



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

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ccw.org.uk

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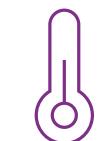
Our Research Approach



Objectives

The Water Voice **Barometer** and **Spotlight** activities capture customers' voices on a regular basis and in a meaningful way, providing timely insight into how people feel about their water company and the issues that matter most.

- The **Barometer** tracks overall sentiment and trust, helping CCW and water companies monitor changes in performance and customer priorities over time.
- The **Spotlight** explores a specific issue, focused on service experience to environmental performance, providing richer understanding of customers' views and expectations.
- Every month we will focus on one or two specific topics. This month we are going to be focusing on **water and waste infrastructure**.



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Key objectives:

- Ensure customer feedback remains a consistent, evidence-based part of accountability and decision-making across the water sector.
- Build a continuous picture of customer satisfaction, trust, and perceived value to inform improvement and transparency.
- Capture regular sentiment tracking through Barometer surveys.
- Provide deeper thematic insight through Spotlight surveys.
- Identify recurring patterns, emerging concerns, and opportunities for improvement at water-company level.

Methodology



Findings in this report are drawn from members of the Water Voice Community, a diverse group of customers representing all water company regions across England and Wales.

Insights are gathered through two complementary approaches:

- **Barometer surveys** – a recurring monthly survey that tracks evolving sentiment and customer confidence.
- **Spotlight surveys** – a monthly thematic focused survey exploring a range of key issues.

This approach is qualitative and attitudinal, rather than statistically representative. It focuses on customers' experiences, expectations, and perceptions.

- ✓ All responses are analysed to identify recurring themes, emerging concerns, and opportunities for improvement.
- ✓ Findings are presented at **water company level** where differences in customer insights are meaningful and actionable.



Sample



Each Water Voice community includes around **50 participants per water company**, reflecting a balanced mix of demographics, life stages, and perspectives.

The communities were designed to ensure inclusive representation, including:

- People experiencing financial hardship (boosted <£20k income quota alongside those who are on benefits, discounted water tariffs or struggle to pay their bills)
- Individuals with limited digital skills or access
- Neurodivergent participants and those with accessibility needs
- Residents of remote or rural areas



Each community also includes **at least one participant from each major geographic sub-region**, ensuring that local context and regional differences are captured.

An **attitudinal segmentation** framework ensures that both **positive and critical voices** are represented, providing a credible and rounded picture of customer opinion.

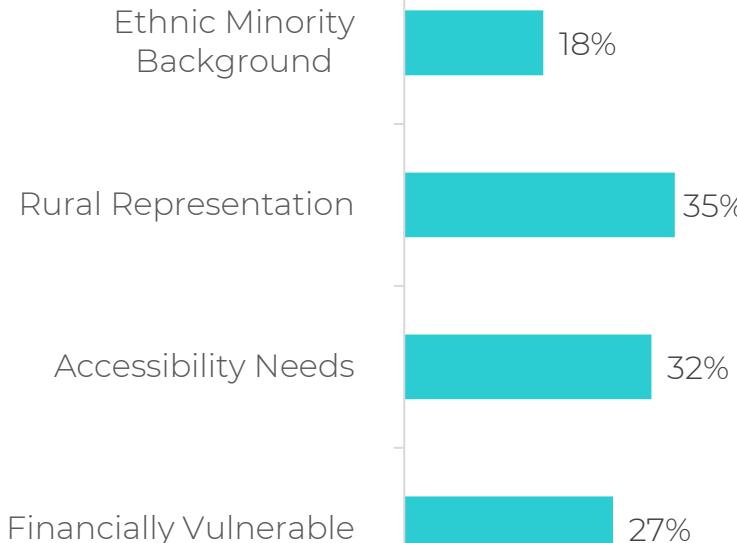
Sample

Water Voice sample in detail, at total level across all 16 communities

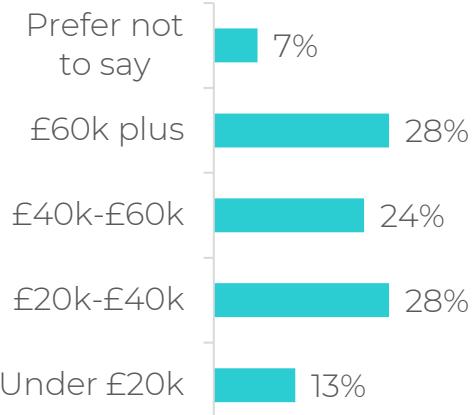


830 members onboarded
796 actively participated

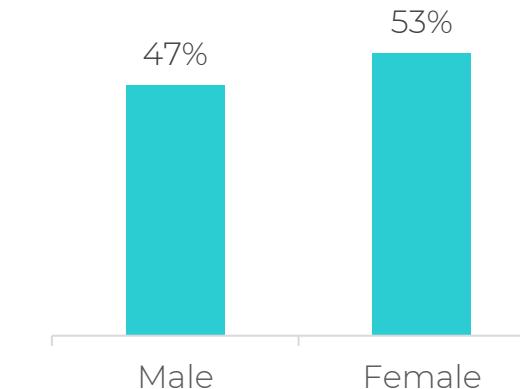
Inclusivity



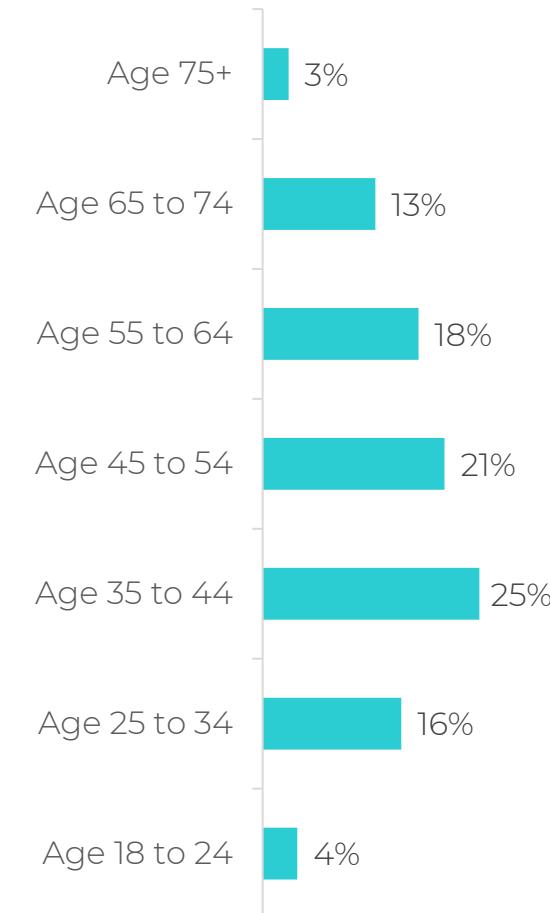
Household income



Gender



Age



Attitude to Water company



Executive Summary

Total results, across all 16 communities



	Topic	total agreement%
Spotlight	Responsiveness (Always/often responsive)	29%
	Recent Experience (Positive recent experience)	42%
	General outlook (Positive outlook)	46%
	Communication (Fair/good communication)	34%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%
	Trust (a great deal/some trust)	48%
	Past 4 Week Interaction	39%
	Past 4 Week Disruption	5%
	Past 4 Week Water Quality Issues	7%
	Past 4 Week Sewerage issues	2%
	Overall Value for Money (satisfied, scoring 7-10)	40%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%
	Colour & Appearance (satisfied, scoring 7-10)	82%
	Taste & Smell (satisfied, scoring 7-10)	75%
	Safety of Drinking Water (satisfied, scoring 7-10)	77%
	Reliability of Supply (satisfied, scoring 7-10)	87%
	Water Pressure (satisfied, scoring 7-10)	77%
	Overall Satisfaction - Sewerage	51%
	Reducing smells from sewage treatment works (satisfied, scoring 7-10)	31%
	Maintenance of sewerage pipes and treatment works (satisfied, scoring 7-10)	35%
	Cleaning wastewater properly before release back into environment (satisfied, scoring 7-10)	30%
	Minimising sewer flooding (satisfied, scoring 7-10)	30%

We will update this dashboard each month to display month on month % figures

Core themes

What matters most to our community?



Across all Water Voice communities, there is a consistent call for:

- Greater transparency and clearer follow-through on commitments
- Continued focus on environmental and infrastructure improvements
- More proactive, human-centred communication

While satisfaction levels vary by company, most customers want ongoing dialogue and evidence that their input leads to action.

Overall, the combined data highlights both trust-building opportunities and emerging reputational risks.

“We need more community level communication about local water issues such as leak repairs, pressure variations, or conservation goals.”

Male, 33, Lives with partner & children, Affinity Water

“More engaging campaigns telling customers where our money is going and how it's helping us, the environment and future investment would be good”

Male, 24, Lives with partner, Welsh Water



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Water Voice Barometer & Spotlight Report

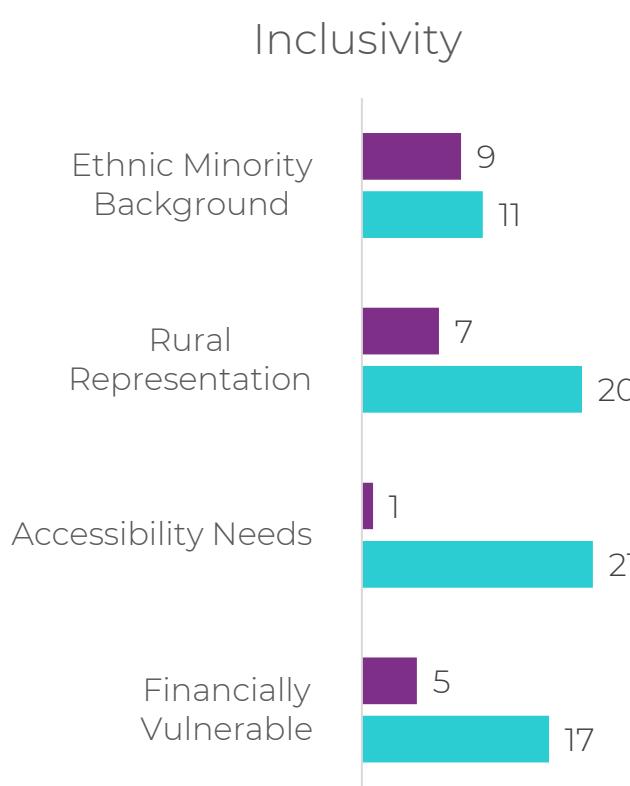
Anglian Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

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Anglian Water Community members: n=49



Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are slightly lower in our youngest age bracket within this community; this is due to 2 last minute drop-outs in this category when closing the survey. We are currently working on boosting the sample in this age category for next month.'

Current Quota Minimum Quota

Dashboard Summary



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	Topic	Agreement % for total sample	Anglian Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	27%	-2%
	Recent Experience (Positive recent experience)	42%	49%	+7%
	General outlook (Positive outlook)	46%	55%	+9%
	Communication (Fair/good communication)	34%	24%	-10%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	24%	-1%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	18%	-2%
	Trust (a great deal/some trust)	48%	54%	+6%
	Past 4 Week Interaction	39%	47%	+8%
	Past 4 Week Disruption	5%	4%	-1%
	Past 4 Week Water Quality Issues	7%	10%	+3%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	33%	-7%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	55%	+3%
	Colour & Appearance	82%	82%	0%
	Taste & Smell	75%	69%	-6%
	Safety of Drinking Water	77%	76%	-1%
	Reliability of Supply	87%	86%	-1%
	Water Pressure	77%	78%	1%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	51%	0%
	Reducing smells from sewage treatment works	31%	30%	-1%
	Maintenance of sewerage pipes and treatment works	35%	36%	+1%
	Cleaning wastewater properly before release back into environment	30%	26%	-4%
	Minimising sewer flooding	30%	32%	+2%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members
 Total Base Size: 796
 Anglian Water Base Size: 49

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction is steady but uncertain value for money perceptions suggests a strong opportunity for Anglian Water to lift these through clearer, more proactive communication about what they are doing and why.
- Anglian Water score well on the overall water satisfaction metric, which is helping to drive trust.

Spotlight



- Trust is higher among Anglian Water customers and although responsiveness and communication is slightly lower than average it isn't impacting on experience or outlook. Could more be done to align communication with customer priorities?
- Anglian Water customers think they are more informed on the water and sewage treatment than the norm. Opportunity to educate more customers on the water and sewerage process and provide updates on water availability.



As a customer, overall, how satisfied are you with Anglian Water?

6.62/10 vs 6.26/10 (total)

Why do Anglian water customers feel this way?

Customers say their water supply is generally reliable, with good quality and helpful support when issues arise, but many feel communication, billing clarity and action on leaks, sewerage and environmental performance need improvement.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

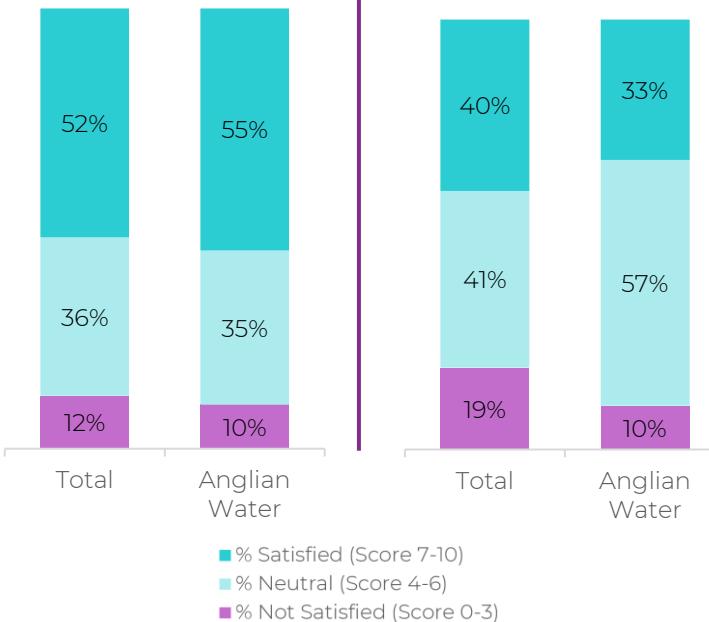
Active Community members
Total Base Size: 796
Anglian Water Base Size: 49



Anglian Water: Barometer Findings

55% are satisfied with Anglian Water overall
10% are not satisfied

Overall Satisfaction - Water



Satisfaction is slightly above average with value for money perceptions being dominated with higher “neutral” scores.

Customers generally feel Anglian Water provides a reliable, good-quality service with few day-to-day issues.

Why have you given this overall satisfaction score on water?

“I turn the tap on and drinkable water comes out. I flush the toilet and it goes away. I do not need any more from a water supplier.”

*Male, 70,
Lives with partner/spouse, 8/10
satisfaction score*

“Bills change and increase but there isn’t any communication or reason why.”

*Male, 39, Lives with partner/spouse, 3/10
satisfaction score*

“They need to take less profit and clean up our waterways. Stop leaks.”

*Male, 64, Lives with partner/spouse, 3/10
satisfaction score*

Satisfaction is steady but uncertain value for money perceptions suggests a strong opportunity for Anglian to lift these through clearer, more proactive communication about what they are doing and why.

Active Community members
Total Base Size: 796
Anglian Water Base Size: 49



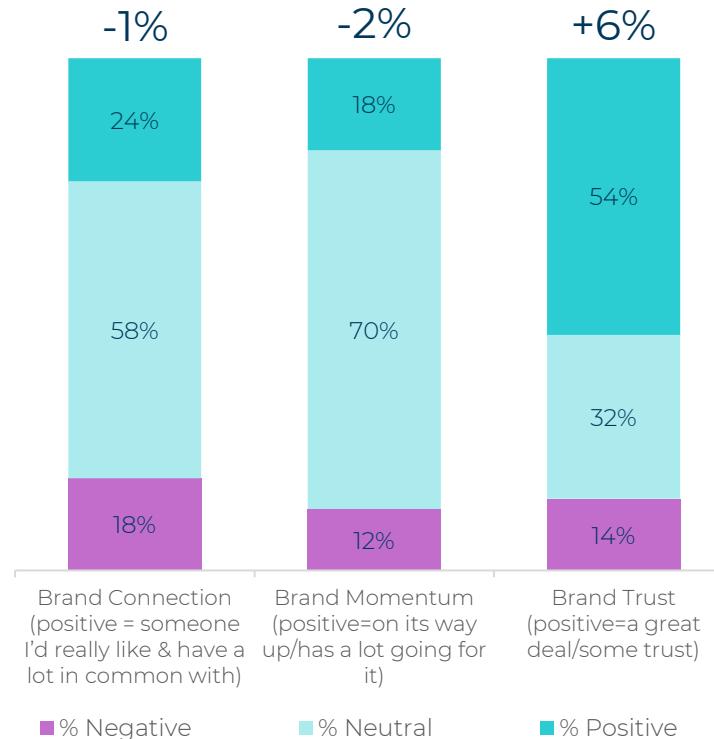
Anglian Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Anglian Water in relation to Connection, Momentum & Trust



% Who agree that Anglian Water...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

43% +1%
12% - 9%
20% - 4%
14% - 5%
31% +4%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Overall Satisfaction 55% +3%
Colour & Appearance 82% 0%
Taste & Smell 69% -6%
Safety of Drinking Water 76% -1%
Reliability of Supply 86% -1%
Water Pressure 78% +1%

Sewerage

Overall Satisfaction 51% 0%
Reducing smells from sewage treatment works 30% -1%
Maintenance of sewerage pipes and treatment works 36% +1%
Cleaning wastewater properly before release back into environment 26% -4%
Minimising sewer flooding 32% +2%

Anglian Water score well on overall water satisfaction metrics, which is helping to drive trust and satisfaction scores.

Active Community members
Total Base Size: 796
Anglian Water Base Size: 49



Anglian Water: Spotlight Findings

Anglian Water customers value safe, high-quality drinking water and see this as a number 1 priority, followed by a need for Anglian Water to do what they can to reduce leaks in the system and invest in sewerage infrastructure and treatment.

Ranking Customer Priorities

% Very Important

Water

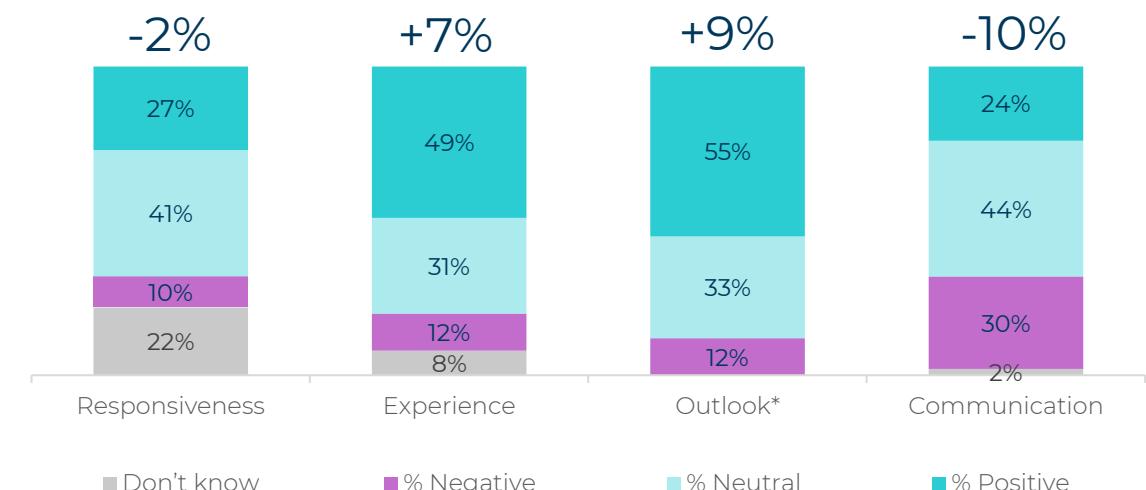
1. Safe drinking water: 100%
2. Reducing leaks: 86%
3. Upgrading water mains and pipes for a reliable supply: 67%

Sewerage

1. Maintenance of sewerage pipes and treatment works: 80%
2. Reducing the amount of wastewater entering the environment: 76%
3. Reducing smells from sewage treatment works: 41%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Anglian Water in relation to Responsiveness, Experience, Outlook & Communication



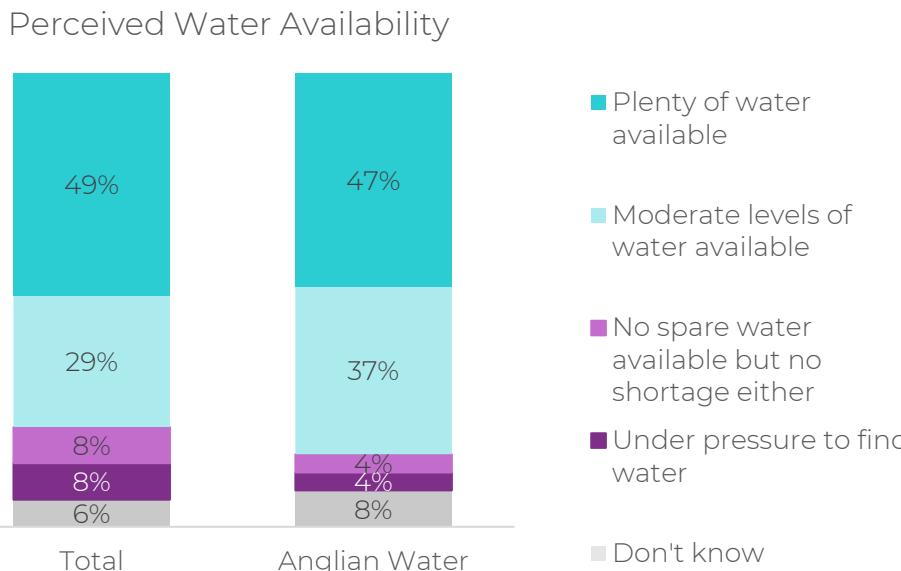
*Which statement best describes your general outlook on {water company}

We know that trust and satisfaction are performing well. Although responsiveness and communication are slightly lower than average, it isn't impacting on experience or outlook. Could more be done to align communication with customer priorities?

