

Wessex Water Tracker – annual debrief reports

Annual debrief 2021-22

Annual debrief 2020-21

Annual debrief 2019-20

Business plan
2025-2030



Wessex Water
YTL GROUP

FOR YOU. FOR LIFE.



Image Tracker

2021-22 Annual presentation
Including appendix

18th May 2022



Priorities

Performance

Cost of living

Environment

Water use

Communication

A new tracker for 2021-25

Mixed mode
telephone and
online panel
interviewing

Interviewing split
50:50 between
telephone and
online panel,
within all key
quota groups.

Sample definition

All adults 18+ living in the Wessex Water region. Both **bill payers and non bill payers**

- Interviewing **spread across all months of the year** (c.80 interviews per month).
- Demographic profile weighted to **match ONS** (2019-20) for Wessex Water region
- Supply areas represented in actual proportions



600 interviews per year in **Wessex** supply area

300 interviews per year in **Bristol** supply area

100 interviews per year in **Bournemouth** supply area

Questionnaire: Reviewed and extensively developed to reflect objectives for 2021-5, including flexible section

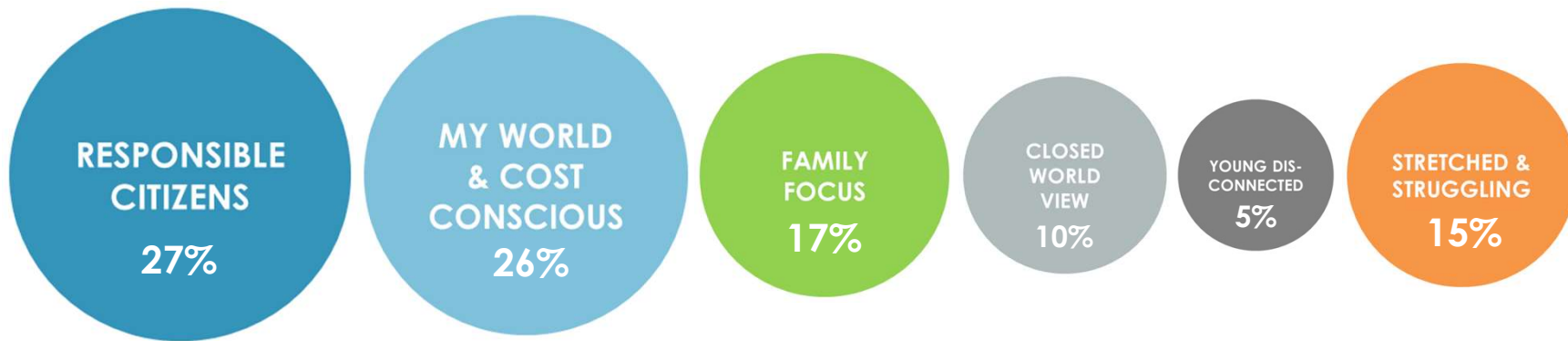
Customers are assigned into one of 6 segments

The segments are based on responses to three questions:

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

The segments vary in size, with the largest (Responsible Citizens) being around 5 times the size of the smallest (Young Disconnected).

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



% of all Wessex Water customers in each segment – 2021-2

Base: All bill payers (827)

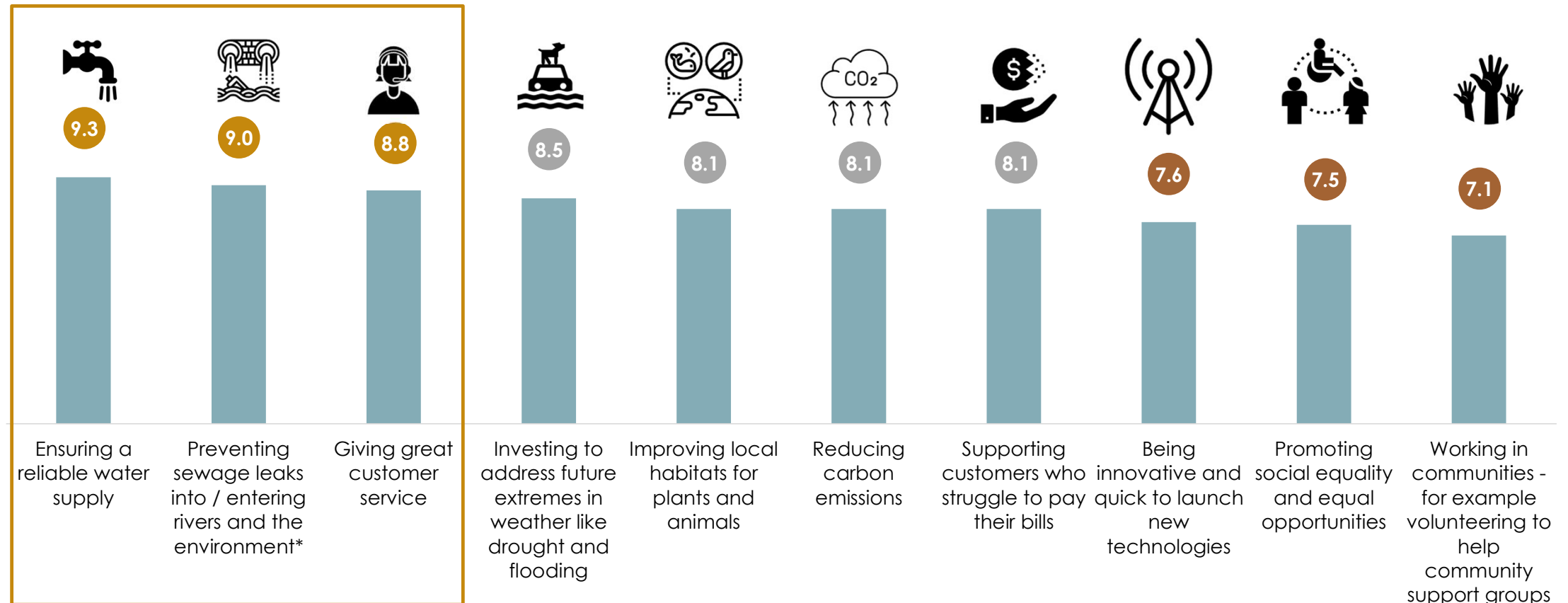


Priorities

What do consumers say Wessex Water should focus on?

This year, through turbulent times, the biggest priority has consistently been ensuring a reliable water supply. Preventing sewage leaks has been second throughout the year – not just a short-term reaction to media coverage of CSO releases.

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 2021/22 (1000)



* New wording introduced part way through Quarter 3 fieldwork.

Overview: What's more / less important by segment?

RESPONSIBLE CITIZENS
(218)

Everything is important!

Across the board, this segment are pushing for high standards. Particularly conscious of topical and 'bigger picture' responsibilities like:

- Preventing sewage leaks
- Investing to address extreme weather
 - New technologies



MY WORLD & COST CONSCIOUS
(213)

Supporting the community is key

Generally rate things as slightly more important than average, especially:

- Promoting social equality
- Working in the community



FAMILY FOCUS
(146)

Busy lifestyle = less engaged

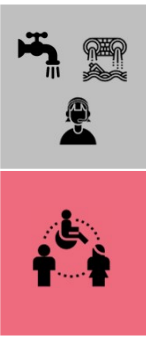
- While ensuring reliable supply, preventing sewage releases and great service are still relatively widely held priorities...
- ...this segment rate most aspects **less** important than average



CLOSED WORLD VIEW
(84*)

Fairly typical priorities

- Directionally above average for importance of core service
- ...although aspects of social purpose **less** important for them



YOUNG DIS-CONNECTED
(34**)

Rate most things less important than average – particularly 'social' role

- Ensuring reliable supply is still a key priority
- Promoting social equality and working in communities are notably less important for this segment

****CAUTION VERY LOW BASE SIZE**




STRETCHED & STRUGGLING
(112)

In relative terms, support for those who struggle to pay is higher on their radar.

In absolute terms, they give slightly lower importance in general

- 'Great customer service' is notably **less** of a concern for them



Q7. How important do you think it is for Wessex Water to focus on each of the following things? Base: All respondents 2021/22 in each segment:)

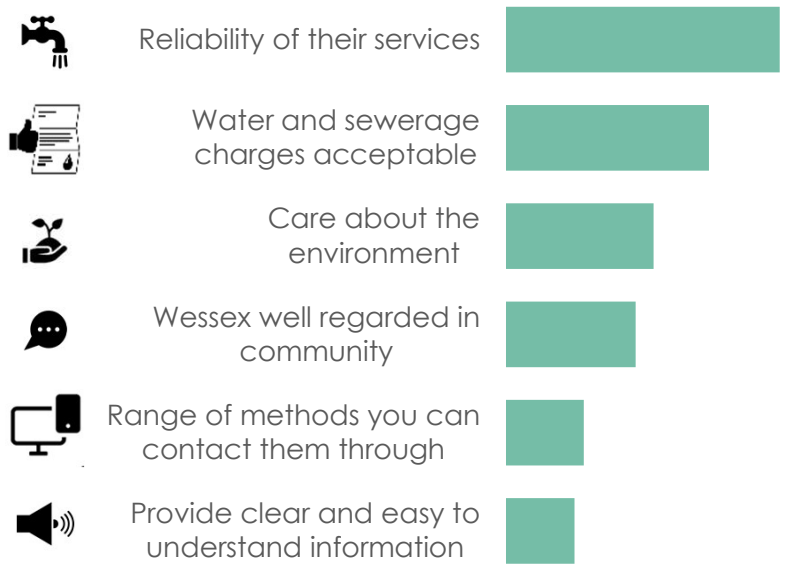
Key: *Low base size; **Very low base size - CAUTION

Key drivers of satisfaction and sentiment (2021-22 multiple regression)

- Satisfaction is driven primarily by Wessex Water seen as **reliable** and having **acceptable charges**.
- These are also key drivers of sentiment towards Wessex, but even more important is customers feeling they **know** Wessex. Being **open and transparent** is also a factor: Active and honest engagement should improve brand equity.



Contribution of key drivers

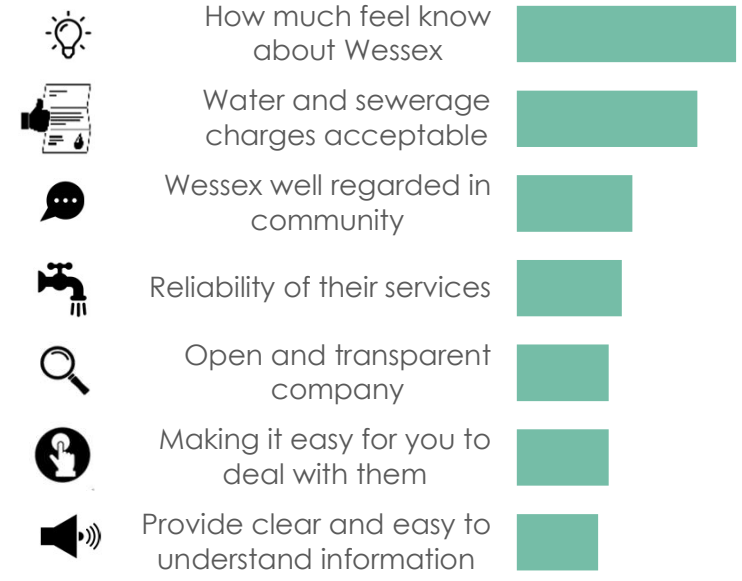


The model accounts for 50% of the variation of satisfaction

"I've only ever had to have them sort a problem out many years ago and they sorted it very quickly. I often see them out and about doing what they're supposed to be doing, and I think the bills are very fair. I'm happy with them overall".



Contribution of key drivers



The model accounts for 43% of the variation of sentiment

"(Be) honest about their shortcomings, especially over impact on the environment, and how they are addressing it. At the moment it feels like we are lectured about what we need to do and little about the company other than promotional guff."

Indicators of trust



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**.

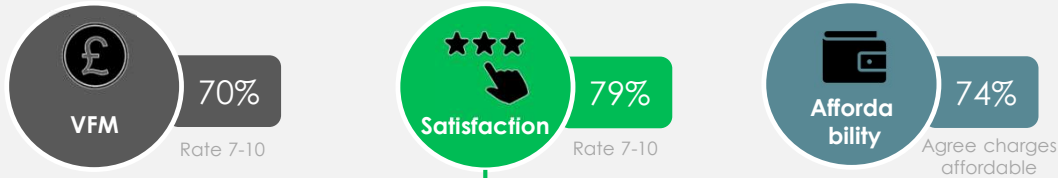
Trust dimensions	Tracker measures included
Customer ethos	<ul style="list-style-type: none"> • Care about you and your community • Making it easy for you to deal with them
Competence and capability	<ul style="list-style-type: none"> • Provide exceptional service • Fix any problems quickly
Reliability 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

A black faucet is the central focus, with a single drop of water falling from its spout. The background is a soft, out-of-focus bokeh of warm, yellow and white lights. A semi-transparent teal horizontal bar is positioned across the middle of the image, containing the word "Performance" in white, bold, sans-serif font.

Performance

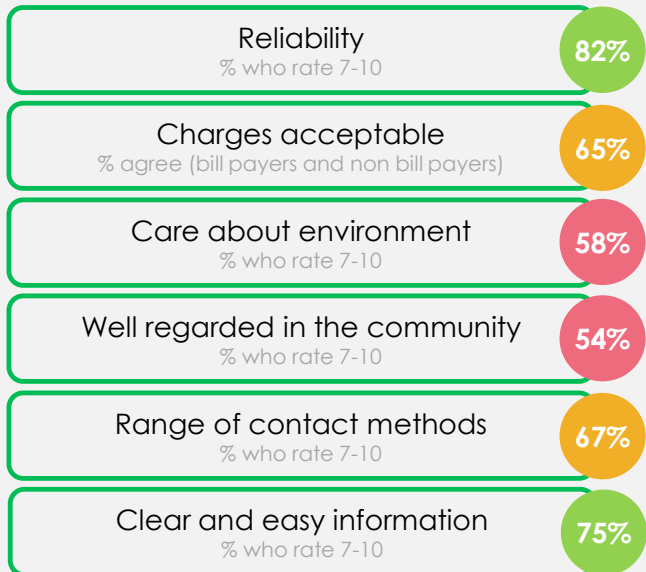
Dashboard 2021-22

Core performance

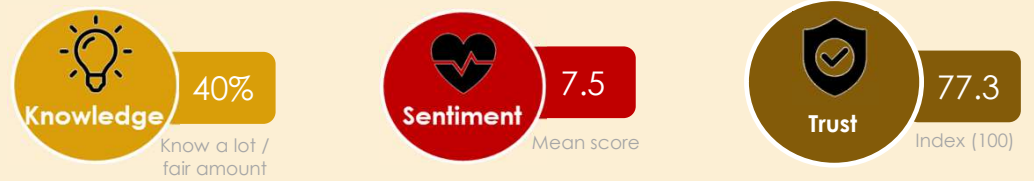


Satisfaction drivers

MOST IMPORTANT



Brand health



Hot topics

CSOs



50%

Aware of CSOs

28%

Think CSO operation is unacceptable

13%

Think local river / sea water is poor quality

Water use



71%

'Make effort' to save water

32%

Not sure how can reduce use

35%

Interested in smart meter

Economic



55% think they will be worse off in 12 months (Jan-Mar '22)

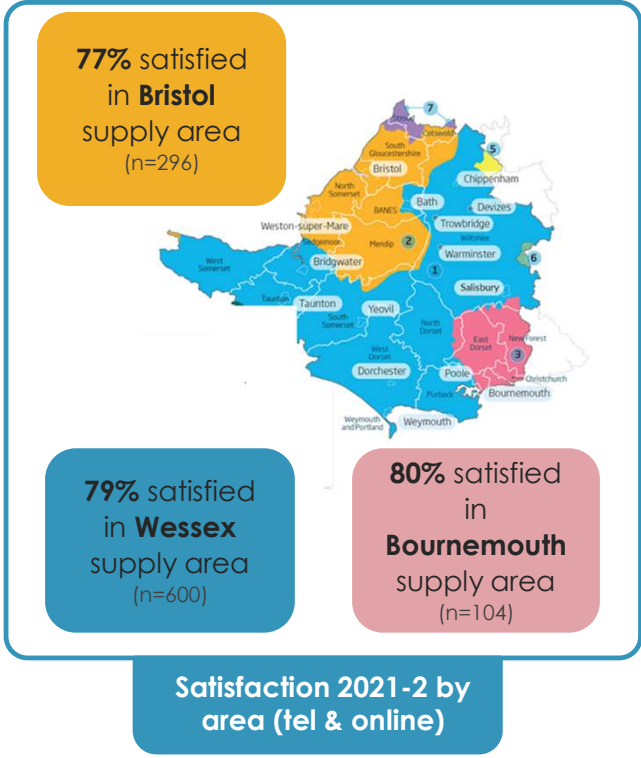
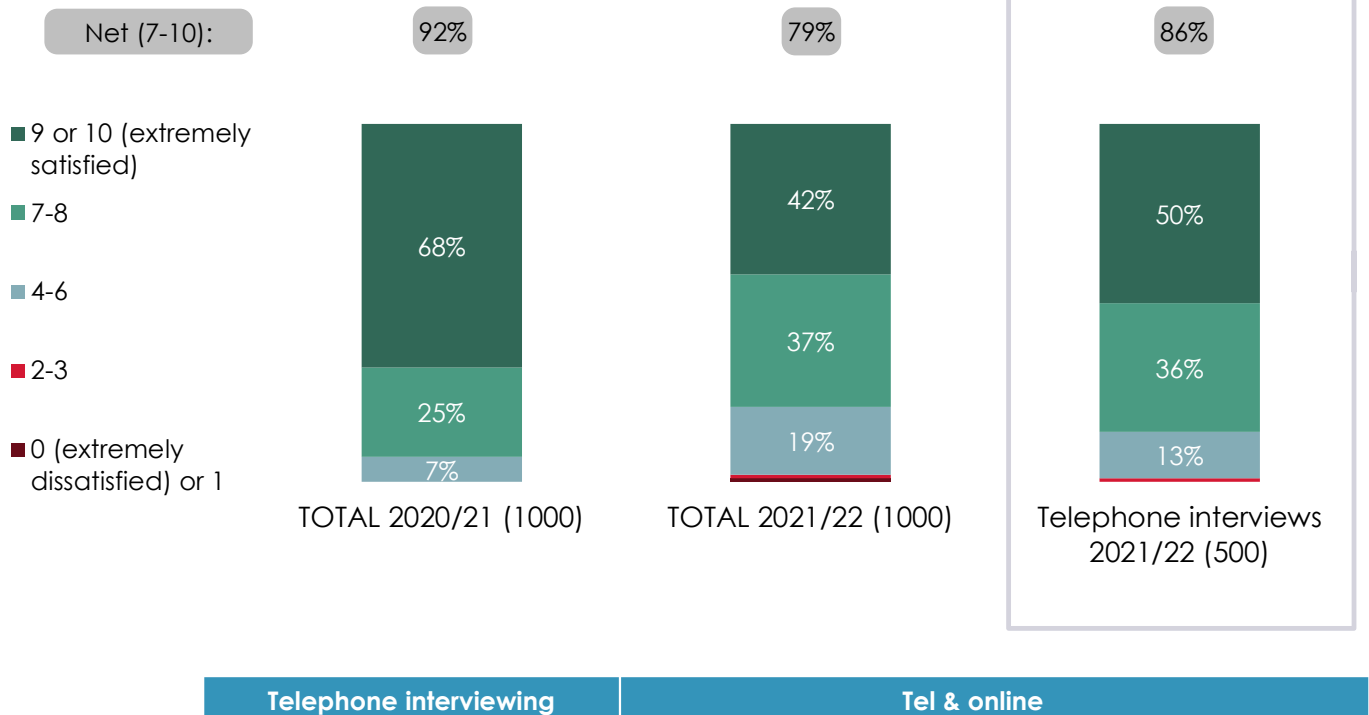
25%

Worry about affording water bill (Jan-Mar '22)

Overall satisfaction

Overall satisfaction this year is 79% - very similar across all three supply areas. People interviewed by telephone give higher satisfaction scores than those responding online because of the research method effect. The score for this year based on just the telephone interviews is 86%, compared to 92% last year (telephone only) - a slight decrease

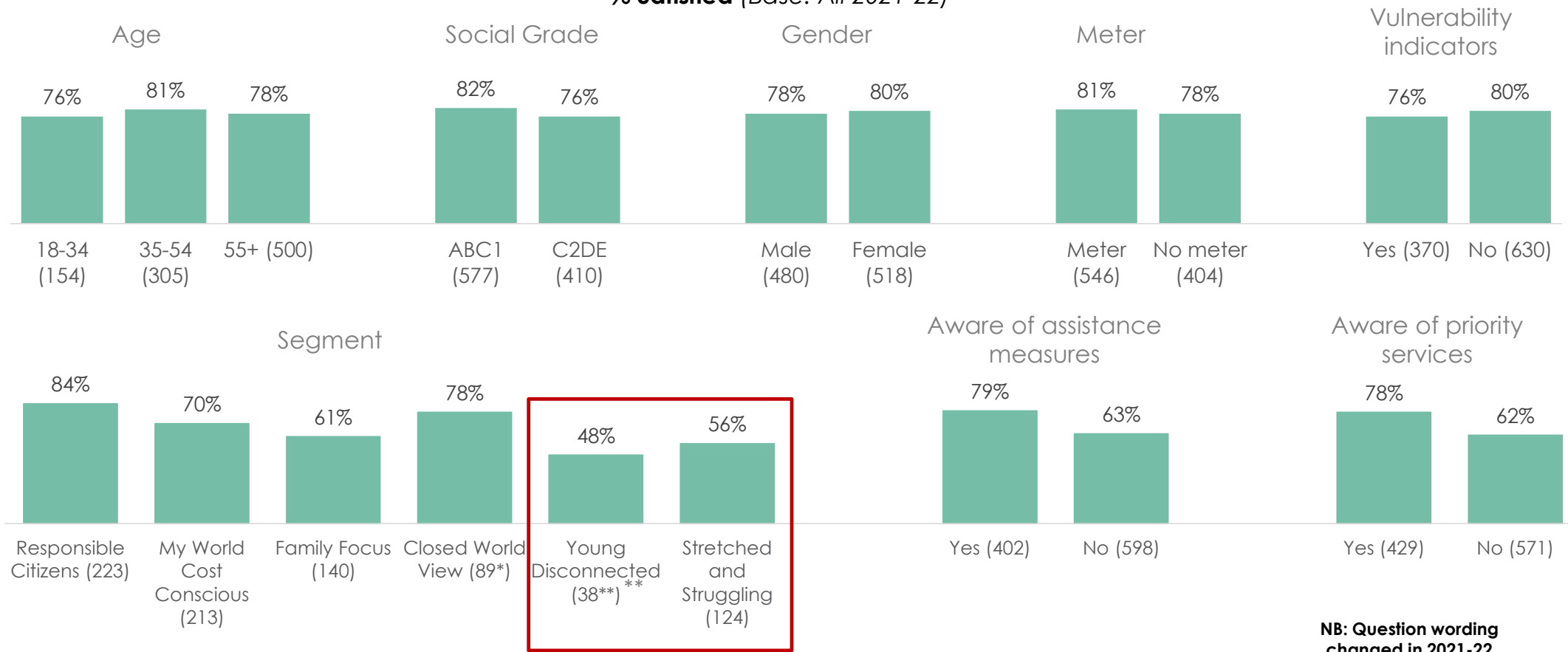
Q11 Taking everything into account how satisfied are you with Wessex Water? Base: All respondents



Overall satisfaction by key groups 2021-22

Satisfaction is reasonably consistent across demographic groups, those with and without a meter, and those with and without vulnerability indicators. 'Stretched and struggling' and 'Young Disconnected' segments are those where most attention is needed to try and build satisfaction.

Q15 Taking everything into account how satisfied are you with Wessex Water?
 % Satisfied (Base: All 2021-22)



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

NB: Question wording changed in 2021-22

Why satisfied / not satisfied

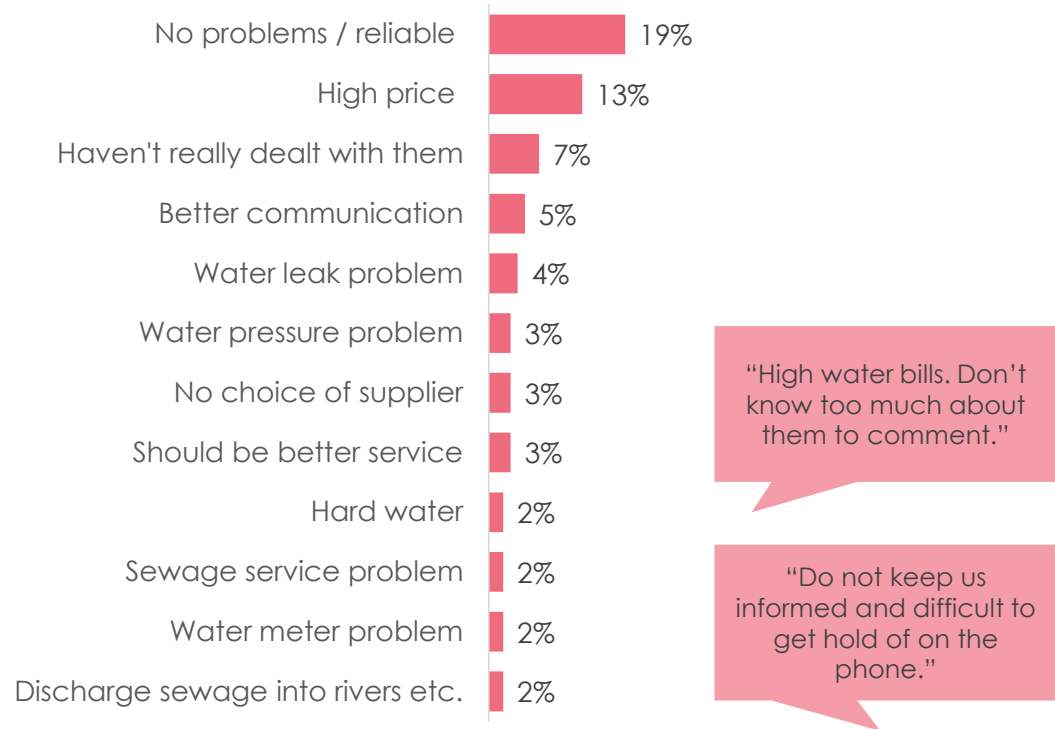
When consumers think about satisfaction, they tend to think about their direct experience. 'Top of mind' reasons for satisfaction continue to be mostly about being reliable and problem-free. For the minority who are less satisfied there's a mix of reasons – price, the need for better communication, water leaks and pressure problems are mentioned most.

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: 789



Those who are less than satisfied (score 0-6) Base: 211

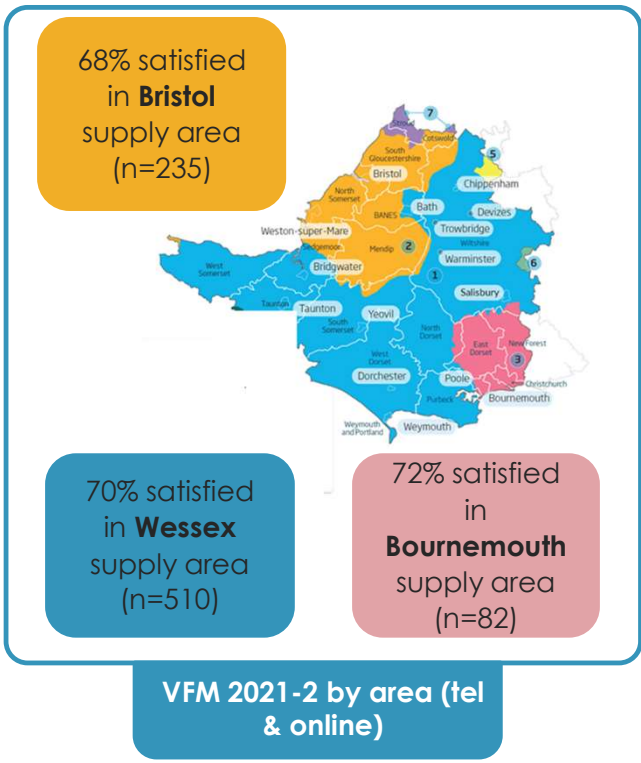
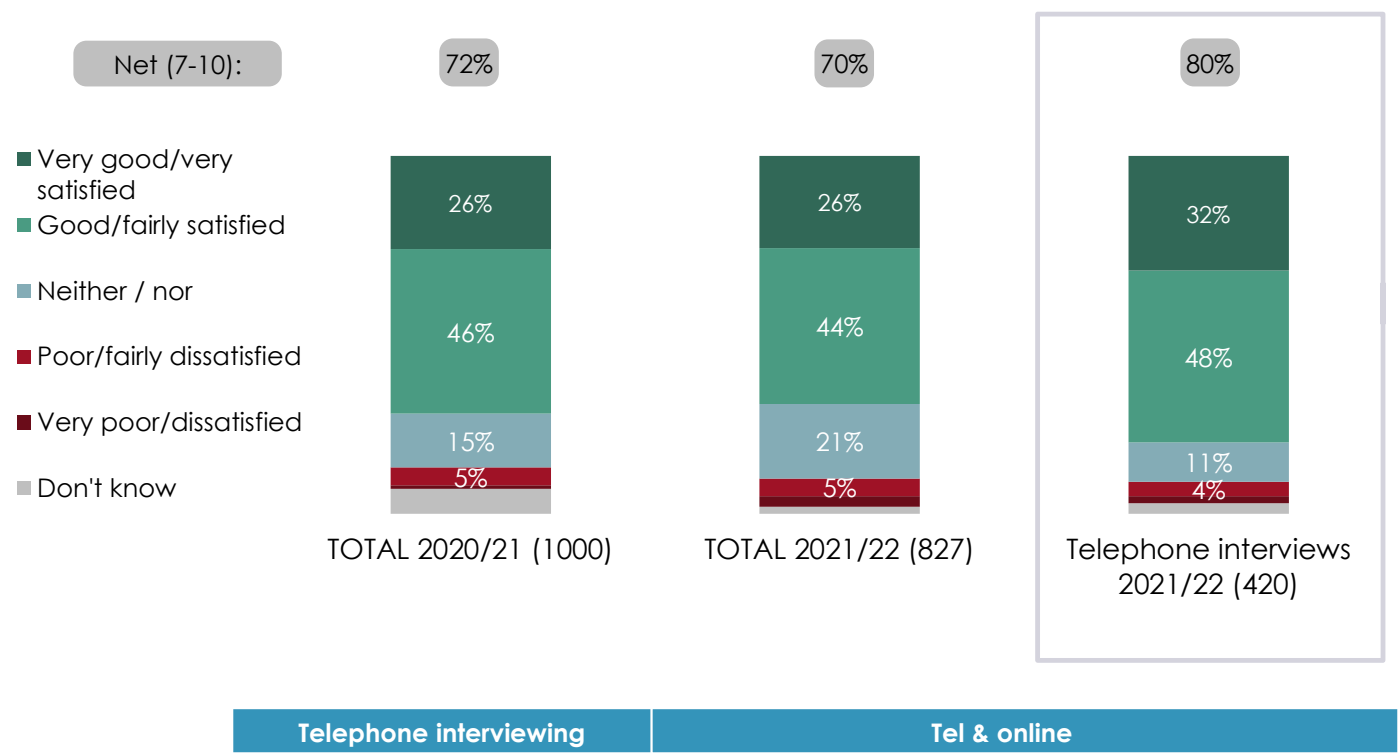


Overall value for money

Satisfaction with **value for money** this year is 70% - very similar across all three supply areas.

- Both the question wording and the interview method have changed this year, and non bill-payers are no longer asked, so it is difficult to compare year on year. Looking just at telephone interviewing, the score is higher this year.

Q22. How would you rate the drinking water supplies and the sewerage service you receive in your area in terms of value for money? / Q16. How satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? Base: All consumers / all bill payers



Knowledge and sentiment



Knowledge

People in the Wessex Water region still **don't feel they know much about Wessex.**



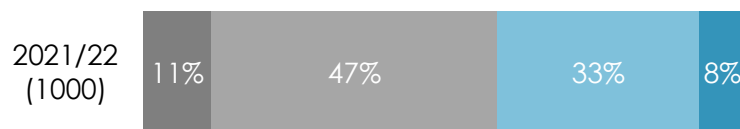
Sentiment

It is encouraging that 1 in 3 Wessex Water customers are very positive towards them. Though there still is a sizable portion of 'neutrals' who could be uplifted.

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

Base: All respondents

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



News coverage of Wessex Water and having direct contact with them can be important factors in increasing how much people feel they know about them.

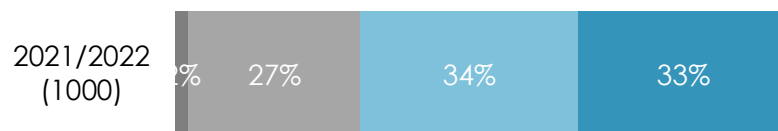
Highest for knowledge (a lot or fair amount):

- Those who have seen Wessex in the news (65%)
- Those who have contacted Wessex in last 6 months (61%)

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

Base: All respondents

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



Mean: 7.5

Touchpoints with Wessex Water that create a positive brand halo are social media, knowing about financial assistance, and making direct contact.

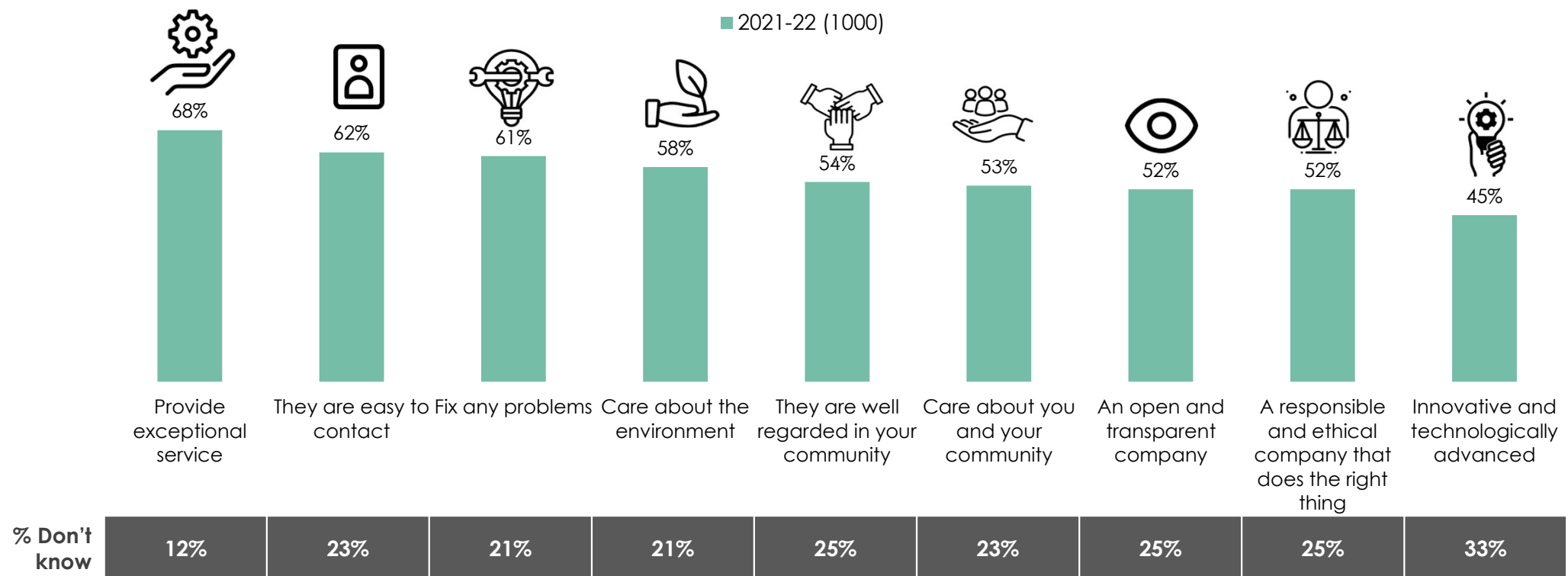
Highest for sentiment (very positive):

- Seen Wessex on social media (47%)
- Aware of financial assistance (45%)
- Contacted Wessex in last 6 months (42%)

Image of Wessex Water

Across 2021-22 nearly 7 in 10 consumers agree that Wessex Water provide exceptional service - strong testament to Wessex Water's continued pride in providing an excellent customer experience. In most other respects Wessex has a less defined image – with many simply not knowing the company well enough to comment.

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)



"Never had any problems but as a result of that don't know much about them and haven't needed to contact or deal with them."

"To be honest I don't know a lot about them other than I pay them for my water supply. I have no idea of their ethics or values or even if I am getting a fair price."

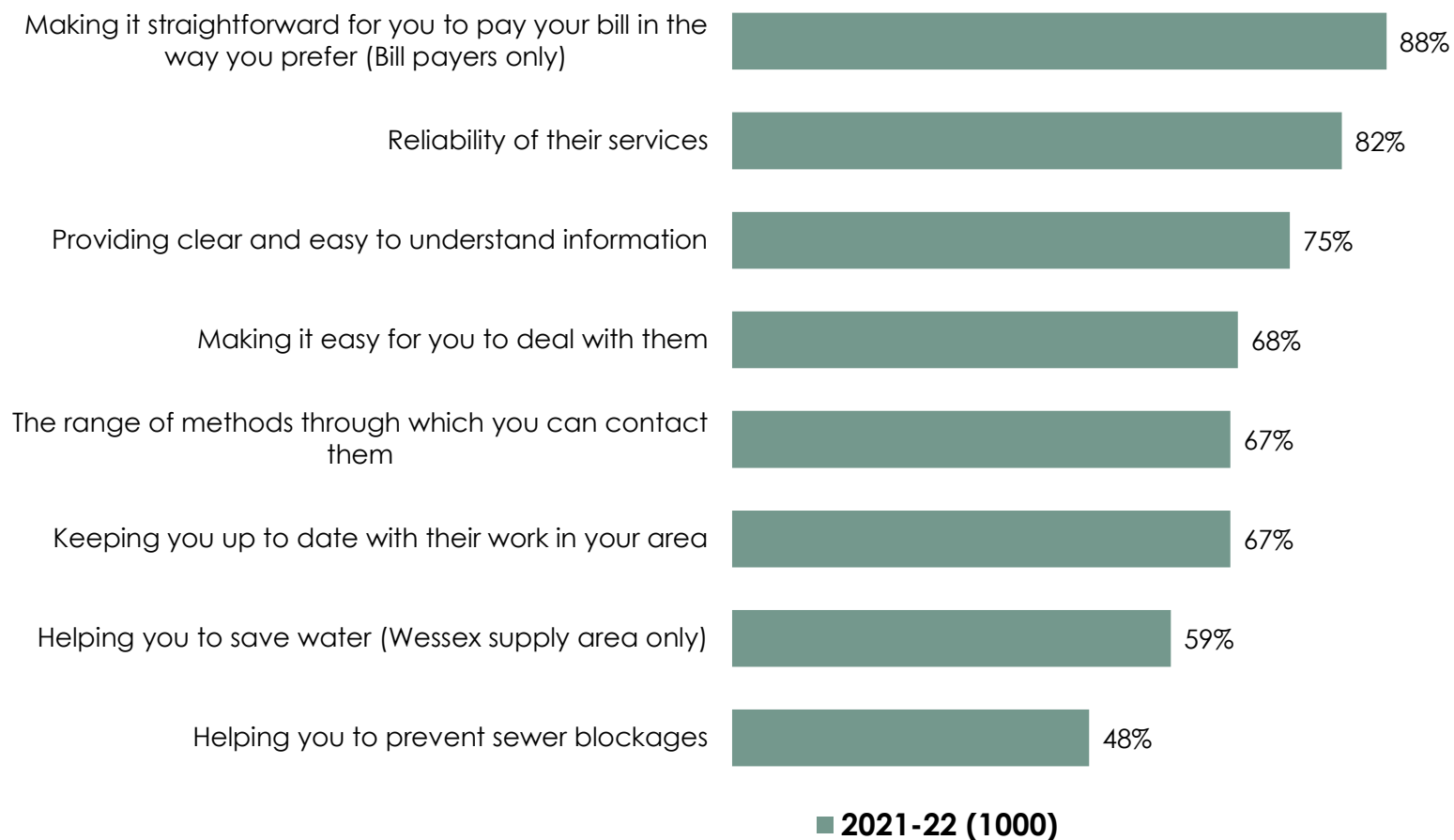


Wessex Water excels in making payments straightforward with nearly 9 in 10 customers rating this highly; and reliability (a crucial factor behind satisfaction) has consistently been rated very strongly.

There are improvements to be made on communications: 'helping customers save water' and 'helping prevent sewer blockages'.

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

Base: All respondents



Trust Index



The Overall Index Score for this year is 77.3, the baseline for ongoing tracking.

Reliability and dependability is the element that stands out as strongest for Wessex Water – a need to maintain this.

Meanwhile 'Ethics' and 'Brand Validation' have the most headroom to improve.



Trust dimensions	Tracker measures included	Mean score
Customer ethos	<ul style="list-style-type: none"> Care about you and your community Making it easy for you to deal with them 	7.6
Competence and capability	<ul style="list-style-type: none"> Provide exceptional service Fix any problems quickly 	7.7
Reliability and dependability	<ul style="list-style-type: none"> Reliability of their services Easy to contact 	8.2
Transparency	<ul style="list-style-type: none"> Open and transparent company Providing clear and easy to understand information 	7.9
Ethics	<ul style="list-style-type: none"> A responsible and ethical company that does the right thing Care about the environment 	7.4
Brand validation	<ul style="list-style-type: none"> Well regarded in your community 	7.4

Reliability and dependability stands out as strongest - maintain

Ethics and brand validation are the areas with most scope for improvement

Base: All respondents 2021-2 (1,000)

Differences in image & performance of Wessex Water by segment

RESPONSIBLE CITIZENS
(218)

Higher ratings:

- Provide exceptional service
- Care about you and your community

All performance aspects – particularly aspects of communication

- Trust Index

...KNOW AND LIKE WESSEX ALL-ROUND

MY WORLD & COST CONSCIOUS
(213)

Higher ratings:

- Fix any problems
- Well regarded in your community
- Help you save water

...RATE WESSEX WELL ON ASPECTS RELEVANT TO THEM – BASED ON CONTACT & EXPERIENCE

FAMILY FOCUS
(146)

Higher ratings:

- Relatively higher for easy to contact

Lower ratings:

- Relatively lower for keeping you up to date with their work in your area
- Trust Index

...HARD TO GET THEIR ATTENTION

CLOSED WORLD VIEW
(84*)

Higher ratings:

- Relatively higher for Wessex care about the environment
- Generally rate Wessex highly for performance – particularly for clear and easy info
- Trust Index

...POSITIVE ON PRACTICAL ASPECTS

YOUNG DISCONNECTED
(34**)

Lower ratings:

- Generally lower for both image and performance – and particularly so for helping save water

***CAUTION LOW BASE SIZE**

...VERY DISENGAGED, OFTEN 'DON'T KNOW' RATHER THAN DISAPPROVAL

STRETCHED & STRUGGLING
(112)

Higher ratings:

- Relatively higher for 'Making it easy to deal with them'

Lower ratings:

- Generally lower, particularly on performance measures

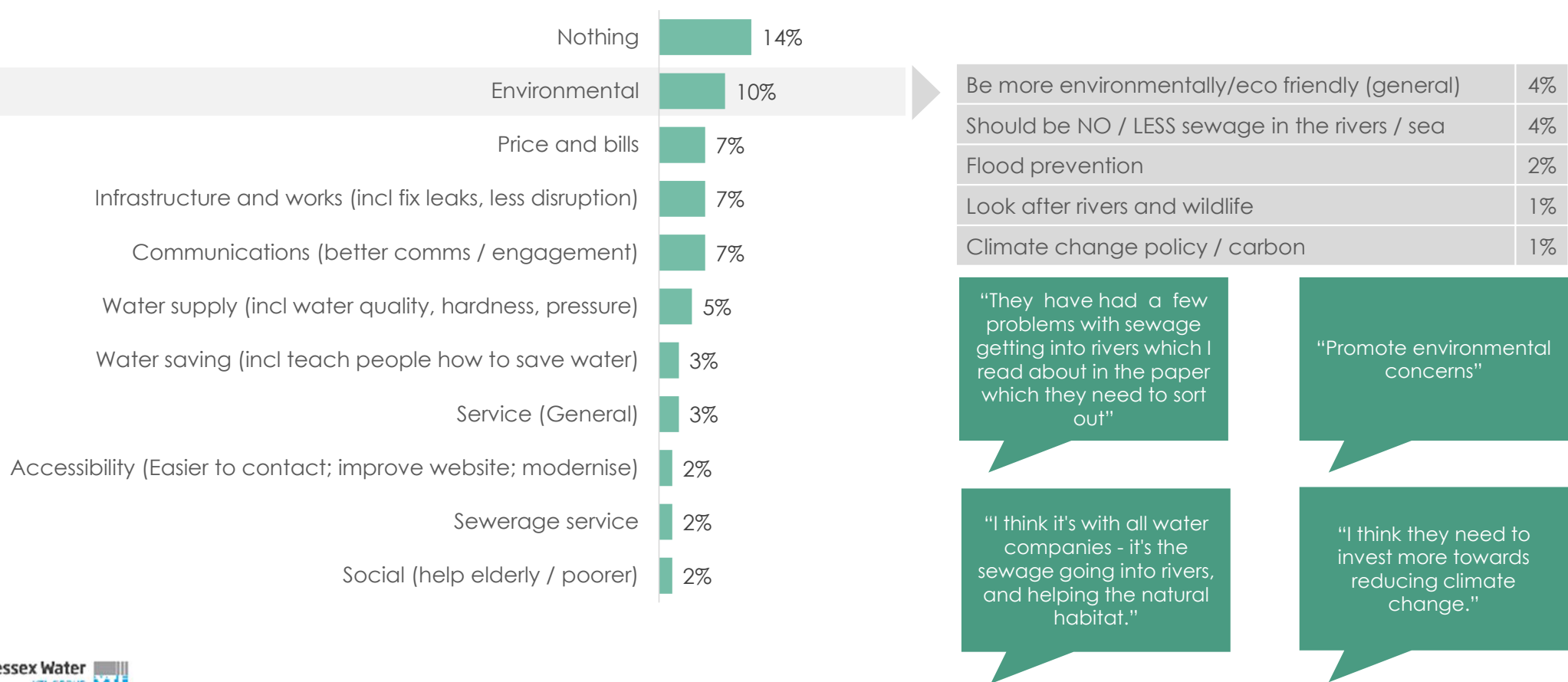
...ENCOURAGING SIGNS THAT WESSEX MAY SEEM MORE ACCESSIBLE, BUT STILL ADRIFT

Q8: Thinking about your impressions of Wessex Water, how much would you agree or disagree with the following statements? (% Agree 7-10) Q13. How would you rate Wessex Water's performance in the following areas? % rating 7-10 (10 = 'excellent' 0 = 'very poor'). **Base:** All respondents 2021-2.
Key: *Low base size; **Very low base size - CAUTION

Looking ahead, what can be improved?

'Environment' is the most widespread area that consumers spontaneously mention Wessex could improve on. This is higher on the agenda than price or bills. It is a mix of being eco friendly in general and ensuring no / reduced sewage release.

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



Where should the focus be?



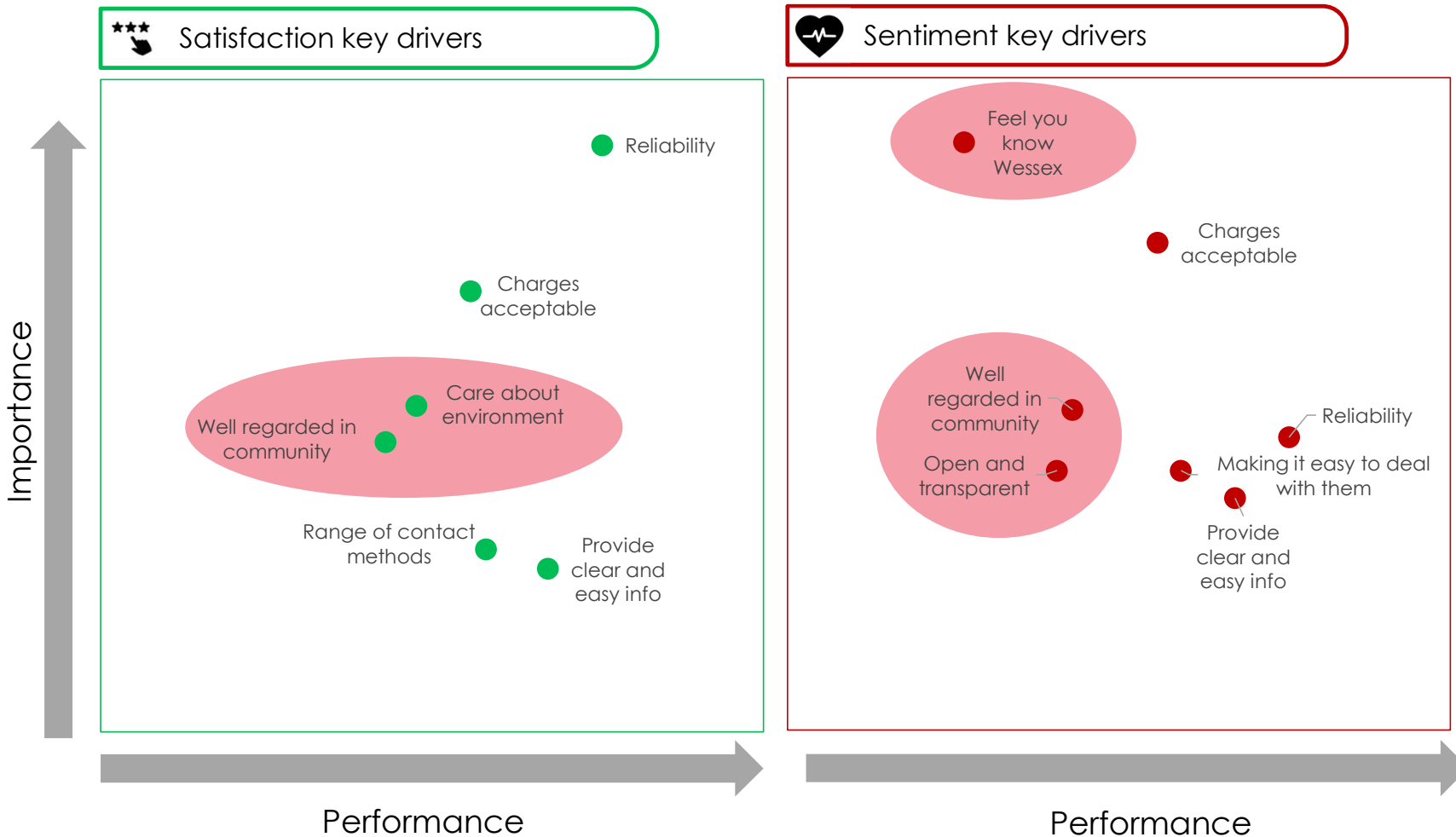
Satisfaction

Crucial to **maintain** reliability; the areas with greatest scope to **improve** are 'well regarded in the community' and 'care about environment'



Sentiment

The key focus needs to be **improving** the sense that people know Wessex better. Also be **more** visible doing positive work and **grow** evidence of openness and transparency

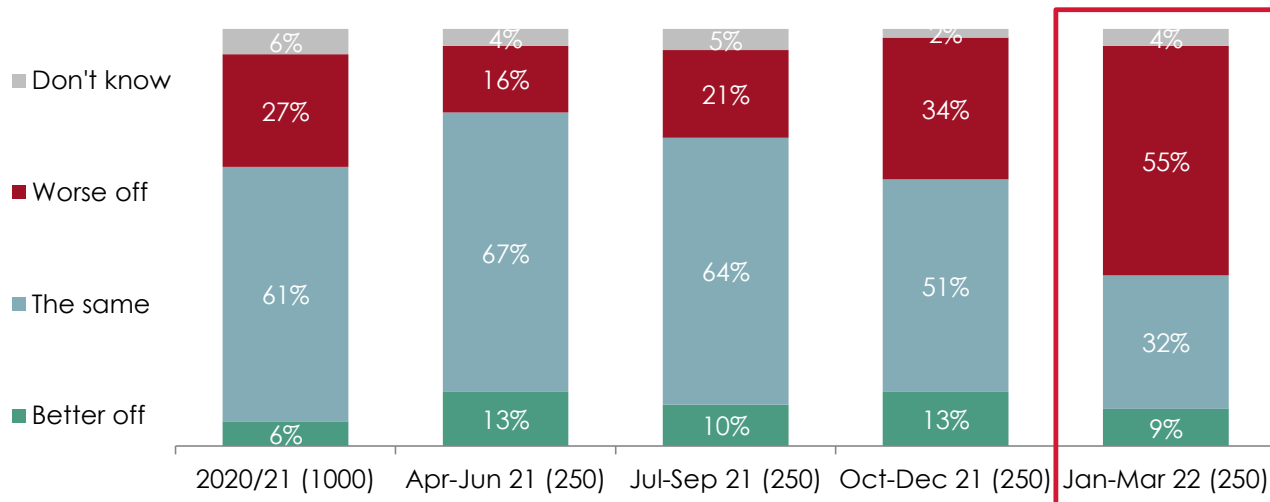
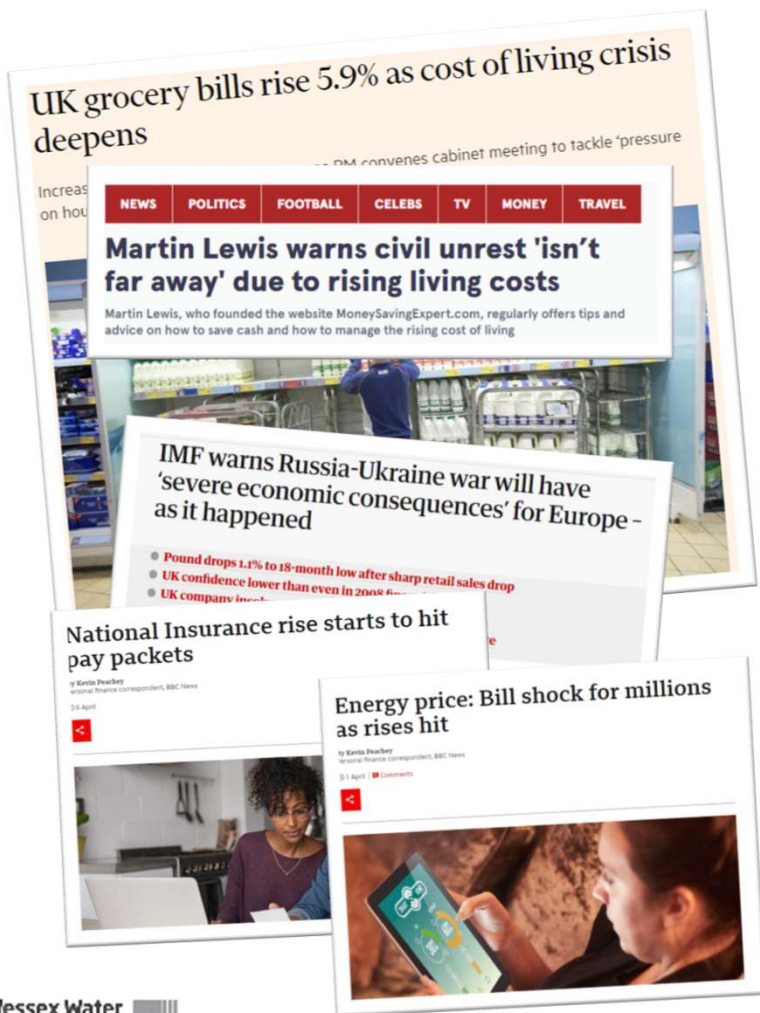




Household financial situation

Household finances: A turbulent landscape

With rising prices, and widespread reports of the cost of living crisis, there's very significant growth in the view that households will be worse off in the next 12 months – in early 2022 notably higher than any point in the last 5 years.



Q11/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

Who thinks they will be worse off?

