



The voice for water consumers
Llais defnyddwyr dŵr



Water Matters 2025 Highlights Report

Similarly, while across each aspect of satisfaction with sewerage service, almost every company saw a small improvement (even in ‘satisfaction with cleaning waste water’ which saw the largest falls in score last year), these are still below where they were before the dip in 2023 – and the average score over the last ten years.

However, this year’s overall record low scores are in many cases a result of regional variation in customers’ views. For instance, the majority of companies improved their

trust scores from last year. Among those that did not, scores fell further still – particularly Thames Water and South West Water - which resulted in the overall average trust score across England and Wales being slightly lower than in 2023 (6.28 in 2024 vs 6.37 in 2023).

But as table 1, below, shows, even where there were improvements – although welcome – trust scores this year are still far from the average over the past decade for every company.

Table 1: Changes in trust score by company, 2023-24, compared with the 10-year average

Company	2023	2024	10-year rolling average
Anglian Water	6.45	6.46	7.45
Dŵr Cymru Welsh Water	6.94	6.86	7.79
Hafren Dyfrdwy	6.83	6.80	7.53
Northumbrian Water	6.90	6.91	7.75
Severn Trent Water	6.57	6.61	7.49
South West Water	6.14	5.42	6.95
Southern Water	5.44	5.74	6.77
Thames Water	5.79	5.12	6.81
United Utilities	6.62	6.57	7.49
Wessex Water	6.53	7.02	7.66
Yorkshire Water	6.63	6.50	7.61
Affinity Water	6.35	6.46	7.21
Bristol Water	6.54	6.70	7.59
Cambridge Water	6.37	6.77	7.49
Essex & Suffolk Water	6.93	6.81	7.45
Portsmouth Water	5.89	6.83	7.39
South East Water	5.49	5.81	6.93
South Staffordshire	6.52	6.70	7.50
Sutton & East Surrey	6.72	6.63	7.31

Companies in green improved their trust score from last year, while companies in red saw a further fall.

