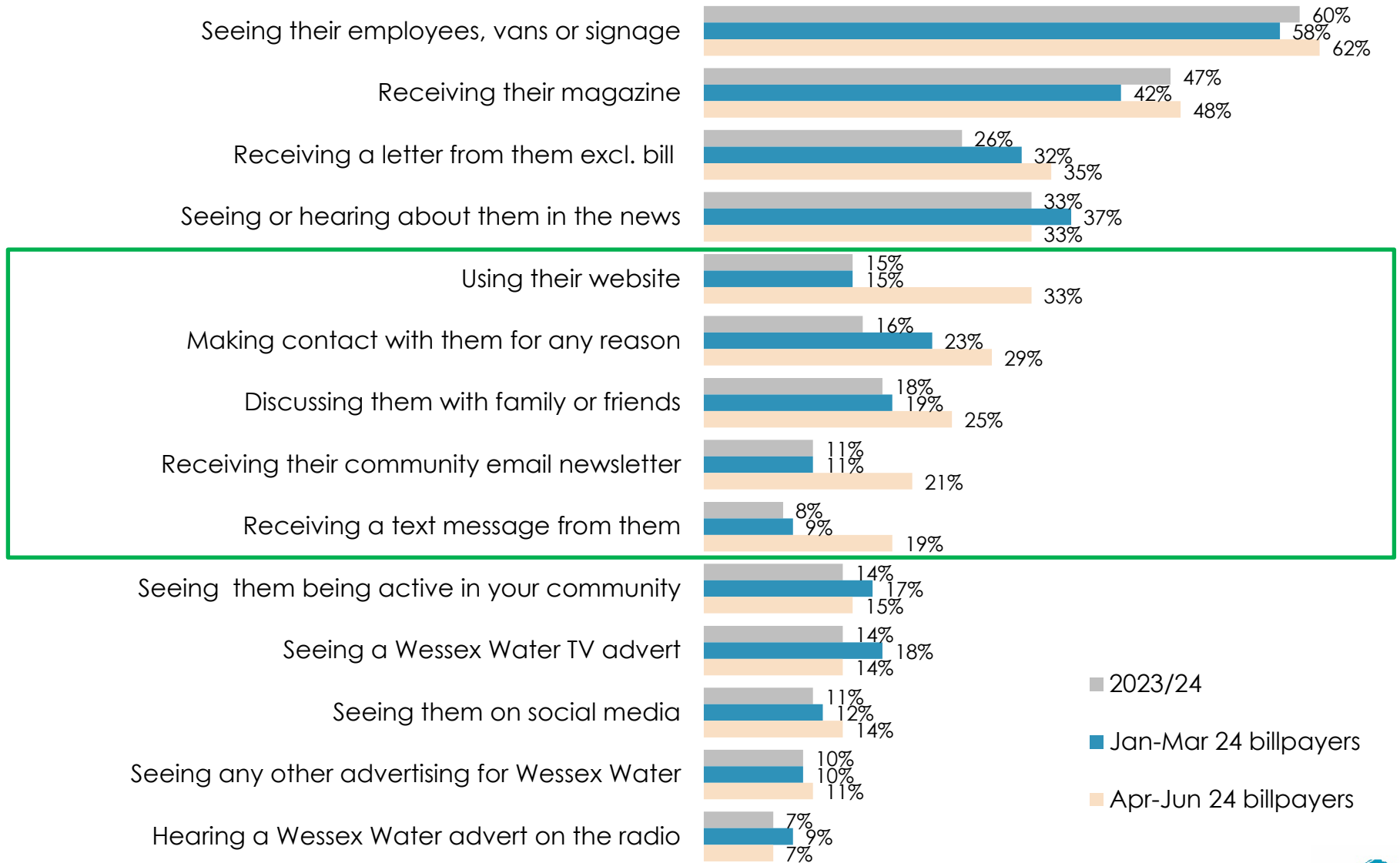


More (bill payers) recall using the website or contacting Wessex Water for any reason, as well as remember receiving Wessex Water's community newsletters – however this shift may be partially due to the influx of online respondents (who perhaps are more comfortable using Wessex Water's website).

There is also an uplift in those recalling a text message from Wessex Water and being a topic of conversation.

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

Base: All respondents 2023/24 (1000), Jan-Mar 24 bill payers (206) Apr-Jun 24 bill payers(356)



New methodology: Customer sample used from Q1 2024-2025 (excludes non-bill payers)



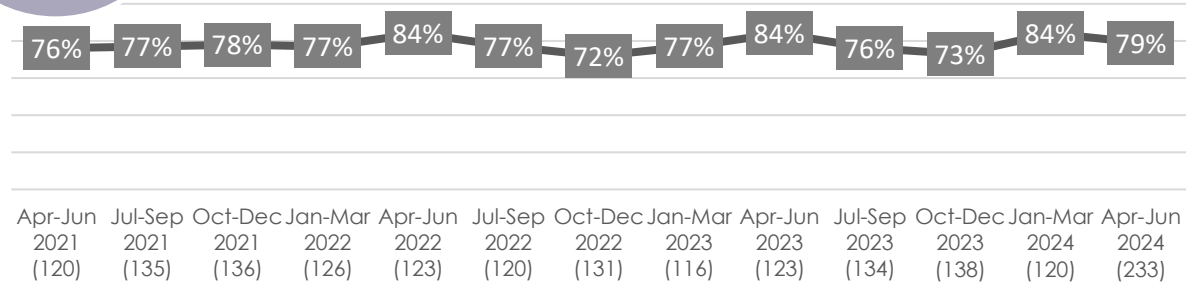
Water use behaviours

Attitudes to water use and metering

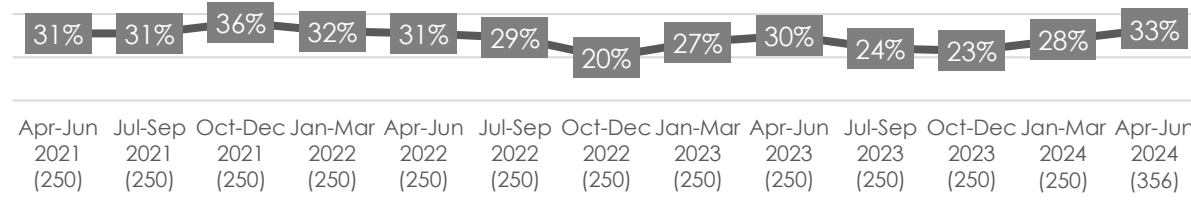
Attitudes towards water use and water saving hold steady. There is an uplift in interest in smart meter benefits in the latest Quarter, close to the scores in Q1 last year (perhaps coinciding with new water rates?)



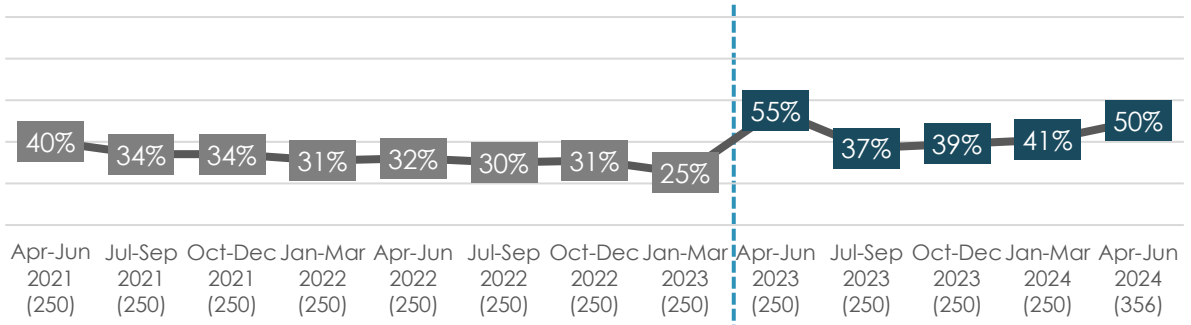
QF1. And how much would you agree or disagree with ...? % rating 7-10 (10 = 'strongly agree'). Base: All respondents



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

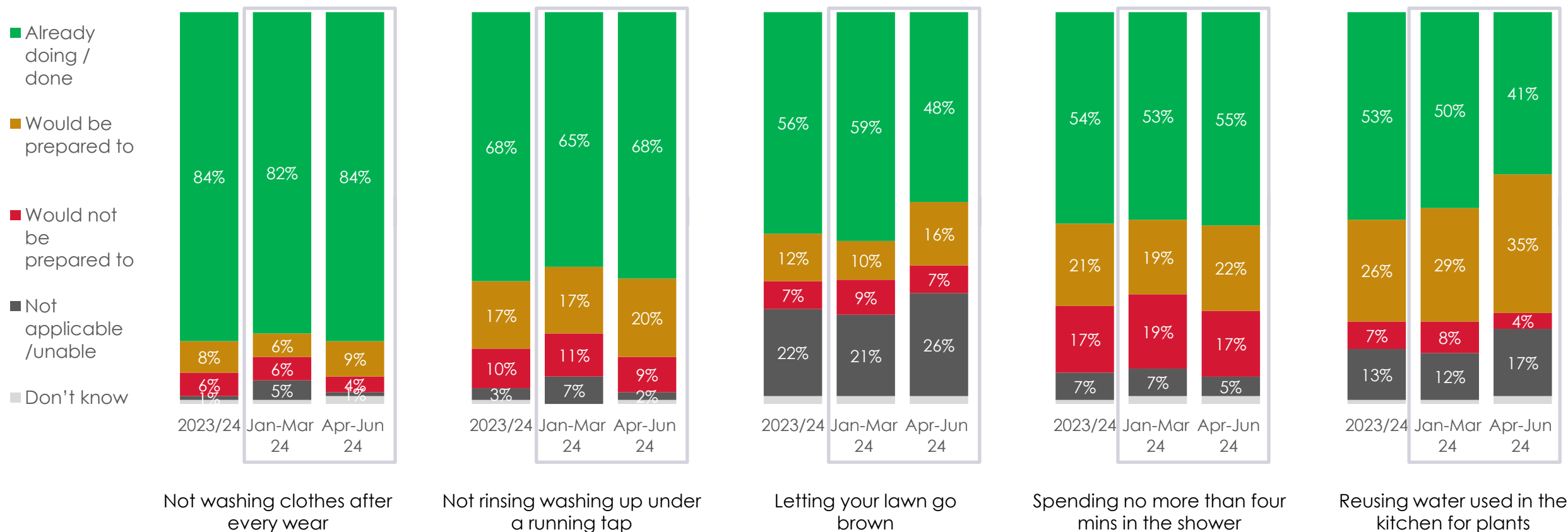
I'd be interested in having more frequent updates on how much water I'm using and how much it is costing**