Active Community members
Total Base Size: 796
Anglian Water Base Size: 49

Water Resources

Anglian Water customers are slightly less likely to think there is plenty of water available in their area. As a community they are **more informed** on the water treatment process.



Water Process

63% of consumers say they **know a lot or a little** about the water process (+12%)

37% **don't know much or know nothing** about it (-12%)

Sewerage Process

51% of consumers say they **know a lot or a little** about the wastewater process (+3%)

49% **don't know much or know nothing** about it (-3%)

"Make water saving measures available for all households, toilet cistern savers I had never heard of until this survey, I have already been looking them up!"

Female, 31, Young Family, Anglian Water Customer

Anglian Water customers think they are **more informed** on the water and sewage treatment than the norm. Opportunity to educate more customers on the water and sewerage process and provide updates on water availability.

Active Community members
Total Base Size: 796
Anglian Water Base Size: 49



The voice for water consumers
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Water Voice Barometer & Spotlight Report

Northumbrian Water and Essex & Suffolk Water

November 2025

Delivered by Taylor McKenzie
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Version: Final copy 15.12.25

ccw.org.uk

Northumbrian Water and Essex & Suffolk Water

Community population



Northumbrian Water Community members:

n=30

Essex & Suffolk Water Community members:

n=20

Inclusivity

Ethnic Minority Background

Rural Representation

Accessibility Needs

Financially Vulnerable

Household income

Prefer not to say

£60k plus

£40k-£60k

£20k-£40k

Under £20k

Gender

Male

Female

Age

Age 75+

Age 65 to 74

Age 55 to 64

Age 45 to 54

Age 35 to 44

Age 25 to 34

Age 18 to 24

Attitude to Water company

Negative

Neutral

Positive

7

8

16

8

28

8

Sample note: We have met over 95% of our sample target quotas. We are currently working to boost our ethnic minority background quota within this community as we had a few members drop out at the time the survey closed.

Current Quota

Minimum Quota

2

7

10

15

12

25

23

25

23

9

14

12

13

9

12

12

1

17

21

5

21

7

8

16

8

28

8

Dashboard Summary

	Topic	Agreement % for total sample	Northumbrian Water and Essex & Suffolk Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	28%	-1%
	Recent Experience (Positive recent experience)	42%	51%	+9%
	General outlook (Positive outlook)	46%	55%	+9%
	Communication (Fair/good communication)	34%	34%	0%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	28%	+3%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	26%	+6%
	Trust (a great deal/some trust)	48%	60%	+12%
	Past 4 Week Interaction	39%	34%	-5%
	Past 4 Week Disruption	5%	10%	+5%
	Past 4 Week Water Quality Issues	7%	8%	+1%
	Past 4 Week Sewerage issues	2%	6%	+4%
	Overall Value for Money	40%	46%	+6%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	64%	+12%
	Colour & Appearance	82%	80%	-2%
	Taste & Smell	75%	80%	+5%
	Safety of Drinking Water	77%	80%	+3%
	Reliability of Supply	87%	92%	+5%
	Water Pressure	77%	80%	+3%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	64%	+13%
	Reducing smells from sewage treatment works	31%	36%	+5%
	Maintenance of sewerage pipes and treatment works	35%	40%	+5%
	Cleaning wastewater properly before release back into environment	30%	34%	+4%
	Minimising sewer flooding	30%	28%	-2%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members
 Total Base Size: 796
 Northumbrian Water and Essex & Suffolk Water Base Size: 50

Executive Summary

Overview of Key Findings

Barometer

- General satisfaction and value for money satisfaction is strong. Continue to build on positive experiences & perceptions.
- Northumbrian Water and Essex & Suffolk Water score well on all water satisfaction metrics, which is helping to drive very positive trust scores.

Spotlight

- Sewerage, including maintenance & reducing wastewater entering the environment, is very important to customers. There is an opportunity for Northumbrian Water and Essex & Suffolk Water to demonstrate the work they do in managing this.
- There is an opportunity for Northumbrian Water and Essex & Suffolk Water to develop and distribute simple communications that allow customers to better understand these important water & sewerage processes.

As a customer, overall, how satisfied are you with Northumbrian Water and Essex & Suffolk Water?

6.84/10 vs 6.26/10 (total)

Why do Northumbrian Water and Essex & Suffolk Water customers feel this way?

Customers say their water supply & quality is generally reliable and repairs are prompt when required. But some raise concerns about rising costs, unclear bills and inconsistent communication. No clear differences emerged across companies.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
Total Base Size: 796
Northumbrian Water and Essex & Suffolk Water Base Size: 50

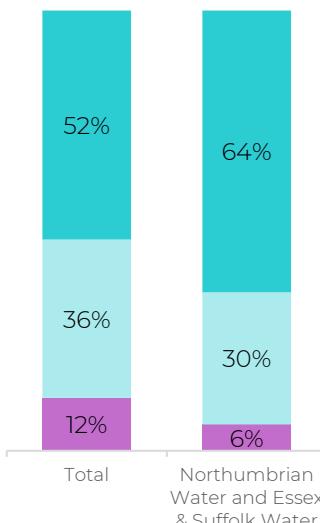


Northumbrian Water and Essex & Suffolk Water: Barometer Findings



64% are satisfied with Northumbrian Water and Essex & Suffolk Water overall
6% are not satisfied

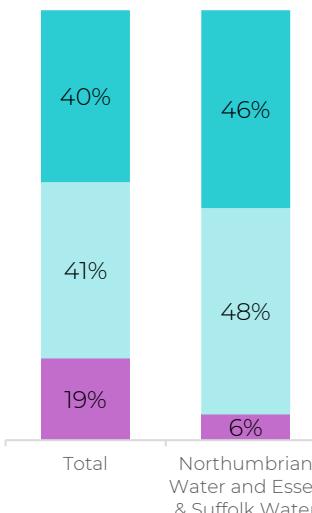
Overall Satisfaction - Water



46% are satisfied with value for money

6% are not satisfied

Overall Value for Money Satisfaction



Satisfaction is above Industry Average. Dissatisfaction is also low.

Customers generally feel Northumbrian Water and Essex & Suffolk Water provides a reliable, good-quality service with few day-to-day issues.

Why have you given this overall satisfaction score on water?

“Never had any issues with my water.”

Female, 26, lives with partner/spouse and my child/children, Northumbrian Water, 10/10 satisfaction score

“I just pay my bill when its due. I don't have any issues at the moment.”

Female, 75, lives alone, Northumbrian Water, 7/10 satisfaction score

“Too expensive and pollute our rivers, streams and lakes with sewage.”

Male, 44, lives with partner/spouse and children, Northumbrian Water, 0/10 satisfaction score

General satisfaction and value for money satisfaction is strong. Continue to build on positive experiences & perceptions.

Active Community members
Total Base Size: 796
Northumbrian Water and Essex & Suffolk Water Base Size: 50



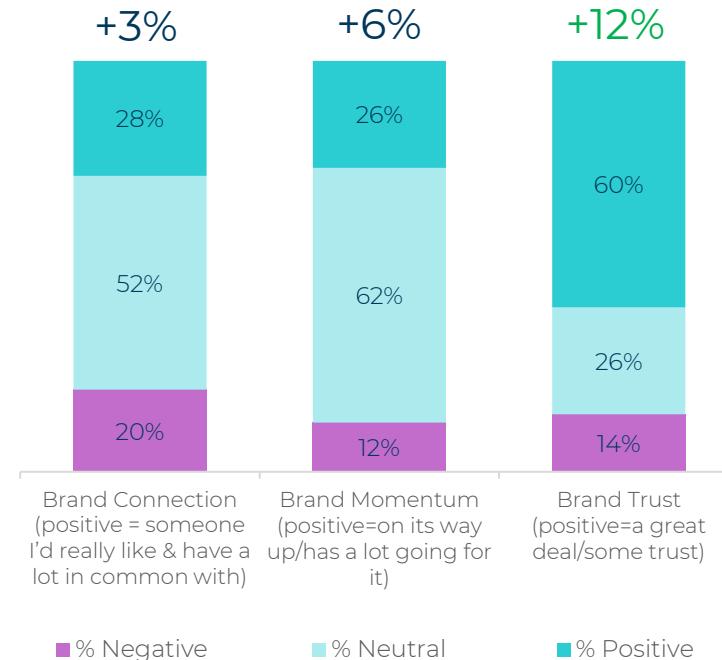
Northumbrian Water and Essex & Suffolk Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Northumbrian Water and Essex & Suffolk Water in relation to Connection, Momentum & Trust



% Who agree that Northumbrian Water and Essex & Suffolk Water...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

50%	+ 8%
30%	+ 9%
32%	+ 8%
20%	+ 1%
36%	+9%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Overall Satisfaction	64%	+12%
Colour & Appearance	80%	-2%
Taste & Smell	80%	+5%
Safety of Drinking Water	80%	+3%
Reliability of Supply	92%	+5%
Water Pressure	80%	+3%

Sewerage

Overall Satisfaction	64%	+13%
Reducing smells from sewage treatment works	36%	+5%
Maintenance of sewerage pipes and treatment works	40%	+5%
Cleaning wastewater properly before release back into environment	34%	+4%
Minimising sewer flooding	28%	-2%

Northumbrian Water and Essex & Suffolk Water score well on all water satisfaction metrics, which is helping to drive very positive trust scores.

Active Community members
Total Base Size: 796
Northumbrian Water and Essex & Suffolk Water Base Size: 50



Northumbrian Water and Essex & Suffolk Water: Spotlight Findings



Northumbrian Water and Essex & Suffolk Water value safe, high-quality drinking water and see this as a number 1 priority, followed by a need to reduce leaks in the system. Sewerage in general received much more frequent 'very important' scores than the average company, suggesting it is of higher priority to this customer base.

Ranking Customer Priorities

% Very Important

Water

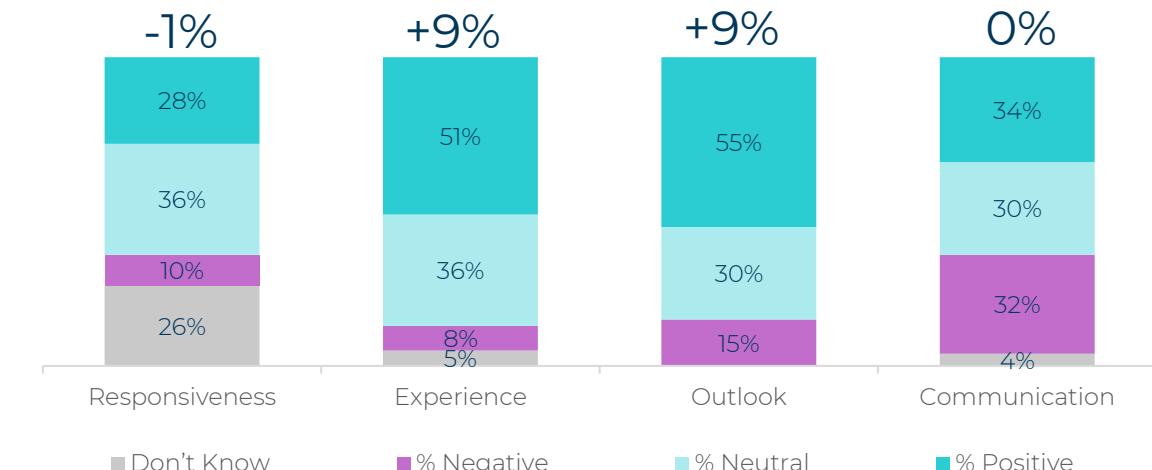
1. Safe drinking water: 91%
2. Reducing leaks: 74%
3. Upgrading water mains and pipes for a reliable supply: 70%

Sewerage

1. Reducing the amount of wastewater entering the environment: 91%
2. Maintenance of sewage pipes and treatment works: 74%
3. Reducing smells from sewage treatment works: 70%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Northumbrian Water and Essex & Suffolk Water in relation to responsiveness, experience, outlook and communication



*Which statement best describes your general outlook on {water company}

Sewerage, including maintenance & reducing wastewater entering the environment, is very important to customers. There is an opportunity for Northumbrian Water and Essex & Suffolk Water to demonstrate the work they do in managing this.

Active Community members
Total Base Size: 796
Northumbrian Water and Essex & Suffolk Water Base Size: 50



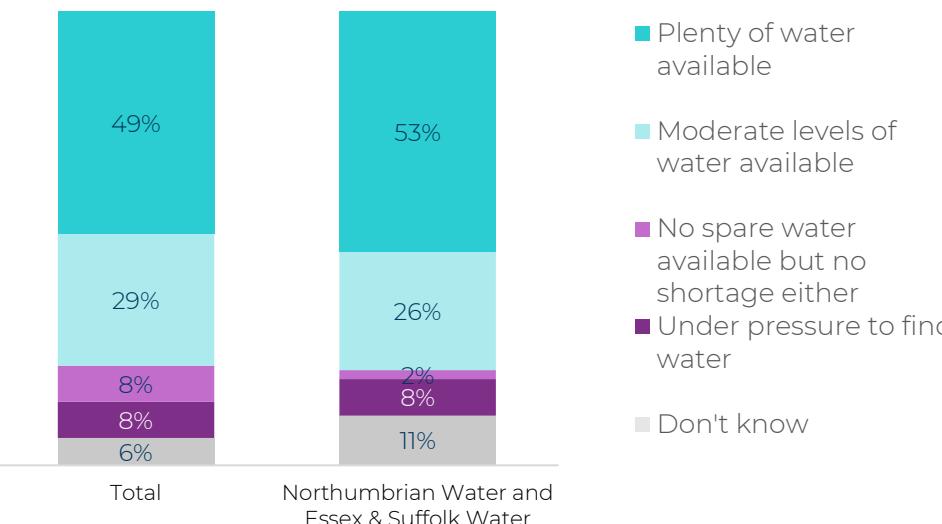
Northumbrian Water and Essex & Suffolk Water: Spotlight Findings

Processes & Resources

Water Resources

Northumbrian Water and Essex & Suffolk Water customers are slightly more likely to think there is plenty of water available where they live. They also have a higher stated awareness of both water and sewerage processes.

Perceived Water Availability



Water Process

62% of consumers say they know a lot or a little about the water process (+11%)

38% don't know much or know nothing about it (-11%)

Sewerage Process

57% of consumers say they know a lot or a little about the wastewater process (+9%)

43% don't know much or know nothing about it (-9%)



"I wasn't really sure about the process so it's interesting to see it. There is not enough awareness of these processes."

Female, 49, Young Family, Northumbrian Water and Essex & Suffolk Water

There is an opportunity for Northumbrian Water and Essex & Suffolk Water to develop and distribute simple communications that allow customers to better understand these important water & sewerage processes.

Active Community members
Total Base Size: 796
Northumbrian Water and Essex & Suffolk Water Base Size: 50



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Severn Trent Water

November 2025

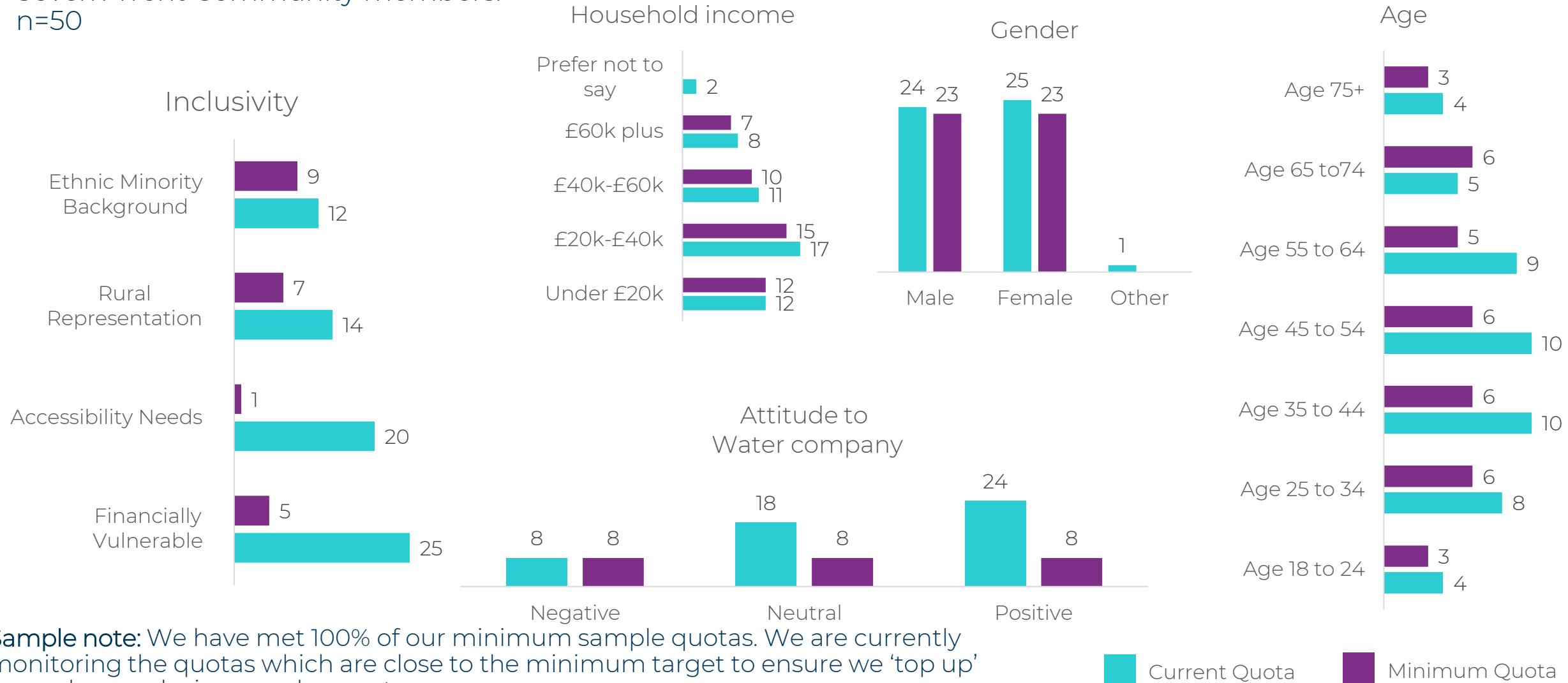
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ccw.org.uk

Severn Trent Community members: n=50



Dashboard Summary



	Topic	Agreement % for total sample	Severn Trent Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	27%	-2%
	Recent Experience (Positive recent experience)	42%	42%	0%
	General outlook (Positive outlook)	46%	48%	+2%
	Communication (Fair/good communication)	34%	40%	+6%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	20%	-5%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	18%	-2%
	Trust (a great deal/some trust)	48%	49%	+1%
	Past 4 Week Interaction	39%	52%	+13%
	Past 4 Week Disruption	5%	8%	+3%
	Past 4 Week Water Quality Issues	7%	14%	+7%
	Past 4 Week Sewerage issues	2%	0%	-2%
	Overall Value for Money	40%	36%	-4%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	48%	-4%
	Colour & Appearance	82%	76%	-6%
	Taste & Smell	75%	68%	-7%
	Safety of Drinking Water	77%	76%	-1%
	Reliability of Supply	87%	86%	-1%
	Water Pressure	77%	72%	-5%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	44%	-7%
	Reducing smells from sewage treatment works	31%	26%	-5%
	Maintenance of sewerage pipes and treatment works	35%	34%	-1%
	Cleaning wastewater properly before release back into environment	30%	32%	+2%
	Minimising sewer flooding	30%	34%	+4%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members
 Total Base Size: 796
 Severn Trent Base Size: 50

Executive Summary

Overview of Key Findings

Barometer



- High levels of neutrality suggest an opportunity to more proactively communicate with customers about what work is being done and why.
- Very high levels of neutrality – particularly in relation to brand momentum (on its way up/on its way down)– suggest a very strong opportunity for Severn Trent Water to raise their profile in the minds of customers.

Spotlight



- Communication is good and other metrics are on parity with the industry average. There is an opportunity to leverage communication channels in line with customer priorities: safe drinking water & reduced wastewater entering the environment.
- Perceptions of water availability are positive but are likely driven by low awareness of processes/reality of how much water there is. There is an opportunity to educate customers on the realities of water processing and scarcity in the region.



As a customer, overall, how satisfied are you with Severn Trent Water?

6.39/10 vs 6.26/10 (total)

Why do Severn Trent Water customers feel this way?

