

# Phase 3 Final Report

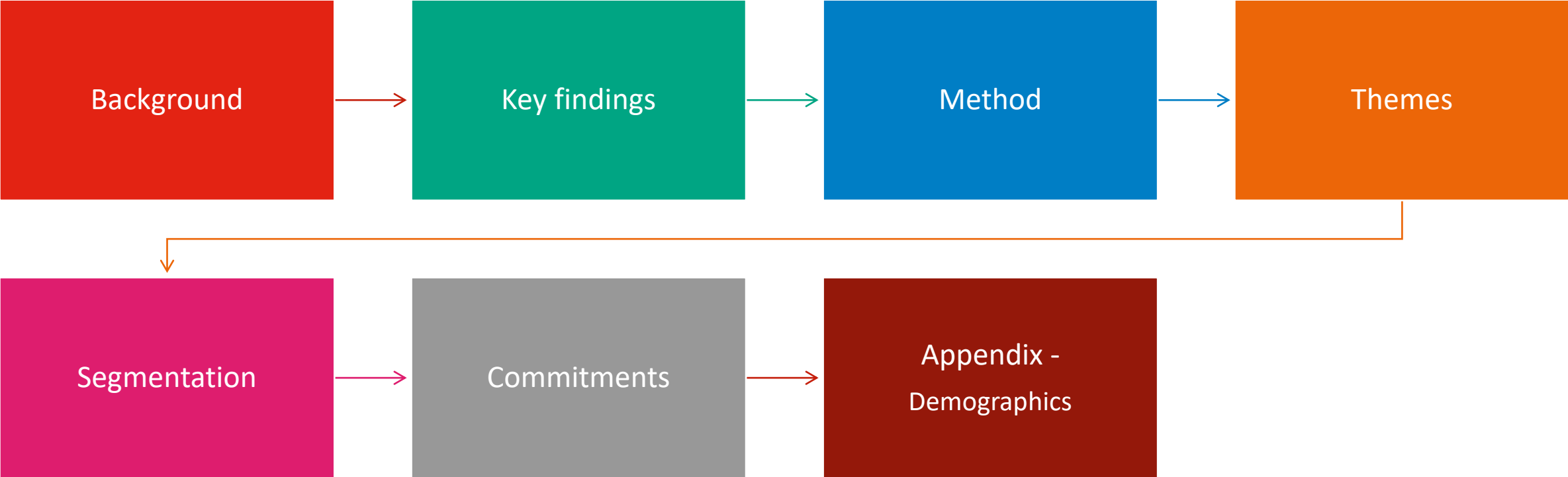
Prepared for Wales and West Utilities  
Prepared by Evelin Roberts, Sarah Warbis, Dawn  
Mulvey and Kayte Ashton

18 January 2021  
Project No: 1153



**IMPACT**  
FROM INSIGHT TO INFLUENCE

# Content



# Background

As a part of Wales and West Utilities' RIIO-GD2 submission, extensive research was done to identify customer priorities for the next 5 years in order to inform spending on particular business areas. However, significant societal, environmental and economic changes have taken effect due to the pandemic. Hence, new research is needed to uncover customer priorities in the wake of these changes.

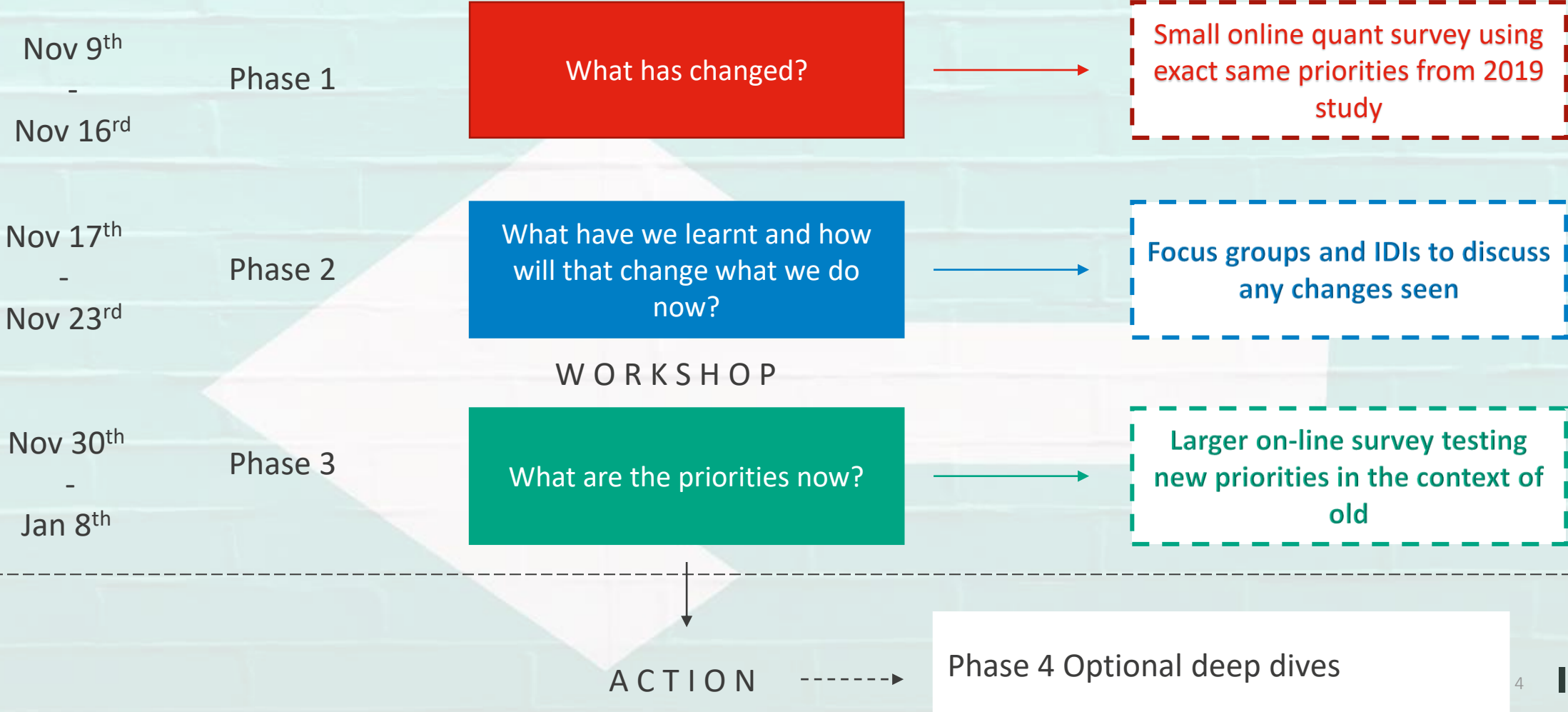


## Areas of focus:

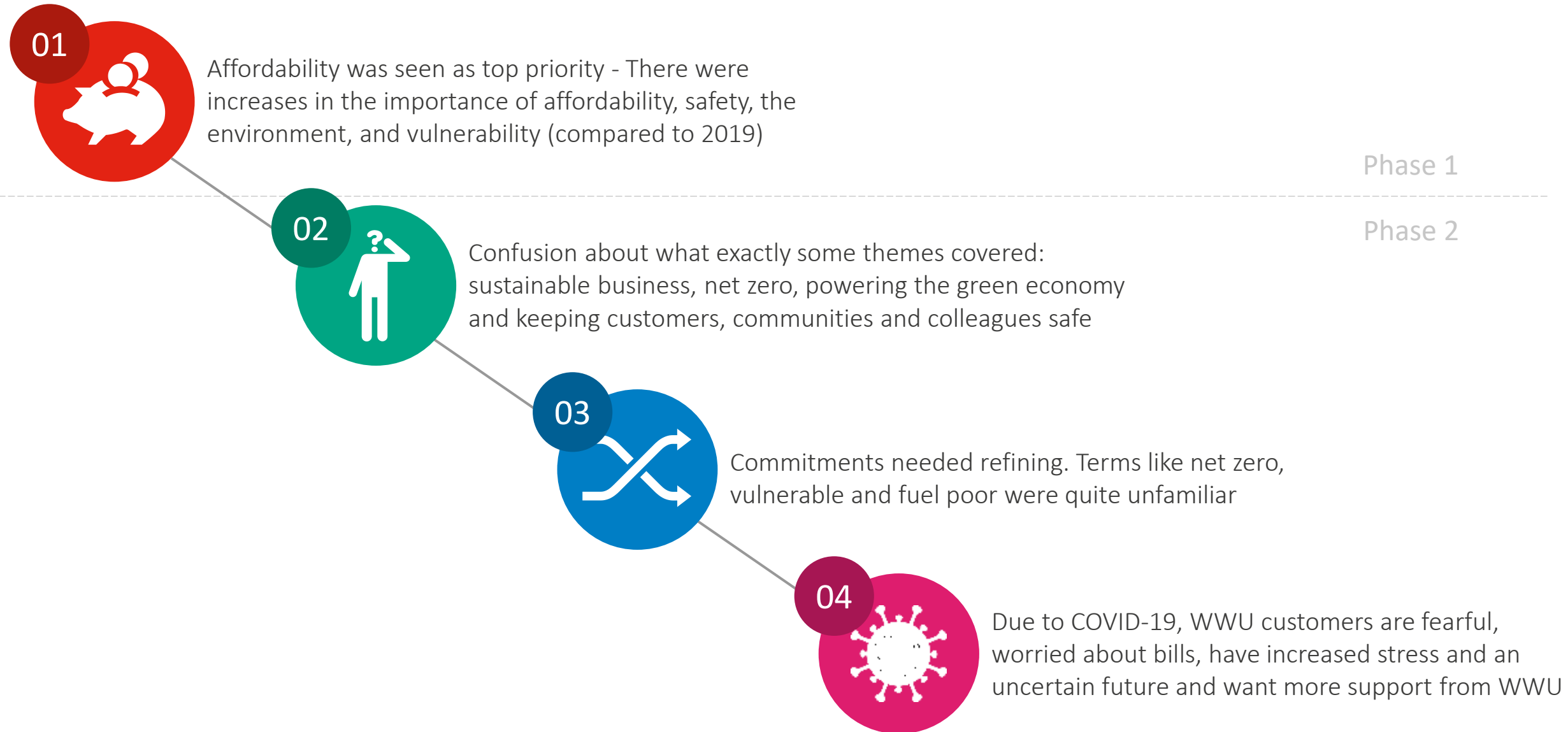
- Our transition to net zero
- Powering the green recovery
- Keeping bills affordable
- Sustainable business
- Supporting those most in need
- Keeping our customers, communities and colleagues safe

# Phases

We have developed a 3 phase approach, **testing if, and how** business plan priorities (tested in 2019) have changed. And, if they have changed, what does WWU need to do to stay relevant going forward.



# Key Findings From Phase 1 and 2



# Phase 3 – Executive Summary

## Themes

Adding relatable examples helps aid understanding. Net Zero was more readily understood once clearly explained what the theme entailed.

Support for those most in need requires specific examples otherwise people can become confused with the association with COVID.

Keeping customers, colleagues and staff safe was generally well understood with higher agreement on commitments fitting into the theme.

## Priorities

Generally, the most important areas are consistently safety (attending gas emergencies), bill affordability and recycling waste.

Environmental statements have increased in priority overall with the biggest driver for those 18-34 living in an urban setting

There has been a general trend of placing importance on commitments which make a change here and now vs later on or in a chance occurrence

## COVID

People are generally more concerned overall about all measures than before COVID, especially their local economy and community.

There is a general increase in support for commitments associated with helping the vulnerable which reflects peoples acute awareness of vulnerability during COVID as mentioned in the groups

Those aged 18-34 and vulnerable customers were more likely to be concerned about the various measures before the pandemic and currently.



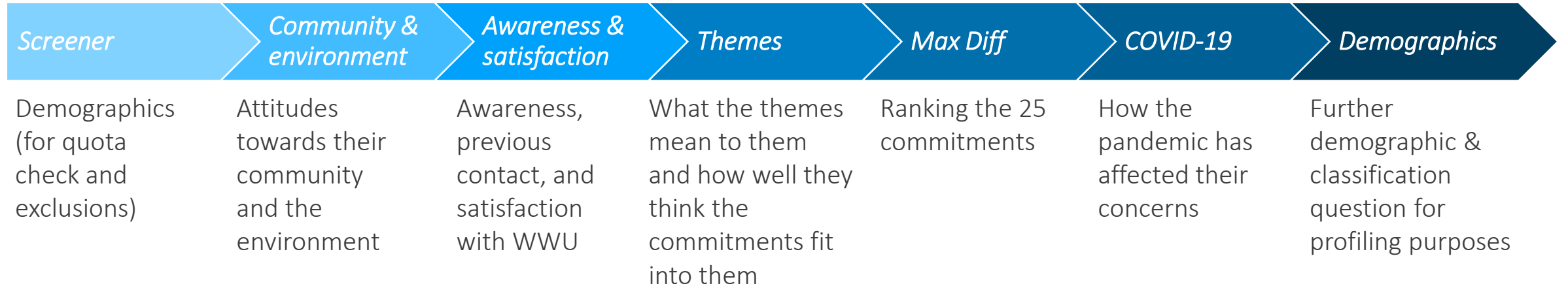
Phase 3 - approach

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Methodology and Sample

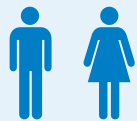
The 15-minute quantitative survey was completed online by 804 customers in December 2020.



We spoke to **804 WWU customers** in total representing different:



Regions



Genders



Ages



Social Grades



Fuel Poor Statuses



Vulnerable circumstances



Rural/Urban Locations



Household statuses



Ethnicities



The themes

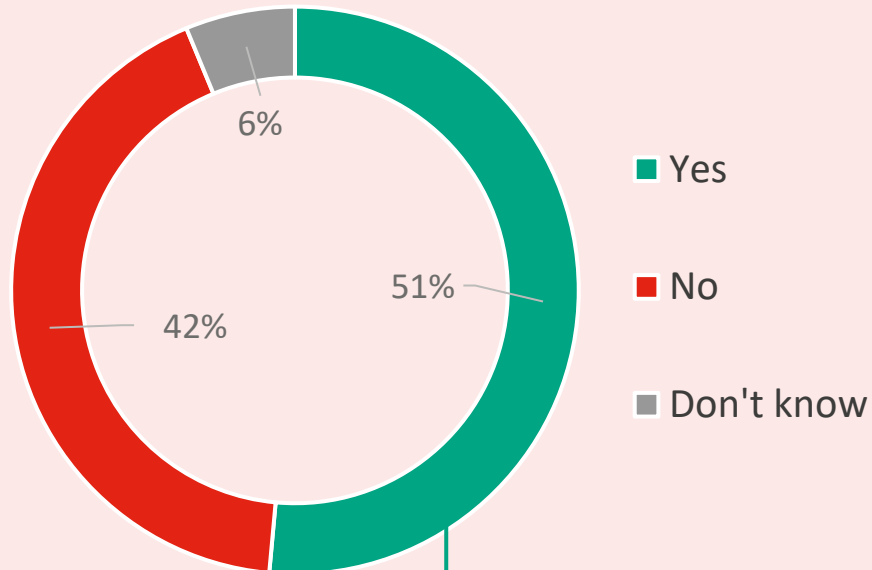
**IMPACT**

FROM INSIGHT TO INFLUENCE

# Our transition to net zero

**Focus group findings:** Customers had very little understanding of what 'Net Zero' meant so really struggled to understand what the transition was as knowledge of green gases was limited and what WWU were doing to get there.

## Have you heard of the term 'Net Zero' before today?



Significantly higher for men and SEG ABC1

## What does this mean to customers?

Although many were unsure, common themes included being carbon neutral, carbon offsetting, using renewables, and protecting the environment.

Some people misunderstood this as producing no carbon emissions at all in the future. A small few thought it referred to finances.

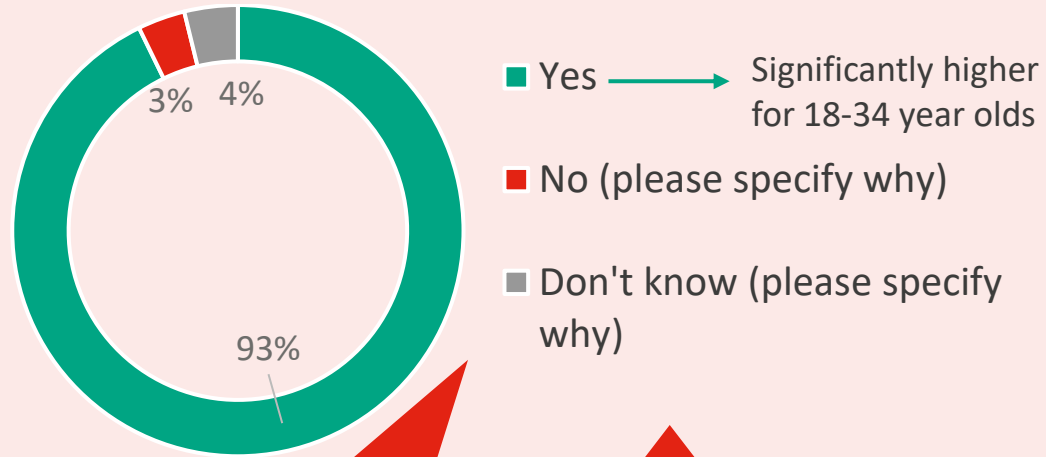
“100% renewable energy offsetting the carbon footprint and emissions”

“The offset process so that carbon emissions are offset by other means to give a net zero effect”

# Our transition to net zero

*“This includes preparing the gas network to be ready to transport green gas e.g. biomethane and hydrogen. It also includes reducing vehicle emissions and recycling materials”*

Does WWU’s description cover what customers would expect to be included under this theme?