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

Water use behaviours

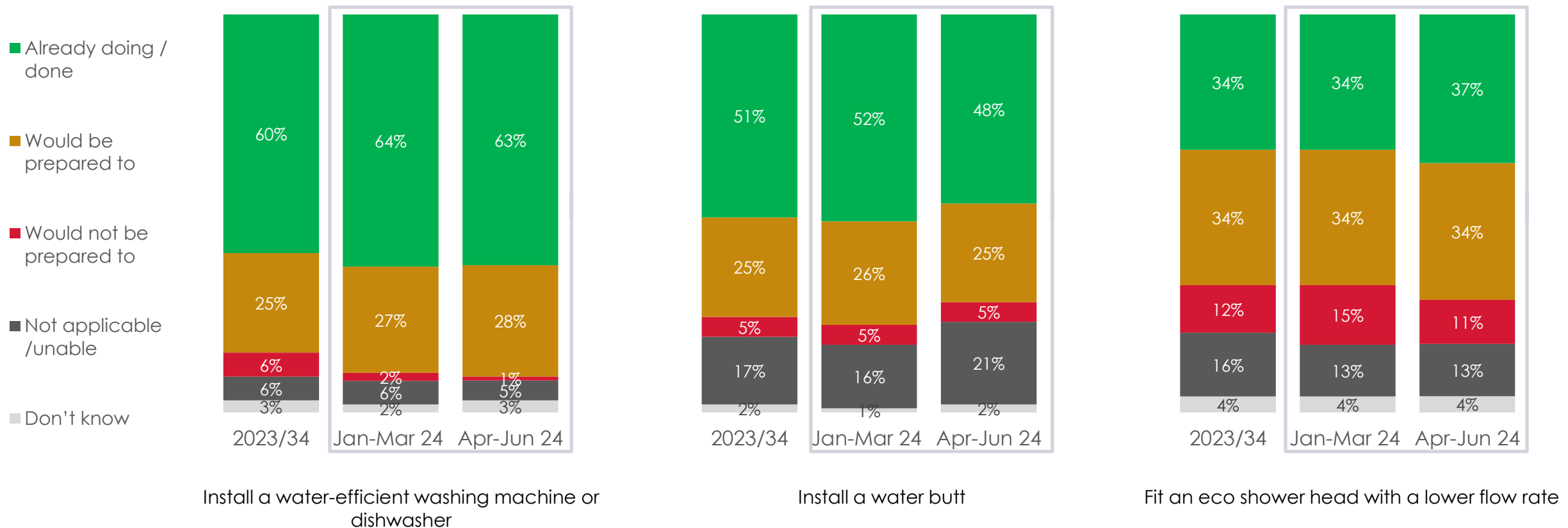
Customer water usage behaviours generally holds steady, though there is less engagement with behaviours regarding plants and lawn, but these are potentially subject to living arrangements.

QF2c/d. Please tell us which of these you are already doing / have already done, and which others, if any, you would be prepared to do, to reduce your use of water? Base: All respondents 2023/24 (1000), Bill payers Jan-Mar 2024 bill payers (206), All respondents Apr-Jun 2024 bill payers (356)



Consideration/installing of a water efficient washing machine holds steady, while propensity/usage of eco-shower heads sees a marginal increase. There is a minor decline in those saying they already have a water butt, again potentially due to living arrangements.

QF2c/d. Please tell us which of these you are already doing / have already done, and which others, if any, you would be prepared to do, to reduce your use of water? Base: All respondent 2023/24 (1000), Bill payers Jan-Mar 2024 (206), All respondents Apr-Jun 2024 (356)

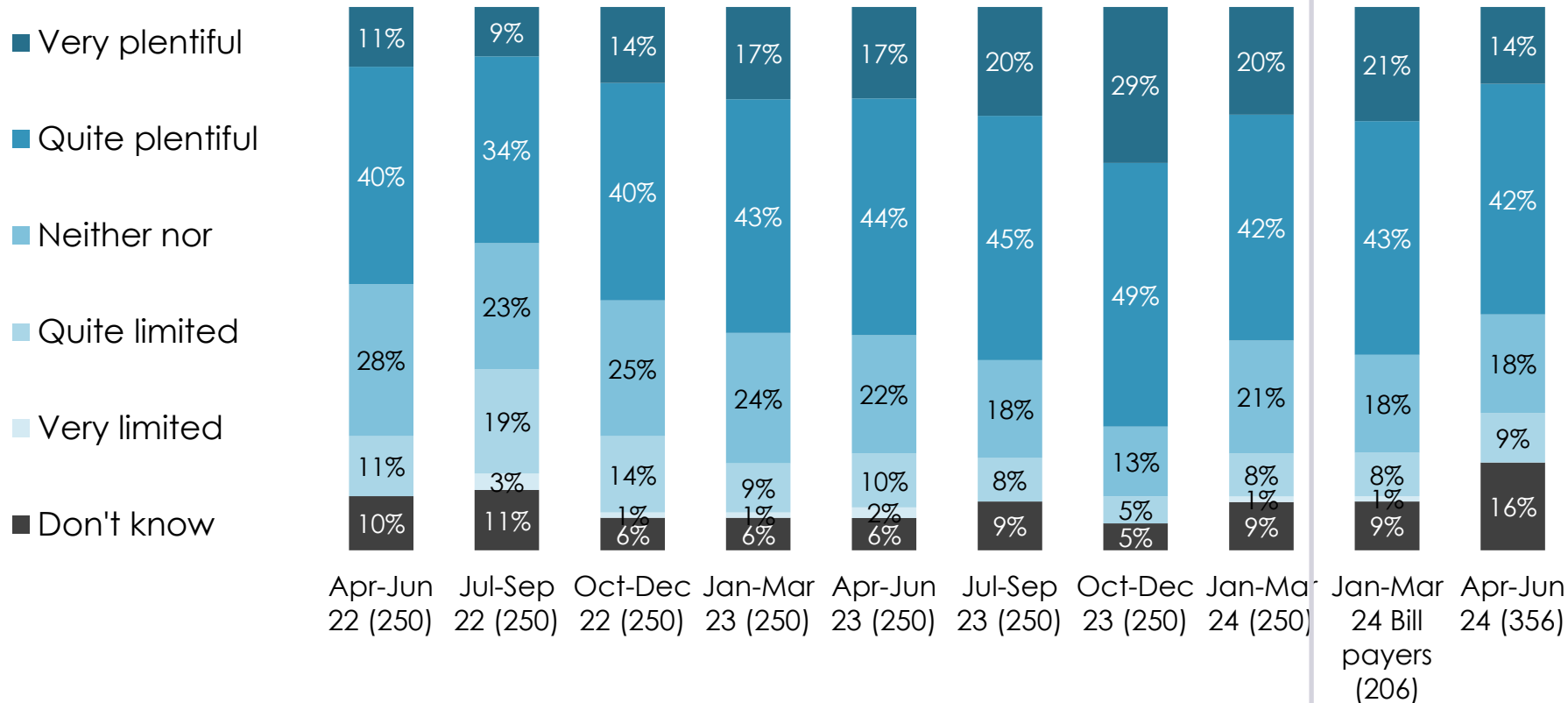


Impressions of water resources in region

About 1 in 7 Wessex Water (bill payers) are unsure about the level of water supplies in their region – levels of uncertainty is higher than in previous Quarters.