Customers are generally satisfied with reliability, and few mention any disruptions. Any negativity is driven by perceptions of high/rising bills and what some see as poor environmental performance. Some call for clearer communication & more visible community investment.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

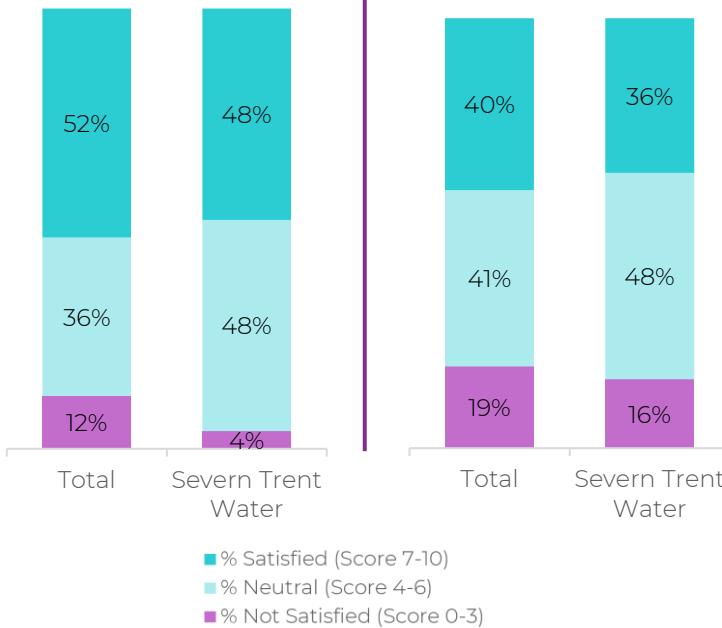
Active Community members
Total Base Size: 796
Severn Trent Base Size: 50



Severn Trent Water: Barometer Findings

48% are satisfied with Severn Trent Water overall
4% are not satisfied

Overall Satisfaction - Water



Satisfaction is slightly lower than average, but dissatisfaction in these areas is also lower with a high proportion of 'neutral' customers.

Perceptions are fairly mixed but there is a lot of neutrality generally. Opinion is fairly divided on aspects such as water quality, but on the whole customers report few issues.

Why have you given this overall satisfaction score on water?

"I don't remember having water cut in supply or disrupted due to work going on. I am generally quite happy."

Male, 55, lives alone, Severn Trent Water, 10/10 satisfaction score

"No strong opinion but nothing has gone badly"

Female, 33, lives alone, Severn Trent Water, 6/10 satisfaction score

"Neither satisfied or dissatisfied, as I have little to do with them at the moment. However, I don't see or hear anything about them very often"

Male, 48, lives with partner/spouse & children, Severn Trent Water, 5/10 satisfaction score

High levels of neutrality suggest an opportunity to more proactively communicate with customers about what work is being done and why.

Active Community members
Total Base Size: 796
Severn Trent Base Size: 50



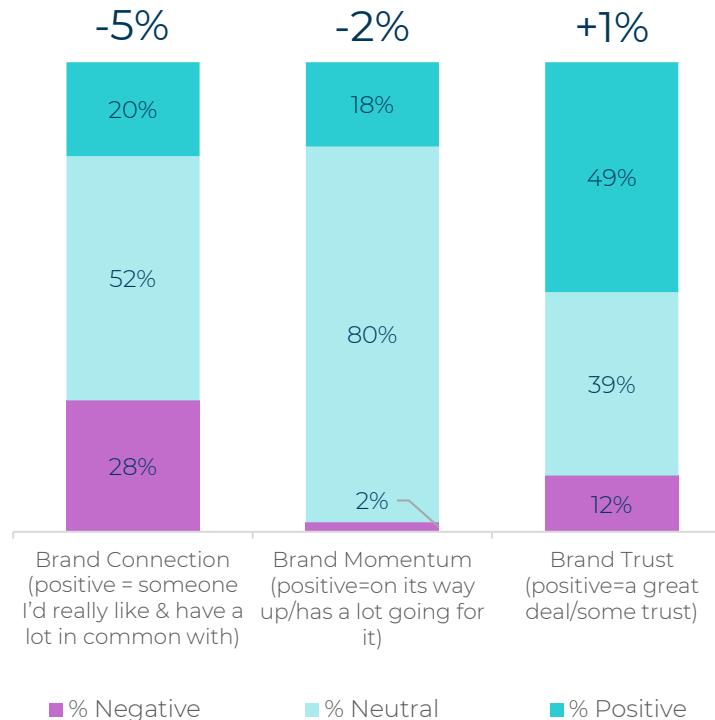
Severn Trent Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Severn Trent Water in relation to Connection, Momentum & Trust



% Who agree that Severn Trent Water...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

Perception	Percentage	+/- Difference vs. Current Industry Average
Deliver great service for all customers	44%	+ 2%
Improves our rivers	12%	- 9%
Creates a greener future	30%	+ 6%
Spends customers' money wisely	14%	- 5%
Contributes to our communities	14%	-13%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Attribute	Percentage	+/- Difference vs. Current Industry Average
Overall Satisfaction	48%	-4%
Colour & Appearance	76%	-6%
Taste & Smell	68%	-7%
Safety of Drinking Water	76%	-1%
Reliability of Supply	86%	-1%
Water Pressure	72%	-5%

Sewerage

Attribute	Percentage	+/- Difference vs. Current Industry Average
Overall Satisfaction	44%	-7%
Reducing smells from sewage treatment works	26%	-5%
Maintenance of sewerage pipes and treatment works	34%	-1%
Cleaning wastewater properly before release back into environment	32%	2%
Minimising sewer flooding	34%	4%

Very high levels of neutrality – particularly in relation to brand momentum – suggest a very strong opportunity for Severn Trent Water to raise their profile in the minds of customers.

Active Community members
Total Base Size: 796
Severn Trent Base Size: 50



Severn Trent Water: Spotlight Findings

Severn Trent Water customers value safe, high-quality drinking water and see this as a number 1 priority, followed by upgrading for a reliable supply and reducing leaks. Reducing the amount of wastewater entering the environment is also a top priority.

Ranking Customer Priorities

% Very Important

Water

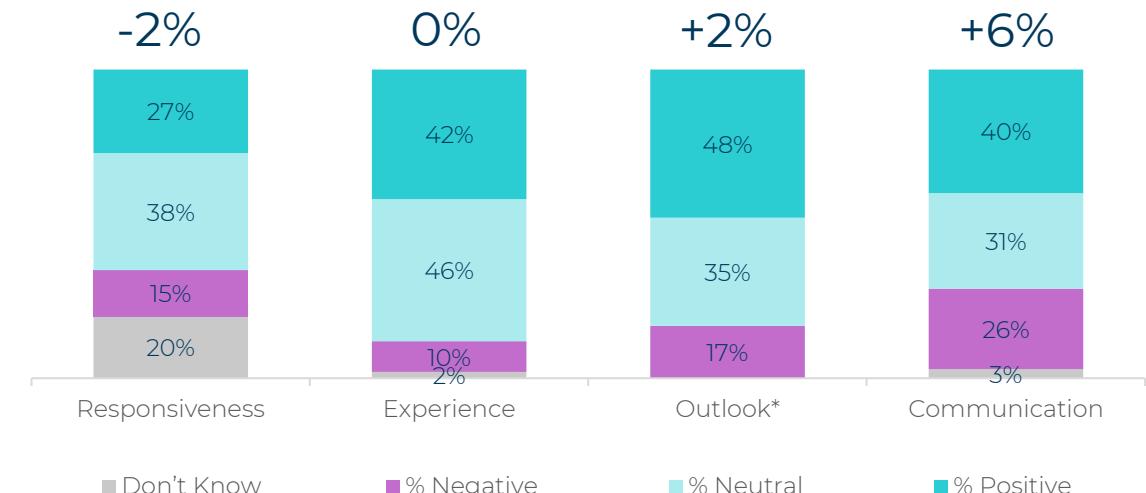
1. Safe drinking water: 98%
2. Upgrading water mains and pipes for a reliable supply: 69%
3. Reducing leaks: 63%

Sewerage

1. Reducing the amount of wastewater entering the environment: 98%
2. Reducing smells from sewage treatment works: 69%
3. Maintenance of sewerage pipes and treatment works: 63%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Severn Trent Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Communication is good and other metrics are on parity with the industry average. There is an opportunity to leverage communication channels in line with customer priorities: safe drinking water & reduced wastewater entering the environment.

Active Community members
Total Base Size: 796
Severn Trent Base Size: 50



Severn Trent Water: Spotlight Findings

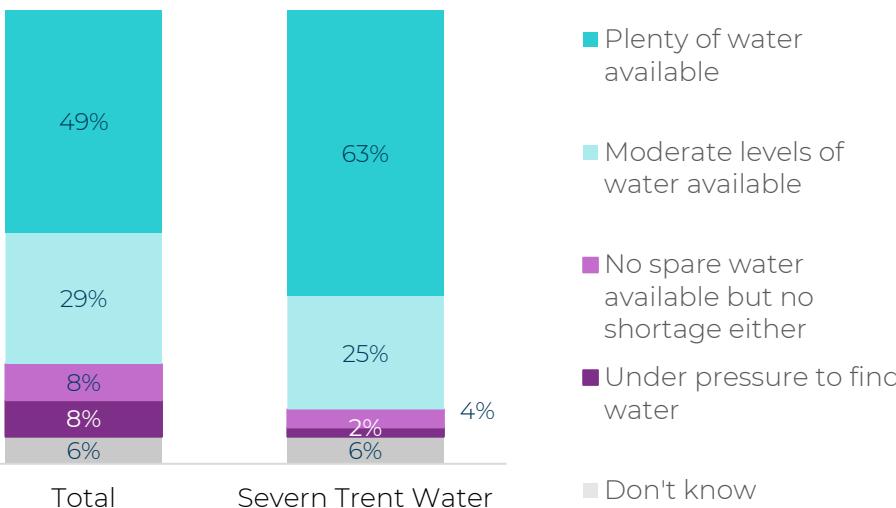
Processes & Resources



Water Resources

Severn Trent customers are more likely to believe that there is plenty of water available and less likely to think that there is any water scarcity where they live.

Perceived Water Availability



Water Process

52% of consumers say they know a lot or a little about the water process (+1%)

48% don't know much or know nothing about it (-1%)

Sewerage Process

56% of consumers say they know a lot or a little about the wastewater process (+8%)

44% don't know much or know nothing about it (-8%)

"The treatment procedure is much more detailed than I first thought but I would like more information as to how the water companies are dealing with contamination that is going into our rivers as this has had a detrimental affect on the wildlife that inhabits these waters

Female, 73, Lives Alone, Severn Trent Water

Perceptions of water availability are positive but is likely driven by low awareness of processes/reality of how much water there is. There is an opportunity to educate customers on the realities of water processing and scarcity in the region.

Active Community members
Total Base Size: 796
Severn Trent Base Size: 50



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

**South West Water (inc. Bristol Water
and Bournemouth Water)**

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

South West Water (inc. Bristol Water and Bournemouth Water)

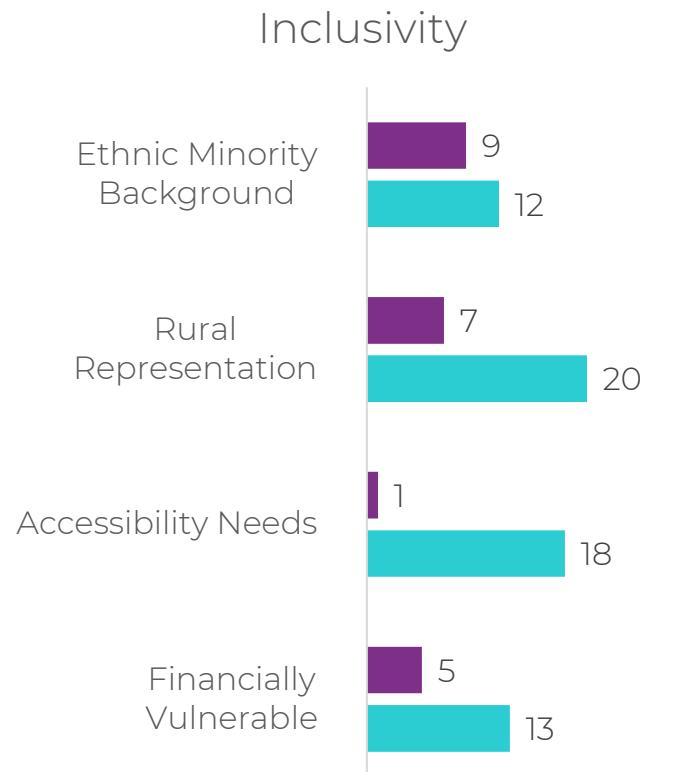
Community population



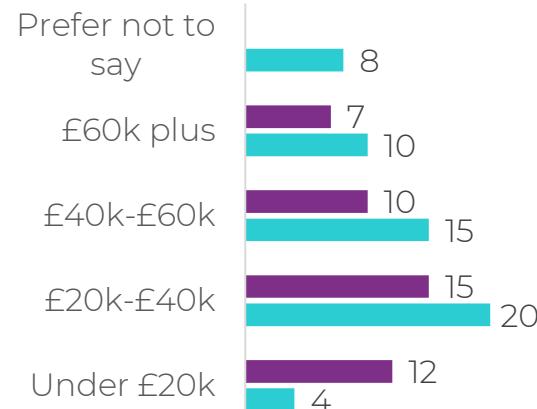
South West Water Community members : n=18

Bristol Water Community members: n=31

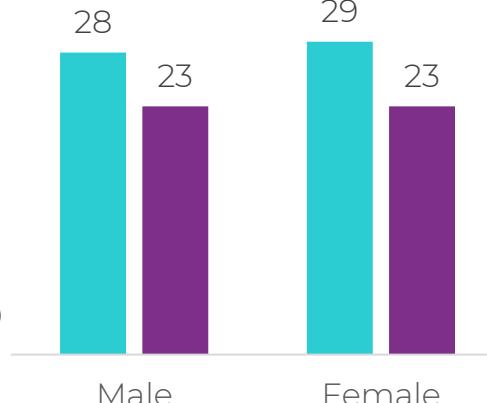
Bournemouth Water Community members: n= 8



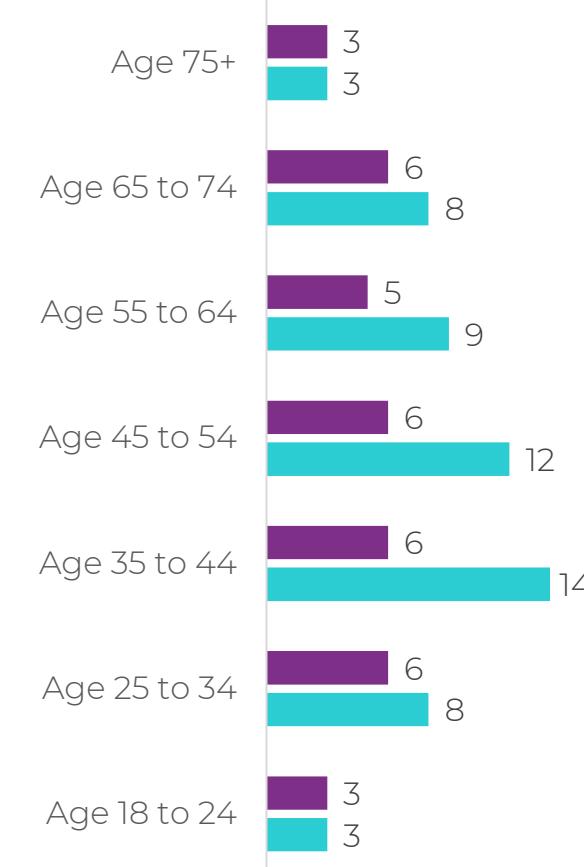
Household income



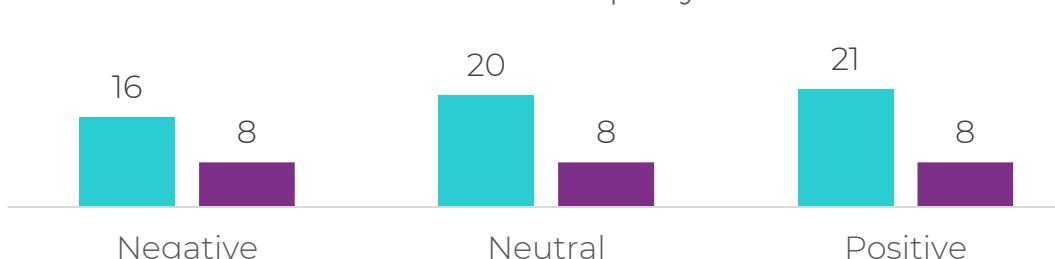
Gender



Age



Attitude to Water company



Sample note: We have met 100% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs.

Current Quota

Minimum Quota

Dashboard Summary



The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	South West Water including Bristol Water and Bournemouth Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	22%	-7%
	Recent Experience (Positive recent experience)	42%	37%	-5%
	General outlook (Positive outlook)	46%	35%	-11%
	Communication (Fair/good communication)	34%	29%	-5%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	23%	-2%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	16%	-4%
	Trust (a great deal/some trust)	48%	41%	-7%
	Past 4 Week Interaction	39%	30%	-9%
	Past 4 Week Disruption	5%	2%	-3%
	Past 4 Week Water Quality Issues	7%	9%	2%
	Past 4 Week Sewerage issues	2%	4%	2%
	Overall Value for Money	40%	35%	-5%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	51%	-1%
	Colour & Appearance	82%	79%	-3%
	Taste & Smell	75%	82%	7%
	Safety of Drinking Water	77%	75%	-2%
	Reliability of Supply	87%	86%	-1%
	Water Pressure	77%	72%	-5%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	51%	0%
	Reducing smells from sewage treatment works	31%	25%	-6%
	Maintenance of sewerage pipes and treatment works	35%	30%	-5%
	Cleaning wastewater properly before release back into environment	30%	27%	-3%
	Minimising sewer flooding	30%	25%	-5%

KEY:
% difference +10% above Average
% difference -10% below Average

Active Community members
 Total Base Size: 796
 South West Water including Bristol Water and Bournemouth Water
 Base Size: 57

Executive Summary

Overview of Key Findings

Barometer



- More negative value for money perceptions suggests a strong opportunity to improve through clearer, more proactive communication about where investment is being spent.
- South West Water is performing marginally lower than the industry average across most measures, but more significantly on trust. This is likely being driven by perceptions of the company across different tangible attributes relating to water and sewage (appearance, taste, sewerage smells), as well as negative perceptions of water management. There is a clear opportunity to challenge this through improved communication.

Spotlight



- There are clear opportunities for South West Water to improve customer experiences and general outlook, which are currently lagging behind the current industry average.
- South West Water have an opportunity to improve knowledge and awareness of customers. This will likely help to improve overall trust in the company.



As a customer, overall, how satisfied are you with South West Water ?

5.92/10 vs 6.26/10 (total)

Why do South West Water customers feel this way?

Customer sentiment is split. Many report reliable, good water quality and good support when needed. But this is contrasted with negative perceptions of value for money and some frustration with sewage discharge into rivers, leak repairs, and lack of communication & visibility over future improvement.



Accountability call out: There are currently **no ad-hoc accountability session triggers** in discussion across the surveys, community and CCW's external insights.

Active Community members

Total Base Size: 796

South West Water including Bristol Water and Bournemouth Water

Base Size: 57



South West Water: Barometer Findings

51% are satisfied with South West Water overall

16% are not satisfied

Overall Satisfaction - Water



35% are satisfied with value for money

28% are not satisfied

Overall Value for Money Satisfaction

Overall satisfaction is in line with average industry scores but value for money satisfaction is lower, and dissatisfaction is considerably higher. Bristol Water receives some positive mentions directly – reliable, easy to deal with, and good quality.

Why have you given this overall satisfaction score on water?

"I am very satisfied with Bristol Water. The service is reliable, the water quality is excellent, and any issues are usually resolved quickly"

*Male, 47,
lives with family, 10/10
satisfaction score*

"My main gripe is that sewage is being flushed into our local Stour River; endangering wildlife and making it smell disgusting at certain times of the year."

*Female, 67, lives alone, 5/10
satisfaction score*

"SWW are truly awful. Incorrect bills, sewage into the sea at Exmouth, Diseases in the water supply over the summer creating EEEF loss for tourism in Devon"

*Female, 44, lives with partner/spouse, 0/10
satisfaction score*

More negative value for money perceptions suggests a strong opportunity to improve through clearer, more proactive communication on where investment is being spent.