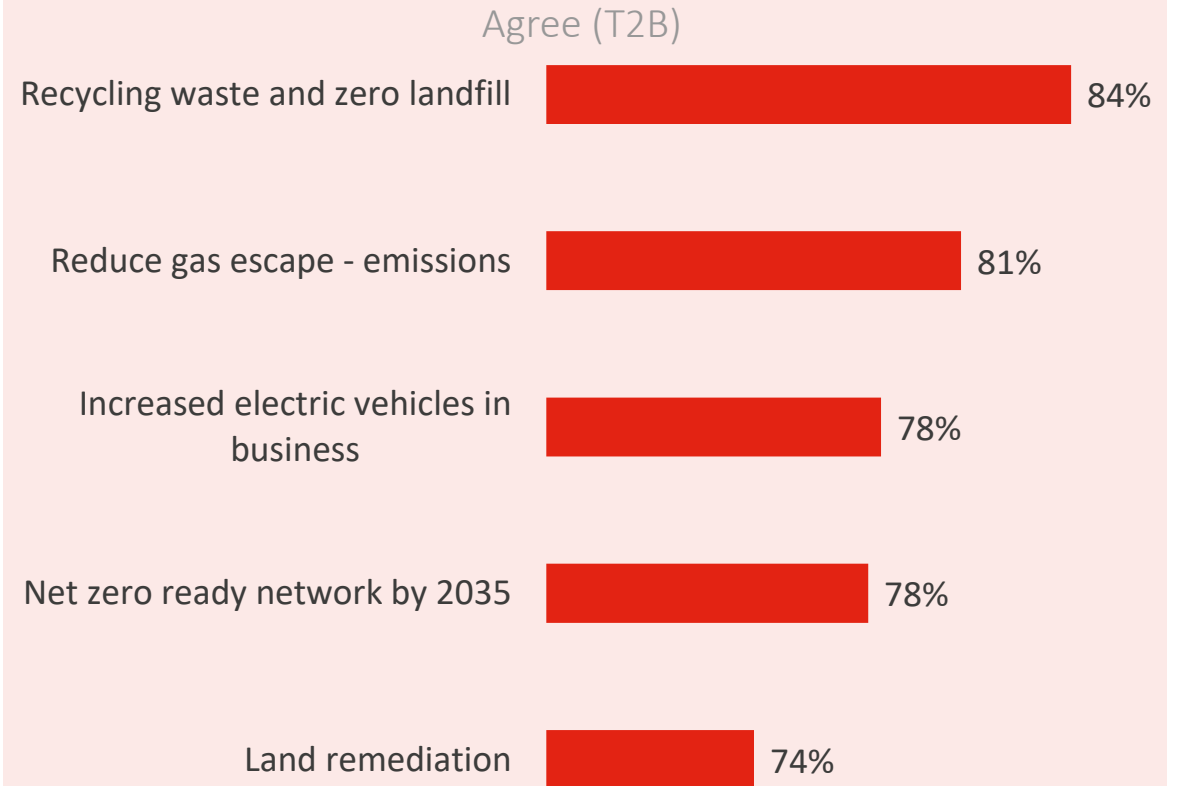


“I would expect the company to develop or use renewables as part of its operations.”

“No mention of actual emissions”

Range ‘yes’ : 80% -96%

To what extent do you agree the following statements describe WWU’s ‘transition to net zero’?



# Powering the green recovery

**Focus group findings:** Lack of understanding was based around the fact customers didn't understand how a fossil fuel business could be 'green' and thought it focused on energy efficiency and switching away from gas.

## What does this mean to customers?

There was uncertainty around the phrase 'green recovery', for many it means using renewable energy, undoing the damage done to the planet, reducing waste and being carbon neutral. A small minority felt it meant moving away from using gas.

“Regenerating the environment from damage already done”

“Means they are trying to move forward and reduce their carbon footprint by using renewable energy”

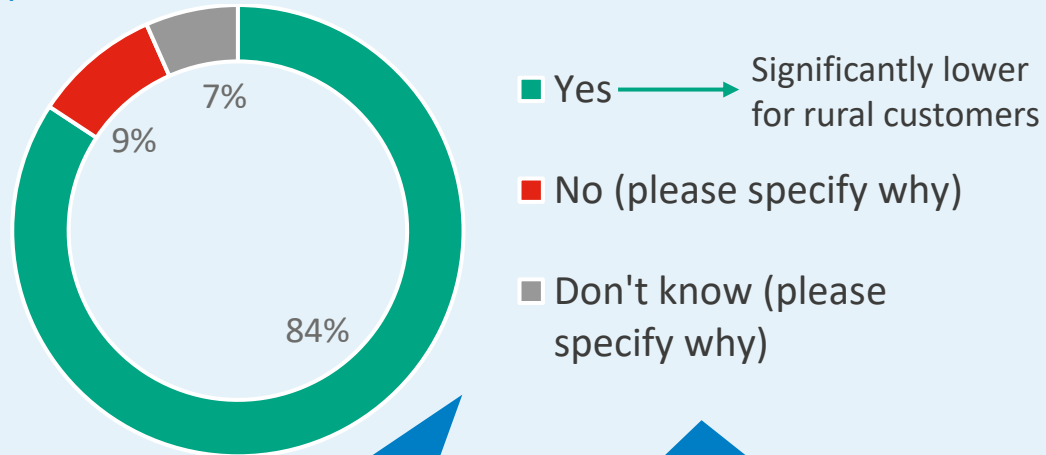
“Transfer from gas to renewable energy sources”



# Powering the green recovery

*“This is linked to our transition to net zero, but relates to our investments, which will in turn support jobs, skills, the supply chain and local economies”*

Does WWU’s description cover what customers would expect to be included under this theme?



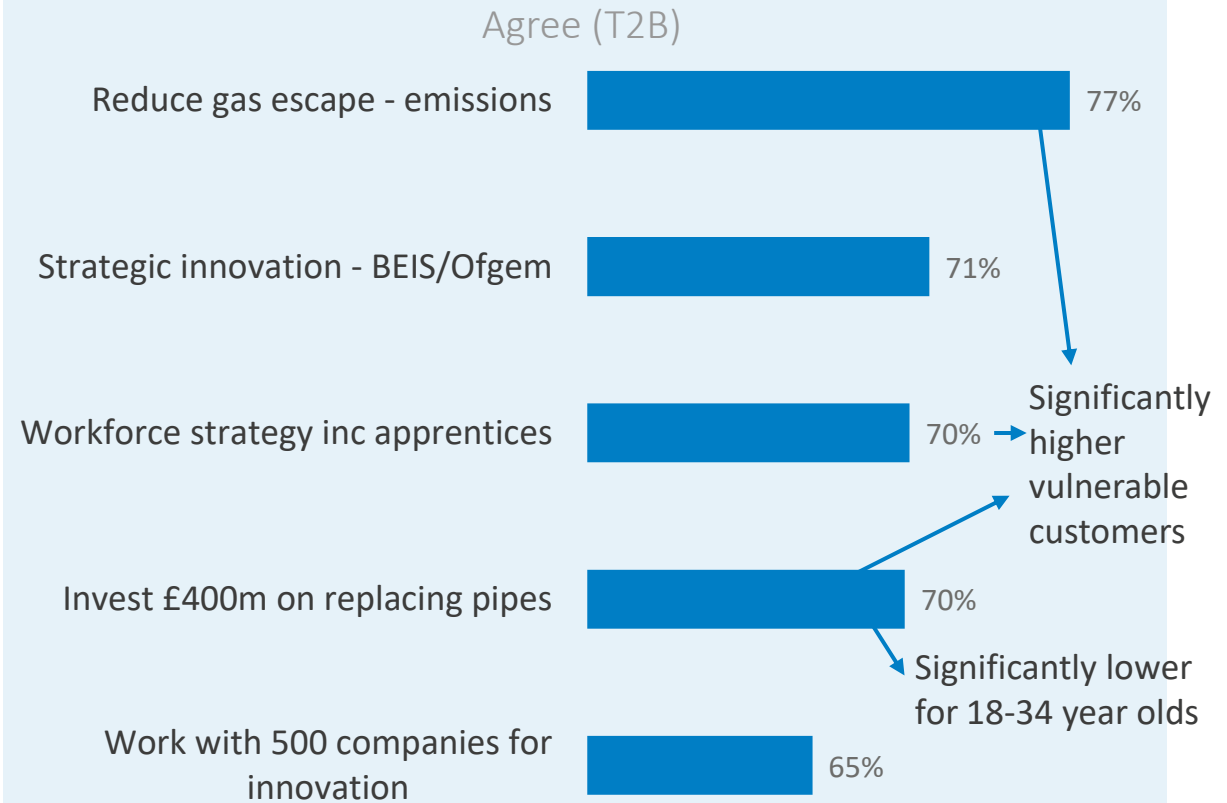
- Yes → Significantly lower for rural customers
- No (please specify why)
- Don't know (please specify why)

“Not specific enough, too wishy washy - typical company talk”

“the first half would make sense, but not sure how being greener would not necessarily support jobs /local economies etc.”

Range ‘yes’ : 80% -96%

To what extent do you agree the following statements describe WWU ‘powering the green recovery’?



Q8b WWU describes its role in ‘powering the green recovery’ as follows: “This is linked to our transition to net zero, but relates to our investments, which will in turn support jobs, skills, the supply chain and local economies” Does this description cover what you would expect to be included under this theme? Base (All): 804. Q8c To what extent do you agree the following statements describe WWU ‘powering the green recovery’? Please use a scale from 1 to 5, where 1 is ‘Strongly disagree’ and 5 is ‘Strongly Agree’. Base (All): 804.

# Sustainable business

**Focus group findings:** Understanding centered around financial sustainability and running a business with a suggestion that this was an umbrella term for all the themes within the business.

## Significantly higher for:

- ★ Those aged 55+
- ★ Men
- ★ Rural customers
- ★ Vulnerable customers
- ★ SEG ABC1

## What does this mean to customers?

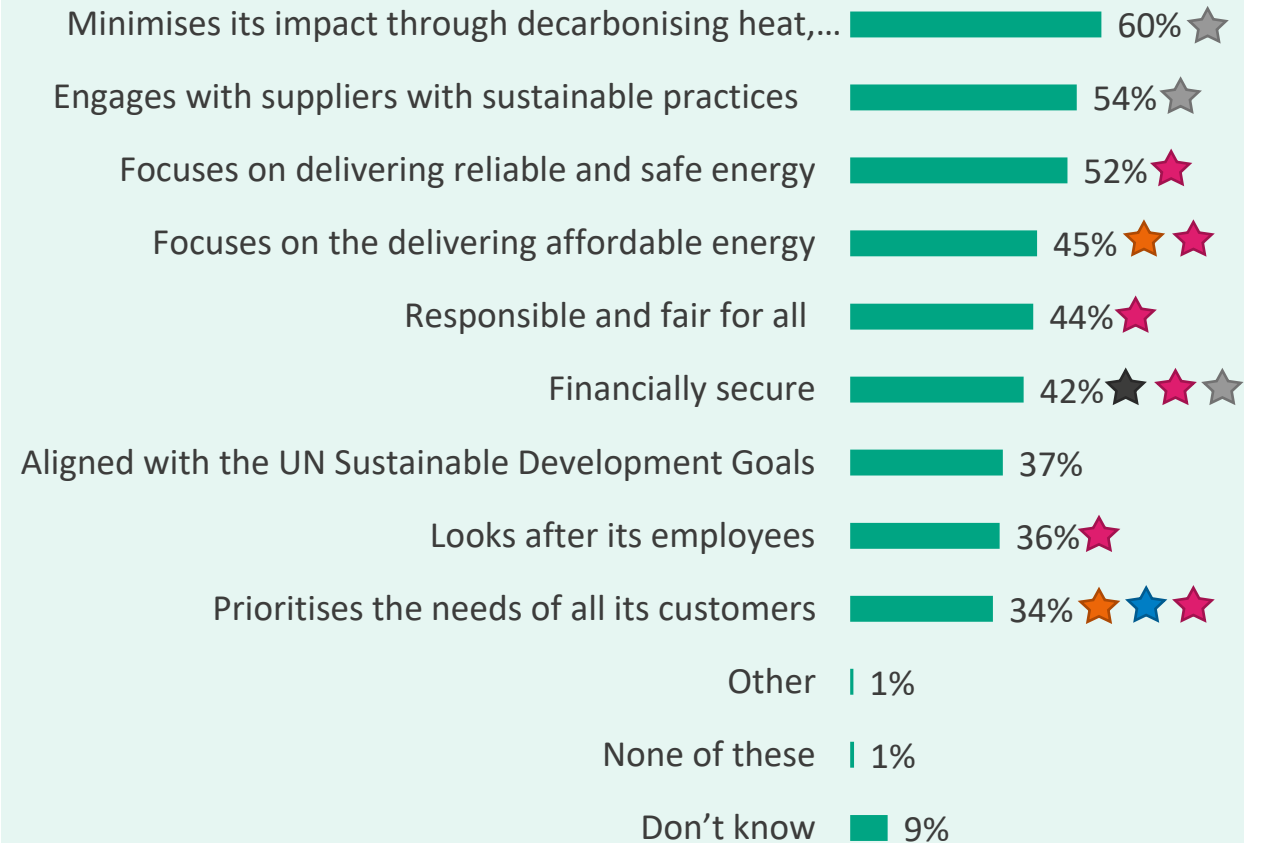
Although many were unsure, there was consensus that it is looking towards the long-term future. Customers varied in whether they thought it referred to environmental or economic sustainability.

“Staying in profit!! The eco-warriors have hijacked the meaning of 'sustainable'”

“Environmentally friendly policies, while making a profit”

“Reducing emissions for a long-lasting future”

## Which statements describe a ‘sustainable business’ for a gas network by customers’ definitions?

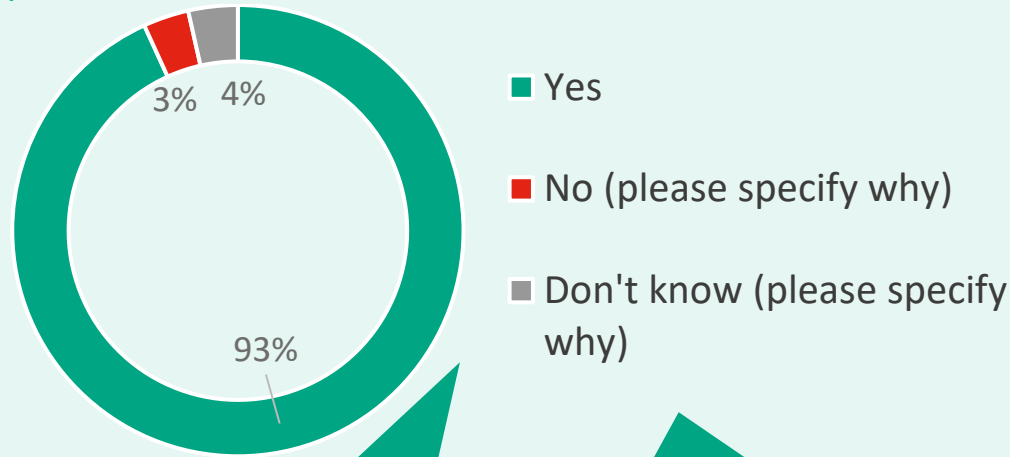




# Sustainable business

*“This is about us acting responsibly and fairly, it includes our work around diversity and inclusion and making sure that our business is reflective of the communities we serve, it’s about minimising our environmental impact, actively and continuously listening to our stakeholders, providing a reliable service now and into the future and considering the long term impacts of our work by aligning our commitments with the United Nations Sustainable Development Goals”*

Does WWU’s description cover what customers would expect to be included under this theme?

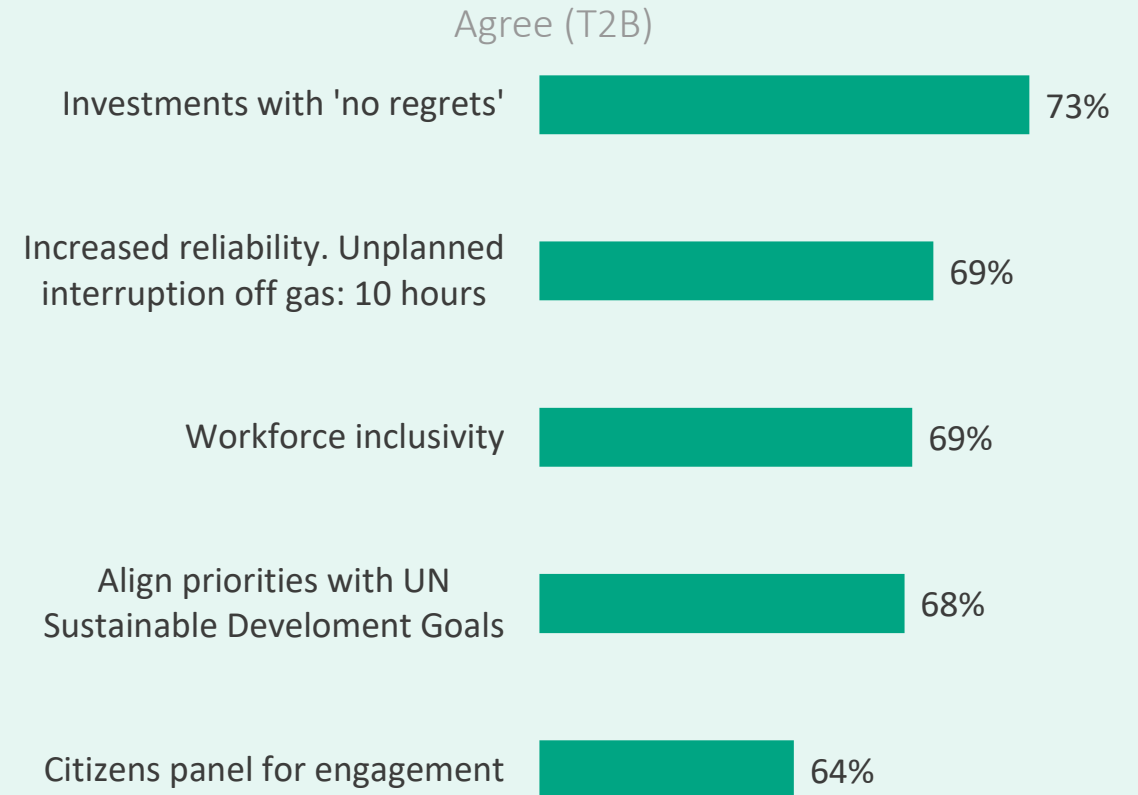


“I usually think of the word ‘sustainable’ in regards to environmental causes”

“Buzz word after buzzword”

Range ‘yes’ : 80% -96%

To what extent do you agree the following statements describe WWU being a ‘sustainable business’?