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





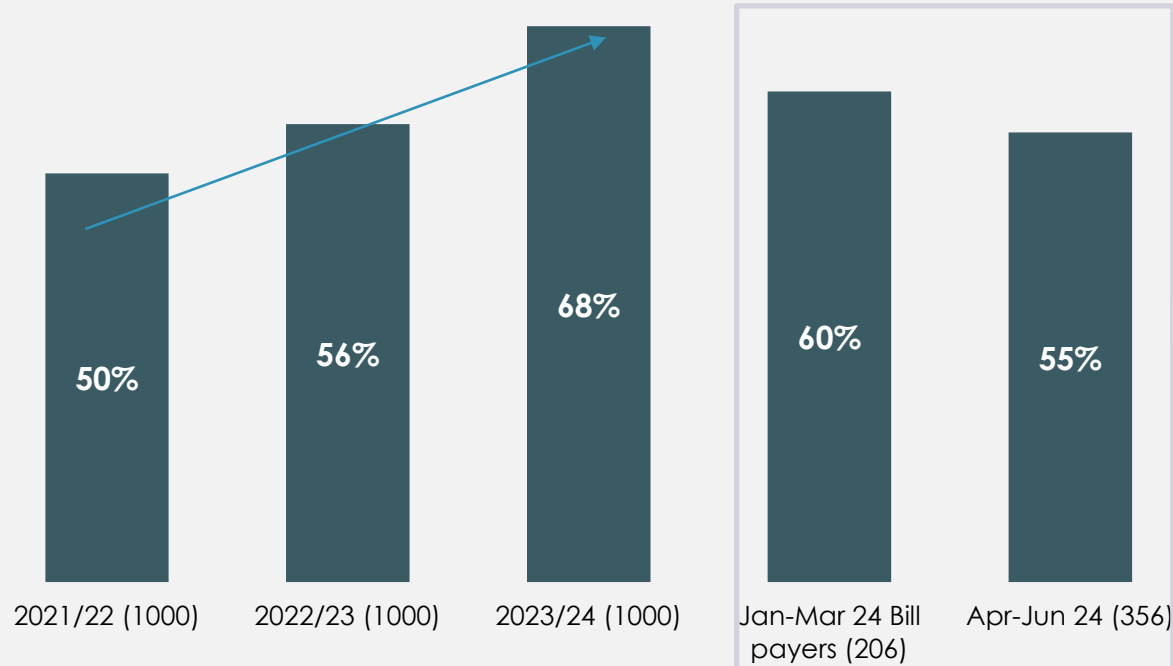
Storm overflows



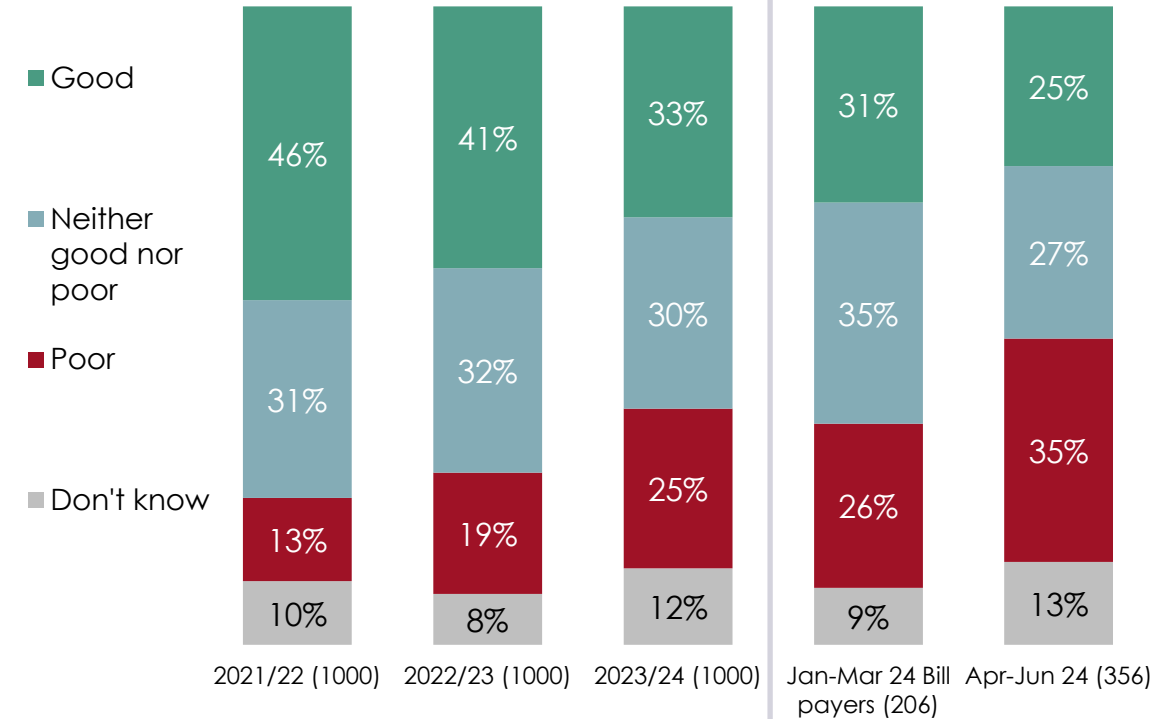
Awareness of storm overflows (CSOs) continues to fall with just over a half saying they have heard anything about releases. However, impressions of water quality continues to decline, with over a third believing the water quality is poor.

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

Base: All respondents



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

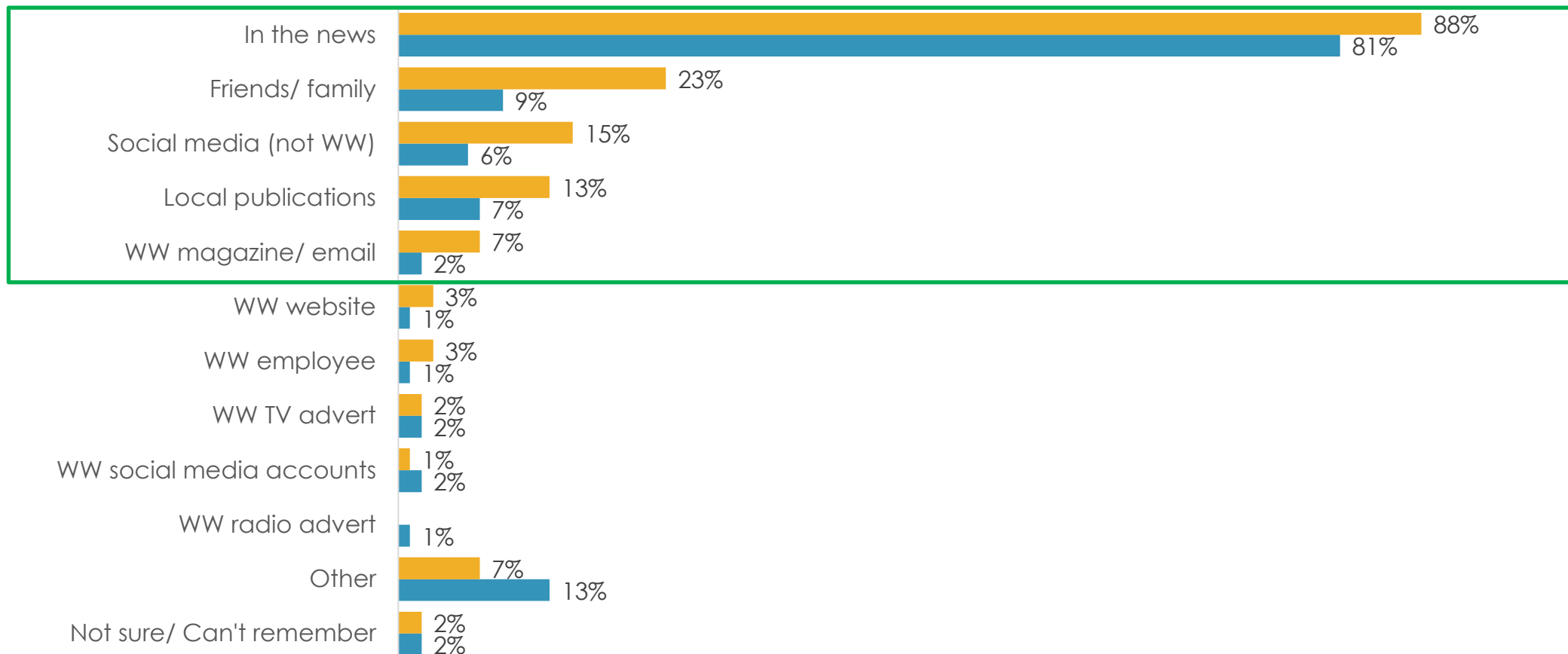


Source of awareness of storm overflows

Those aware of storm overflows are more likely to have heard about the topic from a greater range of sources, however the news remains the top source of information, followed by discussions with friends/family. There is also greater recall of hearing about storm overflows via the Wessex Water comms (email and magazine) in the latest Quarter.

QF1e And where did you hear about this topic?

■ Apr-Jun 24 billpayers (209) ■ Jan-Mar 24 billpayers (121)

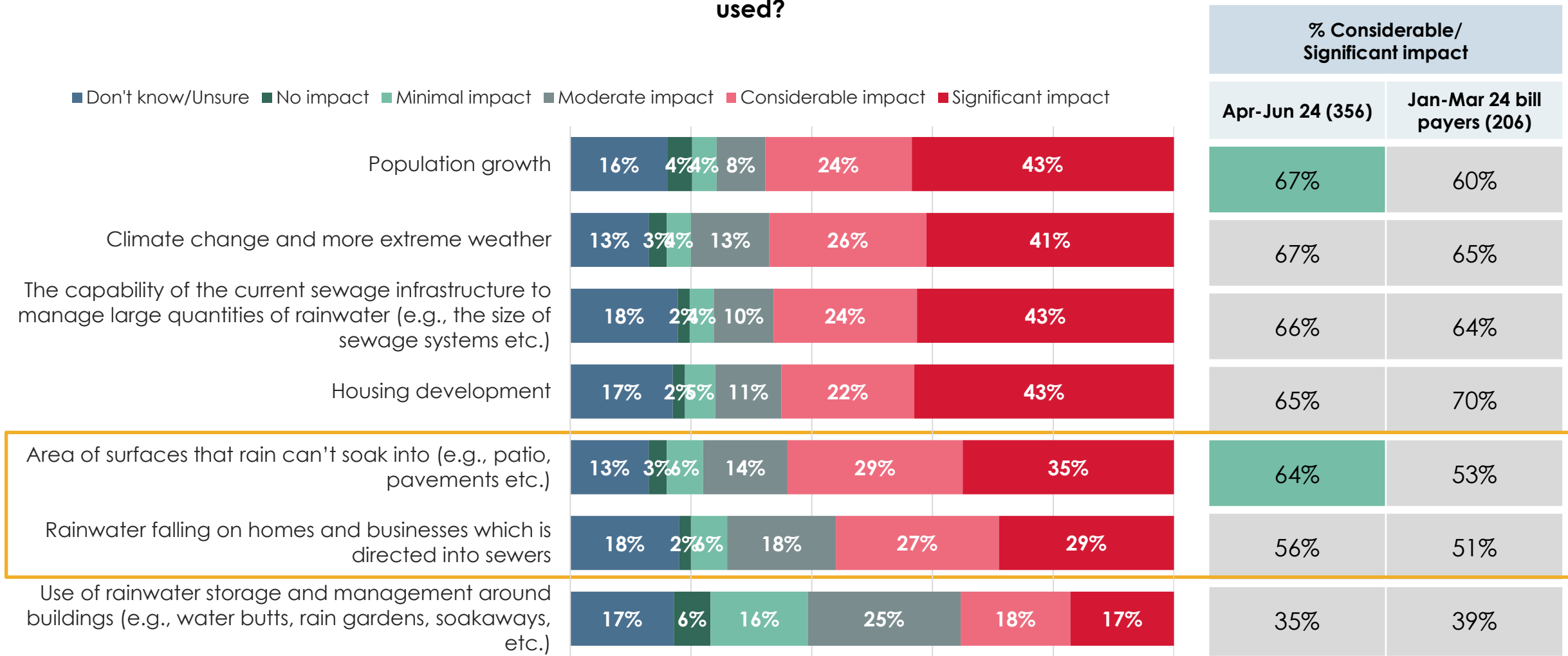


Impact of factors on storm overflow operations

A greater proportion believe that population growth impacts storm overflow use. There is also greater acknowledgement of how surface type and rainwater from buildings can affect storm overflows.