Active Community members
Total Base Size: 796
South West Water including Bristol Water and Bournemouth Water
Base Size: 57

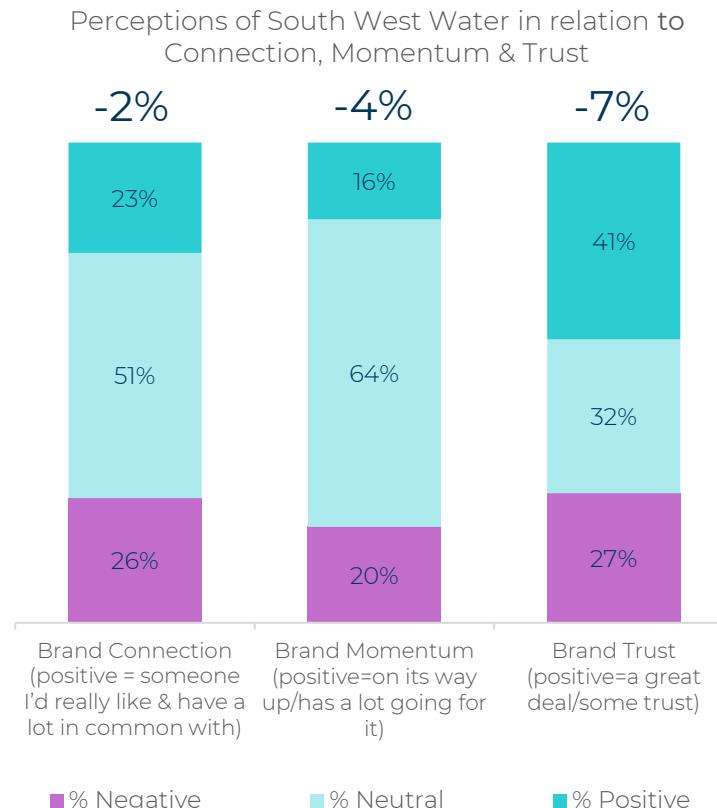


South West Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average



% Who agree that South West Water ...	+/- difference vs. Current Industry Average
Deliver great service for all customers	46% + 4%
Improves our rivers	14% -7%
Creates a greener future	22% -2%
Spends customers' money wisely	19% 0%
Contributes to our communities	30% +3%

% Satisfied with...	+/- difference vs. Current Industry Average
Water	
Overall Satisfaction	51% -1%
Colour & Appearance	79% -3%
Taste & Smell	82% +7%
Safety of Drinking Water	75% -2%
Reliability of Supply	86% -1%
Water Pressure	72% -5%
Sewerage	
Overall Satisfaction	51% 0%
Reducing smells from sewage treatment works	25% -6%
Maintenance of sewerage pipes and treatment works	30% -5%
Cleaning wastewater properly before release back into environment	27% -3%
Minimising sewer flooding	25% -5%

South West Water is performing marginally lower than the industry average, but more so on trust. This is likely being driven by perceptions of the company across different tangible attributes relating to water and sewerage (appearance, taste, sewerage smells), as well as negative perceptions of water management. There is a clear opportunity to challenge this through improved communication.

Active Community members
Total Base Size: 796
South West Water including Bristol Water and Bournemouth Water
Base Size: 57



South West Water: Spotlight Findings

South West Water customers value safe, high-quality drinking water and see this as a number 1 priority. Whilst sewage importance tracks in line with the average, customers place much more importance than average on reducing smells from sewage treatment works.

Ranking Customer Priorities

% Very Important

Water

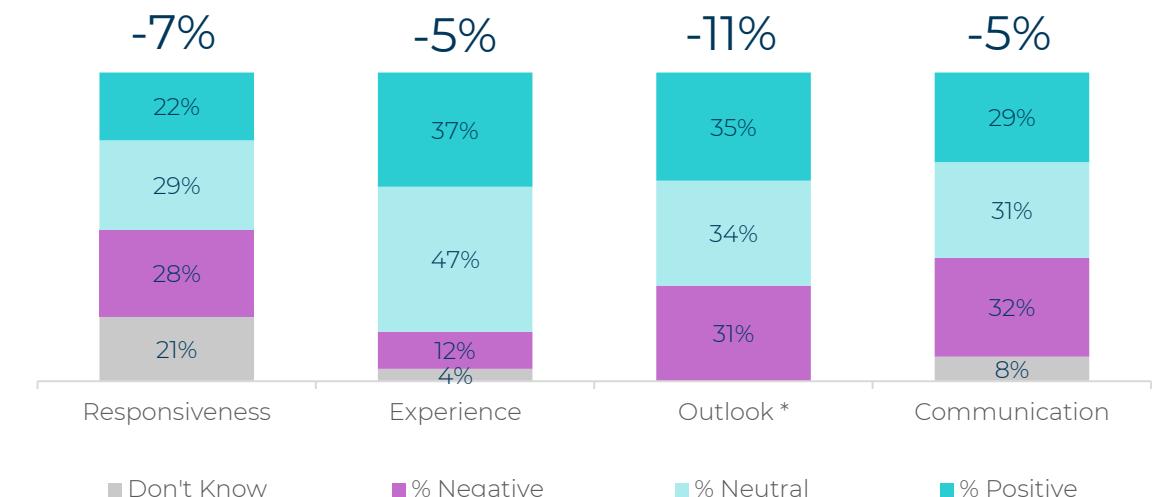
1. Safe drinking water: 92%
2. Reducing leaks: 76%
3. Upgrading water mains and pipes for a reliable supply: 65%

Sewerage

1. Reducing the amount of wastewater entering the environment: 92%
2. Maintenance of sewerage pipes and treatment works: 76%
3. Reducing smells from sewage treatment works: 65%

+/- difference (positive) vs. Current Industry Average

Perceptions of South West Water in relation to Responsiveness, Experience, Outlook and Communication



*Which statement best describes your general outlook on {water company}

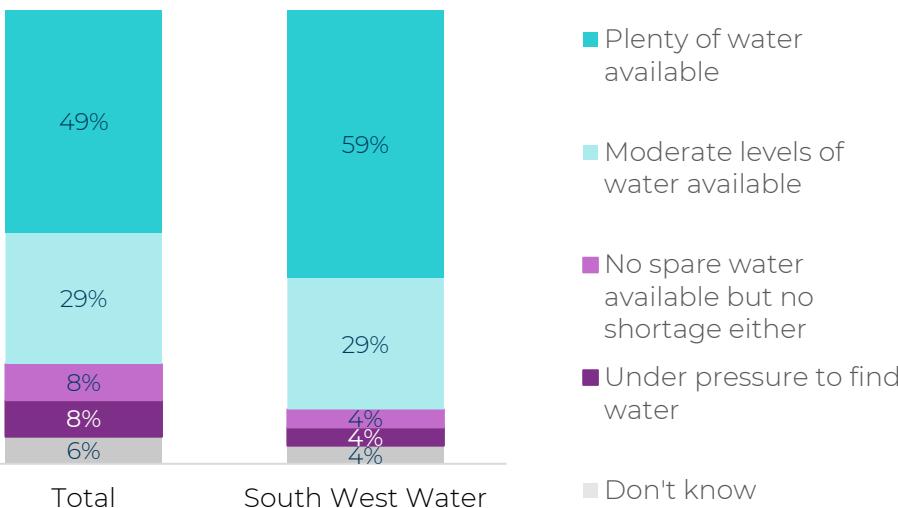
There are clear opportunities for South West Water to improve customer experiences and general outlook which are currently lagging behind the current industry average.

Active Community members
Total Base Size: 796
South West Water including Bristol Water and Bournemouth Water
Base Size: 57

Water Resources

South West Water customers are more likely to think there is plenty/moderate levels of water available in their area. But they have lower stated knowledge of the water process where they live.

Perceived Water Availability



Water Process

41% of consumers say they know a lot or a little about the water process (-10%)

59% don't know much or know nothing about it (+10%)

Sewerage Process

45% of consumers say they know a lot or a little about the wastewater process (-3%)

55% don't know much or know nothing about it (+3%)

"It seems quite efficient, but it isn't well communicated."

Male, 43, Young Family, South West Water Customer

South West Water have an opportunity to improve knowledge and awareness of customers. This will likely help to improve overall trust in the company.

Active Community members
Total Base Size: 796
South West Water including Bristol Water and Bournemouth Water Base Size: 57



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Southern Water

November 2025

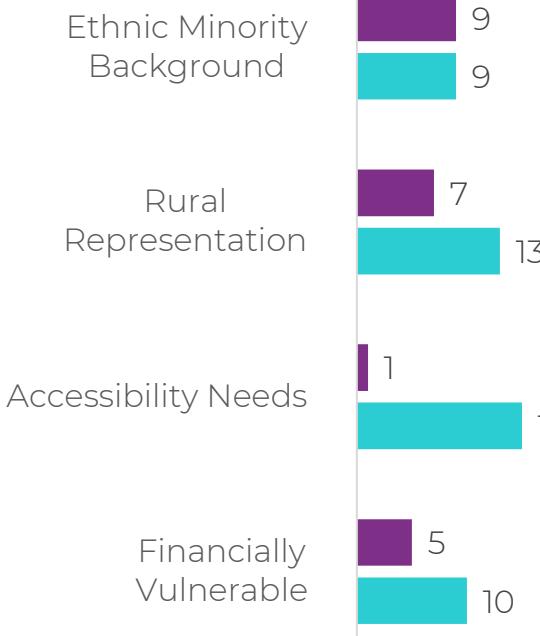
Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

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Southern Water Community members: n=53

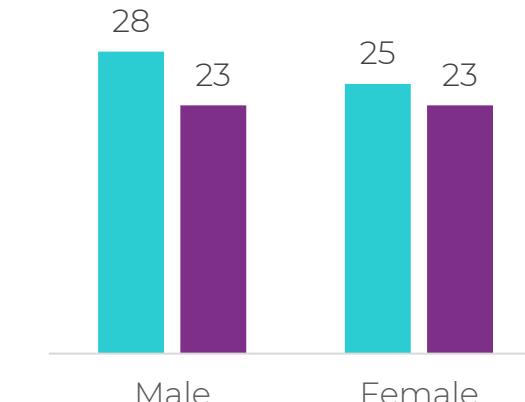
Inclusivity



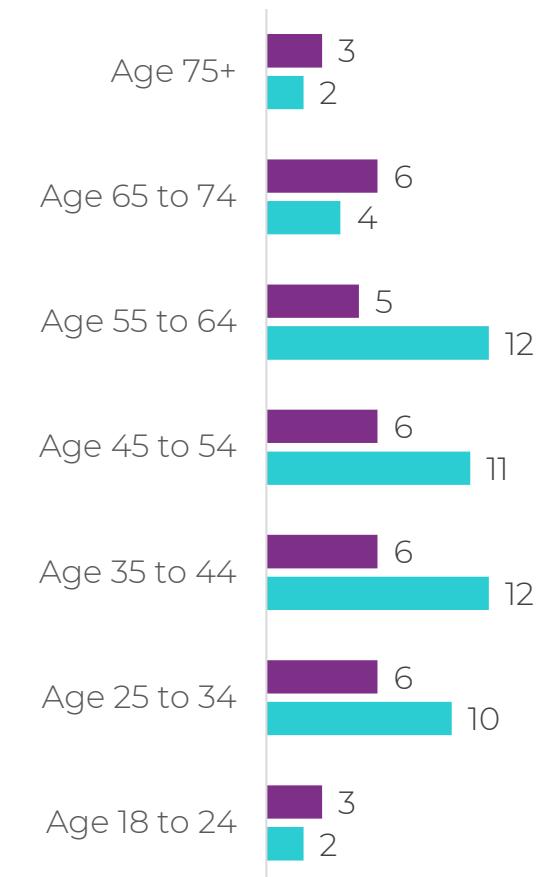
Household income



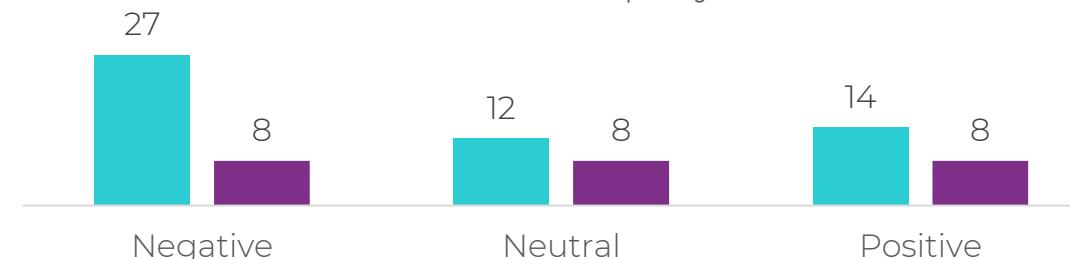
Gender



Age



Attitude to Water company



Sample note: We have met 90% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are slightly lower in our youngest & oldest age brackets within this community; this is due to 2 last minute drop-outs in these categories when closing the survey. We are currently working on boosting the sample in these age categories for next month.

Current Quota

Minimum Quota

Dashboard Summary



The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	Southern Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	24%	-5%
	Recent Experience (Positive recent experience)	42%	22%	-20%
	General outlook (Positive outlook)	46%	20%	-26%
	Communication (Fair/good communication)	34%	30%	-4%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	9%	-16%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	14%	-6%
	Trust (a great deal/some trust)	48%	20%	-28%
	Past 4 Week Interaction	39%	57%	18%
	Past 4 Week Disruption	5%	4%	-1%
	Past 4 Week Water Quality Issues	7%	2%	-5%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	15%	-25%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	23%	-29%
	Colour & Appearance	82%	83%	1%
	Taste & Smell	75%	64%	-11%
	Safety of Drinking Water	77%	72%	-5%
	Reliability of Supply	87%	83%	-4%
	Water Pressure	77%	81%	4%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	40%	-11%
	Reducing smells from sewage treatment works	31%	25%	-6%
	Maintenance of sewerage pipes and treatment works	35%	20%	-15%
	Cleaning wastewater properly before release back into environment	30%	18%	-12%
	Minimising sewer flooding	30%	18%	-12%

KEY:
% difference +10% above Average
% difference -10% below Average

Active Community members
 Total Base Size: 796
 Southern Water
 Base Size: 53

Executive Summary

Overview of Key Findings

Barometer

- Satisfaction is low and there are clear opportunities to address some fundamental challenges with the service provided, as well as improve perceptions of the company overall.
- Southern Water score poorly on water satisfaction metrics, which is impacting general perceptions of the company. Clear opportunities to address service issues/perception.

Spotlight

- Experience & Outlook are considerably poorer than the industry average, with sewerage a priority. Opportunities to address issues driving poor scores.
- The complexity of the water/sewerage process is generally unknown. There is a strong opportunity for Southern Water to help educate customers on the process and help build trust by demonstrating the amount of work involved in the process.



As a customer, overall, how satisfied are you with Southern Water?

4.49/10 vs 6.26/10 (total)

Why do Southern Water water customers feel this way?

Customers say that bills have increased whilst service feels like it has not improved. Trust has been damaged by sewage/storm overflows, pollution to rivers and disruptive leaks. There are references made to lack of investment in favour of exec pay/profit. But a small group does mention supply reliability and a general sense of future improvement.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
Total Base Size: 796
Southern Water Base Size: 53



Southern Water: Barometer Findings

23% are satisfied with Southern Water overall
38% are not satisfied

Overall Satisfaction - Water



Satisfaction is considerably lower than the current industry average, with just under 40% not satisfied. Almost half of customers are also not satisfied with value for money.

Why have you given this overall satisfaction score on water?

"It feels like SW are fulfilling their legal obligations but no more"

*Male, 56,
Lives with partner/spouse & children, Southern Water, 5/10
satisfaction score*

"They have prioritised shareholders profit over looking after the environment and fixing the infrastructure. They are polluting the seas and rivers, the sea I swim in has so many sewage dumps"

*Female, 54, Lives alone,
Southern Water, 0/10
satisfaction score*

"Prices are going up and up, as we pay for all the work they should have been doing for decades instead of payout of dividends to investors."

*Male, 54, Lives with partner/spouse & children,
Southern Water, 6/10
satisfaction score*

Satisfaction is low and there are clear opportunities to address some fundamental challenges with the service provided, as well as improve perceptions of the company overall.

Active Community members
Total Base Size: 796
Southern Water Base Size: 53



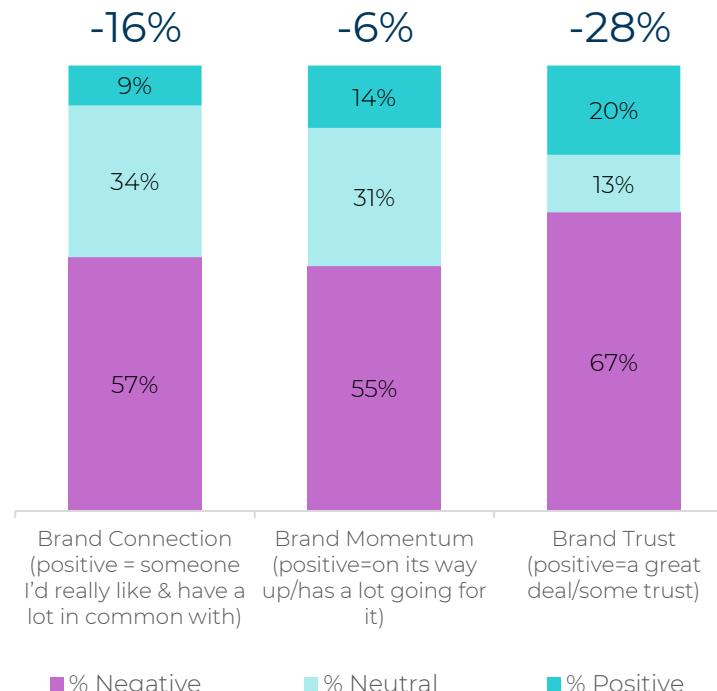
Southern Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Southern Water in relation to Connection, Momentum & Trust



% Who agree that Southern Water...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

Deliver great service for all customers	21%	- 21%
Improves our rivers	6%	- 15%
Creates a greener future	9%	- 15%
Spends customers' money wisely	8%	- 11%
Contributes to our communities	17%	- 10%

% Satisfied with...

Water

Overall Satisfaction	23%	- 29%
Colour & Appearance	83%	+ 1%
Taste & Smell	64%	- 11%
Safety of Drinking Water	72%	- 5%
Reliability of Supply	83%	- 4%
Water Pressure	81%	4%

Sewerage

Overall Satisfaction	40%	- 11%
Reducing smells from sewage treatment works	25%	- 6%
Maintenance of sewerage pipes and treatment works	20%	- 15%
Cleaning wastewater properly before release back into environment	18%	- 12%
Minimising sewer flooding	18%	- 12%

Southern Water score poorly on almost all water satisfaction metrics, which is impacting general perceptions of the company. Clear opportunities to address service issues/perception.

Active Community members
Total Base Size: 796
Southern Water Base Size: 53



Southern Water: Spotlight Findings

Southern Water customers value safe, high-quality drinking water and see this as a number 1 priority. In line with comments about sewage and the environment, customers place a greater importance on all sewerage attributes, but particularly on reducing the amount of wastewater entering the environment.

Ranking Customer Priorities

% Very Important

Water

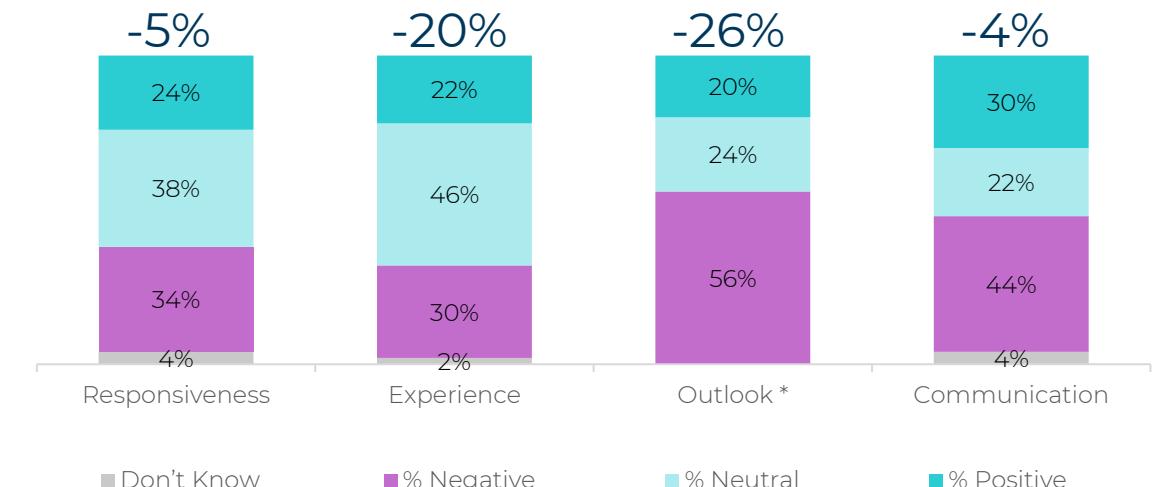
1. Safe drinking water: 98%
2. Reducing leaks: 84%
3. Upgrading water mains and pipes for a reliable supply: 80%

Sewerage

1. Reducing the amount of wastewater entering the environment: 98%
2. Maintenance of sewerage pipes and treatment works: 84%
3. Reducing smells from sewage treatment works: 80%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Southern Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Experience & Outlook are considerably poorer than the industry average, with sewerage a priority. Opportunities to address issues driving poor scores.

Active Community members
Total Base Size: 796
Southern Water Base Size: 53



Southern Water: Spotlight Findings

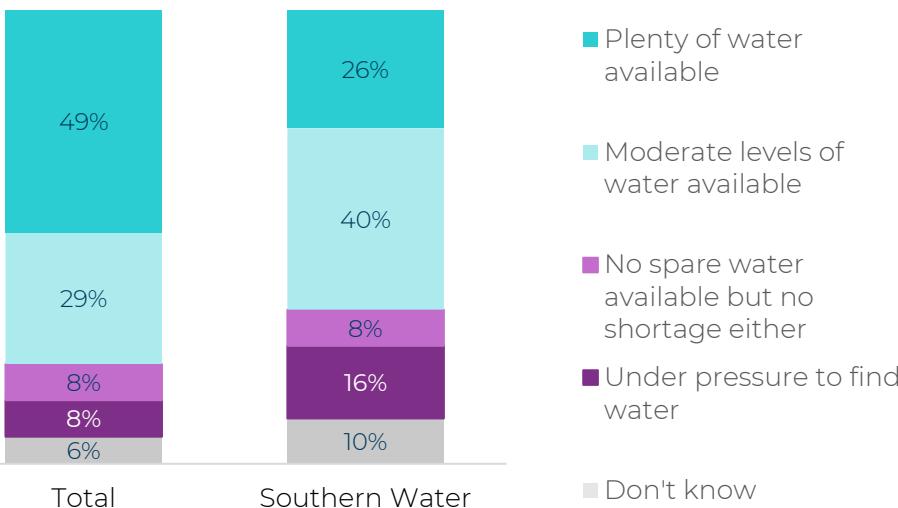
Processes & Resources



Water Resources

Southern Water customers are much less likely to think there is plenty of water available in their area. As a community they are around average when it comes to stated knowledge of water and sewerage processes.