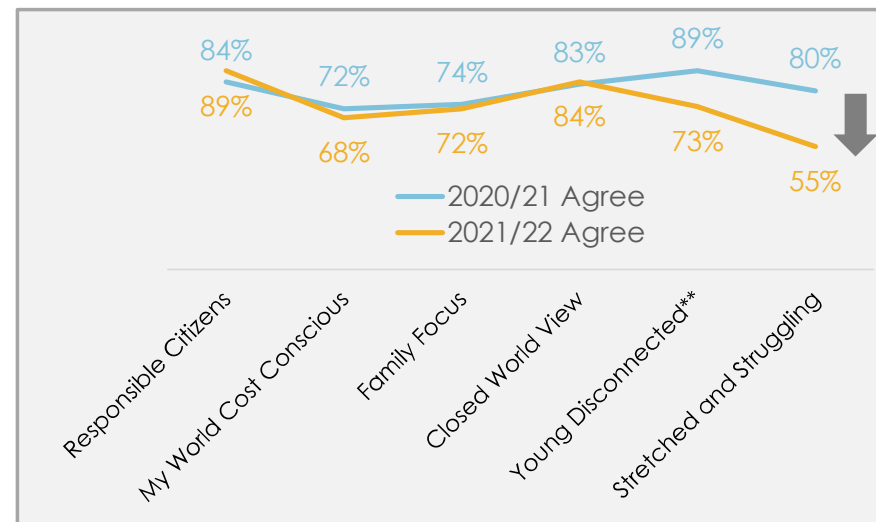
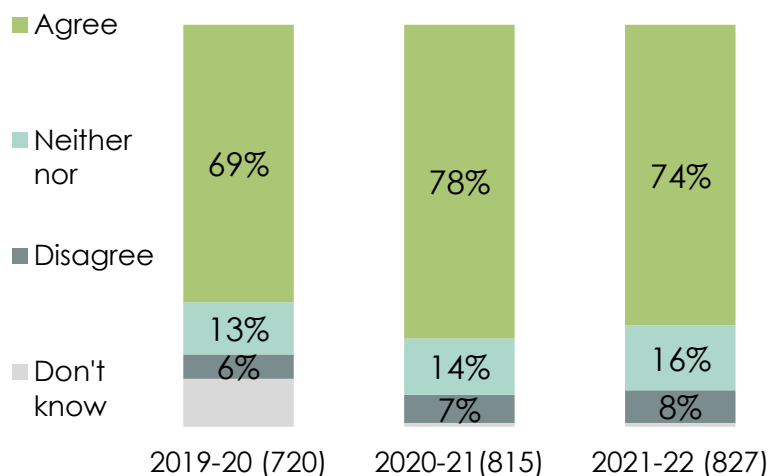
- Demographics: **All social grades** (not just lower) and **all segments**; Slightly more likely to be older
- Attitudinal: Particularly those who **cannot afford charges**; those who are not interested in a smart meter and who don't know how to save water
- Slight correlation with **negative sentiment** to Wessex and **lower VFM** and, but **not strongly linked**

Despite the radical changes in future financial outlook, so far affordability across the sample has remained relatively stable.

However, 'Stretched and Struggling' and 'Young Disconnected' segments have seen bill affordability reduce from the high levels last year, as Covid-related support is withdrawn and higher cost of living starts to bite.

Meanwhile bill anxiety has shown signs of increasing in the first three months of 2022 – an early sign of more dramatic shifts to come?

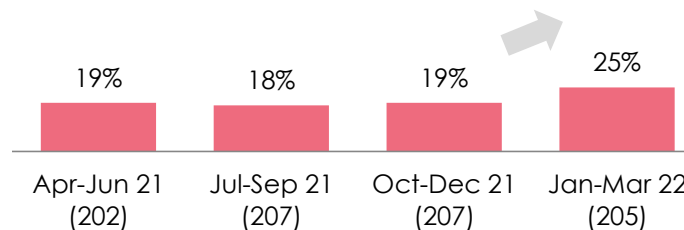
Q19b. How much do you agree or disagree that the total water and sewerage charges that you pay are AFFORDABLE to you? Base: All bill payers



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

I worry about being able to afford my water bill

% agree (7-10)
(Quarterly for 2021-2)



Bill anxiety may be starting to rise in the first part of 2022, although so far **not significantly**

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

Where next on living costs and water bills?

- The broader cost of living crisis is set to get worse
- April data from GfK shows the consumer confidence index 'going into freefall'
- People so far are making a clear distinction between their water bills and rising costs for other utilities
- Making sure people know about relevant bill support will be essential – more people liable to be in water poverty in coming months
- Is there an opportunity for smart meters in a climate where people will be looking to make savings? Or will it be 'the final straw' as people are obliged to economise on energy?

Views on bills often reference protecting those in difficult circumstances

"They've put the bill down recently. One of the few companies that reduce their prices. It's the cheapest utility we have."

"Lower the prices and let them think of the disabled and OAP'S both of which describe me!"

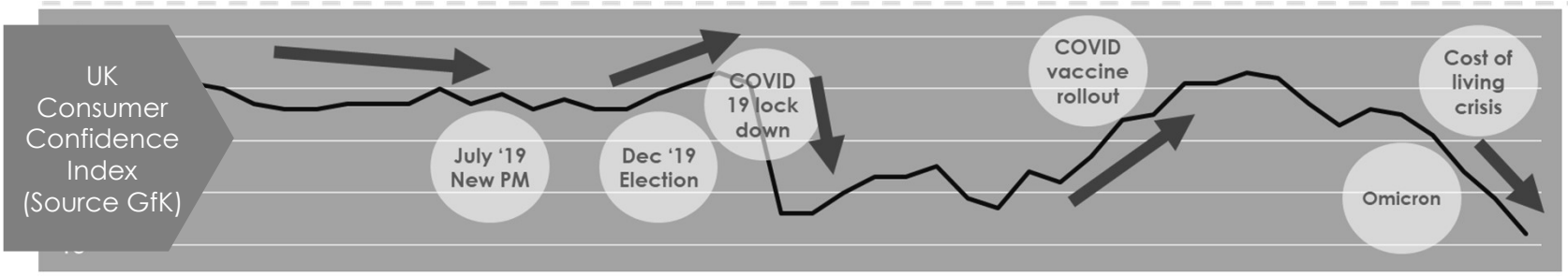
"Keep water bills down. As with increased energy and proposed National Insurance increases, money for many will be tight".

"Ensure that they are providing support to people who are on a low income"

"It's good that the bill doesn't rise unlike the council tax which went up by nearly two hundred pounds ."

"We don't have any choice when it comes to paying the bill"

"Could lower the cost. Customers could be put in bands depending on their circumstances"





Environment and CSOs

Environmental agenda throughout 2021-22

We have seen fluctuating focus on the climate crisis over the last year, peaking over the Autumn.

Spring 2021

- Covid restrictions being gradually lifted

Autumn 2021

- COP26 begins October 21st for two weeks in Glasgow
- Parliament vote on CSOs and heightened media scrutiny
- Net Zero strategy report published by government
- Insulate Britain protests blocking off roads and infrastructure

Spring 2022

- Latest IPCC report published warning of an 'atlas of human suffering'

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Summer 2021

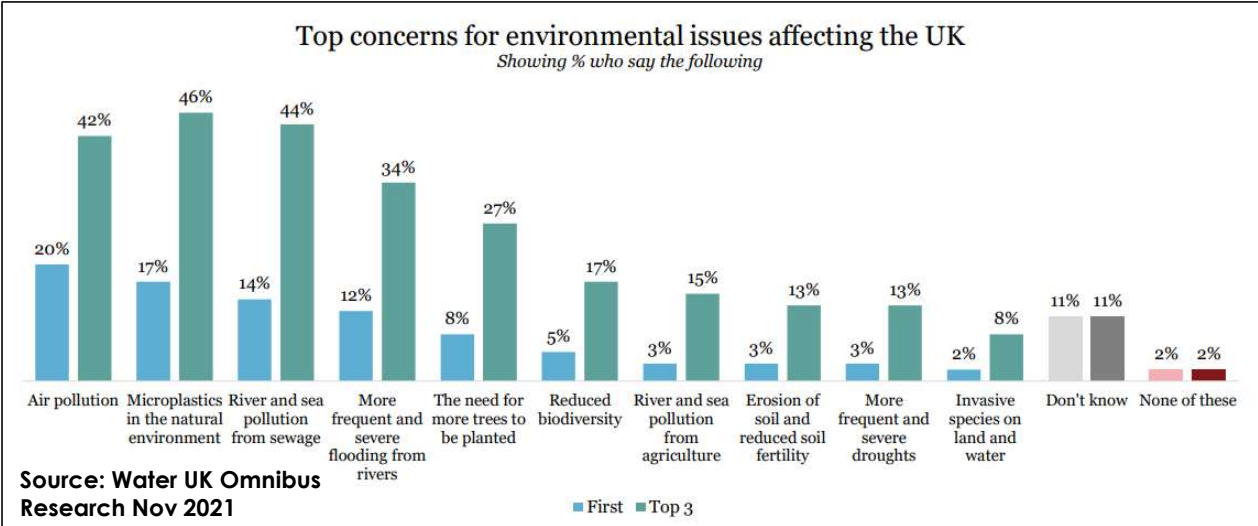
- With reduction of Covid restrictions, public focus was on socialising
- Particularly hot summer, though not record breaking with highest temperature being recorded at 32.2°C at Heathrow

Winter 2021-22

- Price increases felt as fuel prices rise and cold weather hits
- Russia escalates into full invasion of Ukraine with various economic impacts felt around the world
 - Storm Eunice hits UK causing destruction

CSO context

The environment has had a prominent year in the media due to COP26 and IPCC reports. CSOs is not the top concern on the environmental agenda, but has had real prominence, with interest peaking around media coverage (e.g. Environment Bill vote).



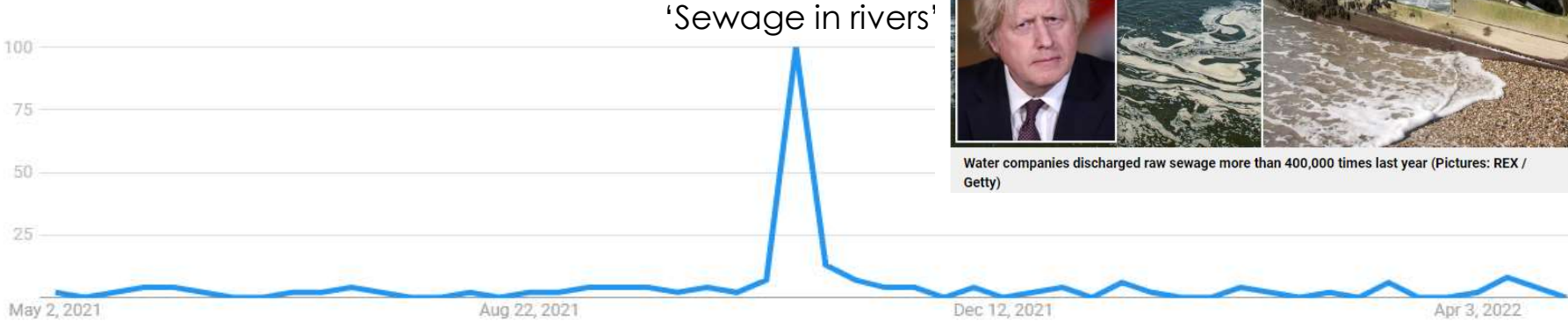
MPs vote to allow water companies to dump raw sewage into rivers and seas

Comment
 Gergana Krasteva
 Monday 25 Oct 2021 4:04 pm

5.2k SHARES



Water companies discharged raw sewage more than 400,000 times last year (Pictures: REX / Getty)

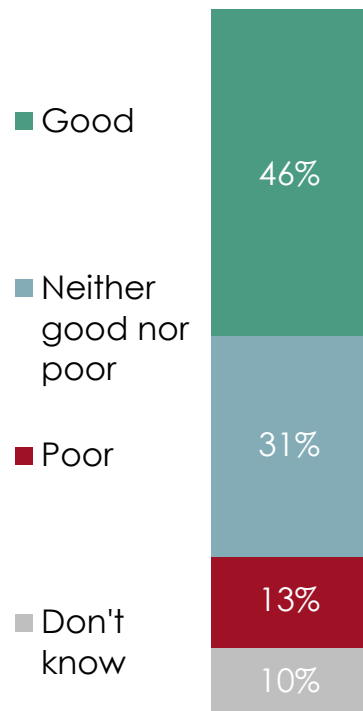
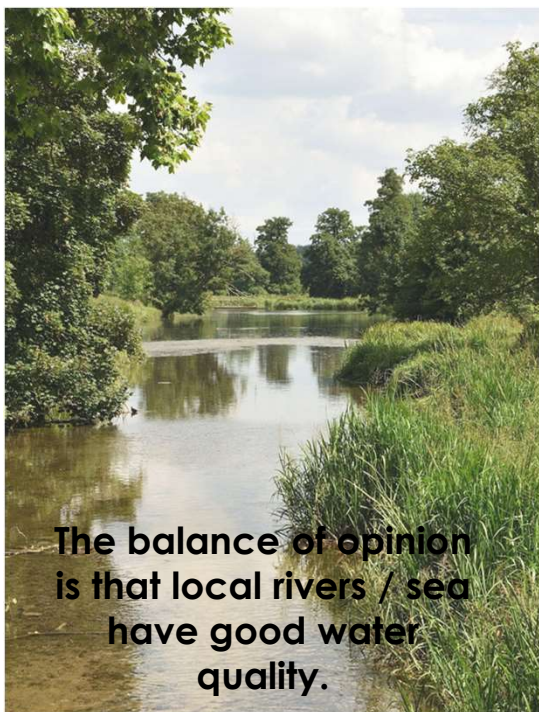


October 24th-October 30th 2021

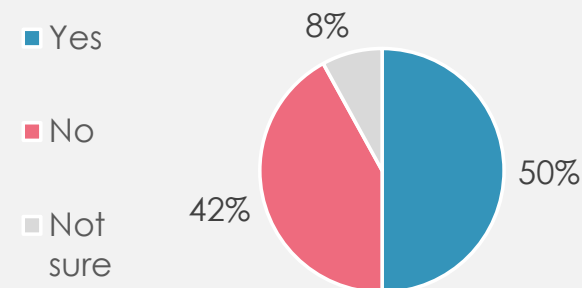
River & sea water quality and awareness of storm overflows (CSOs)

46% think river/sea water in their area is good quality, with only 13% thinking it poor. Meanwhile half claim to be aware of CSO releases, so it's clear that knowing about them doesn't necessarily translate into believing local water quality is poor.

QF1b. Thinking about rivers or the sea in your area – whichever you are most familiar with – what is your impression of the water quality? Base: All respondents 2021/22 (500)



QF1c. Have you heard anything about releases from storm overflows or CSOs into rivers or the sea before? Base: All respondents 2021/22 (500)



Those aware of CSO releases are more likely to:

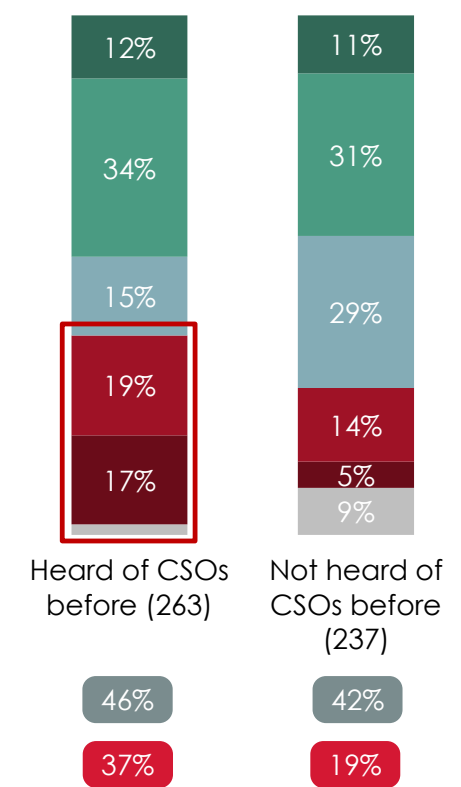
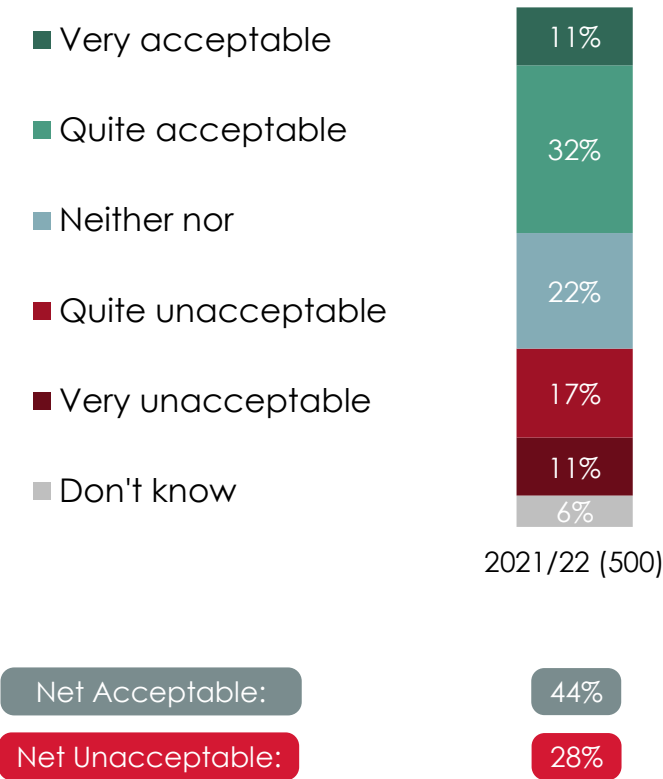
- Be **older, men** and **higher social grade** (not all young activists!)
- Be **'Responsible Citizens'** and **'My World Cost Conscious'**
- Read **local newspapers** and community publications
- **Know about Wessex Water** and have seen them in various media
- Be more **environmentally engaged**, make effort to save water and prioritise local habitats & reducing carbon emissions for Wessex)
- Be **interested in hearing how Wessex protect the environment.**

While they take a dimmer view of CSOs than people who have not previously heard of them, this does NOT mean they have a worse view of Wessex Water – no major detrimental effect on underlying image.

Acceptability of the operation of storm overflows (CSOs)

When presented with an explanation of how and why storm overflows operate, there is divided opinion as to whether storm overflows are acceptable or not: Over 4 in 10 think they are acceptable, but nearly 3 in 10 think they are unacceptable. People who have heard of CSOs before are more likely to think that CSOs are **very** unacceptable.

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?**



Where next on sewer overflows?



A mixed picture – potentially a need for different communications depending on customers' awareness of and engagement with the issue.



- **Those aware of CSOs are interested in hearing from Wessex about what they are doing for the environment, and they welcome engagement on this. Most have broadly goodwill towards the company, but many are actively concerned by CSOs and nearly 4 in 10 do not accept their current mode of operation. They believe something needs to be done.**
 - Be seen to be **doing something** (potentially in broader environmental perspective)
 - Make available the facts where consumer views may be ill-informed / reactionary to media
 - Be **open, honest and transparent**, acknowledging if there have been mistakes



Attitudes to water use and smart metering

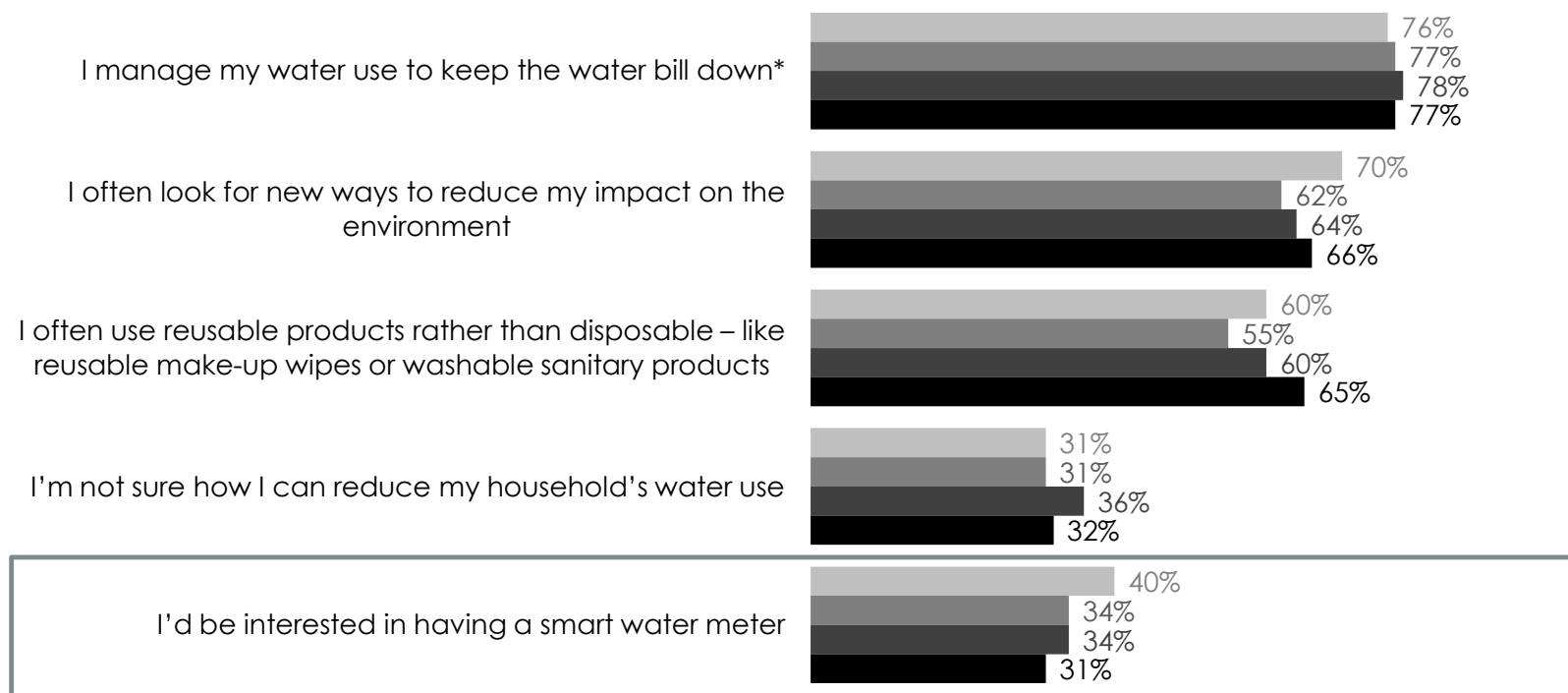
Attitudes to water use and metering



A consistent majority of people with a meter claim to manage water use to keep the bill down – no evidence that broader financial anxieties are prompting more to do this. Limited *uninformed* interest in smart water meters.

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

Base: All respondents



■ Apr-Jun 2021 (250) ■ Jul-Sep 2021 (250) ■ Oct-Dec '21 (250) ■ Jan-Mar '22 (250)

*Base: Respondents with a water meter Q1 (120); Q2 (135); Q3 (136) Q4 (126)



I'd be interested in having a smart water meter



Want to reduce bill by using less water



Not sure how I can reduce water use

Those who agree



- More likely to **have a water meter**
- **Younger**
- **Positive** future outlook
- More open to **online and digital comms** ('digital sharers')
- More likely to agree 'I want to reduce the water bill by using less water' and 'I often look for new ways to reduce my impact on the environment'.

- **Fairly typical** of those with a water meter
- Higher than average **interest in getting a smart meter.**

- More likely to **worry about affordability** and display indicators of **vulnerability**
- Slightly **lower social grade**
- A little more likely to be **single-adult** households

Those who do not agree



- **Less likely to already have a meter**
- **Older** (half > 55)
- **More worried about the future**
- More likely to be 'analogue private'

- **Less worried** about **affording** their bill
- **Less effort** to save water
- Smaller households

- More likely to be 'Responsible Citizens'

Metering and water use – key findings



Interest in smart water meters

- **Uninformed interest** is **limited** – under 4 in 10.
- Interest is related to **economising** and also **environmental engagement**
- Those who are interested embrace online services and data sharing – responsive to **social media** and **digital channels**
- Those who are **less interested** are more 'analogue' - less happy with sharing (and potentially using) data



Want to reduce bill by using less water

- A **high proportion** of customers with a meter (7 in 10) claim to **want to reduce their bill by using less water**
- Those who are **less** motivated, are not so worried about affording their bill, and currently make less effort to save water (tending to have smaller households)
 - The impact of the cost of living crisis on these people is hard to predict



Not sure how to reduce water use

- Some of these **have less capability** to do so due to vulnerabilities, or because they already do not use much water (e.g. single adult households)
- Others will **not have full knowledge** of the range of ways in which they could reduce water use – scope to build awareness

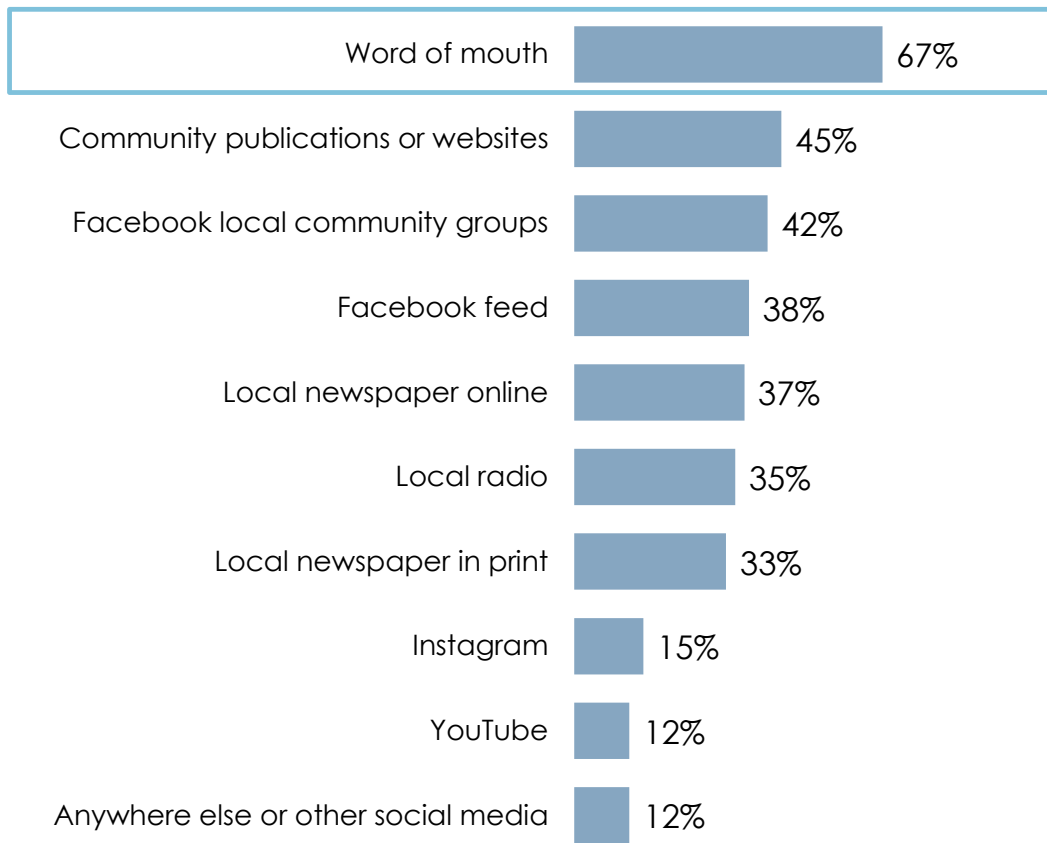
A black faucet is the central focus, with a single drop of water falling from its spout. The background is a soft, out-of-focus bokeh of warm, yellow and white lights. A semi-transparent teal horizontal band is positioned across the middle of the image, containing the word "Communication" in white, bold, sans-serif font.

Communication

Sources of local information and potential messaging

Word of mouth is universally the most widely used source of local information, while the number one topic all customer groups would like to hear from Wessex is alerts about water services.


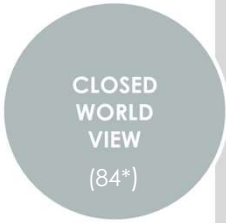




How do you hear about local information or news? % hearing...



Interested in receiving from Wessex Water? % interested...



Beyond using word of mouth and wanting alerts, there are differences

	Which channels for local news?	Which messages from Wessex?		Which channels for local news?	Which messages from Wessex?
 <p>RESPONSIBLE CITIZENS (218)</p>	<p>Average use of channels for local info</p> <p>Most accessible via community publications / websites</p>	<p>High interest in a variety of messages from Wessex.</p>	 <p>CLOSED WORLD VIEW (84*)</p>	<p>Lower use of channels for local info – particularly low for social media</p> <p>Most accessible via mix of local publications, paper and radio</p>	<p>Generally lower interest in hearing from Wessex</p> <p>...but relatively high for:</p> <ul style="list-style-type: none"> • Practical advice • How Wessex are investing in the area
 <p>MY WORLD & COST CONSCIOUS (213)</p>	<p>Widest variety of channels used for local info</p> <p>Most accessible via Facebook local community groups</p>	<p>Highest interest of all in messages from Wessex, particularly:</p> <ul style="list-style-type: none"> • Practical advice • Environment • Community projects & funding support • Recreational sites 	 <p>YOUNG DISCONNECTED (34**)</p>	<p>Lower use of channels for local info – particularly low for social media</p> <p>Most accessible via local radio</p> <p>*CAUTION LOW BASE SIZE</p>	<p>Very little interest in hearing from Wessex</p>
 <p>FAMILY FOCUS (146)</p>	<p>Wide variety of channels used for local info</p> <p>Most accessible via Facebook local community groups</p>	<p>Particular interest in</p> <ul style="list-style-type: none"> • How Wessex are investing in the area • Environment 	 <p>STRETCHED & STRUGGLING (112)</p>	<p>Lower use of all channels than average for local news</p> <p>Most challenging group to reach – local radio is most widely used channel but other approaches needed</p>	<p>Generally lower interest in hearing from Wessex</p> <p>...but relatively high for:</p> <ul style="list-style-type: none"> • Practical advice

NB ALL SEGMENTS HEAR ABOUT LOCAL NEWS THROUGH WORD OF MOUTH AND WANT ALERTS ABOUT WATER SERVICES

Q21: Now thinking more broadly, in general, how do you hear about local information or news in your area? **Q22:** What sort of information would you be interested in receiving from Wessex Water? **Base:** All respondents 2021-2. **Key:** *Low base size; **Very low base size - CAUTION

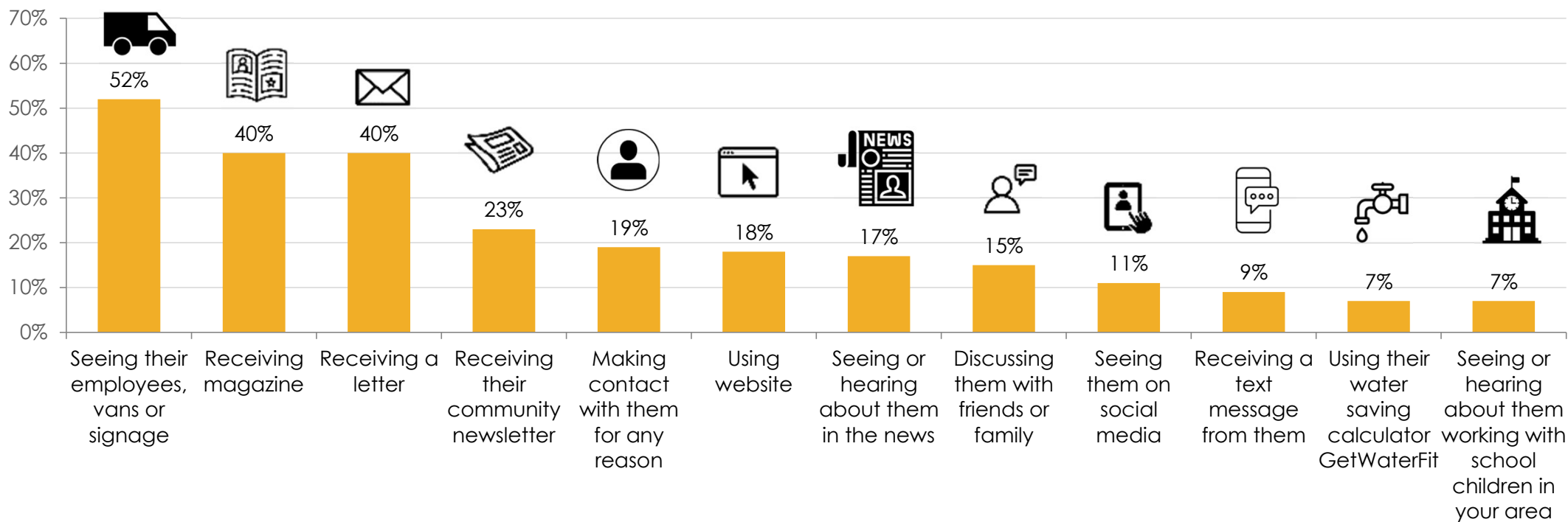
Prompted recall of touchpoints (2021-22)

Wessex Water's presence is primarily expressed through seeing the company 'out and about' – through employees, vans or signage, followed by receiving the magazine, and receiving letters. Notably all of these remain tangible (non digital) activity.

*NB question wording was changed to reflect last 6 months, vs. last year in previous tracking, so not directly comparable with previous data.

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

Base: All respondents 2021-22 (1,000)



Vans, employees and signs are the biggest Wessex Water presence



Followed by the magazine and letters – all 'tangible' brand touchpoints

...looking ahead, there's opportunity to use social media and digital channels for the more 'involved' segments, enabling more relevant messaging. The 'Stretched and Struggling' segment remains a particular challenge: A priority to engage with but less interested in local media channels – they may require more direct interpersonal contact.



Summary

1. The developing cost of living crisis is having unprecedented impact on household outlook

2. So far Wessex have remained 'insulated' from any significant negative perceptions resulting from rising prices elsewhere

3. However, some early signs that water bill affordability anxieties are growing and people are conscious of the need to protect the (financially) vulnerable

4. 'Stretched and Struggling' are falling back again for VFM and affordability ratings after the picture improved in 2020-21, and should be a priority for engaging with

5. Driver analysis reinforces the critical importance of Wessex Water's strong reliability and dependability over the last year....

6. ...and looking forward it underpins the need to push further to demonstrate environmental care and build a positive reputation in the community

7. CSOs is a top of mind environmental issue. It has not fundamentally upset most customers' perceptions of Wessex but they want to see action and transparency

8. More tailored and targeted communications can develop and manage customer relationships - and reach those who find themselves needing assistance

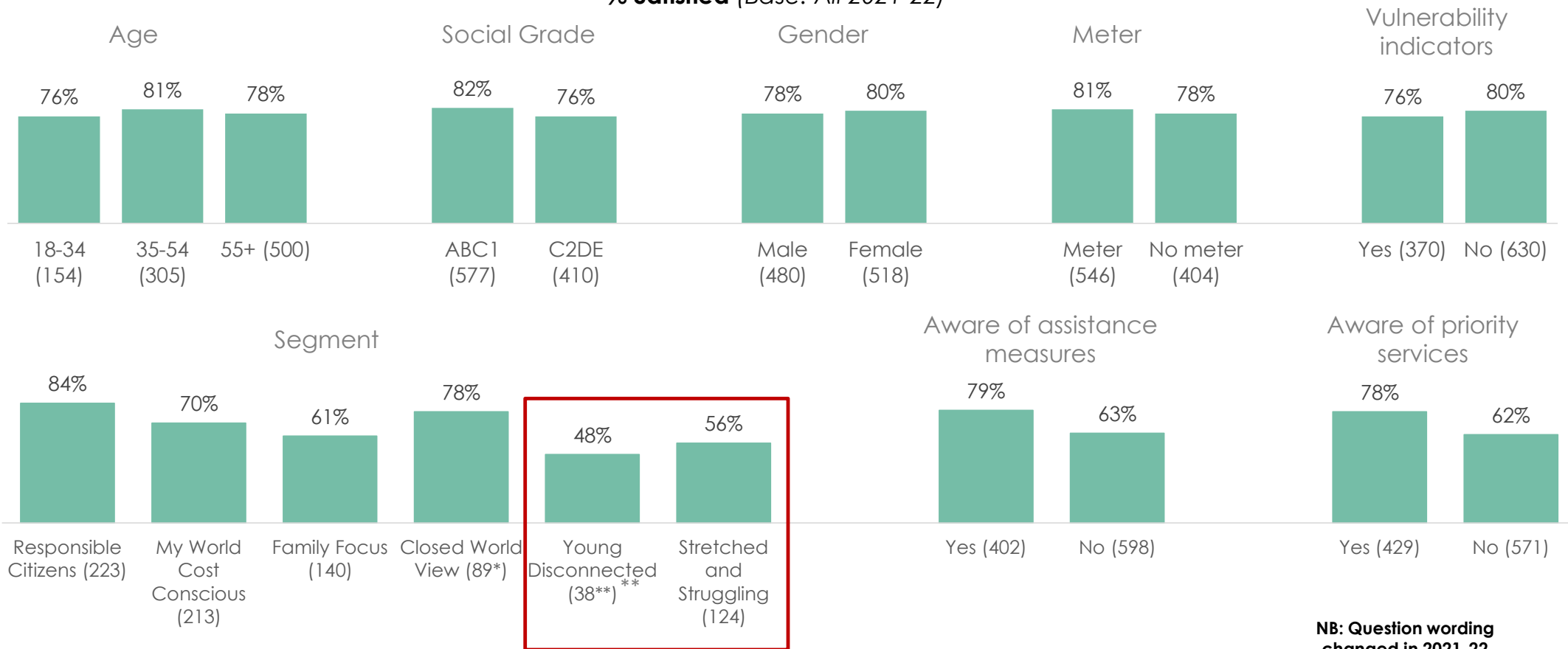


Appendix 1 – subgroup analysis

Overall satisfaction by key groups 2021-22

Satisfaction is reasonably consistent across demographic groups, those with and without a meter, and those with and without vulnerability indicators. 'Stretched and struggling' and 'Young Disconnected' segments are those where most attention is needed to try and build satisfaction.

Q15 Taking everything into account how satisfied are you with Wessex Water?
 % Satisfied (Base: All 2021-22)



NB: Question wording changed in 2021-22

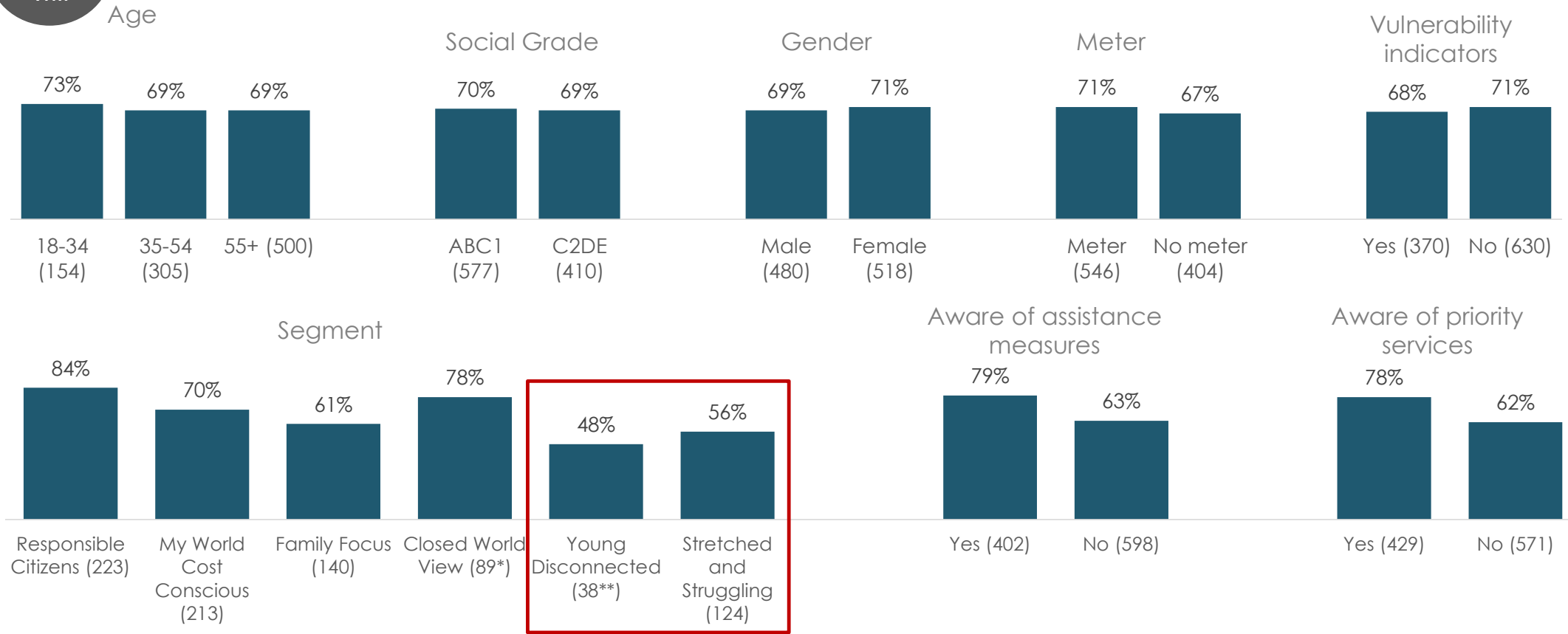
KEY: * Caution low base size ** Caution very low base size.

Value for money by key groups 2021-22

Responsible Citizens have the most favourable view of value for money, whereas Stretched and Struggling and Young Disconnected are not as positive. Being aware of support appears to boost value for money perceptions.



Q16. Thinking now about value for money, how satisfied or dissatisfied are you with the value for money of the water and sewerage services in your area? Base: All 2021-22
% Very or fairly satisfied



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

Wessex Water priorities by segment 2021-22

	TOTAL (1,000)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84*)	Young Disconnected (34**)	Stretched & Struggling (112)
Ensuring a reliable water supply	9.3	9.7	9.4	9.1	9.6	9.1	9.0
Preventing sewage leaks into / entering rivers and the environment ⁽¹⁾	9.0	9.5	9.2	8.8	9.3	8.7	8.8
Giving great customer service	8.8	9.2	9.0	8.6	9.0	8.4	8.3
Investing to address future extremes in weather like drought and flooding	8.5	9.0	8.8	8.2	8.7	8.5	8.1
Improving local habitats for plants and animals	8.1	8.5	8.3	7.5	8.1	7.7	7.7
Reducing their own carbon emissions	8.1	8.4	8.4	7.6	8.1	7.7	7.7
Supporting customers who struggle to pay their bills	8.1	8.2	8.4	7.6	8.0	7.5	8.0
Being innovative and quick to launch new technologies	7.6	8.1	7.9	6.9	7.7	7.2	7.5
Promoting social equality and equal opportunities	7.5	7.7	8.1	6.7	6.9	6.6	7.0
Working in communities - for example volunteering	7.1	7.3	7.7	6.5	6.7	6.2	6.7

(1) New wording introduced part way through Quarter 3 fieldwork.

0.5+ ABOVE TOTAL

0.4 ABOVE TOTAL

WITHIN +/-0.3 OF
TOTAL

0.4 BELOW TOTAL

0.5+ BELOW TOTAL

Q7. How important do you think it is for Wessex Water to focus on each of the following things?
Mean score (10 = 'a top priority' 0 = 'not a priority'). Base: All respondents 2021/22

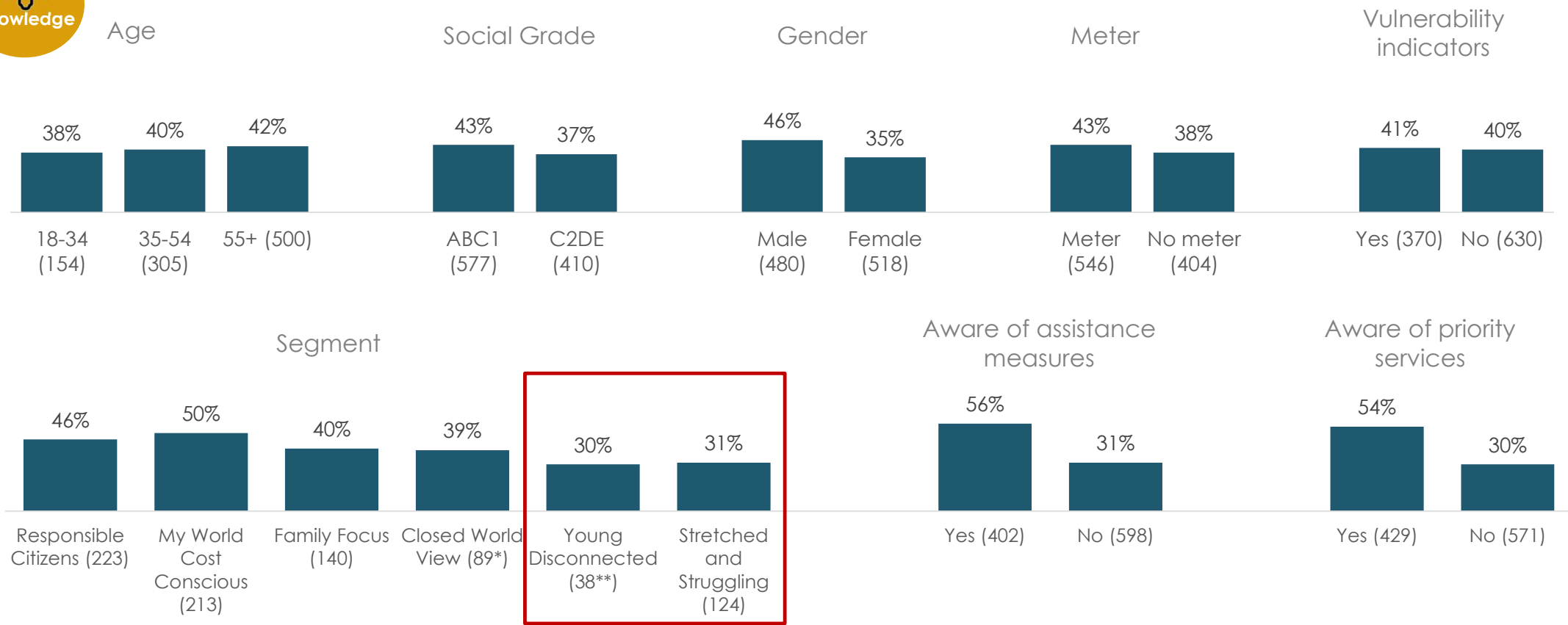
KEY: * Caution low base size ** Caution very low base size.

Knowledge by key groups 2021-22

Across the board there is a large opportunity to grow knowledge about Wessex Water and what they do. There is a notably variation in knowledge between different segments – under one third of ‘Young Disconnected’ and ‘Stretched and Struggling’ feel that they know about Wessex Water. This is the first hurdle to building a relationship with them.



Q6 How much do you feel you know about Wessex Water and what they do? (Base: All 2021-22)
 % Know a lot or a fair amount



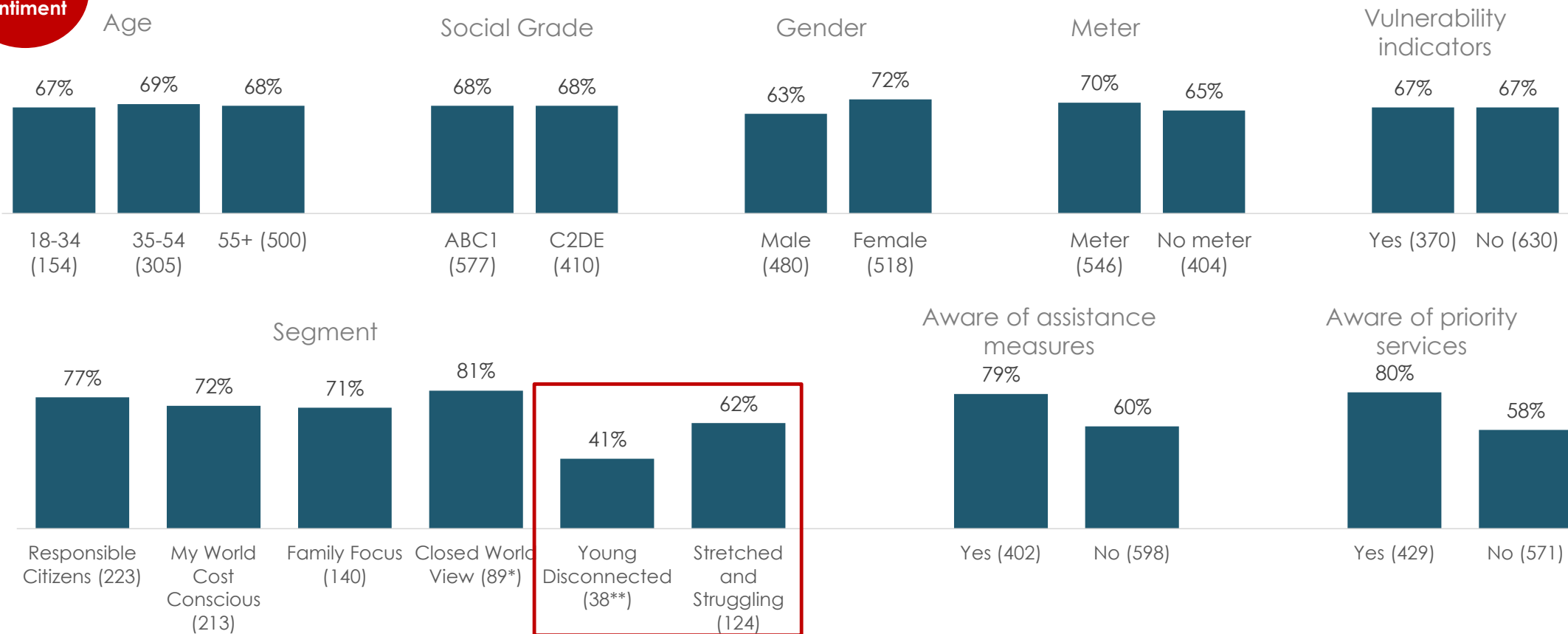
KEY: * Caution low base size ** Caution very low base size.

Sentiment by key groups 2021-22

Sentiment towards Wessex Water is much stronger for those aware of assistance and priority measures. There is also a noticeable difference between certain segments (attention needed for 'Stretched & Struggling and 'Young Disconnected' segments).



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



Wessex Water imagery by segment 2021-22

Indications that Responsible Citizens are above average for rating Wessex Water as providing exceptional service, and actively caring about them and their community. Stretched and Struggling however do not have this strength of association – they are slightly less inclined to think Wessex provide exceptional service and care – although they are not dramatically adrift of other segments.

	TOTAL (1000)	Responsible Citizens (223)	My World and Cost Conscious (213)	Family Focus (140)	Closed World View (89*)	Young Disconnected (38**)	Stretched & Struggling (124)
Provide exceptional service	68%	75%	73%	64%	73%	52%	62%
They are easy to contact	62%	66%	66%	67%	67%	51%	60%
Fix any problems	61%	63%	67%	62%	60%	50%	58%
Care about the environment	58%	57%	60%	59%	64%	50%	55%
They are well regarded in your community	54%	54%	60%	55%	51%	37%	51%
Care about you and your community	53%	60%	54%	54%	55%	41%	47%
An open and transparent company	52%	54%	55%	51%	54%	45%	57%
A responsible and ethical company that does the right thing	52%	54%	55%	52%	57%	43%	50%
Innovative and technologically advanced	45%	44%	47%	47%	45%	39%	43%

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)

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

Wessex Water performance by segment 2021-22

Responsible Citizens are likely to have a high view of Wessex Water's performance in nearly all areas. This is in contrast to the Stretched and Struggling group who rate Wessex Water's performance notably lower in most areas.

	TOTAL (1000)	Responsible Citizens (223)	My World and Cost Conscious (213)	Family Focus (140)	Closed World View (89*)	Young Disconnected (38**)	Stretched & Struggling (124)
Making it straightforward for you to pay your bill in the way you prefer (bill payers only)	88%	94%	90%	84%	90%	77%	80%
Reliability of their services	82%	91%	84%	82%	84%	71%	74%
Providing clear and easy to understand information	75%	86%	77%	72%	84%	66%	69%
Making it easy for you to deal with them	68%	75%	70%	68%	73%	60%	73%
The range of methods through which you can contact them	67%	73%	71%	67%	75%	60%	66%
Keeping you up to date with their work in your area	67%	77%	70%	60%	74%	53%	61%
Helping you to save water (Wessex supply area only)	59%	65%	65%	57%	66%	39%	52%
Helping you to prevent sewer blockages	48%	52%	52%	43%	46%	39%	48%

9% + ABOVE TOTAL

6-8% ABOVE TOTAL

WITHIN +/-5% OF
TOTAL

6-8% BELOW TOTAL

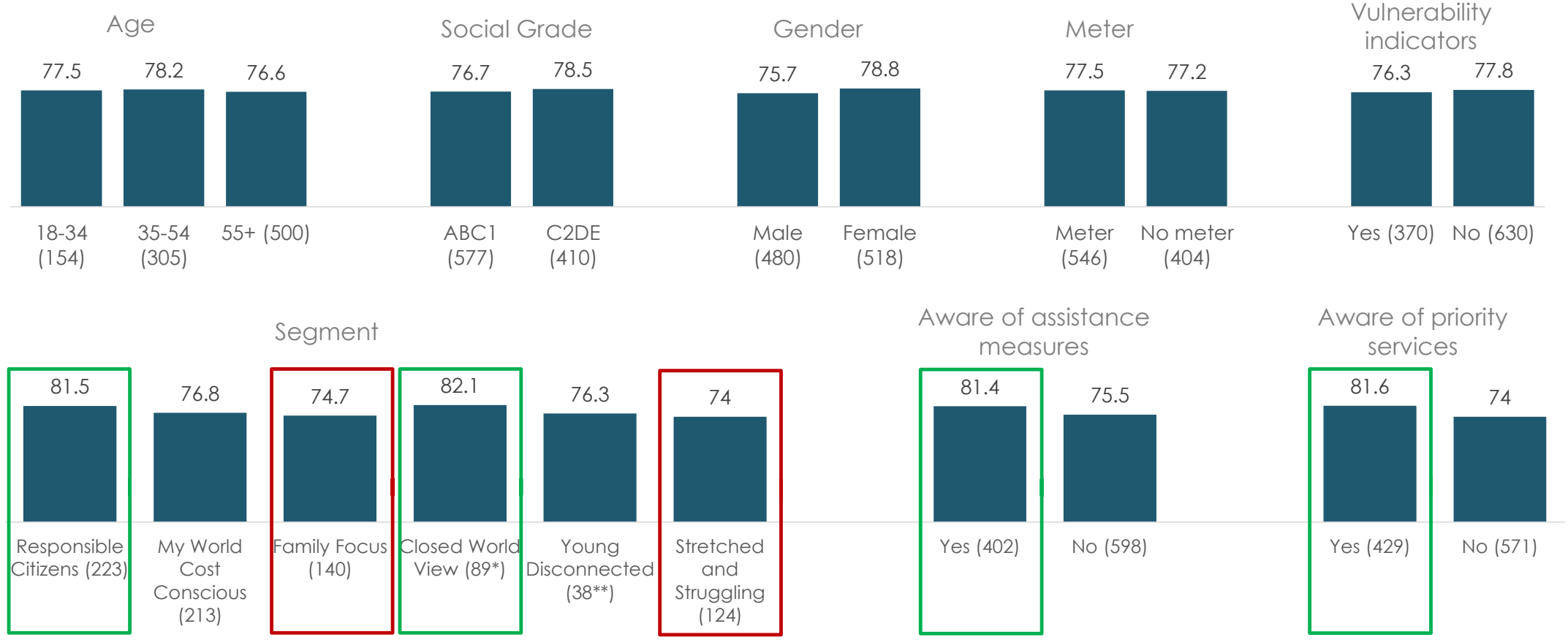
9% + BELOW TOTAL



Trust is reasonably consistent amongst demographic groups, although varies by segment - greatest scope to improve for 'Stretched & Struggling' (particularly in the dimension of reliability and dependability) and 'Family Focus'. Awareness of assistance and priority services is positively related to trust.

Overall Trust Index: 77.3

TRUST INDEX (Base: All 2021-22)
Score out of 100



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

How hear about local information or news by segment 2021-22

Responsible Citizens, My World Cost Conscious and Family Focus are all more attuned to local events through a range of media channels, notably Facebook local community groups and Facebook feeds. Meanwhile the other segments are much less likely to use social media for local information.

	TOTAL (1000)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84)	Young Disconnected (34**)	Stretched & Struggling (112)
Word of mouth	67%	69%	68%	67%	67%	62%	62%
Community publications or websites	45%	53%	51%	50%	38%	37%	29%
Facebook local community groups	42%	46%	54%	54%	14%	9%	19%
Facebook feed	38%	39%	48%	43%	9%	20%	22%
Local newspaper online	37%	34%	45%	43%	36%	33%	26%
Local radio	35%	31%	36%	31%	37%	41%	33%
Local newspaper in print	33%	30%	36%	35%	32%	21%	23%
Instagram	15%	11%	20%	12%	2%	-	7%
YouTube	12%	9%	19%	9%	2%	4%	5%
Anywhere else on social media	12%	14%	17%	6%	7%	11%	10%
AVERAGE NO. OF LOCAL SOURCES	3.4	3.4	3.9	3.5	2.4	2.4	2.4

9% + ABOVE TOTAL

6-8% ABOVE TOTAL

WITHIN +/-5% OF
TOTAL

6-8% BELOW TOTAL

9% + BELOW TOTAL

Information interested in receiving by segment 2021-22

My World Cost Conscious in particular have a Disconnected bigger and more varied appetite for information from Wessex Water, and Responsible Citizens are also more interested than average. Young Disconnected and Stretched and Struggling generally have less interest.