QF1dNEW - What impact, if any, do you think the following factors have on how often storm overflows are used?

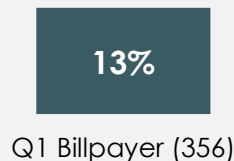
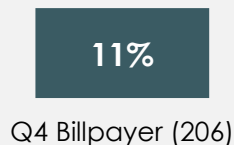
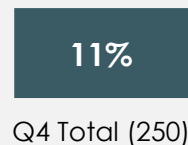
■ Don't know/Unsure ■ No impact ■ Minimal impact ■ Moderate impact ■ Considerable impact ■ Significant impact



Awareness of Wessex Water activity to reduce storm overflows

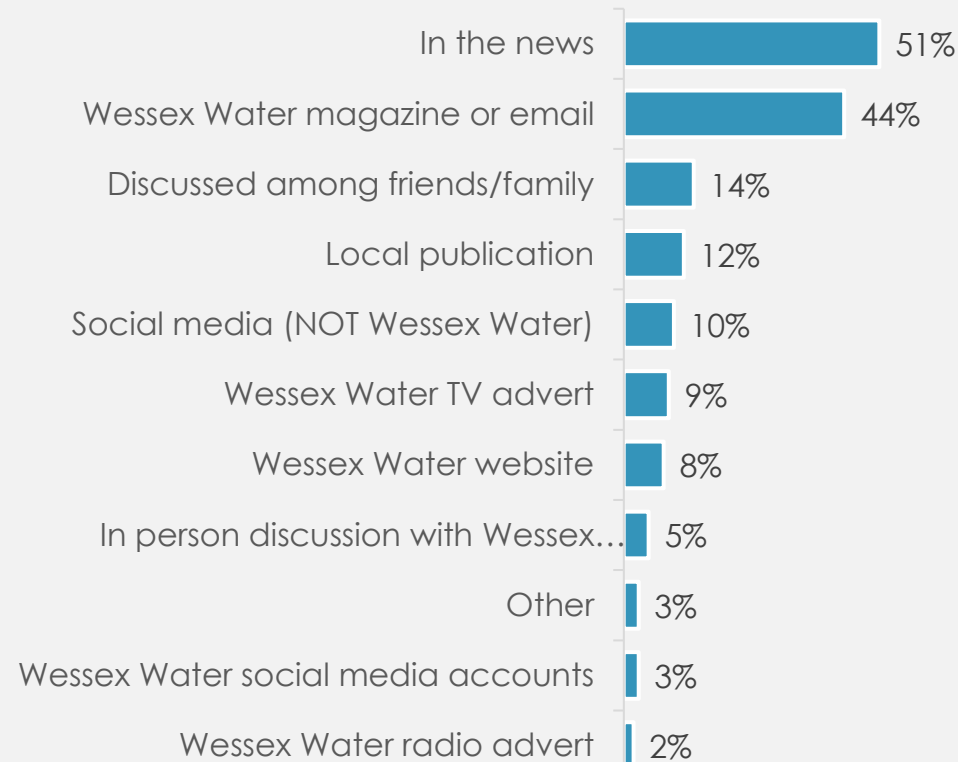
Those aware of Wessex Water’s activity to reduce storm overflows remains steady. The news and Wessex Water’s communications via the magazine and emails are the most recalled sources of information

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



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

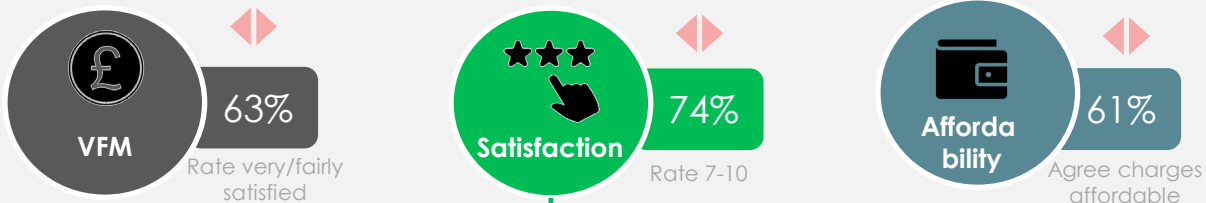
Base: All aware of Wessex Water activity to reduce CSOs (51)



Note: Due to the small sample size, insight should be considered directional

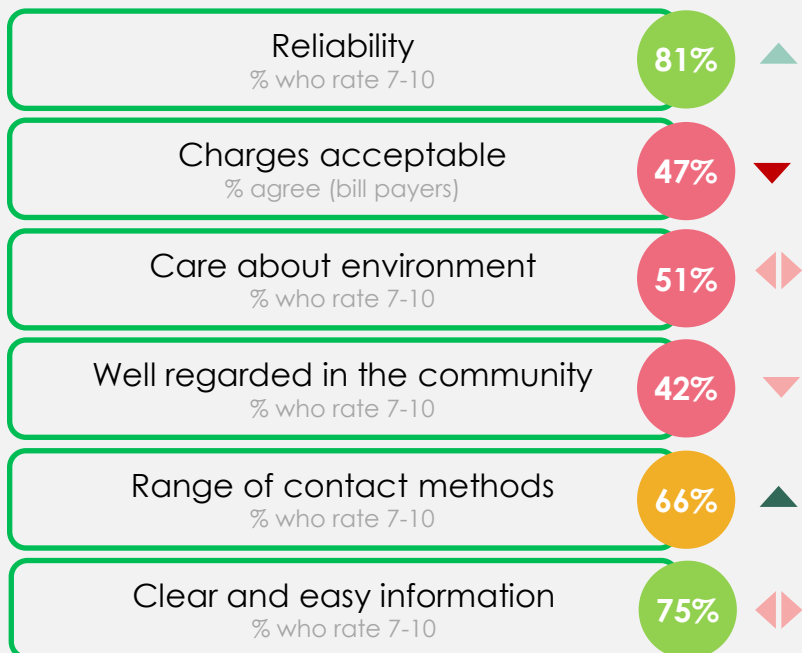
Quarterly Dashboard Update (Apr-Jun 2024 vs. Jan-Mar 2024)

Core performance

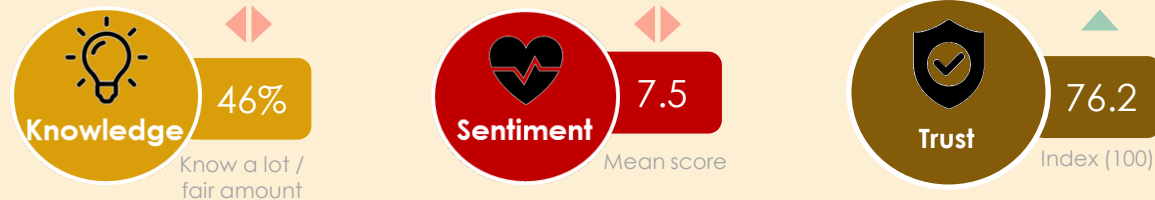


Satisfaction drivers

MOST IMPORTANT

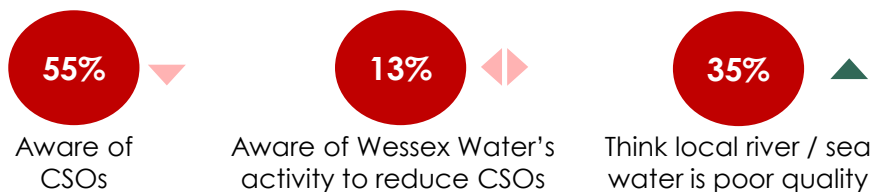


Brand health

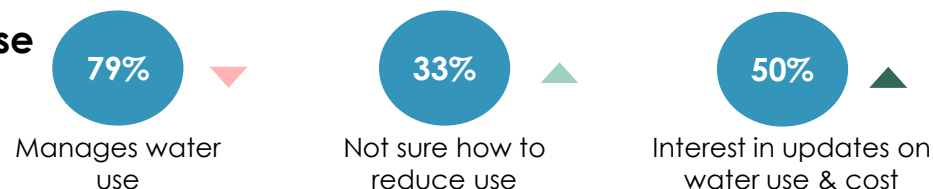


Hot topics

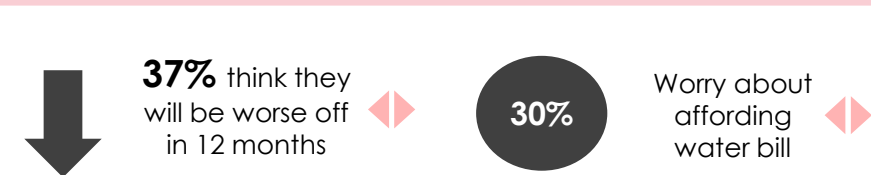
CSOs



Water use



Economic



Key:

- ▲ Significant increase
- ▼ Significant decrease
- ◄ Directional increase
- ◒ Directional decrease
- ◄ No change (less than 3% pt. change)

Changes are Apr-Jun 2024 vs. Jan-Mar 2024

Customer sample used from Q1 2024-2025 (excludes non-bill payers)