Q11b WWU describes being a ‘sustainable business’ as follows: “This is about us acting responsibly and fairly, it includes our work around diversity and inclusion and making sure that our business is reflective of the communities we serve, it’s about minimising our environmental impact, actively and continuously listening to our stakeholders, providing a reliable service now and into the future and considering the long term impacts of our work by aligning our commitments with the United Nations Sustainable Development Goals”. Does this description cover what you would expect to be included under this theme? Base (All): 804. Q11c To what extent do you agree the following statements describe WWU being a ‘sustainable business’? Please use a scale from 1 to 5, where 1 is ‘Strongly disagree’ and 5 is ‘Strongly Agree’. Base (All): 804.

# Keeping bills affordable

**Focus group findings:** This was broadly understood as maintaining a particular level of bill demand however some misconstrued this to mean the cost was being put onto developers and housing associations. Others believed it was linked to being a 'sustainable business' and levelling out fluctuations over time by becoming more efficient. Most maintained that the service should not suffer in order to keep bills down.

## What does this mean to customers?

Customers have a good understanding of what 'keeping bills affordable' means to them. For many it means making sure energy is affordable for everyone, especially poor and vulnerable customers. As part of this, they focused on making sure bills are in line with people's household income and minimal (in line with inflation) or no increases each year. Some acknowledged needing to keep WWU profits reasonable. Very few misinterpreted it as meaning reducing bills.

"Making sure the energy is affordable for everyone"

"Maintaining cost that can be afforded without going into fuel poverty or having to choose heat/ cooking over other essentials. Supporting those who would struggle with bills"

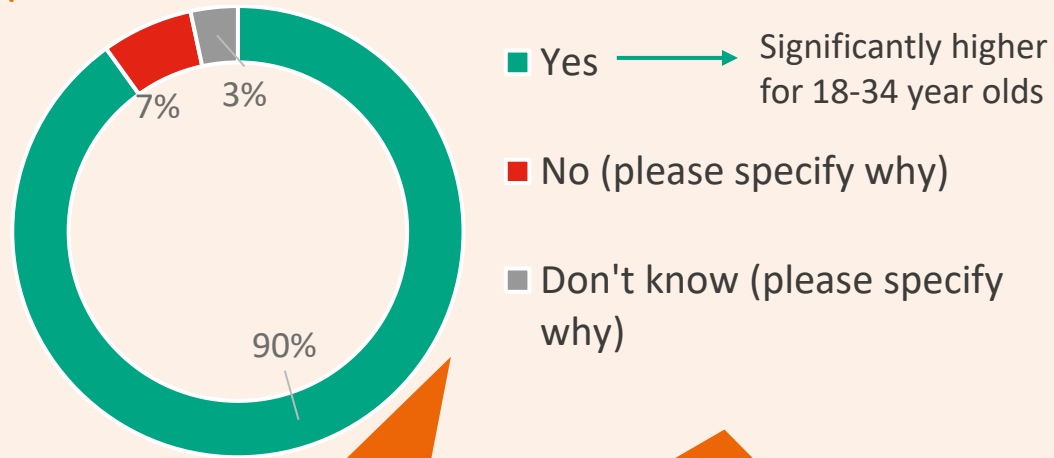
"Ensuring people before profit."



# Keeping bills affordable

*"To keep bills affordable, we will make sure that our processes are efficient and we will support this with innovation"*

Does WWU's description cover what customers would expect to be included under this theme?

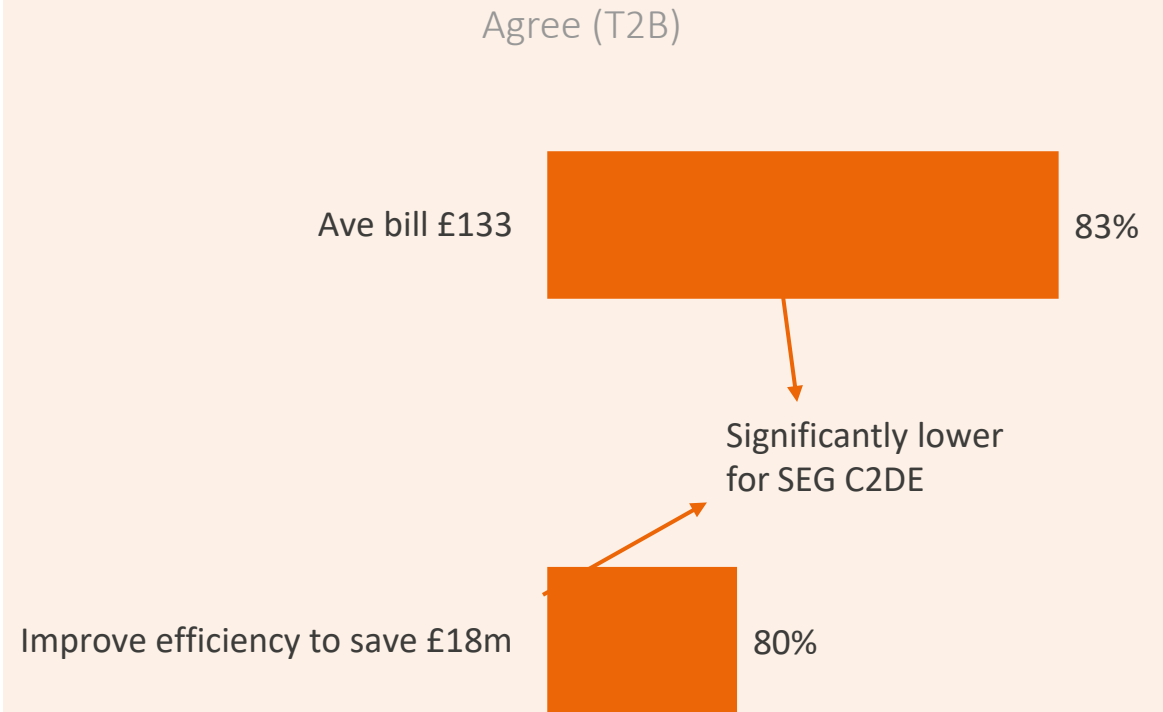


"Affordability should focus on the consumer not the company"

"Jargon not aimed at the consumer. Patronising."

Range 'yes' : 80% -96%

To what extent do you agree the following statements describe WWU 'keeping bills affordable'?



# Supporting those most in need

**Focus group findings:** This was also considered a top priority theme, especially with current events bringing to light how easily people can become vulnerable, having services which cater specifically for this group was highly supported.

## What does this mean to customers?

Customers have a good understanding of this theme. In particular they believe it means WWU are supporting those on a low income access gas, as well as supporting vulnerable customers (e.g. the elderly, those with young children, those with chronic illnesses) especially during power cuts.

“Those who find it difficult to pay through no fault of their own.”

“To protect and look after the most vulnerable. My nan is highly at risk for the corona[virus] so knowing if she needed gas fixing in emergency the staff have the right tools/ and safety measures it would put your mind at rest”

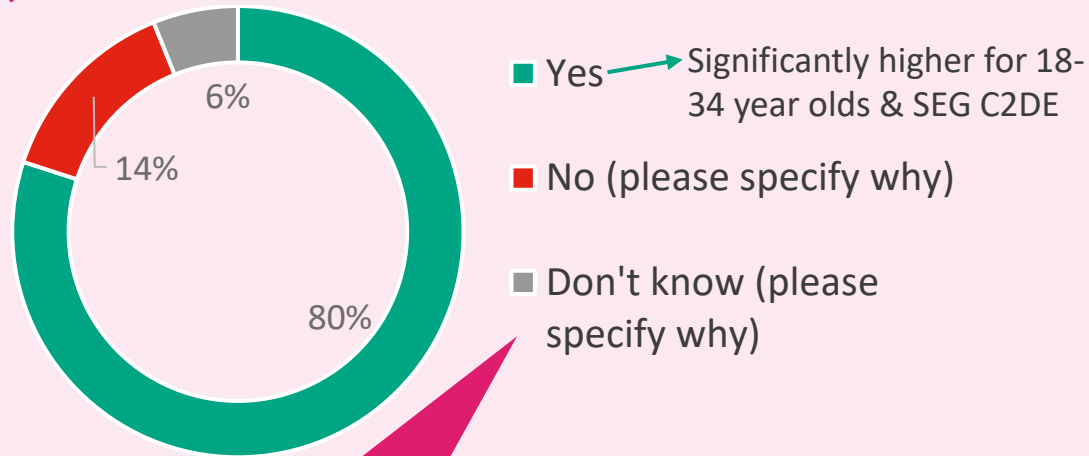
“Vulnerable, disabled, elderly people who may need help.”



# Supporting those most in need

*“Through tailored, targeted quality assured services, collaborative working and delivering what we promise”*

Does WWU’s description cover what customers would expect to be included under this theme?

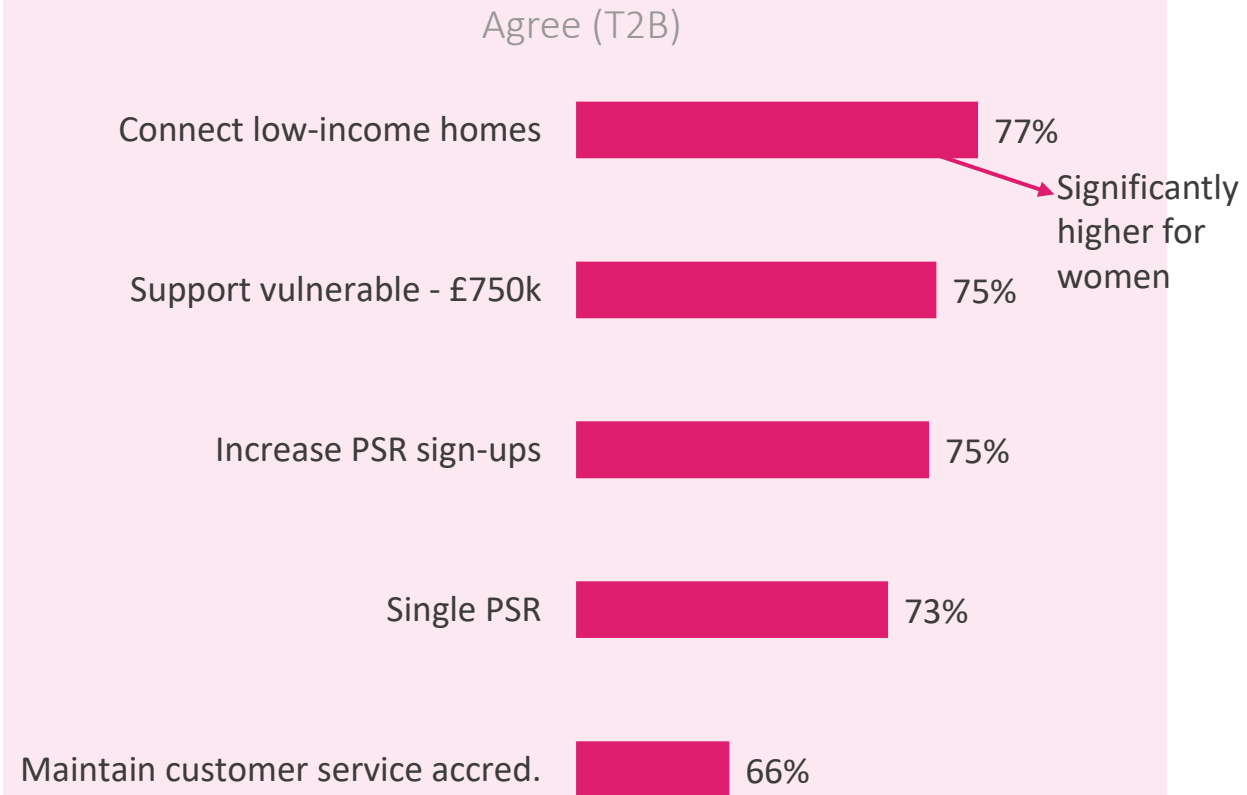


“I thought it would include people on low income and housing who need help with their bills”

“It doesn't make sense to me”

Range ‘yes’ : 80% -96%

To what extent do you agree the following statements describe WWU ‘supporting those most in need’?



# Keeping our customers, communities and colleagues safe

**Focus group findings:** In the current climate, some respondents confused this with a response to COVID-19. Others thought this theme was about responding to gas leaks, maintaining gas pipes and taking responsibility for supporting those in need. The use of the words 'risk based approach' was unsettling for some.

## What does this mean to customers?

Again, customers have a good grasp of this theme, understanding that it relates to keeping the gas network safe for all, preventing and fixing gas leaks and explosions, keeping the supply reliable, ensuring staff are sufficiently trained, and working to a high standard of health & safety. Like in the focus groups, several people also mentioned adhering to additional safety rules specific to the pandemic.

“Making sure that gas pipes etc. are safe and all working practices are safe”

“Less gas leaks, quicker detection”

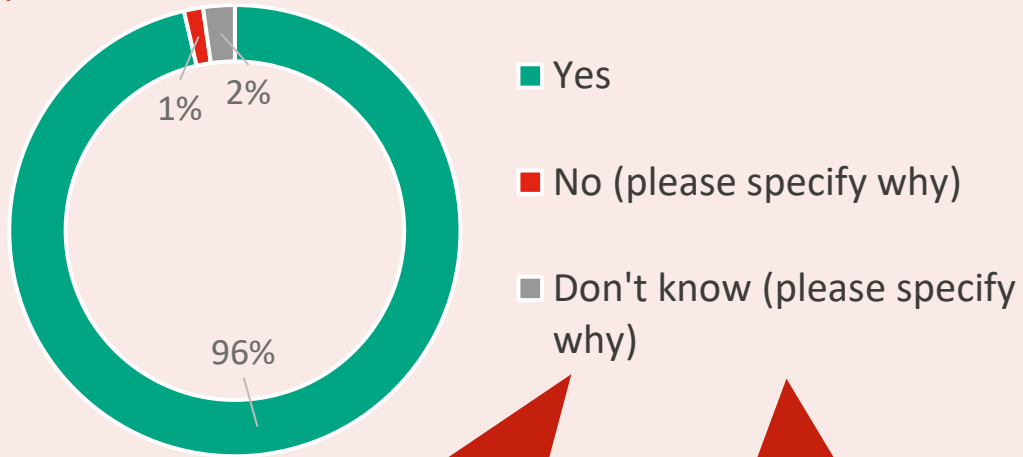
“Safe from dangers involved with gas, and safe in terms of COVID procedures”





# Keeping our customers, communities and colleagues safe

Does WWU's description cover what customers would expect to be included under this theme?



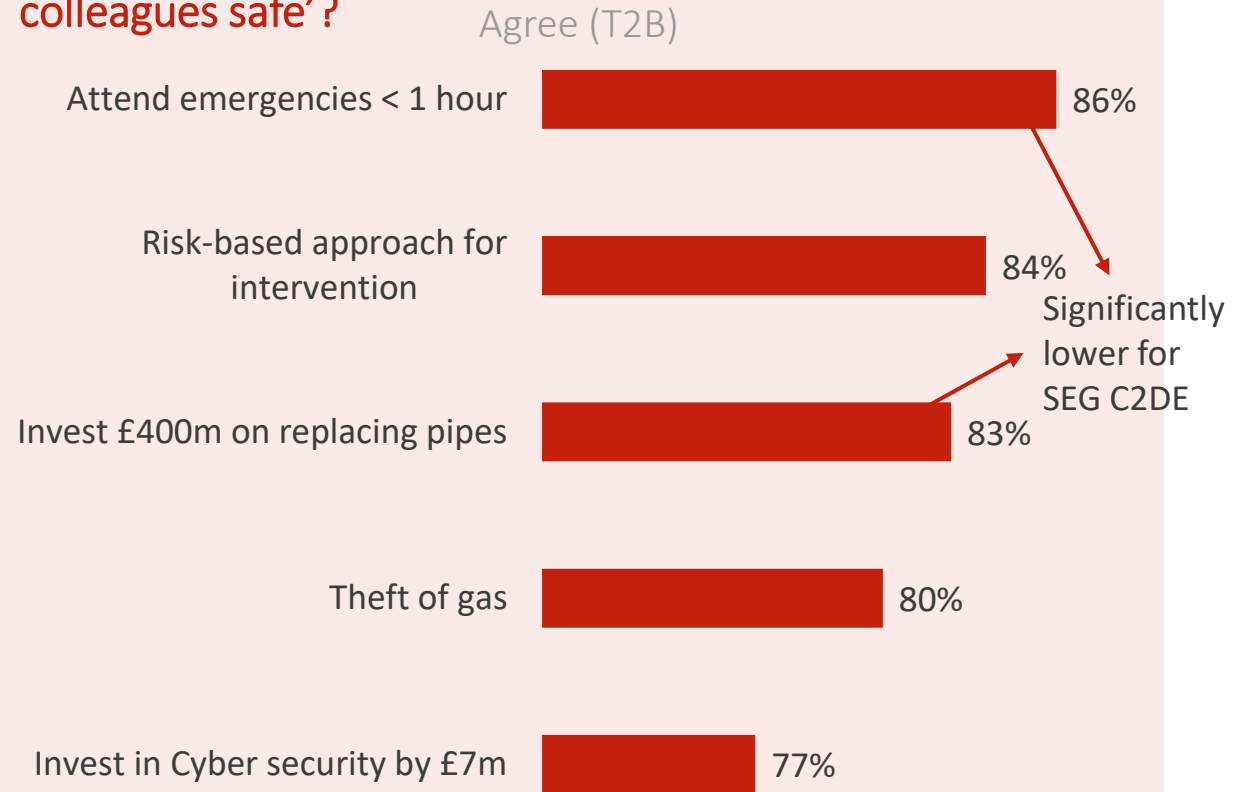
"It is more detailed than what I thought. I thought it was a generalised message but it actually has something to do with carbon monoxide and building awareness."