	TOTAL (1000)	Responsible Citizens (218)	My World and Cost Conscious (213)	Family Focus (146)	Closed World View (84)	Young Disconnected (34*)	Stretched & Struggling (112)
Alerts about water services in your area	75%	82%	85%	78%	71%	54%	69%
How they are protecting the environment	68%	74%	83%	73%	65%	38%	51%
Practical advice like water saving, cold weather advice and preventing sewer blockages	64%	70%	75%	64%	64%	38%	63%
How they are investing in your area	65%	71%	76%	73%	63%	33%	48%
Community projects they are funding	52%	62%	65%	51%	43%	25%	30%
Recreational activities at their local sites e.g. reservoirs	47%	54%	60%	48%	38%	22%	32%
How to get community funding support from Wessex Water	36%	32%	48%	33%	19%	17%	27%
Information about jobs and opportunities at Wessex Water	27%	21%	36%	25%	12%	14%	20%

9% + ABOVE TOTAL

6-8% ABOVE TOTAL

WITHIN +/-5% OF
TOTAL

6-8% BELOW TOTAL

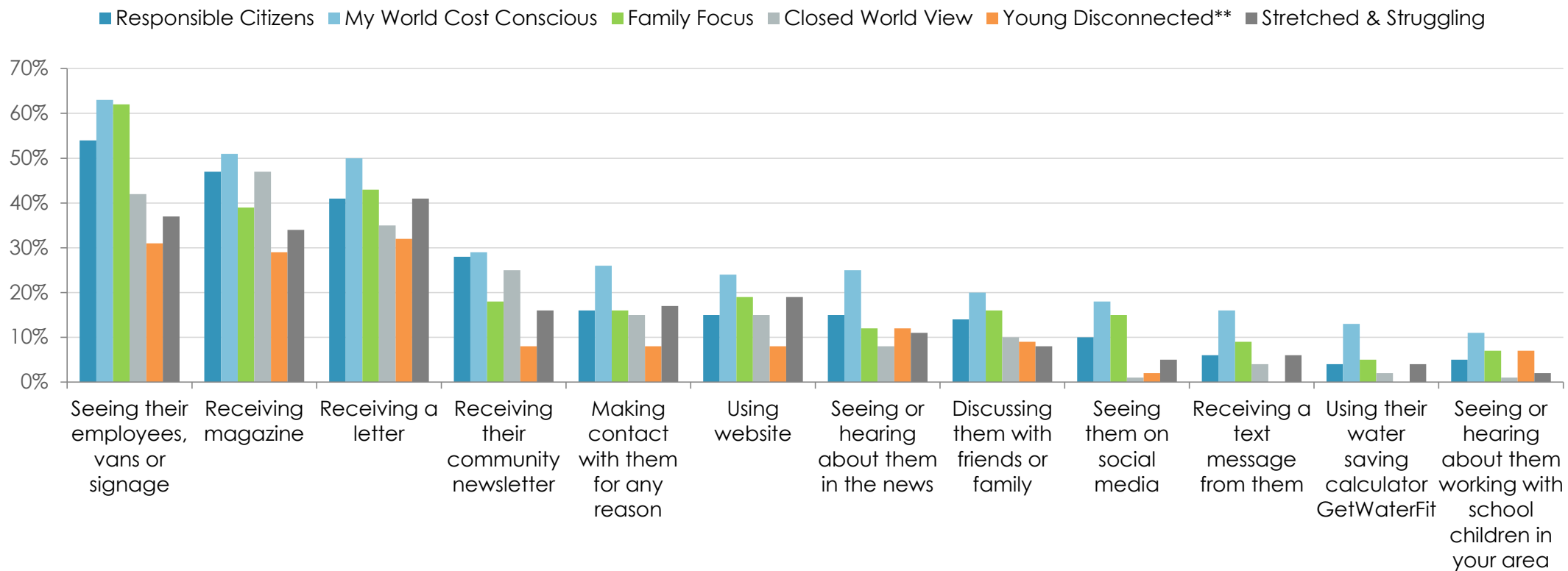
9% + BELOW TOTAL

Prompted recall of Wessex touchpoints by segment (2021-22)

'My World Cost Conscious' are notably high in recalling Wessex Water communications across the board. 'Closed World View' relatively receptive to the magazines and community newsletters. 'Stretched and Struggling' have relatively high use of the website, but less likely than most to recall seeing Wessex Water presence outdoors, or receiving the magazine (low general involvement).

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

Base: All respondents 2021-22 in each segment





Appendix 2 – segment profile update 2021-2

Segment profile 2021-2

HOW DEFINED?

SIZE









	1. Responsible Citizens	2. My World & Cost Conscious	3. Family Focus	4. Closed World View	5. Young Disconnected*	6. Stretched & Struggling
Water saving	HIGH	HIGH	LOW	HIGH	LOW	HIGH OR LOW
Community	HIGH	HIGH	HIGH	LOW	LOW	LOW
Bill affordability	HIGH	LOW	HIGH OR LOW	HIGH	HIGH	LOW
Proportion of Wessex Water bill payers	27%	26%	17%	10%	5%	15%

DEMOGRAPHICS

PROFILING

RELATIONSHIP WITH WESSEX

WIDER ATTITUDES

Age (above average for)	55+	35-64	25-34	65+	25-34	35-54
Gender Female: Male	51:49	54:46 	51:49	49:51	47:53 	48:52
Social Grade (above average for)	AB	Average	C2	DE	DE	DE
Vulnerability	26%	46% (highest)	33%	33%	40%	36%
Have meter (based on those who know if they do or not)	58%	63%	51%	61%	58%	58%
VFM	84% 	70%	61%	78%	48% 	56% 
Very satisfied	49% 	42%	42%	51% 	42%	37% 
Recall magazine	47%	51% (highest)	39%	47%	29% (low)	34% (low)
Contact	16%	26% (highest)	16%	15%	8% (lowest)	17%
Environmentally minded (9 or 10)	48% (high)	48% (high)	22%	26%	17% (lowest)	22%
'More online services better' (rate 9 or 10)	44%	42%	34%	36%-	37%	25% (lowest)

% of Wessex Water customers (bill payers) in each segment

Segment	2017-18, 2018-19 & 2019-20 (Pre-Covid)	2020-21 (Covid)	2021-22
Responsible Citizens	32%	27%	27%
My World Cost Conscious	22%	26%	26%
Family Focus	19%	18%	17%
Closed World View	8%	11%	10%
Young Disconnected	4%	4%	5%
Stretched and Struggling	15%	13%	15%



Responsible Citizens



Responsible Citizen segment reduced in size post-Covid. Upheaval in personal financial situations and changing involvement in the community likely to have resulted in some individuals moving segments



My World Cost Conscious



My World Cost Conscious segment grew the most post-Covid – indicating that some Responsible Citizens may have become less confident about bills over this period, transferring to this segment



Family Focus



Closed World View



Closed World View segment has grown slightly post-Covid and has become slightly older in profile



Young Disconnected



Stretched and Struggling



Appendix 3 – Bill payers and non-bill payers 2021-2

Bill payers versus non-bill payers: Awareness and attitudes 2021-22

	Total (1,000)	Bill payers (827)	Non bill payers (173)
DON'T KNOW who provides water	13%	9%	31%
Awareness that Wessex provides sewerage service	61%	67%	38%
Satisfied (7-10)	79%	81%	70%
Positive sentiment to Wessex (7-10)	67%	71%	52%
Know a lot / a fair amount about Wessex	40%	42%	34%
<p>Priorities Non bill payers lower ratings in general except for: Helping customers who struggle to pay their bill, reducing carbon emissions; being innovative; promoting social equality; working in communities</p>			
<p>Image statements Non-bill payers lower for 'They are easy to contact'</p>			
<p>Performance statements Non-bill payers lower rating in general except for: Keeping you up to date; Helping you to prevent sewer blockage; Helping you to save water</p>			
Agree charges acceptable	65%	69%	51%
Aware of bill assistance	40%	41%	35%
Aware of PSR	42%	45%	30%
<p>Information interested in receiving from Wessex: Non bill payers lower for alerts; practical advice; how they are protecting the environment. Higher for 'how to get community funding support' and 'info about jobs and opportunities at Wessex'.</p>			

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS

Bill payers versus non-bill payers: Touchpoints and demographics 2021-22

	Total (1,000)	Bill payers (827)	Non bill payers (173)
How hear about local info: Non bill payers higher for: Facebook feed; Facebook local community groups; Instagram; You Tube			
Made contact with Wessex for any reason in last 6 months?	19%	18%	21%
Used Wessex website in last 6 months?	18%	18%	16%
Recall receiving magazine in last 6 months?	40%	44%	27%
Recall seeing or hearing about Wessex in the news	17%	16%	21%
Happy to share personal data to get better service (agree)	48%	48%	51%
Agree 'the more services I can access online the better'	66%	65%	71%
Agree 'I'd be interested in having a smart water meter'	35%	34%	35%
Agree 'I often look for new ways to reduce my impact on the environment'	65%	67%	60%
Social Grade: ABC1	58%	58%	57%
Social Grade: C2DE	41%	41%	40%
18-34 years old	25%	19%	47%
35-54	30%	30%	28%
55+	41%	46%	22%

SIGNIFICANTLY HIGHER THAN BILL PAYERS

SIGNIFICANTLY LOWER THAN BILL PAYERS



Appendix 4 – Key Driver Analysis Detail

Key driver analysis 2021-22

Scope of the analysis

Wessex Water asked Blue Marble to conduct a key driver analysis using the first year of data for the revised tracking survey (2021-2) on two measures:

- Overall satisfaction with Wessex Water (Q11)
- Sentiment associated with Wessex Water (Q4)

There were no a priori assumptions about which variables were likely to be the drivers. Almost all questions were entered at the start of the linear regression modelling and those with low associations were removed step by step until only those with a strong independent link remained

Mixed method data

The survey is mixed method: CATI and CAWI and it is evident that there is method bias in answers to some questions. The modelling was therefore run three times: separately for CATI and CAWI and then a single model for the total sample. The ideal was a single model that was appropriate for both methods. However, the modelling was started on the assumption that separate models were going to be needed. Only once the process had been completed separately for the two methods was an assessment made on whether a single model was feasible

Variables included

Qs 2, 6, 7, 8, 13, 18, 19, 20, 21, 22, 23, 24, 26, 27, F1, F2, F3, F4, F5

- Note Q19/20 was simplified to binary variables – yes v other

A separate assessment was made of questions directed to bill payers only: Q13r1, 15, 16, 17, Separate runs were also made for the rotating section: F1 r5, 6, 7, F1b, c, d

Analysis of 'don't know'

Initial modelling was run excluding 'don't knows' from scale questions. However, this reduced the available sample and removed respondents who otherwise had given perfectly acceptable responses. Consequently 'don't know' answers to scale questions were replaced with the median rating. This did not affect the variables that came to the fore and created a stronger model (more variance explained) due to the larger sample size

Notes on additional runs

A separate assessment was made of questions directed to bill payers only: Q13r1, 15, 16, 17

- **Q16 – value for money** was a strong predictor of satisfaction / sentiment for Q11
- However, this largely overrode the contribution of Q18
- Adding it improved the amount of variance explained to 57% but this is not a substantial increase and it meant that the modelling would have to be based on the sub-sample of bill payers only. This was a decrease to the value of the model and the decision was made to not add this variable

Separate runs were also made for the rotating section F1 r5, 6, 7, F1b, c, d

- None of these added any value to the model for Q11 (satisfaction)
- F1c releases from storm overflows or CSOs into rivers or the sea added to Q4 (sentiment) by increasing the amount of variance explained from 43% to 46%. However, as the modelling would therefore have to be based on only half the sample, this was not thought to be a worthwhile step. Those aware of CSOs had a lower sentiment score at Q4.



Which measures in the tracker, if any, are statistically linked to higher / lower satisfaction (implicit drivers)?

Objective

Method

Data from the **last full year (2021-2)** of the tracking survey was used in a **linear regression** key driver analysis. Analysis was performed independently for online and telephone interviews, and then combined, to explain what drives satisfaction overall.

Key results

1

Satisfaction is, as we might expect, strongly related to value for money amongst bill payers.

For the final analysis, we removed the value for money variable, along with sentiment to Wessex, to isolate other, actionable variables that drive satisfaction.

2

In the final analysis 6 variables make up the strongest factor driving satisfaction:

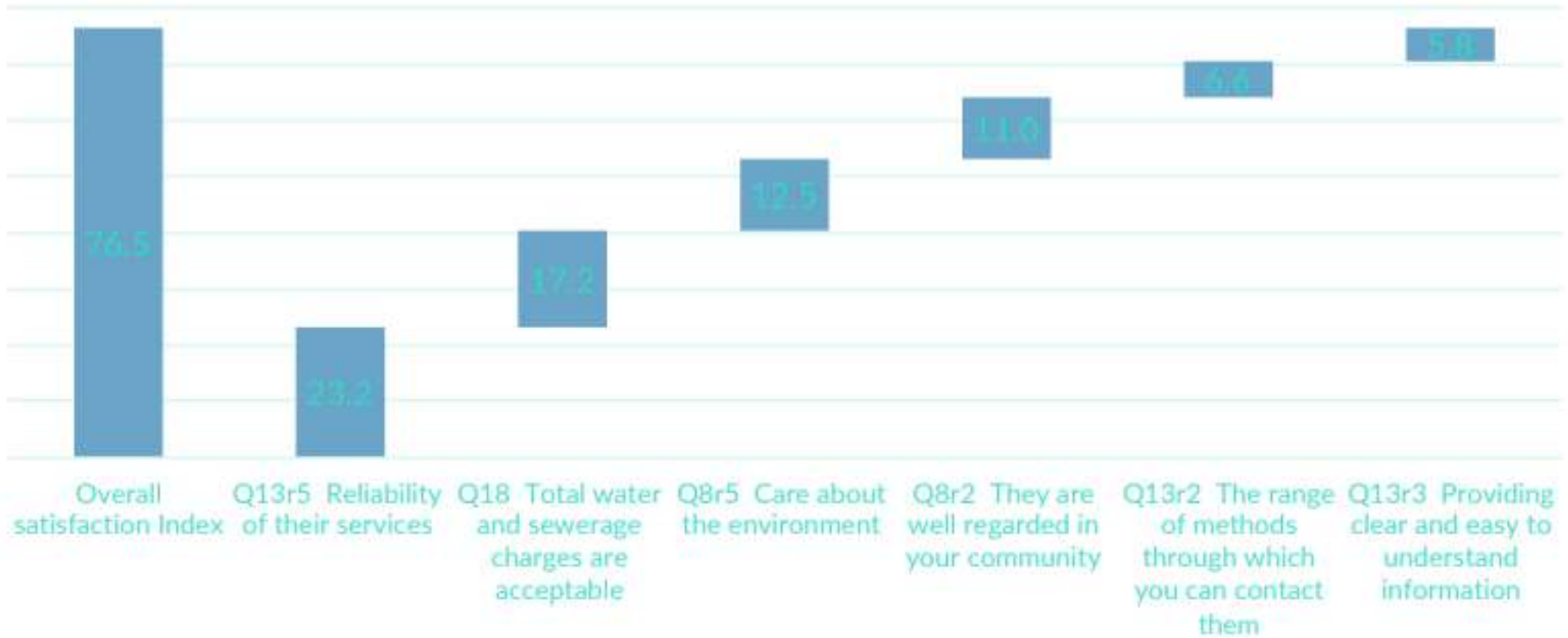
- 1 'Reliability of their services'
- 2 'Water & sewerage charges acceptable'
- 3 'Care about the environment'
- 4 'Well regarded in community'
- 5 'Range of methods can contact them'
- 6 'Provide clear & easy information'

More influence

In total these account for 50% of the variance of 'satisfaction'

Take out

Along with the pre-requisite needs to feel satisfied with the value offered by Wessex Water, reliability of services is critical for satisfaction. Beyond these are a combination of more emotive drivers ('care about the environment' and 'well regarded in the community') plus more rational drivers 'range of methods through which you can contact them' and 'providing clear and easy to understand information'.



Objective



Which measures in the tracker, if any, are statistically linked to positive / negative sentiment to Wessex (implicit drivers)?

Method

Data from the **last full year (2021-2)** of the tracking survey was used in a **linear regression** key driver analysis. Analysis was performed independently for online and telephone interviews, and then combined, to explain what drives sentiment overall.

Key results

1

Sentiment is, as we might expect, strongly related to value for money amongst bill payers.

For the final analysis, we removed the value for money variable, along with overall satisfaction with Wessex Water, to isolate other, actionable variables that drive sentiment to Wessex Water.

2

In the final analysis 7 variables make up the strongest factor driving sentiment:

1. How much feel know about Wessex
2. 'Water & sewerage charges acceptable'
3. 'Well regarded in community'
4. 'Reliability of their services'
5. 'Open and transparent company'
6. 'Making it easy for you to deal with them'
7. 'Provide clear and easy information'

More influence

In total these account for 43% of the variance of 'sentiment'

Take out

Sentiment is notably driven by **knowledge** of Wessex. This enforces how engagement is key to building a positive feeling about the brand, through increasing knowledge and familiarity. In addition, corporate **transparency** is an underlying driver influencing positivity (which is not present for the key drivers of satisfaction).



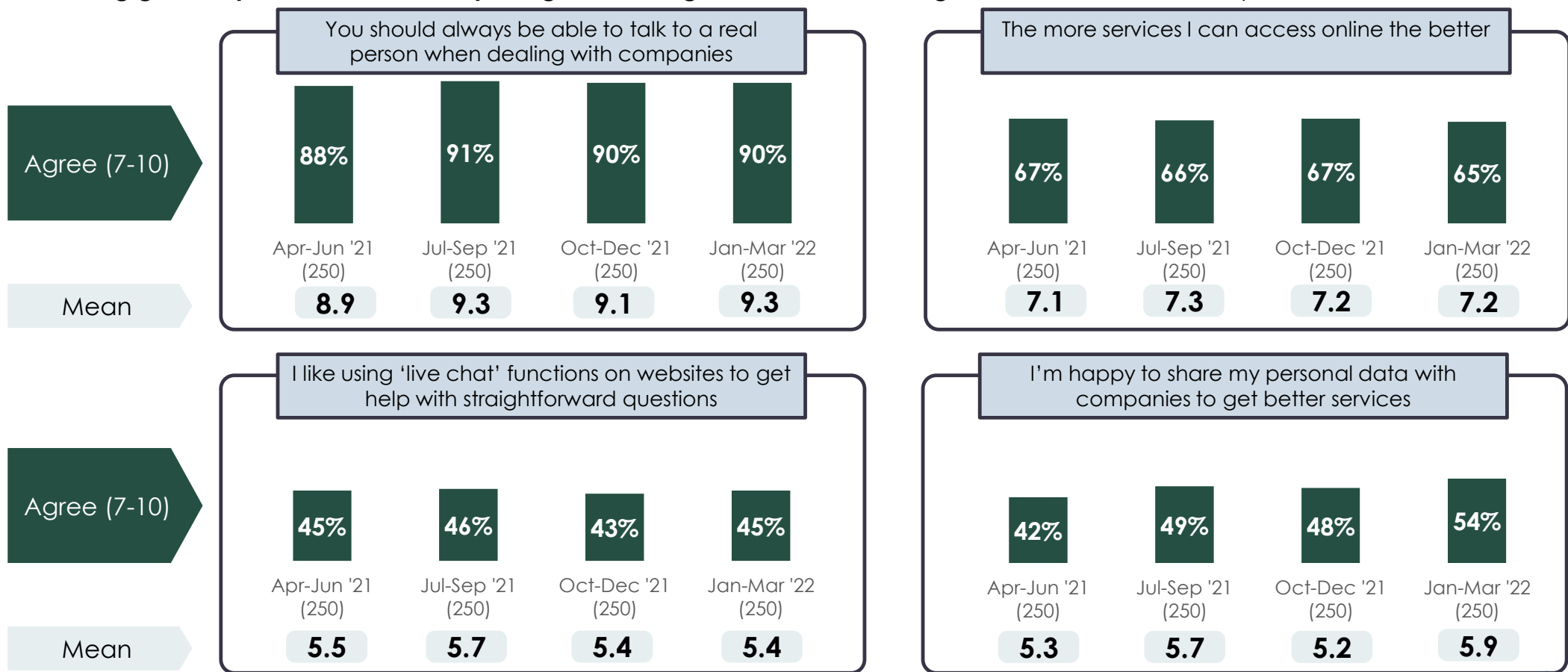


Appendix 5 – Attitudes to interaction

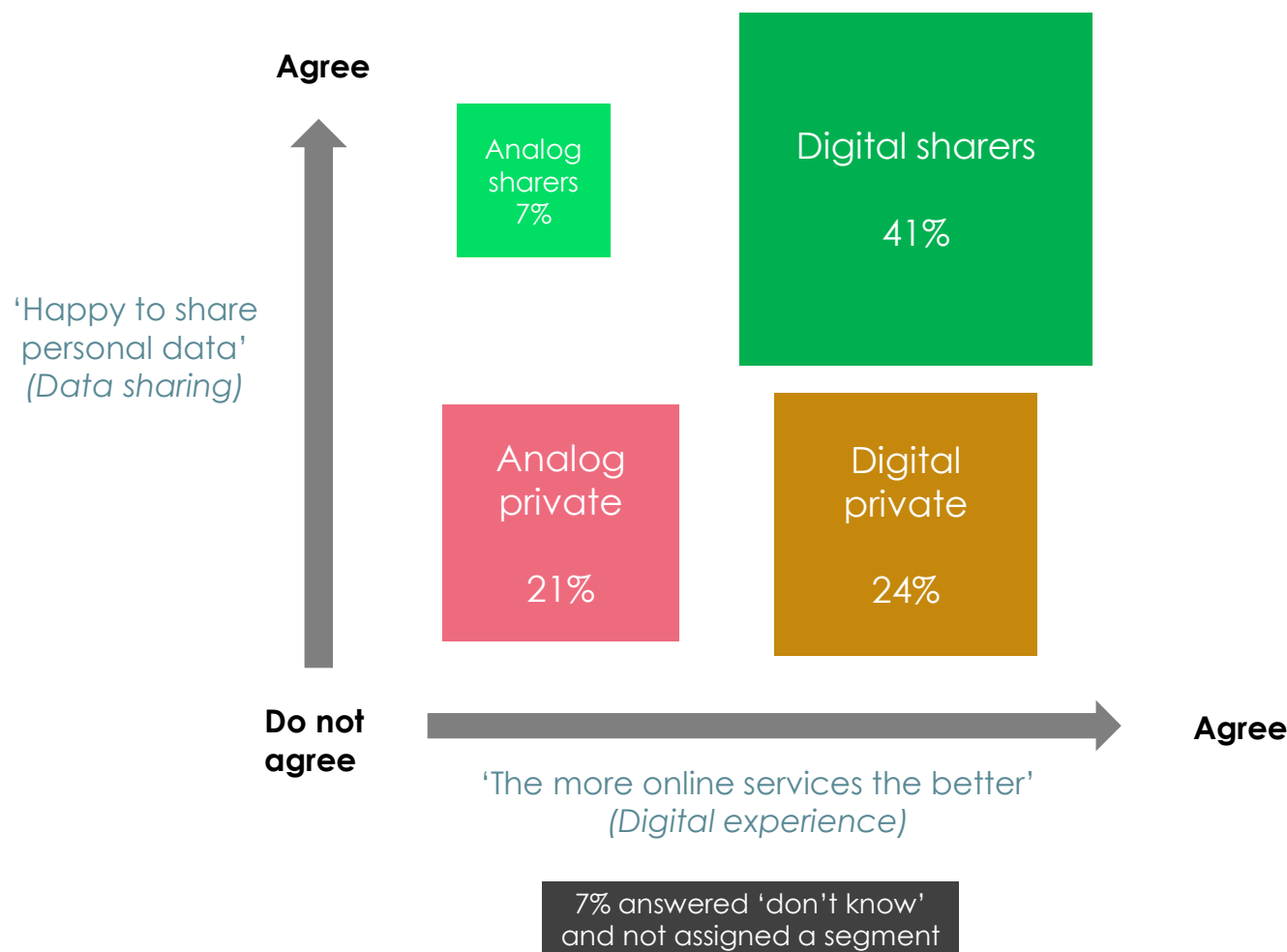
Attitudes to interaction 2021-22

Even though there's interest in receiving alerts about water services, many people remain reticent about sharing their personal data with companies – although signs of a gradual shift to be more amenable to this to get better services .

Q24. Thinking generally, how much would you agree or disagree with the following statements? Base: All respondents



Using two questions we are able to construct a simple segmentation of Wessex Water consumers by their attitudes to digital transactions.



The segmentation helps understand the distribution of the consumer base in terms of the kind of relationship they are ready to have with Wessex Water:

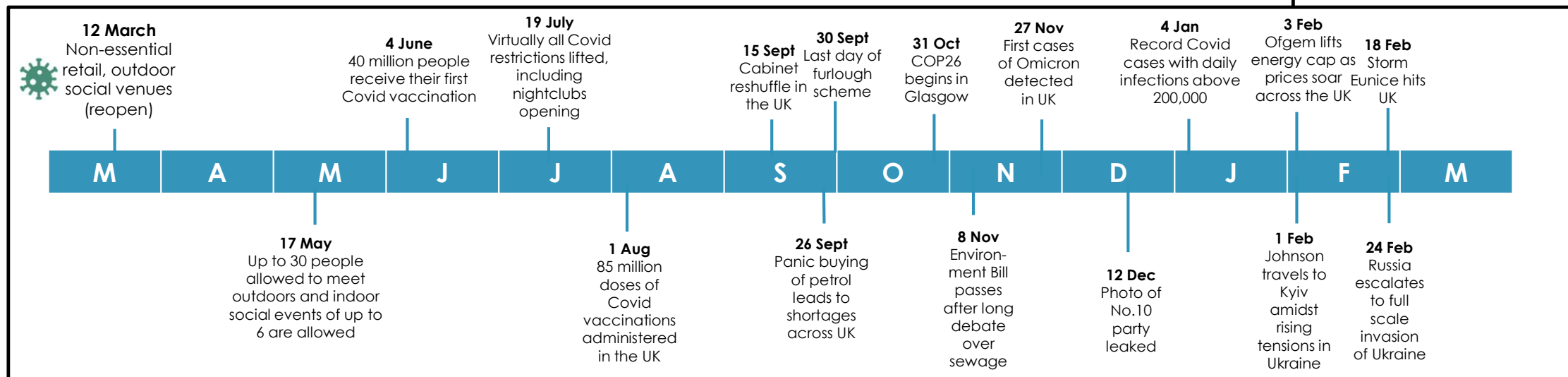
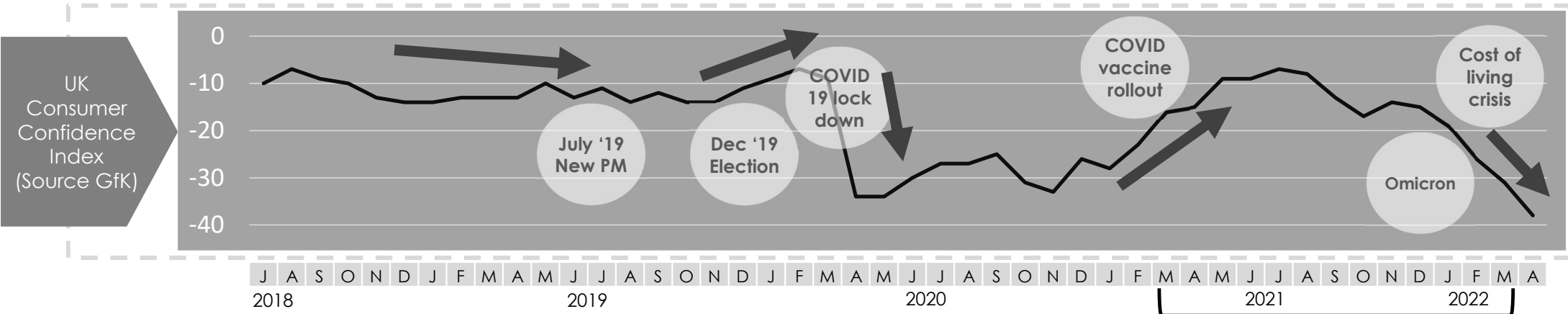
- 4 in 10 are responsive to open, two-way digital engagement and conversations, more interested in being 'in touch' and very comfortable with data and personalised transactions on digital channels; younger & particularly interested in smart water meters.
- Around 1 in 4 expect and appreciate digital channels and services but are likely to want more 'arm's length' / one-way communication and are more protective of their personal data; more likely to be women
- Around 2 in 10 are 'traditionally minded' – best approached in ways other than digital channels; tend to be older
- A small minority are currently more comfortable with non-digital channels but happy in principle to share their data – they may be more digitally excluded and require support to be able to transact in more ways



Appendix 6 – Finances and support: Long term trends

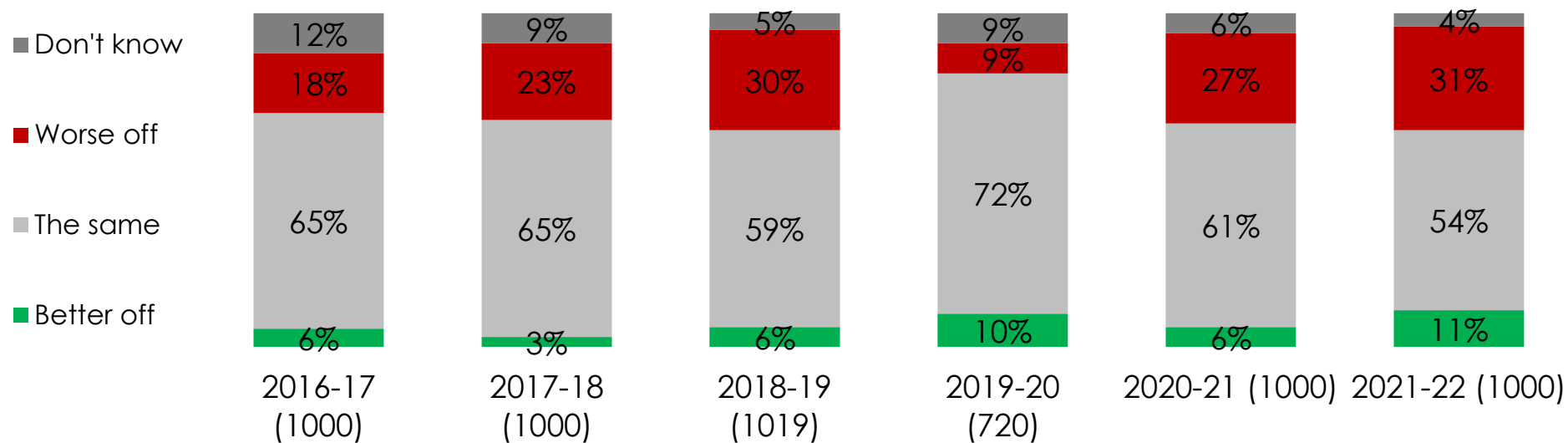
By April 2022 consumer confidence is at a near-historic low point.

After rallying through the early part of 2021, consumer confidence nationwide has gone into freefall in the midst of the cost of living crisis.



As the national picture for consumer confidence dramatically falls at the time of Covid-19 lockdown, there is also a resurgence of sentiment that household fortunes will decline in the tracking data.

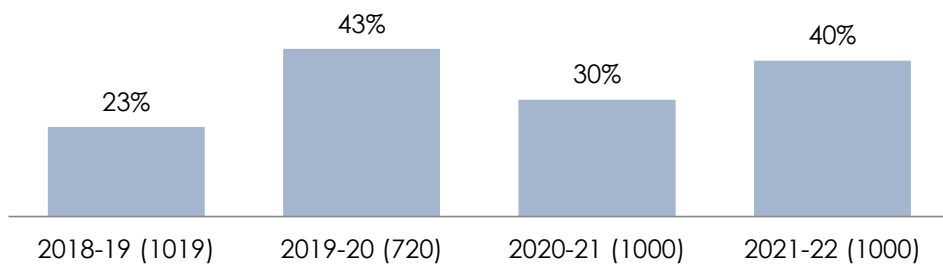
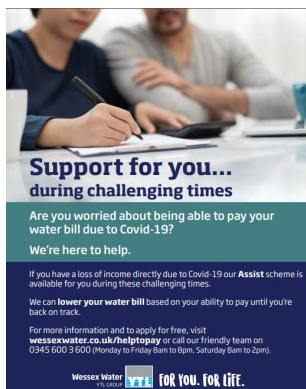
Q11 Do you expect your household to be better off, worse off or about the same in the next 12 months? Base: All



Awareness of Assistance Measures

Awareness of assistance to customers struggling to afford and of priority services both stand at c.4 in 10 this year, broadly in keeping with previous years, although not directly comparable due to change in method. **Those who do not feel charges are affordable are less aware – a need to address this so they may benefit.**

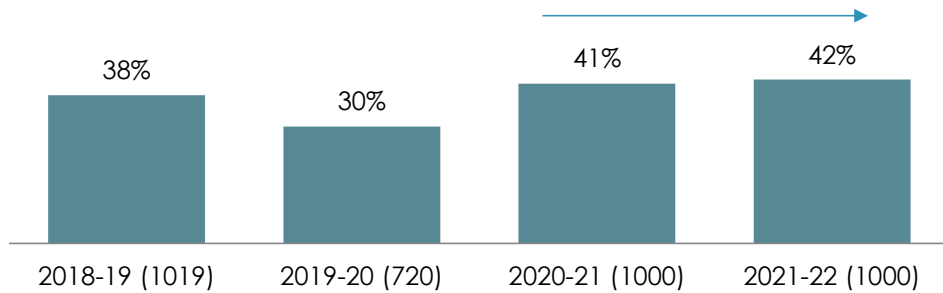
Q20r1: Are you aware of Wessex Water doing any of the following? - **Assisting customers who struggle to afford their water bill** (Base: All respondents)



40%
Aware for 2021-22
(41% of bill payers)

But lower amongst those who disagree charges are affordable (27%) – the group who are the priority to communicate this to.

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)



42%
Aware for 2020-21
(45% of bill payers)

45% of those who exhibit vulnerabilities are aware – still plenty of scope to increase this further



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.

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

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).

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

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



Blue Marble Research Ltd

www.bluemarbleresearch.co.uk

01761 239329

Image Tracker 2020-21

Annual presentation
25th May 2021


Value for Money

Satisfaction &
NPS

Affordability

Image &
messages

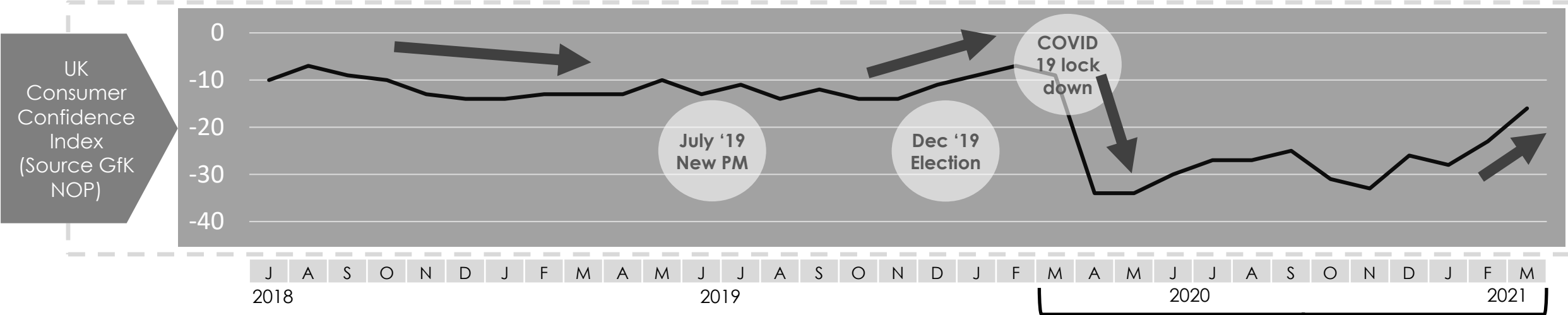
Touchpoints



As we hope to finally emerge from lockdown, it can be hard to remember the gravity and range of challenges brought by 2020-21

An unprecedented collapse in consumer confidence

Consumer confidence nationwide was showing some signs of improvement going into 2020, but this was severely impacted by Covid-19, and has remained very low over the last year, albeit with some signs of recovery in 2021.



23 March PM announces first UK lock down in the UK

10 May PM announces a conditional plan for lifting lockdown

4 July UK's first local lockdown comes into force in Leicester

14 Sept 'Rule of six' – indoor and outdoor introduced

5 Nov 2nd Lockdown begins (ends 2 Dec)

4 Jan 3rd Lockdown begins. Vaccine rollout begins

21 Mar More than 50% of adult population have had first vaccine dose

3 Dec Avonmouth explosion

Wessex Water Initiatives:

- Continued promotion of PSR
- Launch new region wide Covid-19 emergency funds
- NHS uniform washing rebate and other community initiatives
- Additional bill support (Covid-19)

A complicated and fast-changing consumer outlook

Blue Marble's wider longitudinal work has seen fluctuating trends over the course of a very unusual year.

April 2020

Initial post lockdown data suggested utilities (and especially water companies) lagging behind other sectors in their response to Covid-19. A lack of perceived proactivity / visibility?

Autumn 2020

- Earlier patience with reduced service levels evaporating
- Time in lockdown has focused some people more on reviewing service providers / renewals
 - Cost consciousness heightened ...
- ...yet this didn't always lead to action taken in switching: boredom / hunkering down.

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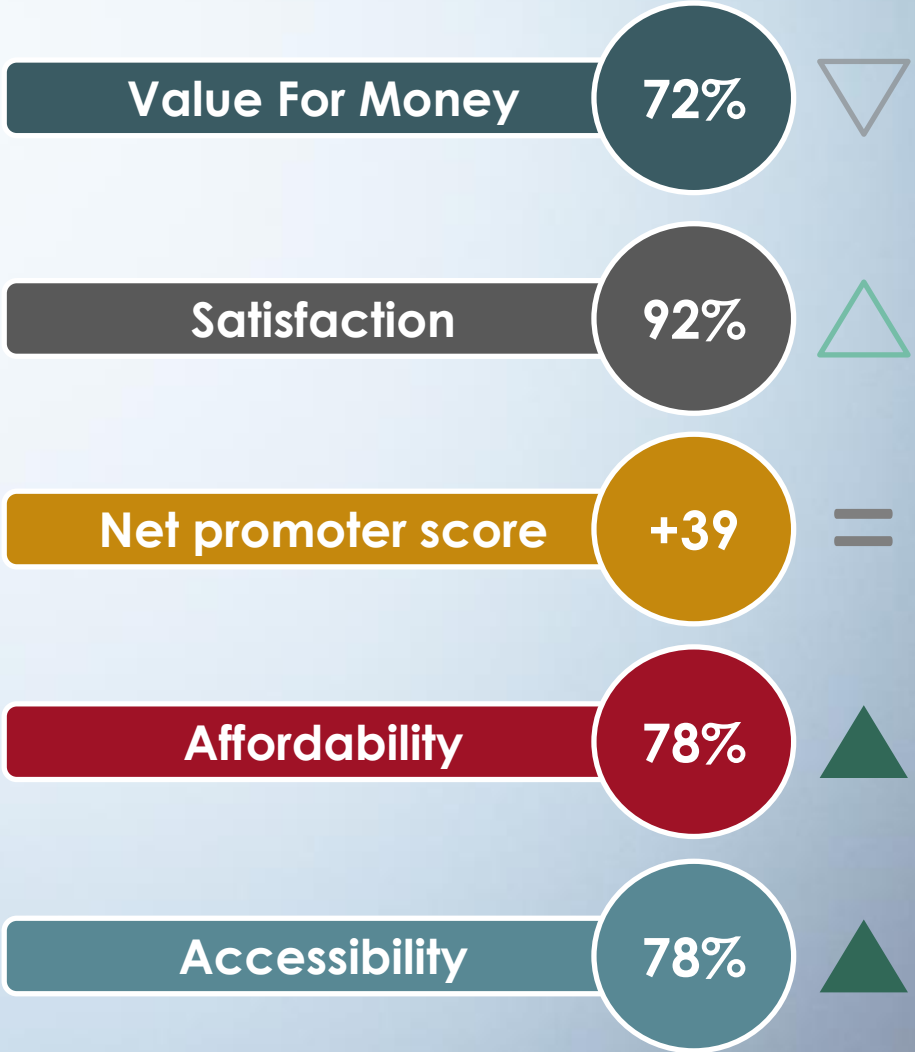
July 2020

- Approaching the end of lockdown 1, there was more positivity about utilities and essential services
- Awareness that companies are generally trying their best in exceptional circumstances
- High awareness and some take up of the range of areas where help offered mortgage holidays, car lease breaks, Council tax breaks etc.

Winter 2020-21

- Greater awareness of energy use (and bills going up)
- Many taking action to reduce energy use – even those who do not have affordability issues
- Meanwhile many also have built up savings with more money in the bank.

In spite of the wider context, key 'health' measures for Wessex Water remain resilient in 2020-21

Key

- ▲ Significant increase
- ▼ Significant decrease
- ▲ Directional increase
- ▼ Directional decrease



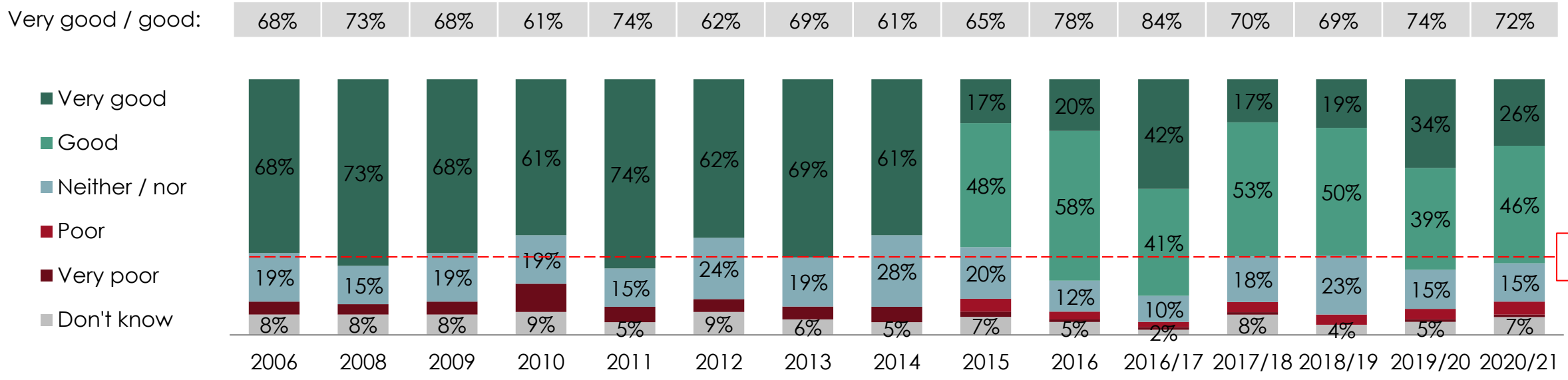
Value for Money

Overall value for money (VFM)

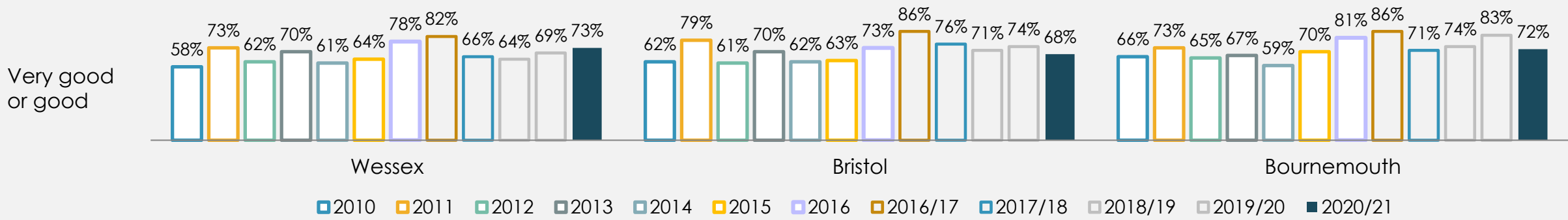
It is encouraging that in spite of the challenges posed by Covid-19, VFM is very similar to the previous year. The Wessex supply area shows signs of some improvement and is no longer behind Bristol and Bournemouth.

Q22. How would you rate drinking water supplies and the sewerage service you receive in your area in terms of value for money?

Base: All



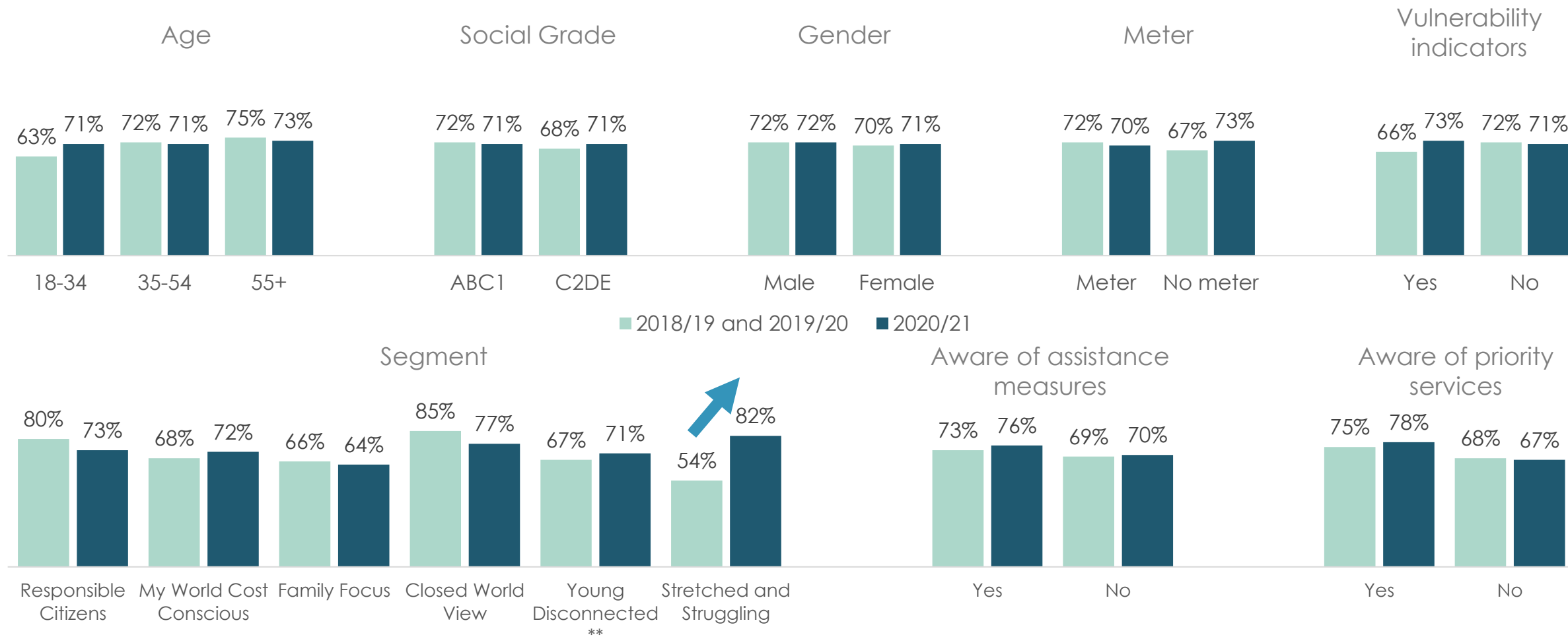
Top 2 mean



Overall VFM by key groups

Post Covid-19 there has been some equalisation of VFM ratings across different groups – improving notably for ‘Stretched and Struggling’ segment, and also signs of improvement for vulnerable and younger consumers. Various support initiatives (both by Wessex and more broadly) in response to Covid-19 may have played a part.

Q22. How would you rate drinking water supplies and the sewerage service you receive in your area in terms of value for money? % ‘Very good value’ or ‘Good value for money’. Base: All 2018-19 and 2019-20 / 2020-21



* CAUTION Low sample size (<80); **CAUTION Very low sample size (<50). Data is indicative only

McDonald's

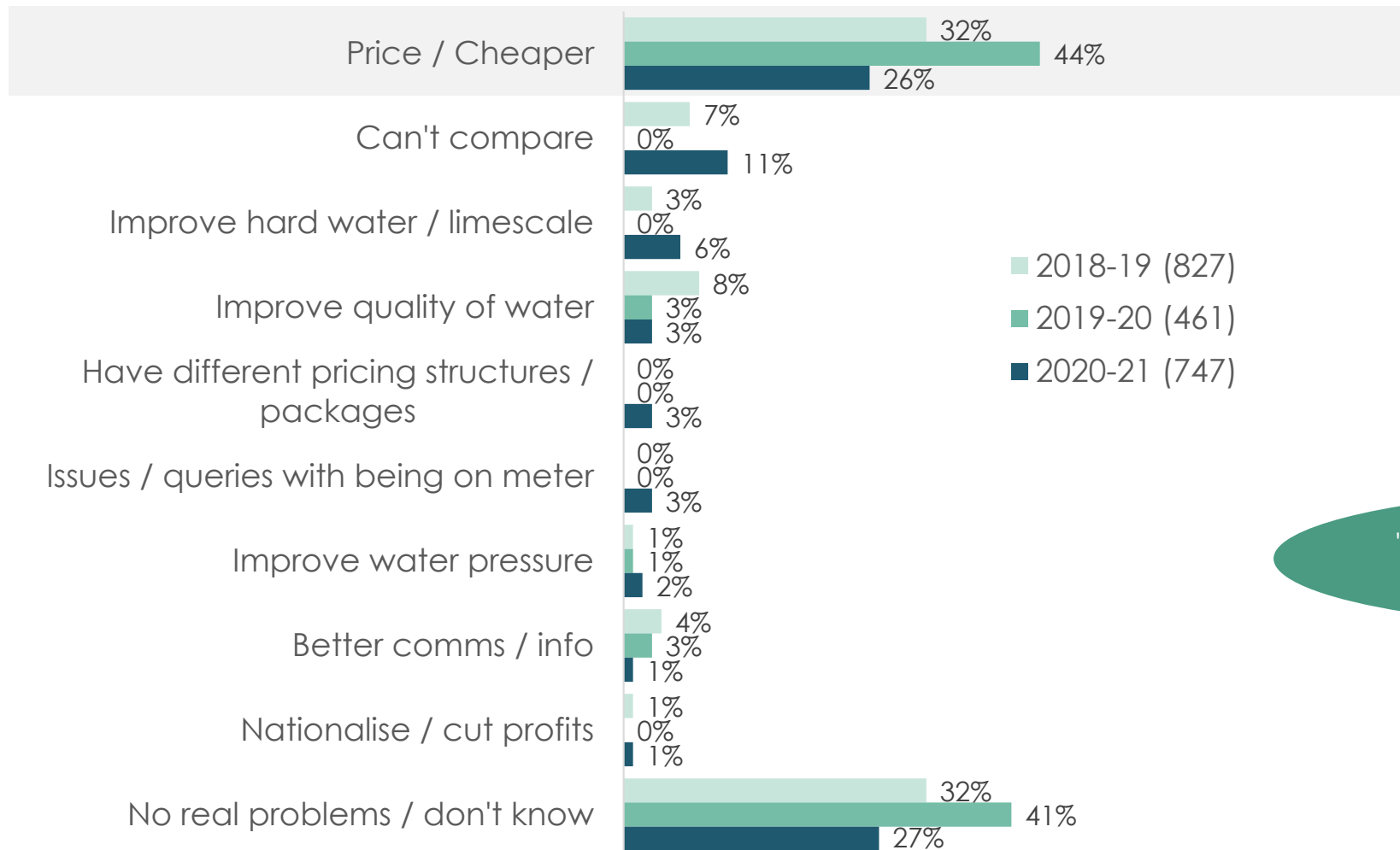
Signs that 'stretched and struggling' are feeling better about VFM than last year – will this be sustained?



Improving VFM...

Simply making bills cheaper is still the most common response on how to improve VFM. Other secondary themes include improving water quality, and the idea of new pricing structures. Covid-19 may be a factor in terms of changing water use patterns at home, and the expectation of new ways to be able to pay (or reduce) bills.

Q23. Can you say in your own words what would improve your view on value for money?
 Base: All who do not say 'Very good value for money'



"Just if it was cheaper, that's it"

"The hardness figure should be on the bill"

"They were a bit expensive but when I needed to contact them because I was having difficulties paying the bill they were helpful"

"The water tastes like chemicals and it's really chalky"

They could make it cheaper but it's not too bad for the service they provide"

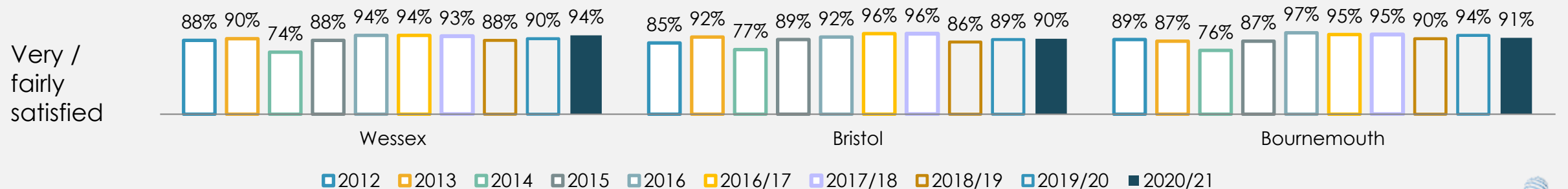
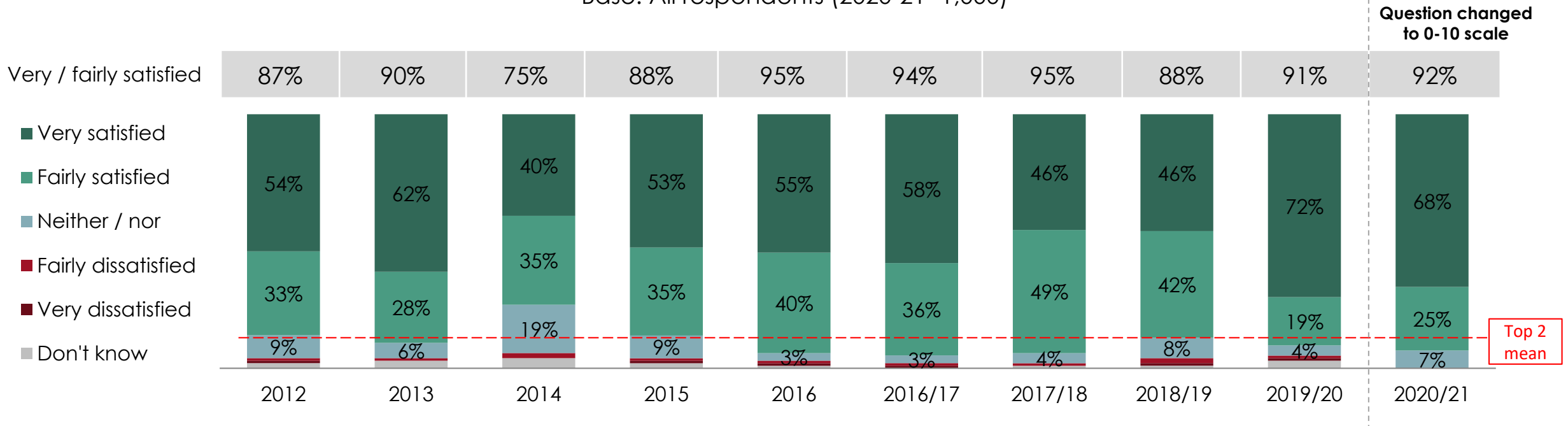


Satisfaction and Net Promoter

Despite the challenges through 2020 and into '21, overall satisfaction has remained strong - over 90% in all three supply areas. There's not much headroom for improvement, with a high proportion saying 'very satisfied'.

Q15 How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?