Blue Marble Research Ltd

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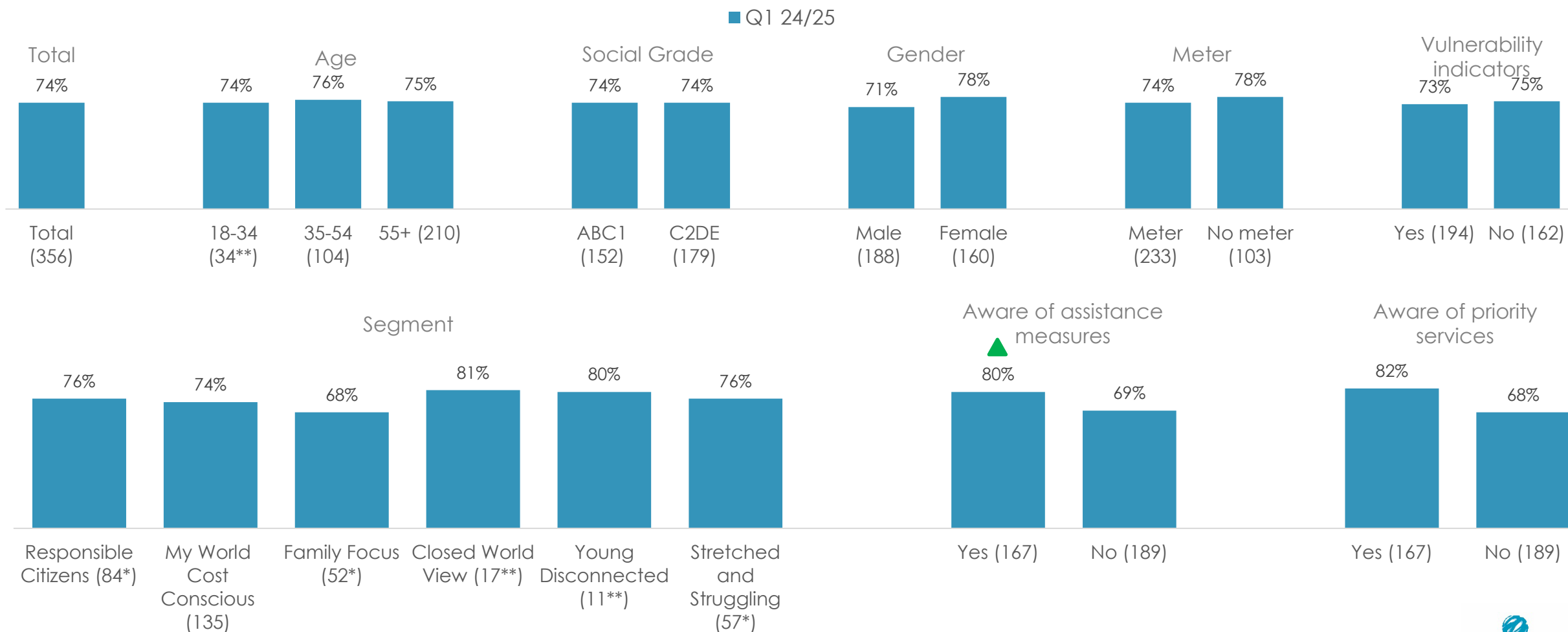
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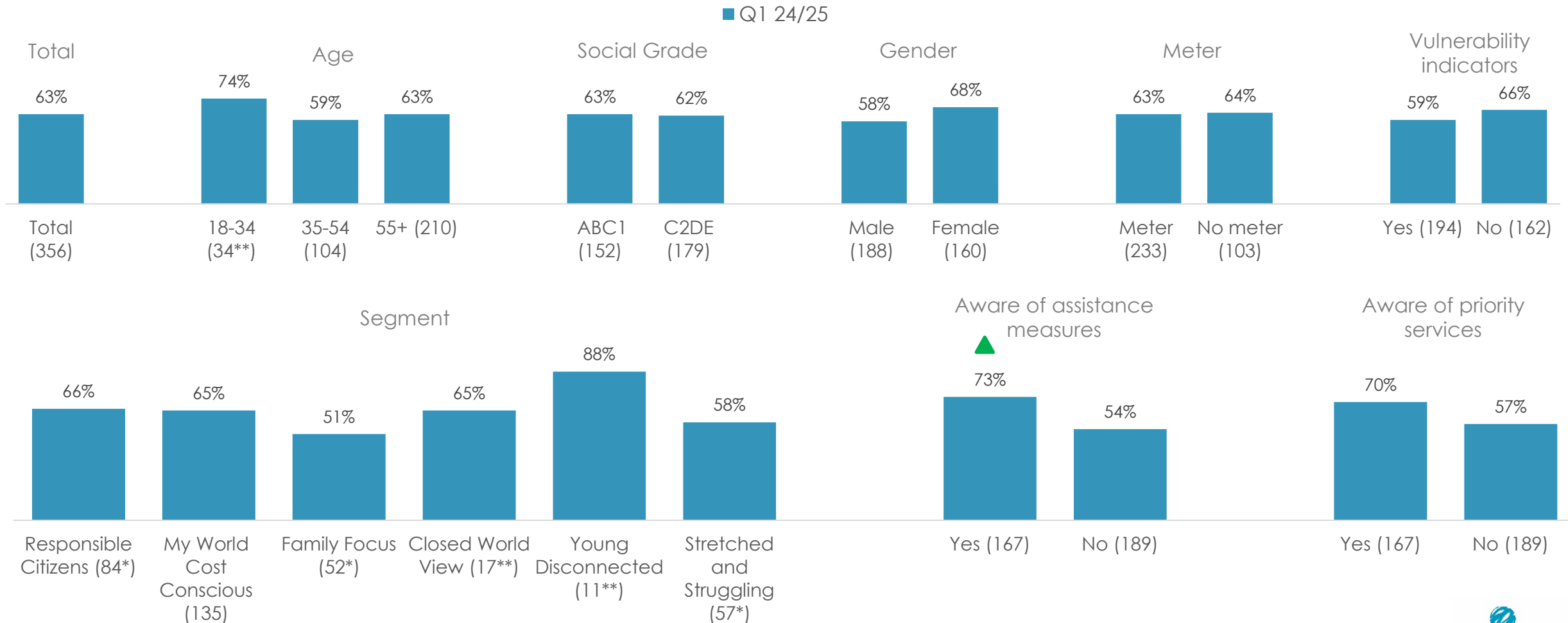
Overall satisfaction with Wessex Water is consistent across the subgroups, but is particularly higher amongst those aware of the additional support that Wessex Water provides for its more vulnerable customers.

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



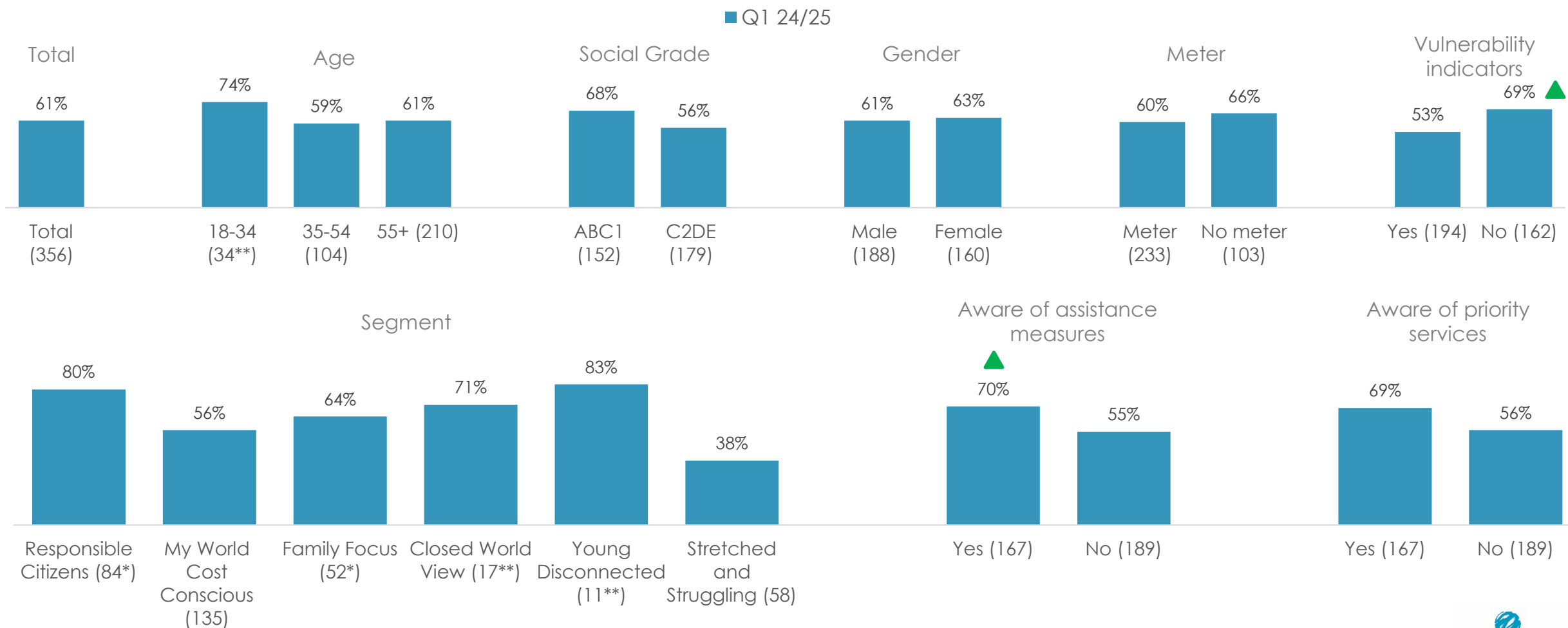
Satisfaction for value for money is relatively similar across the various subgroups, though those aware of financial assistance measures are more likely to be happy with this aspect.