"Making sure that all pipes don't leak and all the work is carried out to a great standard."

Range 'yes' : 80% -96%

*"Through our day to day planned operational activities which take a risk-based approach to keep people safe, responding rapidly to emergencies, our approach to cyber security and building awareness of carbon monoxide safety particularly with vulnerable groups and with the support of our partners"*

To what extent do you agree the following statements describe WWU 'keeping our customers, communities and colleagues safe'?



Q13b WWU describes its role in 'keeping our customers, communities and colleagues safe' as follows: "Through our day to day planned operational activities which take a risk-based approach to keep people safe, responding rapidly to emergencies, our approach to cyber security and building awareness of carbon monoxide safety particularly with vulnerable groups and with the support of our partners" Does this description cover what you would expect to be included under this theme? Base (All): 804. Q13c To what extent do you think the following statements describe WWU 'keeping our customers, communities and colleagues safe'? Please use a scale from 1 to 5, where 1 is 'Strongly disagree' and 5 is 'Strongly Agree'. Base (All): 804.

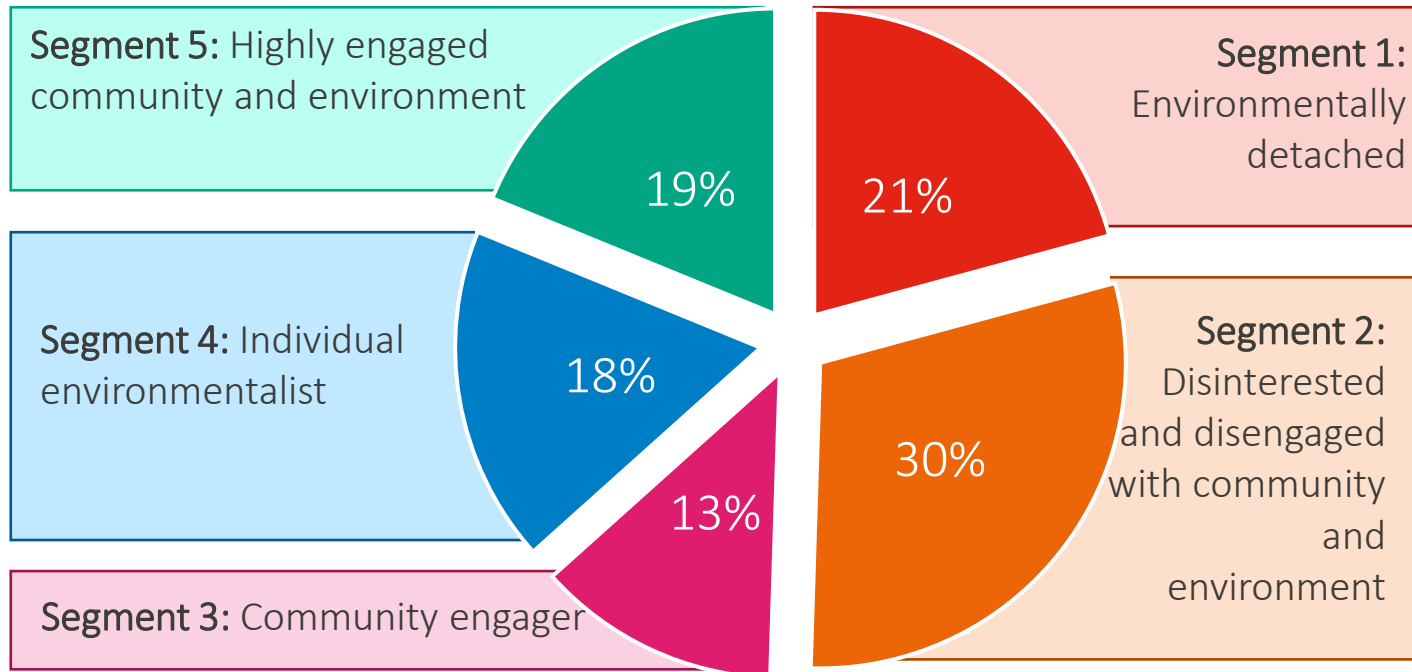
Segmentation

**IMPACT**

FROM INSIGHT TO INFLUENCE

# Segment Sizes

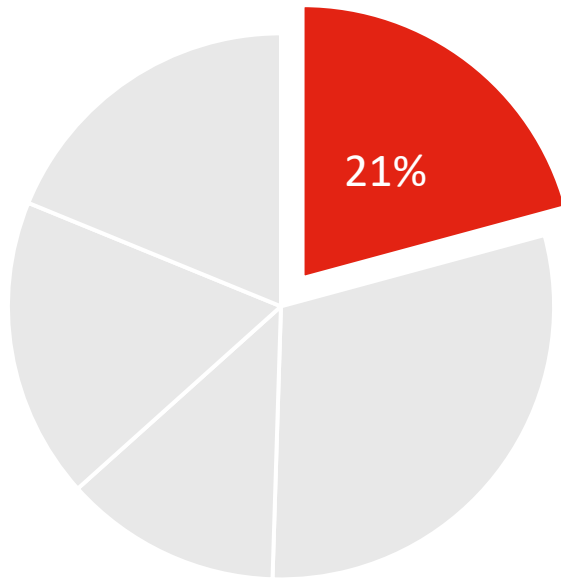
We have identified 5 new segments based on a new set of community statements.



Segmentation was based on both environmental and community attitudes expressed by participants on agreement scale.

We then used demographics to identify how these segments differ.

# SEGMENT 1 - Environmentally detached



## Priorities?

The environment is a low priority for them.

More likely to agree:

- There is too much concern with the environment (34% v 12%)
- That reducing carbon footprint is not important to them (43% v 10%).

## Key Attitudes?

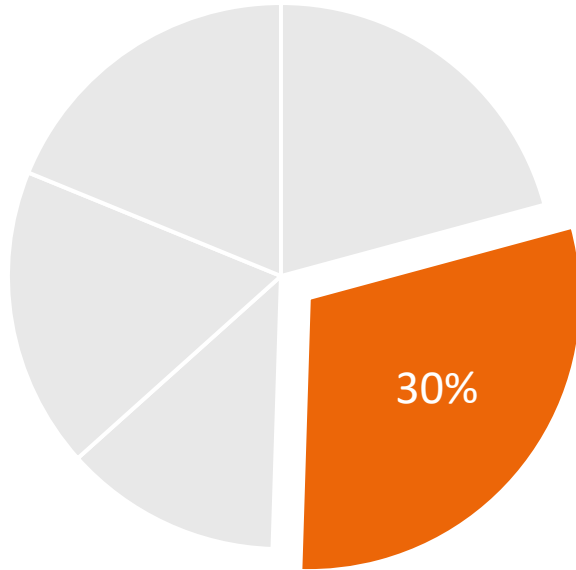
General:

- Slightly less likely to know what Net Zero is (46% v 51%)
- Pre-COVID and currently, less likely to be concerned about climate change, and local community and economy

## Who are they? N= 165

- Much greater proportion of males (61% v 48%)
- Proportionally fewer in younger age bands (18-34 years: 22% v 35%)
- Slightly higher proportions of C2DE SEG (46% v 37%)

## SEGMENT 2 – Disinterested and disengaged with community and environment



### Priorities?

This segment just has no interest or engagement. They are disinterested and disengaged with community and environment.

More likely to agree:

- I need to put my problems above those of other people (29% v 23%)

Less likely to agree:

- They will pay more for environmentally friendly products (27% vs 46%)

### Key Attitudes?

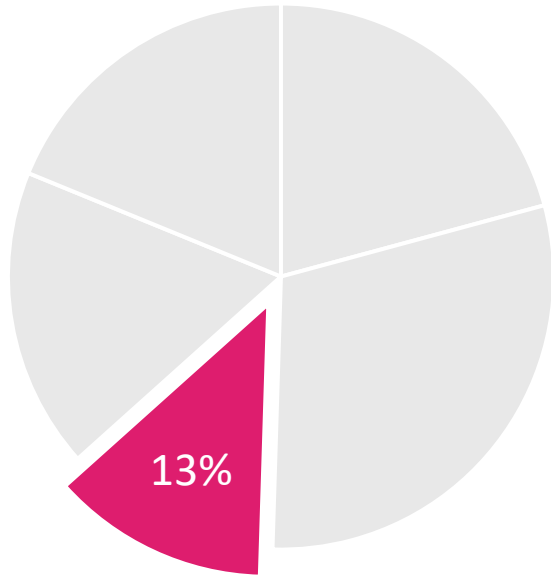
General:

- Less likely to know about WWU (40% v 47%)
- More likely to be concerned with their local economy over and above anything else

### Who are they? N= 238

- Slightly less likely to rent (25% v 29%)
- Slightly higher proportion suburban (62% v 56%)

# SEGMENT 3 – Community engager



## Priorities?

Community is a high priority for this segment, but they are neutral about the environment.

More likely to agree:

- A sense of community is important to me (92% v 56%)
- I actively look to take part in community events and projects (58% v 27%)
- Helping others is very rewarding (100% v 84%)

Less likely to agree:

- I need to put my problems above those of other people (9% v 23%)
- I am prepared to pay more for environmentally friendly products (29% v 46%)

## Key Attitudes?

General:

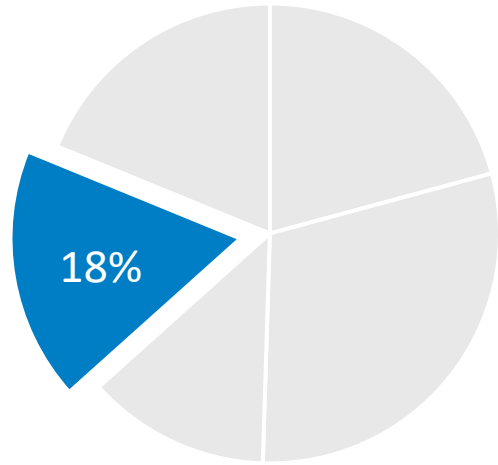
- More likely to know about WWU (50% v 47%)
- More likely to be concerned with their local community pre-COVID

## Who are they? N=105

- Proportionally more rural (50% v 32%)
- Greater proportions of over 65 years (28% v 19%)
- Proportionally more likely to live in a house (81% v 74%)
- Slightly higher proportion of fuel poor (7% v 4%)



# SEGMENT 4 – Individual environmentalist



## Priorities?

Community is a low / medium priority, but the environment is a high priority.

More likely to:

- Believe that reducing carbon footprint is important (99% vs 63%)
- Agree there isn't enough concern about the environment (98% vs 69%)

## Key Attitudes?

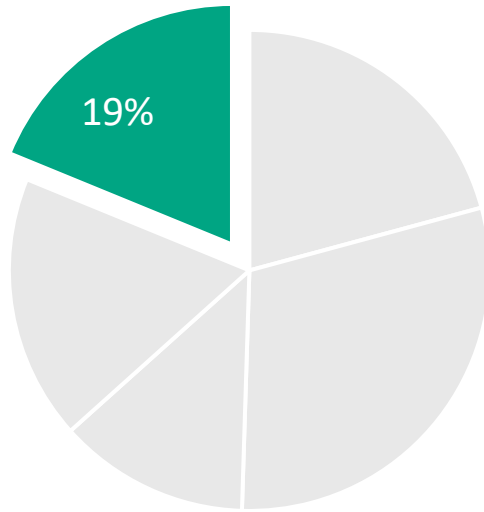
General

- More likely to know about Net Zero (60% v 51%)
- Most likely to state they were concerned about climate change pre-COVID
- Most likely to state they were concerned about their job security currently

## Who are they? N= 146

- Higher proportion of 18-34 years (40% v 35%)
- Slightly higher proportion of SEG ABC1 (67% v 63%)
- Slightly higher proportion live in a high rise flat (3% v 1%)

# SEGMENT 5 – Highly engaged in community and environment



## Key Attitudes?

- All rate reduction of carbon footprint as important and helping others as important.

Likely to agree:

- Most likely to rate a sense of community as important to them (96% v 56%)
- Actively look to take part in community events and projects (63% v 27%)
- They are worried about pollution and congestion (99% v 67%)
- Reducing carbon footprint is important to them (100% v 63%)

## Priorities?

General:

- More knowledgeable of WWU (56% v 47%)
- More likely to be satisfied with the service provided by WWU (73% vs 59%)

Agree:

- More likely to be concerned about climate change before pandemic.
- Currently concerned about 'climate change, local community and local economy'

## Who are they? N=150

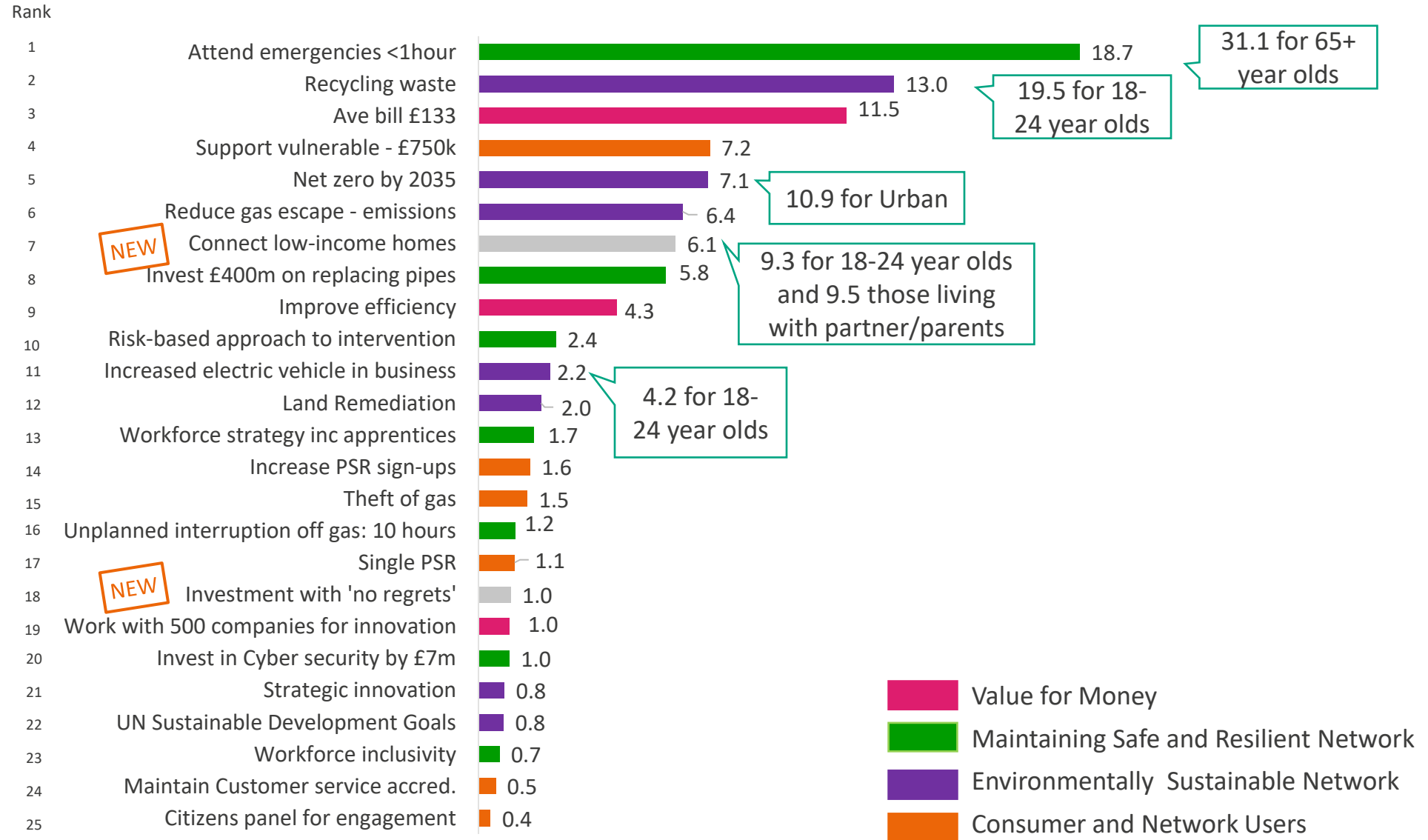
- Slightly higher proportion Urban (19% v 11%)
- Higher proportion of females (66% v 52%)
- Higher proportion of 18-24 years (50% v 35%)
- Slightly lower proportion of SEG DE (16% v 22%)
- Much higher proportion of renters (40% v 29%)
- Slightly higher proportion live in a flat (15% v 11%)