Perceived Water Availability



Water Process

48% of consumers say they know a lot or a little about the water process (-3%)

52% don't know much or know nothing about it (+3%)

Sewerage Process

50% of consumers say they know a lot or a little about the wastewater process (+2%)

50% don't know much or know nothing about it (-2%)

"It's more complex than I had previously realised. Maybe the water companies could publicise (even more than already do) the dangers to our water systems by so many people trying to flush unsuitable objects down toilets or down kitchen sinks.

Male, 57, Lives alone, Southern Water Customer

The complexity of the water/sewerage process is generally unknown. There is a strong opportunity for Southern Water to help educate customers on the process and help build trust by demonstrating the amount of work involved in the process.

Active Community members
Total Base Size: 796
Southern Water Base Size: 53



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Thames Water

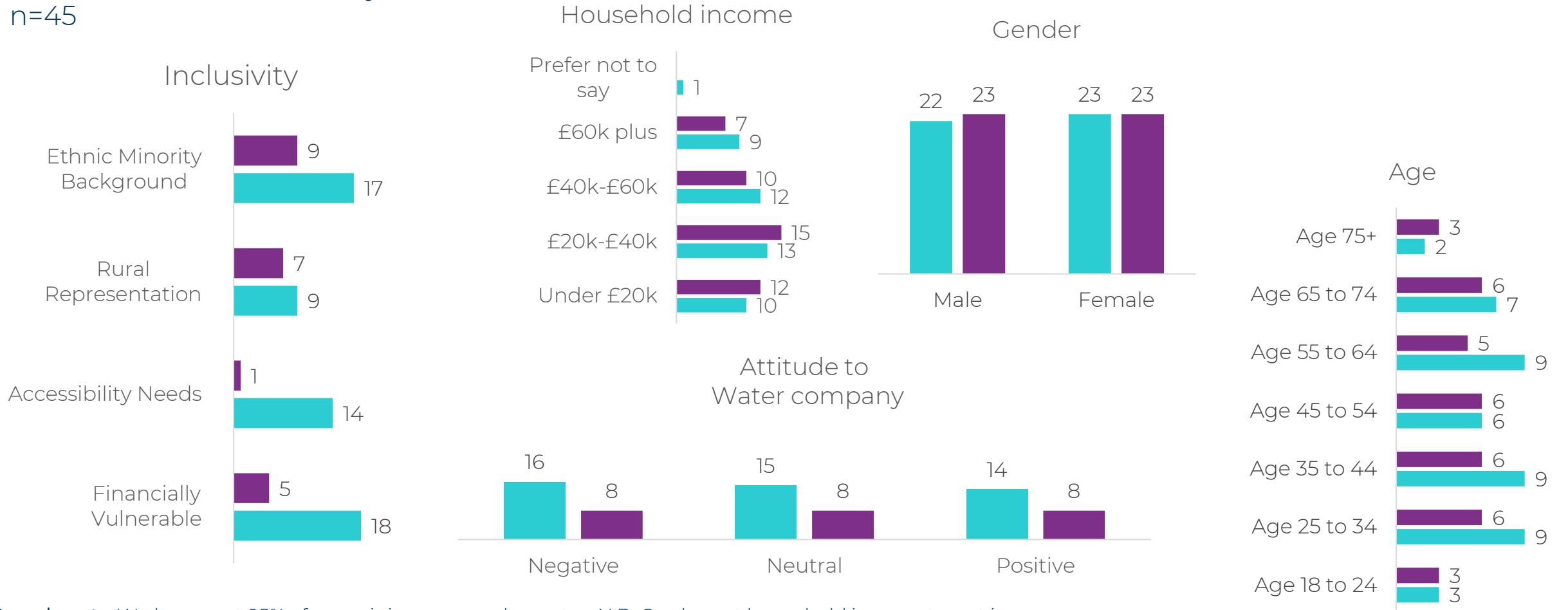
November 2025

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Research & Energy Saving Trust

Version: Final copy 15.12.25

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Thames Water Community members: n=45



Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 75+ sample by at least 1 for next month.

 Current Quota  Minimum Quota

Dashboard Summary



The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	Thames Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	25%	-4%
	Recent Experience (Positive recent experience)	42%	33%	-9%
	General outlook (Positive outlook)	46%	31%	-15%
	Communication (Fair/good communication)	34%	33%	-1%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	18%	-7%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	6%	-14%
	Trust (a great deal/some trust)	48%	46%	-2%
	Past 4 Week Interaction	39%	42%	+3%
	Past 4 Week Disruption	5%	4%	-1%
	Past 4 Week Water Quality Issues	7%	8%	+1%
	Past 4 Week Sewerage issues	2%	0%	-2%
	Overall Value for Money	40%	33%	-7%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	38%	-14%
	Colour & Appearance	82%	73%	-9%
	Taste & Smell	75%	62%	-13%
	Safety of Drinking Water	77%	62%	-15%
	Reliability of Supply	87%	84%	-3%
	Water Pressure	77%	73%	-4%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	51%	+0%
	Reducing smells from sewage treatment works	31%	33%	+2%
	Maintenance of sewerage pipes and treatment works	35%	46%	+11%
	Cleaning wastewater properly before release back into environment	30%	37%	+7%
	Minimising sewer flooding	30%	33%	+3%

KEY:
% difference +10% above Average
% difference -10% below Average

Active Community members n= 796
 Thames Water Community members n=45.

Executive Summary

Overview of Key Findings

Barometer



- Overall satisfaction is low and driven by water quality / supply experiences, but also by wider perceptions of poor governance and lack of investment in the future.
- Thames Water has lower brand scores than the industry average. Momentum (salience) is the key challenge, and the brand has a strong opportunity to address current negative perceptions.

Spotlight



- Overall outlook is mixed for customers, but Thames Water has lower positive scores than the industry average. The importance placed on reducing wastewater entering the environment suggests that there are opportunities to inform customers of the work being done in this area.
- There is an appetite for greater knowledge about how the water system works, presenting a good opportunity for Thames Water to actively engage customers.



As a customer, overall, how satisfied are you with Thames Water?

5.40/10 vs 6.26/10 (total)

Why do Thames Water customers feel this way?

Day-to-day supply is described as reliable with some mentions of helpful support and quick fixes were relevant. However, there is considerable negative sentiment, typically driven by high bills, leaks & difficulty getting responses to complaints. Company finances and governance is also driving negative scores.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
Total Base Size: 796
Thames Water Base Size: 45



Thames Water: Barometer Findings

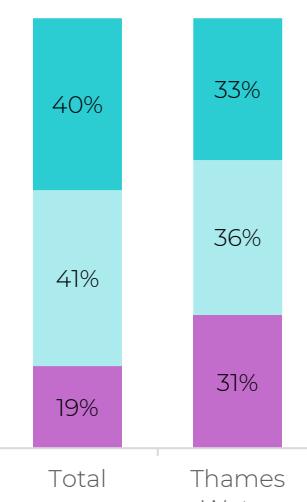
38% are satisfied with Thames Water overall
29% are not satisfied

Overall Satisfaction - Water



33% are satisfied with value for money
31% are not satisfied

Overall Value for Money Satisfaction



Satisfaction is below industry average and dissatisfaction is higher, both generally and in relation to value for money.

Why have you given this overall satisfaction score on water?

“Good service, consistent, with few incidences”

*Male, 48,
Lives with partner/spouse & children, Thames Water, 8/10 satisfaction score*

“Service is good but appalled by payments to shareholders at expense of investment in infrastructure and also concerned about TW role in pollution of streams, waterways and sea”

Female, 62, Lives alone, Thames Water, 6/10 satisfaction score

“Overpriced, too high dividends, and bonuses, underinvestment.”

Male, 55, Lives with partner/spouse, Thames Water, 0/10 satisfaction score

Overall satisfaction is low and driven by water quality / supply experiences, but also by wider perceptions of poor governance and lack of investment in the future.

Active Community members
Total Base Size: 796
Thames Water Base Size: 45



Thames Water: Barometer Findings

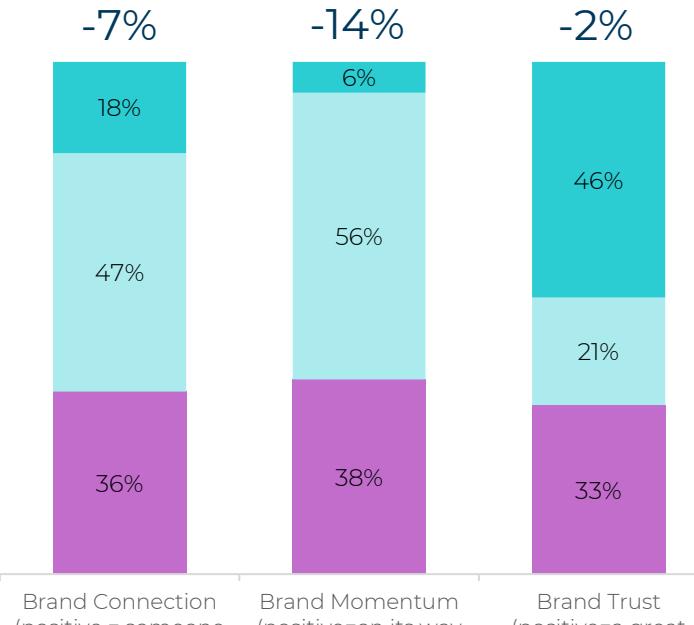
Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Thames Water in relation to

Connection, Momentum & Trust



Brand Connection
(positive = someone I'd really like & have a lot in common with)

Brand Momentum
(positive=on its way up/has a lot going for it)

Brand Trust
(positive=a great deal/some trust)

■ % Negative

■ % Neutral

■ % Positive

% Who agree that Thames Water...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

Perception	Value	+/- Difference
Deliver great service for all customers	40%	- 2%
Improves our rivers	22%	+ 1%
Creates a greener future	17%	- 7%
Spends customers' money wisely	18%	- 1%
Contributes to our communities	20%	- 7%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Service	Value	+/- Difference
Overall Satisfaction	38%	-14%
Colour & Appearance	73%	-9%
Taste & Smell	62%	-13%
Safety of Drinking Water	62%	-15%
Reliability of Supply	84%	-3%
Water Pressure	73%	-4%

Sewerage

Service	Value	+/- Difference
Overall Satisfaction	51%	0%
Reducing smells from sewage treatment works	33%	+ 2%
Maintenance of sewerage pipes and treatment works	46%	+11%
Cleaning wastewater properly before release back into environment	37%	+7%
Minimising sewer flooding	33%	+3%

Thames Water has lower brand scores than the industry average. Momentum (salience) is the key challenge, and the brand has a strong opportunity to address current negative perceptions.

Active Community members
Total Base Size: 796
Thames Water Base Size: 45



Thames Water: Spotlight Findings

Thames Water customers value safe, high-quality drinking water and see this as a number 1 priority. Reducing the amount of wastewater entering the environment was very important to all customers.

Ranking Customer Priorities

% Very Important

Water

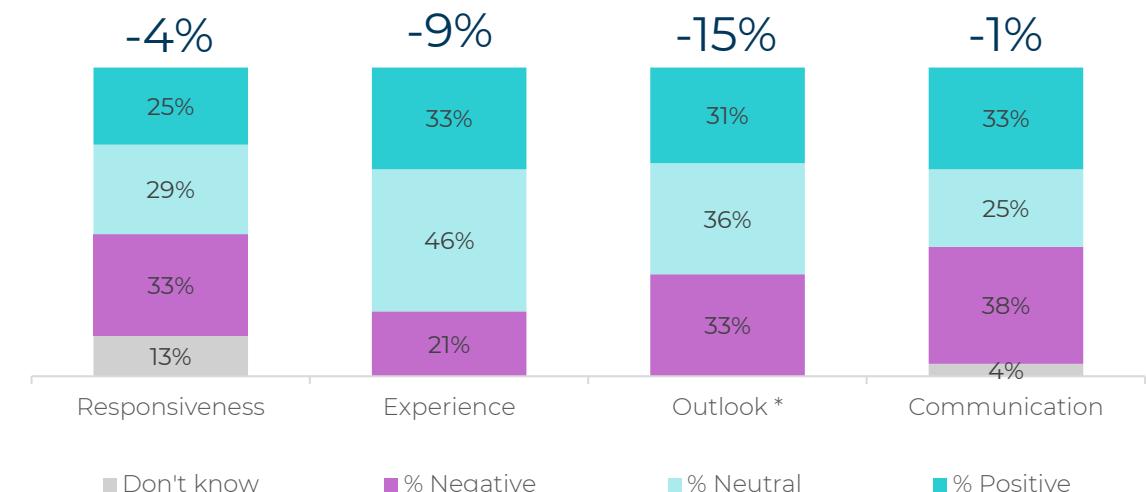
1. Safe drinking water: 83%
2. Reducing leaks: 71%
3. Improve water treatment processes: 69%

Sewerage

1. Reducing the amount of wastewater entering the environment: 83%
2. Maintenance of sewerage pipes and treatment works: 71%
3. Reducing smells from sewage treatment works: 65%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Thames Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Overall outlook is mixed for customers, but Thames Water has lower positive scores than the industry average. The importance placed on reducing wastewater entering the environment suggests that there are opportunities to inform customers of the work being done in this area.

Active Community members
Total Base Size: 796
Thames Water Base Size: 45



Thames Water: Spotlight Findings

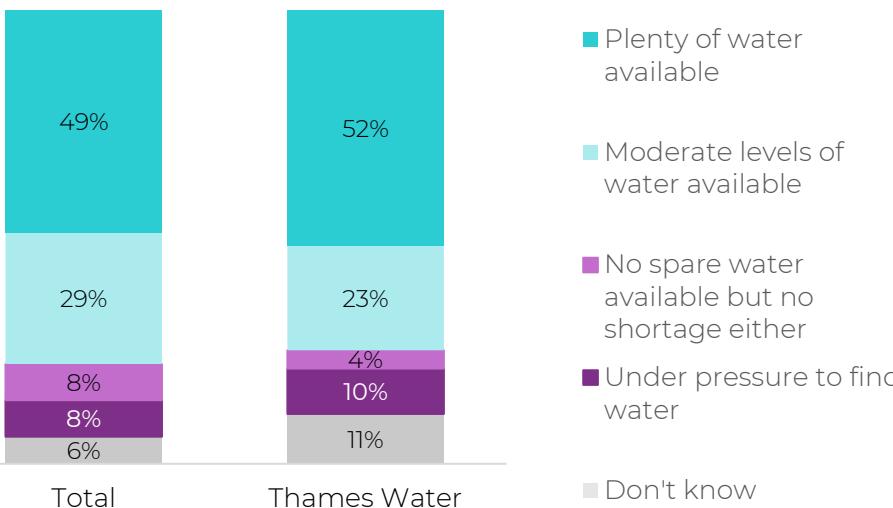
Processes & Resources



Water Resources

The majority of Thames Water customers believe there is plenty/moderate levels of water in their area. This is largely in line with the industry average. As a customer base, they are marginally more likely to state that they have an understanding of how the water process works.

Perceived Water Availability



Water Process

56% of consumers say they know a lot or a little about the water process (+5%)

44% don't know much or know nothing about it (-5%)

Sewerage Process

46% of consumers say they know a lot or a little about the wastewater process (-2%)

54% don't know much or know nothing about it (+2%)

"I have never been overly aware how our drinking water is cleaned/treated. I believe there should be more education for households on how our water is treated"

Female, 30, Young Family, Thames Water Customer

There is an appetite for greater knowledge about how the water system works, presenting a good opportunity for Thames Water to actively engage customers.

Active Community members
Total Base Size: 796
Thames Water Base Size: 45



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

United Utilities

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

United Utilities

Community population

United Utilities Community members:
n=54

Inclusivity

Ethnic Minority Background

Rural Representation

Accessibility Needs

Financially Vulnerable

Household income

Prefer not to say

£60k plus

£40k-£60k

£20k-£40k

Under £20k

Gender

Male

Female

Other

Age

Age 75+

Age 65 to 74

Age 55 to 64

Age 45 to 54

Age 35 to 44

Age 25 to 34

Age 18 to 24

Negative

Neutral

Positive

Attitude to Water company

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 75+ sample by at least 1 for next month.

Current Quota

Minimum Quota



Dashboard Summary



The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	United Utilities	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	35%	6%
	Recent Experience (Positive recent experience)	42%	50%	8%
	General outlook (Positive outlook)	46%	55%	9%
	Communication (Fair/good communication)	34%	38%	4%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	19%	-6%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	22%	2%
	Trust (a great deal/some trust)	48%	43%	-5%
	Past 4 Week Interaction	39%	39%	0%
	Past 4 Week Disruption	5%	2%	-3%
	Past 4 Week Water Quality Issues	7%	4%	-3%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	30%	-10%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	54%	2%
	Colour & Appearance	82%	80%	-2%
	Taste & Smell	75%	67%	-8%
	Safety of Drinking Water	77%	70%	-7%
	Reliability of Supply	87%	89%	2%
	Water Pressure	77%	74%	-3%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	52%	1%
	Reducing smells from sewage treatment works	31%	29%	-2%
	Maintenance of sewerage pipes and treatment works	35%	43%	8%
	Cleaning wastewater properly before release back into environment	30%	38%	8%
	Minimising sewer flooding	30%	34%	4%

KEY:
% difference +10%
above Average
% difference -10%
below Average

Active Community members n= 796
 United Utilities Community members n=54.

Executive Summary

Overview of Key Findings

Barometer

- Overall Satisfaction on Water is positive but there are opportunities to be more transparent about where money is being spent, to help challenge less positive perceptions of value for money.
- United Utilities are generally performing in line with the industry average. There is some positivity with regard to contributing to communities and some negativity around water colour & appearance.

Spotlight

- There is a lot of positivity when it comes to responsiveness, experience, outlook and communication. There are opportunities for United Utilities to continue to build on and leverage this sentiment.
- Perceptions of water availability is positive, but customers do not feel knowledgeable about how the water process works. There is an opportunity to educate customers, improving transparency, and potentially helping to increase value for money satisfaction.



As a customer, overall, how satisfied are you with United Utilities?

6.22/10 vs 6.26/10 (total)

Why do United Utilities customers feel this way?

Supply is reliable, quality of water is generally good and issues, where they arise, seem to be resolved quickly. High costs and mixed customer service experiences are driving negativity and perceptions of pollution, recurring leaks in some areas are leading to calls for greater transparency in how money is spent.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

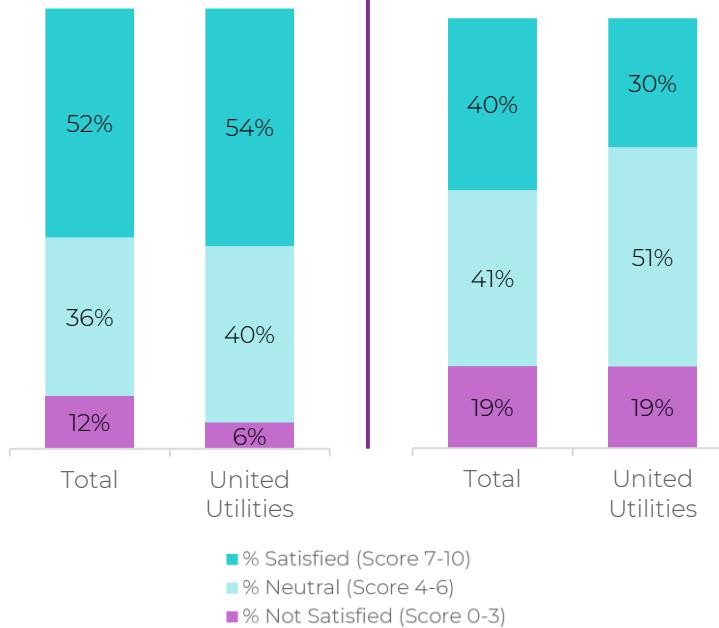
Active Community members
Total Base Size: 796
United Utilities Base Size: 54



United Utilities: Barometer Findings

54% are satisfied with United Utilities overall
6% are not satisfied

Overall Satisfaction - Water



30% are satisfied with value for money
19% are not satisfied

Overall Value for Money Satisfaction

Overall satisfaction is in line with the industry average but the % of customers saying they are dissatisfied is relatively low. However, the number of customers satisfied with value for money is lower.

Why have you given this overall satisfaction score on water?

"I am very satisfied with United Utilities. Water quality is good and there are very few supply interruptions."

*Male, 43,
Lives with partner/spouse & children, United Utilities, 9/10 satisfaction score*

"In terms of my direct contact with UU I'm usually very satisfied. However, I do find my bills are quite high and am keen to learn more about how my money is distributed"

Male, 55, Lives with partner/spouse & Children, United Utilities, 7/10 satisfaction score

"I don't believe they spend money to maintain and improve"

Female, 52, Lives with partner/spouse, United Utilities, 4/10 satisfaction score

Satisfaction is positive but there are opportunities to be more transparent about where money is being spent to help challenge less positive perceptions of value for money.