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



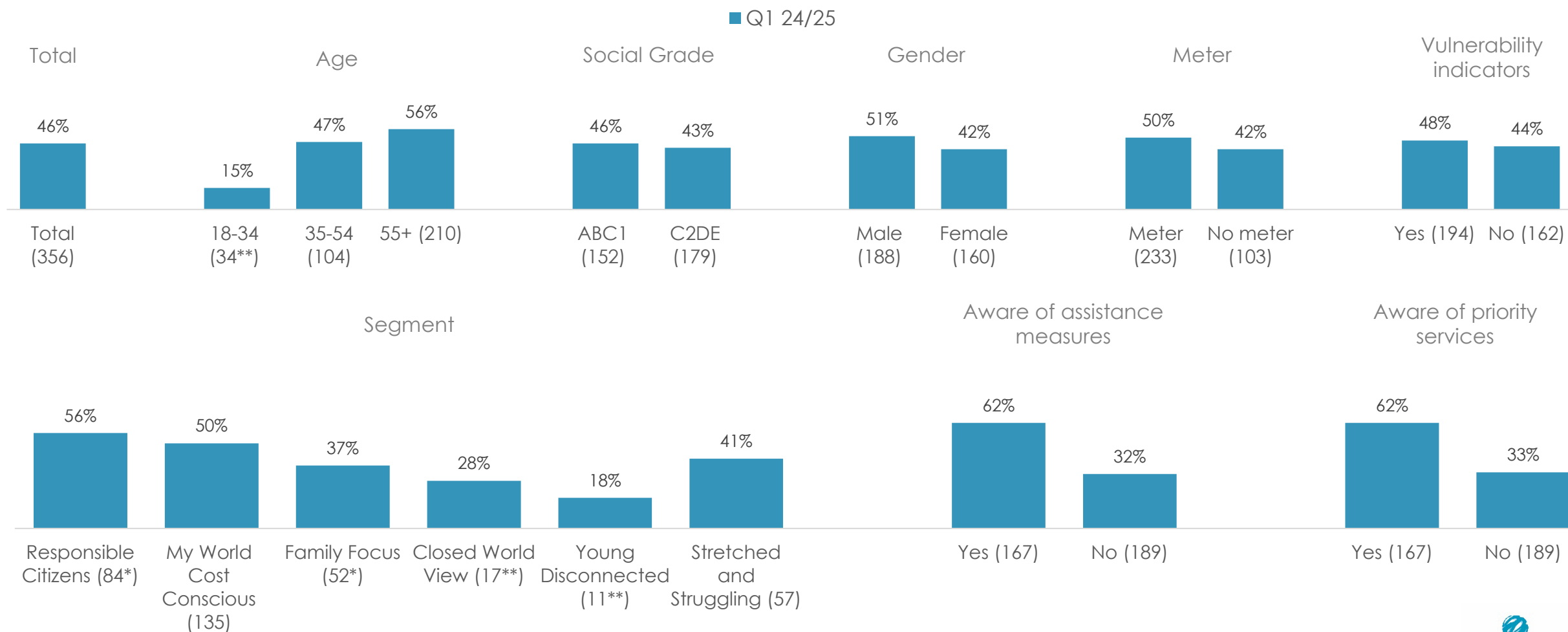
Those in lower social economic background and vulnerable customers are more likely to find that their water bills are affordable. However those aware of financial aid are more likely to find it affordable.

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



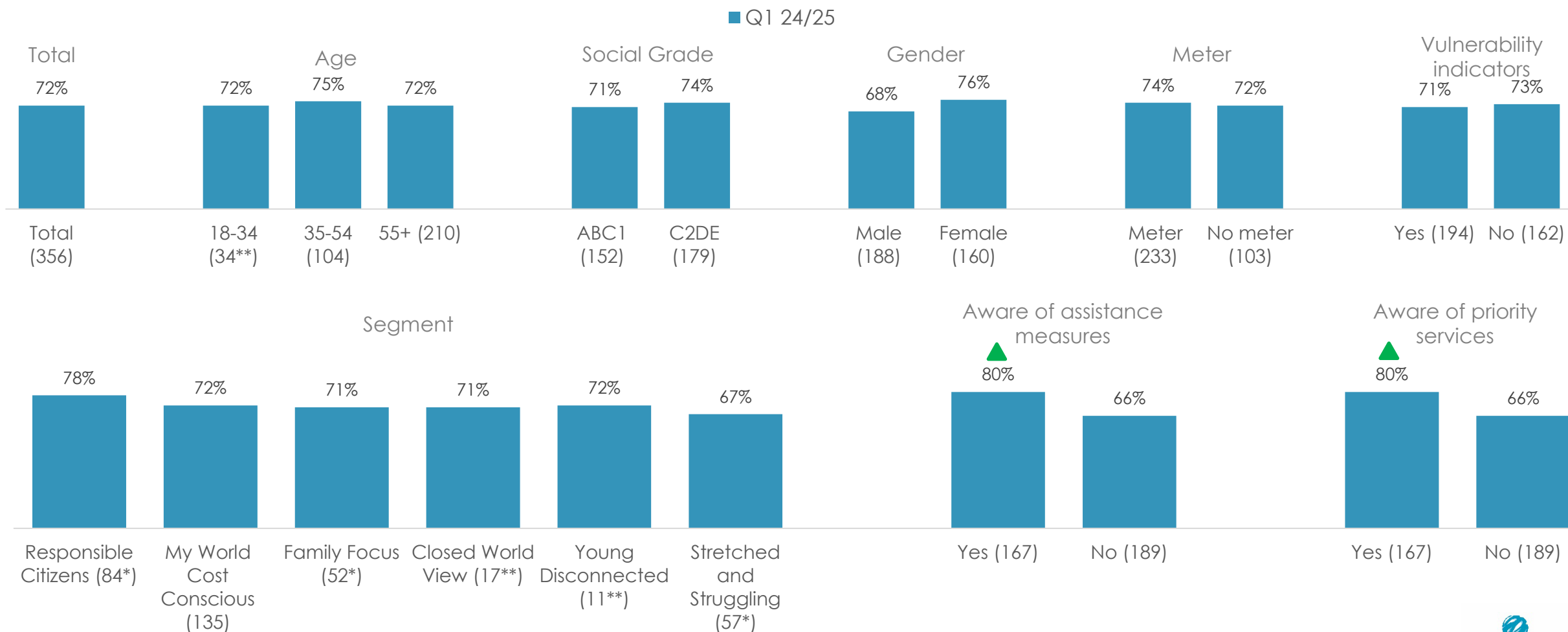
Older customers more likely to claim they are knowledgeable about Wessex Water and their operations.

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



Levels of positive sentiment is similar across subgroups, but those aware of financial aid and priority services are more likely to have a positive opinion of Wessex Water.

Q4. Now thinking about Wessex Water. Please tell how do you feel about them overall? (% Positive)

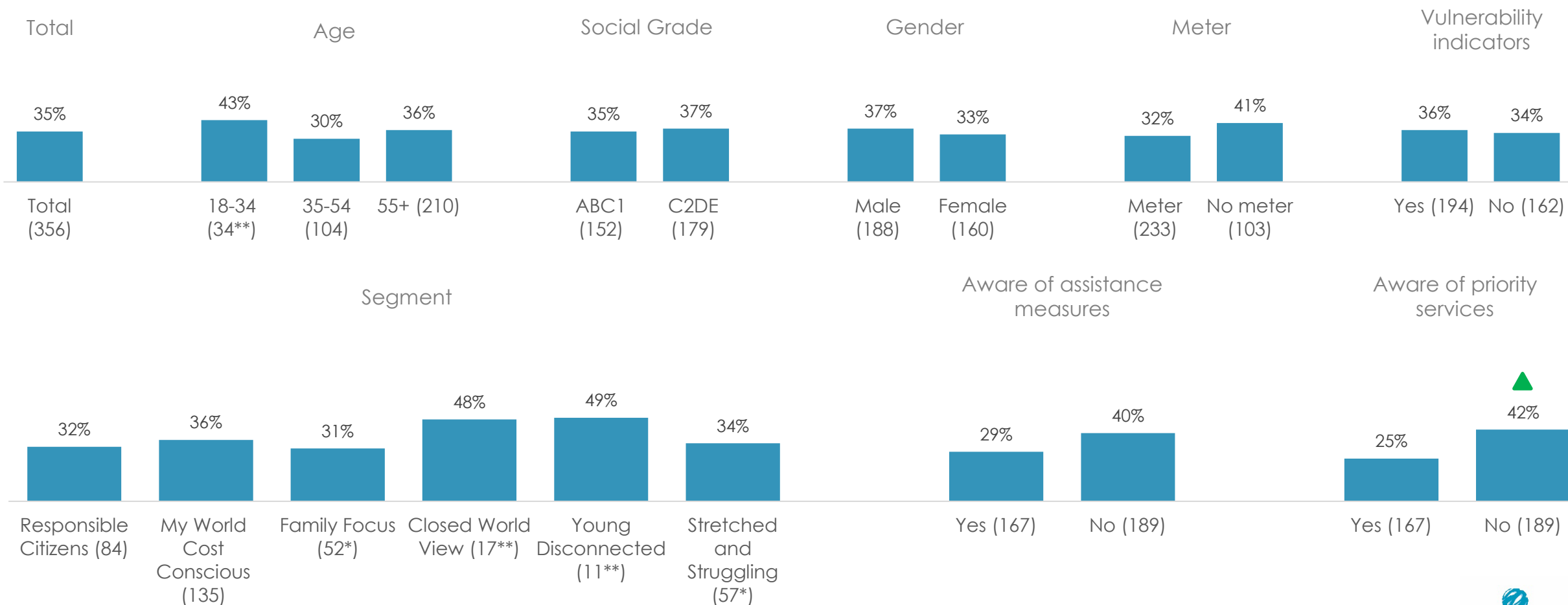


The proportion of those who consider water quality as poor is fairly consistent across subgroups. Though very low base sizes, the data suggests that younger customers are less likely to deem the quality of water of their rivers/sea as 'poor'.