The commitments

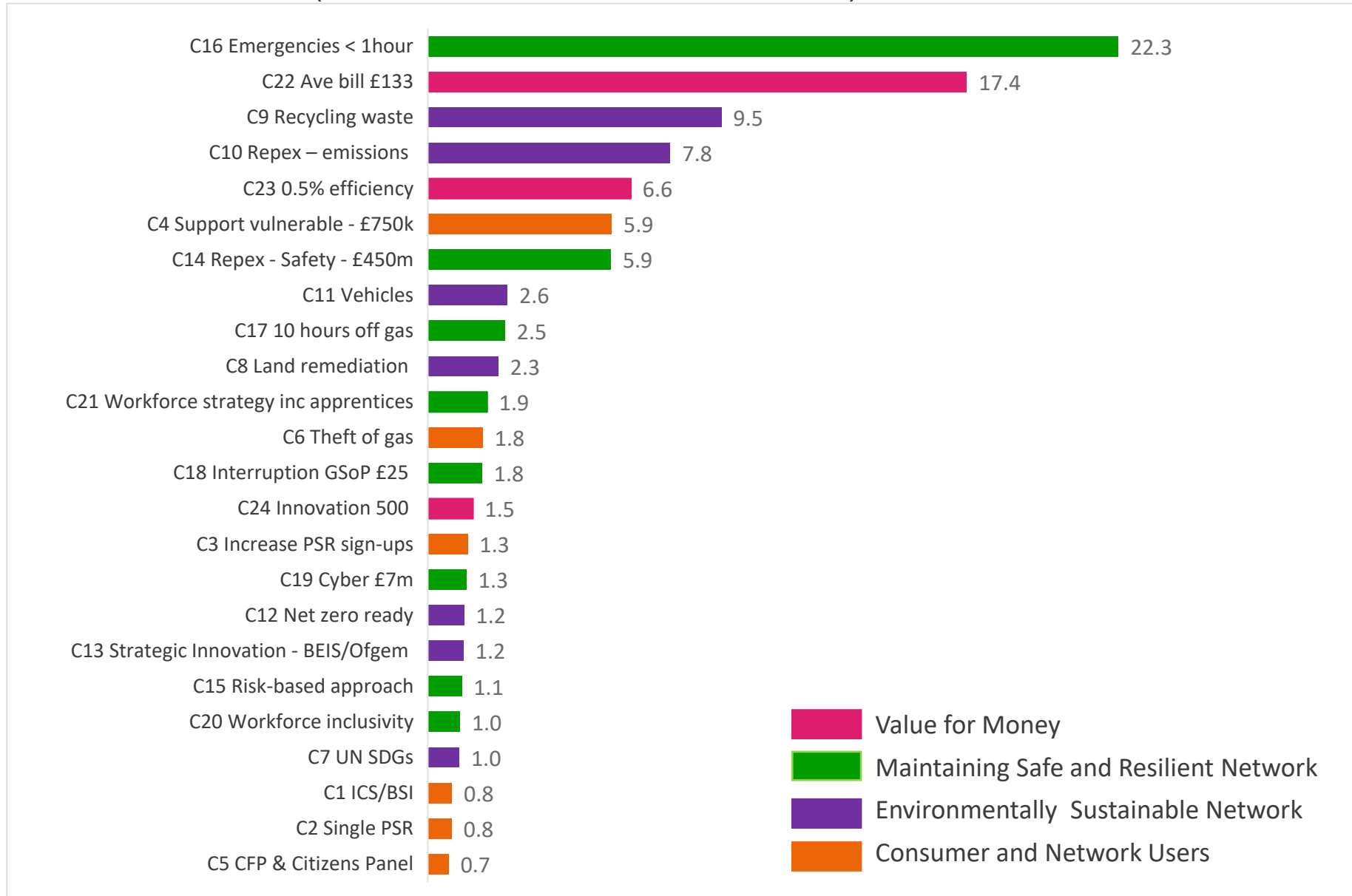
**IMPACT**

FROM INSIGHT TO INFLUENCE

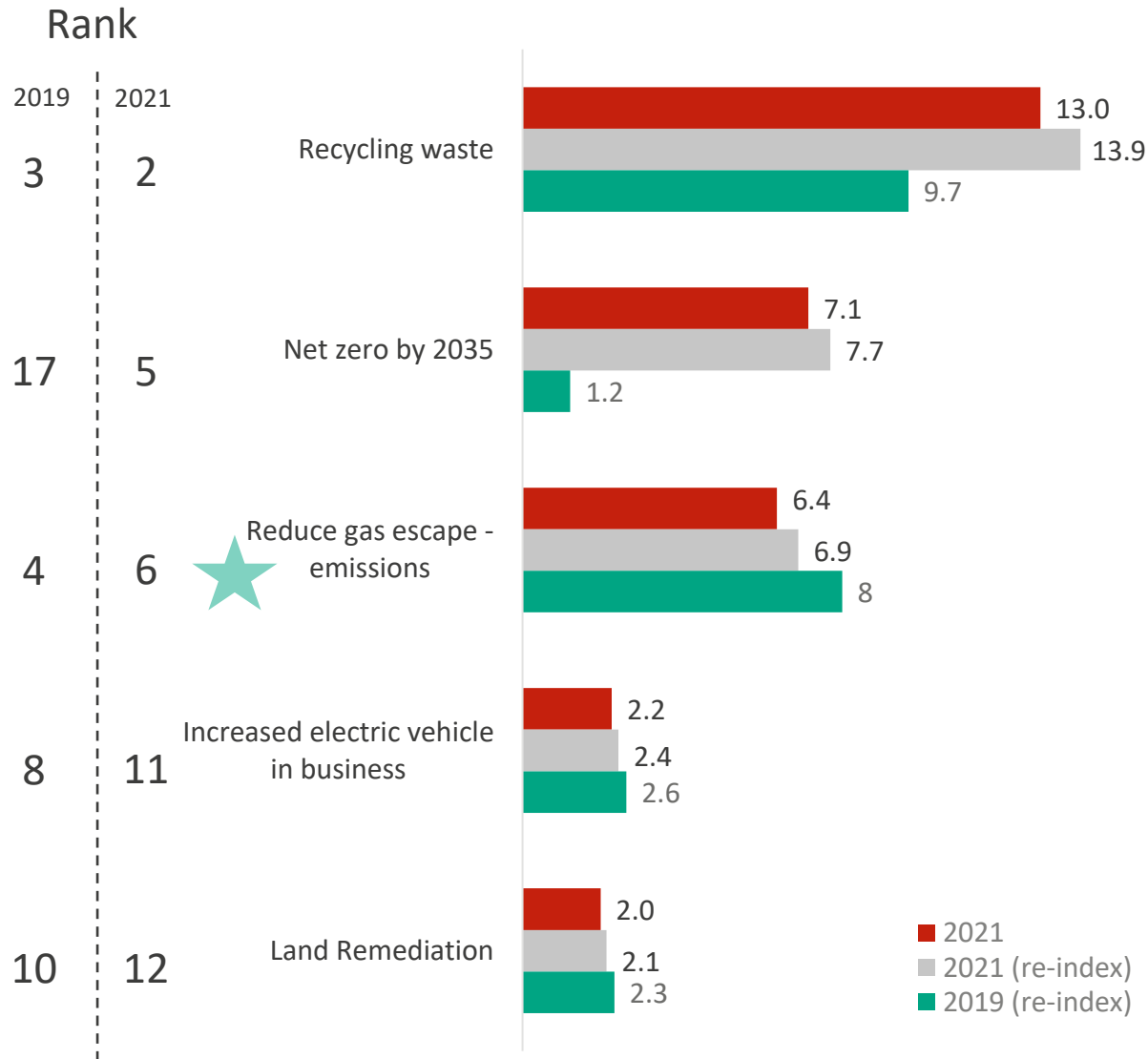
# Importance of commitments (from 2021 max diff results)



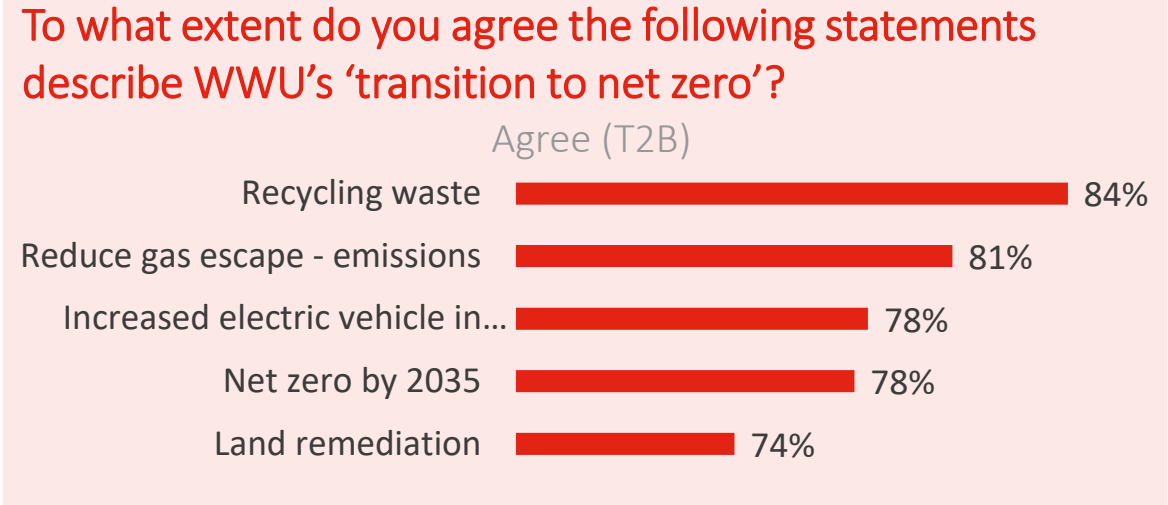
# Importance of commitments (from 2019 max diff results)



# Transition to net zero




Max Diff (804). Re-index score offers a proxy allowing for comparisons with this year. Rank from non-indexed scores.



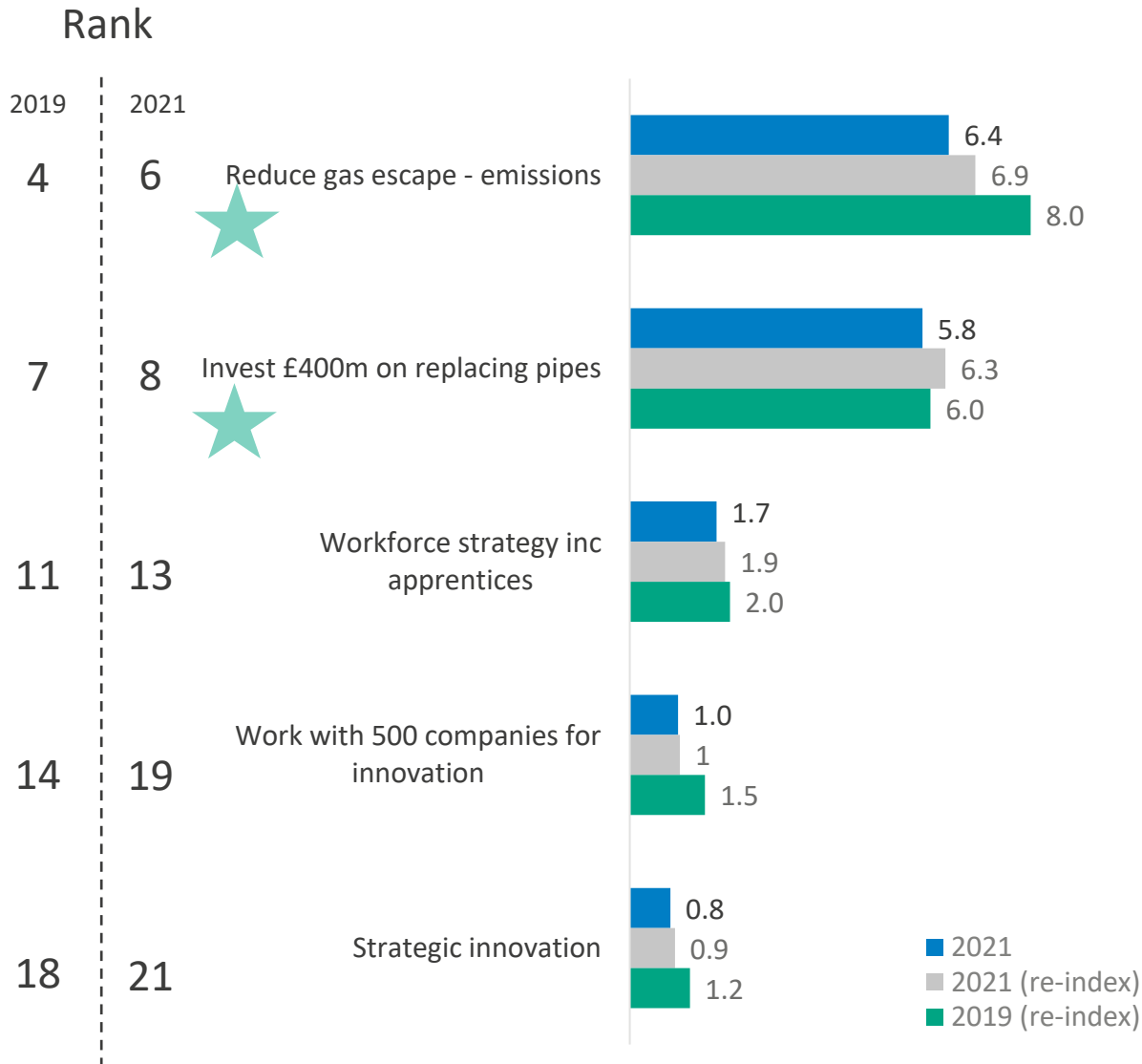
### Segments

- Net Zero is the commitment which is the most divisive amongst the segments as low priority for the environment decreases the importance significantly
- For **Individual Environmentalists**, recycling waste is ranked top priority with Net Zero coming in third rank
- Land remediation remains consistent across the segments
- Increased EVs in business decreases in importance for those **Environmentally Detached**

 =commitment fits into 2 themes

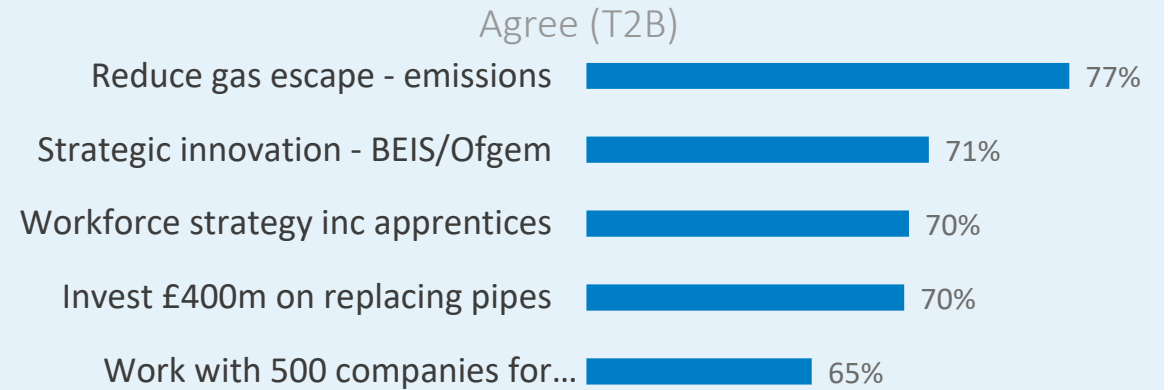


# Powering the green recovery



Max Diff (804). Re-index score offers a proxy allowing for comparisons with this year. Rank from non-indexed scores.