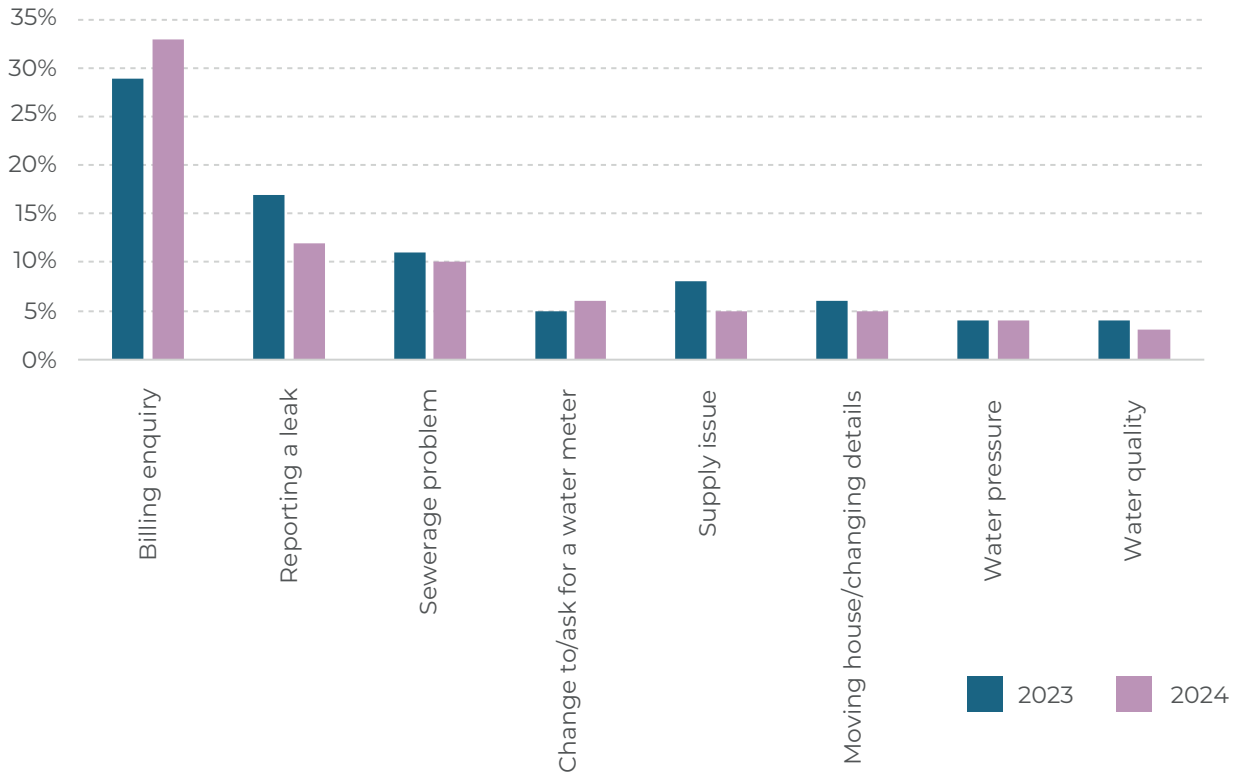
Value for money and concern with bills

When it comes to value for money, for both water and sewerage services (down to 65% and 67% net satisfied, respectively) as well as fairness of charges (down to 53% agreeing that charges are fair), this year saw scores fall significantly from last year’s record low scores. It is important to note that fieldwork took place prior to the announcement of bill increases in January 2025 – so the findings may not capture the full extent of the struggles people have with affording their

water bills. But it is significant that, even before these increased bills are taken into account, over the last twelve months we have seen a significant increase in the number of customers contacting their company with billing enquiries – now making up a third of all customer contact (up from 29% last year). To put this in context, this is as much as the next four most common reasons for contacting put together (see figure 2):



Figure 2: Most common reasons for contacting company, 2023-2024



Company contact

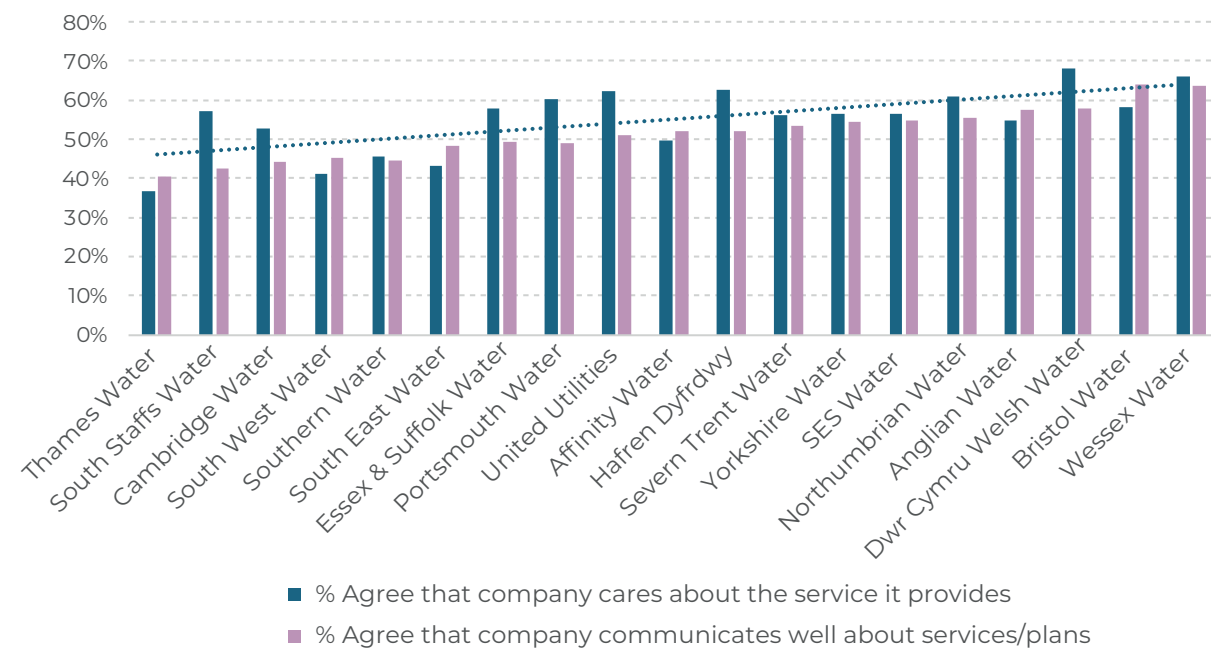
This year, a record number of people said they had contacted their company in the past 12 months – up to 27%, a significant increase from 25% last year. We also recorded the highest ever customer engagement score in Water Matters history.¹

However, when it comes to overall satisfaction with contact, there has been little change from last year's record low score – up slightly (but not significantly) from 74% to 75%. This represents a clear downward trend over the past ten years. As was the case in most previous years, satisfaction with 'the way you were kept informed of

progress' was significantly the lowest of the different elements of contact. This is something that people have consistently said in our Water Matters surveys, and so is a clear area for improvement to help revive overall satisfaction scores.