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

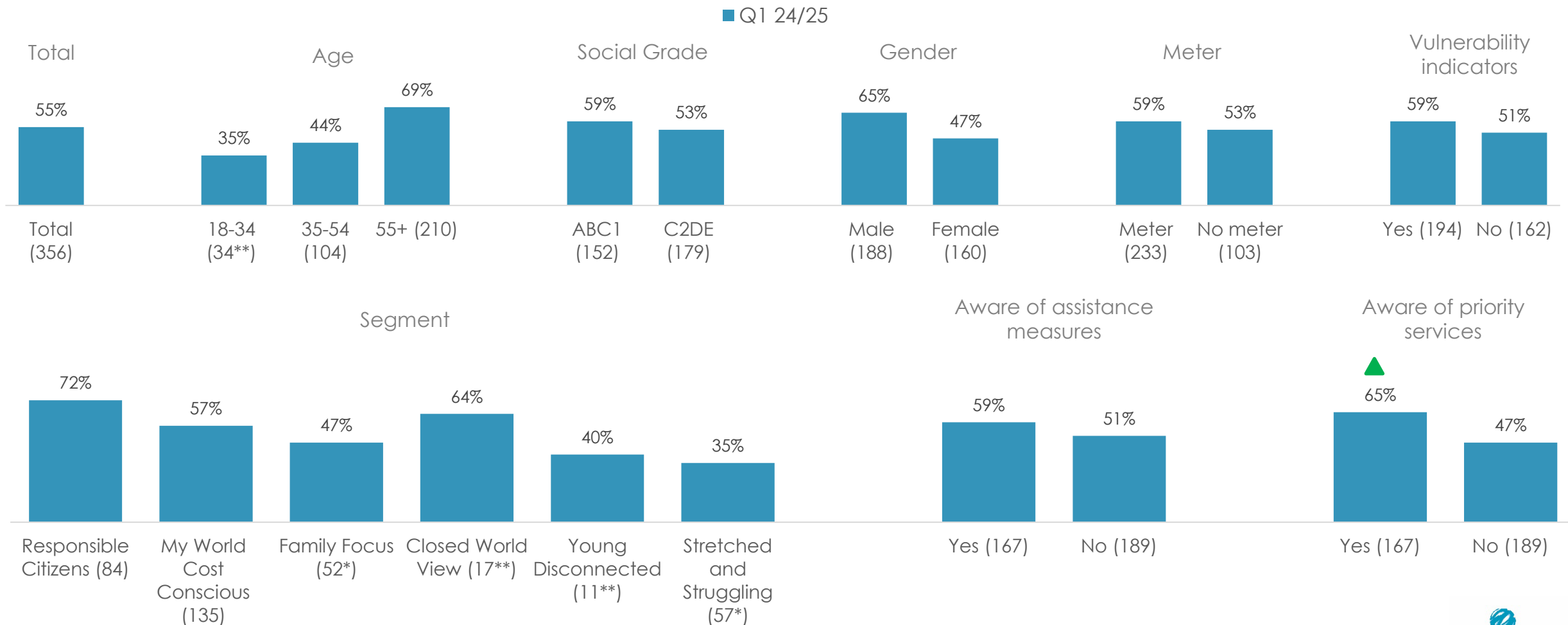
(% Poor)

■ Q1 24/25



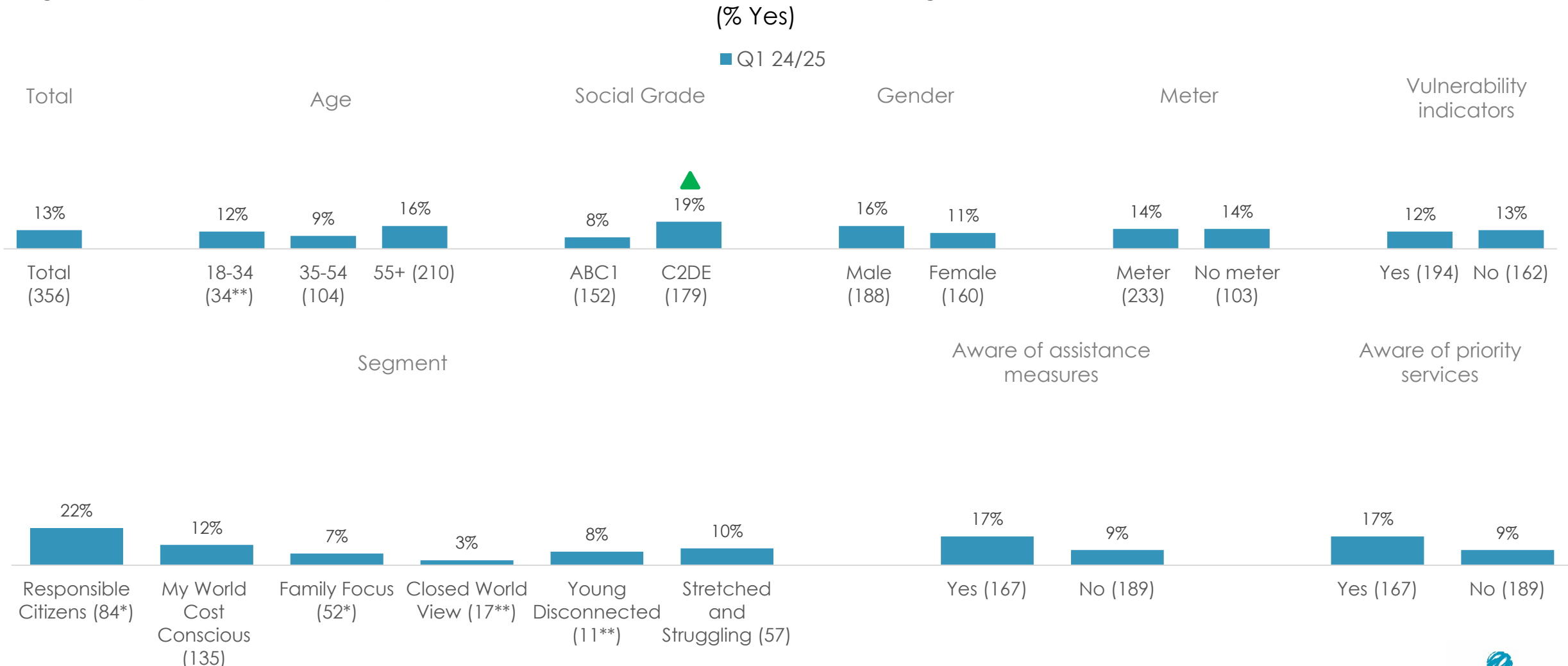
Older customers are more likely to be aware of storm overflows.

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



Just over 1 in 10 claim to have seen information about what Wessex Water is doing to control storm overflow usage – this is fairly consistent across subgroups.

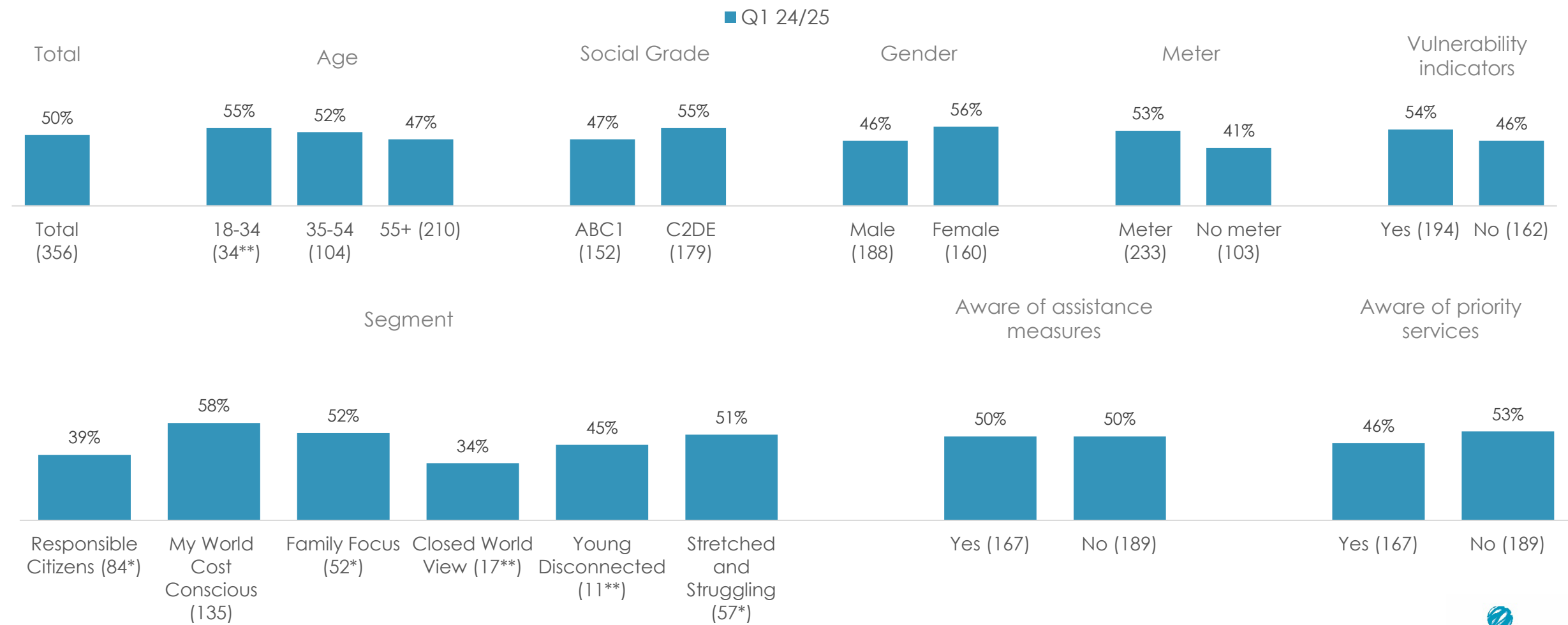
F1g. Have you heard or seen any information about what Wessex Water is doing to reduce storm overflows into rivers or the sea?



Interest in the benefits of smart meters - by key groups Q1 2024/2025

Levels of interest for the benefits of smart meters are similar across key subgroups – although it is particularly appealing to the ‘My World Cost Conscious’, ‘Family Focused’ and ‘Stretched and struggling groups’ whose priorities might be focused on cost saving.