Base: All respondents (2020-21=1,000)

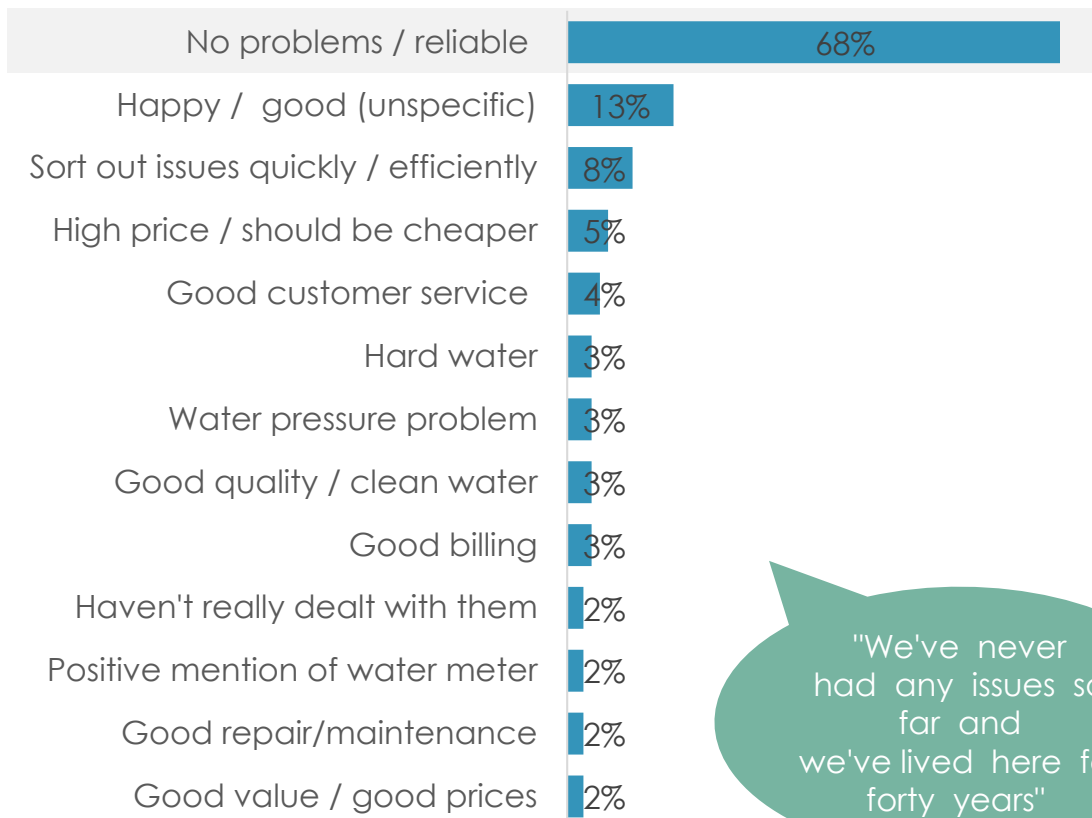


Why satisfied / not satisfied

Satisfaction is largely driven by simply being reliable and problem-free. For the minority of consumers who are less satisfied there's a mix of reasons including water hardness & quality, perceptions of water leaks / waste and the price – but it's important to stress that these are issues for only a small proportion of customers.

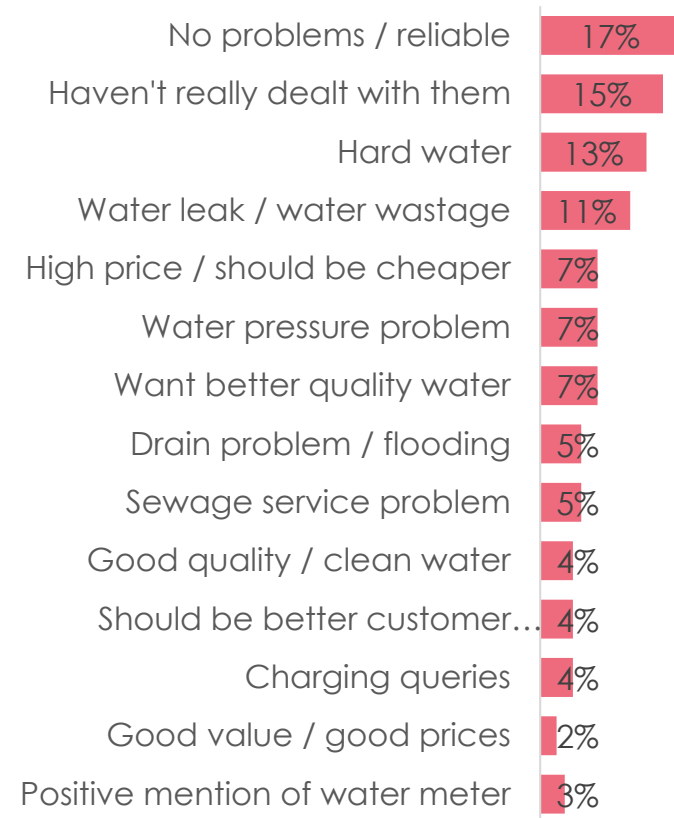
Q16 Why did you say this? Please explain as fully as you can why you gave your satisfaction score. Base: All respondents 2020-21

Those who are satisfied (score 7-10) (Base: 924)



"We've never had any issues so far and we've lived here for forty years"

Those who are less than satisfied (score 0-6) (Base: 76)



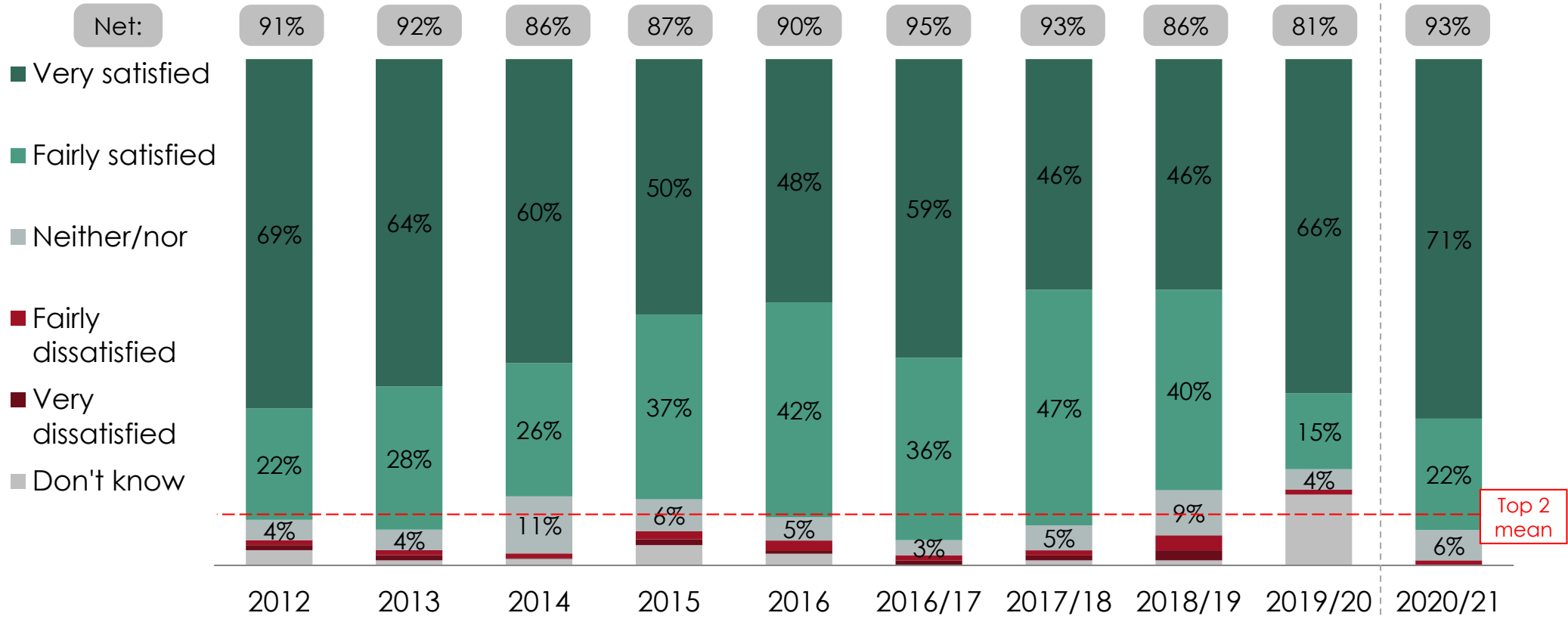
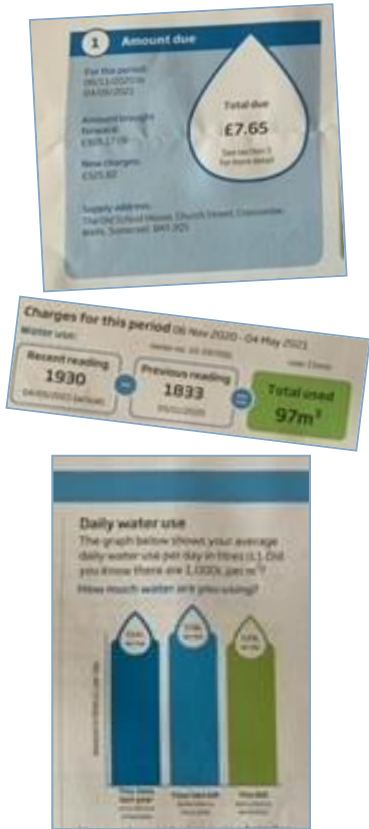
"Our water pressure is not that powerful"

Satisfaction with billing

A key driver of VFM – satisfaction with billing – has rebounded this year. There may be various influences, including familiarisation with the refreshed bill layout and format, the sense of greater flexibility around bill payment during Covid, and a more general sense that utilities and other organisations are more accommodating of people's needs.

Q14 Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months?

Base: All responsible for paying the bill (2020/21=815)



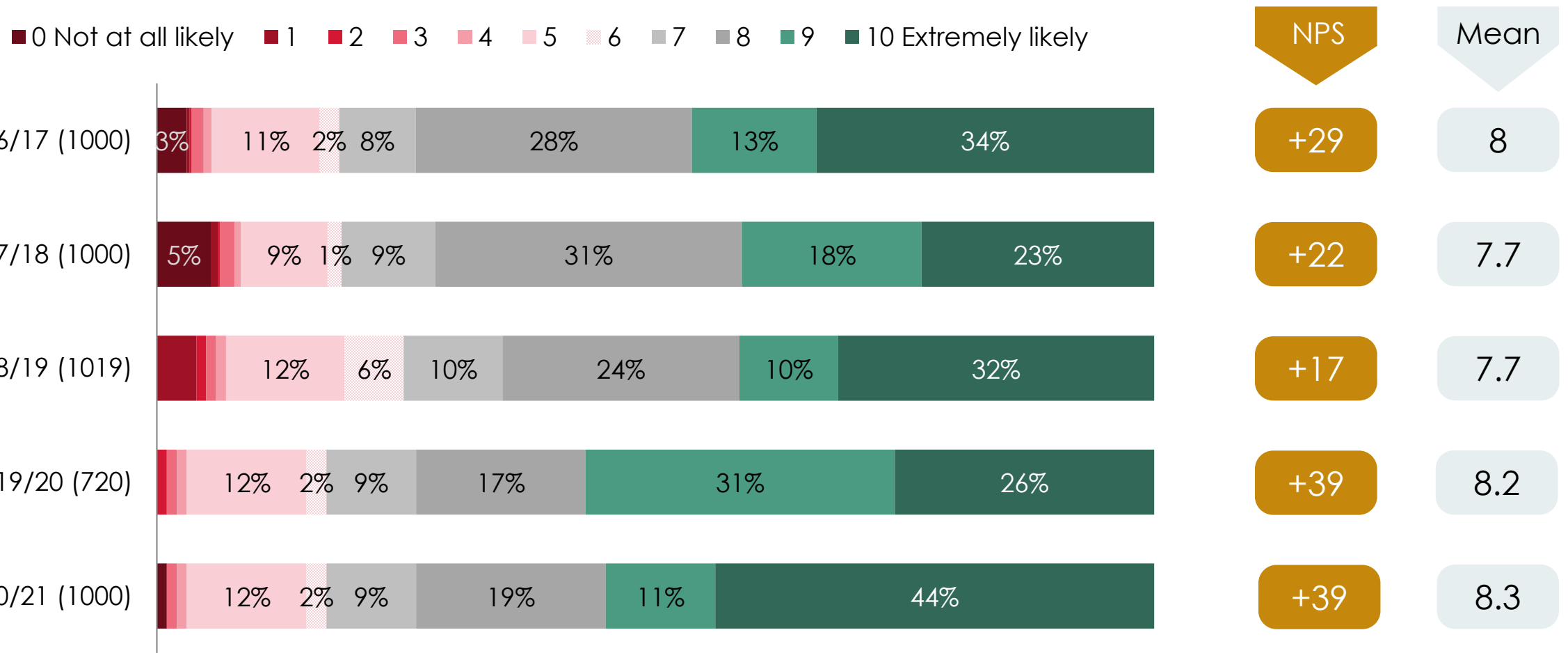
NB: Question changed to a 0-10 scale in 2020-21

NB: question wording altered in 2016: 2010-2015: Overall how satisfied are you with the way Wessex Water handles your billing?
 2016: Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months

Net Promoter Score (NPS)

Across 2020-21, the NPS is has maintained the high score achieved last year, reinforcing that positive sentiment to Wessex Water has been resilient in the face of the challenges posed by Covid-19.

Q33. If you were able to choose your water and sewerage provider, how likely would you be to recommend Wessex Water to a friend or colleague? Base: all respondents



Reasons for recommendation score

Even 'promoters' often give a good score simply because they have had no problems – along with a significant minority who mention positive service experience (promptness/ efficiency; friendly/helpful and reliable & efficient). Amongst detractors, most simply don't have grounds for 'recommending'; few raise any active issues.

Q34 Why do you say that? Top answers for each group Base: All respondents 2020-21



**Promoters
(538)**

Had no problems 55%

Happy with service / satisfied – 21%

Can't compare/ only option – 12%

Sorts out issues promptly/ efficiently – 11%

Friendly/helpful – 8%

Reliable / efficient – 5%

Good (quality) / clean water – 3%

Well known / good reputation – 3%

**Passives
(278)**

Had no problems 33%

Happy with service / satisfied – 21%

Can't compare / only option – 21%

Price issue / expensive – 9%

Good (quality) / clean water – 4%

Sorts out issues promptly/efficiently – 4%

Don't know (enough) – 3%

**Detractors
(184)**



Can't compare / only option 39%

Don't know (enough) – 14%

No information on other companies – 7%

Don't give recommendations – 7%

Price issue / expensive – 6%

Had no problems – 6%

Slow to respond – 3%



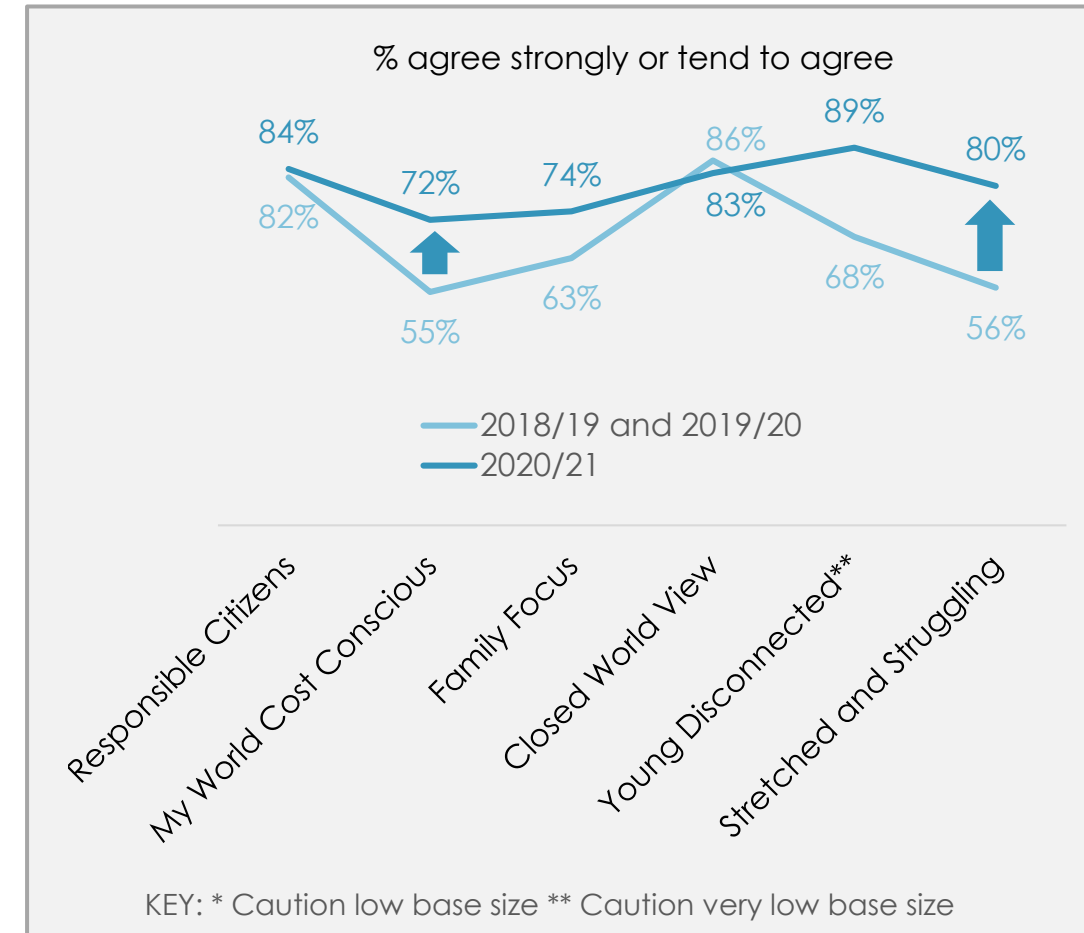
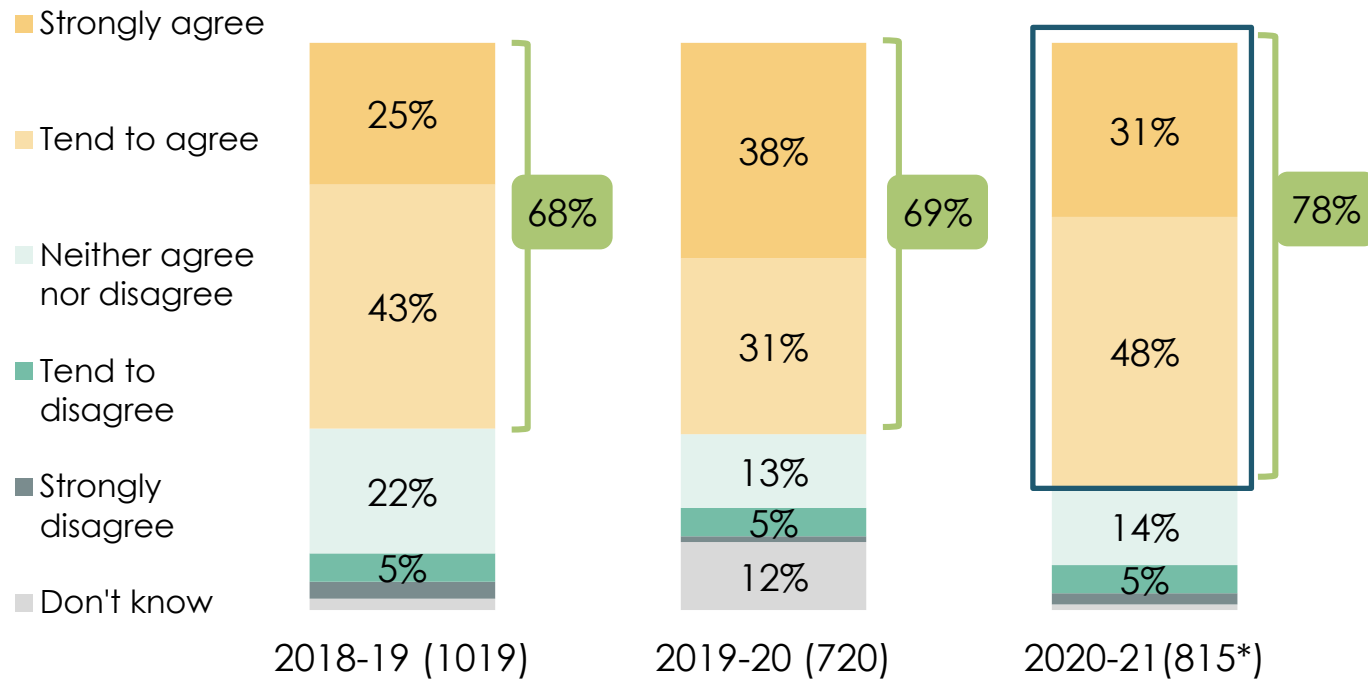
During the disruption brought about by the pandemic, ensuring reliability & dependability, and efficiently handling issues, may have been more important than ever



Affordability

Despite the onset of Covid-19, bill affordability has risen in 2020-21. This may reflect efforts to assist consumers - both from Wessex Water and wider support from government and other service providers. While it's encouraging that segments who worry more about their bill (especially 'Stretched and Struggling') now feel the bill is more affordable, will this remain the case when Covid-19 support is phased out?

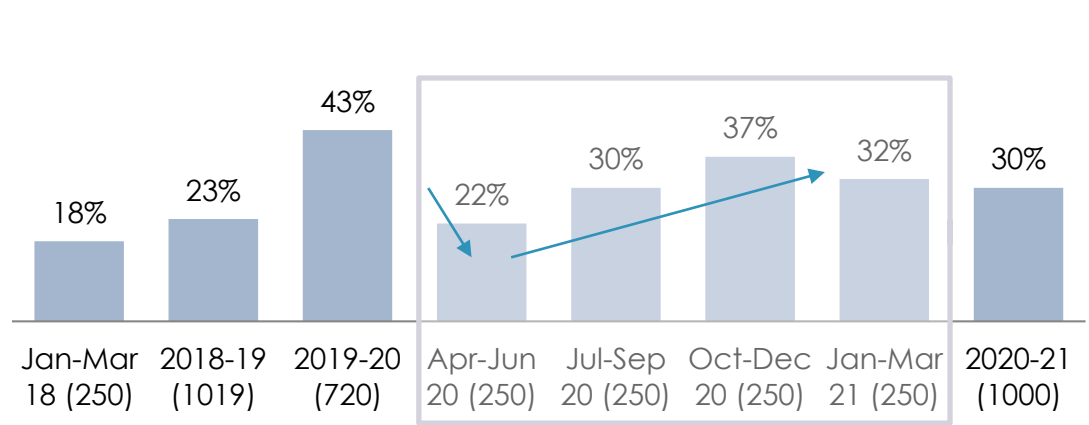
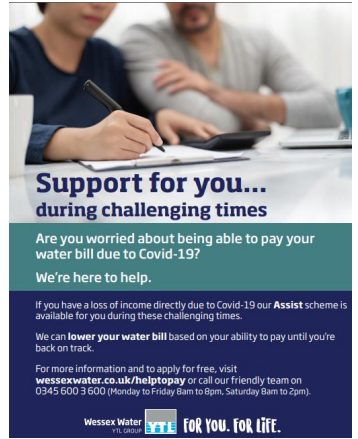
Q19b. How much do you agree or disagree that the total water and sewerage charges that you pay are AFFORDABLE to you? Base: All bill payers



Awareness of Assistance Measures

Immediately post-Covid there was a dip in awareness of Wessex Water’s financial assistance measures – these may have been overshadowed by other new high profile Covid-related support (e.g. furlough). Meanwhile awareness of other (priority) services from Wessex have held up well.

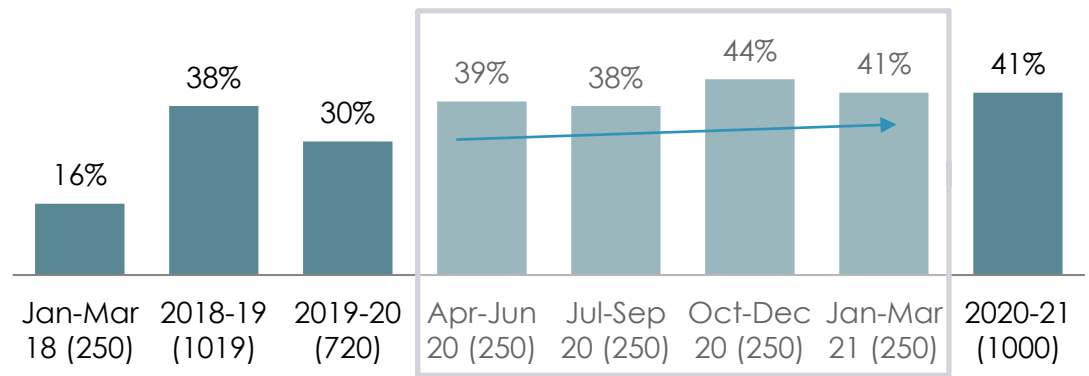
QF10 Are you aware of any kind of assistance that Wessex Water offers for customers **who struggle to afford their water bill**? (Base: All respondents)



30%
Aware for 2020-21
(33% of bill payers)

- Higher amongst:**
- Responsible Citizens (38%)

QF12 Are you aware of any additional services offered by Wessex Water? These are also known as **Priority Services**? (Base: All respondents)



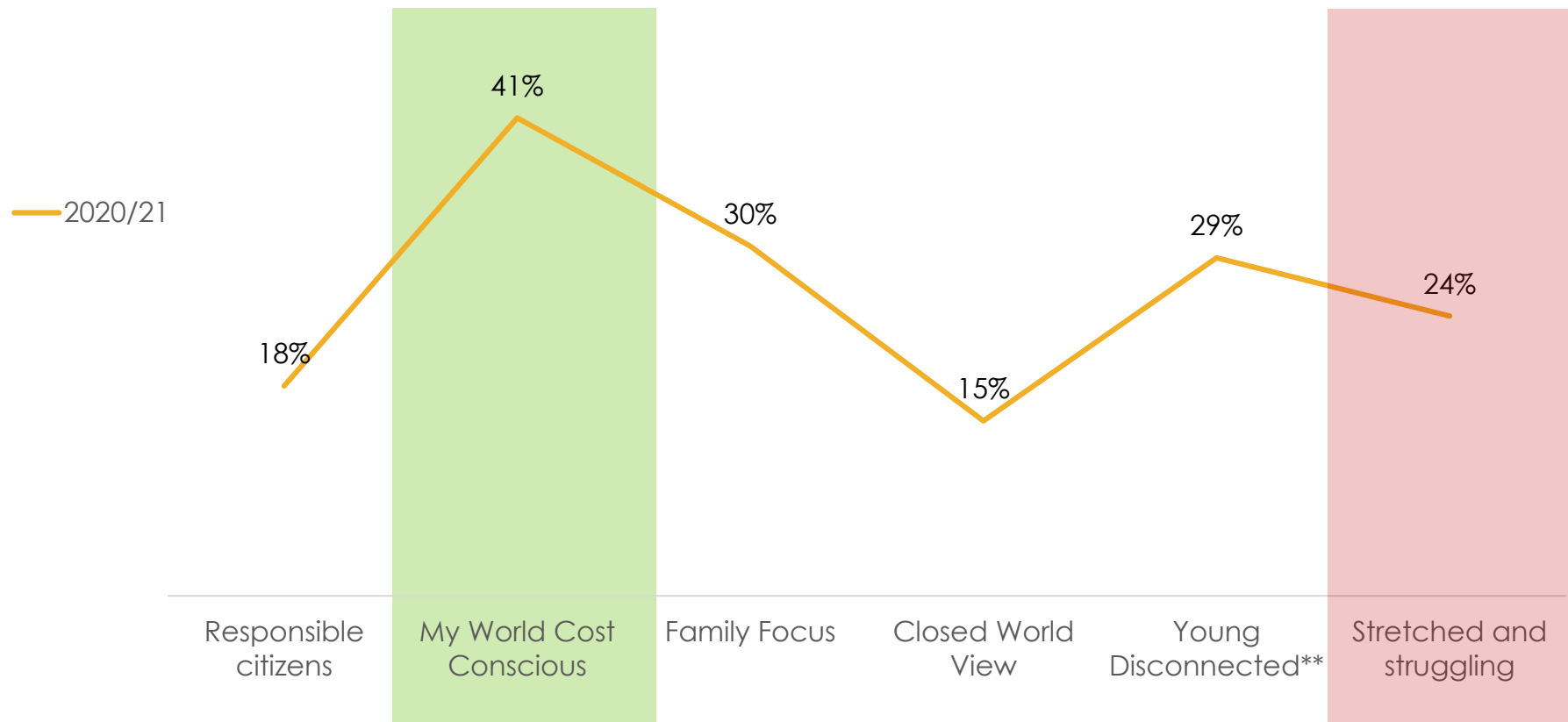
41%
Aware for 2020-21
(43% of bill payers)

- Higher amongst:**
- Those who recall Wessex Water social media (60%) and magazine (50%)
 - Family Focus (49%)
 - My World Cost Conscious (47%)



Perception that Wessex Water helps those less able to afford their bill

Perceptions of Wessex Water helping those less able to afford their bill differs between segments; 'My World Cost Conscious' are more likely to agree. Meanwhile, even though 'Stretched and Struggling' are feeling more able to afford their bill this year, this is not necessarily because they feel Wessex Water is helping them do so – other factors at play? (e.g. furlough?).

Q17 How much would you agree or disagree - Helps those who are less able to afford their bill? Base: All respondents in each segment



Note that recall of the Wessex website and social media correlate with greater endorsement of 'helps those less able to afford their bill' – are people finding out about financial support in these ways?



FOR YOU. FOR LIFE.

Your account | Help and advice | Community | Environment | Service

SUPPORT DURING CHALLENGING TIMES

◀ We can lower your bill until you get back on track.

Find out more

SEARCH FAQs



MORTGAGES

Government announces three-month mortgage holiday in Covid-19 package

The Government's announcement means all lenders will now have to honour the three-month time frame.

ROZI JONES | 18TH MARCH 2020

Covid 19 Hardship relief

As part of National and Local Government's response to the Covid 19 pandemic, the council has introduced a scheme to reduce the council tax payable by Bath and North East Somerset residents who receive Council Tax Support and are of working age.

Support for you... during challenging times

Are you worried about being able to pay your water bill due to Covid-19? We're here to help.

If you have a loss of income directly due to Covid-19 our **Assist** scheme is available for you during these challenging times.

We can **lower your water bill** based on your ability to pay until you're back on track.

For more information and to apply for free, visit wessexwater.co.uk/helptopay or call our friendly team on 0345 600 3 600 (Monday to Friday 8am to 8pm, Saturday 8am to 2pm).

Wessex Water YTL GROUP **FOR YOU. FOR LIFE.**

Affordable bills for all

During these testing times, many are worried about what the future holds for their finances. If you're facing financial difficulty, either short-term or long-term, we are here for you.

Need to lower your bill? If you're unable to afford your water bill, we can help. We can reduce your bill until you're back on track. We can also help you to get back on track.

Want to repay water debt and get back on track? We can help you to repay your water bill. We can offer you a repayment plan that suits you. We can also help you to get back on track.

Are you a pensioner on a low income and missing out? More than 21,000 of our low income pensioners are receiving a discount of around £60 a year off their water bill. If you're eligible, we can help you to get back on track.

Sign your loved ones up to Priority Services We can help you to sign up your loved ones to Priority Services. We can help you to get back on track.

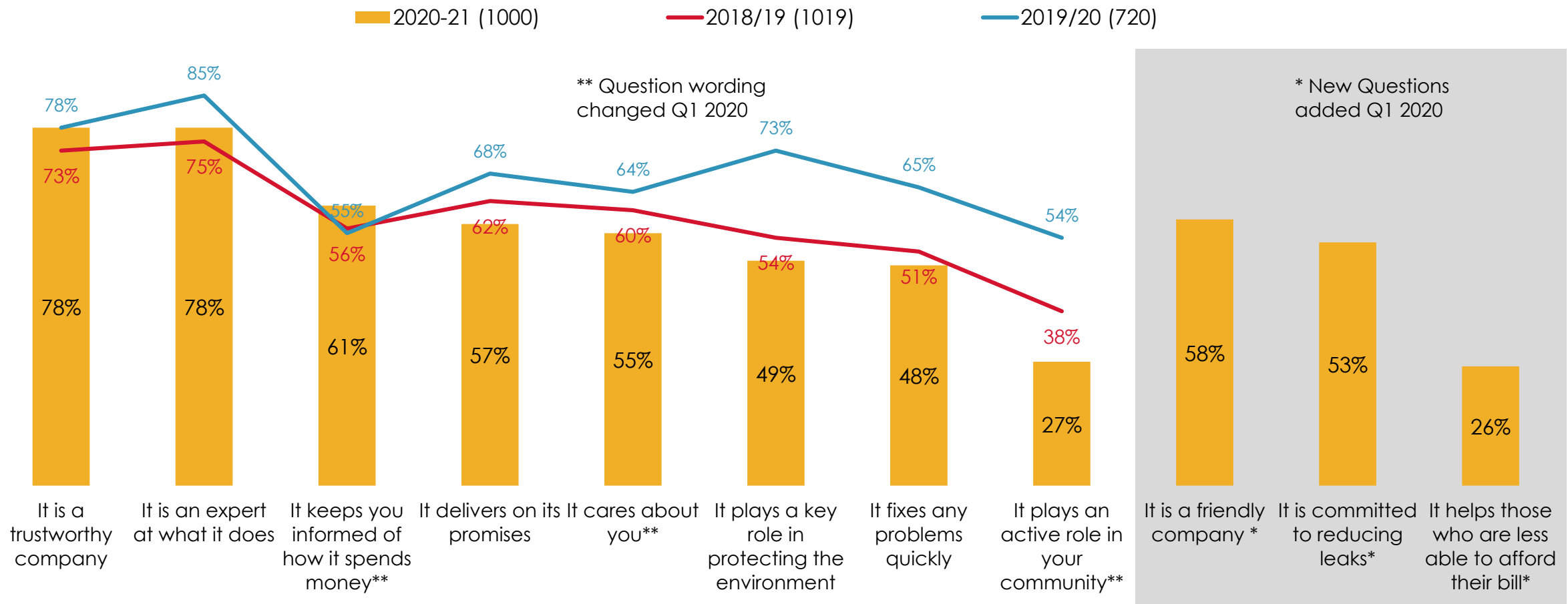


Image and Message recall

Image of Wessex Water

Across 2020-21 'trustworthy' holds up strongly – likely to be particularly important in the current climate - and the key element of 'keeping informed on spend' has improved. Meanwhile appreciation of Wessex Water's local community and environmental roles have diminished this year – less visible during lockdown as a number of initiatives (e.g. education & events) were halted. (Note there are early signs of growing environmental associations in Quarter 4 – to be monitored).

Q17. How much would you agree with the following statements? (% agree strongly or tend to agree). Base: All respondents




Recall of messages / information about Wessex Water

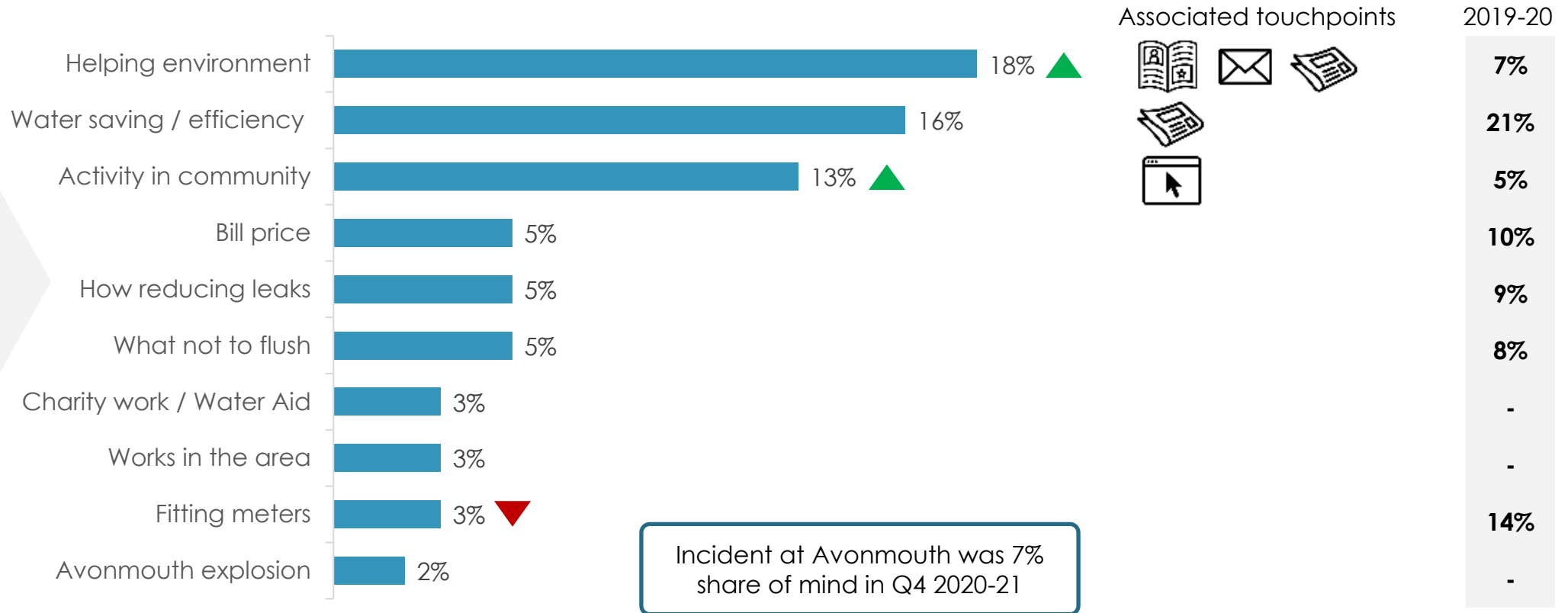
Amongst the minority of customers who could tell us the subject of information seen or heard for Wessex Water, the focus was slightly more on the environment than last year, while water saving / efficiency measures remained a prominent topic. The Avonmouth accident was noted by some in the final Quarter of the year, although not a high share of mind.

Q25. And what did you hear about Wessex Water or what was the subject of that information?

Base: All 2020-21 who mention anything (289).



Share of mind
Top 10
(% share of all mentions)



Key: ▲ Change since last year Wessex magazine Letter Local paper Website

In the last year 'non core' image associations have faded



Panorama feature on sewage leaks was after 2020-21 fieldwork, so will not have influenced results here, but this is a topic to monitor in future.



'Visible' community actions e.g. education and events had to be halted due to Covid.

Amongst the minority of consumers who recall specific messages about Wessex Water, the environment is increasingly a topic they mention. Messages around environmental action may be increasingly important to communicate social purpose, and counter any negative wider publicity.



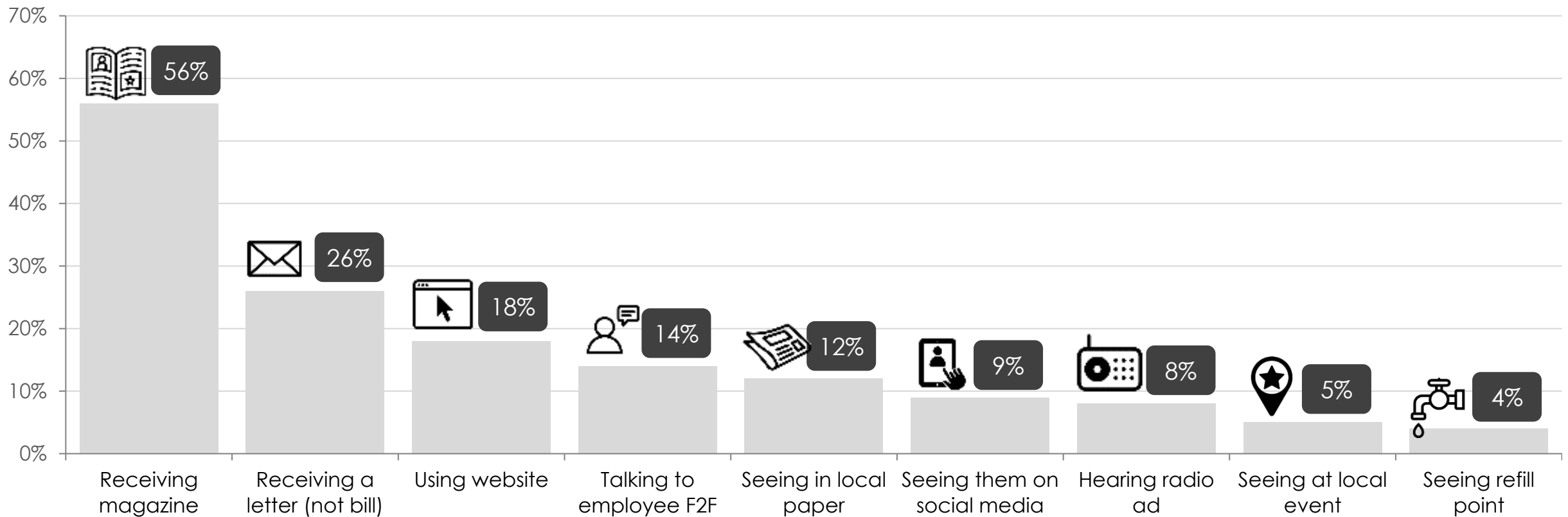
Touchpoints

Prompted recall of touchpoints (2020-21)

By far the most widely recalled touchpoint for Wessex Water (other than receiving the bill) is the Wessex magazine. Encouragingly, nearly 1 in 5 recall visiting the website in the last year – higher numbers than we have seen historically.

Q24ii NEW QUESTION Thinking about Wessex Water, in the last year do you recall...?

Base: All respondents 2020-21 (1,000)

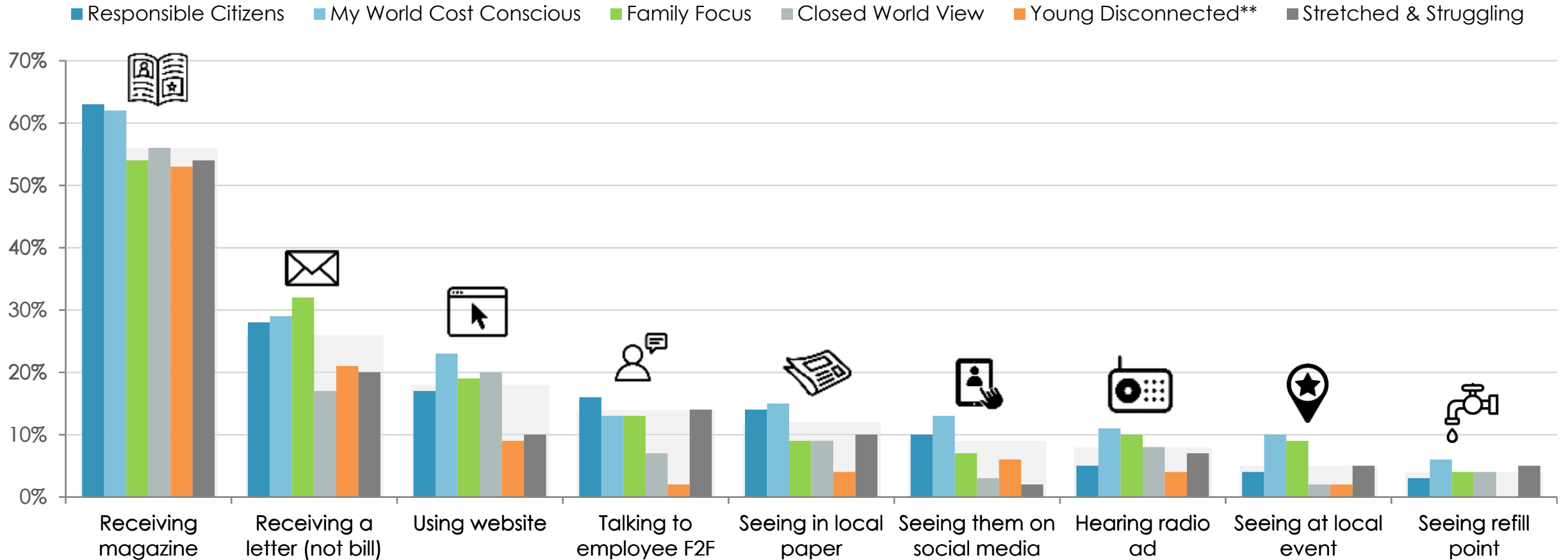


Prompted recall of touchpoints by segment (2020-21)

'Responsible Citizens', 'My World Cost Conscious' and 'Family Focus' recall a slightly wider range of touchpoints than other segments. Talking to employees is more widely recalled amongst 'Stretched and Struggling' than many other touchpoints – personal contact more relevant for them than other channels?

Q24ii NEW QUESTION Thinking about Wessex Water, in the last year do you recall...?

Base: All respondents 2020-21 in each segment



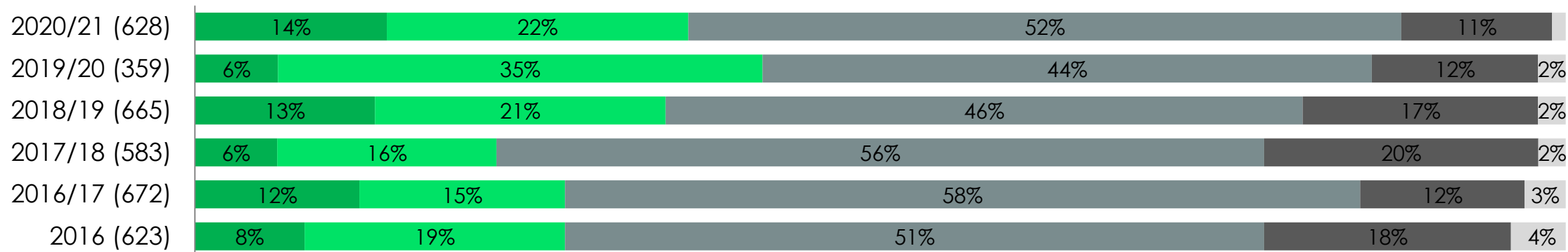
Quality of magazine readership remains consistent with previous years, with nearly 4 in 10 saying they read 'all or most'. The magazine remains an opportunity to get important communications noticed. Content is also rated useful by the majority of those aware.



Q28 How much did you read of Wessex Water magazine?

Base: Those who recalled receiving WW magazine

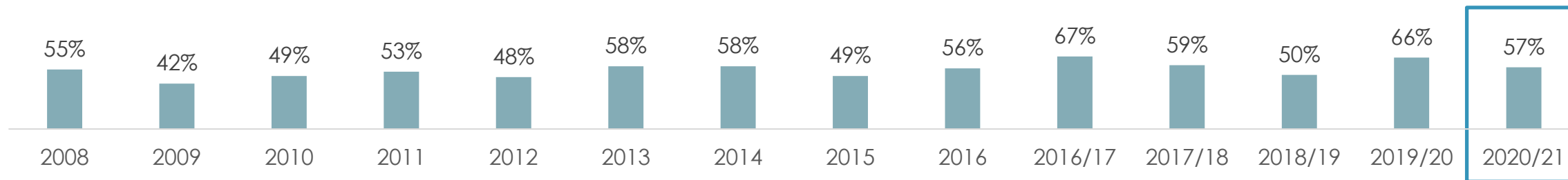
■ All of it ■ Most of it ■ Just flicked through it ■ Did not read any of it ■ Don't know



Q29 Overall how useful did you find Wessex Water magazine?

% very or quite useful

Base: recalled receiving WW magazine, (2020-21: 628)

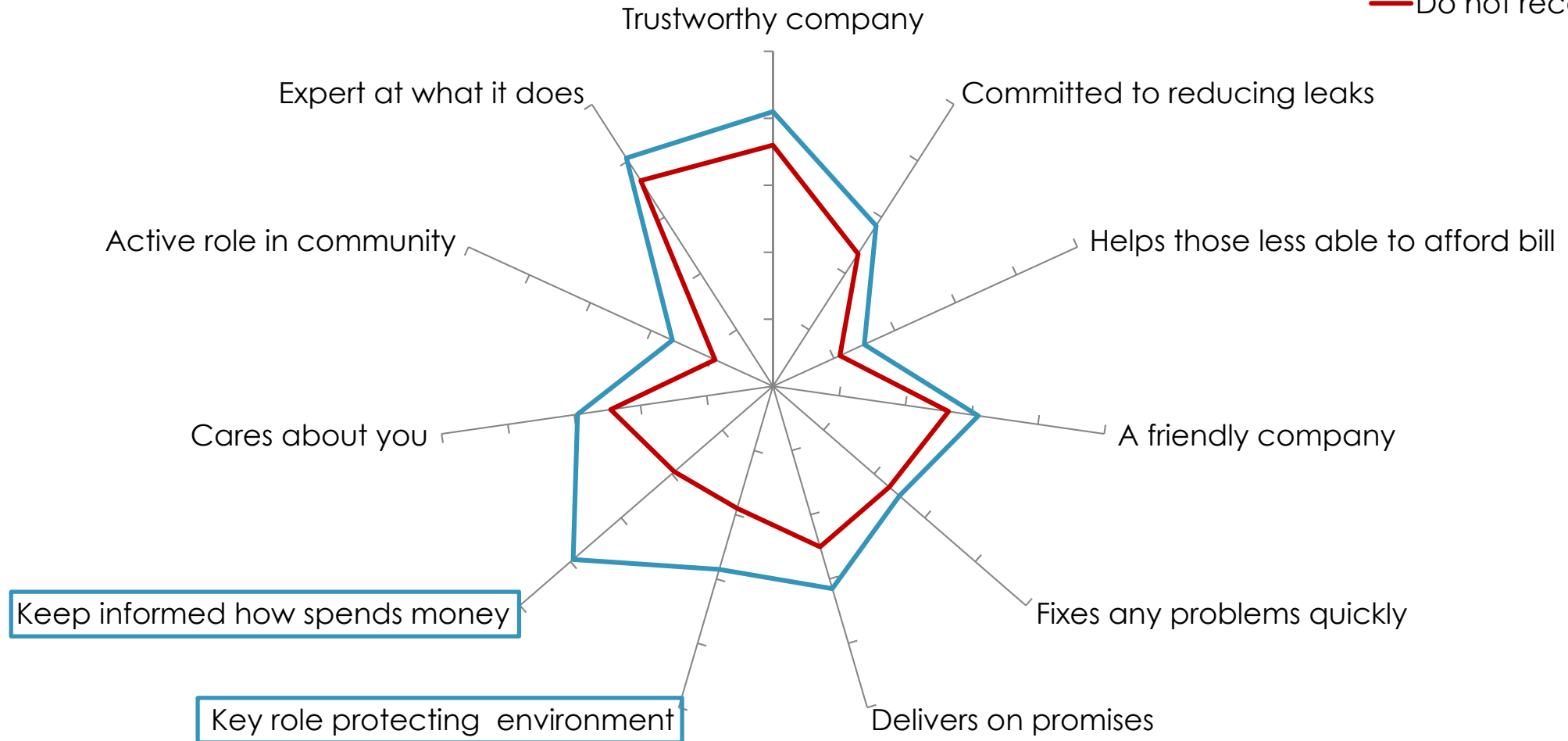


Relationship between magazine recall and imagery (2020-21)

Those who recall the magazine have a richer impression of Wessex Water image – and particularly are more likely to feel Wessex keeps them informed on spending, and also that the company plays a key role in protecting the environment; long-form editorial content may lend itself to effectively conveying these aspects of the brand.



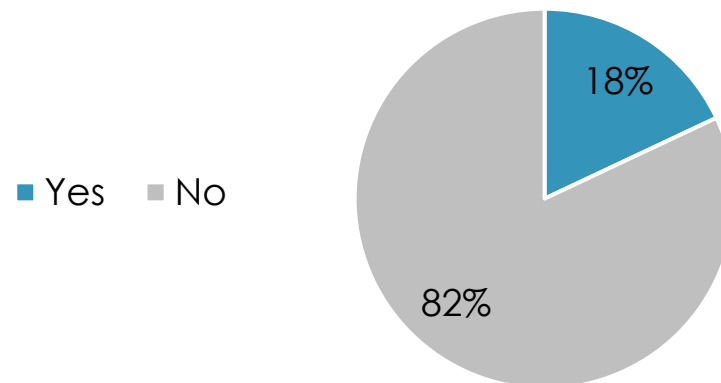
— Recall mag (628)
— Do not recall (372)





Q24 Thinking about Wessex Water, in the last year do you recall using their website?

Base: All respondents (1,000)



Q31 Overall how easy was the website to use?*

Base: All who have used website (147)

■ Very easy ■ Quite easy ■ Neither difficult nor easy ■ Quite difficult ■ Don't know

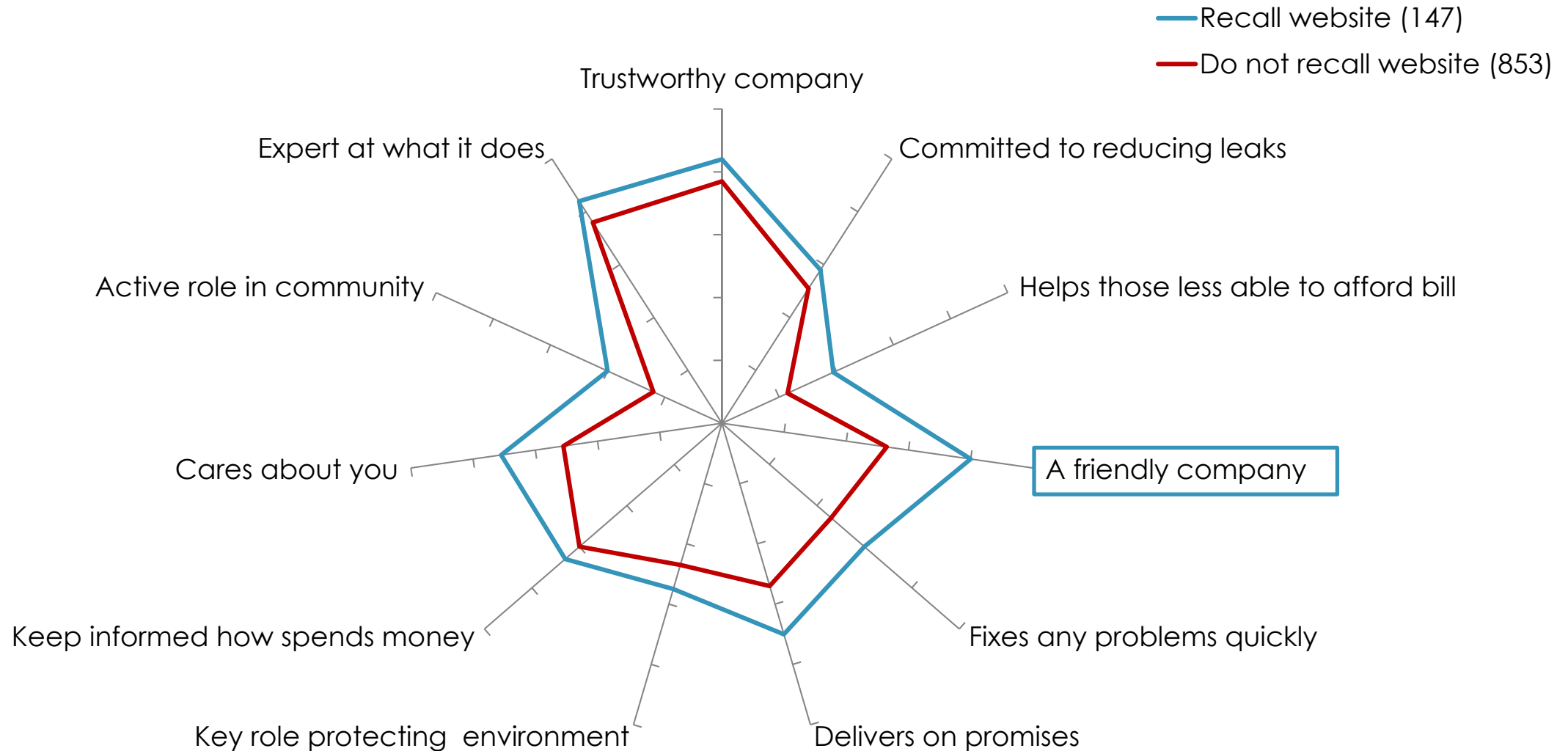
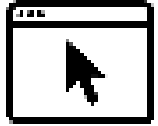


Nearly 1 in 5 customers recall using the website recently – higher claimed levels than we have seen historically. Of those using it, over 50% said it was very easy to use – an encouraging performance as the website becomes a crucial window into Wessex Water activities and services.

*NB: new question for 2020-21

Relationship between recall of using website and imagery (2020-21)

Those who recall using the Wessex website have a richer image of the company than those who don't. Use of the website may convey the more 'human' element of being a friendly company, and there's also evidence it is more associated with responsiveness (e.g. fixes problems quickly).