## To what extent do you agree the following statements describe WWU 'powering the green recovery'?

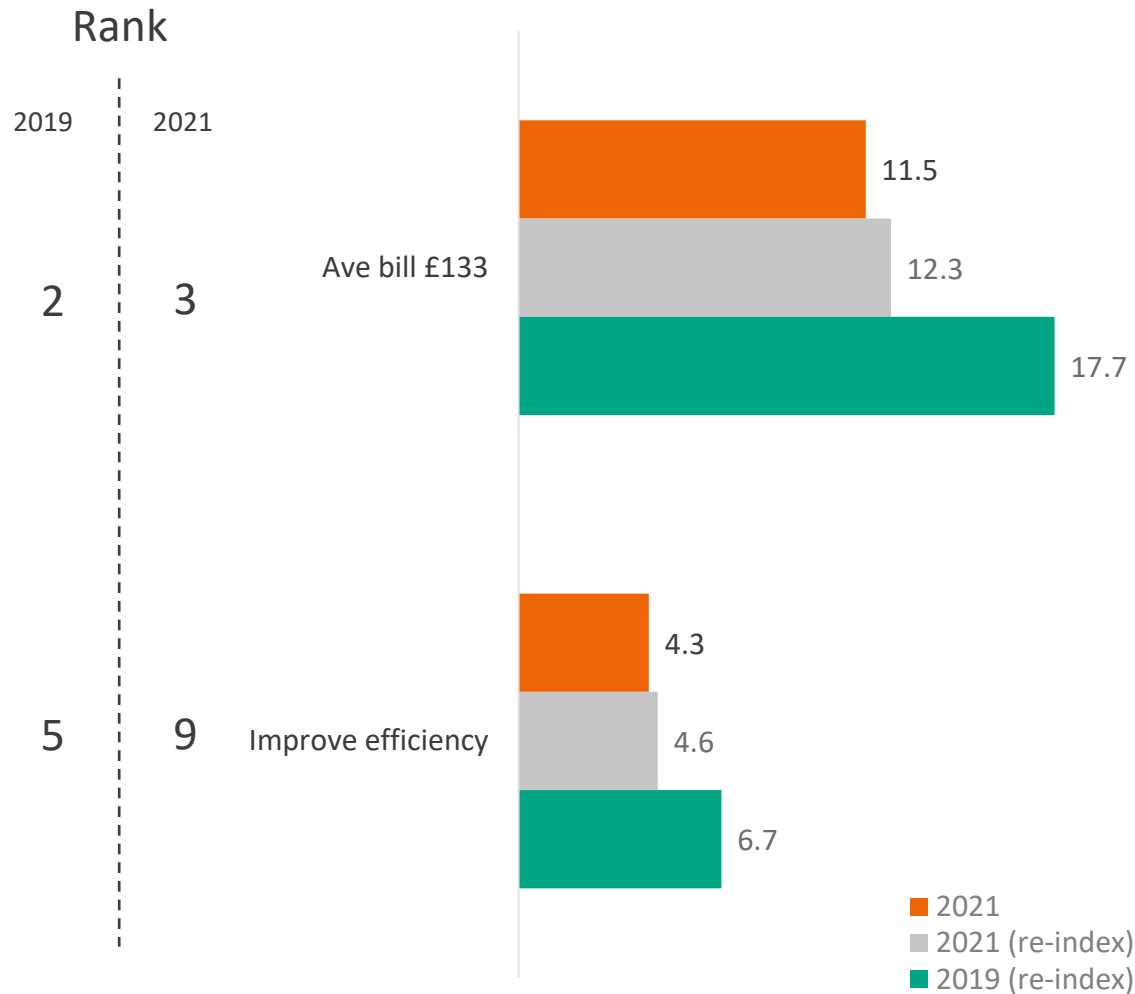


### Segments

- Importance increases for investing £400m in pipe replacement for those who are **Environmentally detached**
- **Community Engagers** are more likely to place less importance in working with companies for innovation or strategic innovation
- Importance on workforce strategy remained consistent across all segments

★ =commitment fits into 2 themes

# Keeping bills affordable



Max Diff (804). Re-index score offers a proxy allowing for comparisons with this year. Rank from non-indexed scores.

To what extent do you agree the following statements describe WWU 'keeping bills affordable'?

Agree (T2B)

Ave bill £133



Improve efficiency



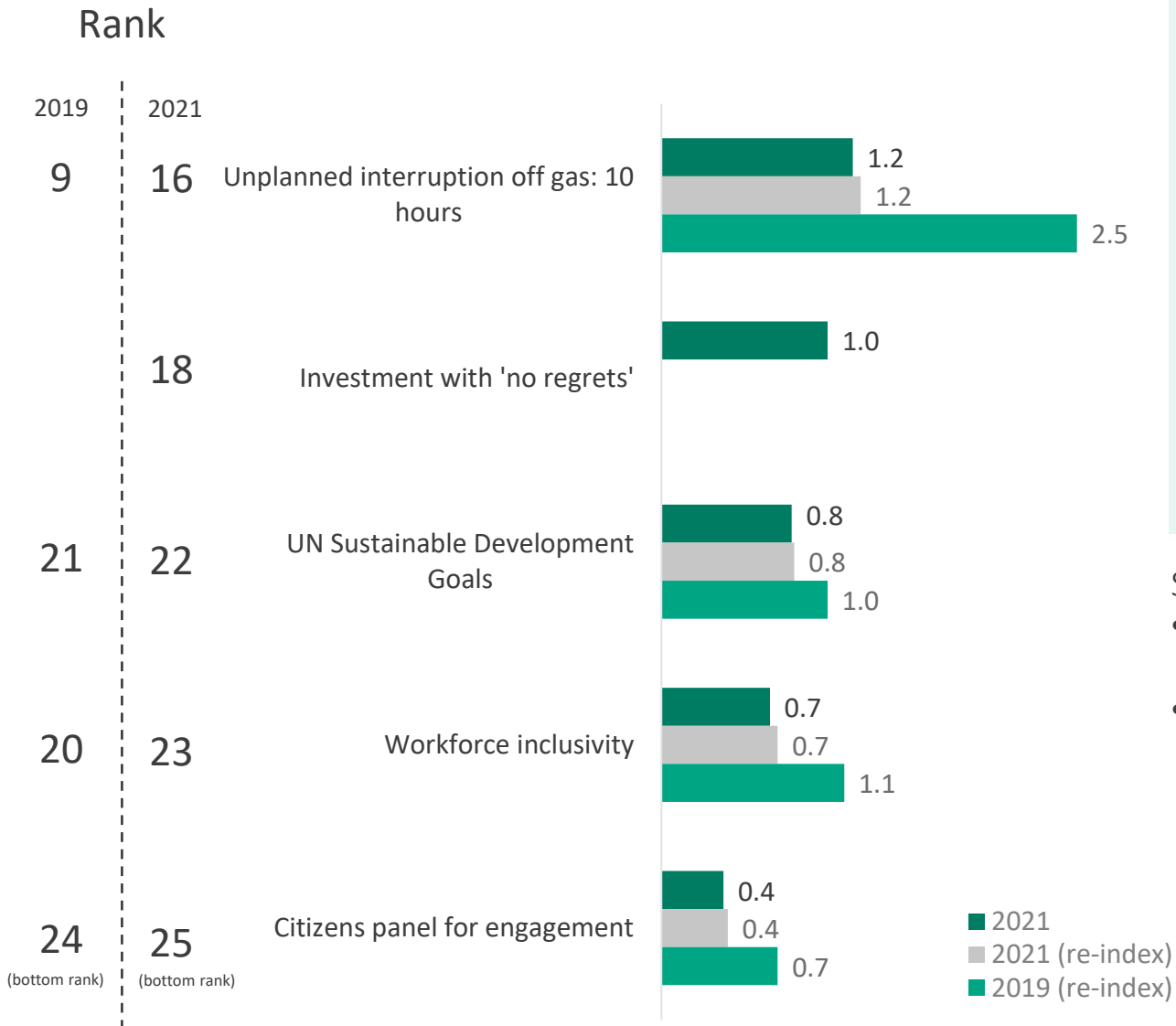
## Segments

- **Community Engagers** rate ave bill £133 the second highest commitment and likely to place more importance on improved efficiency
- However those **Highly engaged with both the Environment and Community** place less importance on ave bill £133 at just 6.3 compared to 11.5 total.
- **Individual environmentalists** are particularly likely to rate both commitments slightly more importance, ranking 2 and 8 respectively.



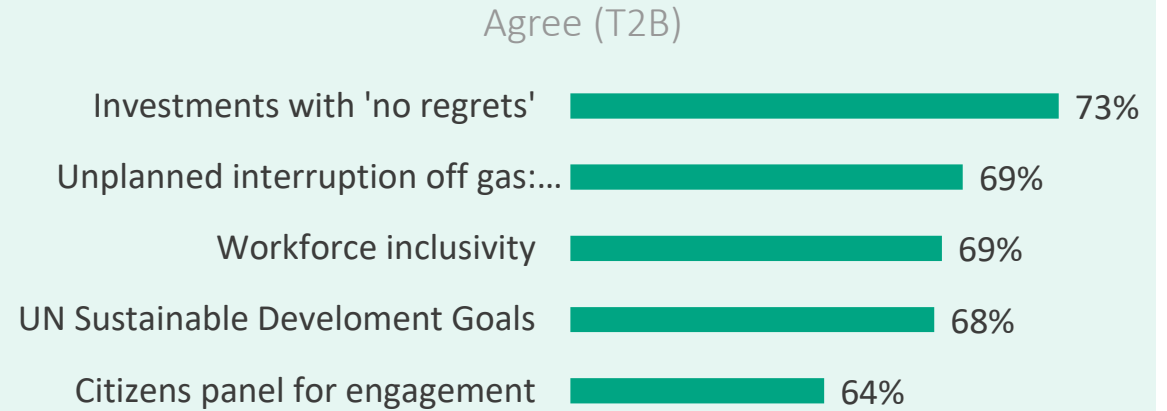
=commitment fits into 2 themes

# Sustainable business




Max Diff (804). Re-index score offers a proxy allowing for comparisons with this year. Rank from non-indexed scores.

## To what extent do you agree the following statements describe WWU being a 'sustainable business'?

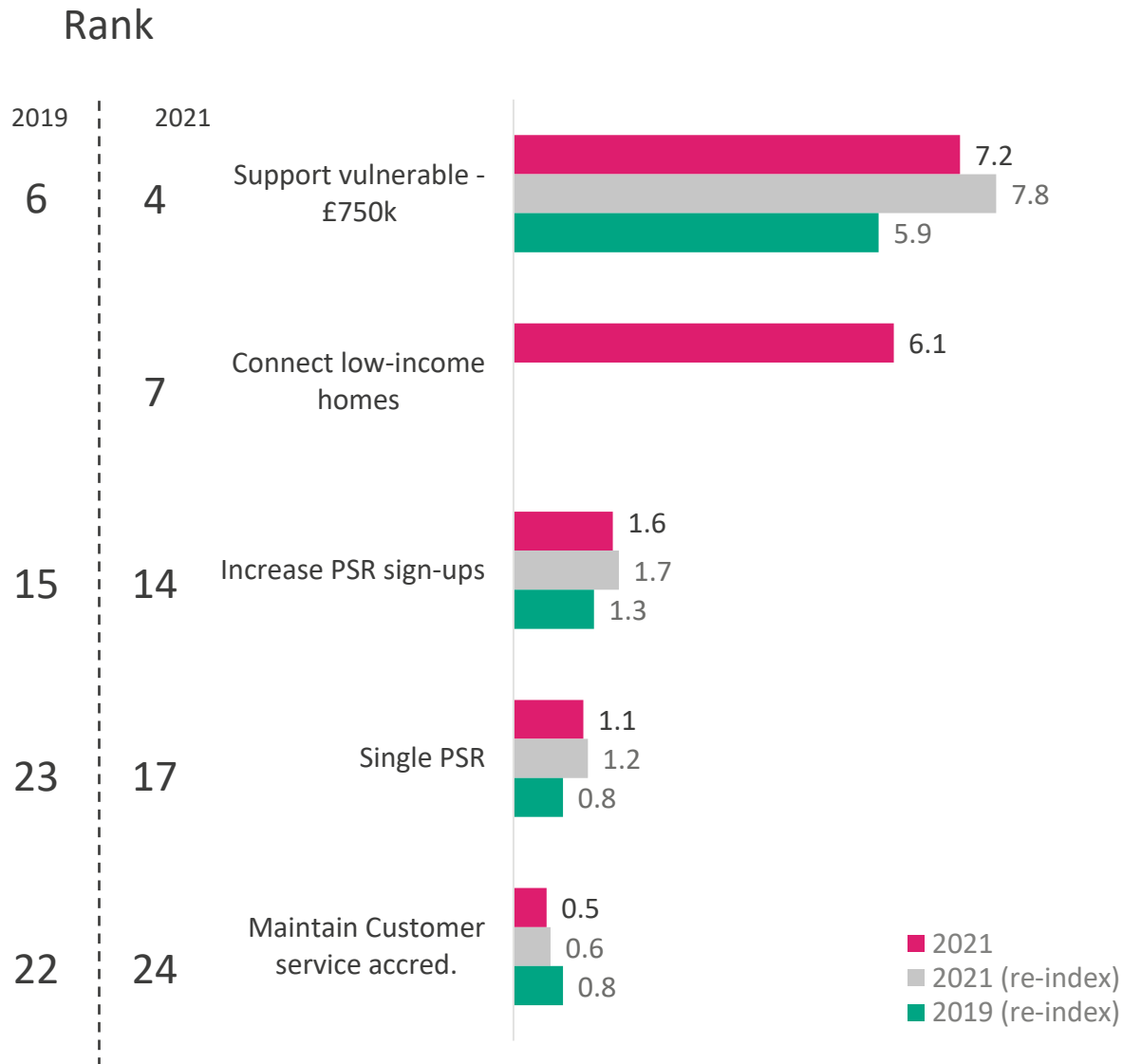


### Segments

- **Individual environmentalists** are more likely to place more importance on investment with no regrets and UN DGs.
- **Those engaged with the community and environment** placed less importance on unplanned gas interruptions.

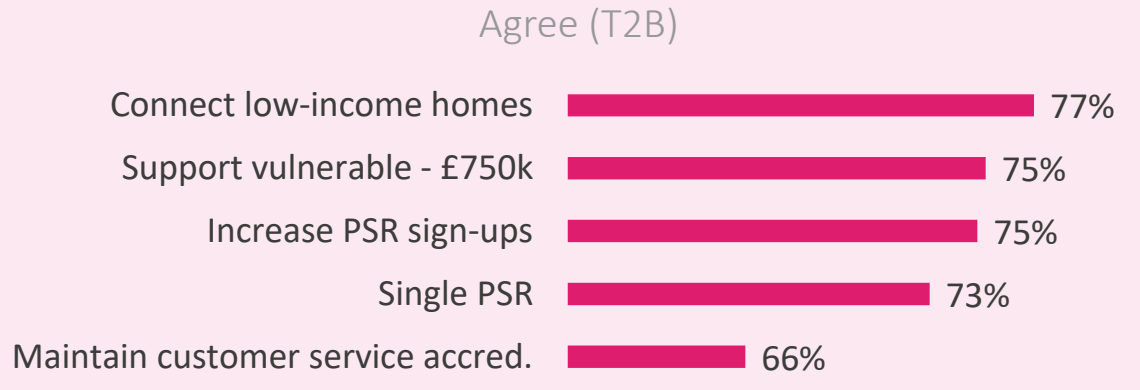
 =commitment fits into 2 themes

# Supporting those in need




Max Diff (804). Re-index score offers a proxy allowing for comparisons with this year. Rank from non-indexed scores.

## To what extent do you agree the following statements describe WWU 'supporting those most in need'?

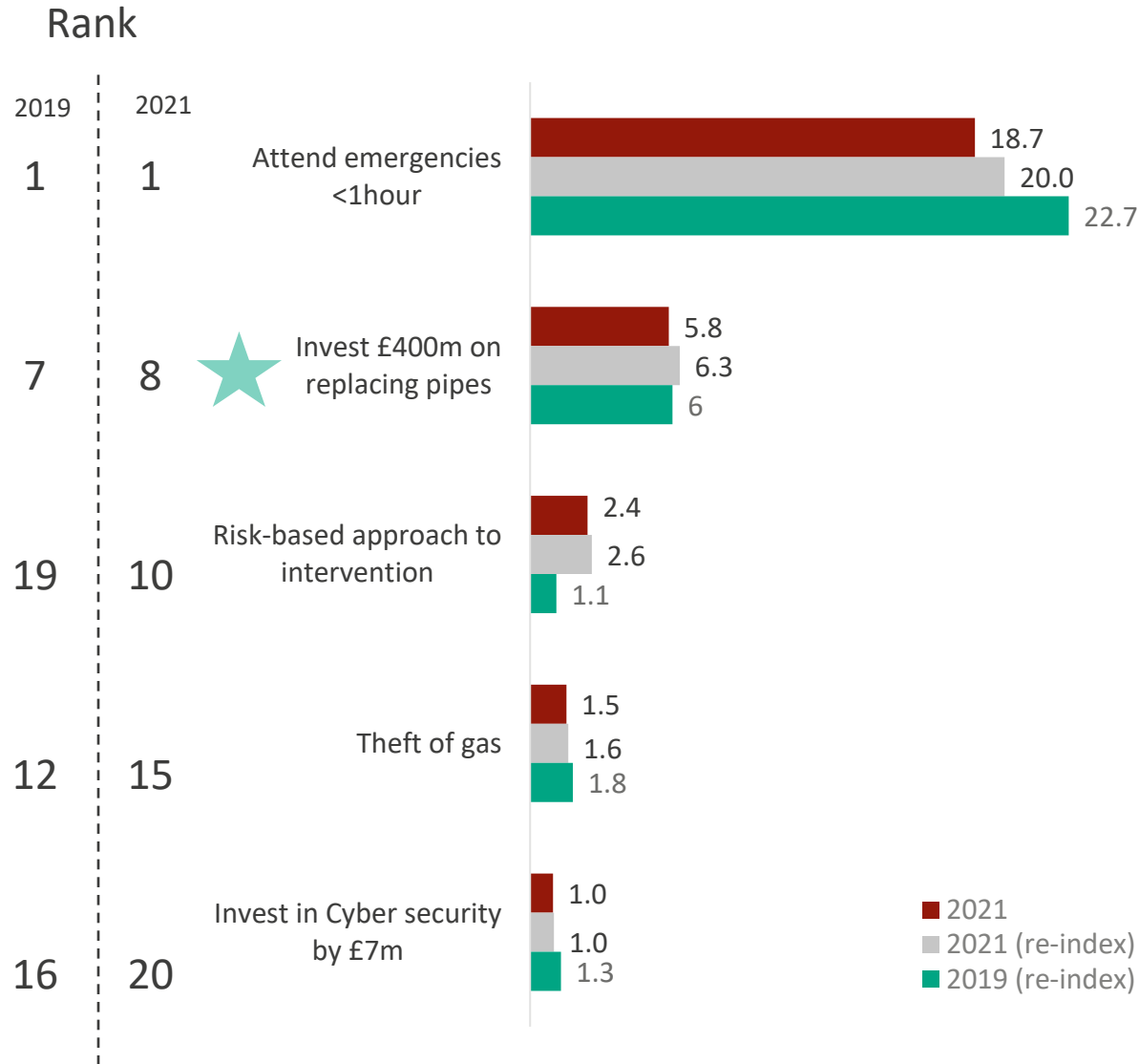


### Segments

- Those **Environmentally detached** are more likely to place importance on increasing PSR sign ups
- **Individual Environmentalists** are less likely to place importance on all statements are rank them -1 vs total.
- **Highly engaged with Community and Environment** place more importance on support for vulnerable, connecting low-income homes and single PSR.
- Maintaining customer service accred. remains consistent across all segments.