Active Community members
Total Base Size: 796
United Utilities Base Size: 54



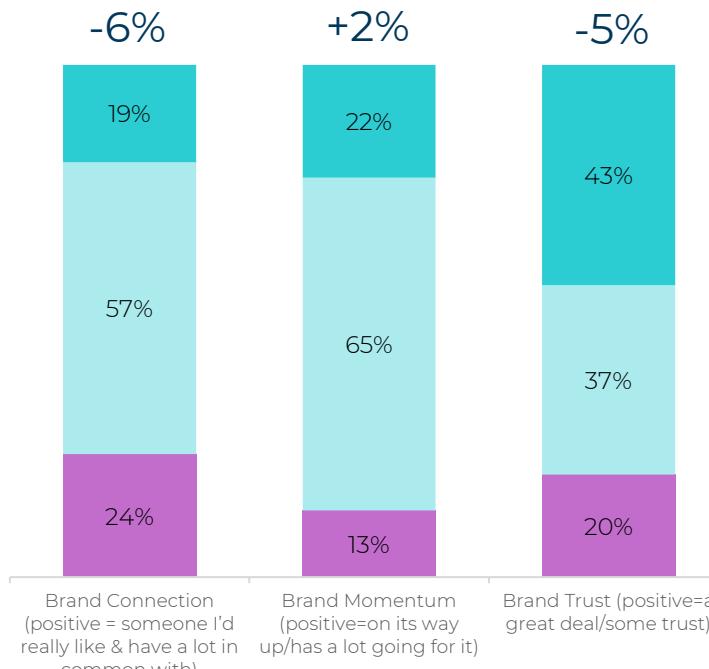
United Utilities: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of United Utilities in relation to
Connection, Momentum & Trust



Brand Connection
(positive = someone I'd
really like & have a lot in
common with)

Brand Momentum
(positive=on its way
up/has a lot going for it)

Brand Trust (positive=
great deal/some trust)

■ % Negative

■ % Neutral

■ % Positive

% Who agree that United Utilities...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

39%	- 3%
19%	- 2%
19%	- 5%
13%	- 6%
37%	+ 10%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Overall Satisfaction	54%	2%
Colour & Appearance	80%	-2%
Taste & Smell	67%	-8%
Safety of Drinking Water	70%	-7%
Reliability of Supply	89%	-2%
Water Pressure	74%	-3%

Sewerage

Overall Satisfaction	52%	1%
Reducing smells from sewage treatment works	29%	-2%
Maintenance of sewerage pipes and treatment works	43%	8%
Cleaning wastewater properly before release back into environment	38%	8%
Minimising sewer flooding	34%	4%

United Utilities are generally performing in line with the industry average. There is some positivity with regard to contributing to communities and some negativity around taste and smell.

Active Community members
Total Base Size: 796
United Utilities Base Size: 54



United Utilities: Spotlight Findings

United Utilities customers value safe, high-quality drinking water and see this as a number 1 priority. Reducing the amount of wastewater entering the environment is a key sewerage priority.

Ranking Customer Priorities

% Very Important

Water

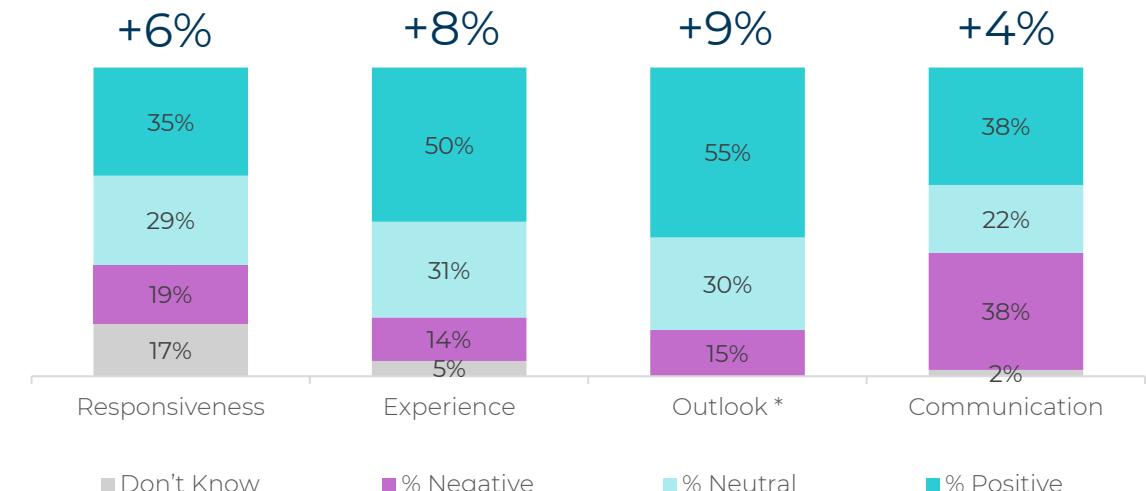
1. Safe drinking water: 100%
2. Upgrading water mains and pipes for a reliable supply: 77%
3. Reducing leaks: 73%

Sewerage

1. Reducing the amount of wastewater entering the environment: 100%
2. Reducing smells from sewage treatment works: 77%
3. Maintenance of sewerage pipes and treatment works: 73%

+/- Difference (positive) vs. Current Industry Average

Perceptions of United Utilities Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

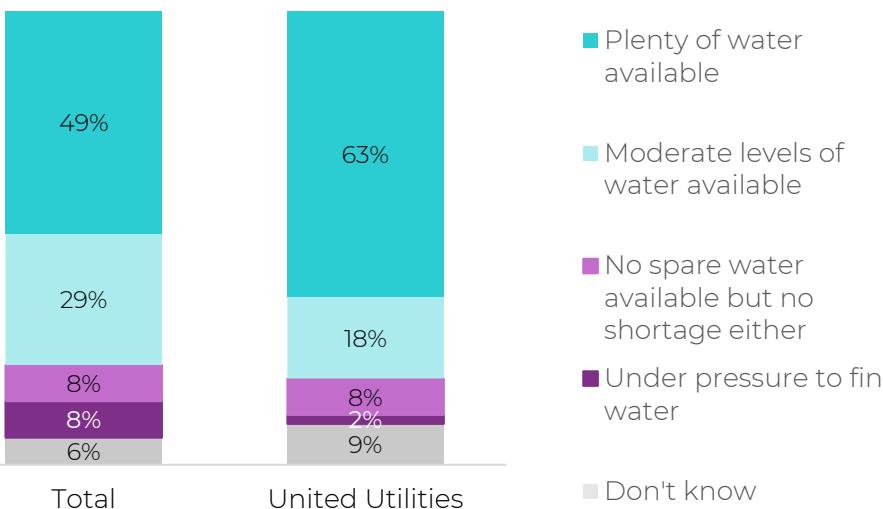
There is a lot of positivity when it comes to responsiveness, experience, outlook and communication. There are opportunities for United Utilities to continue to build on and leverage this sentiment.

Active Community members
Total Base Size: 796
United Utilities Base Size: 54

Water Resources

United Utilities customers are much more likely to think there is plenty/moderate levels of water available in their area. As a community they feel slightly less informed on the water treatment process, but more so about sewerage processes.

Perceived Water Availability



Water Process

40% of consumers say they know a lot or a little about the water process (-11%)

60% don't know much or know nothing about it (+11%)

Sewerage Process

38% of consumers say they know a lot or a little about the wastewater process (-10%)

62% don't know much or know nothing about it (+10%)

"I am grateful for the work that goes into treating water, but I would love it if the system felt more transparent and reliable in my daily life."

Male, 43, Young Family, United Utilities Customer

Perceptions of water availability are positive, but customers do not feel knowledgeable about how the water process works. There is an opportunity to educate customers, improving transparency, and potentially helping to increase value for money satisfaction.

Active Community members
Total Base Size: 796
United Utilities Base Size: 54



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Wessex Water

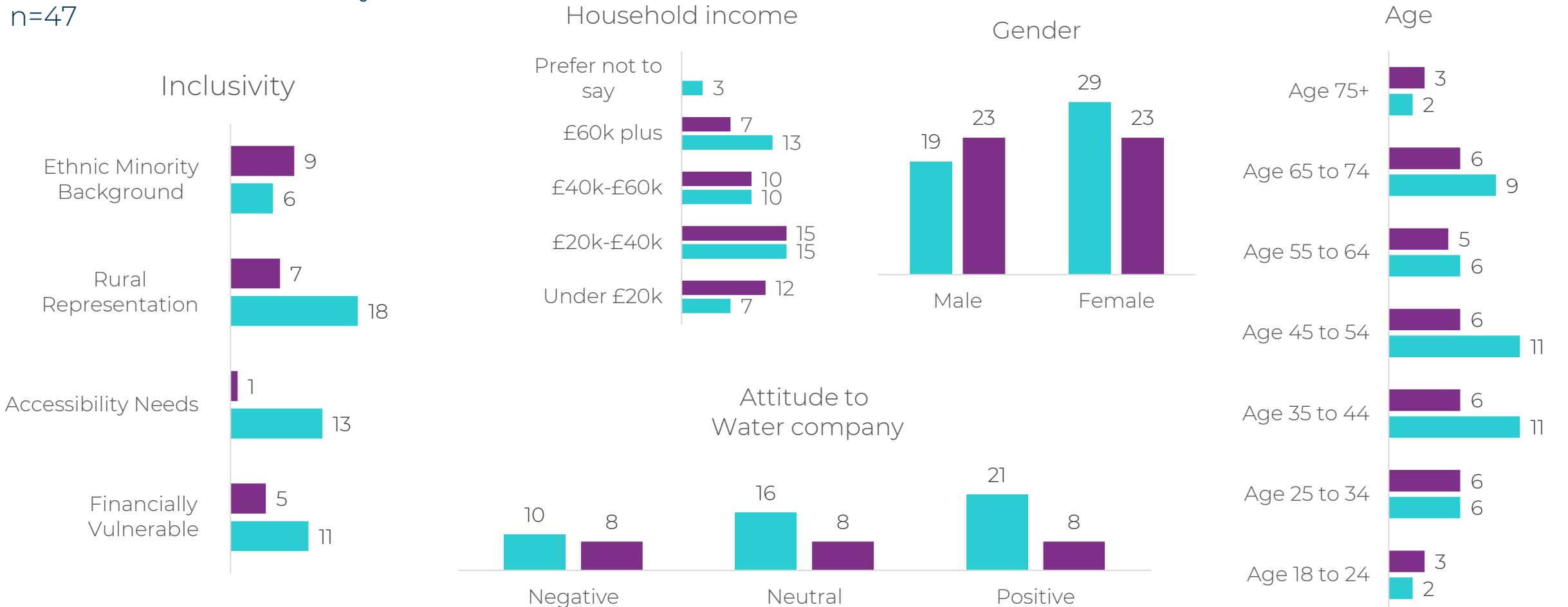
November 2025

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Research & Energy Saving Trust

Version: Final copy 15.12.25

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Wessex Water Community members: n=47



Sample note: We have met over 90% of our sample target quotas. We are currently working to boost our ethnic minority background quota within this community as we had a few members drop out at the last minute.

Current Quota Minimum Quota

Dashboard Summary



	Topic	Agreement % for total sample	Wessex Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	22%	-7%
	Recent Experience (Positive recent experience)	42%	46%	4%
	General outlook (Positive outlook)	46%	43%	-3%
	Communication (Fair/good communication)	34%	39%	5%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	24%	-1%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	8%	-12%
	Trust (a great deal/some trust)	48%	44%	-4%
	Past 4 Week Interaction	39%	31%	-8%
	Past 4 Week Disruption	5%	7%	2%
	Past 4 Week Water Quality Issues	7%	10%	3%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	36%	-4%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	40%	-12%
	Colour & Appearance	82%	86%	4%
	Taste & Smell	75%	79%	4%
	Safety of Drinking Water	77%	79%	2%
	Reliability of Supply	87%	88%	1%
	Water Pressure	77%	71%	-6%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	50%	-1%
	Reducing smells from sewage treatment works	31%	24%	-7%
	Maintenance of sewerage pipes and treatment works	35%	27%	-8%
	Cleaning wastewater properly before release back into environment	30%	16%	-14%
	Minimising sewer flooding	30%	13%	-17%

KEY:
 % difference +10% above Average
 % difference -10% below Average
 Active Community members n= 796
 Wessex Water Community members n=42.

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction levels are lower than average. There is an opportunity to communicate what Wessex Water is doing to address sewage spills and environmental impacts and show transparency surrounding costs.
- Wessex Water should inform customers about what they are doing to create a greener future and how they are spending money. This will help to build trust. Improving cleaning wastewater and minimising sewer flooding will help increase satisfaction scores.

Spotlight



- Communication and experience are performing above average. However, responsiveness and outlook are less positive. Wessex Water can do more to showcase how they are being responsive to public concerns.
- Wessex customers are less aware of both the water and sewerage processes than average. There is an opportunity to better inform customers of these processes.

As a customer, overall, how satisfied are you with Wessex Water?

6.06/10 vs 6.26/10 (total)

Why do Wessex Water customers feel this way?

Customers are generally satisfied with reliable supply and service but are increasingly concerned about sewage pollution, rising bills, limited investment, and overall trust in Wessex Water's environmental performance.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
Total Base Size: 796
Wessex Water Base Size: 42



Wessex Water: Barometer Findings

40% are satisfied with Wessex Water overall
12% are not satisfied

Overall Satisfaction - Water



Both overall satisfaction and value for money satisfaction are below average, with both being dominated with higher "neutral" scores. However, those who are "not satisfied" are lower than average for value for money.

Customers generally feel Wessex Water provides a reliable, good quality service, but there are concerns surrounding sewage spills, environmental impact and cost.

Why have you given this overall satisfaction score on water?

"They provide an uninterrupted service but I'm unsure how well they care about their customers."

*Female, 38,
Lives alone, Wessex Water, 5/10
satisfaction score*

"I have had no issues with this provider and any queries I've had have been answered quickly."

*Female, 41, Lives alone,
Wessex Water, 10/10
satisfaction score*

"I need to know more to give a better score. I hear a lot about sewage entering our waterways and it concerns me."

*Female, 39, Lives with
partner/spouse &
child/children, Wessex
Water, 6/10 satisfaction
score*

Satisfaction levels are lower than average. There is an opportunity to communicate what Wessex Water is doing to address sewage spills and environmental impacts and show transparency surrounding costs.

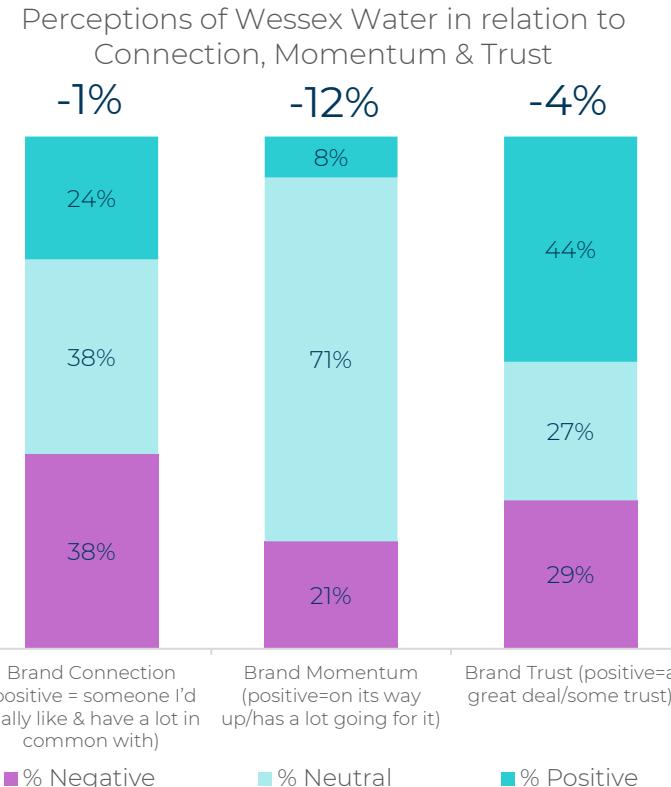
Active Community members
Total Base Size: 796
Wessex Water Base Size: 42



Wessex Water: Barometer Findings

Brand perceptions & performance (satisfaction)

+/- Difference (positive) vs. Current Industry Average



% Who agree that Wessex Water...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

CCW
The voice for water consumers
Llais defnyddwyr dŵr

+/- Difference vs. Current Industry Average

Statement	% Agree	+/- Difference vs. Current Industry Average
Deliver great service for all customers	36%	- 6%
Improves our rivers	17%	- 4%
Creates a greener future	14%	- 10%
Spends customers' money wisely	9%	- 10%
Contributes to our communities	19%	- 8%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Overall Satisfaction	40%	-12%
Colour & Appearance	86%	+4%
Taste & Smell	79%	+4%
Safety of Drinking Water	79%	+2%
Reliability of Supply	88%	+1%
Water Pressure	71%	-6%

Sewerage

Overall Satisfaction	50%	-1%
Reducing smells from sewage treatment works	24%	-7%
Maintenance of sewerage pipes and treatment works	27%	-8%
Cleaning wastewater properly before release back into environment	16%	-14%
Minimising sewer flooding	13%	-17%

Wessex Water should inform customers about what they are doing to create a greener future and how they are spending money. This will help to build trust. Improving cleaning wastewater and minimising sewer flooding will help increase satisfaction scores.

Active Community members
Total Base Size: 796
Wessex Water Base Size: 42



Wessex Water: Spotlight Findings

Wessex Water customers value safe drinking water and see this as a number 1 priority, followed by a need for Wessex Water to reduce leaks in the system and upgrade water mains and pipes to help towards a reliable supply.

Ranking Customer Priorities

% Very Important

Water

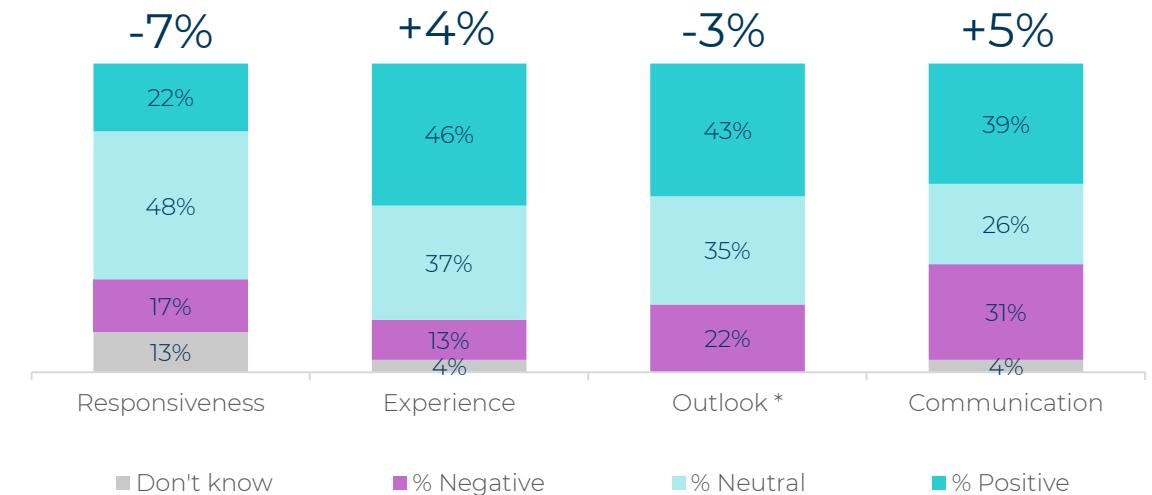
1. Safe drinking water: 96%
2. Reducing leaks: 70%
3. Upgrading water mains and pipes for a reliable supply: 63%

Sewerage

1. Reducing the amount of wastewater entering the environment: 96%
2. Maintenance of sewerage pipes and treatment works: 70%
3. Reducing smells from sewage treatment works: 63%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Wessex Water in relation to Responsiveness, Experience, Outlook & Communication

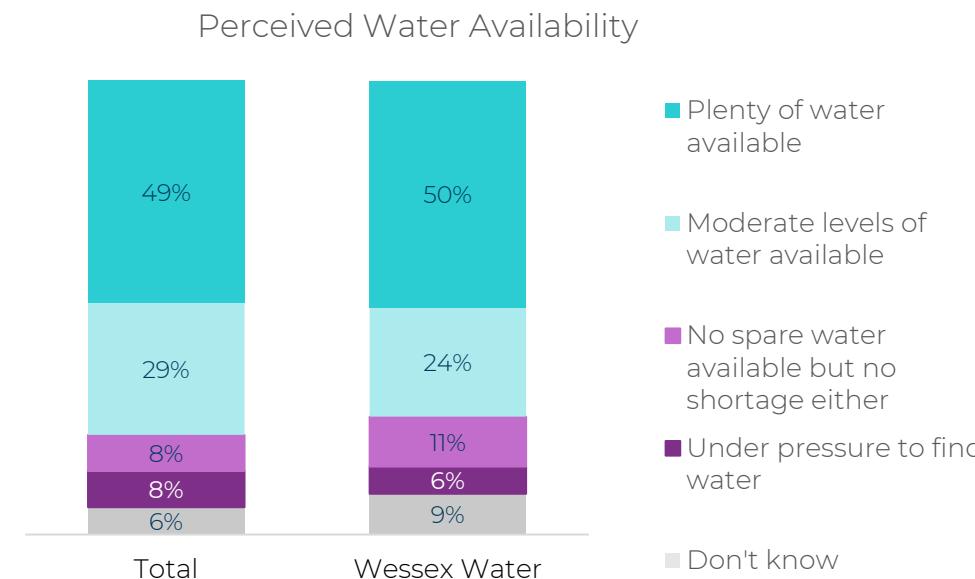


Communication and experience are performing above average. However, responsiveness and outlook are less positive. Wessex Water can do more to showcase how they are being responsive to public concerns.