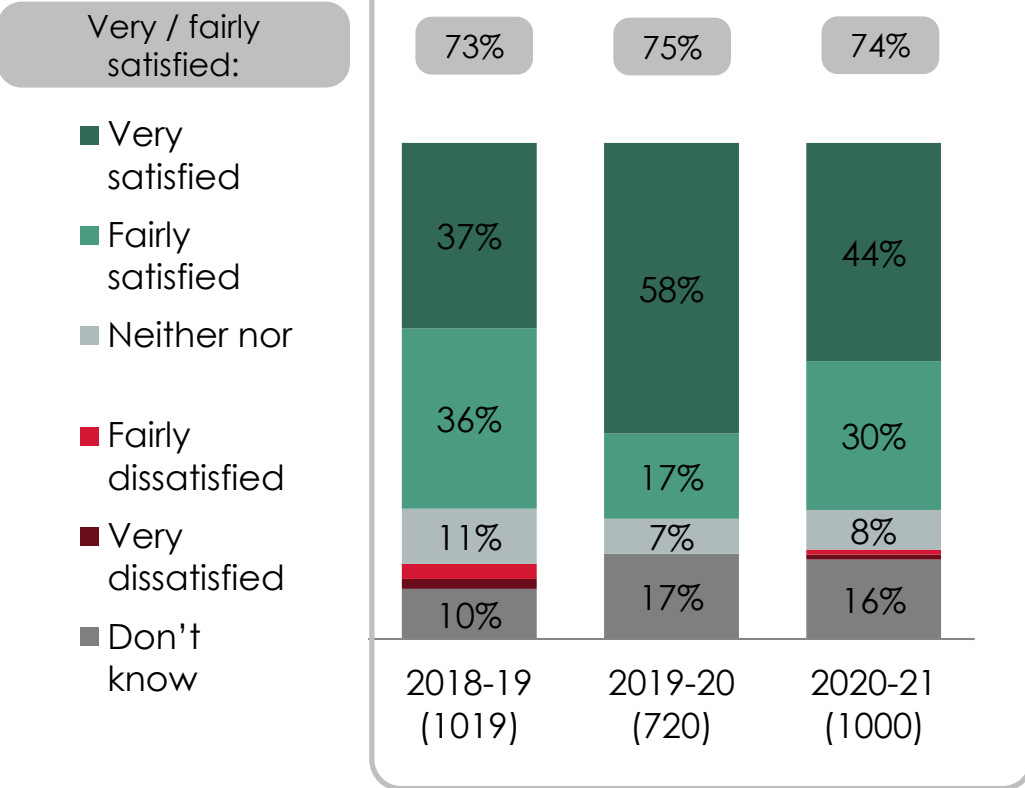
...but
evidence that
digital and
social are
building

...and we note that for the Stretched and Struggling segment, speaking to someone may be more effective / appropriate than digital media as a means of engaging

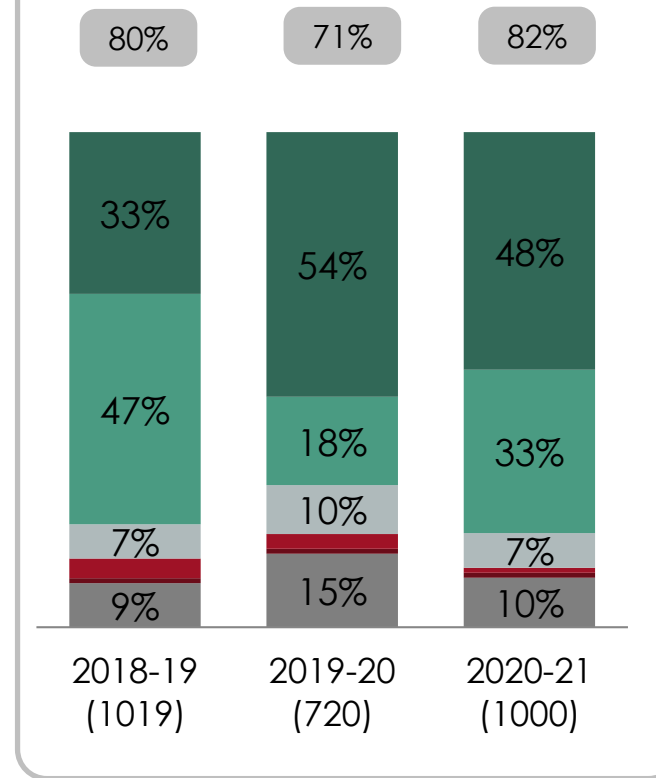
Ease of access

Most remain broadly happy with accessibility, although around 1 In 7 say they 'don't know' about the methods of contacting Wessex. There's a noticeable improvement this year in 'clear and easy to understand' which correlates with more people claiming to have used the website – is the refreshed site improving impressions of accessibility?

Q17C_4. How would you rate Wessex Water's performance in - The range of methods through which you can contact them?



Q17C_5. How would you rate Wessex Water's performance on - They make information about their services clear and easy to understand?



Ease of access combined metric:

78%

(The sum of agreement with both statements divided by 2)

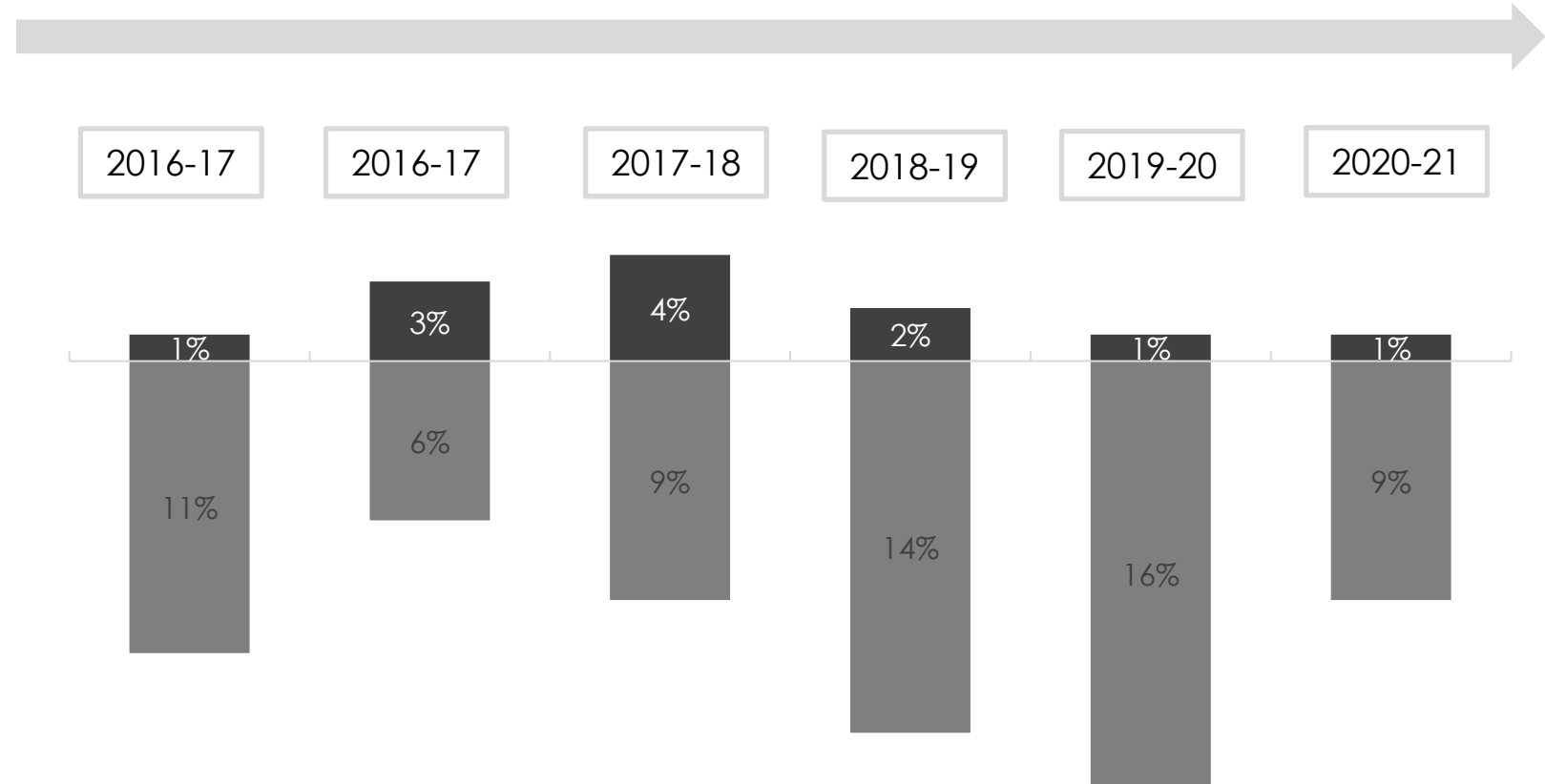
Significantly up from last year (73%)

Base: All respondents

Meeting information needs?

The balance of opinion remains that Wessex provides 'too little' info, although signs that there is less of a dearth of contact this year – could this be down to more (relevant) communications around support in light of Covid-19? Nevertheless, customers would accept more communication, with almost no-one feeling they get 'too much'.

Q26 Overall do you think Wessex Water provide their customers with too little, too much or about the right amount of information? Base: All respondents (2020-21=1,000)



■ Too much

■ Too little

In particular those who think 'too little': Engaged Stretched & Potentially Receptive segments; those 'less than satisfied'



Summary

1. As we hope to finally emerge from lockdown, it can be hard to remember the gravity and range of challenges brought by 2020-21

2. Shifting public attitudes to services and utilities: Initial understanding and sympathy, followed by higher expectations. Broadly they are felt to have risen to the occasion

3. Within this dynamic wider context, impressions of Wessex Water remain resilient. To a degree Wessex may be being 'carried with the tide' rather than standing out

4. In a changed landscape, 'Stretched and Struggling' are feeling better about VFM and affordability – but will this be sustained?

5. During the pandemic, simply ensuring reliability & dependability, and efficiently handling issues, has been critical; Non-core functions have faded from view

6. However, looking ahead we anticipate Wessex Water needs to push beyond strong 'business as usual' imagery and communicate facets of a wider agenda

7. The magazine remains Wessex Water's most effective channel, but evidence that digital and social channels are building impact

8. In a world still in flux we will need to monitor evolving underlying needs and priorities to adapt to what consumers need in service and communication



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Appendix – Method

Telephone interviews

The 2020-21 survey is the fifth year with continuous interviewing through the year

Random sample of domestic consumers

Includes both those responsible for paying water bill and in 2020-21 also includes non-bill payers (20% of sample). Quotas for bill payers consistent with previous years on region and age

Data weighted at analysis

Data is weighted to gender, age and area to ensure consistency within each Quarter

Fieldwork April 2020 to March 2021

Q1 interviewing Apr – June '20 (n=250)
Q2 interviewing July – Sept '20 (n=250)
Q3 interviewing Oct – Dec '20 (n=250)
Q4 interviewing Jan – Mar '21 (n=250)

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

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

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

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

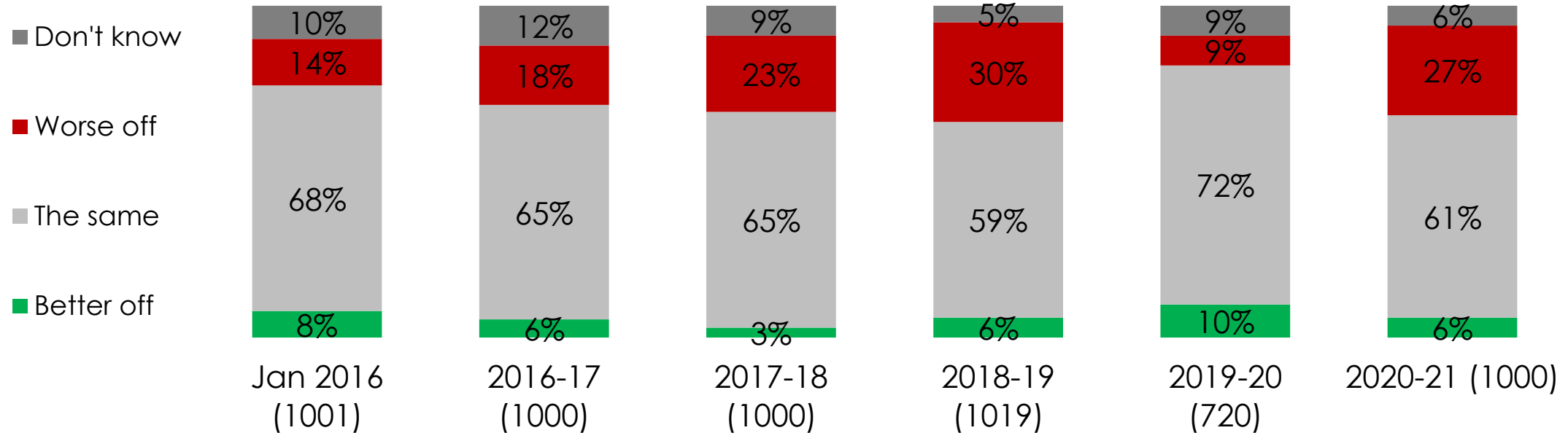
- Note that we highlight very small sample sizes (under 50) using '***'. These percentages are indicative only, with caution needed for interpretation
- In some cases actual counts rather than %s are quoted, where sample sizes are too small to be viable to be expressed as %s
- Note that 'net' is used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



Appendix – Wider Context

As the national picture for consumer confidence dramatically falls at the time of Covid-19 lockdown, there is also a resurgence of sentiment that household fortunes will decline in the tracking data.

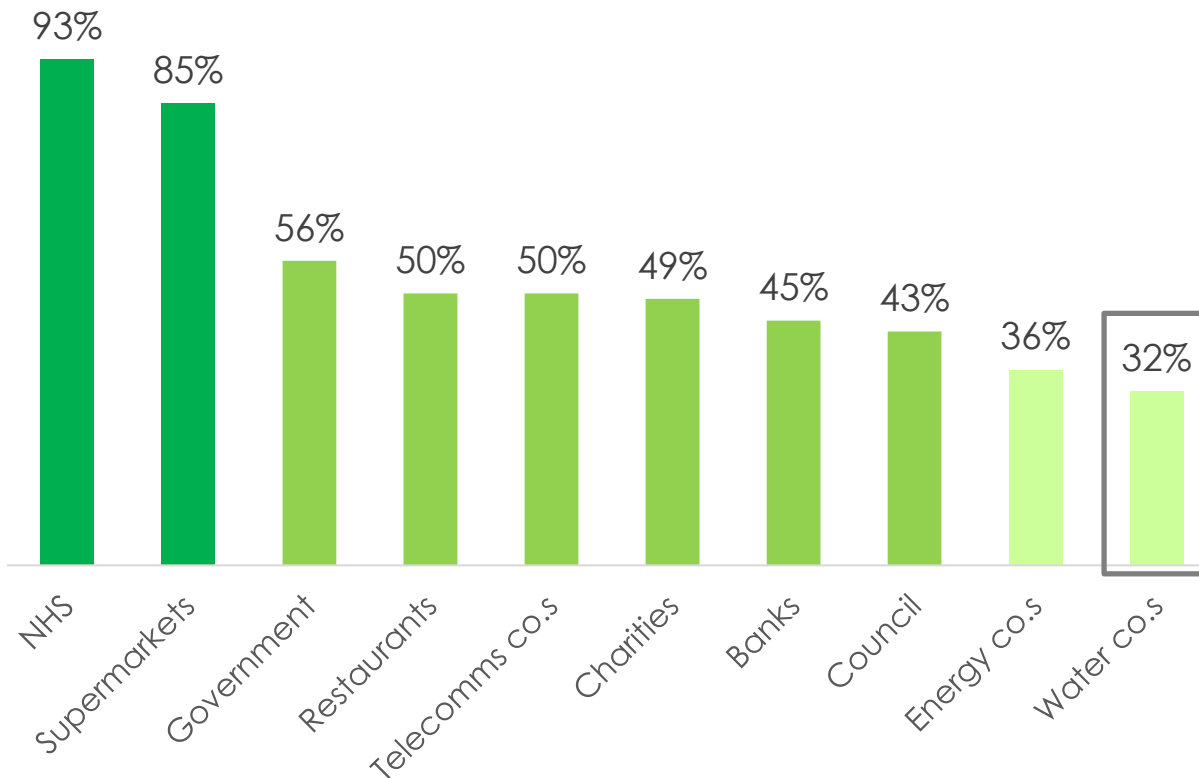
Q11 Do you expect your household to be better off, worse off or about the same in the next 12 months? Base: All



The changing consumer perspective – May 2020

- Our nationwide data from early May 2020 shows how water companies, in the early stages after the Covid-19 lockdown, were more 'recessive' than organisations in other sectors, and also how widespread anxiety and money concerns have become.

How well have...responded to the coronavirus outbreak in the UK?
% 'very well' or 'fairly well'



Thinking about the last month, have you done/felt each of these more, less or about the same as before the coronavirus outbreak?

	More than	About the same	Less than
Feeling uncertain about my future	53%	41%	5%
Feeling stressed	48%	41%	11%
Worrying about money	39%	52%	9%
Exercising regularly	28%	40%	32%
Feeling connected to my local community	27%	54%	19%
Eating healthily	23%	54%	23%

Base: All GB adults aged 18+ (n=2,025). Fieldwork conducted online between 1st May and 3rd May 2020.

Post-Covid impact on segment sizes

% of Wessex Water customers in each segment

Segment	Pre Covid (2018-19 & 2019-20)	Post Covid (2020-21)
Responsible Citizens	34%	27%
My World Cost Conscious	22%	26%
Family Focus	20%	18%
Closed World View	8%	11%
Young Disconnected**	3%	4%
Stretched and Struggling	11%	14%



Responsible Citizens

34%

27%



Responsible Citizen segment shrank the most. Less confidence about paying bills and being less (able to be) involved in community meaning some individuals shifted to other segments



My World Cost Conscious

22%

26%



Meanwhile My World Cost Conscious segment grew the most – reinforcing the idea that some Responsible Citizens have become less confident about bills



Family Focus

20%

18%



Closed World View

8%

11%



Young Disconnected**

3%

4%



Stretched and Struggling

11%

14%



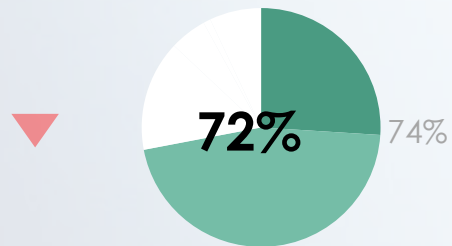
Appendix – Summary dashboards

Headline Dashboard 2020-21

- In spite of the challenges presented by COVID-19, satisfaction and the net promoter score remain resilient
- VFM falls slightly since last year, but only a directional change (not significant)
- Affordability and accessibility have improved since last year

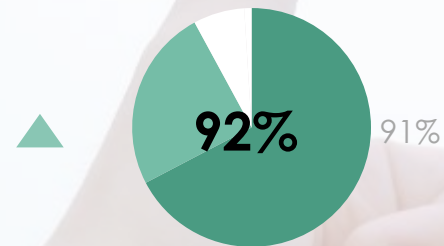
Value For Money

Overall



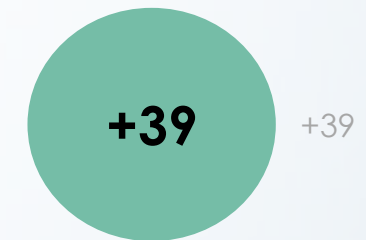
Satisfaction

Overall



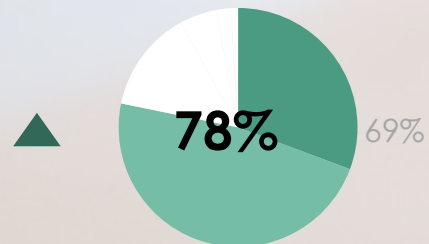
Net promoter score

Promoters (9-10) – Detractors (0-6)



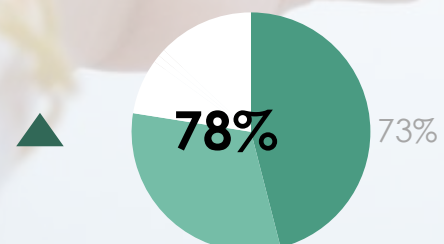
Affordability

Agree overall charges affordable



Accessibility

Combined metric: Range of contact methods & ease of understanding



Key

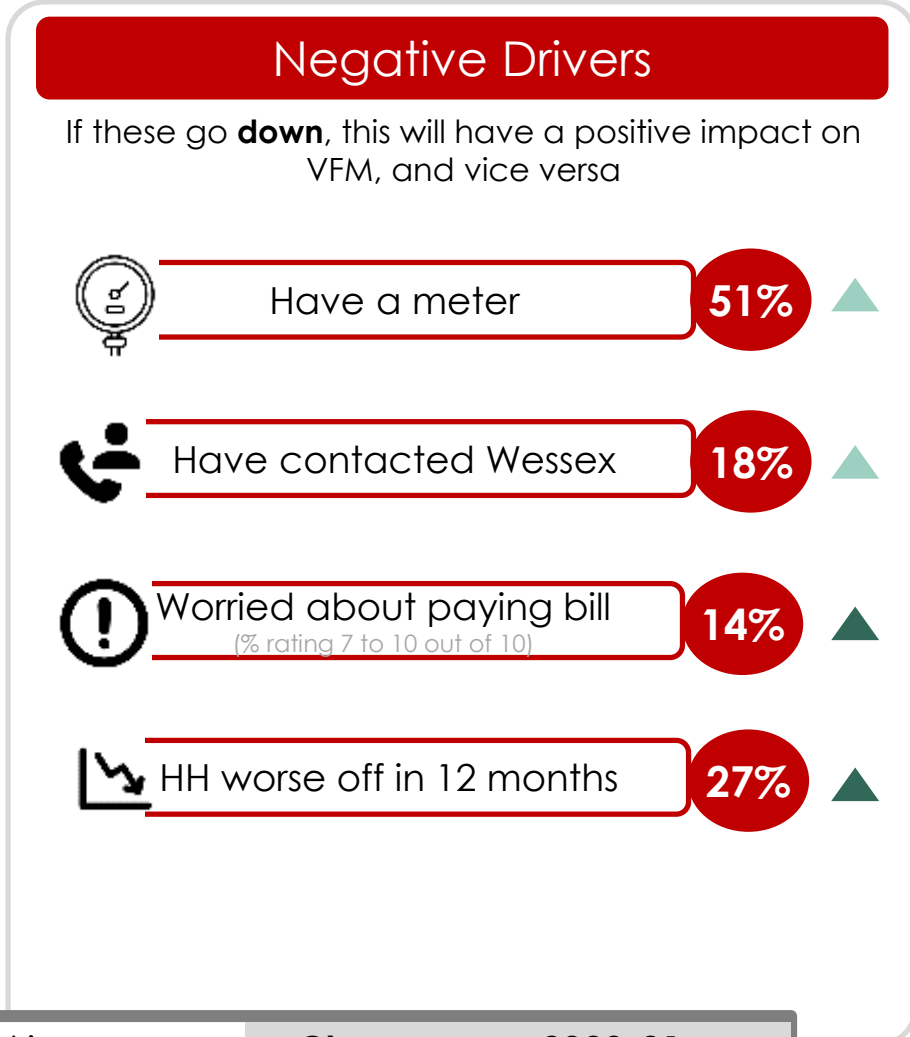
- Excellent / very satisfied / Strongly agree
- Good / fairly satisfied / tend to agree
- ▲ Significant increase
- ▼ Significant decrease
- ▲ Directional increase
- ▼ Directional decrease

xx% = previous year

Key Drivers of VFM (2020-21 vs 2019-20)

In 2020-21 there have been contradictory forces on how people feel about Wessex Water, household finances and bills. Positive movement in satisfaction with billing and in Wessex Water informing about spend are offset by greater underlying anxiety both about the bill and about household fortunes in general.

* Wording change in 2020-21 may have influenced result



Key: ▲ Significant increase ▲ Directional increase
 ▼ Significant decrease ▼ Directional decrease

Changes are 2020-21 vs. 2019-20

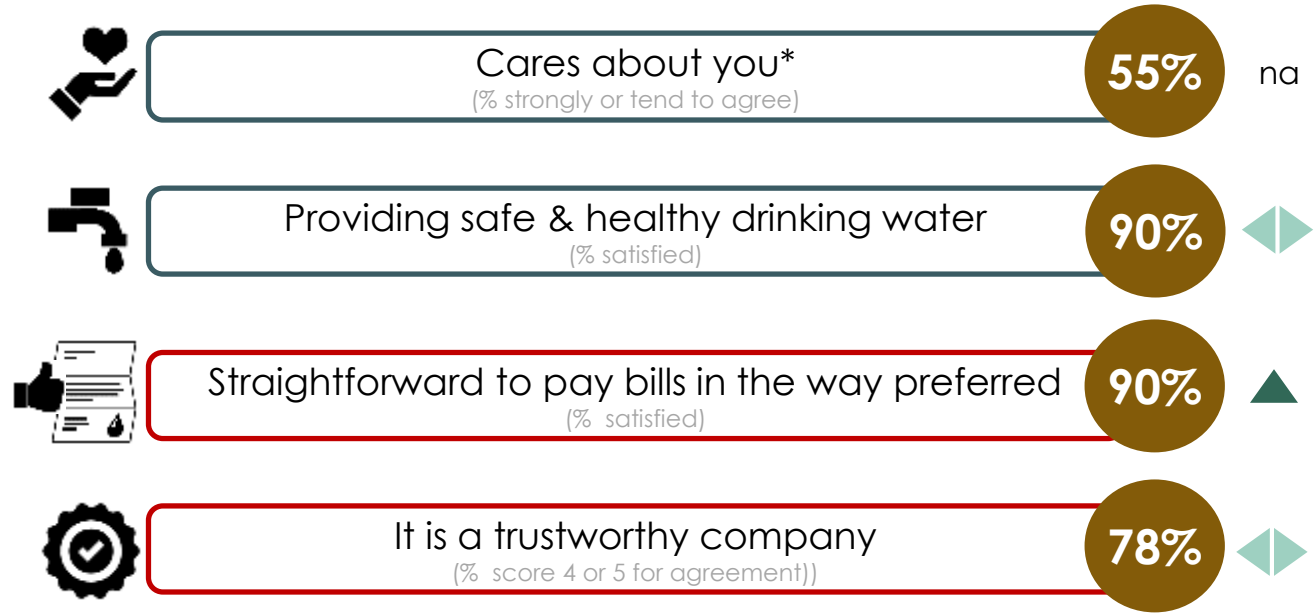
Key Drivers of Net Promoter Score

Beyond stated, 'top of mind' issues, we have identified some underlying drivers that have a degree of influence on the NPS (aside from VFM and satisfaction). If these drivers can be improved, we should see some positive response from the NPS. Most of these measures remain strong this year (although we are unable to directly compare 'cares for'), sustaining the NPS at the same level as last year.

Positive Drivers – Net Promoter Score

If these go **up**, this will have a positive impact on NPS

* Wording change in 2020-21 may have influenced result



Key: ▲ Significant increase ▲ Directional increase
 ▼ Significant decrease ▼ Directional decrease

Changes are 2020-21 versus previous year



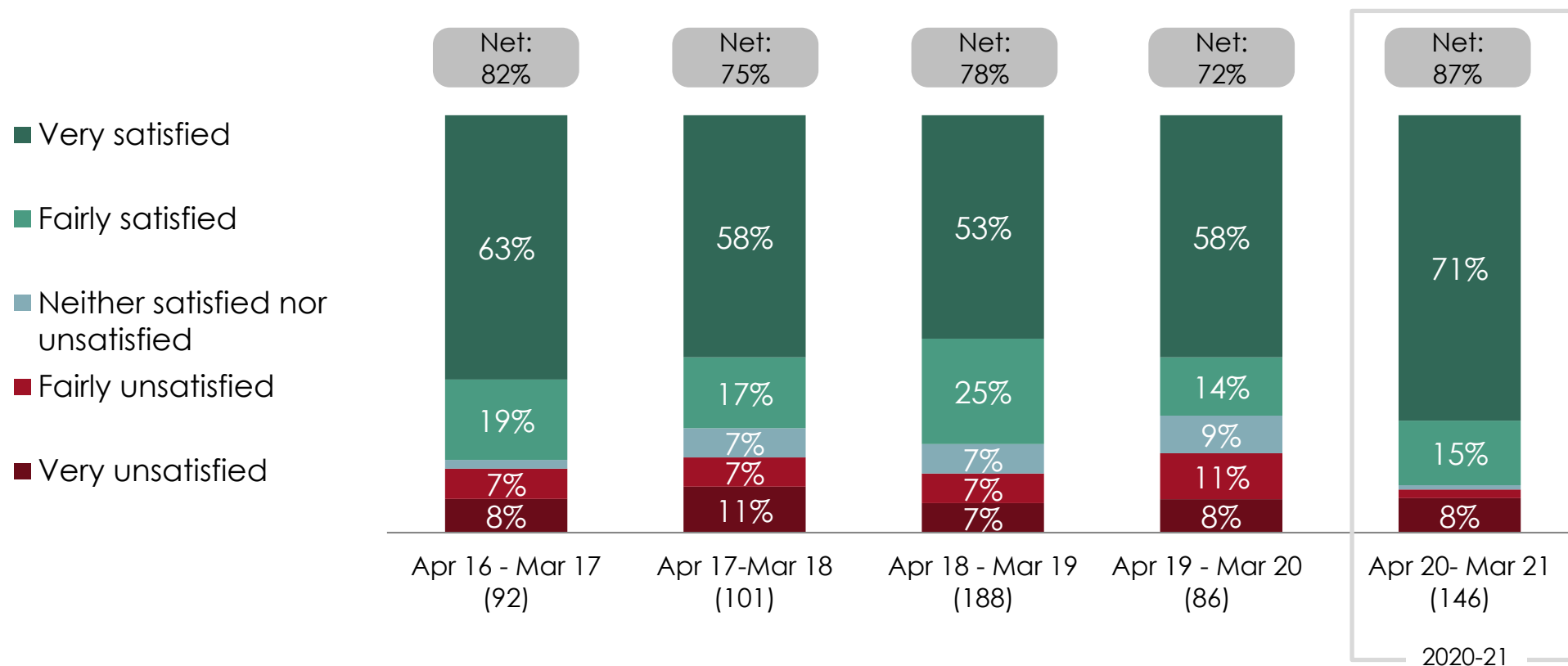
Appendix – Contact and queries

Satisfaction – dealing with queries

Amongst the minority of consumers who have been in contact with Wessex Water, the great majority are satisfied with how their query was handled. While base sizes are small, there are signs that this has improved during the pandemic.

Q8 And overall, how satisfied were you with the way your query was dealt with by Wessex Water?

(Base: Wessex solus customers and all Bristol and Bournemouth customers contacting Wessex about anything other than water supply)



CAUTION! LOW BASE SIZES

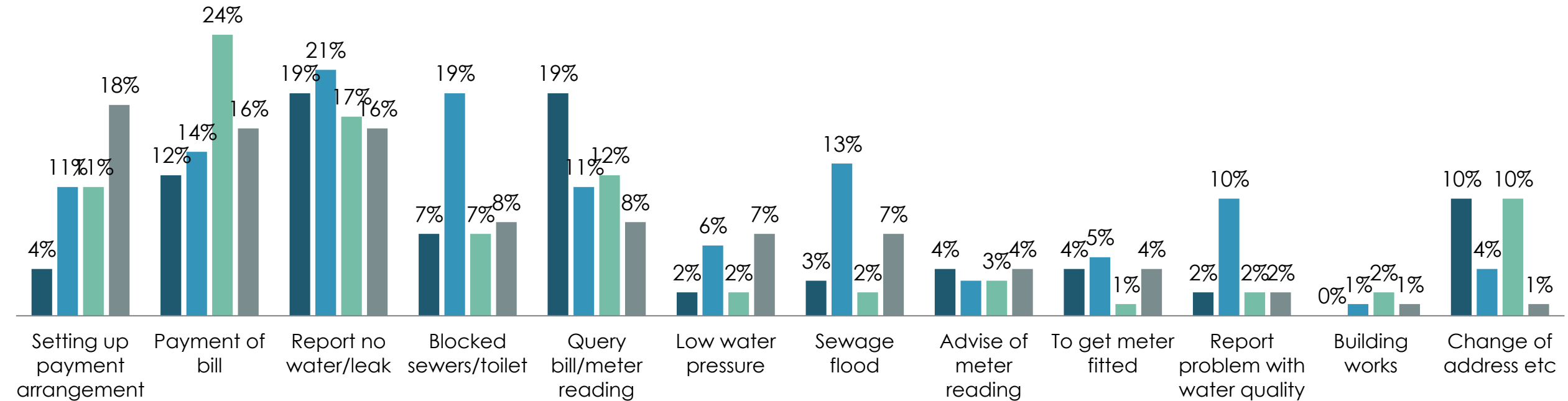
Reasons for contact

Amongst our sample who have contacted Wessex Water in the last year, there appears to be a higher incidence of querying bill / meter readings than previous years, and fewer setting up payment arrangements (as it is likely fewer people are moving house during lockdown)

Q6 (2b) What was the main reason for your contact?

Base: Contacted Wessex with a query relevant to Wessex

■ 2020-21 (164) ■ 2019-20 (86) ■ 2018-19 (188) ■ 2017-18 (101)





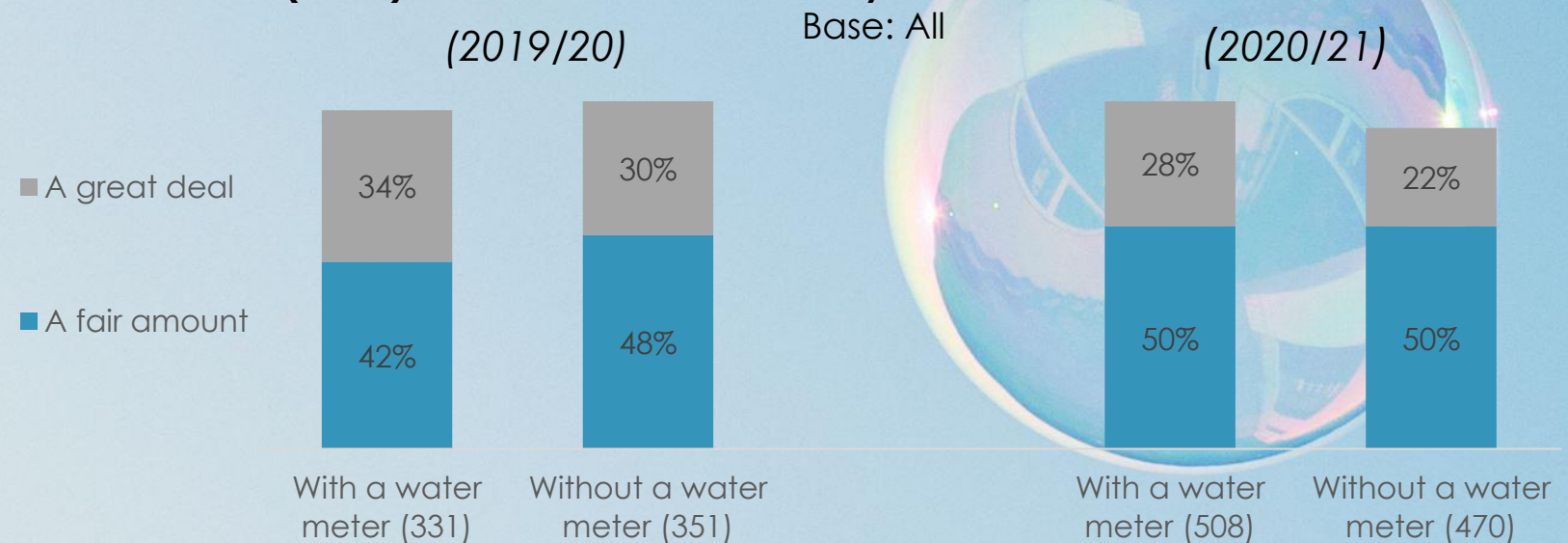
Appendix – Spotlight on...

Metering and water use

Indications that those with a water meter are slightly more likely than those without a meter to make 'a great deal of effort to save water' – is this related to efforts to reduce the bill? This is an area we will look to explore in the tracking survey for 2020-21. On average, those with meters also estimate their bill is slightly lower.

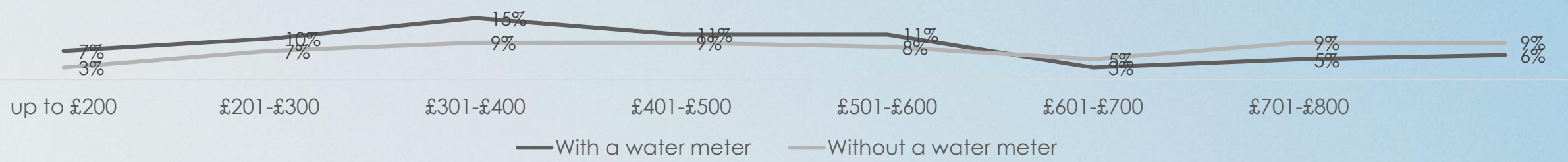


(QF1a) How much of an effort do you make at home to save water?



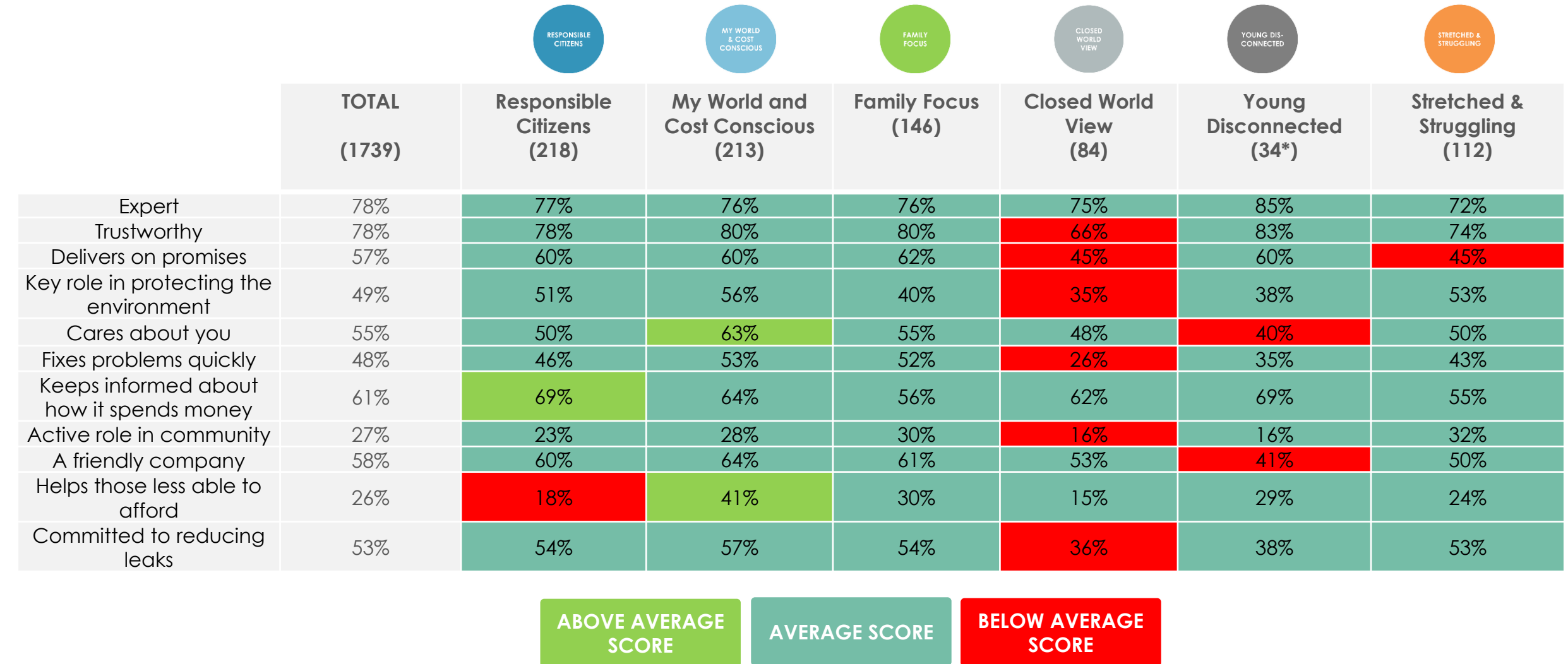
Q20 - Roughly how much do you think you currently pay, combining your water supply and sewerage service?

Base: All bill payers 2020-21



Wessex Water imagery by segment 2020-21

Indications that My World Cost Conscious actively feel that Wessex Water is caring for them, and actively helping those less able to afford. Meanwhile Stretched and Struggling do not have this strength of association – is it possible to engage with them more in future in these areas?



KEY: * Caution low base size ** Caution very low base size. Figures are % agree with statements about Wessex.

Bill payers versus non-bill payers: Awareness and attitudes

	Total (1,000)	Bill payers (815)	Non bill payers (185)
Spontaneous <i>DON'T KNOW</i> who provides water	14%	11%	25%
Spontaneous awareness Wessex provides sewerage service	61%	65%	44%
Satisfied	92%	93%	88%
Image statements Non-bill payers slightly lower for 'informed about spend'; 'helps those less able to afford'			
NPS	+39	+40	+35
VFM	72%	73%	68%
Seen on social media	9%	8%	14%
Used website	18%	18%	20%
Seen magazine	56%	59%	46%
Contact?	18%	19%	13%
Aware of bill assistance	30%	33%	20%
Aware PSR	41%	43%	32%
A great deal of effort to be environmentally friendly	31%	30%	36%

Bill payers versus non-bill payers: Demographics

	Total (1,000)	Bill payers (815)	Non bill payers (185)
ABC1	58%	60%	50%
C2DE	41%	39%	49%
One person in HH	17%	19%	9%
16-34 years old	31%	27%	47%
35-54	31%	33%	24%
55+	34%	37%	24%

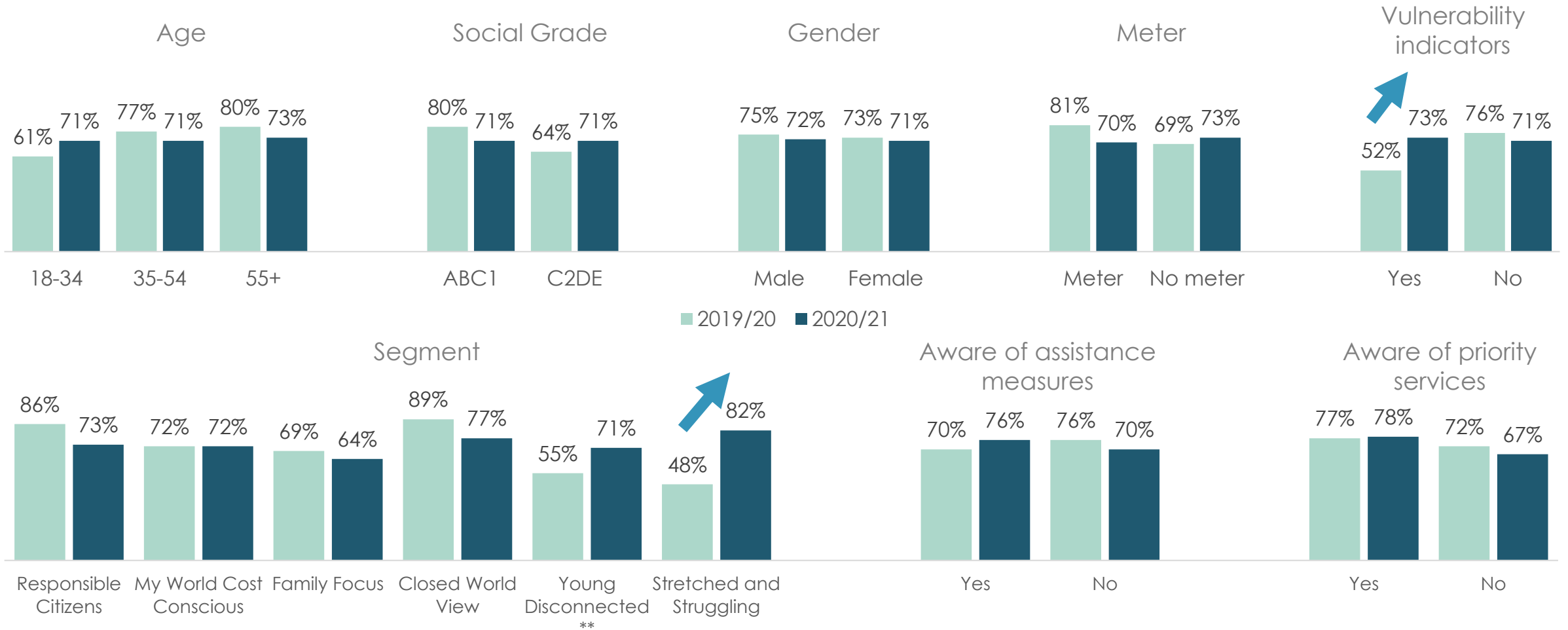
A close-up photograph of a fountain pen nib, showing the intricate details of the writing tip. The nib is dark, possibly black or dark blue, and is set against a light, neutral background. A semi-transparent teal horizontal band is overlaid across the middle of the image, containing the text "Appendix - Additional detail" in white. The nib's tip is the central focus, showing the fine lines and the texture of the metal. The background is softly blurred, highlighting the sharp details of the nib.

Appendix - Additional detail

Overall VFM by key groups – versus last year only

Since last year there has been an equalisation of VFM ratings across different groups – improving notably for ‘Stretched and Struggling’ segment, vulnerable and younger consumers. Various support initiatives (both by Wessex and more broadly) in response to Covid-19 may have played a part.

Q22. How would you rate drinking water supplies and the sewerage service you receive in your area in terms of value for money? % ‘Very good value’ or ‘Good value for money’. Base: All 2019/20 / 2020-21

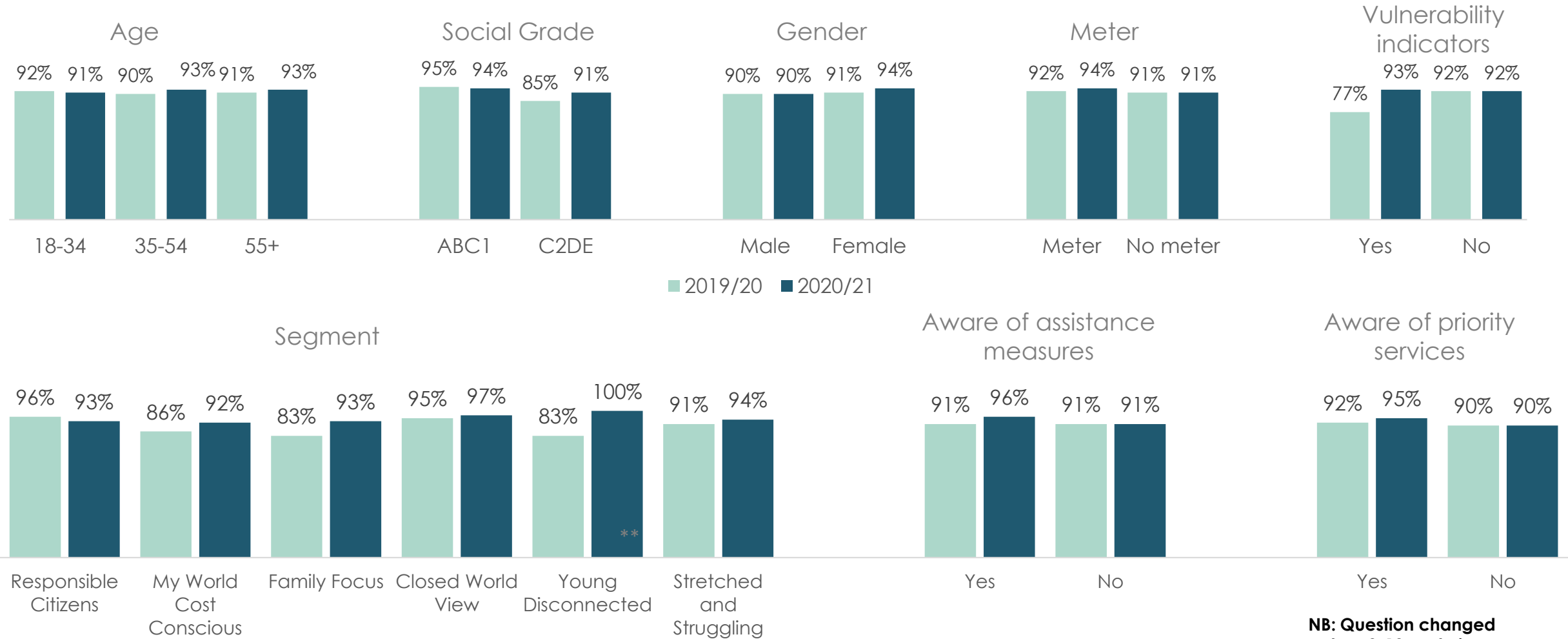


* CAUTION Low sample size (<80); **CAUTION Very low sample size (<50). Data is indicative only

Overall satisfaction by key groups – versus last year only

The key group notably lagging behind for satisfaction last year was those with potential vulnerabilities. Post Covid-19 this group have now caught up with the rest – is this related to Wessex Water actively responding to needs of those who require added support?

Q15 How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?
% Very satisfied or fairly satisfied (Base: All 2019-20, 2020-21)



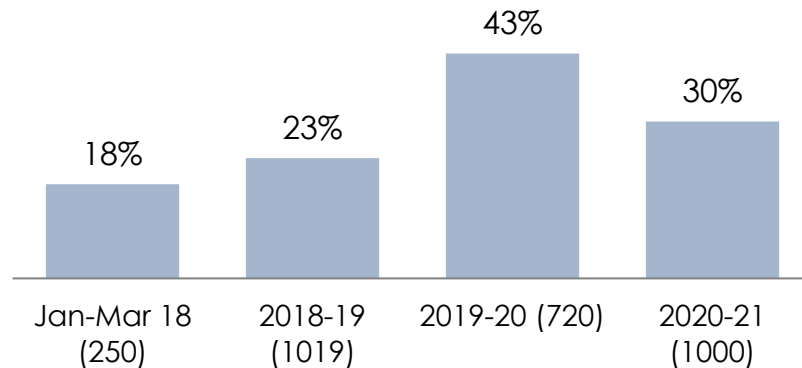
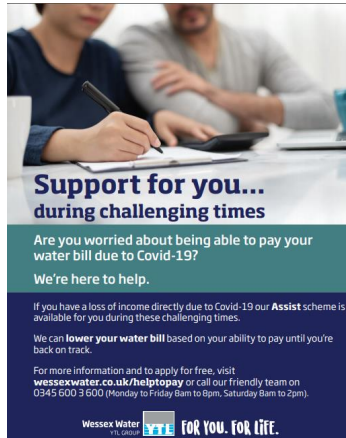
** CAUTION Low sample sizes (<80) – indicative only

NB: Question changed to a 0-10 scale in 2020-21

Awareness of Assistance Measures – by year

Immediately post-Covid there was a dip in awareness of Wessex Water’s financial assistance measures – these may have been overshadowed by other new high profile Covid-related support (e.g. furlough). Meanwhile awareness of other (priority) services from Wessex have held up well.

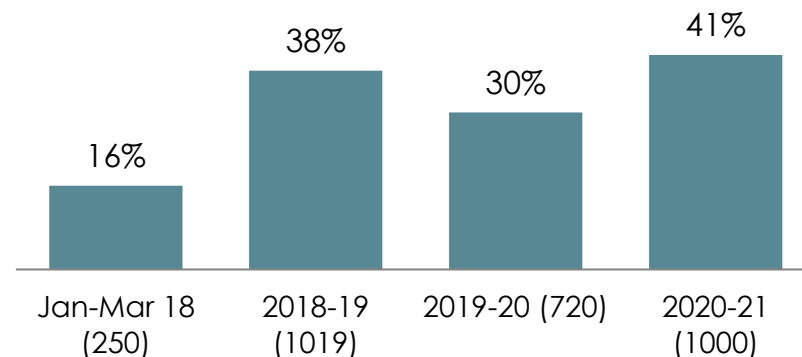
QF10 Are you aware of any kind of assistance that Wessex Water offers for customers **who struggle to afford their water bill**? (Base: all respondents)



30%
Aware for 2020-21
(33% of bill payers)

- Higher amongst:**
- Responsible Citizens (38%)

QF12 Are you aware of any additional services offered by Wessex Water? These are also known as **Priority Services**? (Base: all respondents)

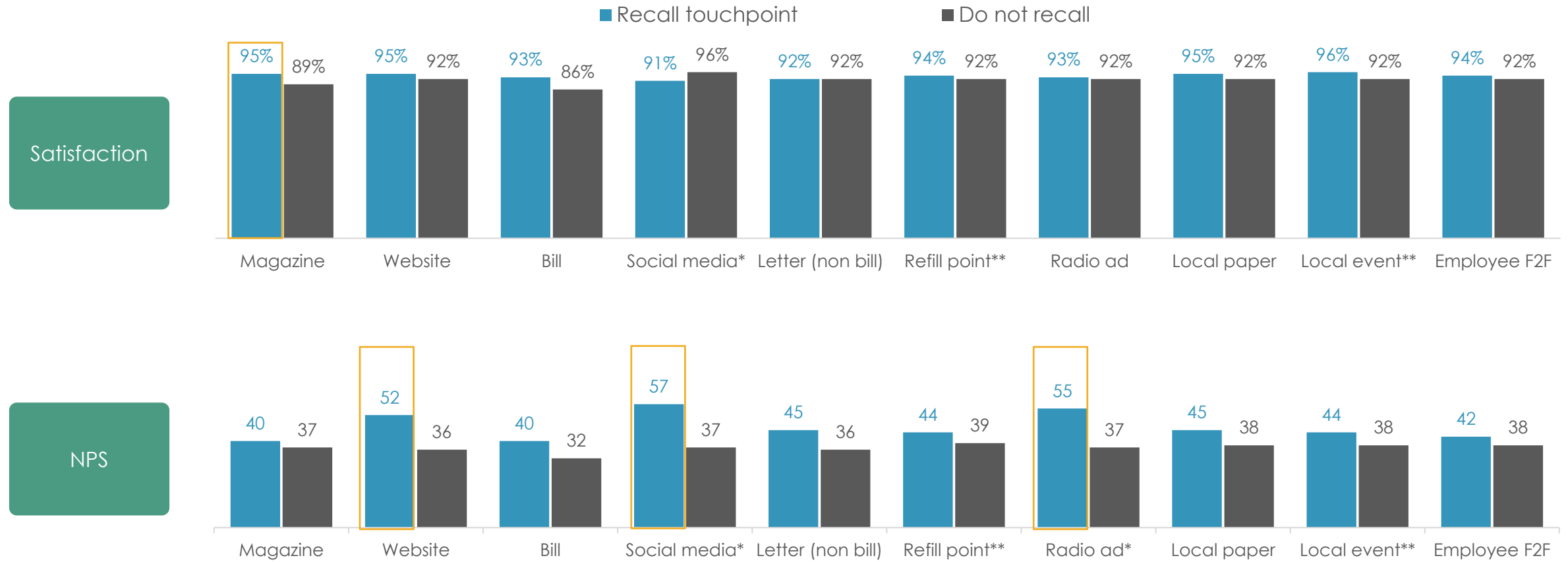


41%
Aware for 2020-21
(43% of bill payers)

- Higher amongst:**
- Those who recall Wessex Water social media (60%) and magazine (50%)
 - Family Focus (49%)
 - My World Cost Conscious (47%)

Relationship between channel recall and satisfaction, NPS (2020-21)

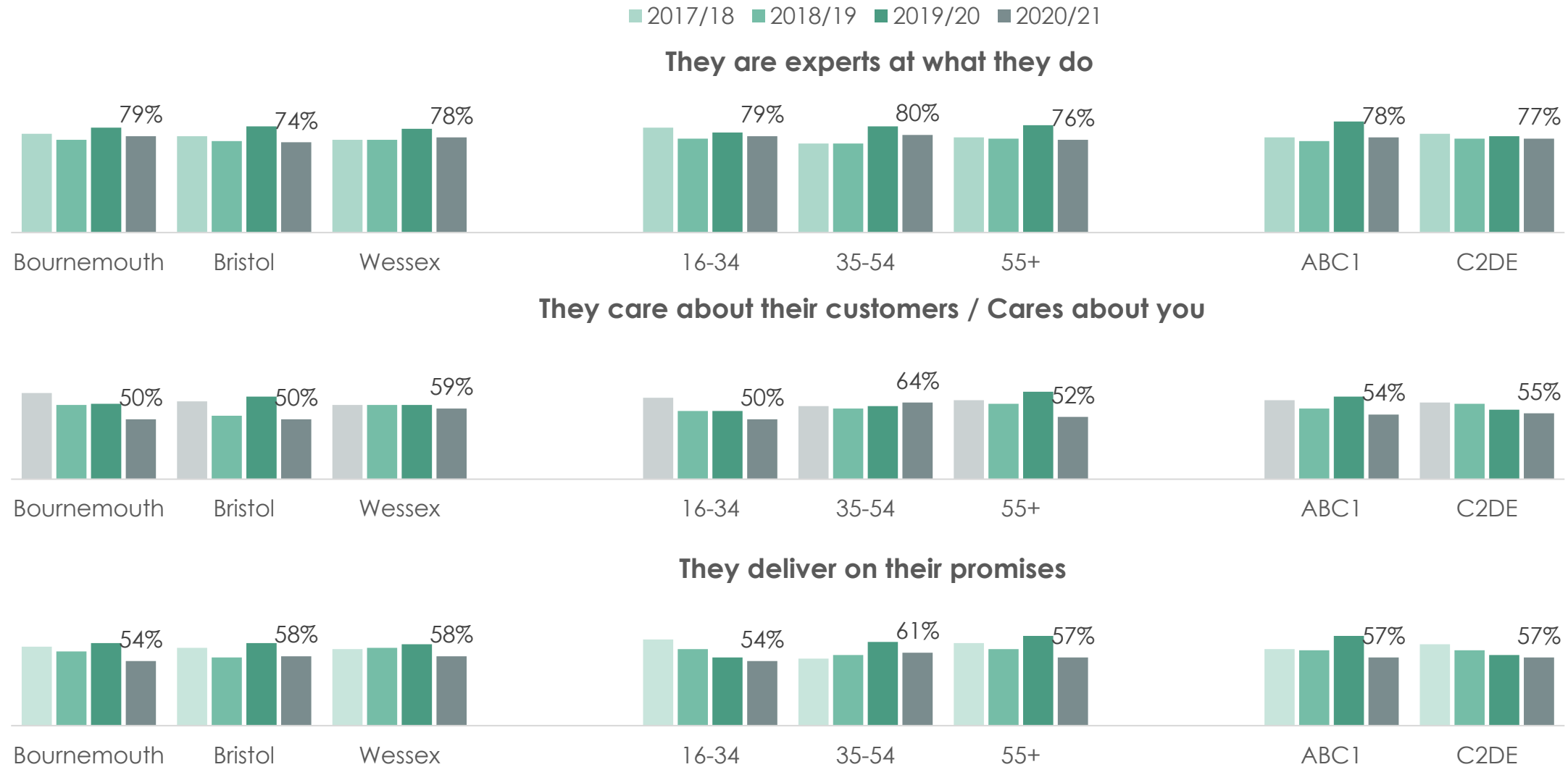
Underlying satisfaction is high, regardless of which touchpoints are recalled. NPS is a more highly variable measure - significantly higher amongst those who recall Wessex Water on social media, on the radio, or who have used the website (are these channels acting as more effective brand 'halo'?)