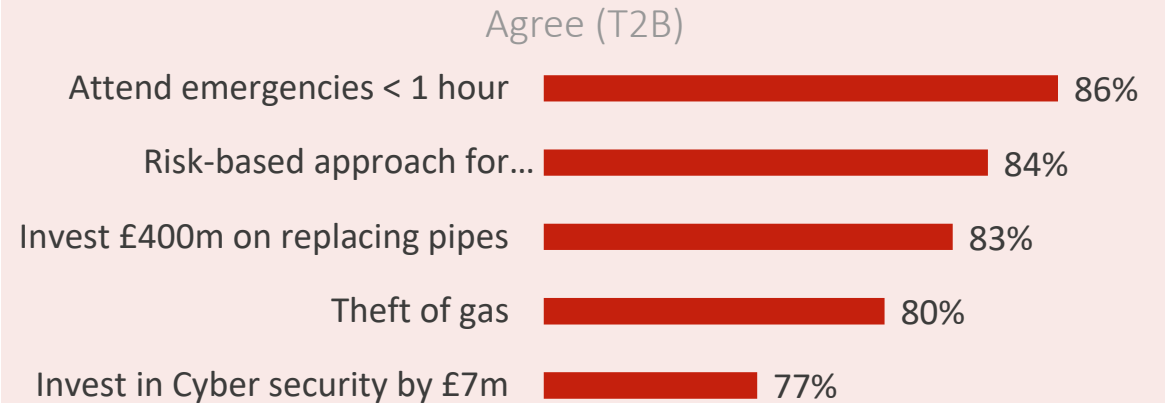
 =commitment fits into 2 themes

# Keeping our customers, communities and colleagues safe




Max Diff (804). Re-index score offers a proxy allowing for comparisons with this year. Rank from non-indexed scores.

## To what extent do you agree the following statements describe WWU 'keeping our customers, communities and colleagues safe'?



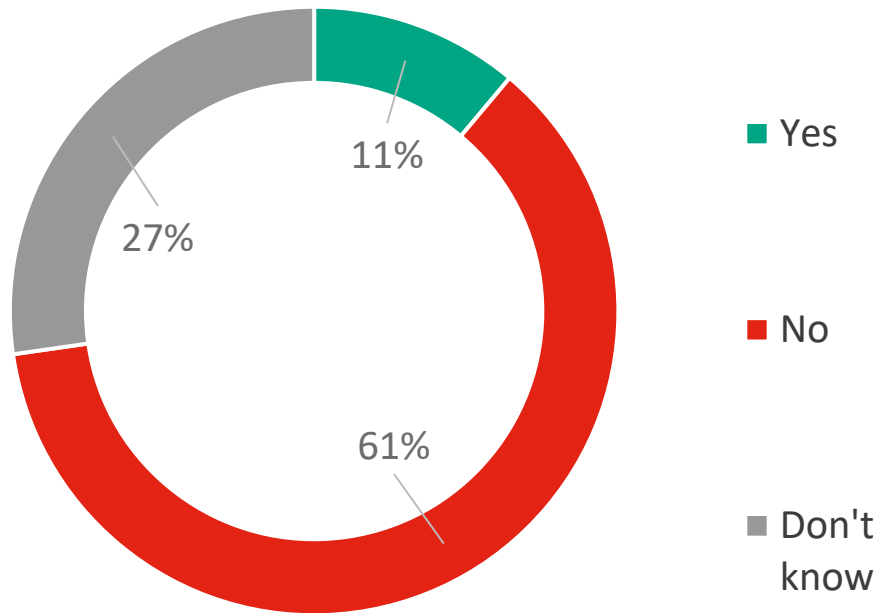
### Segments

- Those **Environmentally detached** placed more importance on attending gas emergencies under an hour, replacing pipes, theft of gas and cyber security.
- All other segments placed similar importance on these commitments

 =commitment fits into 2 themes

# Any other priorities for WWU

Is there anything else that you think WWU should be prioritising?



“Improving purchasing contracts to use items that will use less energy and create less waste. However do not replace items like vehicles whilst they are still in good efficient working order. Insulate your premises to reduce energy requirements”

“Link to welsh govt future generations act promote/support access to welsh language change ownership model in wales and convert to nfp model like glas cymru/welsh water”

“Transitioning to a hydrogen supply in place of methane, in the same way that we transitioned to natural gas in the 1970’s”



COVID-19

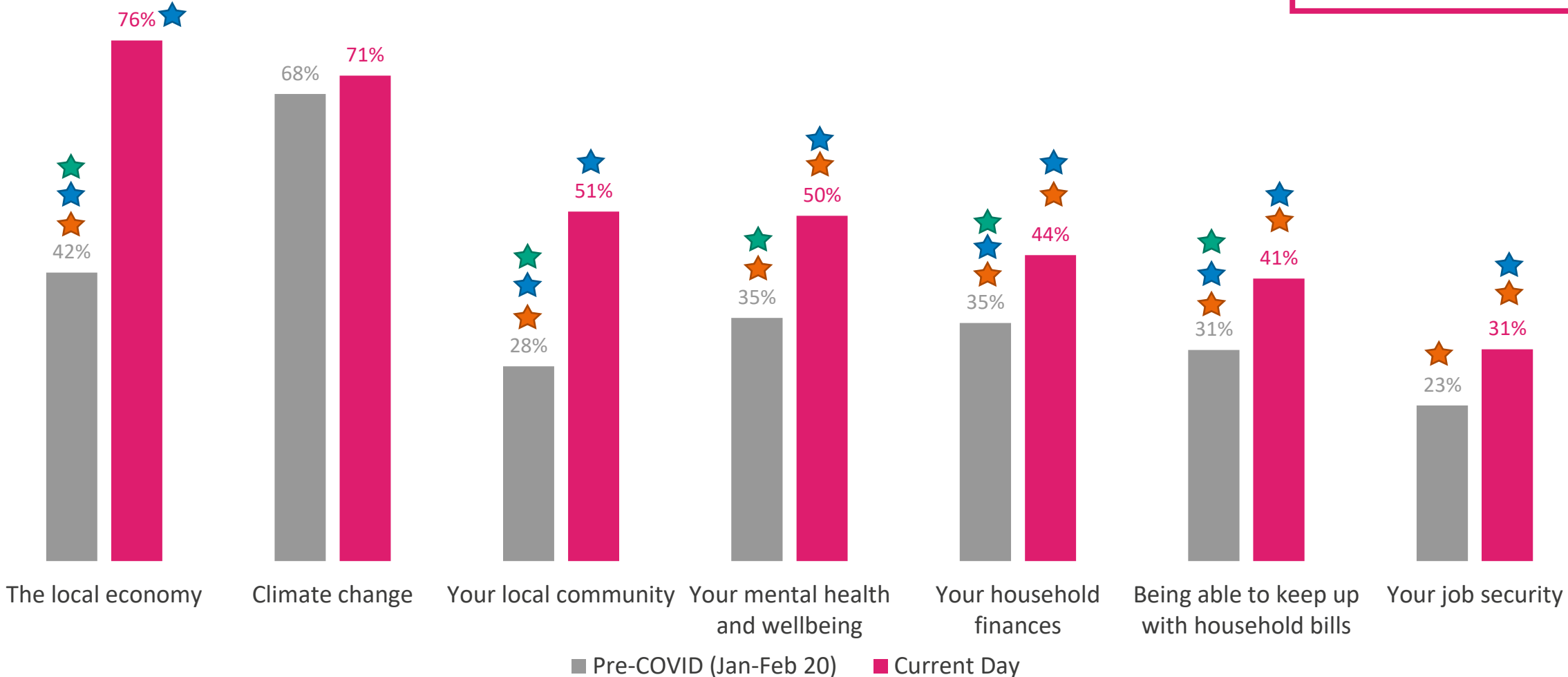
**IMPACT**

FROM INSIGHT TO INFLUENCE

# Attitudinal Statements – Pre-COVID and Current Day

How concerned were/are you, if at all, about each of the following?  
(T2B; very / fairly concerned)

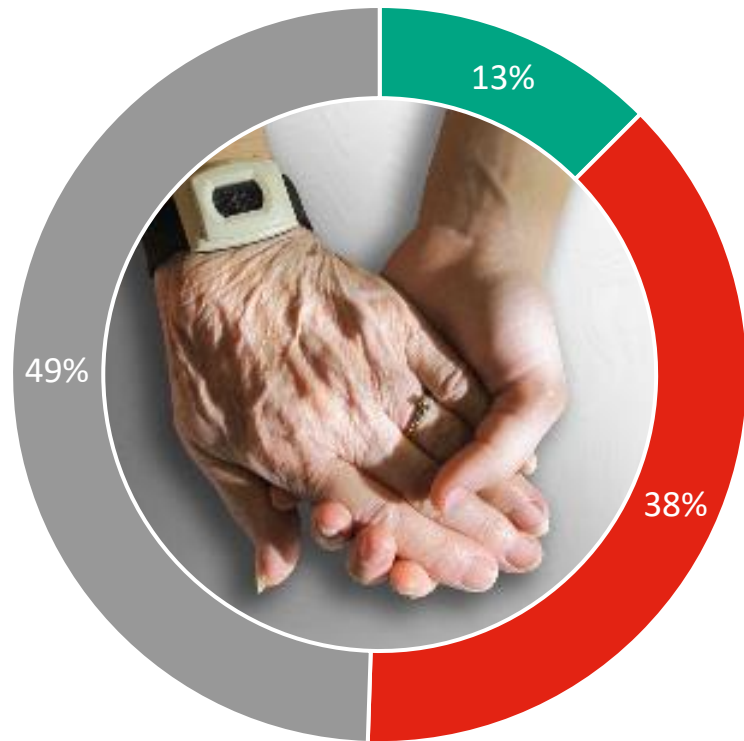
Significantly higher for:  
★ 18-34 year olds  
★ Women  
★ Vulnerable customers



Q15 We'd now like you to think back to January and February of 2020. Base (All): 804. Back then, how concerned were you, if at all, about each of the following?  
 Q16 And now thinking about the situation today, how concerned are you, if at all, about each of the following? Base (All): 804. Q17 Do you think WWU should be doing more to support their customers during the COVID-19 pandemic? Base (All): 804.

# Support from WWU

Do you think WWU should be doing more to support their customers during the COVID-19 pandemic?



■ Yes (please specify)   ■ No   ■ Don't know

“Committing to not cutting off those on pay meters during the pandemic”

“Could make phone calls to check if they need support to elderly and vulnerable”

“Take less money from people who have lost their income or been on furlough”

“I'm pretty sure they are really, but this is not evident.”

# THANK YOU

EVELIN ROBERTS  
SENIOR RESEARCH EXECUTIVE  
Evelin.Roberts@impactmr.com

DAWN MULVEY  
CLIENT DIRECTOR  
Dawn.Mulvey@impactmr.com

Office: 44 (0) 1932 226793

Impact Research Ltd, 3 The Quintet, Churchfield Road, Walton-on-Thames,  
KT12 2TZ, United Kingdom

All projects are carried out in compliance with the ISO 20252 international  
standard for market, opinion and social research and GDPR.

# IMPACT

FROM INSIGHT TO INFLUENCE

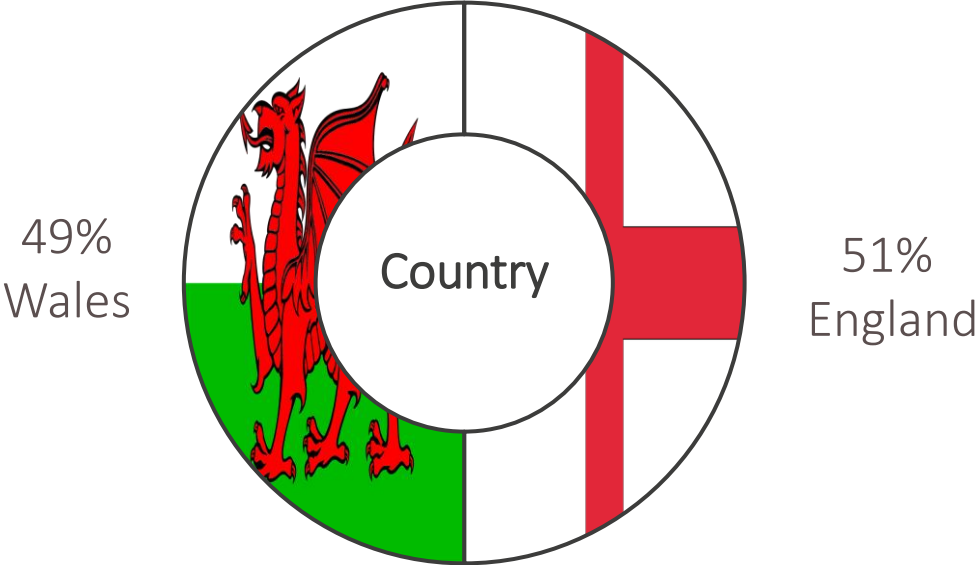


APPENDIX

**IMPACT**

FROM INSIGHT TO INFLUENCE

804 domestic customers from Wales and England completed the questionnaire

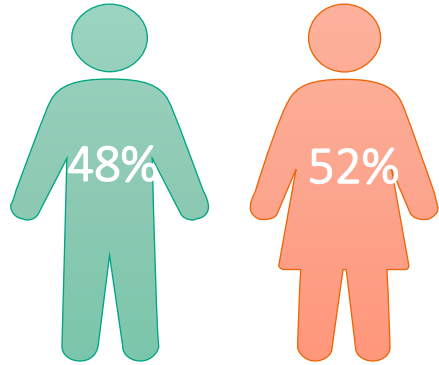


S9b. Please specify which area live in. Base: All (804)

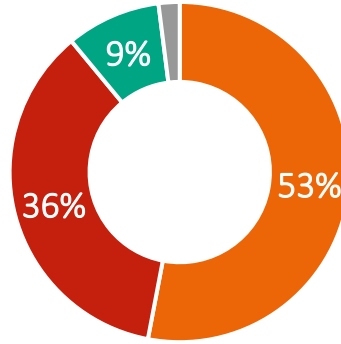


# DEMOGRAPHICS

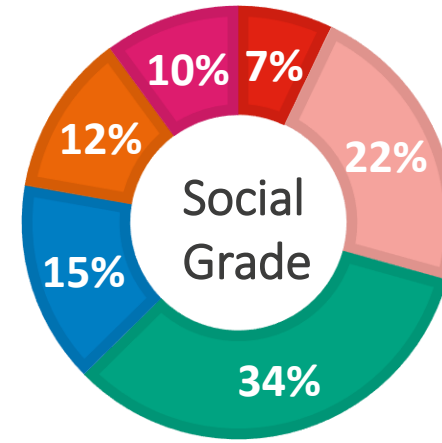
## Gender



# Bill Payment Responsibility



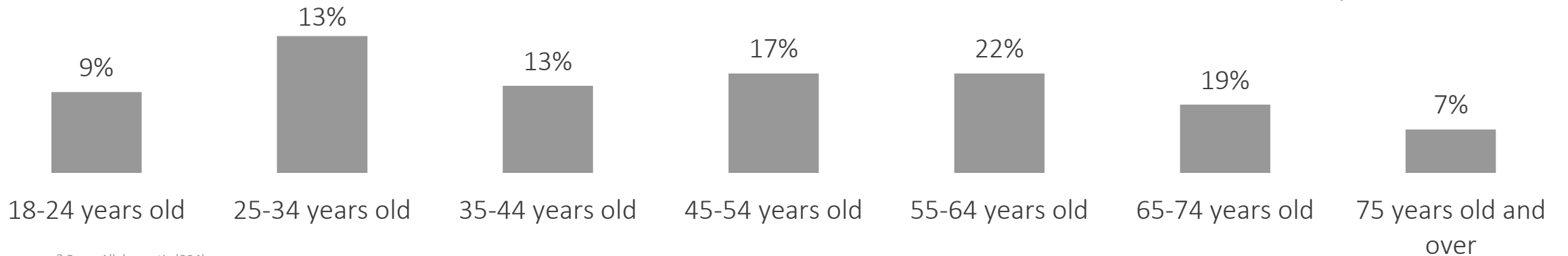
- Complete responsibility for payment
- Share responsibility for payment with others in household
- No responsibility for payment
- Other (e.g. included in my rent)



- A: High Managerial, admin or professional
- B: Intermediate managerial, admin or professional
- C1: Supervisory, clerical and junior managerial, admin or professional
- C2: Skilled manual workers
- D: Semi and unskilled manual workers
- E: State pensioners, casual/lowest grade workers, unemployed with state pension

## Total

## Age



S7 What is your age? Base: All domestic (804)

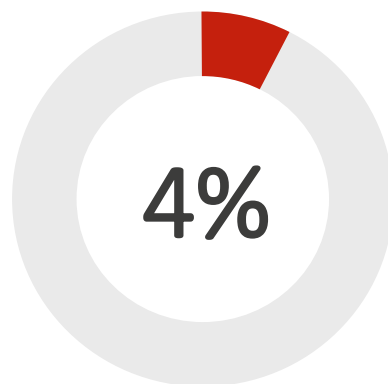
S8 Are you the person responsible for paying the utility bills (such as water, electricity and gas) in your household? Base: All Domestic (804).