Active Community members
Total Base Size: 796
Wessex Water Base Size: 42

Water Resources

Wessex Water customers are overall less likely to think there is water available in their area (when looking at plenty or moderate levels combined). As a community they feel less informed on the water and sewerage treatment process.



Water Process

41% of consumers say they **know a lot or a little** about the water process (-10%)

59% **don't know much or know nothing** about it (+10%)

Sewerage Process

39% of consumers say they **know a lot or a little** about the wastewater process (-9%)

61% **don't know much or know nothing** about it (+9%)

"There's a lot of steps in the treatment process for both clean and wastewater which I didn't think it was that complicated. It does make me feel better knowing there's this many steps for drinking especially."

Female, 24, Living with partner/spouse, Wessex Water Customer

Wessex customers are less aware of both the water and sewerage processes than average. There is an opportunity to better inform customers of these processes.

Active Community members
Total Base Size: 796
Wessex Water Base Size: 42



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Yorkshire Water

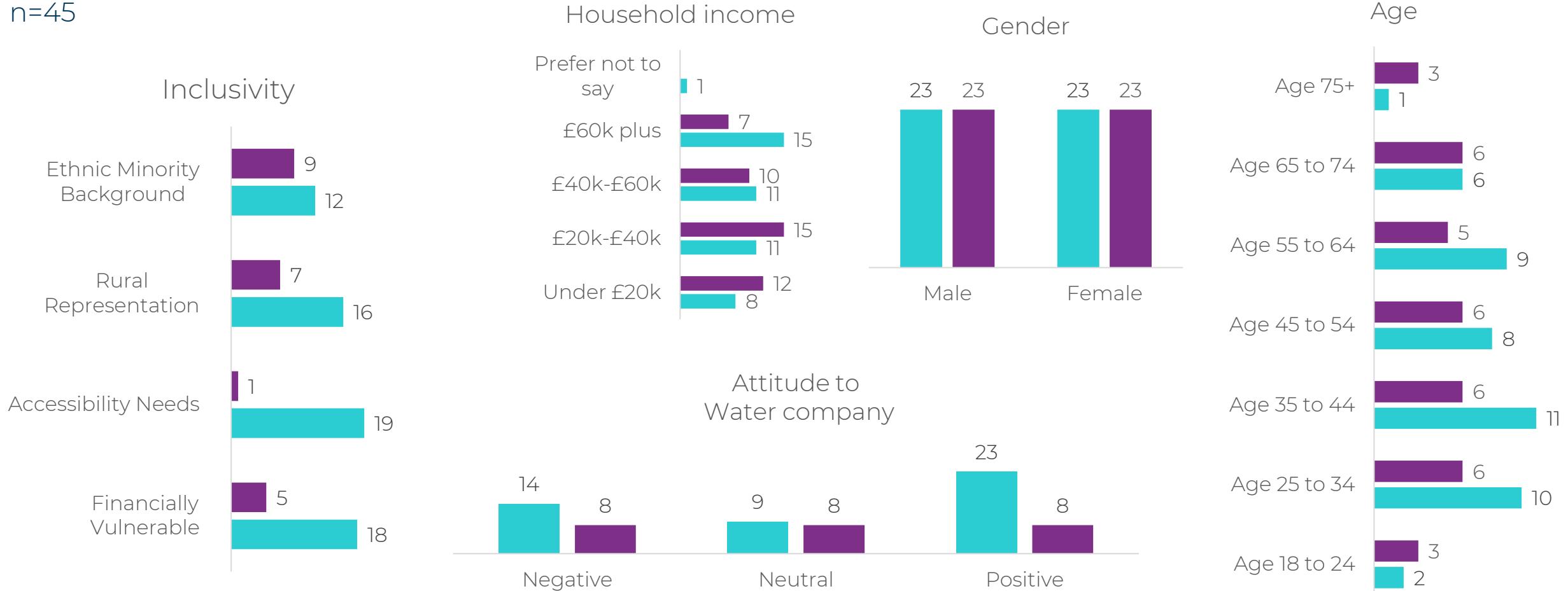
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

Yorkshire Water Community members: n=45



Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 18-24 & 75+ sample by at least 2 for next month.

Dashboard Summary



	Topic	Agreement % for total sample	Yorkshire Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	27%	-2%
	Recent Experience (Positive recent experience)	42%	42%	0%
	General outlook (Positive outlook)	46%	49%	3%
	Communication (Fair/good communication)	34%	38%	4%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	22%	-3%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	24%	4%
	Trust (a great deal/some trust)	48%	42%	-6%
	Past 4 Week Interaction	39%	51%	12%
	Past 4 Week Disruption	5%	0%	-5%
	Past 4 Week Water Quality Issues	7%	4%	-3%
	Past 4 Week Sewerage issues	2%	0%	-2%
	Overall Value for Money	40%	42%	2%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	44%	-8%
	Colour & Appearance	82%	84%	2%
	Taste & Smell	75%	82%	7%
	Safety of Drinking Water	77%	87%	10%
	Reliability of Supply	87%	84%	-3%
	Water Pressure	77%	78%	1%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	51%	0%
	Reducing smells from sewage treatment works	31%	40%	9%
	Maintenance of sewerage pipes and treatment works	35%	37%	2%
	Cleaning wastewater properly before release back into environment	30%	40%	10%
	Minimising sewer flooding	30%	47%	17%

KEY:
% difference +10% above Average
% difference -10% below Average

Active Community members n= 796
 Yorkshire Water Community members n=45.

Executive Summary

Overview of Key Findings

Barometer



- Communication focused on what Yorkshire Water is doing to protect the environment, as well as increasing transparency around billing and costs, is likely to drive higher satisfaction scores.
- Yorkshire Water scores well on a number of individual elements of the water and sewerage satisfaction scores. Building trust through communication with customers along with improving supply reliability will help to increase the overall satisfaction scores.

Spotlight



- Yorkshire Water is average or above with experience, outlook and communication. Ensuring a quicker response or communicating any delays will help to improve perceptions of responsiveness.
- Yorkshire Water customers feel less aware of water and sewerage processes than average. There is an opportunity to educate customers on these processes.



As a customer, overall, how satisfied are you with Yorkshire Water?

5.91/10 vs 6.26/10 (total)

Why do Yorkshire Water customers feel this way?

Customers are generally satisfied with Yorkshire Water's day-to-day supply and helpful customer service, but rising bills, frequent leaks, hosepipe bans, pollution concerns, and perceptions of poor investment and high profits reduce trust.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
Total Base Size: 796
Yorkshire Water Base Size: 45

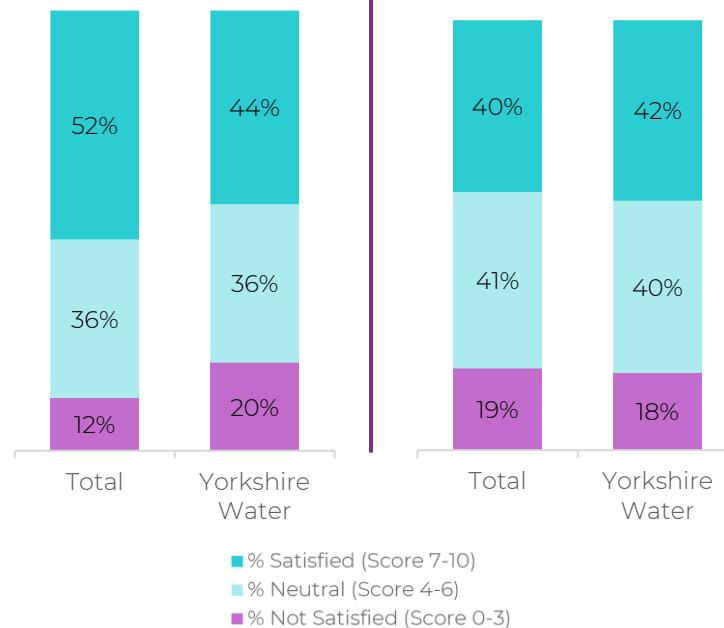


Yorkshire Water: Barometer Findings

44% are satisfied with Yorkshire Water overall

20% are not satisfied

Overall Satisfaction - Water



Overall satisfaction is below average, driven by a larger than average amount of unsatisfied customers. On the other hand, satisfaction surrounding value for money is slightly above average.

Customers generally feel that water quality and supply are reliable, but many are concerned with Yorkshire Water surrounding environmental performance, transparency and costs.

Why have you given this overall satisfaction score on water?

"When I had spoken to someone from Yorkshire water the staff member was really kind and helpful."

Male, 42,
Lives with partner/spouse & child/children, 10/10 satisfaction score

"Their performance hasn't been good overall especially with the news I'm seeing most times, but water services hasn't been that bad, no issues with them currently."

Male, 32, Lives with partner/spouse & child/children, 6/10 satisfaction score

"Bills keep going up while my water pressure is terrible, cannot even have a decent shower."

Male, 52, Lives with partner/spouse & child/children, 1/10 satisfaction score

Communication focused on what Yorkshire Water is doing to protect the environment, as well as increasing transparency around billing and costs, is likely to drive higher satisfaction scores.

Active Community members
Total Base Size: 796
Yorkshire Water Base Size: 45



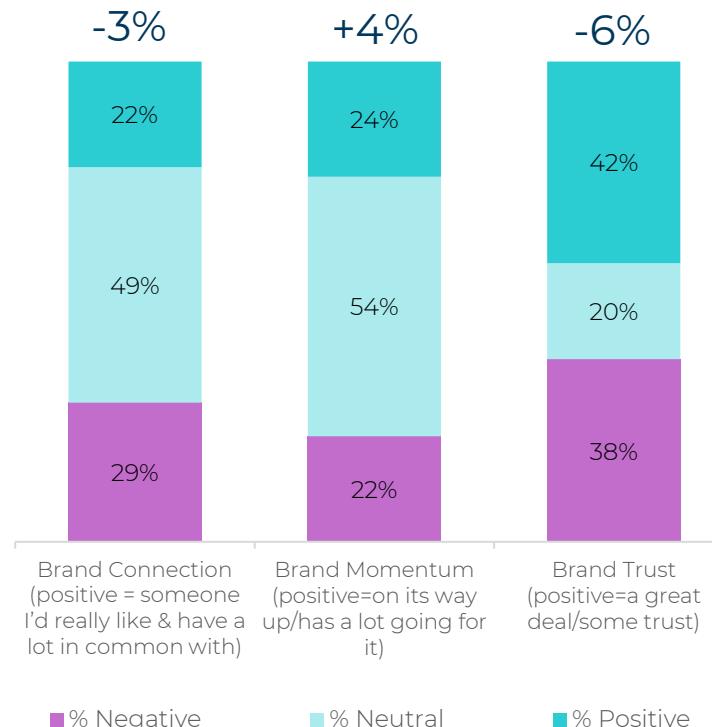
Yorkshire Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- difference (positive) vs. Current Industry Average

Perceptions of Yorkshire Water in relation to Connection, Momentum & Trust



% Who agree that Yorkshire Water...

Deliver great service for all customers	47%	+ 5%
Improves our rivers	31%	+ 10%
Creates a greener future	31%	+ 7%
Spends customers' money wisely	20%	+ 1%
Contributes to our communities	35%	+ 8%

+/- Difference vs. Current Industry Average

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Overall Satisfaction	44%	-8%
Colour & Appearance	84%	+ 2%
Taste & Smell	82%	+ 7%
Safety of Drinking Water	87%	+ 10%
Reliability of Supply	84%	- 3%
Water Pressure	78%	+ 1%

Sewerage

Overall Satisfaction	51%	0%
Reducing smells from sewage treatment works	40%	+ 9%
Maintenance of sewerage pipes and treatment works	37%	+ 2%
Cleaning wastewater properly before release back into environment	40%	+ 10%
Minimising sewer flooding	47%	+ 17%

Yorkshire Water scores well on a number of individual elements of the water and sewerage satisfaction scores. Building trust through communication with customers along with improving supply reliability will help to increase the overall satisfaction scores.

Active Community members
Total Base Size: 796
Yorkshire Water Base Size: 45



Yorkshire Water: Spotlight Findings

Yorkshire Water customers value safe drinking water and see this as a number 1 priority, followed by a need for Yorkshire Water to reduce leaks in the system and invest in upgrading water mains and pipes for a reliable supply. When it comes to sewerage, customers' number 1 priority is maintaining sewerage pipes and treatment works.

Ranking Customer Priorities

% Very Important

Water

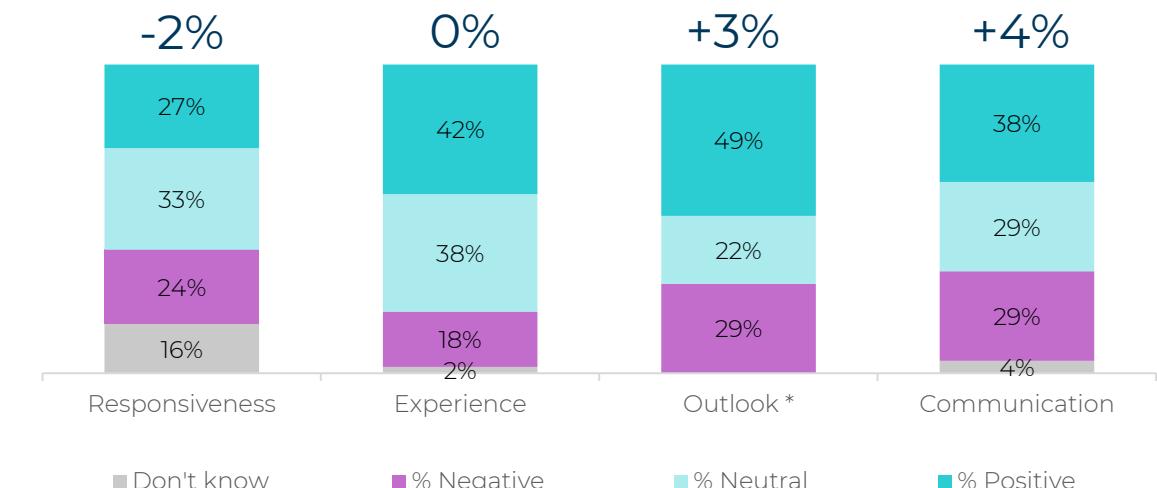
1. Safe drinking water: 96%
2. Reducing leaks: 76%
3. Upgrading water mains and pipes for a reliable supply: 69%

Sewerage

1. Maintenance of sewerage pipes and treatment works: 96%
2. Reducing the amount of wastewater entering the environment: 76%
3. Reducing smells from sewage treatment works: 69%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Yorkshire Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

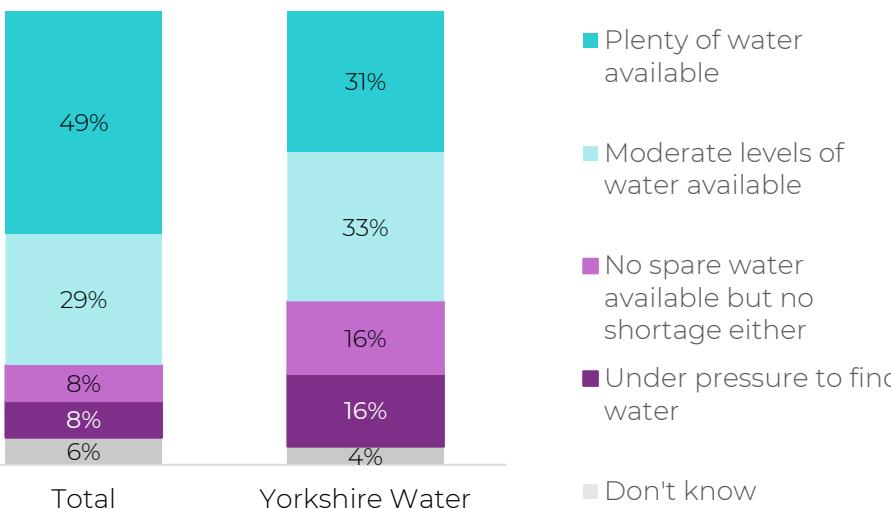
Yorkshire Water is average or above with experience, outlook and communication. Ensuring a quicker response or communicating any delays will help to improve perceptions of responsiveness.

Active Community members
Total Base Size: 796
Yorkshire Water Base Size: 45

Water Resources

Yorkshire Water customers are a lot less likely to think there is plenty of water available in their area. As a community they feel less informed on the water and sewerage treatment process.

Perceived Water Availability



Water Process

31% of consumers say they know a lot or a little about the water process (-20%)

69% don't know much or know nothing about it (+20%)

Sewerage Process

31% of consumers say they know a lot or a little about the wastewater process (-17%)

69% don't know much or know nothing about it (-17%)

"The process looks thorough, but I need to know that it's safe. I have filtered water in the home for around 25 years as I don't entirely trust the system and have had an in-line filter for around 10 years for the main tap which we use for drinking water!"

Male, 71, Living with partner/spouse, Yorkshire Water Customer

Yorkshire Water customers feel less aware of water and sewerage processes than average. There is an opportunity to educate customers on these processes.

Active Community members
Total Base Size: 796
Yorkshire Water Base Size: 45



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Dŵr Cymru

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

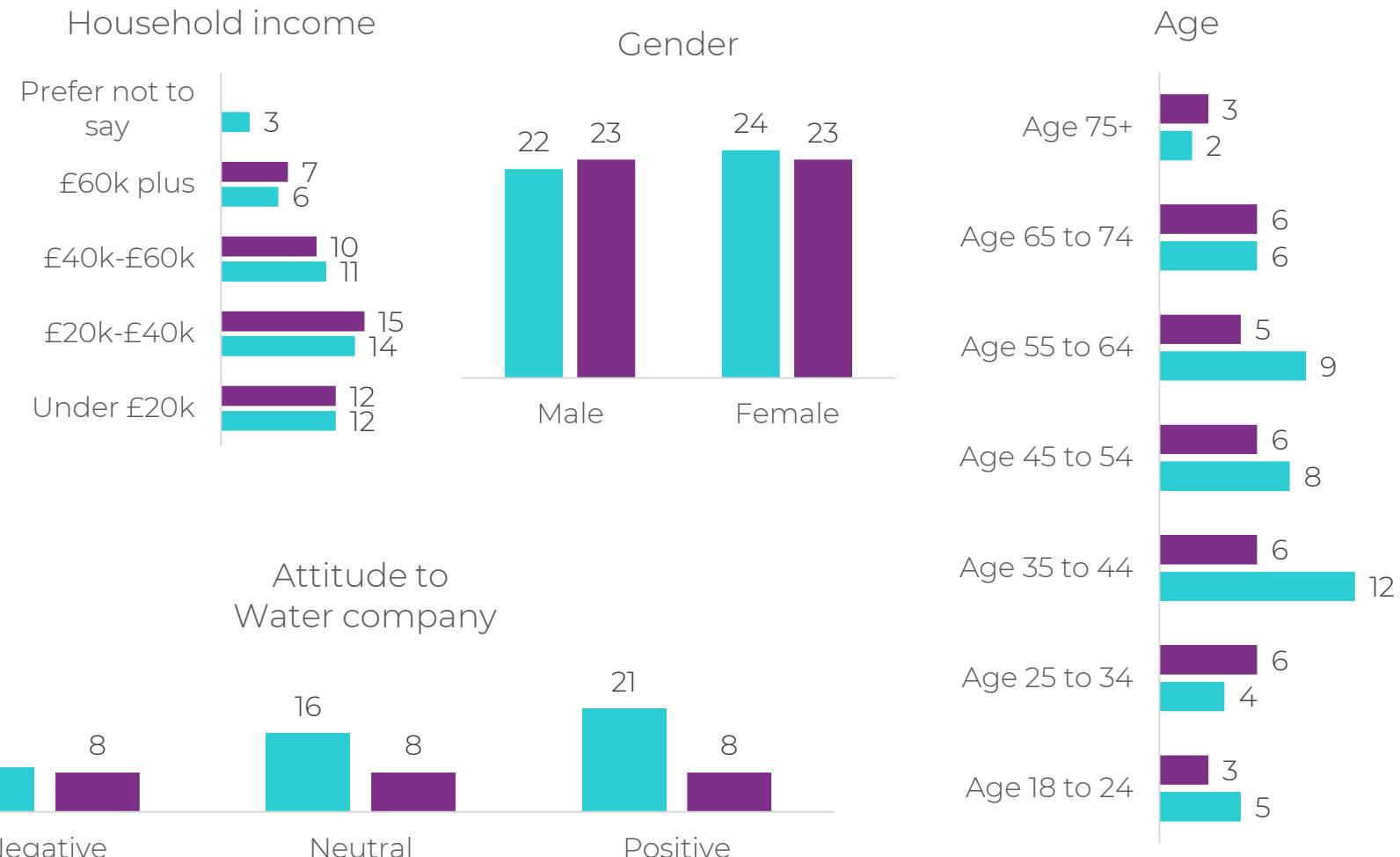
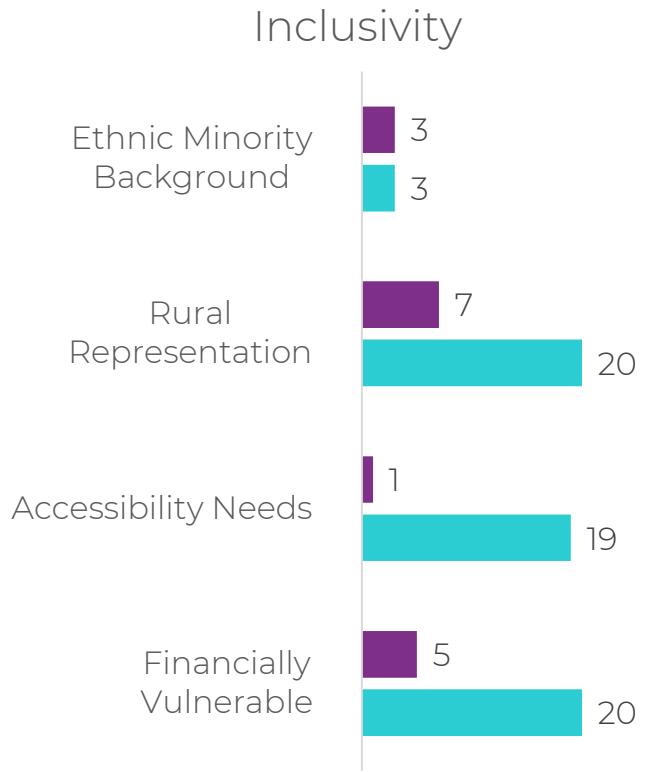
Version: Final copy 15.12.25

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Dŵr Cymru Community members:

n=46

There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language and no one has requested the survey in Welsh.