Base sizes (Recall / Don't recall): Magazine (628/372); Website (147/853); Bill (901/99); Social media (76*/924); Letter (non bill) (268/732); Refill point (44**/946); Radio ad (74/926) / Local paper (129/871) / Local event (54*/946) / Talk to employee (147 / 853) KEY: * Caution low base size ** Caution very low base size

Components of Trust

'Expert' remains a strong impression of Wessex Water across all sub groups. The wording change in the statement about 'care' coincides with a drop in endorsement for most subgroups.





Appendix – Communications images

FOR YOU. FOR LIFE.

Flight of the Birdgirl

Mya-Rose Craig, conservationist and campaigner - page 5



Meet our people
Keeping your water top quality - pages 6 to 7

Meet Drop and Plop

Activities for children - pages 8 and 9



Back to school

Book a virtual session with us - page 20

Wessex Water Foundation

Supporting communities in your area - pages 14 to 18

The flight of the Birdgirl



Black2Nature is one of the many local charities supported by the Wessex Water Foundation. Founder Mya-Rose Craig explains why she set up the charity and how funding will support young people to reconnect with nature following the Covid-19 pandemic.

As an 18-year-old British Bangladeshi birder and conservationist, I have experienced first-hand the lack of diversity of people enjoying green spaces around me. Lockdown has highlighted and reinforced how important it is for us as humans to get outside into nature and green spaces. The consequences of staying cooped up indoors can have terrible detrimental effects on our mental and physical health.

I founded the charity Black2nature in 2016 to tackle the lack of ethnic diversity in the nature sector and to also give opportunities to inner-city children and young people particularly from VME communities to engage with nature. It is important to have people from all communities enjoying natural spaces to promote community cohesion and so that everyone can use connecting with nature to benefit their mental health.

Black2Nature runs one-day primary age and two-day

Not being able to get outside and into nature has a particularly big impact on teenagers, as we are used to going to school, seeing lots of friends and socialising in big groups. I have been on a gap year since the end of Apr 2020, with almost all my friends going away to university. I have been busy working and writing a book, but I have had almost no contact with other people my age. I have managed to survive because I have been able to fall back on birding and nature to keep me well.

Visible Minority Ethnic (VME) people suffer much higher incidences of mental illness, with those incidences being much more serious and more likely to have been diagnosed within the criminal justice system. There is very little research on the subject as to why this is happening except that it is thought that the pressures of living dual lives, coping with racism and mental health stigma are contributing factors. The statistics are appalling, with 60% of those admitted into mental health hospital wards being VME whilst the national average of the population that is VME is 14%.

Maintaining essential services



It's been a year of adaptation and change, but we've made sure you have everything you need to drink... which, look and clean as we continue to keep water and sewerage services running as normal. One of our water quality inspectors, who ensures your drinking water meets the highest possible standards. To help us stay safe and fight coronavirus we have all been using more single-use plastic from gloves to masks. This year we are helping communities to make a commitment to change from single-use plastic by moving to refill our bottles. We have been working with local councils across our region to install water refill points to reduce the use of single-use plastic water bottles.

Support for you... during challenging times



We know life can be unpredictable, it's why we offer a range of support, from alternative payment arrangements through to our affordability plans, to best fit your personal circumstances. If you've been unable to work during the pandemic and your finances have been affected, perhaps due to redundancy or being self-employed, we can also help by lowering your bill until you're back on track. Get in touch today and find out more about the support we offer, visit wessexwater.co.uk/help/day or call our friendly team on 03-45 600 9 600 (Monday to Friday 9am to 8pm, Saturday 9am to 2pm).

WELCOME

Welcome to the latest edition of our magazine. Thanks for joining us as we delve into how we spot leaks and keep the water supply going. We meet Abbie, one of our water quality inspectors, who ensures your drinking water meets the highest possible standards. To help us stay safe and fight coronavirus we have all been using more single-use plastic from gloves to masks. This year we are helping communities to make a commitment to change from single-use plastic by moving to refill our bottles. We have been working with local councils across our region to install water refill points to reduce the use of single-use plastic water bottles. There's lots more to read. Find out how we are working smarter, committed to achieving net zero carbon emissions from our day-to-day operations by 2030, and how we are partnering with Government, Local Councils and other organisations to improve our services and reduce our carbon footprint. You can read more about some of the other great

people and projects the 2020 Recovery Fund supported on pages 14 to 18. As life is starting to get back to normal and restrictions ease, children returning to the classroom could benefit from their educational offering. From 19 April we will start welcoming school and other groups to visit our water and sewerage treatment works. We also offer virtual sessions on Zoom on Microsoft Teams. Children can learn all about what we do in the classroom. To book a visit or virtual session visit wessexwater.co.uk/education.

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Marley Smith
Group Director of Communication & Community

We want to hear from you... write to us at editor@wessexwater.co.uk or call our editorial team on 0345 600 9 600. We will only publish letters that are short, clear and relevant. We reserve the right to edit letters for clarity and to ensure they are appropriate for our readers.

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FOR YOU. FOR LIFE.

The learning never stops

Our education advisers explain what we have to offer - pages 26 to 27

Winter tips for your home

How to protect your home and garden - pages 6 to 7

The hard facts of water

What causes limescale - pages 12 to 13



In your area
What's been happening in your community - pages 14 to 21



DISCOVER OUR ONLINE RESOURCES

The team can support your learning goals virtually as well - either through an online workshop at your school or college, or even in the comfort of your living room.

"Our service is all about designing an education programme that ties in with teaching plans and class



objectives. To help with lesson planning we've also created an array of KS1 and KS2 resources and videos that parents, teachers and children can download for free," explains Meghan.

"We have produced science investigations, fact files, joke poo recipes, information about the water cycle and sewerage treatment, plus loads more."



Tim, our education adviser in Dorset, added: "We are also looking to expand our resources to ensure they are relevant to the latest curriculums at schools. These resources will cover a range of topics, such as climate change, flood alleviation and biodiversity. Additionally, we are busy making KS3 and KS4 resources."



Our education team are ready to assist in a range of online and offline learning.

BOOK A FREE VISIT

You can download our free education resources and register in a free visit or future site tour by visiting wessxwater.co.uk

"EDUCATING PEOPLE ABOUT WATER, WASTE AND HOW TO CARE FOR THE ENVIRONMENT"

in the news

Pete Orchard provides a round-up of how we've made the headlines

Prize from customer watchdog

We have again been singled out as a top performer in the annual Consumer Council for Water (CCW) complaints report.

The number of written complaints received from customers in 2019/20 fell by 23% while there was a massive 40% reduction in Stage 2 complaints, where the cost of service is higher.

This year's report - which also featured complaints made via social media, webchat, 24/7 and in person - is rated as one of four standard performance categories.

The water industry regulator Ofwat had placed a target of 17 complaints in its new 'C' category, which measures the quality of service delivered to customers. "We're committed to going the extra mile for our customers and talking our support to their needs into account," said director of customer policy and engagement Leah Clarke.

Volunteers dig deep for Dorset green school

Parade Primary school in Blandford, Dorset, created a new vegetable growing area for children with help from two of our Water Force volunteers.

General foreman Gordon Lawford and repair and maintenance team leader David Cole visited the school with an excavator on a Saturday to help dig holes for the planting, ensuring children from different local backgrounds could learn and play outdoors safely without having to rely on productive equipment.

Pre-school manager Alison Harris said: "We were so grateful to Gordon and Dave for giving us their time to help us out."

"They worked very hard and it wasn't easy as the ground was so hard, which means we had to use a lot of effort to get the soil delivered to customers. "We're committed to going the extra mile for our customers and talking our support to their needs into account," said director of customer policy and engagement Leah Clarke.

Awards recognise environmental commitment

Our environment and planning services colleagues were named Best Team from large organisations at this year's RSK Sustainability Impact Awards.

These award winners and business leaders are leading environmental issues in sustainable and innovative ways, such as our in-house road detection tool. They also highlighted our collaborative approach with regulators and other organisations as key to our success.

Sarah Matthews, CEO of the Institute of Environmental Management and Assessment (IEMA), said: "Action to tackle the climate and environmental crises we face requires business and industry to take ownership and our industry to help lead and be the transformation and change leaders."

Meanwhile, our engineering and sustainable delivery team were named as the best team in the world for their work on the Four Seasons in four years project to upgrade our high water sewerage system. The government has since announced it will allow the water industry to raise the number of basins to remain after the long-term investment in infrastructure 2020 awards, which will benefit the local area and the environment.

Helping to bring back the beloved beaver

A five-year beaver trial on the River Otter has been completed with support from a number of organisations, including us.

The trial, which was led by Devon Wildlife Trust, started in 2015 and has resulted in the first group of beavers being successfully bred throughout the catchment.

Beavers migrated on to our land which is connected to the river, and we've worked with the trust to make sure it's a haven for them - while also ensuring we can continue to provide a safe and secure water supply.

We've also supported the University of Exeter with funding for monitoring equipment to help understand the beaver's impact on the river. The government has since announced it will allow the water industry to raise the number of basins to remain after the long-term investment in infrastructure 2020 awards, which will benefit the local area and the environment.

Understanding our rivers

Embracing the natural world has never felt more important than in this difficult year, and we all have a responsibility to safeguard it. Future wild river openings are popular in parts of our region, such as the idyllic Moleigh Weir near Bath, and we understand that people want to know more about our treatment of sewage at nearby water recycling centres.

In September we joined volunteers and collaborators to monitor the water quality of the River Avon, taking samples from 22 sites between Marlborough and Melksham as well as the tributaries which meet the Avon between these sites.

There is a campaign to make borough the UK's first river with designated bathing water status, similar to coastal sites where we treat waste water with ultra-soft "high-quality" water. This process is costly and can have a massive environmental impact through carbon dioxide emissions. Currently, the treated waste water released into rivers meets different standards. This means it has no adverse effect on the environment but may not meet bathing water standards.

We believe river bathing water status is achievable but it will require significant investment, collaboration and changes in government legislation. We believe river bathing water status is achievable but it will require significant investment, collaboration and changes in government legislation. We believe river bathing water status is achievable but it will require significant investment, collaboration and changes in government legislation.

Mark Wheldon, our director of assets and compliance and a wild swimmer himself, said: "Storm overflows operate during heavy rainfall to protect homes and businesses from flooding and rarely cause a pollution - in fact, there were none in our region last year when overflows operated as designed."

"Our pollution that came from overflows was due to blocked sewer's downpipes, caused by a combination of wet weather that had been heavily flushed and fat poured down drains. "It's predominantly rainwater that is released from CSOs due to the sewerage network reaching capacity but we agree that they are unacceptable in 2020 and we support any ambition to reduce the number of times they operate. CSOs are a legacy of a time when most UK properties were built with only one pipe to drain both foul water and storm water. Even today, developers still have the right to connect surface water to sewers that carry foul water. "This has to change and we made illegal if we're serious about getting rid of them."

Image Tracker 2019-20

Annual presentation
19th May 2020

VFM & Bills

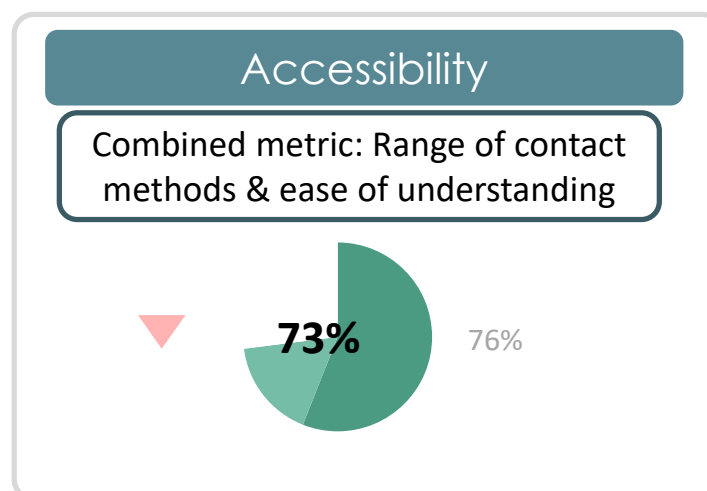
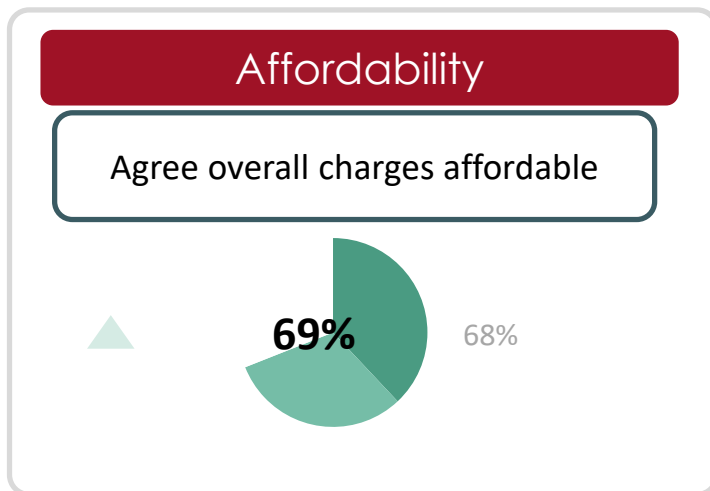
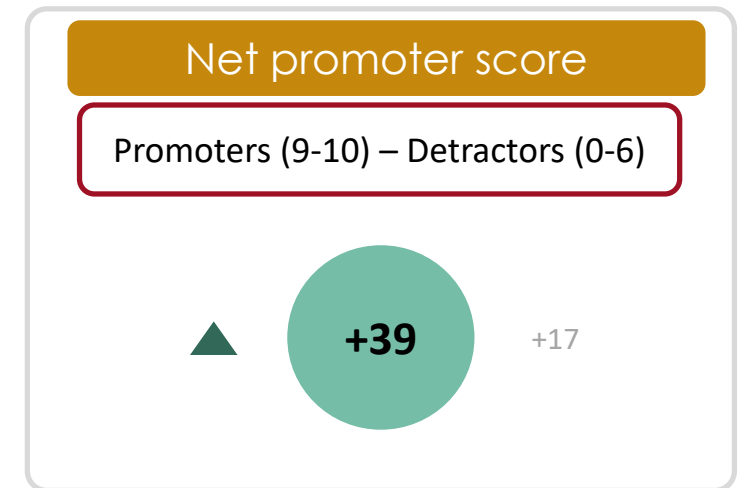
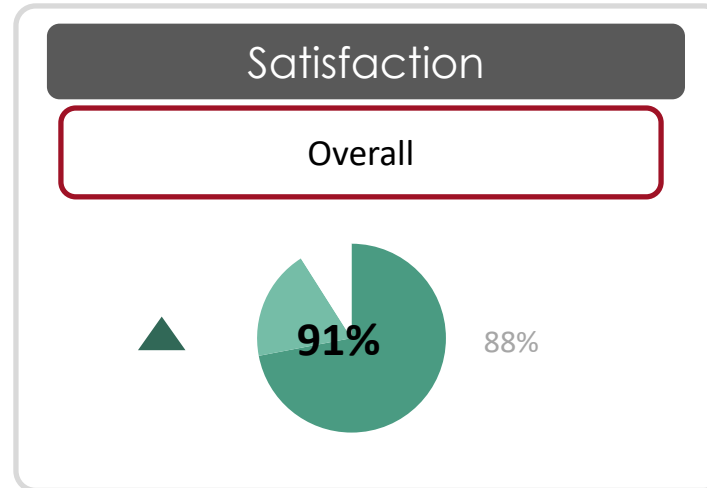
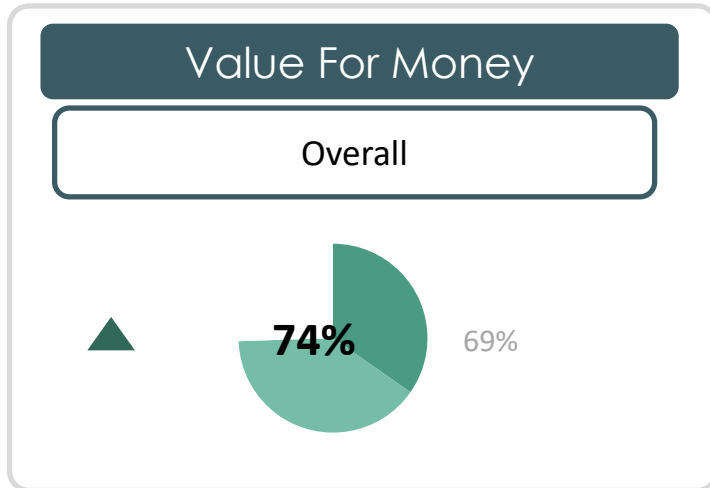
Satisfaction &
NPS

Affordability

Image &
Communication

Summary

- Interviewing for 2019-20 was complete before the onset of COVID19 – the pandemic will have no impact on results
- Value for money has rebounded from a low point last year
- Satisfaction is slightly higher than last year, Net promoter score is up



Key

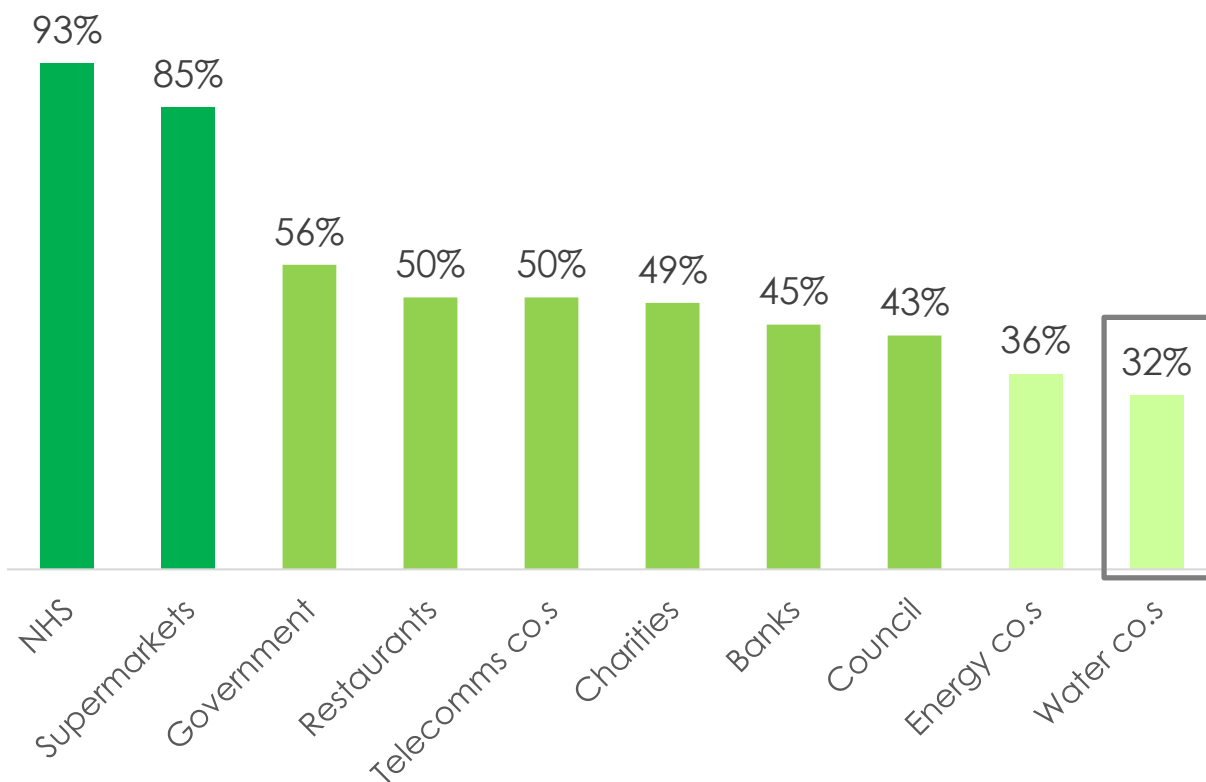
- Excellent / very satisfied / Strongly agree
- Good / fairly satisfied / tend to agree
- ▲ Significant increase
- ▼ Significant decrease
- ▲ Directional increase
- ▼ Directional decrease

xx% = previous year

The changing consumer perspective

- We must be mindful of imminent changes in consumer outlook in light of COVID19
- Our nationwide data from early May shows how water companies, as yet, have been more 'recessive' than organisations in other sectors, and how widespread anxiety and money concerns have become.

How well have...responded to the coronavirus outbreak in the UK?
% 'very well' or 'fairly well'



Thinking about the last month, have you done/felt each of these more, less or about the same as before the coronavirus outbreak?

	More than	About the same	Less than
Feeling uncertain about my future	53%	41%	5%
Feeling stressed	48%	41%	11%
Worrying about money	39%	52%	9%
Exercising regularly	28%	40%	32%
Feeling connected to my local community	27%	54%	19%
Eating healthily	23%	54%	23%

Base: All GB adults aged 18+ (n=2,025). Fieldwork conducted online between 1st May and 3rd May 2020.

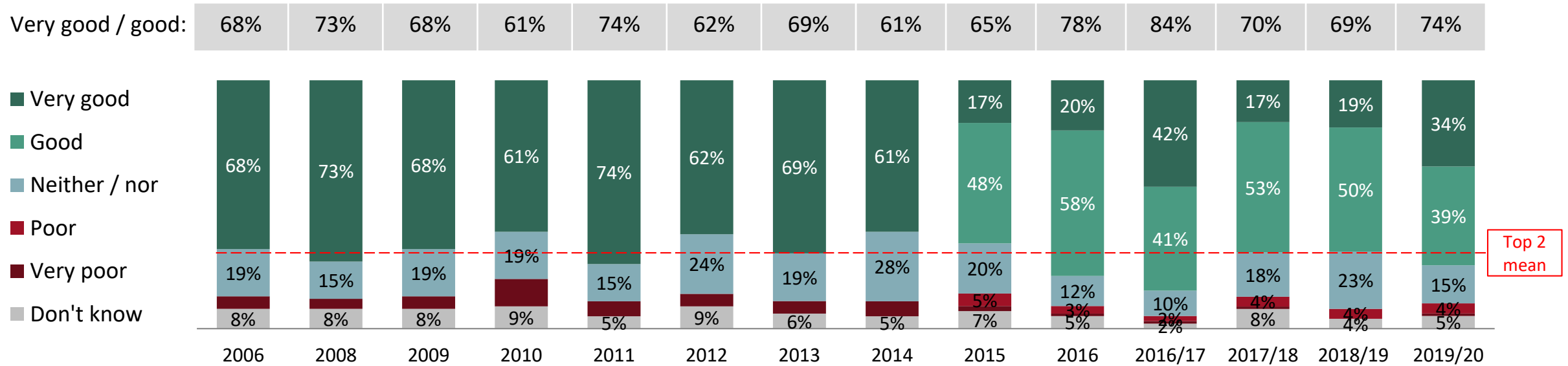


Value for Money and Bills

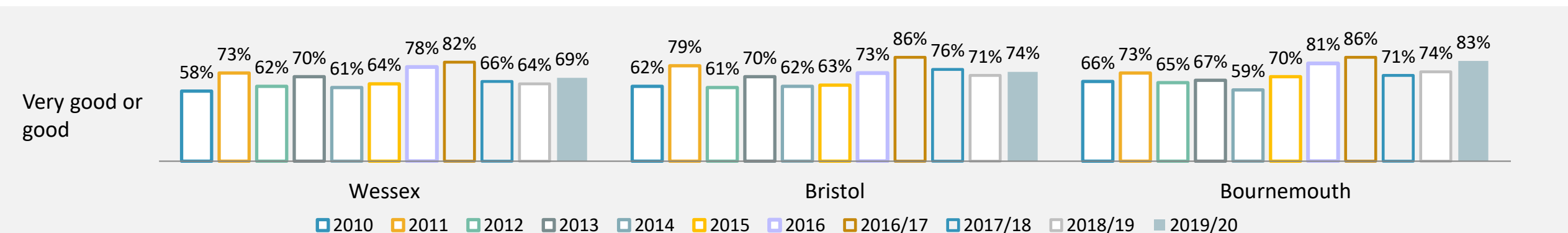
Overall value for money (VFM)

Prior to lockdown, the overall VFM rating for Wessex Water is 74% - higher than last year. There's improvement for all three regions, although the Wessex supply area remains slightly lower than the others (reflecting higher average bills).

Q22 (Q5) How would you rate the drinking water supplies and the sewerage service you receive in your area in terms of value for money? (Base: All)



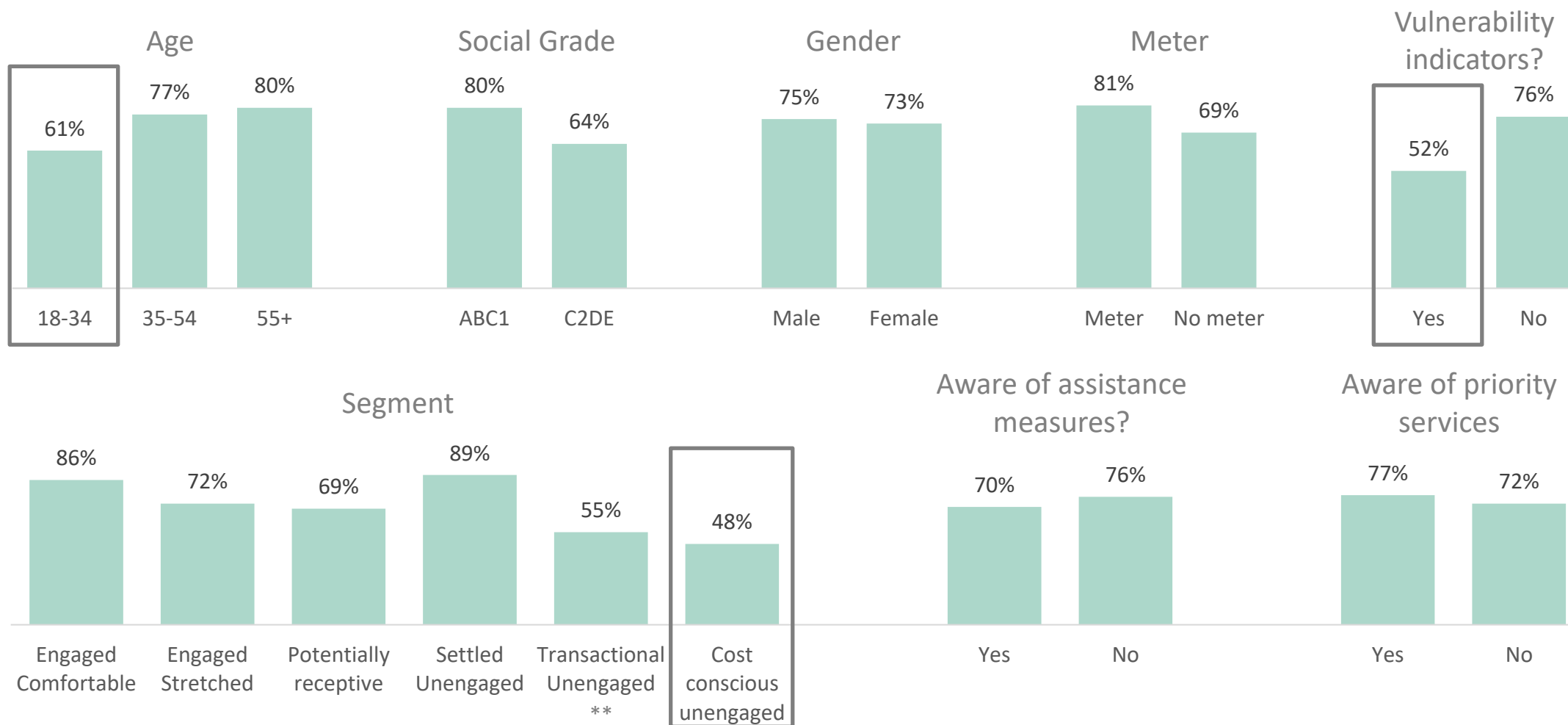
Top 2 mean



Overall VFM by key groups

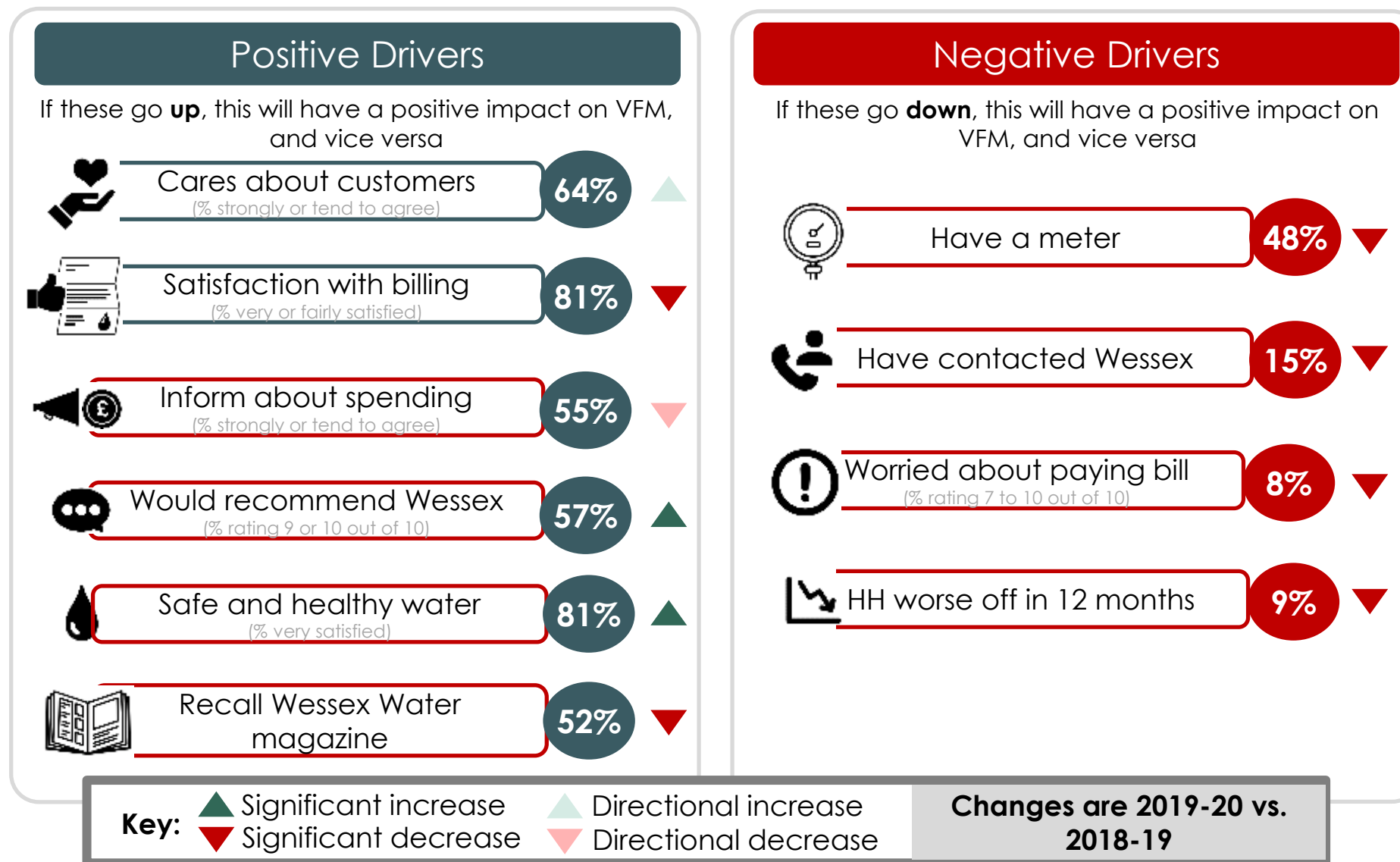
VFM has most scope to improve amongst younger customers, those who may be vulnerable, and notably the 'cost-conscious unengaged' segment. Innovation may help to target and engage with these specific customer groups.

**Q22 How would you rate drinking water supplies and the sewerage service you receive in your area in terms of value for money?
% 'Very good value' or 'Good value for money' (Base: All, 2019-20)**



Key Drivers of VFM (2019-20 vs 2018-19)

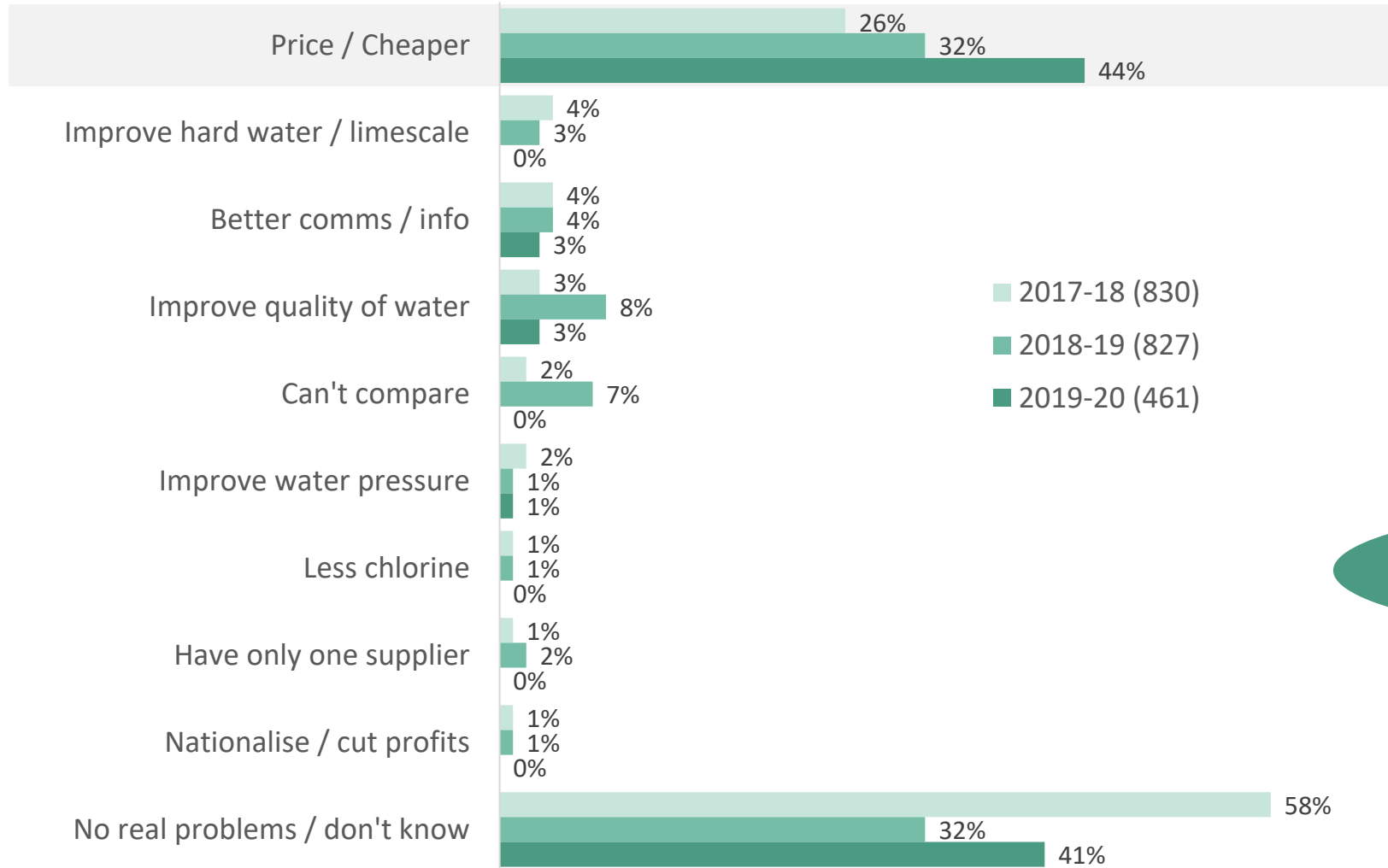
In 2019-20, even with slight declines in satisfaction with billing and in recall of the magazine, a number of other key drivers improve - promoting a higher VFM score than last year.



Improving VFM...

A clear focus on the price side of the value equation; in other respects most customers are satisfied with what they receive – relatively little scope to improve in terms of quality of delivery.

Q23. Can you say in your own words what would improve your view on value for money?
 (Base: All who do not say 'Very good value for money')



Could be cheaper

Too expensive compared to other water companies

We can always do with cheaper bills, we get good service, good water quality

In the past we had a strange taste to the water...it was as if there were too many chemicals

As I said we get a good service, water is very drinkable, pressure is good, no problems I can think of

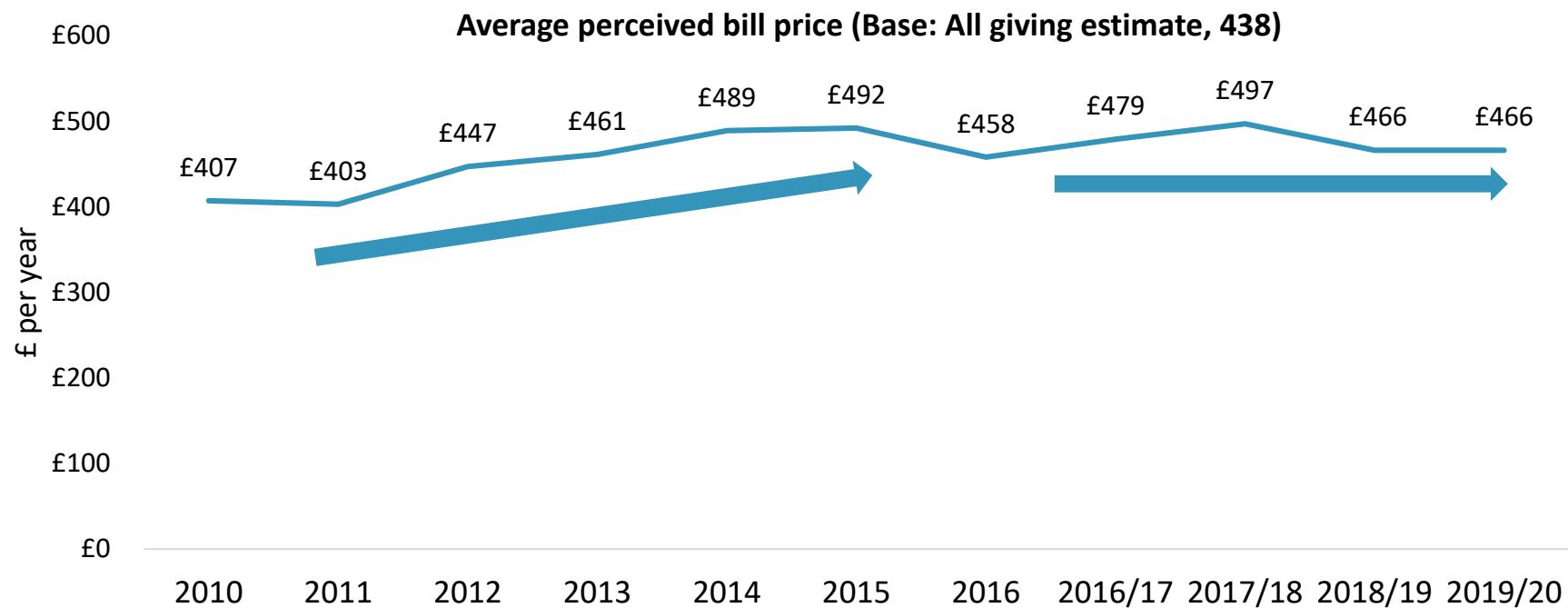
Perceived bill size

Under two thirds of customers can give an estimation of their bill size – fewer than last year. Plenty of scope to improve bill ‘salience’. Of those giving an estimate, the average perceived bill price is similar to last year – signs of stabilising.

Q20 Roughly how much do you think you currently pay, combining your water supply and sewage service?
 (Base: All 2019-20)

39% don't know
 vs. 32% last year

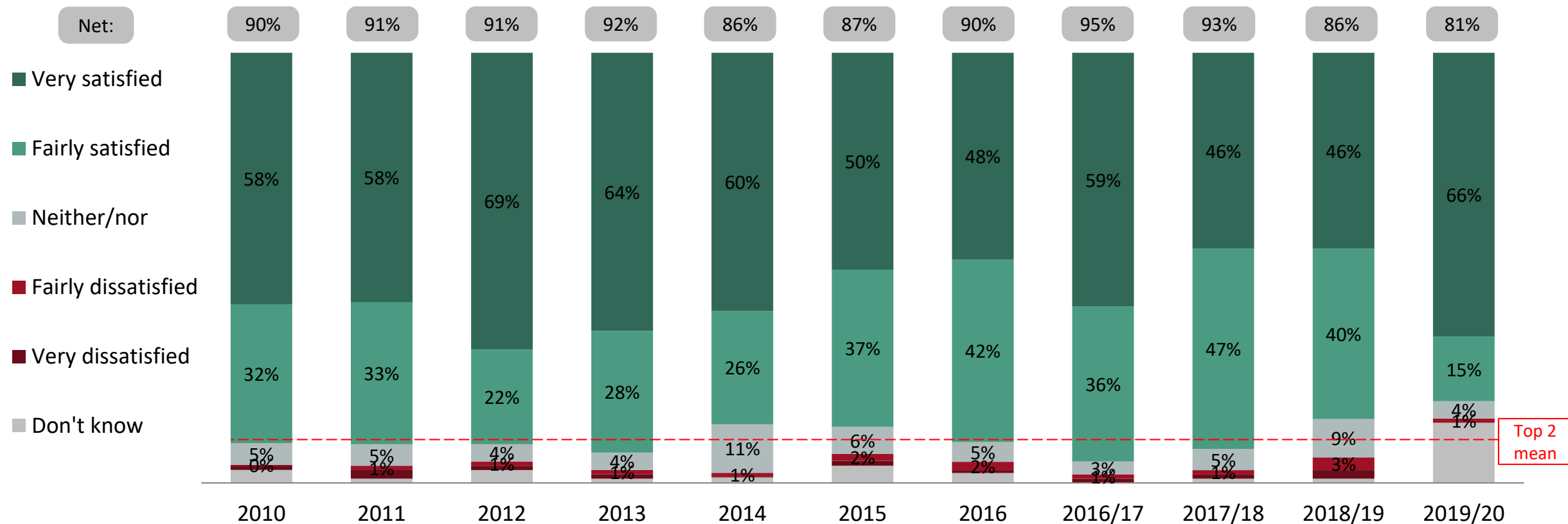
- In Bournemouth: 39%
- In Bristol: 47%
- In Wessex / Wessex: 36%



Satisfaction with billing

A key driver of VFM – satisfaction with billing has fallen slightly again this year after very high levels from 2016-18. The decline is because of ambivalence and uncertainty rather than active dissatisfaction – and coincides with fewer being able to give an estimate of their bill size.

Q14 (Q14a) Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months?
Base: All



NB: question wording altered in 2016
 2010-2015: Overall how satisfied are you with the way Wessex Water handles your billing?
 2016: Thinking now about your billing, how satisfied are you with the way Wessex Water has handled your billing over the last 12 months?

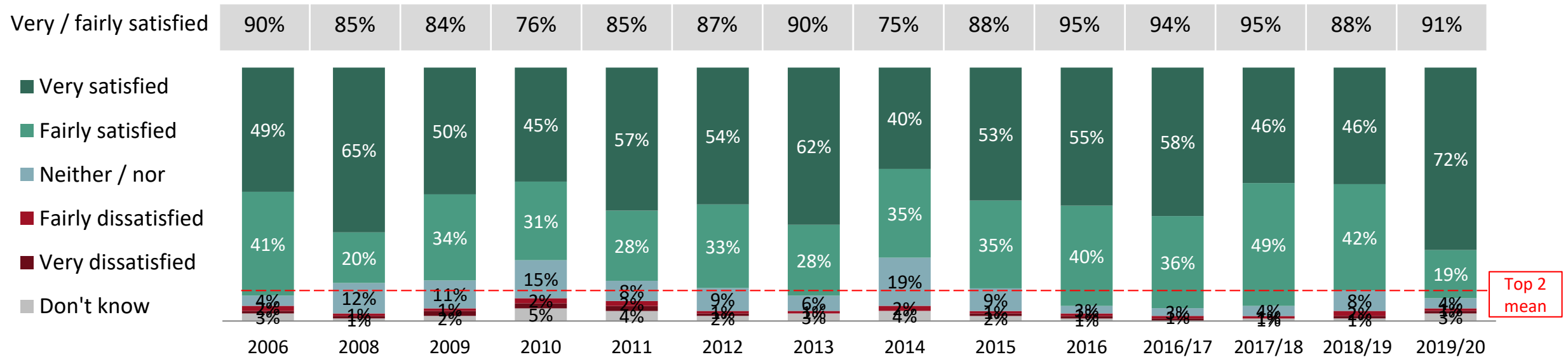


Satisfaction and Net Promoter

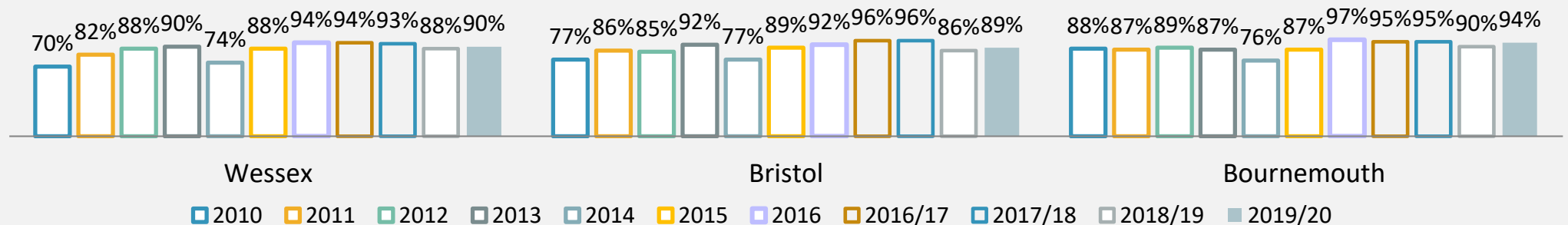
Overall satisfaction

Overall satisfaction has improved since last year, now back over 90%. It remains strong for all three regions. There's not much headroom for improvement, with a high proportion saying 'very satisfied', and only 2% actively dissatisfied.

Q15 (Q8) How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?
(Base: All)



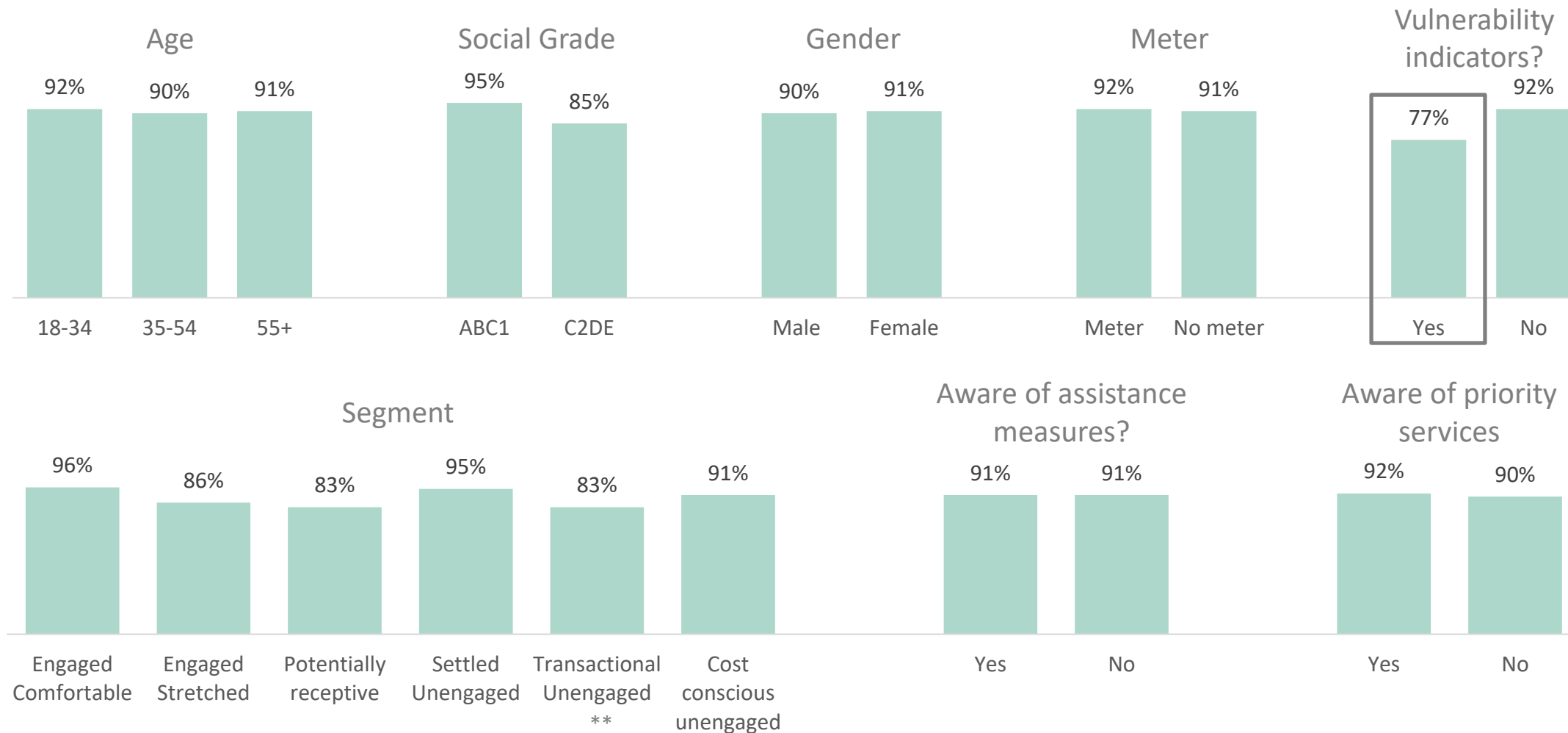
Very / fairly satisfied



Overall satisfaction by key groups

Satisfaction is broadly strong amongst all key groups, although those displaying indicators of vulnerability are less satisfied - indicatively the key issues amongst this group are price and issues with water leaks / wastage.

Q15 How satisfied are you with the overall service you have received from Wessex Water over the last 12 months?
% Very satisfied or fairly satisfied (Base: All 2019-20)

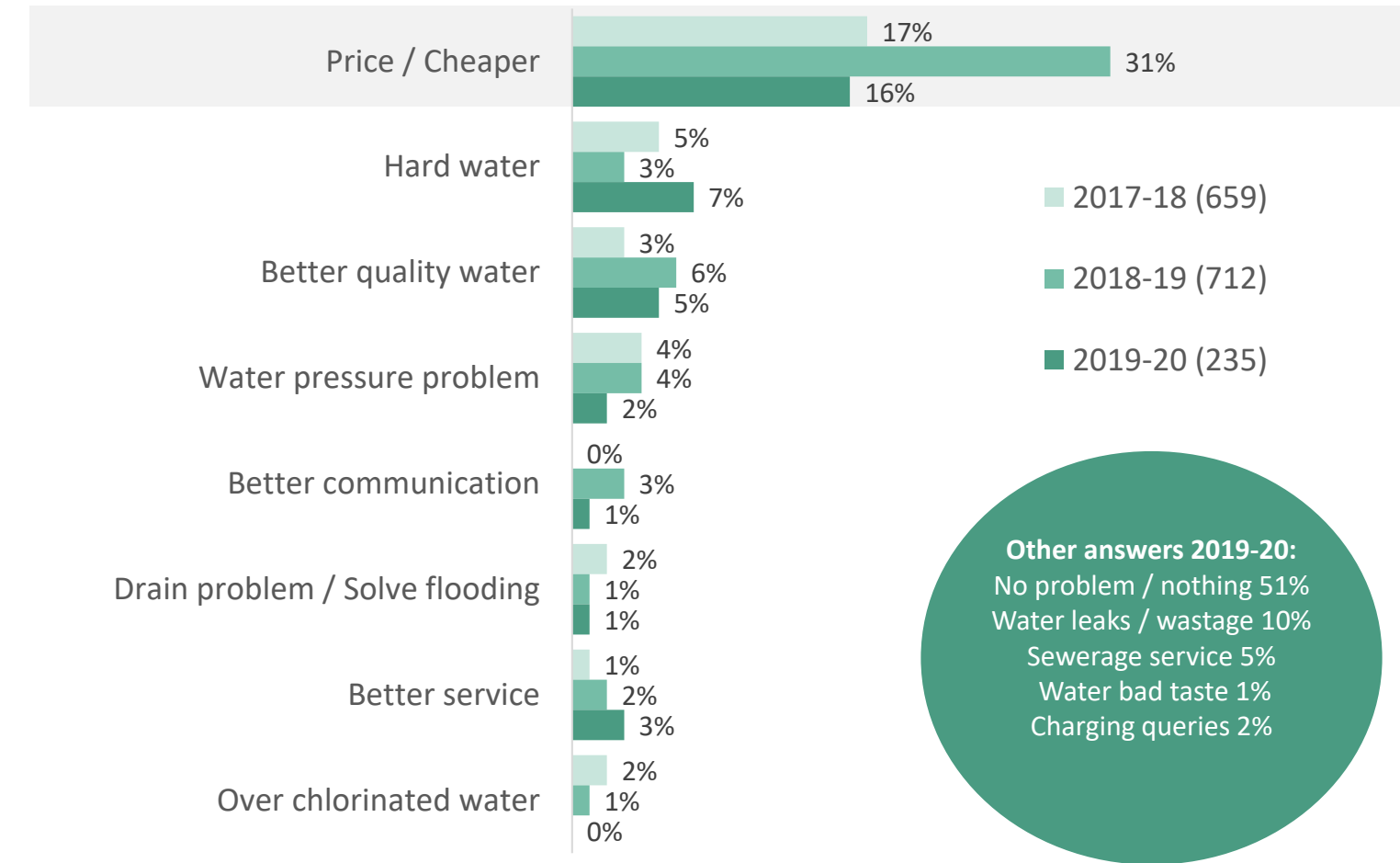


** CAUTION Low sample sizes (<80) – indicative only

Improving satisfaction

Even when focusing on satisfaction, the most top-of-mind issue to improve is bills; price is a more prevalent topic than any specific issue around water supply or quality.