Positively, there has been an improvement on last year's score when it comes to 'how well does your company communicate with you about its services and plans'. But the vast majority (81%) of those who said their company did not communicate well mentioned a lack of regular communication.² This highlights an opportunity for companies as we can see a

Figure 4: Proportion of customers who agreed that their company cares about the service it provides, against those who agreed their company communicates well about its services and plans (2024)



¹ The Customer Engagement score is put together by combining the following five individual measures: 1) Likelihood of contacting their water company if they are worried about paying their bill, 2) Awareness and/or subscription to additional help/services, 3) Awareness and/or subscription to Watersure/Watersure Wales/Welsh Water Assist and other special tariffs, 4) Awareness of their right to revert for free/meter for free, and 5) Whether they made contact with water/sewerage company

² i.e. a response which was coded 'don't recall any communication apart from bill', 'not had communication' or 'don't get regular correspondence'

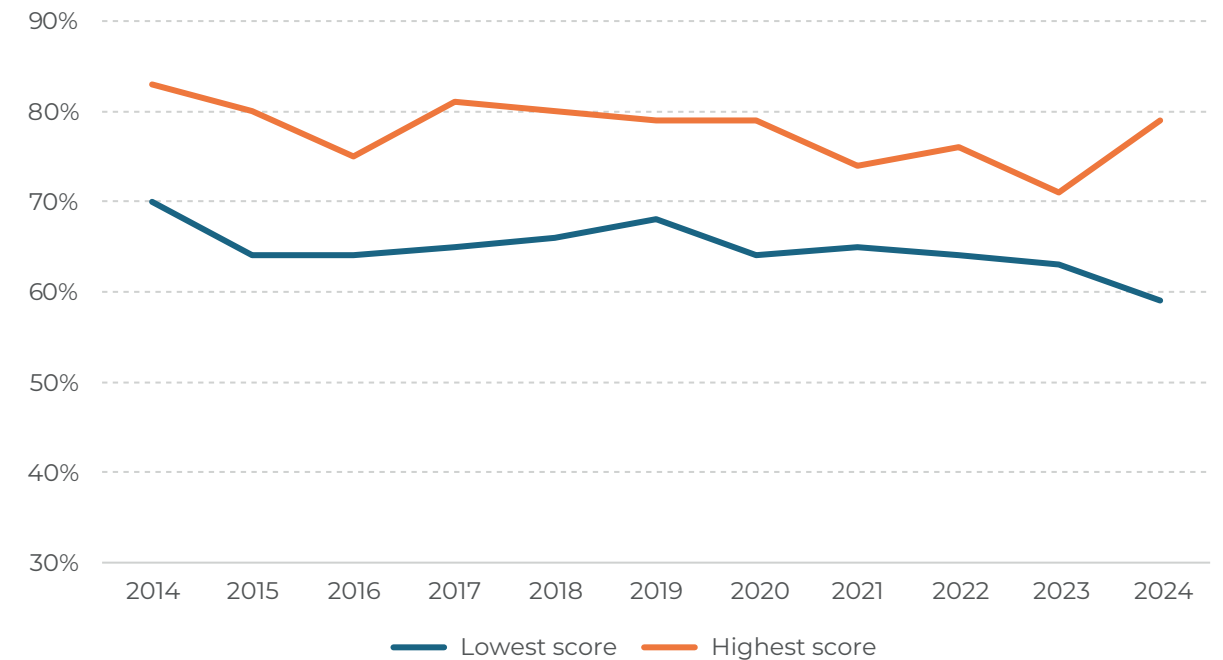


Figure 5: Highest and lowest company score for how likely a customer would be to contact their company if worried about paying bills, 2014-2024

correlation between how well customers think their company communicates on its services/plans, and whether they think companies care about the service they provide. The need for improved communication is reinforced by the fact that we have seen an increasing public misconception in this year's Water Matters when it comes to the safety of drinking water. People were significantly less likely than last year to be satisfied with this – down 3% to 85%, quite out of line with the wider trend of satisfaction with water supply. This chimes with our recent priorities research, which found that concern with the safety of drinking water was a growing topic of discussion online.

More encouragingly, the percentage of customers across England and Wales who were aware that their company offered financial support to those struggling to pay bills increased from 45% to 49% - almost reaching CCW's Forward Work Programme target of 50% to be reached in Water Matters 2026.

While there was an overall increase in customers who said they would contact their company if they were worried about paying bills, this varies by company more than in any previous year, having narrowed in previous years – a 20% gap between the highest and lowest scoring company (see figure 5, above). As set out above, regional variation is an increasingly significant factor in our Water Matters findings. CCW wants to see a more consistent improvement across England and Wales in next year's report. Companies will need to work together and share best practice to address this.

This year we will see a huge roll out of smart water meters across the industry, which will provide a great opportunity for companies to increase and improve their engagement with their customers. It is essential that companies get this right: ineffective communication around smart metering has the potential to further increase contact and impact negatively on satisfaction and trust.



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