D1. what is your gender? below. Base: All domestic (804)

D2. Which ONE of the following categories best describes the employment status of the Chief Income Earner (CIE) in your household? Base: All domestic (804)

# THOSE CLASSIFIED AS VULNERABLE

Those classified as fuel poor

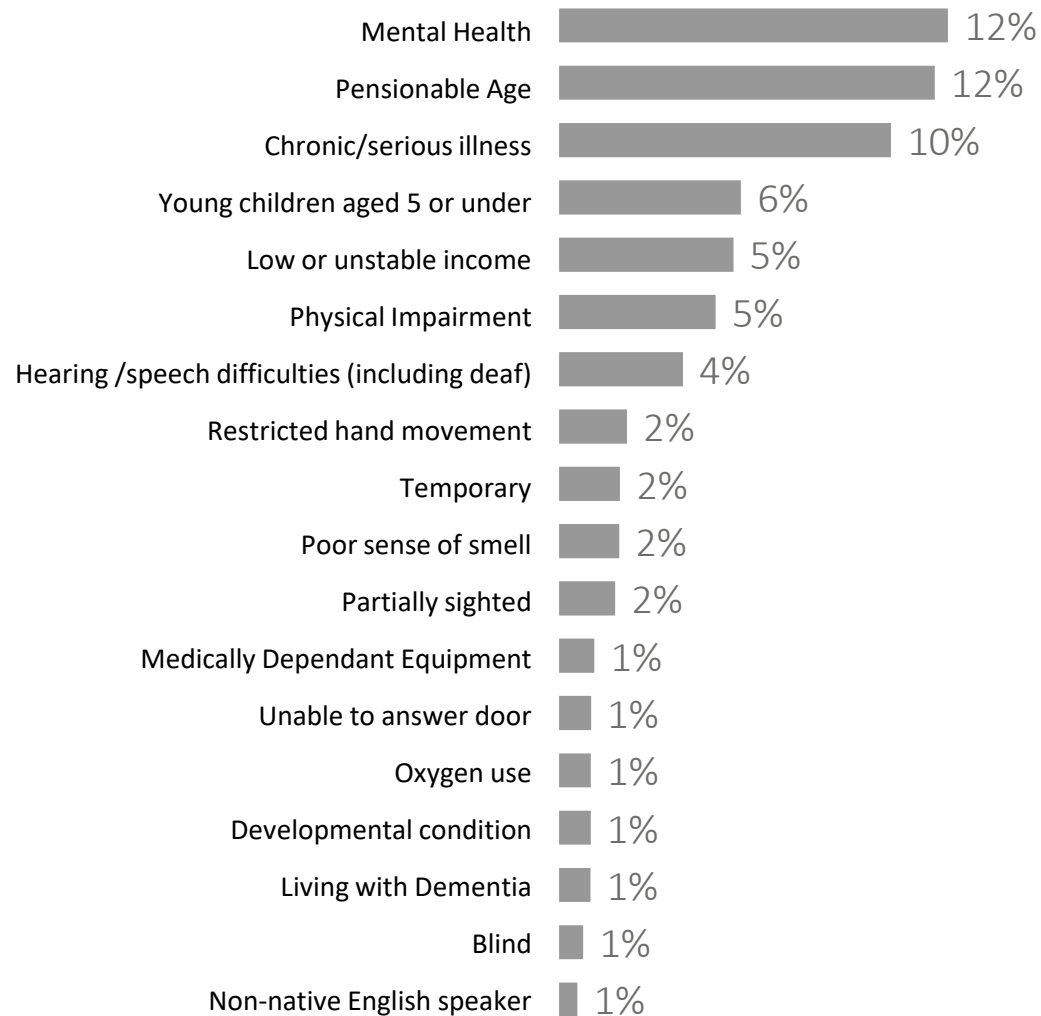


Those that had someone in their household registered on the **PSR**:

**Wales:** 8%

**England:** 8%

## Vulnerable Customers



D8 Which of the following statements best describes your situation? Base: All Domestic (804)

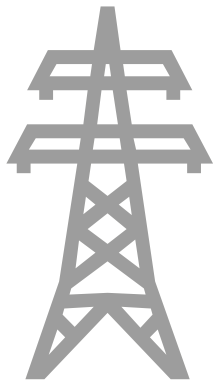
D9 Is anyone in your household registered on the Priority Service Register? Base: All Domestic (804)

D10 Do you feel that any of the following factors apply to you or anyone in your household at the moment that might mean you need extra support? Base: Domestic (804) Vulnerable (274)

# QUANTITATIVE DOMESTIC CUSTOMER PROFILE

The majority of customers use electricity and gas with a small number also using renewable energy.

## Fuel usage type



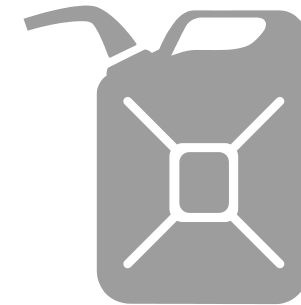
99%  
Mains  
electricity  
supply



100%  
Mains  
gas  
supply

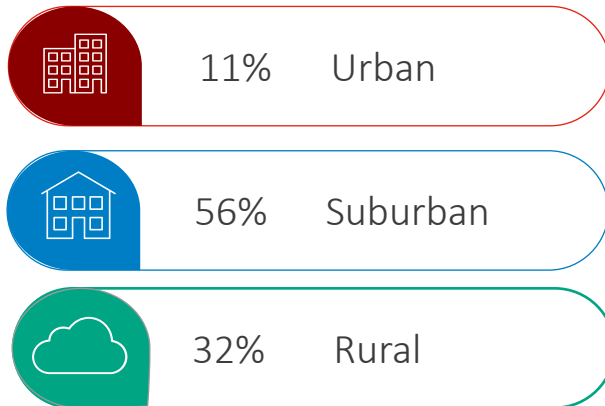


7%  
Renewable  
energy

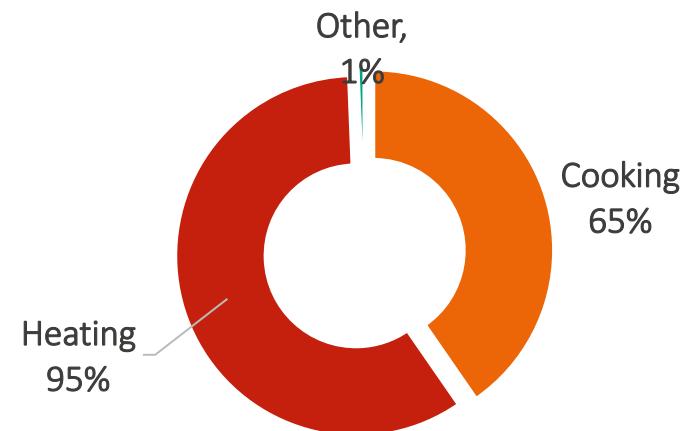


1%  
Other fuel  
source e.g. oil  
or gas  
canisters

## Location of home

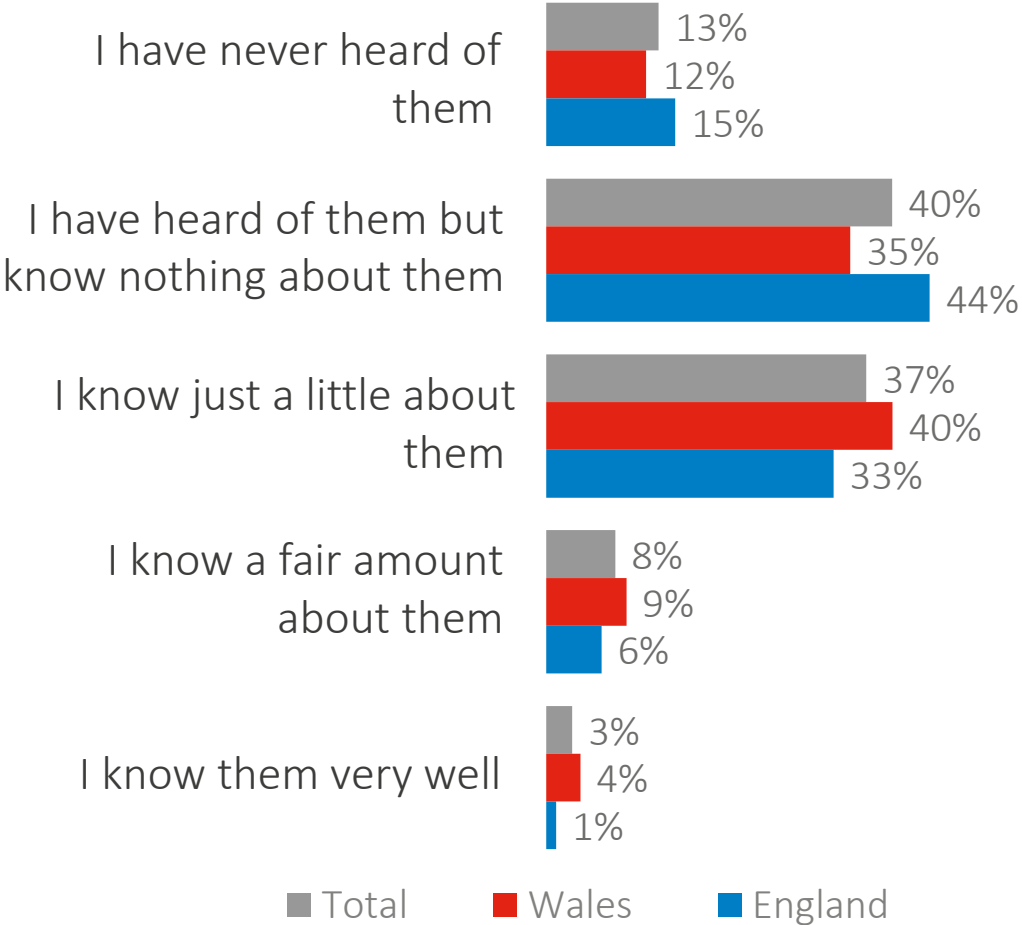


## Domestic Gas Usage

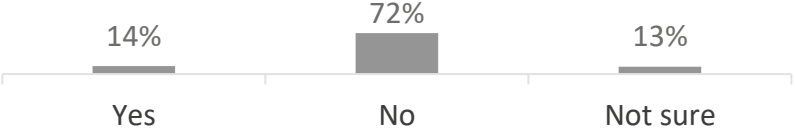


Awareness of WWU has increased since 2019, now only 13% have never heard of WWU and 7 in 10 have never had contact with WWU

### How well do you know WWU?



### Before today, have you ever had contact with WWU?



### What did you contact WWU about?

- An unplanned gas leak/ Emergency (31%)
- A planned supply interruption (20%)
- A gas connection network (18%)
- Road works or re-instalment of land (8%)

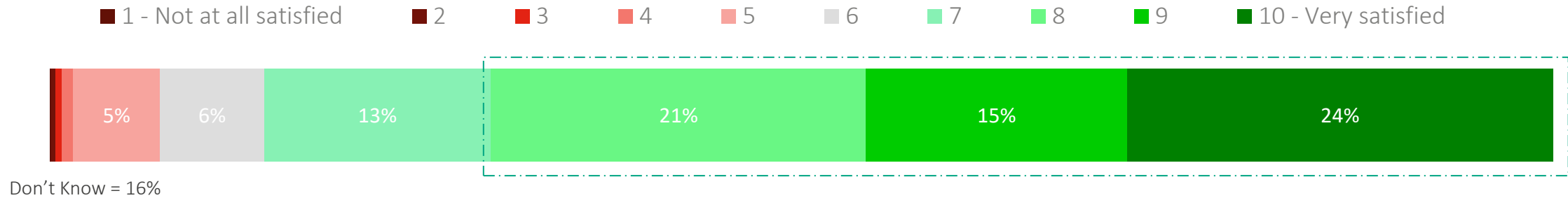
### How did you get in contact with WWU?

- Gas leak emergency contact number (29%)
- General enquiries contact number (22%)
- Contact form via website (10%)
- Direct department number via website (9%)
- Sent email to specific email address (5%)



Q1 How well do you feel you know Wales & West Utilities (WWU) and the services it is responsible for? Base: All domestic (804), Wales (397), England (407)  
 Q2 Before today, have you ever had contact with WWU? Base: Domestic (804).  
 Q3 And on the last time you needed to contact WWU, what did you contact them about? Base: Domestic who have contacted WWU (109)  
 Q4 How did you get in contact with WWU? Base: Domestic who have contacted WWU (109)

Satisfaction has increased since 2019 overall, with an increase for those aware of WWU, respondents considered fuel poor and aged 18-55.

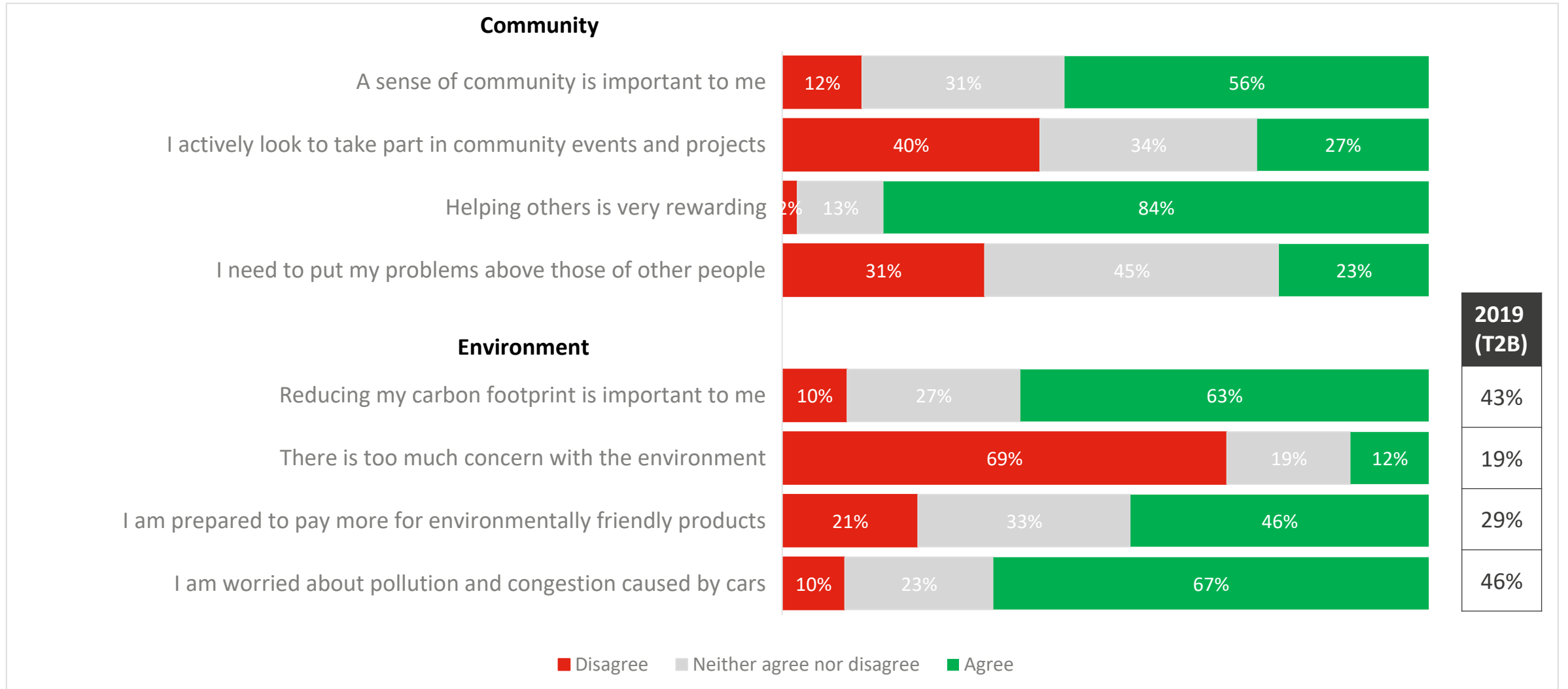


Year	2021 (T2B)							
	2021 Overall (8-10)	No Awareness	Little/Fair Awareness	18-24	18-55	55-75+	On PSR	Fuel Poor
	59% (804)	48% (431)	82% (77)	44% (92)	55% (410)	71% (302)	64% (69)	55% (33)
Year	2019 WTP (T2B)							
	2019 WTP Overall (8-10)	No Awareness	Little/Fair Awareness	18-24	18-55	55-75+	On PSR	Fuel Poor
	31% (772)	27% (470)	42% (66)	35% (66)	29% (404)	33% (368)	37% (93)	26% (65)

Q5 Overall, how satisfied are you with the service provided by WWU? Base: All Domestic (804)  
 Q1 How well do you feel you know Wales & West Utilities (WWU) and the services it is responsible for? Base: All domestic (804).  
 S7 What is your age? Base: All Domestic (804), D9 Is anyone in your household registered on the Priority Service Register? Base: All Domestic (804),  
 S5 Which of the following energy sources do you use at your home? Base: All Domestic (804)

# PROFILING - DOMESTIC

## Lifestyle information



D3B Below are some statements that describe different attitudes to life in general. Please indicate how much you agree or disagree with each of the statements on a scale from 1 to 5 where 1 means 'definitely disagree' and 5 means 'definitely agree' Base: All Domestic (804)



# THANK YOU

EVELIN ROBERTS  
SENIOR RESEARCH EXECUTIVE  
Evelin.Roberts@impactmr.com

DAWN MULVEY  
CLIENT DIRECTOR  
Dawn.Mulvey@impactmr.com

Office: 44 (0) 1932 226793

Impact Research Ltd, 3 The Quintet, Churchfield Road, Walton-on-Thames,  
KT12 2TZ, United Kingdom

All projects are carried out in compliance with the ISO 20252 international  
standard for market, opinion and social research and GDPR.

# IMPACT

FROM INSIGHT TO INFLUENCE