Q16 Can you say in your own words what would increase your satisfaction in any of these areas?
Base: All not very satisfied with at least one element



Not had any dealings with them, don't really think about them they just provide an essential service

Not really, make our bills cheaper that's all

We get some funny smells coming up through our drains quite a lot, they seem to take ages to go away

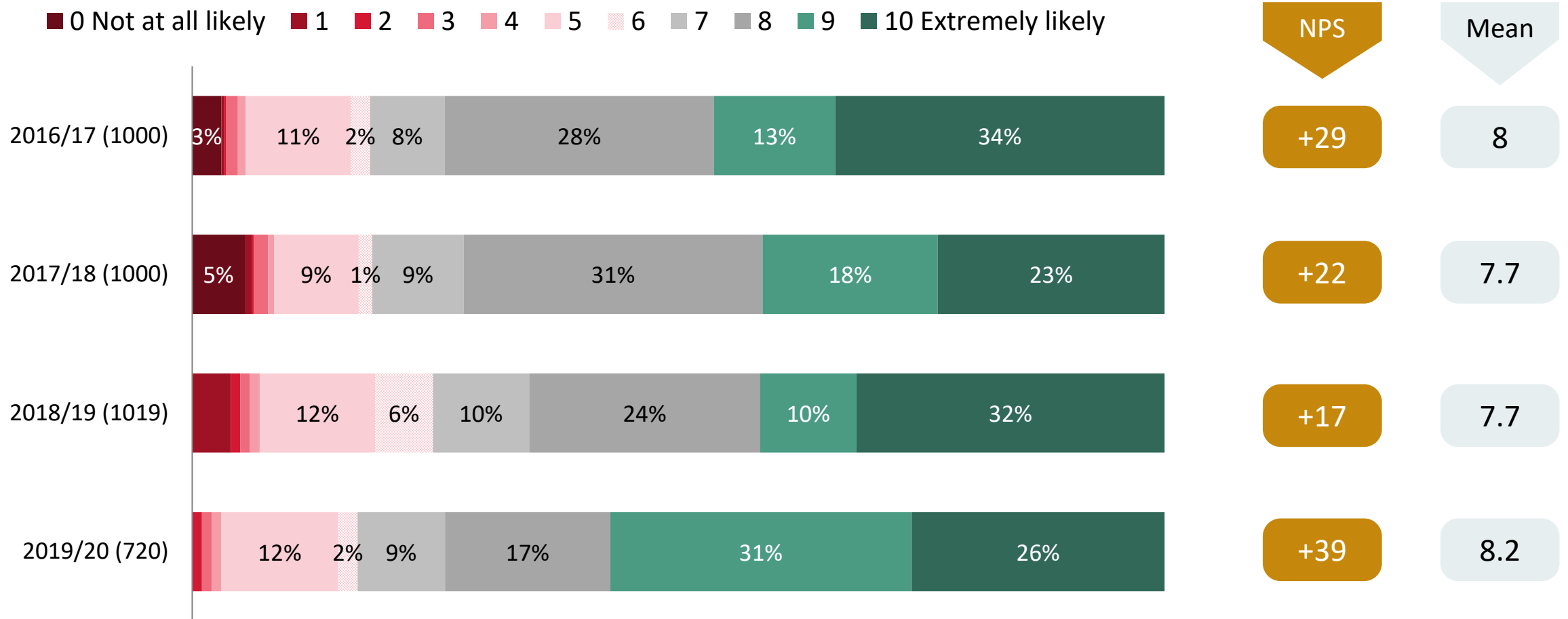
Proper service to deal with incorrect bills

Had very low water pressure since they did major works on the main road, have reported it several times but its still not fixed so rather unhappy with the situation

Net Promoter Score (NPS)

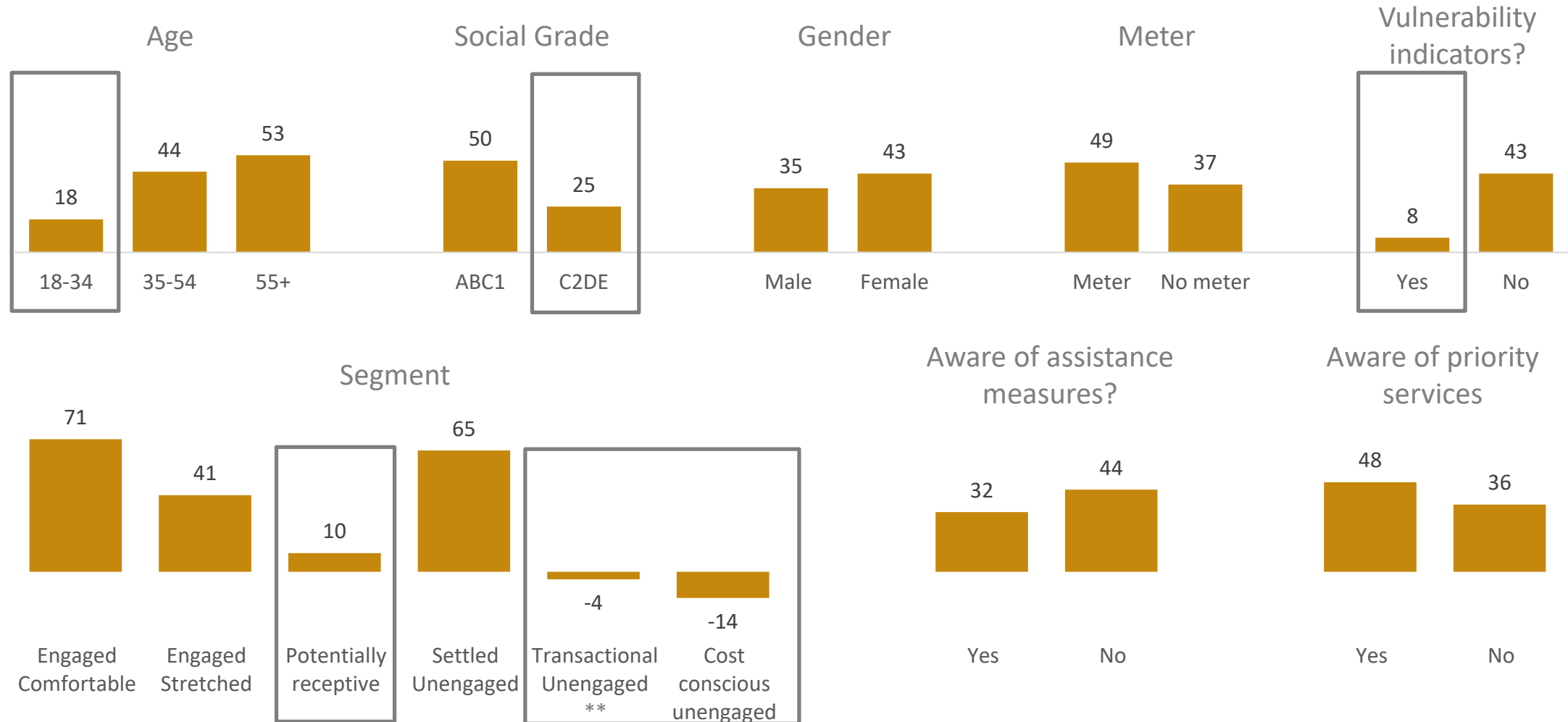
Across 2019-20, the NPS is strong – more positive than the last two years. Interpretation of this measure needs to take into account of its volatility, as it employs a +/- 100% scale.

Q33 If you were able to choose your water and sewerage provider, how likely would you be to recommend Wessex Water to a friend or colleague? (Base: All)



'Transactional unengaged' and 'Cost conscious unengaged' have negative NPS – they are priorities for targeting brand activity. Also scope to improve NPS amongst 'Potentially receptive', vulnerable, less affluent and younger customers.

Q33 Net Promoter Score
(Base: All 2019-20)



Reasons for recommendation score

Even 'promoters' often give a good score simply because they have had no problems – although we note a growing minority mention the environment. Amongst detractors, most simply don't have grounds for 'recommending'. A key task is to fill the 'image void' – giving consumers a relevant impression of the Wessex brand that would compel active positivity.

Q34 Why do you say that? *Top answers for each group* (Base: All)



Promoters (437)

Happy with service / satisfied – 34%

Good (quality) / clean water – 34%

Had no problems – 31%

Reliable / efficient – 19%

Good / very satisfied – 11%

Environment – 10%

Good value – 7%

Passives (176)

Happy with service / satisfied – 28%

Had no problems – 25%

Reliable / efficient – 20%

Good (quality) / clean water – 18%

Price issue / expensive – 10%

Good / very satisfied – 9%

Can't compare / only option – 8%

Detractors (107)



Can't compare / only option – 26%

Don't know (enough) – 25%

Price issue / expensive – 16%

Don't give recommendations – 14%

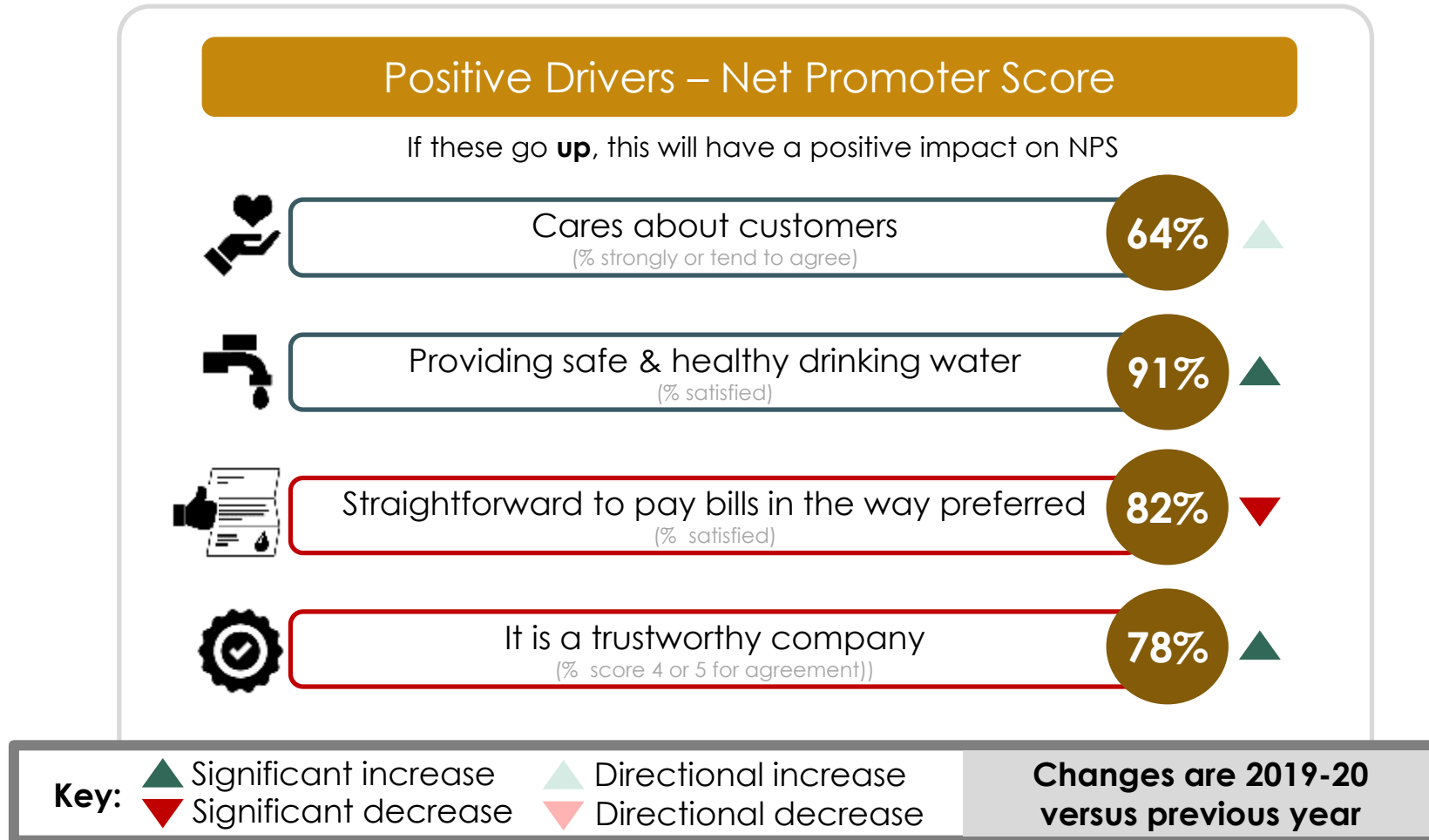
No real opinion – 13%

Slow to respond / inefficient – 11%

Had a problem – 7%

Underlying Key Drivers of Net Promoter Score

Beyond stated, 'top of mind' issues, we have identified some underlying drivers that have a degree of influence on the NPS (aside from VFM and satisfaction). If these drivers can be improved, we should see some positive response from the NPS. 'Cares about', 'safe and healthy' and 'trustworthy' all move in the right direction over the last year – although these alone are unlikely to account for all of the NPS improvement we have seen.

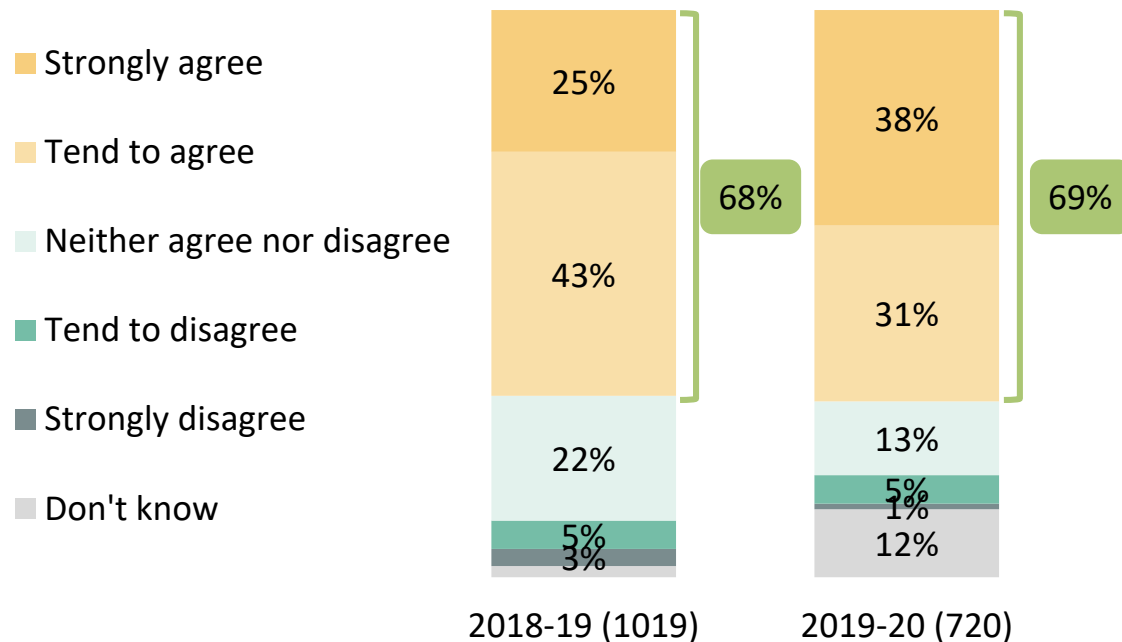




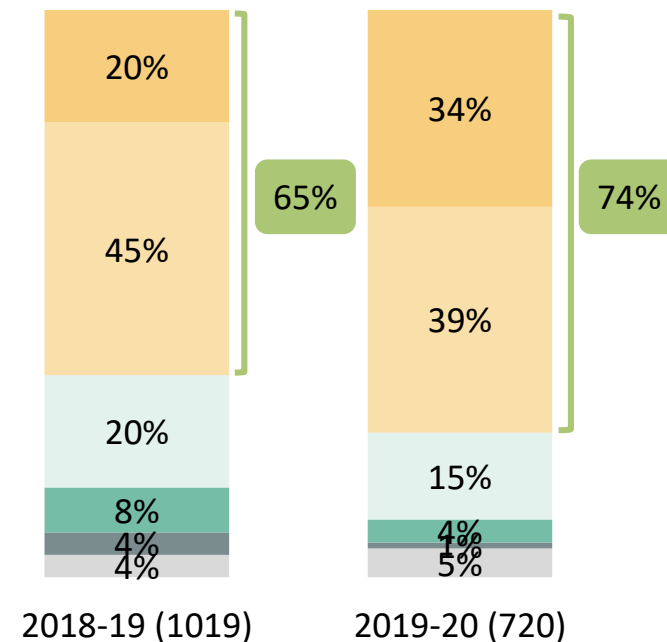
Affordability

Claimed affordability is very similar to last year: Just under 7 in 10 customers say total charges are affordable, 1 in 4 are ambivalent or don't know, and just 6% tell us they **do not** find their bill affordable. Nearly three quarters of customers find the total charges acceptable – up from 65% last year; could this be reflecting efforts to assist customers?

Q19b The total water and sewerage charges are AFFORDABLE



Q23b The total water and sewerage charges are ACCEPTABLE

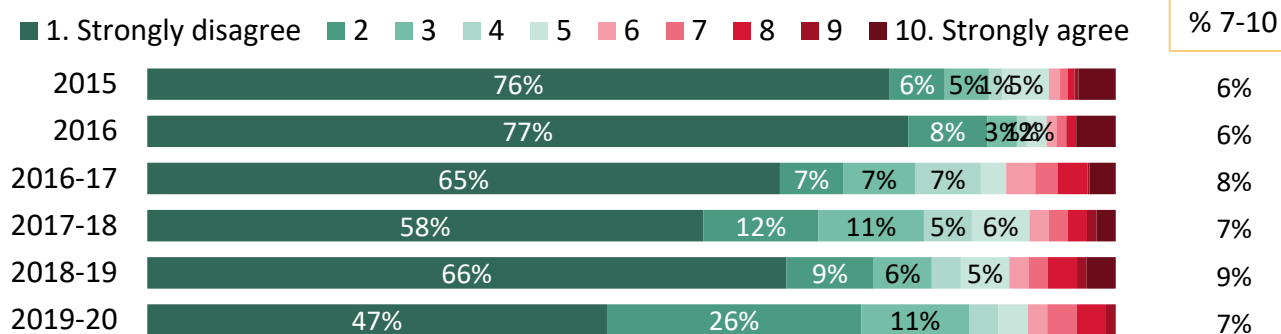


Most likely to disagree ('19-'20):
 Vulnerable 13%
 'Engaged stretched' 12%
 C2DE 10%

Affordability attitudes

There are signs of less anxiety about affording the water bill this year, alongside greater engagement with the water bill. This may be related to Wessex Water's plans to extend affordability measures.

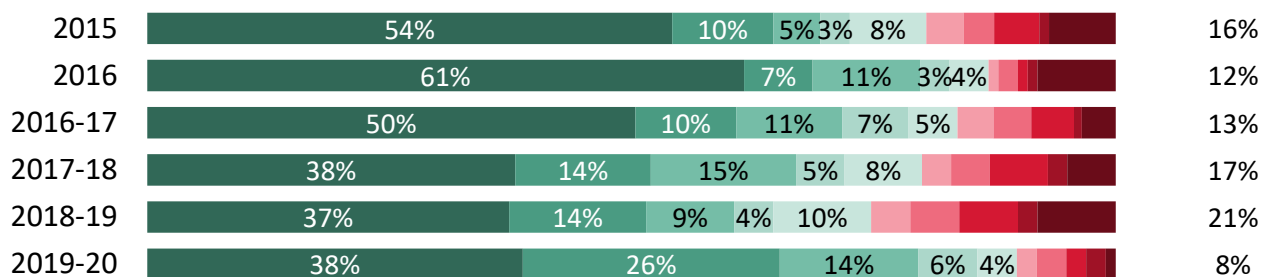
Q19(18b) How strongly do you agree or disagree? (Base: All who receive bill in HH)



Can't afford my water bill

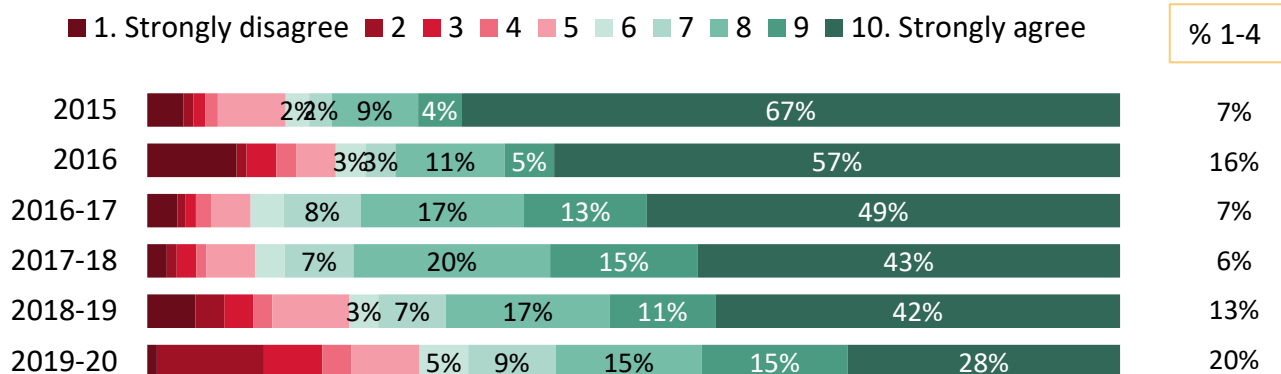
7%
Agree

I worry about affording my water bill



8%
Agree (significant decrease)

I don't really think about my water bill

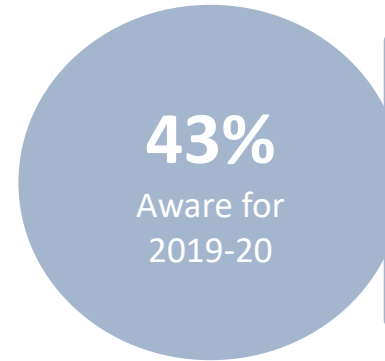
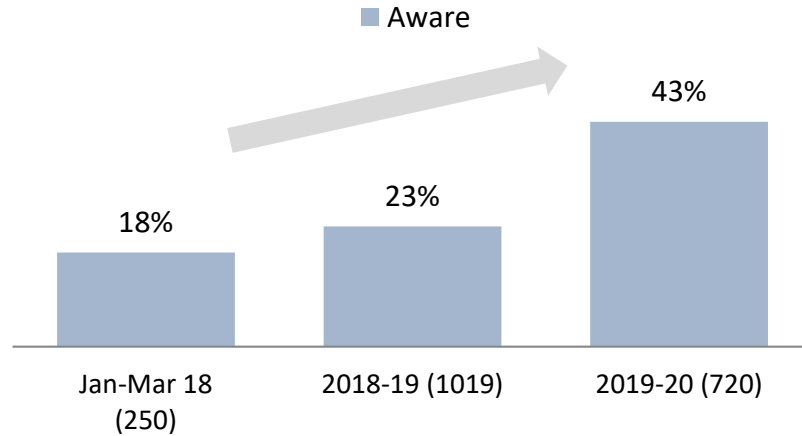


20%
Disagree (significant increase)

Awareness of Assistance Measures

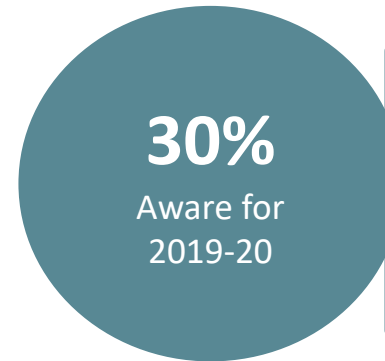
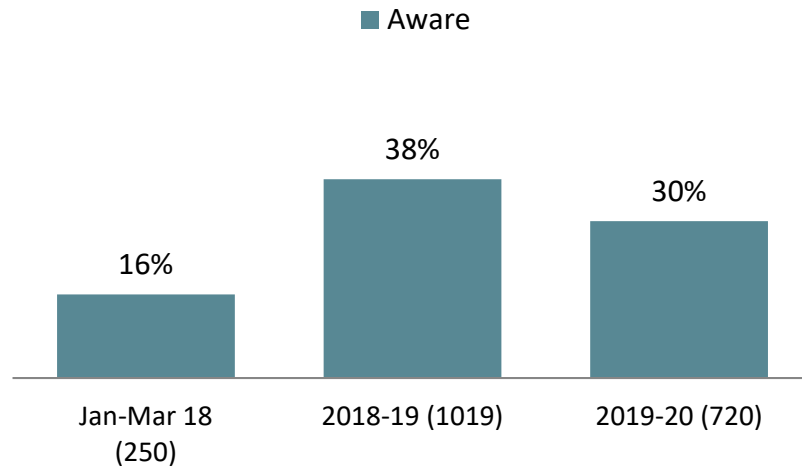
Awareness of **financial** assistance measures has improved notably from last year - coinciding with a reduction in bill anxiety. Messages about financial assistance seem to be reaching the right people – although still scope to reach more.

QF10 Are you aware of any kind of assistance that Wessex Water offers for customers **who struggle to afford their water bill?**
(Base: all respondents)



Higher amongst:
Vulnerable (63%)
 Engaged stretched (52%)
 Cost-sensitive unengaged (52%)
 Those aware of Wessex magazine (52%)

QF12 Are you aware of any additional services offered by Wessex Water? These are also known as **Priority Services?** *(Base: all respondents)*



Higher amongst:
Vulnerable (44%)
 Those with a meter (39%)
 Those aware of Wessex magazine (38%)
 55+ years old (38%)



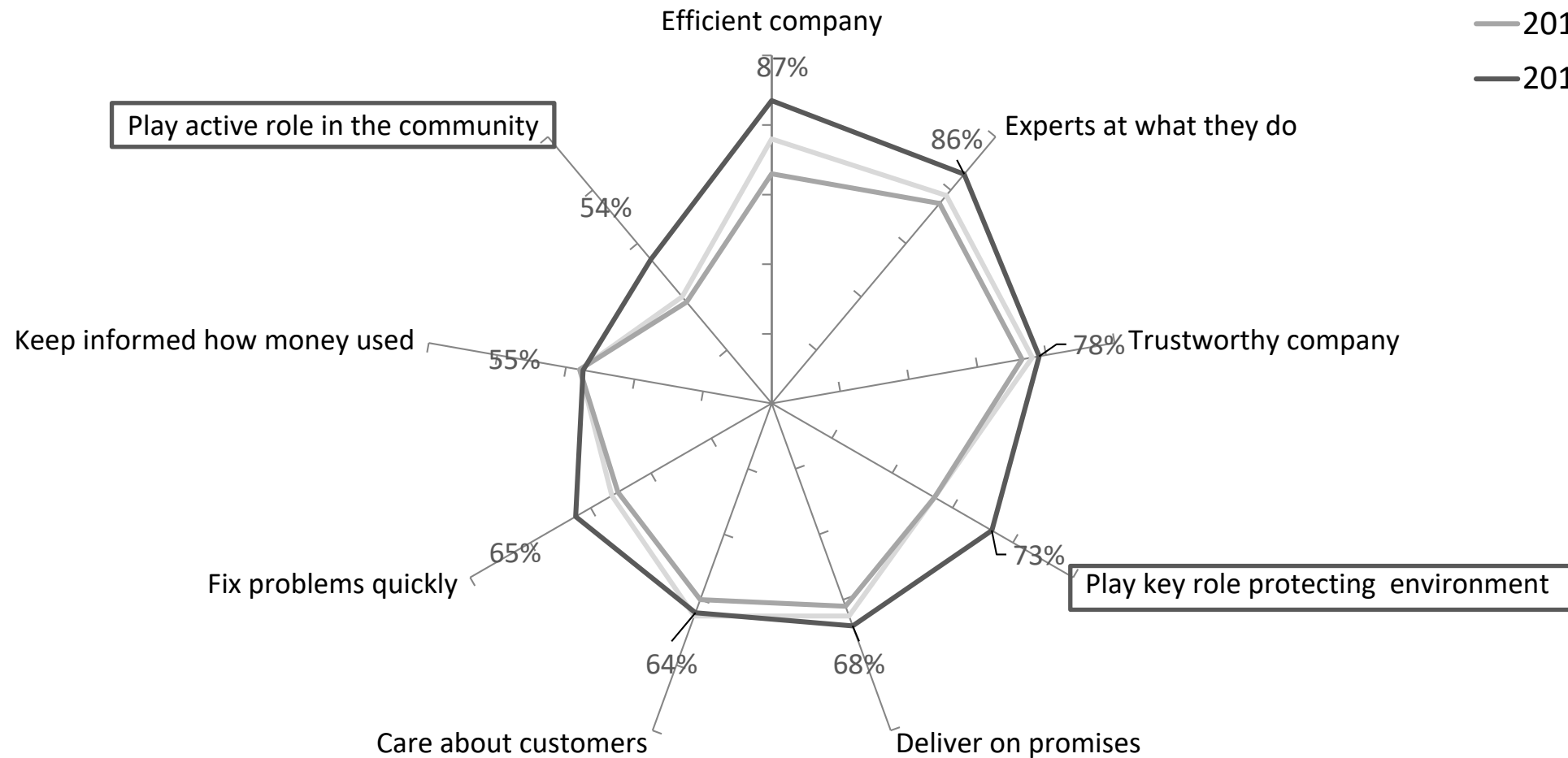
Image and Communication

Brand imagery

'Efficiency' and 'Expert' are consistently most widely associated with Wessex Water. In 2019-20 there's generally stronger endorsement of Wessex Water's image - in particular what Wessex Water does for the environment and communities. These improvements may be a response to recent initiatives and communications.

Q17. How much would you agree with the following statements?
% Agree strongly or tend to agree (Base: All)

— 2017/18 (1000)
— 2018/19 (1019)
— 2019/20 (720)





Water efficiency / community



Water efficiency



Cold weather



A

M

J

J

A

S

O

N

D

J

F

M



Plastic / wet wipes – what not to flush



Cold weather, pollution, wet wipes

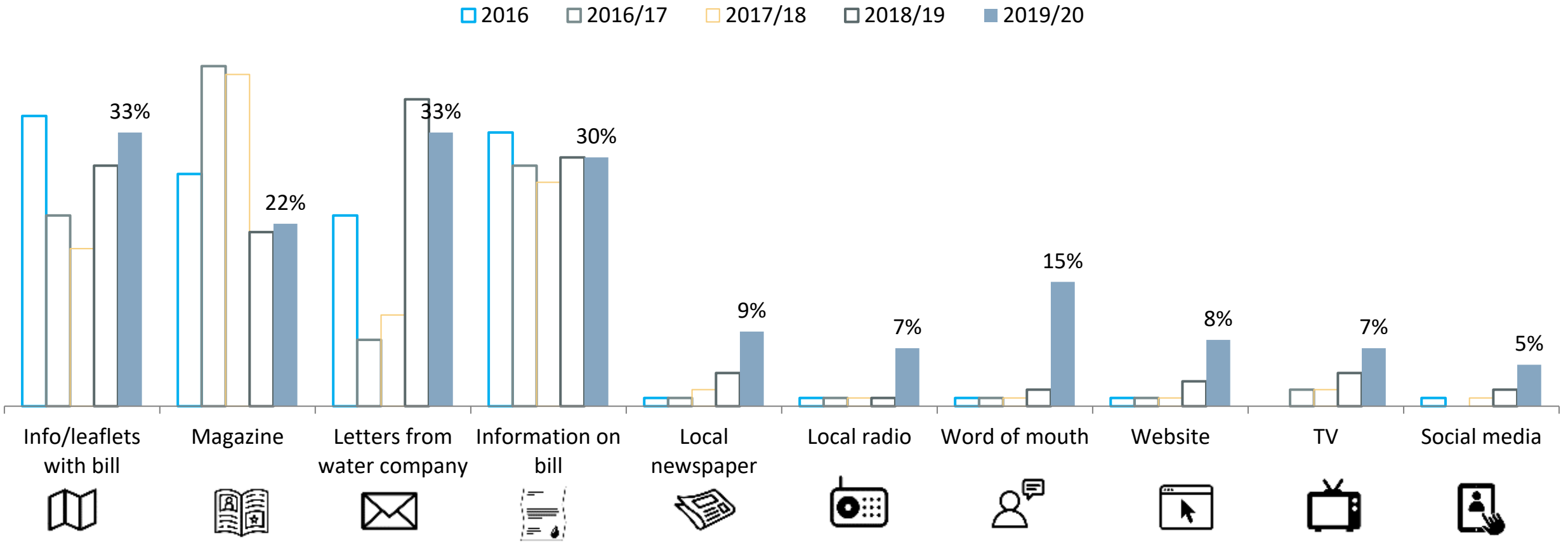


Ongoing social media

Recall of recent communications - channel

- **Spontaneous** recall of receiving letters has risen this year, while the magazine is less top of mind
- While still relatively low recall, there is more mention of Wessex communication via local papers, radio, the website, TV and social media in the last year – and particularly word of mouth.

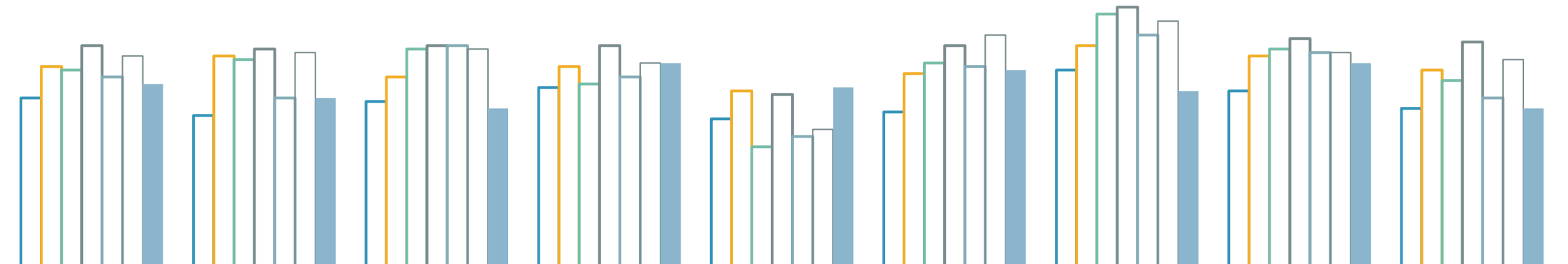
Q24(19) Please can you tell me all the different ways that you have received information from your water company or heard about your water company in the last year? (Base: All)



Prompted magazine recall

On **prompting**, magazine recall this year cannot quite match last year, but remains more than half of customers. It has good reach amongst most groups of customers; more evenly recalled amongst different age groups this year, but lower amongst C2DE customers. Relevance of headline content is likely to be an important influence on recall.

Q27. Wessex Water publishes a magazine. Do you recall receiving this in the last year? (Base: All)



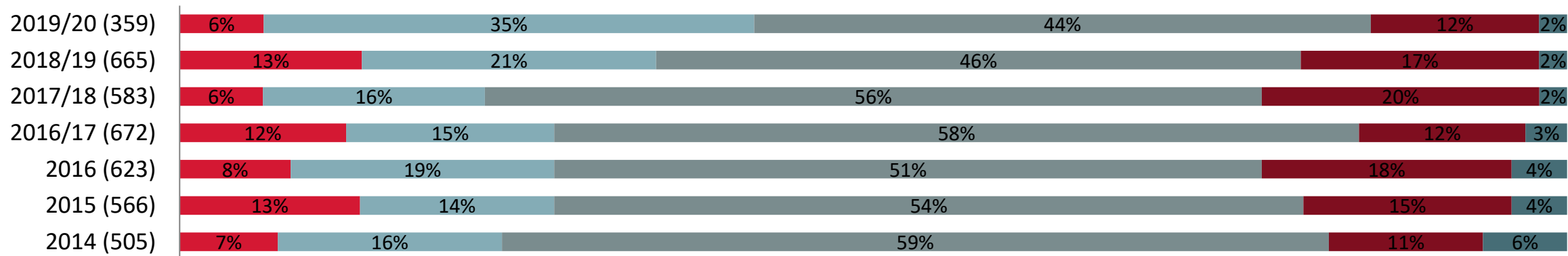
	Total	B/mouth	Bristol	Wessex	16-34yrs	35-54 yrs	55+ yrs	ABC1	C2DE
2014	48%	43%	47%	51%	42%	44%	56%	50%	45%
2015	57%	60%	54%	57%	50%	55%	63%	60%	56%
2016	56%	59%	62%	52%	34%	58%	72%	62%	53%
2016/17	63%	62%	63%	63%	49%	63%	74%	65%	64%
2017/18	54%	48%	63%	54%	37%	57%	66%	61%	48%
2018/19	60%	61%	62%	58%	39%	66%	70%	61%	59%
2019/20	52%	48%	45%	58%	51%	56%	50%	58%	45%

Quality of magazine readership picks up again this year, with over four in ten of those who recall the magazine telling us they read 'all or most'. The magazine remains an opportunity to get important communications noticed. Content is also rated useful by two thirds of those aware in the latest year – one of the highest scores to date.

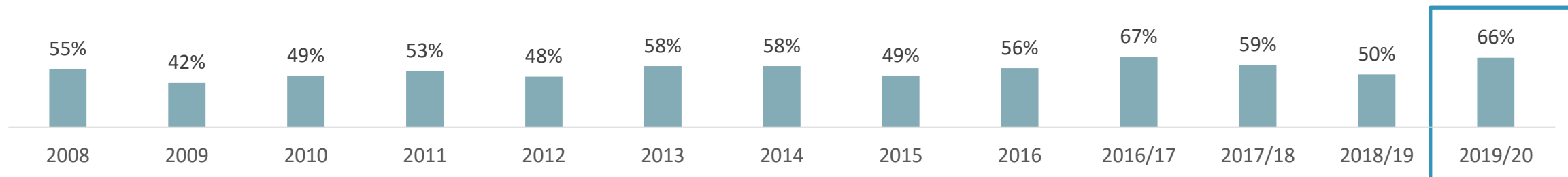


Q28 (26) How much did you read of Wessex Water magazine? (Base: those who recalled receiving WW magazine)

■ All of it
 ■ Most of it
 ■ Just flicked through it
 ■ Did not read any of it
 ■ Don't know



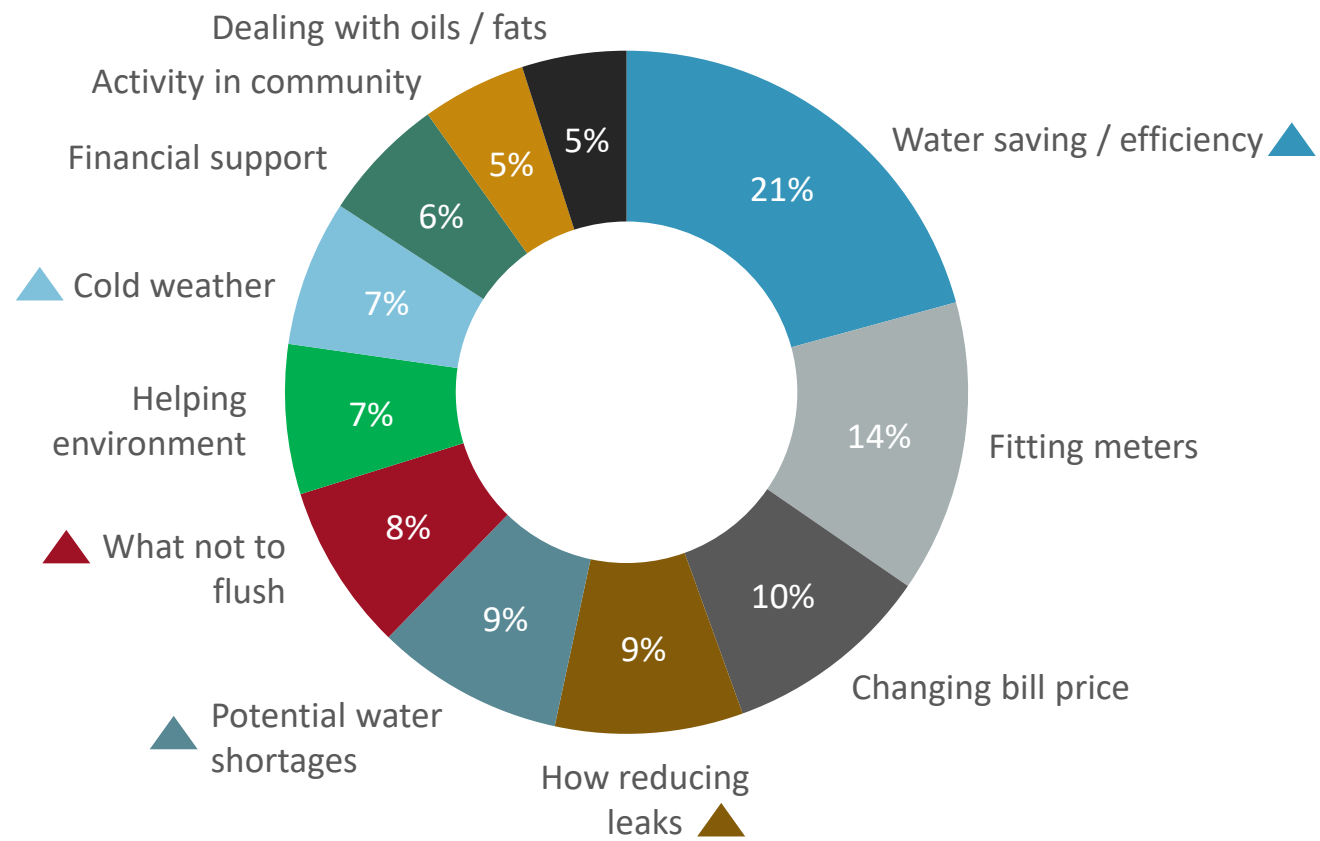
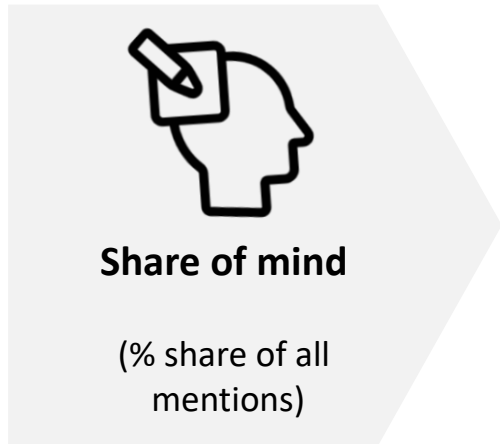
Q29 (27) Overall how useful did you find Wessex Water magazine? % very or quite useful (Base: recalled receiving WW magazine, 359)



Recall of messages / information about Wessex Water

The combination of magazine and radio activity with a focus on **water saving and efficiency** appears to have cut through more than other messages. 'What not to flush' also grows in share of mind (coinciding with the 'War On Plastic' BBC TV series featuring Wessex Water), as does cold weather messages (carried both on the radio and in the magazine).

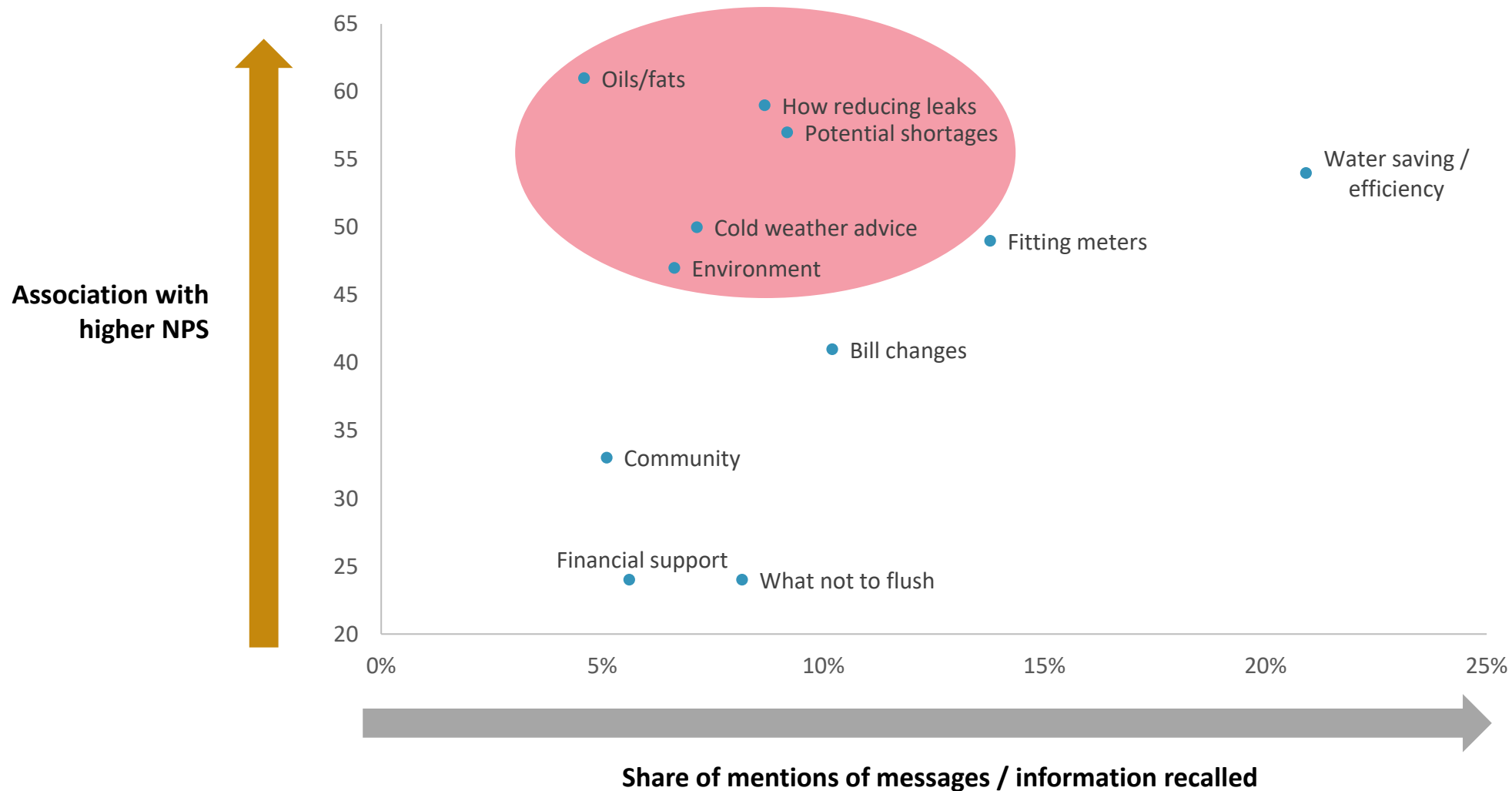
Q25. And what did you hear about Wessex Water or what was the subject of that information? Base: All 2019-20 who mention anything



Key: ▲ Increase since last year

Messages / information – association with NPS

Awareness of certain messages / information correlates with higher NPS. Focusing on widely relevant, practical and positive advice (oil and fat; cold weather advice; potential shortages) plus broader messages on reducing leaks and environmental action may potential to boost NPS.

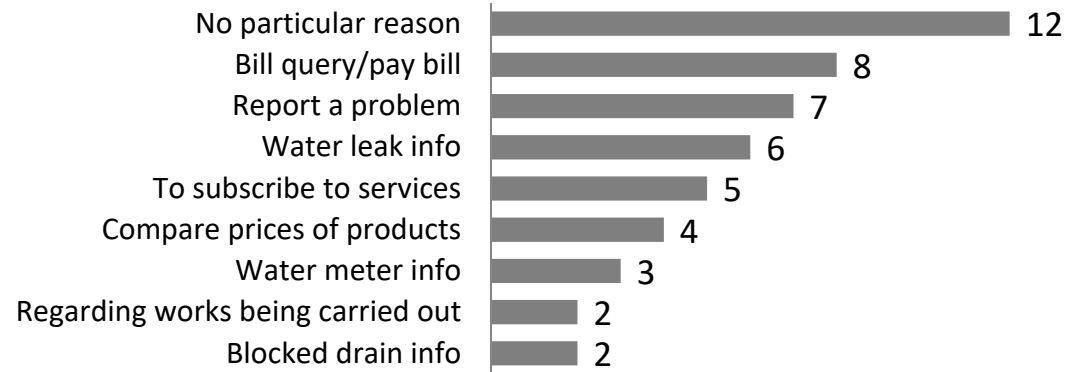




6% have visited the website*
(9% in 2018/19)

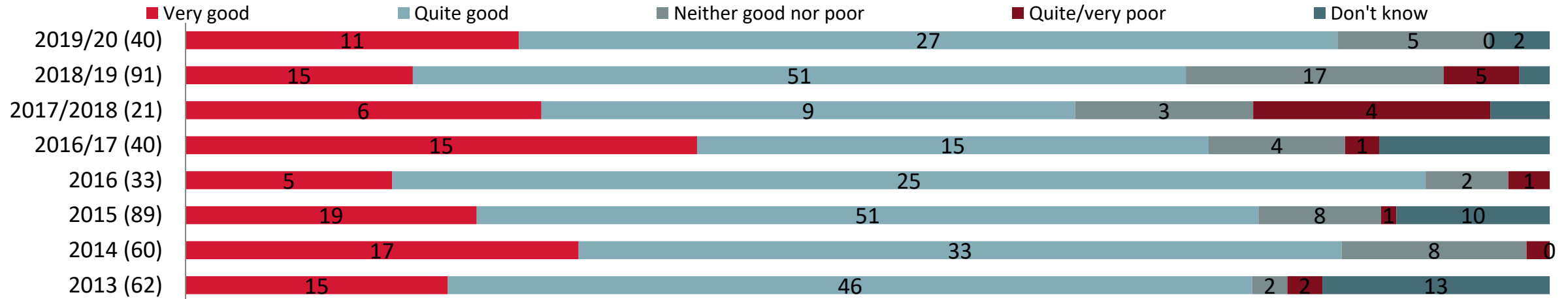


Q31 Why did you visit the Wessex Water website? (Base: all who visited website, 40). Actual numbers



Only around 1 in 20 customers recall using the website recently. Of those using it, there is a mix of motivations. Website experience is broadly good – although there is opportunity to ‘delight’

Q31 Overall how would you rate Wessex Water’s website? (Base: all who visited website, 40). Actual numbers



*NB: question wording altered in 2018/19 Previously: Wessex Water has recently updated its website, have you visited Wessex Water's website in the last 6 months?
2018/19: Q30. Have you visited Wessex Water’s website in the last 6 months?

Ease of access - Wessex

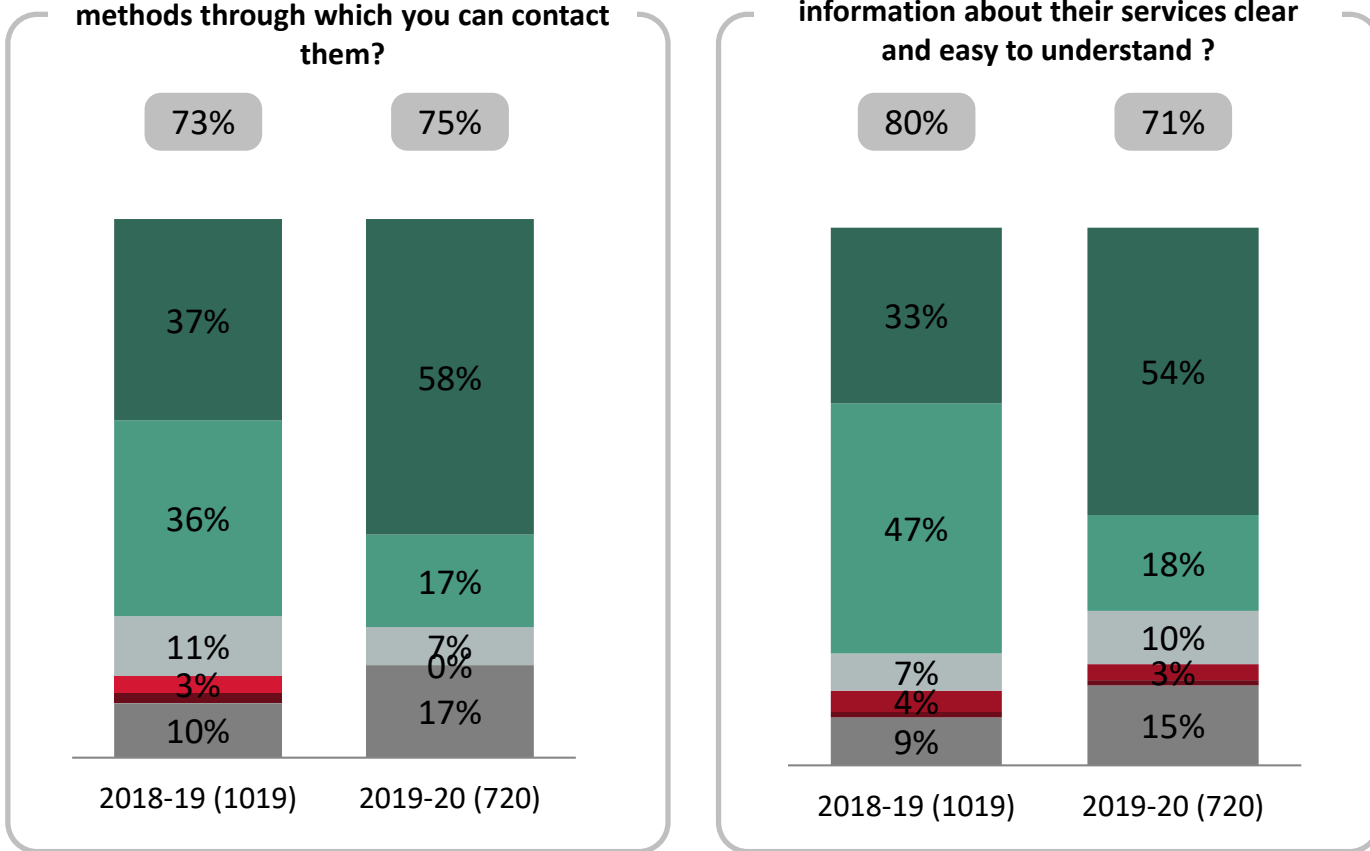
Most customers are broadly happy with accessibility, although nearly 2 in 10 now say they 'don't know' about the methods of contacting Wessex. Many will have had limited need to do so, but with few using the website, is there scope to promote and embed digital options more?

Q17C_4. How would you rate Wessex Water's performance in - The range of methods through which you can contact them?

Q17C_5. How would you rate Wessex Water's performance on - They make information about their services clear and easy to understand ?

Very / fairly satisfied:

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



Ease of access combined metric:

73%

(The sum of agreement with both statements divided by 2)

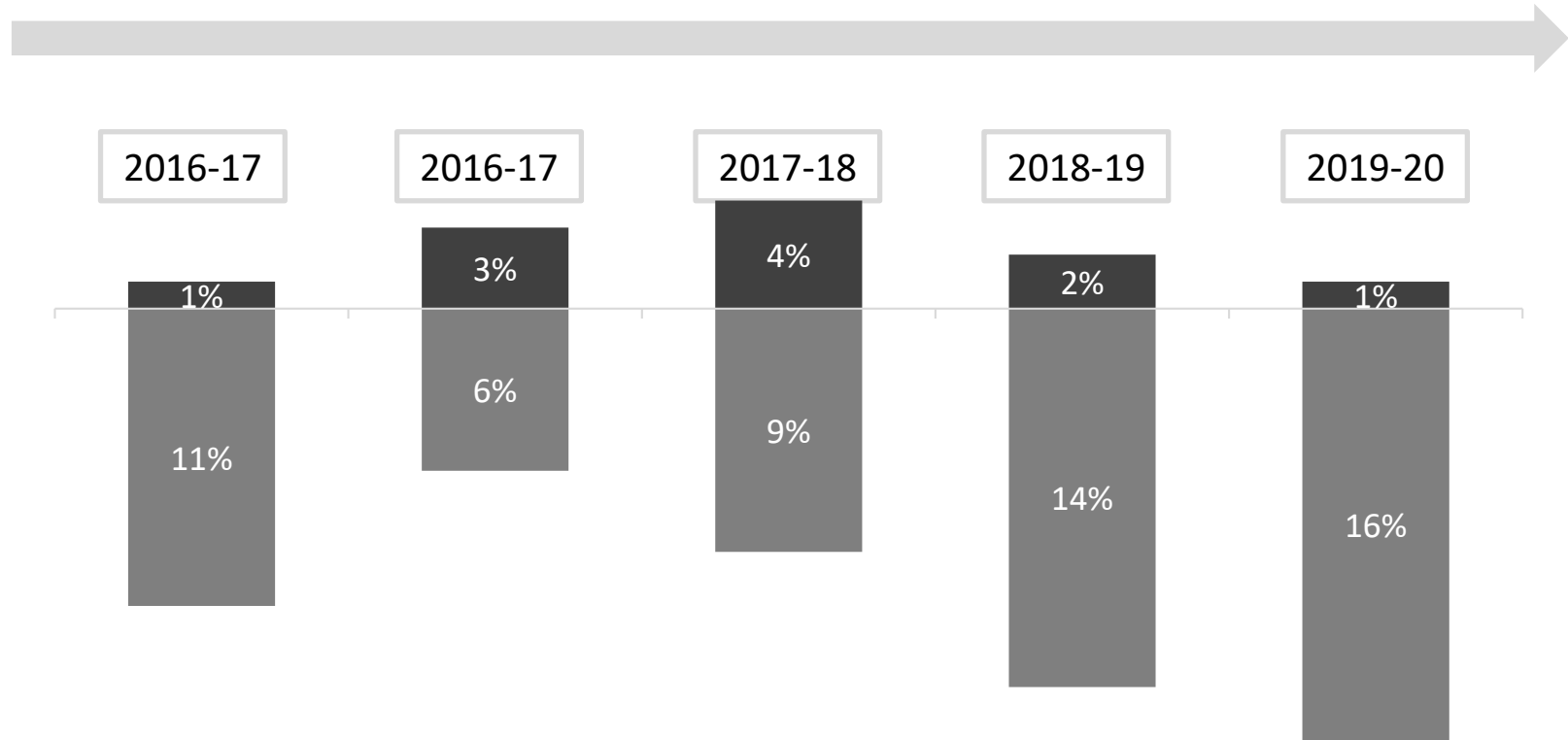
Directionally down from last year (76%)

Base: All respondents

Meeting information needs?

The balance of opinion remains that Wessex provides 'too little' info – customers would accept more communication.

Q26 (24) Overall do you think Wessex Water provide their customers with too little, too much or about the right amount of information? (Base: All)



■ Too much

■ Too little

In particular those who think 'too little':
Engaged Stretched & Potentially Receptive segments; those 'less than satisfied'



Moving forward

Key findings

Implications

Value for money & Bills

- Some VFM improvement in 2019-20
- ...scope to improve further (but post COVID19 parameters may shift dramatically)
- Low prices remain the key top-of-mind factor
- Fewer customers able to estimate their bill size, but those who can are now slightly better informed

- A need to fill the bill knowledge 'hole' – about the current amount and future trajectory of bills
- In addition, informing customers 'where money goes' and bolstering 'care' perceptions can assist VFM further
- Focus on younger customers and 'Cost-conscious unengaged' with new modes of engagement
- Bill discount / relief (in particular for vulnerable) may be increasingly pertinent as COVID19 impacts finances

Satisfaction

- Overall satisfaction has directionally improved - strong for all three regions
- Little headroom for improvement
- Bill price is a top of mind factor to improve satisfaction, but other factors also contribute

- As the nation approaches challenging times, (in May half of the public are feeling 'more stressed') there's a heightened need to ensure the basics are done well
- During lockdown, reliable and responsive service provision will be crucial – and in particular for an expanded set of 'vulnerable' customers
- Some evidence that, so far, water companies have not succeeded in actively making a positive impact since the coronavirus outbreak – need to investigate and address
- Communication and updates will be important during times of heightened anxiety (...and we know customers feel Wessex Water can be too 'quiet').