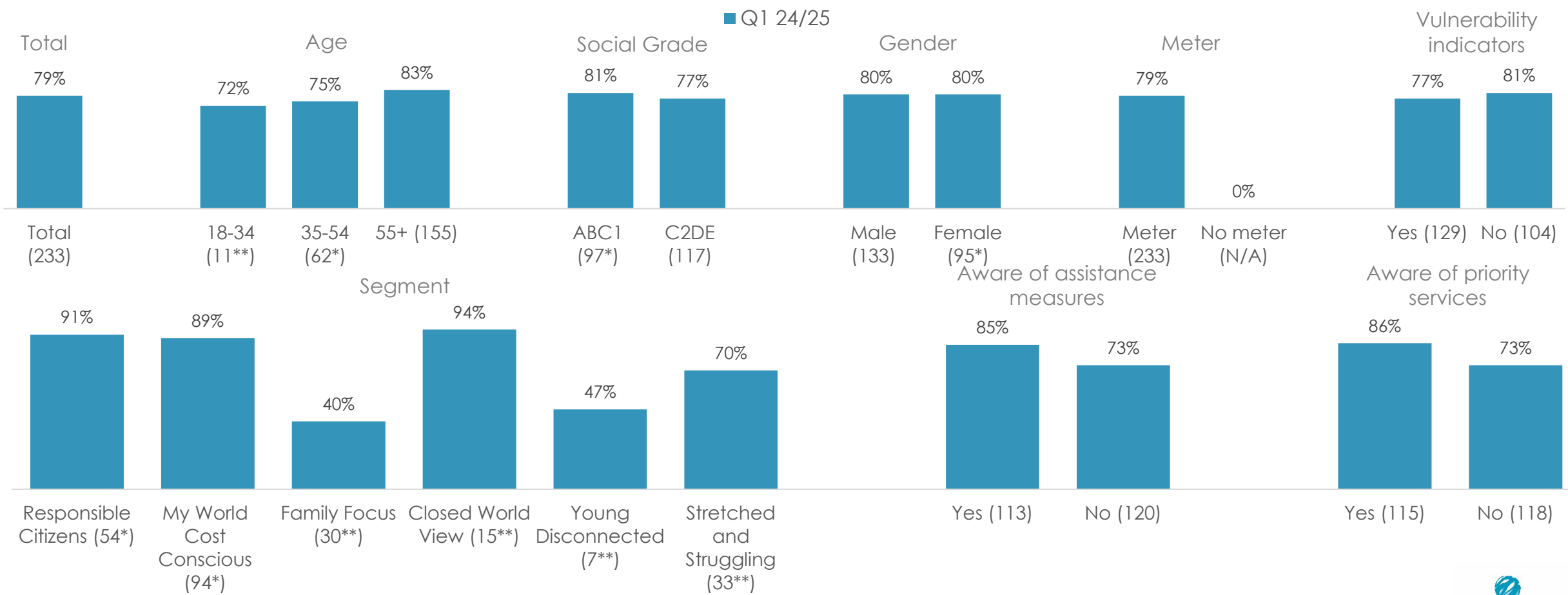
F1. How much would you agree or disagree with the following statements? : “I’d be interested in having more frequent updates on how much water I’m using and how much it is costing”
 (% Strongly/tend to agree)



Managing water use to keep bills down- by key groups Q1 2024/2025

About 4 in 5 say they manage water use to keep bills down – no particular demographic stands out, though it appears the ‘Young and Disconnected’ and ‘Family focus’ groups are less likely to feel this way, perhaps struggling to keep abreast with other life priorities.

F1. How much would you agree or disagree with the following statements? : “I manage my water use to keep the water bill down”
 (% Strongly/tend to agree)

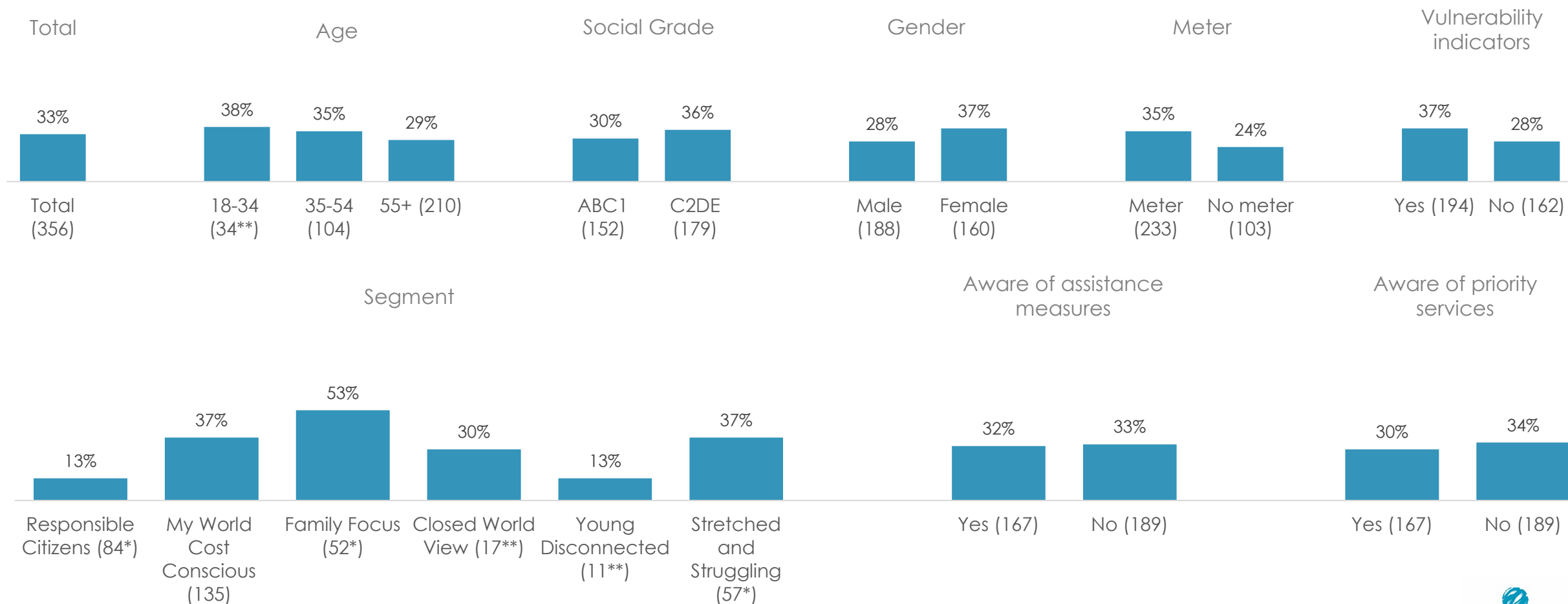


The 'Family Focused' group are more likely to express that they are not sure how to reduce their household's water use - perhaps a more receptive audience for communications around water saving?

F1. How much would you agree or disagree with the following statements? : "I'm not sure how I can reduce my household's water use"

(% Strongly/tend to agree)

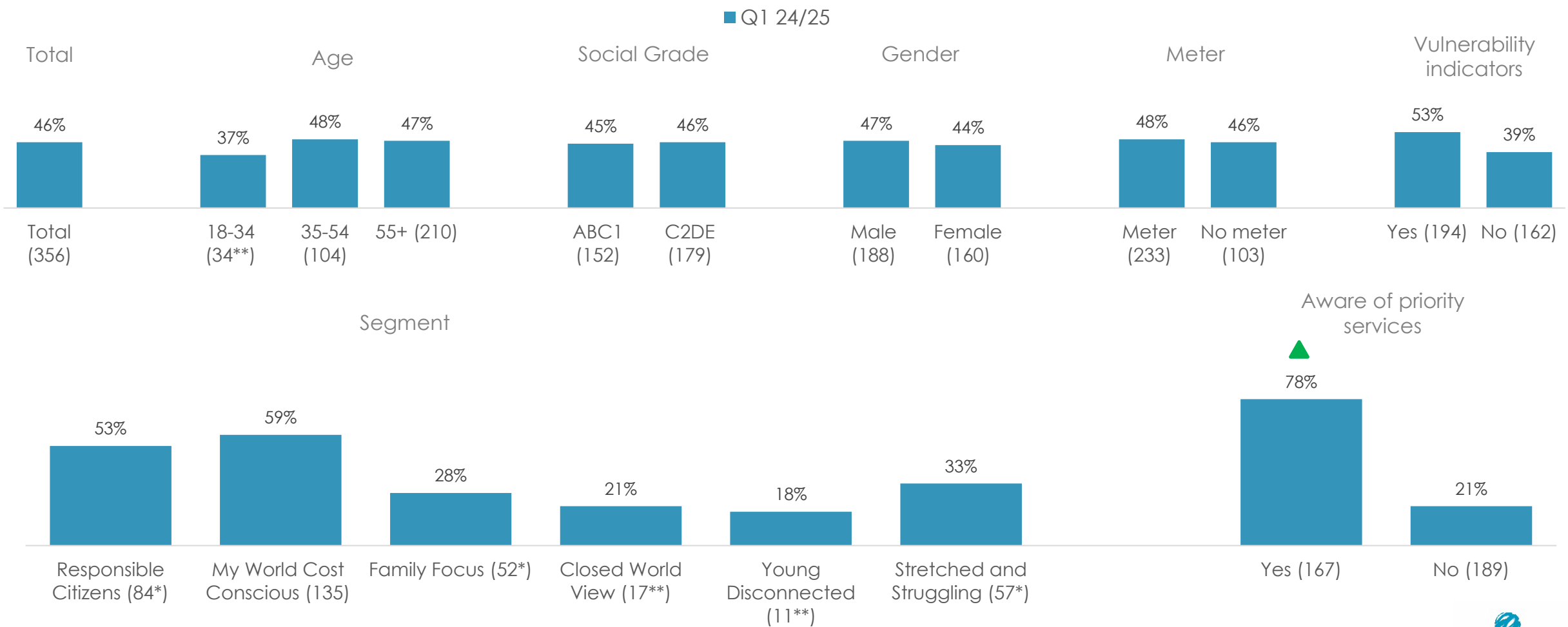
■ Q1 24/25



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

Just under a half of customers are aware of Wessex, however only a third of the 'Stretched and Struggling' segment say they are aware of the financial help that Wessex Water can provide for their customers.

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



Awareness of priority services provided by Wessex Water - by key groups Q1 2024/2025⁸

About 4 in 10 aware of priority services and this is higher amongst those vulnerable customers - however more can be done to highlight these services to the right audience as only 55% of vulnerable customers say they are aware of this service.

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

(% Yes)

■ Q1 24/25