Key findings



Implications



Net Promoter Score

- Stronger NPS recorded this year
 - Although it varies substantially by different customer groups - 'Transactional unengaged' and 'Cost conscious unengaged' segments see a negative score
 - The positive shift in NPS coincides with notable gains in two aspects of brand image: Environment and community participation
 - Signs that environmentally-related action is growing as a top of mind reason for advocating Wessex Water
 - ...and awareness of environmental comms, as well as comms about relevant, practical & positive advice, can correlate with higher NPS
- Consumers need front-of-mind associations about Wessex Water to feel that they would 'recommend' it
 - The sentiment of 'recommendation' hinges on what differentiates the brand
 - Communication and association with **relevant** topical practical and emotive themes / action can capture popular imagination and help an evolving Wessex brand evoke positive sentiment
 - Specific audiences to target are the less engaged segments, along with younger, vulnerable and less affluent

Key findings

Implications

Affordability

- Signs of slightly less anxiety about affording bills (ahead of the coronavirus outbreak...)
- Meanwhile slightly higher claimed involvement with the water bill
- ...coinciding with Wessex Water's plans to extend affordability measures and increase in awareness of assistance

- Apparent success in communicating roll out of financial assistance measures – particularly to key groups (vulnerable, engaged stretched, and even cost-sensitive unengaged)
- ...awareness is not yet universal so there's a need to continue – and the audience for whom this is relevant may well expand over coming months

Image and comms

- Improving associations with 'active in community' and 'protecting environment'
- ...whilst maintaining 'efficient' and 'expert' as core foundations of brand
- More mention of a wider range of comms recalled this year (including word of mouth)
- The magazine falls slightly for prompted recall, but is enduring in quality of readership and perceived as highly useful

- There is licence to communicate more
- Indirect signs that the latest media strategy is beginning to be recalled in different contexts
- Important to consider how to deploy individual channels to inform and support customers on practical matters, while also maximising the combined effect of disparate channels to support a single-minded brand identity for the wider *consumer* audience



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Appendix 1 – Additional Context



Measure domestic customer views in relation to service, value for money, affordability and satisfaction

Identify and monitor imagery of Wessex Water and attitudes towards it

Track awareness and use of Wessex Water communications

Understand how Wessex Water can improve perceptions amongst customers

Telephone interviews

The 2019-20 survey is the fourth year with continuous interviewing through the year

Random sample of domestic customers

All respondents responsible for paying water bill. Quotas consistent with previous years on region and age

Data weighted at analysis

Data is weighted to gender, age and area to ensure consistency with previous years. Weighting applied within each Quarter

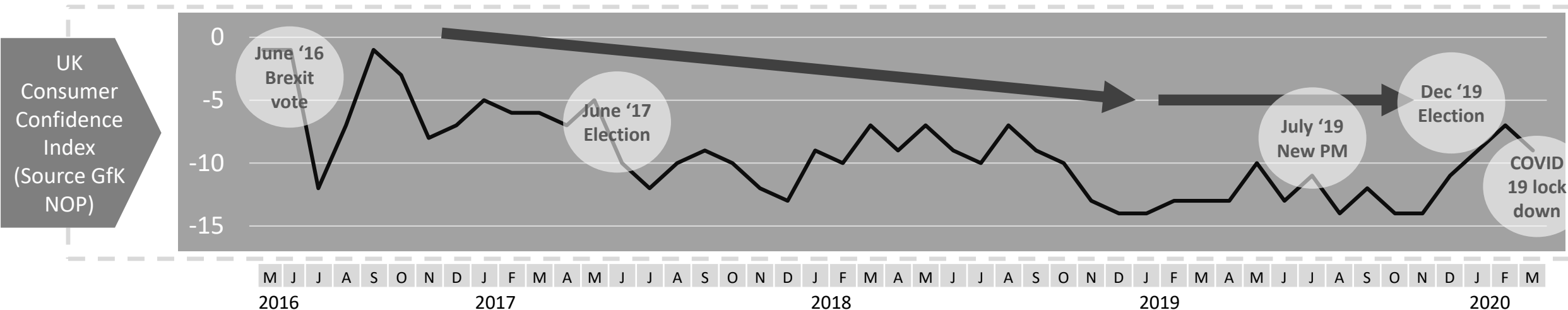
Fieldwork April 2019 to Dec 2019

Q1 interviewing Apr – June '19 (n=250)
Q2 interviewing July – Sept '19 (n=250)
Q3 interviewing Oct – Dec '19 (n=230)
Q4 interviewing not reported*

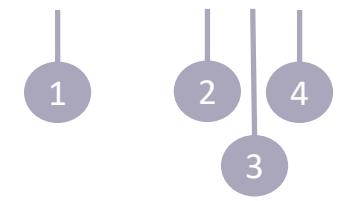
* Q4 data was not properly recorded due to fieldwork supplier system failure and cannot be reported

Context

Consumer confidence nationwide has been at relatively low levels through 2019. Signs of some improvement going into 2020 likely to be short-lived with the outbreak of COVID19.



- Key Wessex activity / industry news
- 1 Wessex Water water efficiency radio advertising
 - 2 First burst of Wessex Water cold weather radio advertising
 - 3 Ofwat **Final determinations**
 - 4 Second burst of Wessex Water cold weather radio advertising



Weather watch

- A relatively dry start to the year
- Summer was both hot and wet – record breaking temperatures in August
- November to February 2020 saw unusually wet weather – the country was hit by storms Brendan, Ciara and Dennis in quick succession in January-February 2020, with serious flooding in several parts of England and Wales

Wessex Water helping Bath Half go plastic free

27/01/2020

Wessex Water will supply fresh tap water to Bath Half Marathon runners - part of a mission to make the race totally free of single-use plastics by 2021.



MOST READ

- Reaching net carbon zero
- Three firms win favour in Wessex Water supply chain challenge
- Amey bags £100 million Yorkshire Water contract
- Filter manufacturer invests for growth

In a landmark new partnership called Refill Not Landfill, runners will be able to fill up their reusable bottles at Wessex Water's HydroZones, with tap water stations also available to supply water in compostable cups during the race.

Why Wessex Water bills are coming down

The company is investing a record £1.4 billion to further improve services for customers and protect the environment

Wessex Water pays for polluting Dorset nature reserve

Wessex Water has paid £35,000 towards environmental improvements at Stoborough Heath nature reserve in Dorset after a sewer main burst.

Wessex Water customers being invited to find out more about future plans

Wessex Water is inviting all of its customers in Bath along to a free event at Bath Racecourse in July to get an insight into the company's plans for the future.

Clean-up at Chesil Beach by Wessex Water volunteers



The Times view on pollution in Britain's rivers: Filthy Business

The Environment Agency needs to get tougher with water companies whose woeful record means no English river can be certified safe for swimming

Charity accuses water companies of treating rivers as open sewers

Viva Buisly, Science Correspondent
August 13 2019, 12:01pm, The Times

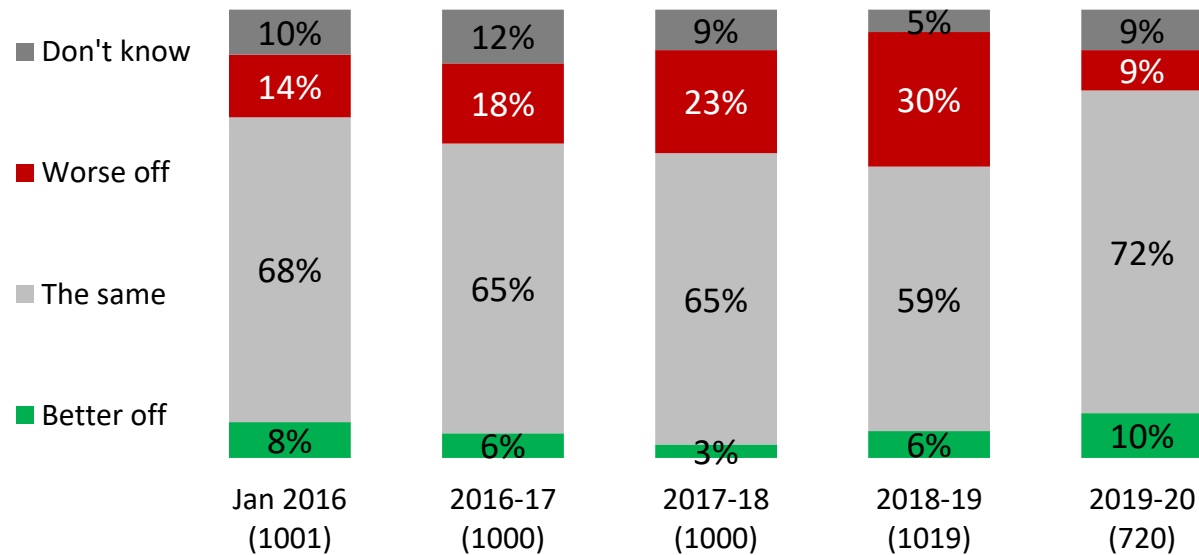


Swimmers in a polluted section can cause contamination of freshwater, which can be fatal

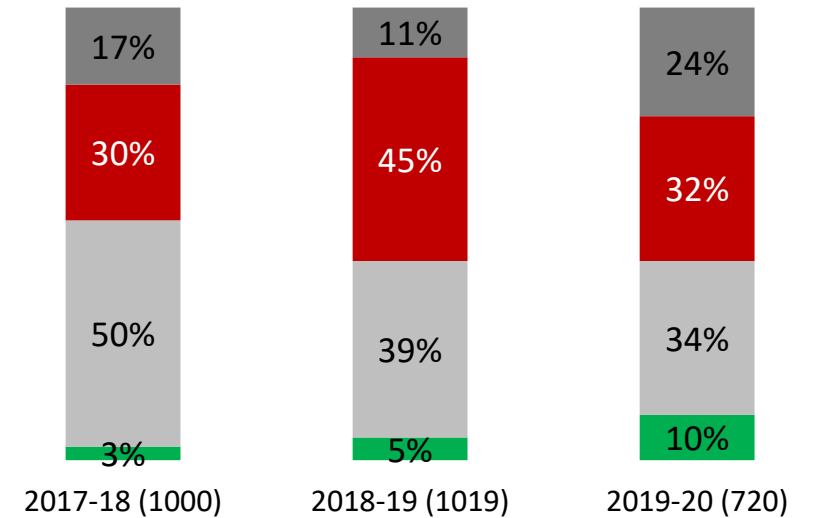
Financial Outlook

As the national picture for consumer confidence stabilises through 2019 (with some signs of improvement pre-COVID19), there is a feeling things will 'stay the same' rather than actively get worse for Wessex Water households. Growing uncertainty around the economic fate of the UK through a year dominated by Brexit uncertainty.

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



Q11b Thinking about the UK nationally, do you expect the economic climate to be better, worse or about the same in the next 12 months? (Base: All)

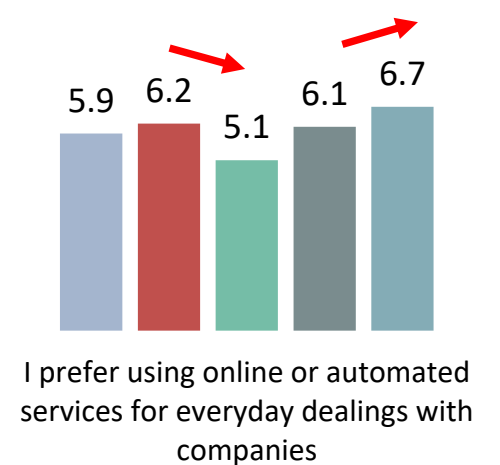
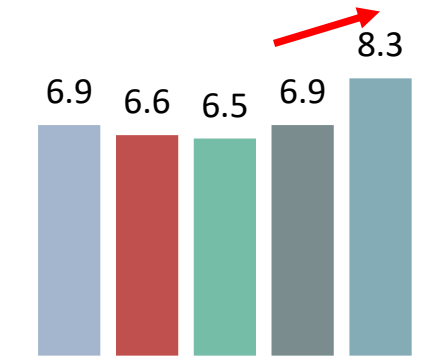
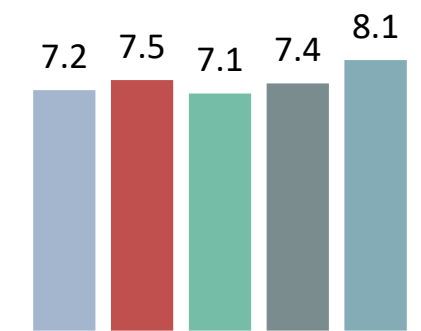
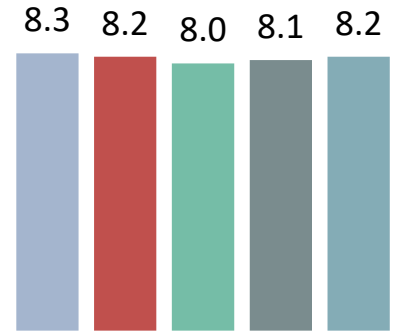
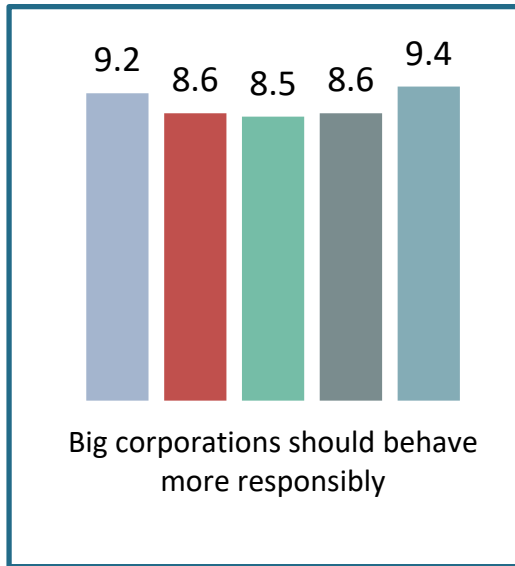


External Factors

- Wessex Water customers feel more strongly than ever that big companies should act responsibly; with the bedding in of YTL branding, Wessex need to be mindful of this
- Continuing rebound in preference in use of automated services – a sign that Wessex Water should place greater emphasis on developing online / digital facilities?

Q36 How strongly do you agree or disagree with the following statements? (Mean out of 10) Base: All

■ Jan-16 ■ 2016-17 ■ 2017-18 ■ 2018-19 ■ 2019-20



Personal Concerns

Concern about housing shortages, water shortages and greenbelt reduction have all reduced this year – as Brexit concerns saturate popular consciousness. Water shortages remain a less widespread worry than threats to greenbelt.

QF5C. To what extent, if at all, does ... concern you personally ? (Base: All)

Mean

■ Does not concern me (1-5) ■ Concerns me (6-10) ■ Don't know

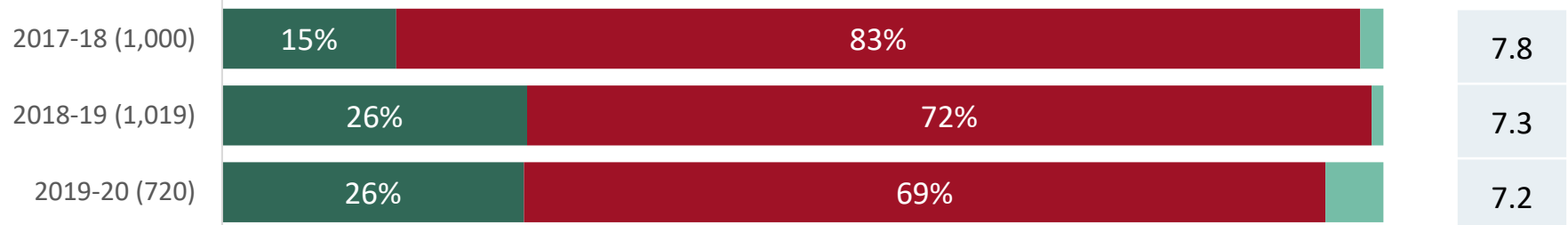
Housing shortages



Water shortages



Reduction of greenbelt



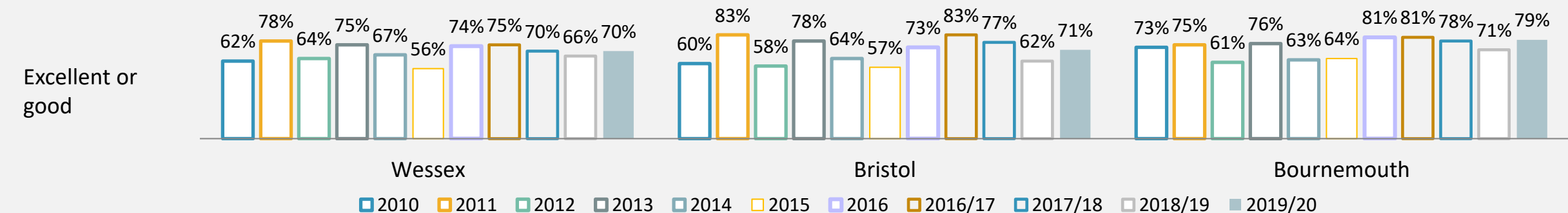
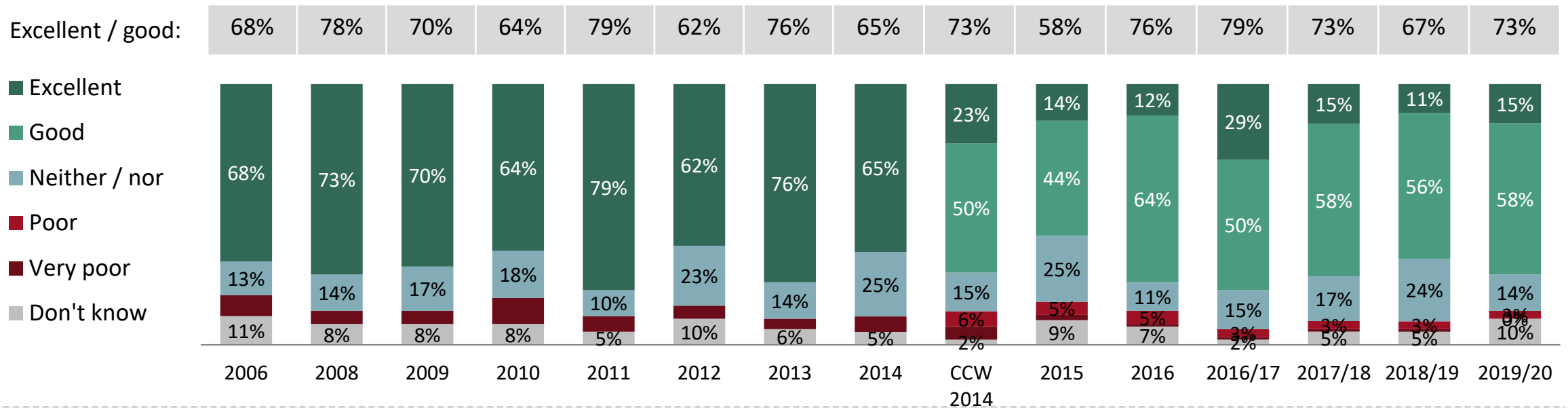


Appendix 2 – VFM and bills extra detail

Uninformed value for money of water supply

Uninformed value for money this year rebounds to 73%, up from the low point of last year. The rebound is evident in all three water supply areas – Bournemouth showing the highest rating at nearly 8 in 10.

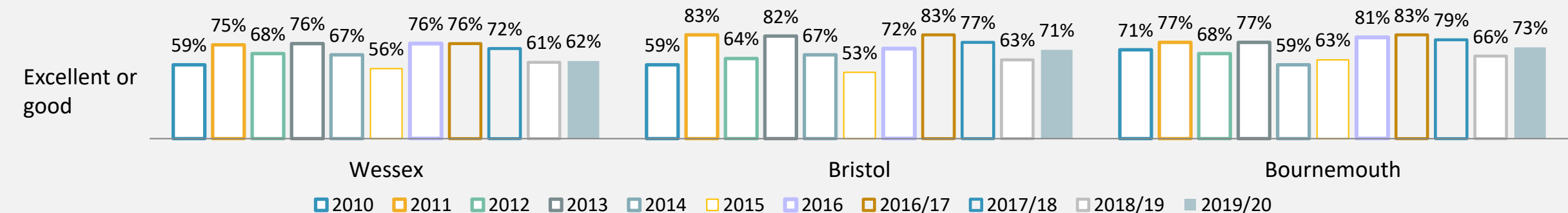
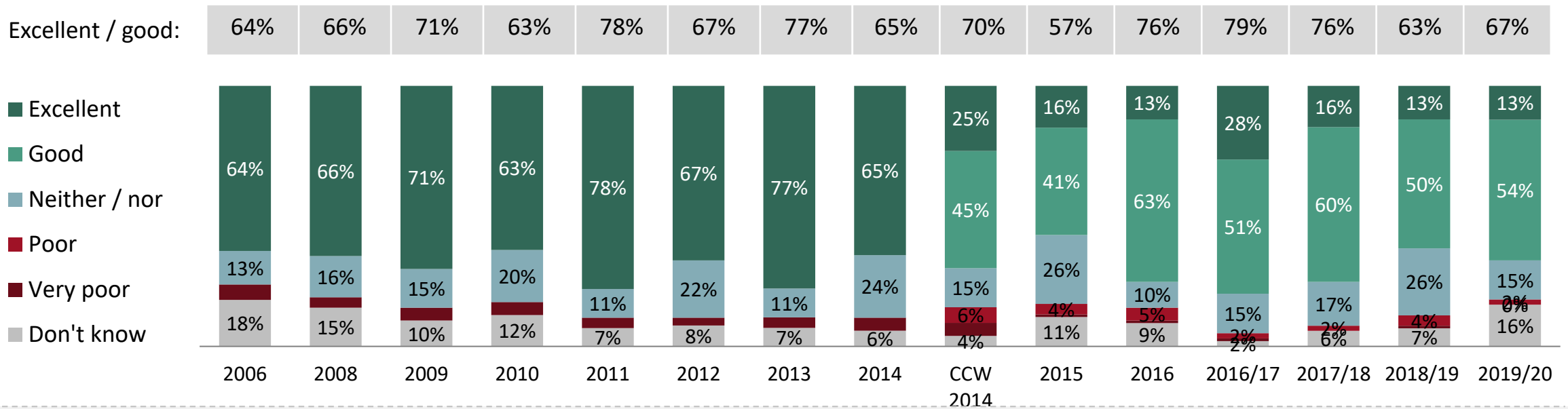
Q2(Q6d) How would you rate the drinking water supplies you receive from your water company in terms of value for money? (Base: all respondents)



Uninformed value for money of sewerage service

Uninformed value for money of sewerage services has risen this year since last year's low point, although overall we still do not see a return to the same level as 2017-18.

Q4 (Q7d) How would you rate the sewerage service you receive from Wessex Water in terms of value for money?
 (Base: Not private supply (718))

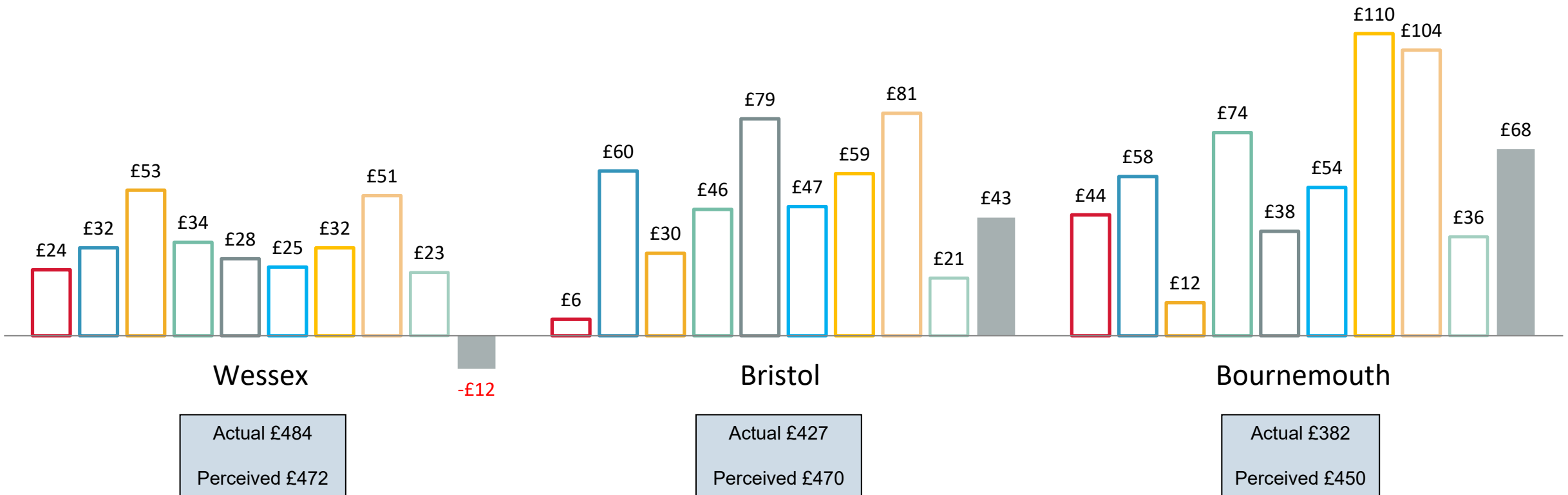


Perceived bill size – estimated versus actual

Customers in Bristol and Bournemouth regions continue to overestimate their bill price, but no longer the case in Wessex, where estimates are most accurate (slightly underestimating on average)

Q20 (4a) Roughly how much do you think you currently pay, combining your water supply and sewage service? (Base: All those who can estimate bill, 438)

■ 2011
 ■ 2012
 ■ 2013
 ■ 2014
 ■ 2015
 ■ 2016
 ■ 2016/17
 ■ 2017/18
 ■ 2018/19
 ■ 2019/20



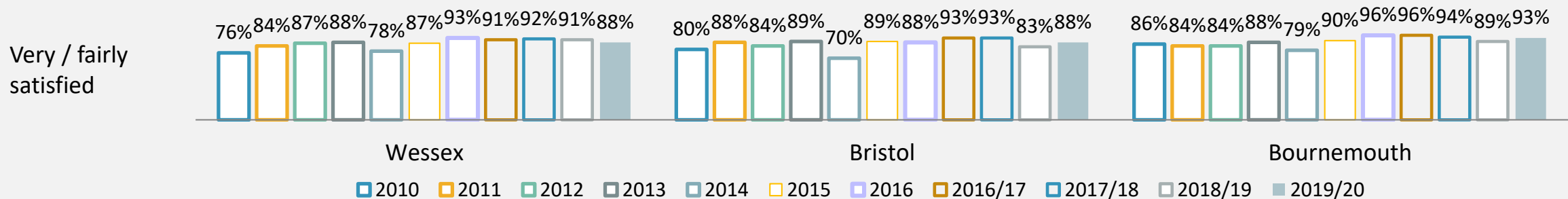
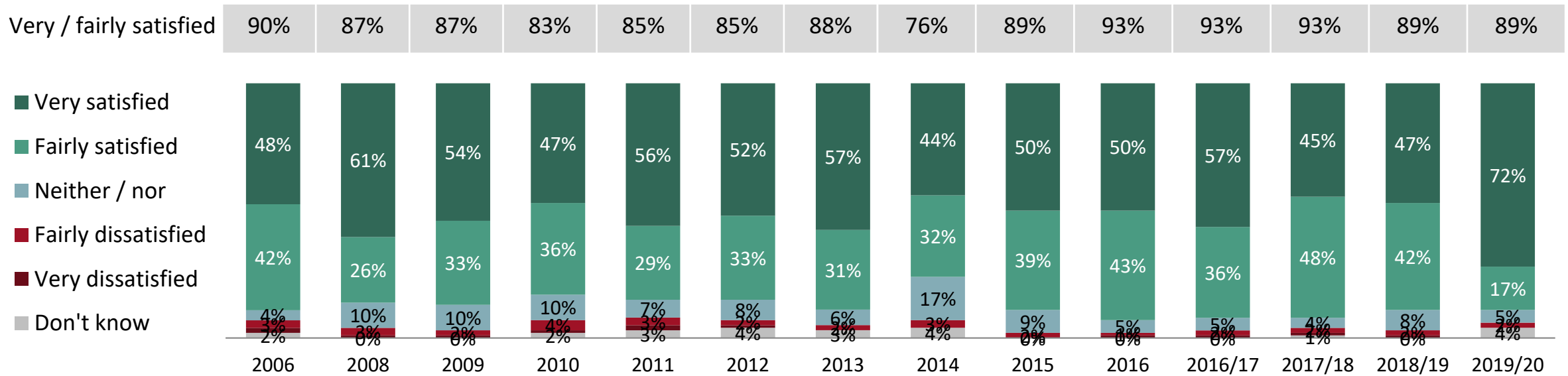


Appendix 3 – Satisfaction and NPS extra detail

Satisfaction with water supply

Satisfaction with **water supply** specifically remains good at 89%, matching last year. The Wessex supplied area has seen a slight directional decline over the last year, as satisfaction in the Bristol and Bournemouth areas picks up slightly.

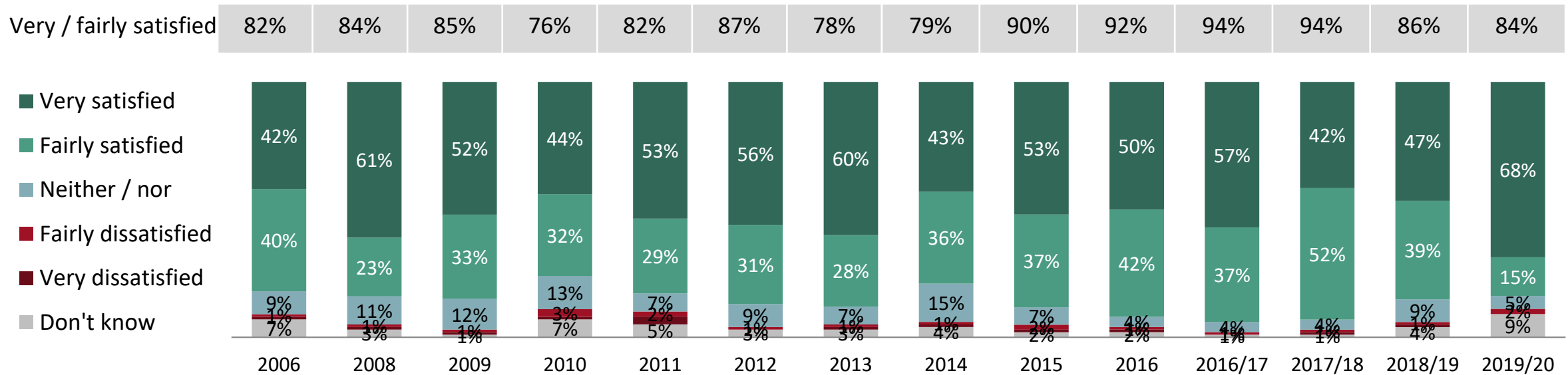
Q12(6a) How satisfied are you with the water supply you have received from your water company? (Base: All)



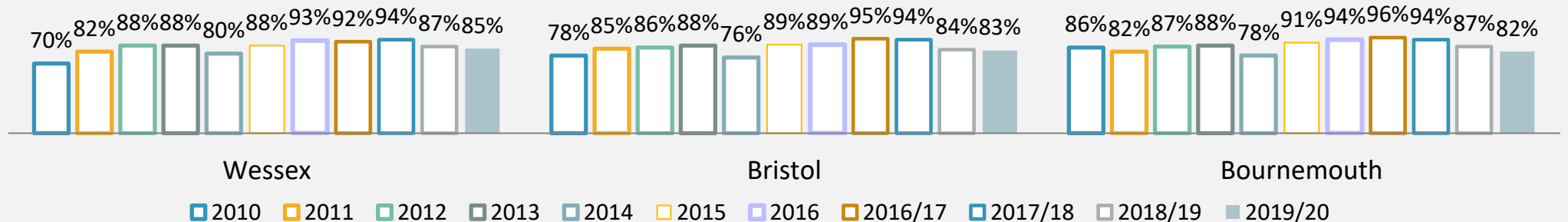
Satisfaction with sewerage services

Satisfaction specifically with sewerage services is in line with the historic norm – but remains below higher levels from 2015-18. All three supply areas see a similar level. Few are actively dissatisfied; the erosion of satisfaction is down to greater ambivalence / uncertainty.

Q13(Q7a) How satisfied are you with the sewerage service you have received from Wessex Water over the last 12 months? (Base: Not private supply)



Very / fairly satisfied



Reasons for being a 'promoter'

Generally happy / no problems

They provide a good service and never had any problems with them.

Because I've always been happy with the service they provide

Provide an effective and efficient service

Never had any problems with them

Never had reason to complain

Always used them, had good service

Simply no problems come to mind to not recommend them I am happy with the billing and the nice magazine we receive for free

I had cause to contact them because of an internal leak and the response was impressive

Increased mentions of environment

They support the environment and stop rivers from being polluted

They have a good track record for trying their best to work to help the environment

They look after the sewerage system and rivers making sure they keep it up to good standards

...cleans up rivers and stops pollution in rivers and lakes

...keep lakes rivers free from litter and chemicals

It's great for the environment and the community

...I think they look after beaches and rivers around here as well, making sure they are monitored and not affecting the environment too much

They perform really well generally and keep rivers and reservoirs clean

A close-up photograph of a fountain pen nib. The nib is black with a silver-colored tip. The tip is covered in a fine, granular texture. The nib is positioned vertically, and the background is a soft, out-of-focus grey. A semi-transparent teal banner is overlaid across the middle of the image, containing the text "Appendix 4 – Image and comms extra detail".

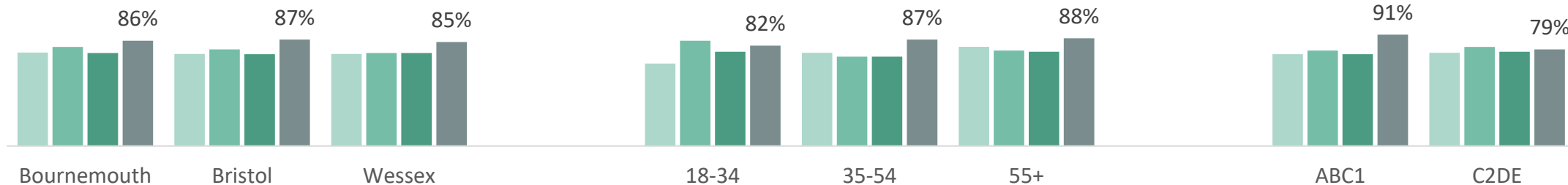
Appendix 4 – Image and comms extra detail

Components of Trust

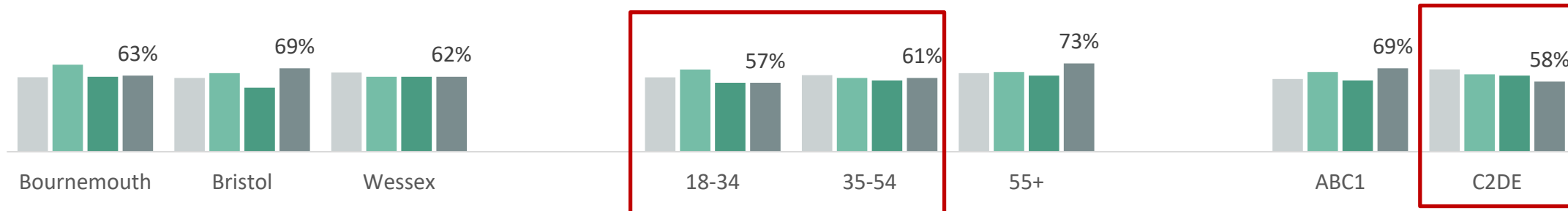
Components of trust – particularly the more emotional ‘caring’ - are adrift amongst the lower social grade groups and younger age cohorts. More focus on engaging with these groups at a personal level?

2016/17 2017/18 2018/19 2019/20

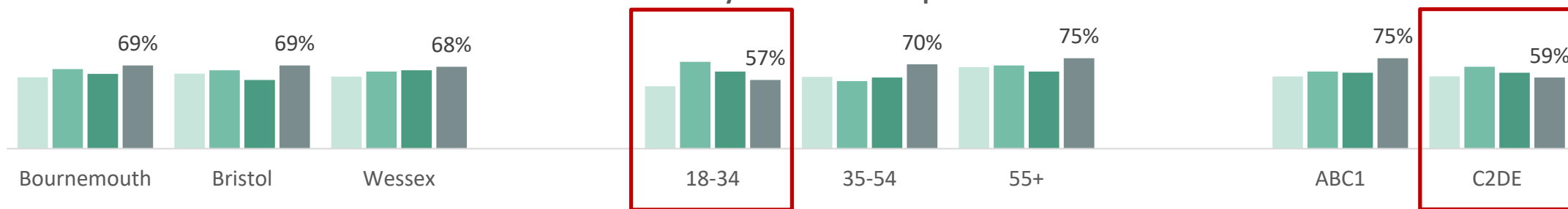
They are experts at what they do



They care about their customers



They deliver on their promises

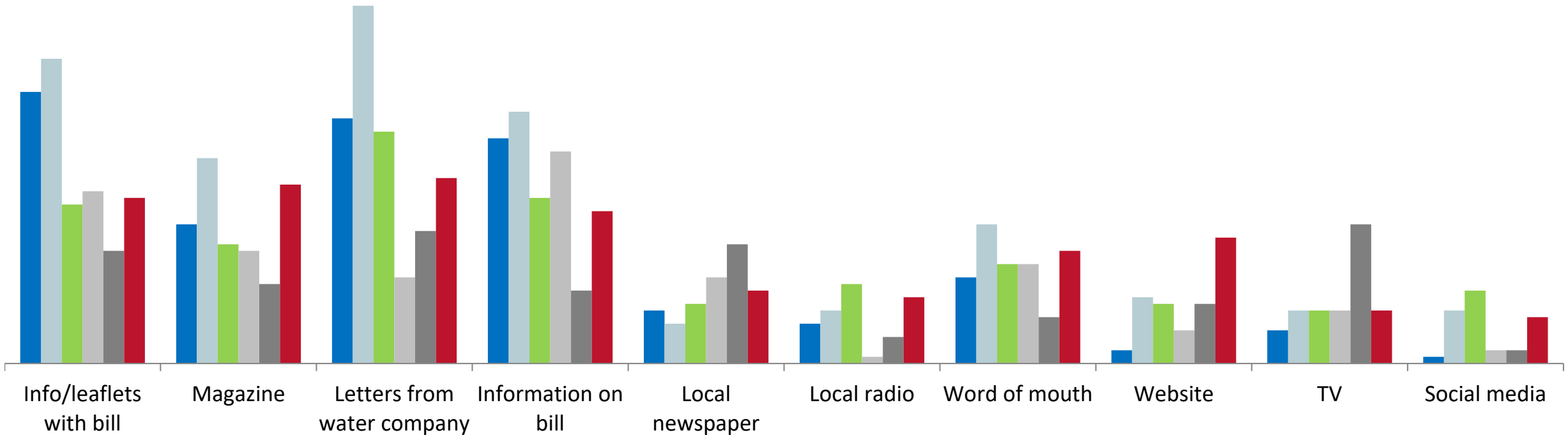


Recall of recent communications by segment

The more engaged segments are notably more likely than others to recall information through more 'formal' channels like leaflets with the bill and letters from Wessex Water. To reach less engaged segments is there more potential via more 'intrusive' or personally targeted and relevant channels?

Q24(19) Please can you tell me all the different ways that you have received information from your company or heard about your water company in the last year? (Base: All 2019-20)

■ Engaged comfortable ■ Engaged stretched ■ Potentially receptive ■ Settled unengaged ■ Transactional unengaged* ■ Cost-sensitive unengaged



Net promoter score – by recall of comms message

Some evidence that those who remember certain information or messages about Wessex Water have a higher NPS. We cannot be sure of causality (those more 'involved' may register certain messages) but there is a sense that widely relevant, practical messages and positive actions correlate with higher NPS, along with environmental action.

Customers who have heard / seen each of these topics of information about Wessex Water



Q25. And what did you hear about Wessex Water or what was the subject of that information?

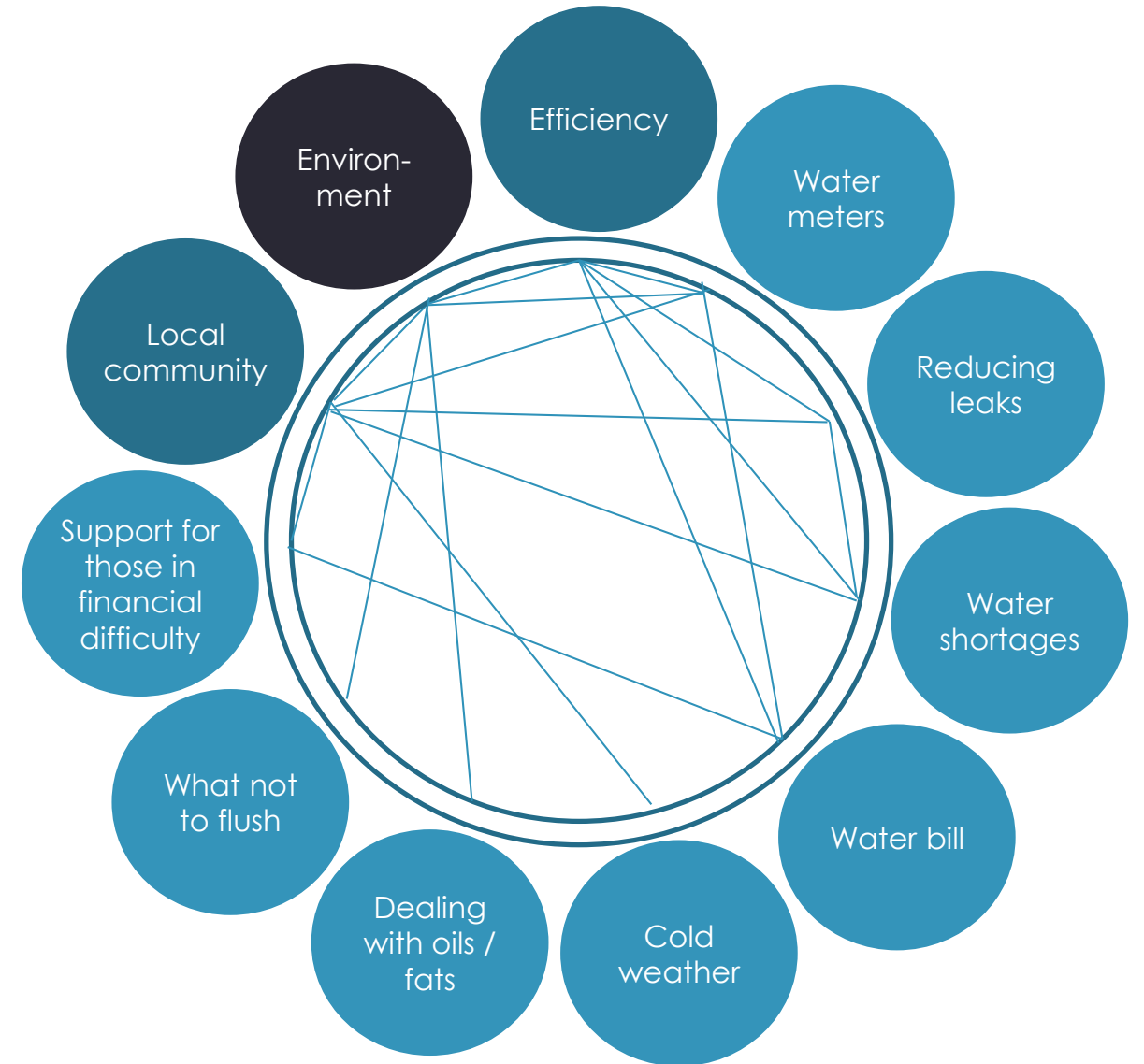
* CAUTION Low sample sizes (<80) – indicative only

Communication themes

There are many different messages Wessex Water may need to communicate. They are often interrelated - and might not be clearly defined in consumers' minds. Wessex may need to consider what to focus on to help build a 'single-minded' brand (reasons to believe in 'For You. For Life').

The most effective focal points for communication are likely to be widely relevant and engaging, that relate to Wessex Water activities with tangible benefits to customers. Could 'pillars' or themes of communication be used to structure campaigns?

Some evidence that (pre-COVID19) information about helping the environment has become more salient – and is associated with higher NPS and trust. Messages related to environment could be easy for people to grasp (plastic as a pollutant **in water** is a widespread popular concern); they also may be more readily passed on via 'word of mouth' as it is an emotive topic that people care about. The next waves of research will provide evidence if 'environment' could be a theme for future focus, or if it reflects a transient phase of public attention.





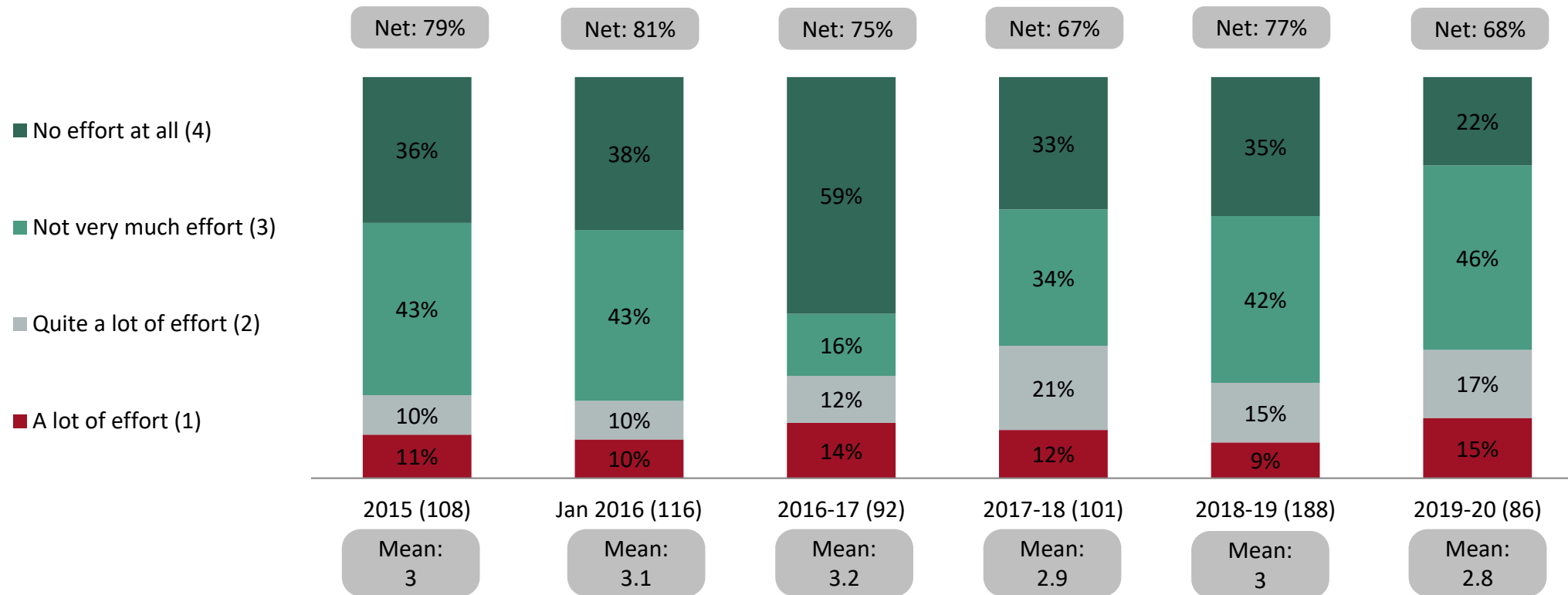
Appendix 5 – Dealing with queries

Effort – dealing with queries

The effort score has fluctuated year-on-year. Given relatively small base sizes, the changes over the last two years are not significant.

Q7(2c) Taking everything into consideration, how much effort did it take you to resolve your query with Wessex Water?

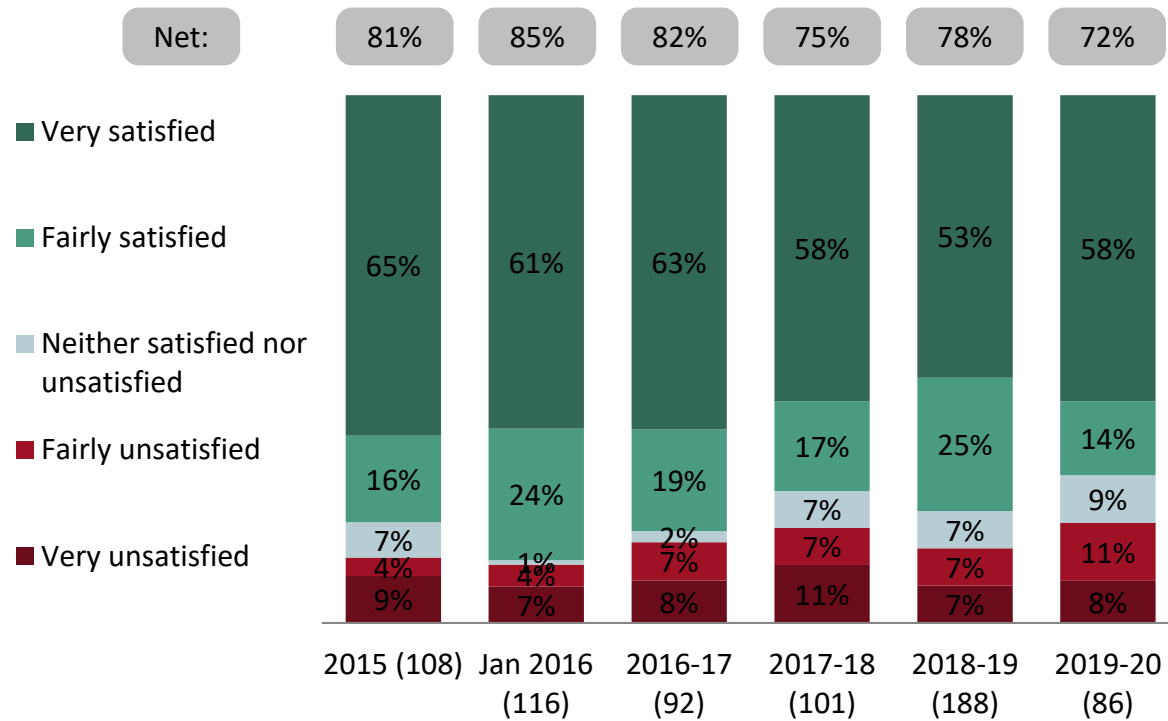
Base: Contacted Wessex with a query relevant to Wessex



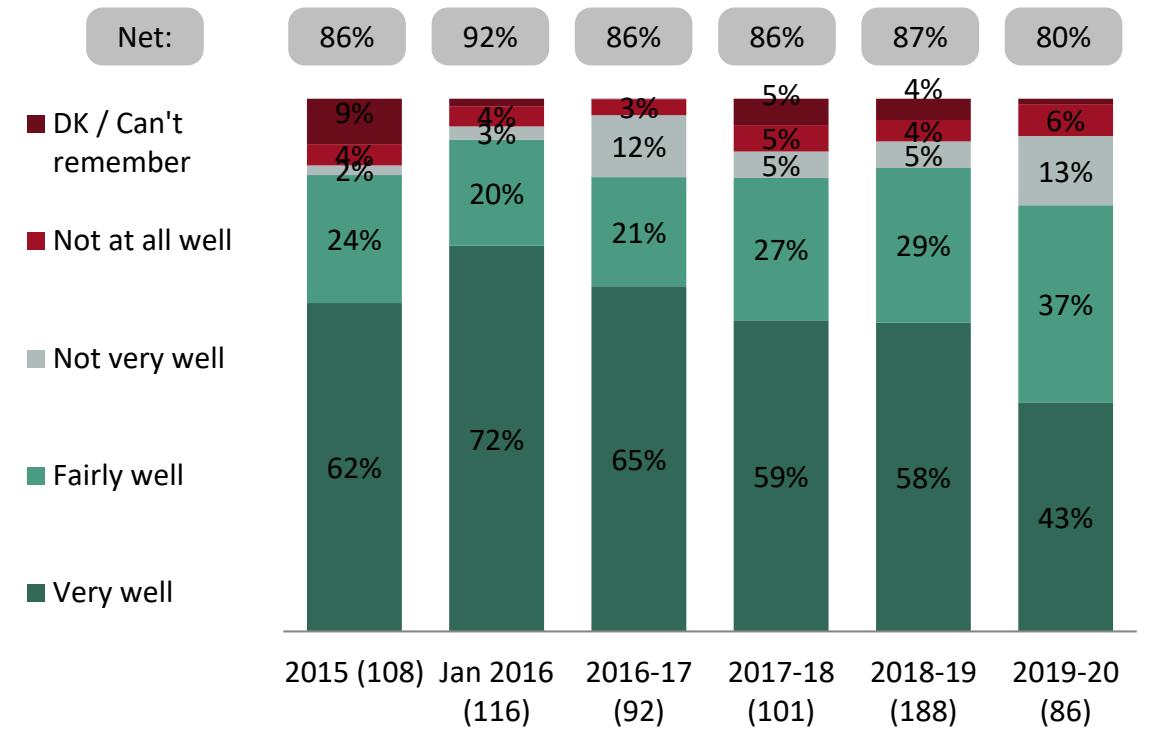
Satisfaction and fair treatment – dealing with queries

Satisfaction with how queries were dealt with has remained at around 7 in 10, and there's no significant change in perception of fairness – over 8 out of 10 rate Wessex as performing well for fair treatment.

Q8(2d) And overall, how satisfied were you with the way your query was dealt with by Wessex Water?



Q9a (Q3c) Thinking back to the contact you've had with your water company in the last 12 months, how well do you think they have performed in terms of treating you fairly?



Base: Contacted Wessex with a query relevant to Wessex

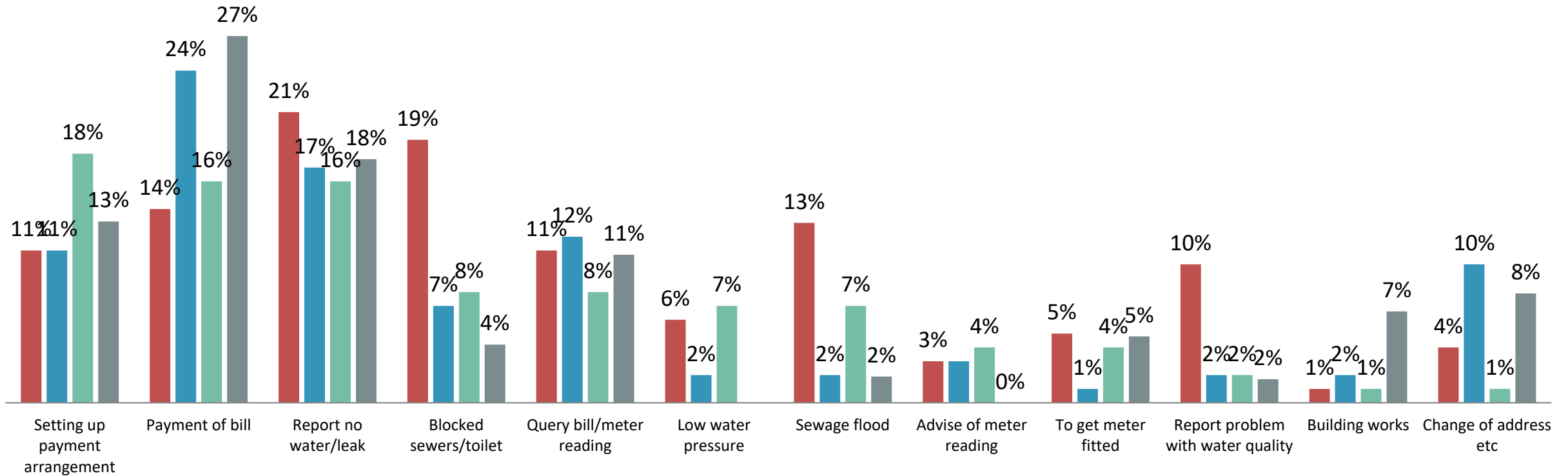
Reasons for contact

Amongst our sample who have contacted Wessex Water in the last year, there appears to be a higher incidence of service issues than in previous years.

Q6 (2b) What was the main reason for your contact?

Base: Contacted Wessex with a query relevant to Wessex

■ 2019-20 (86) ■ 2018-19 (188) ■ 2017-18 (101) ■ 2016-17 (92)



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

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

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

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

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