Sample note: We have met over 95% of our minimum sample quotas. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our Male & 75+ sample by at least 2 for next month.

 Current Quota  Minimum Quota

Dashboard Summary



	Topic	Agreement % for total sample	Dŵr Cymru	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	32%	3%
	Recent Experience (Positive recent experience)	42%	34%	-8%
	General outlook (Positive outlook)	46%	46%	0%
	Communication (Fair/good communication)	34%	28%	-6%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	26%	1%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	20%	0%
	Trust (a great deal/some trust)	48%	41%	-7%
	Past 4 Week Interaction	39%	41%	2%
	Past 4 Week Disruption	5%	11%	6%
	Past 4 Week Water Quality Issues	7%	9%	2%
	Past 4 Week Sewerage issues	2%	0%	-2%
	Overall Value for Money	40%	35%	-5%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	46%	-6%
	Colour & Appearance	82%	83%	1%
	Taste & Smell	75%	78%	3%
	Safety of Drinking Water	77%	74%	-3%
	Reliability of Supply	87%	83%	-4%
	Water Pressure	77%	76%	-1%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	48%	-3%
	Reducing smells from sewage treatment works	31%	37%	6%
	Maintenance of sewerage pipes and treatment works	35%	39%	4%
	Cleaning wastewater properly before release back into environment	30%	27%	-3%
	Minimising sewer flooding	30%	23%	-7%

KEY:
 % difference +10%
 above Average
 % difference -10%
 below Average

Active Community members n= 796
 Dŵr Cymru
 Community members n=46.

Executive Summary

Overview of Key Findings

Barometer



- Clearly communicating what Dŵr Cymru is doing to address environmental concerns, as well as being transparent about price increases (and what this is being spent on), will help to build trust and increase satisfaction scores as a result.
- Dŵr Cymru have average or below average scores on all water and sewerage satisfaction metrics, which is impacting brand trust.

Spotlight



- Experience and communication are scoring lower than average. There are opportunity to improve across both these areas.
- Dŵr Cymru customers feel more aware of water processes than the industry average, and most feel reassured when they find out the extensive treatment processes. Education/transparency is likely to build trust.



Dŵr Cymru
Welsh Water

CCW
The voice for water consumers
Llais defnyddwyr dŵr

As a customer, overall, how satisfied are you with Dŵr Cymru?

6.18/10 vs 6.26/10 (total)

Why do Dŵr Cymru customers feel this way?

Customers are generally satisfied with Dŵr Cymru's clear communication and customer service. Customers have concerns about rising bills, sewage pollution, limited investment, and trust – particularly after past incidents and price hikes – which is weakening confidence.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

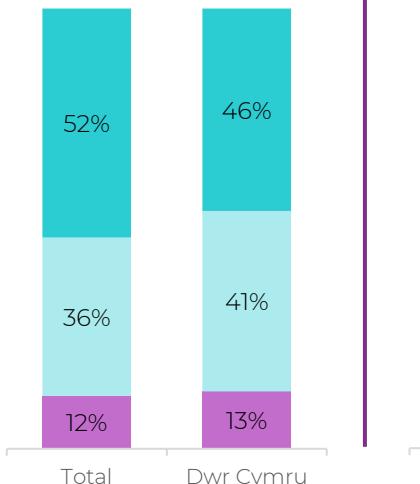
Active Community members
Total Base Size: 796
Dŵr Cymru Base Size: 46



Dŵr Cymru: Barometer Findings

46% are satisfied with Dŵr Cymru overall
13% are not satisfied

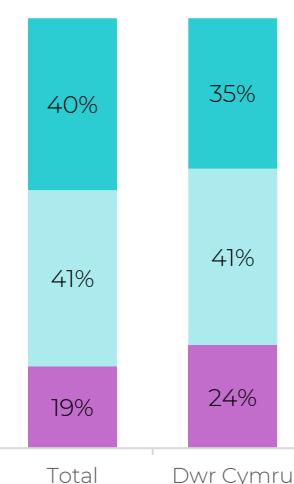
Overall Satisfaction - Water



■ % Satisfied (Score 7-10)
■ % Neutral (Score 4-6)
■ % Not Satisfied (Score 0-3)

35% are satisfied with value for money
24% are not satisfied

Overall Value for Money Satisfaction



Overall satisfaction and value for money satisfaction are both below average, with more customers giving neutral responses for overall satisfaction.

Environmental performance, price increases and trust are key areas leading to lower scores.

Why have you given this overall satisfaction score on water?

“Increased my bill by a huge amount while dumping sewage in our seas.”

Female, 44,
Lives with partner/spouse & child/children, Dŵr Cymru,
2/10 satisfaction score

“I've never experienced any issues with water supply. However, I don't really know much about what they do either. A friend of mine did have an issue and it took a long time to resolve.”

Female, 51, Lives with partner/spouse, Dŵr Cymru, 6/10 satisfaction score

“I do not have any issues with my provider, water quality is good, unaware of interruptions and bills delivered on online portal.”

Male, 66, Lives with partner/spouse, Dŵr Cymru, 9/10 satisfaction score

Clearly communicating what Dŵr Cymru is doing to address environmental concerns, as well as being transparent about price increases (and what this is being spent on) will help to build trust and increase satisfaction scores as a result.

Active Community members
Total Base Size: 796
Dŵr Cymru Base Size: 46



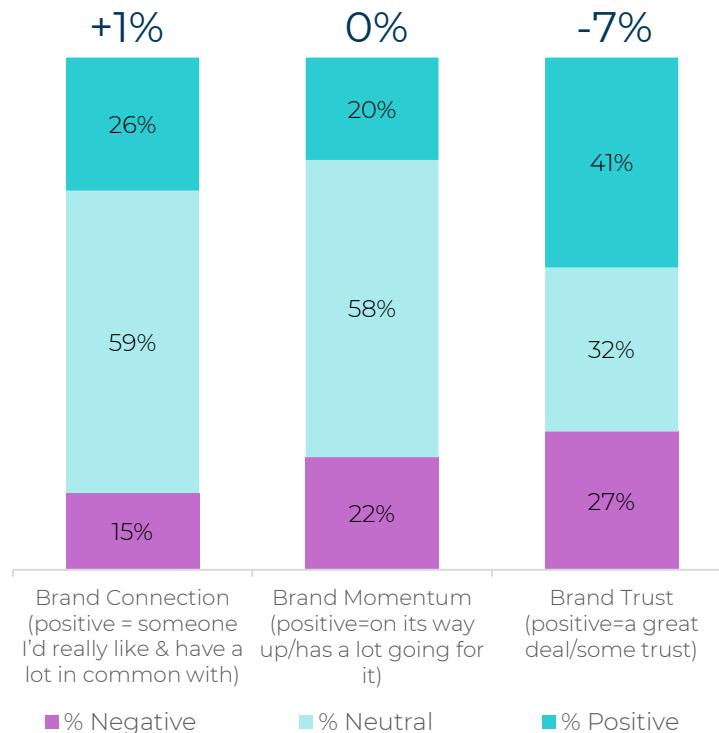
Dŵr Cymru: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Dŵr Cymru in relation to Connection, Momentum & Trust



% Who agree that Dŵr Cymru...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

35% - 7%
13% - 8%
22% - 2%
19% 0%
19% - 8%

% Satisfied with...

+/- Difference vs. Current Industry Average

Water

Overall Satisfaction 46% - 6%
Colour & Appearance 83% + 2%
Taste & Smell 78% + 3%
Safety of Drinking Water 74% - 3%
Reliability of Supply 83% - 4%
Water Pressure 76% - 1%

Sewerage

Overall Satisfaction 48% - 3%
Reducing smells from sewage treatment works 37% + 6%
Maintenance of sewerage pipes and treatment works 39% + 4%
Cleaning wastewater properly before release back into environment 27% - 3%
Minimising sewer flooding 23% - 7%

Dŵr Cymru have average or below average scores on all water and sewerage satisfaction metrics, which is impacting brand trust.

Active Community members
Total Base Size: 796
Dŵr Cymru Base Size: 46



Dŵr Cymru: Spotlight Findings

Dŵr Cymru customers value safe drinking water and see this as a number 1 priority, followed by a need for Dŵr Cymru to reduce leaks in the system and invest in upgrading water mains, pipes and treatment processes to ensure a reliable supply and reduce/prevent issues with taste, smell and appearance of water.

Ranking Customer Priorities

% Very Important

Water

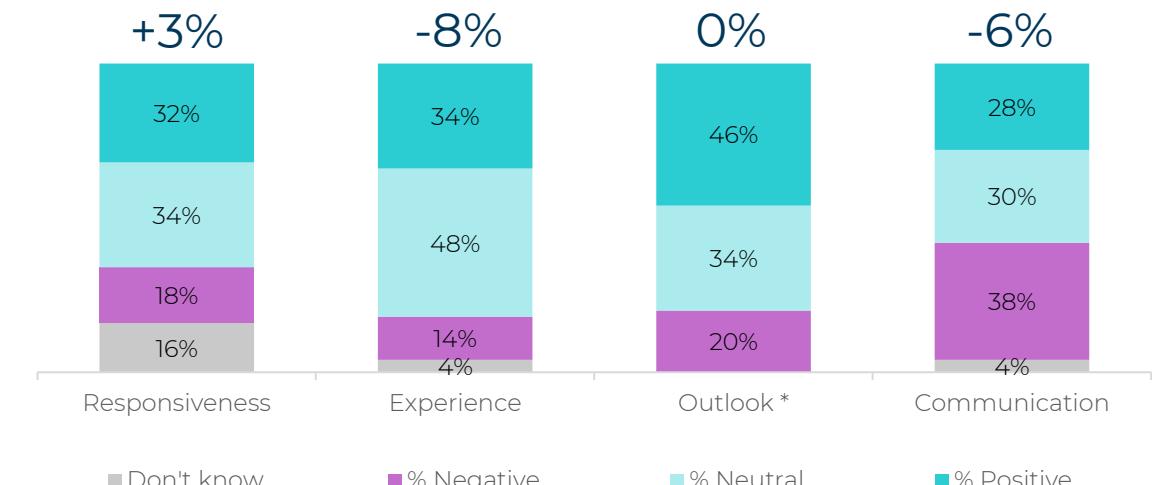
1. Safe drinking water: 96%
2. Reducing leaks: 82%
3. Upgrading water mains and pipes for a reliable supply and improving water treatment processes to reduce/prevent issues with taste, smell or appearance of drinking water: 76%

Sewerage

1. Reducing the amount of wastewater entering the environment: 96%
2. Maintenance of sewerage pipes and treatment works: 82%
3. Reducing smells from sewage treatment works: 76%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Dŵr Cymru in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Experience and communication are lower than average. Opportunity to improve across both these areas.

Active Community members
Total Base Size: 796
Dŵr Cymru Base Size: 46



Dŵr Cymru: Spotlight Findings

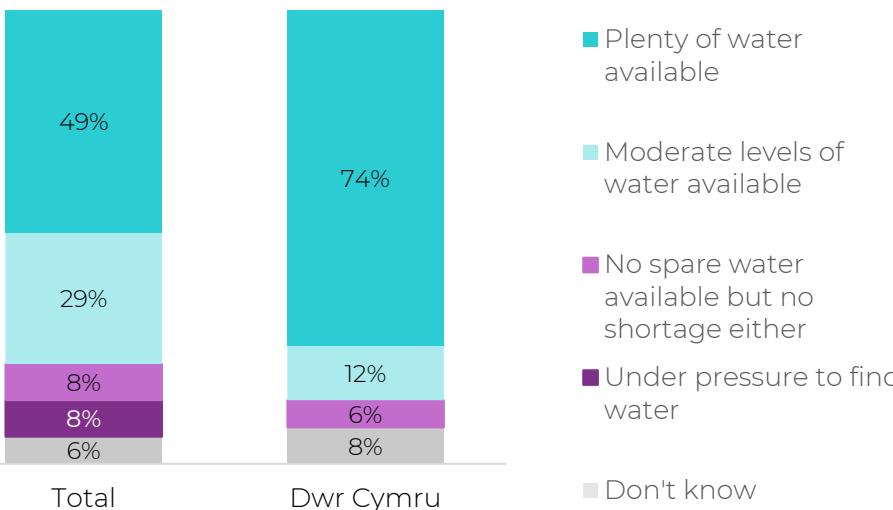
Processes & Resources



Water Resources

Dŵr Cymru customers are a lot more likely to think there is plenty of water available in their area. As a community they feel more informed on the water and sewerage treatment process than average.

Perceived Water Availability



Water Process

66% of consumers say they know a lot or a little about the water process (+15%)

34% don't know much or know nothing about it (-15%)

Sewerage Process

58% of consumers say they know a lot or a little about the wastewater process (+10%)

42% don't know much or know nothing about it (-10%)

"It seems a lot is done to make sure drinking water is safe to be consumed, which is very reassuring."

Male, 44, Lives with child/children, Dŵr Cymru Customer

Dŵr Cymru customers feel more aware of treatment processes than average, and most feel reassured when they find out the extensive treatment processes. Education/transparency is likely to build trust.

Active Community members
Total Base Size: 796
Dŵr Cymru Base Size: 46



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Hafren Dyfrdwy

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

Hafren Dyfrdwy

Community population

Hafren Dyfrdwy Community members: n=45

There are 9 Welsh speakers within this community with 2 members speaking Welsh as their first language and 2 have requested & been sent the survey in Welsh.

Inclusivity

Ethnic Minority Background

Rural Representation

Accessibility Needs

Financially Vulnerable

Household income

Prefer not to say

£60k plus

£40k-£60k

£20k-£40k

Under £20k

Gender

Male

Female

Age

Age 75+

Age 65 to 74

Age 55 to 64

Age 45 to 54

Age 35 to 44

Age 25 to 34

Age 18 to 24

Negative

Neutral

Positive

Attitude to Water company

9

8

16

8

20

8

Current Quota

Minimum Quota

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our Male, 18-24 & 75+ sample by at least 2 for next month.

Dashboard Summary

	Topic	Agreement % for total sample	Hafren Dyfrdwy	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	24%	-5%
	Recent Experience (Positive recent experience)	42%	49%	+7%
	General outlook (Positive outlook)	46%	51%	+5%
	Communication (Fair/good communication)	34%	33%	-1%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	24%	-1%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	27%	+7%
	Trust (a great deal/some trust)	48%	68%	+20%
	Past 4 Week Interaction	39%	27%	-12%
	Past 4 Week Disruption	5%	2%	-3%
	Past 4 Week Water Quality Issues	7%	0%	-7%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	51%	+11%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	58%	+6%
	Colour & Appearance	82%	93%	+11%
	Taste & Smell	75%	91%	+16%
	Safety of Drinking Water	77%	87%	+10%
	Reliability of Supply	87%	91%	4%
	Water Pressure	77%	82%	5%
	Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	51%	56%	5%
	Reducing smells from sewage treatment works	31%	34%	3%
	Maintenance of sewerage pipes and treatment works	35%	32%	-3%
	Cleaning wastewater properly before release back into environment	30%	44%	+14%
	Minimising sewer flooding	30%	47%	+17%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members n= 796
 Hafren Dyfrdwy Community members n=45.

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction levels are higher than average. Opportunity to increase transparency around price rises, repairs, and environmental performance.
- Hafren Dyfrdwy is performing well on almost all water and sewerage satisfaction metrics, which is likely helping to drive brand trust and momentum.

Spotlight



- Although responsiveness and communication are slightly lower than average, it isn't impacting on overall satisfaction and trust.
- Hafren Dyfrdwy customers feel more aware of the water process than average but are less aware of the sewerage process. There is appetite for more knowledge/information about this among customers.



As a customer, overall, how satisfied are you with Hafren Dyfrdwy?

6.78/10 vs 6.26/10 (Total)

Why do Hafren Dyfrdwy customers feel this way?

Customers generally feel Hafren Dyfrdwy provides a reliable, good-quality water supply with few day-to-day issues, but rising bills, slow repairs, limited communication, and worries about environmental performance and infrastructure investment reduce trust and prevent higher satisfaction.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
n= 796
Hafren Dyfrdwy
Community members n=45

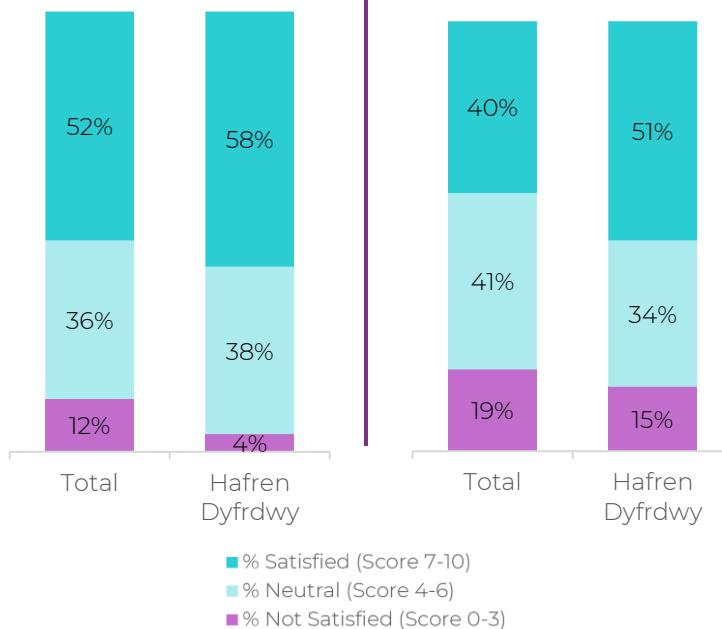


Hafren Dyfrdwy: Barometer Findings

58% are satisfied with Hafren Dyfrdwy overall

4% are not satisfied

Overall Satisfaction - Water



51% are satisfied with value for money

15% are not satisfied

Overall Value for Money Satisfaction

Satisfaction is above average for both overall satisfaction and satisfaction with value for money.

Customers are generally satisfied with reliable water supply and service but express concerns about rising costs, limited communication, slow infrastructure repairs, and environmental performance, which prevents higher satisfaction scores.

Why have you given this overall satisfaction score on water?

“Never had any problems with the water in my house but would like to be informed more about what they are doing to help support wildlife and the wider community.”

*Male, 51,
Lives with partner/spouse & child/children
9/10 satisfaction score*

“Costs going up and up no explanation.”

*Male, 34, Lives with partner/spouse & child/children
1/10 satisfaction score*

“Not very helpful when I was trying to find out if we were on a shared water supply with our next door neighbour, this was when we were considering having a water meter.”

*Female, 65, Lives with partner/spouse
5/10 satisfaction score*

Satisfaction levels are higher than average. Opportunity to increase transparency around price rises, repairs, and environmental performance.

Active Community members
n= 796
Hafren Dyfrdwy
Community members n=45



Hafren Dyfrdwy: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average



% Who agree that Hafren Dyfrdwy...

Deliver great service for all customers
Improves our rivers
Creates a greener future
Spends customers' money wisely
Contributes to our communities

+/- Difference vs. Current Industry Average

60%	+ 18%
20%	- 1%
17%	- 7%
22%	+ 3%
26%	- 1%

% Satisfied with...

Water

Overall Satisfaction	58%	+ 6%
Colour & Appearance	93%	+ 11%
Taste & Smell	91%	+ 16%
Safety of Drinking Water	87%	+ 10%
Reliability of Supply	91%	+ 4%
Water Pressure	82%	+ 5%

Sewerage

Overall Satisfaction	56%	+ 5%
Reducing smells from sewage treatment works	34%	+ 3%
Maintenance of sewerage pipes and treatment works	32%	- 3%
Cleaning wastewater properly before release back into environment	44%	+ 14%
Minimising sewer flooding	47%	+ 17%

+/- Difference vs. Current Industry Average

Hafren Dyfrdwy is performing well on almost all water and sewerage satisfaction metrics, which is likely helping to drive brand trust and momentum.

Active Community members
n= 796
Hafren Dyfrdwy
Community members n=45



Hafren Dyfrdwy: Spotlight Findings

Hafren Dyfrdwy customers value safe drinking water and see this as a number 1 priority, followed by a need for Hafren Dyfrdwy to reduce leaks. Improving water treatment processes and investing in leakage monitoring equipment is also important to these customers.

Ranking Customer Priorities

% Very Important

Water

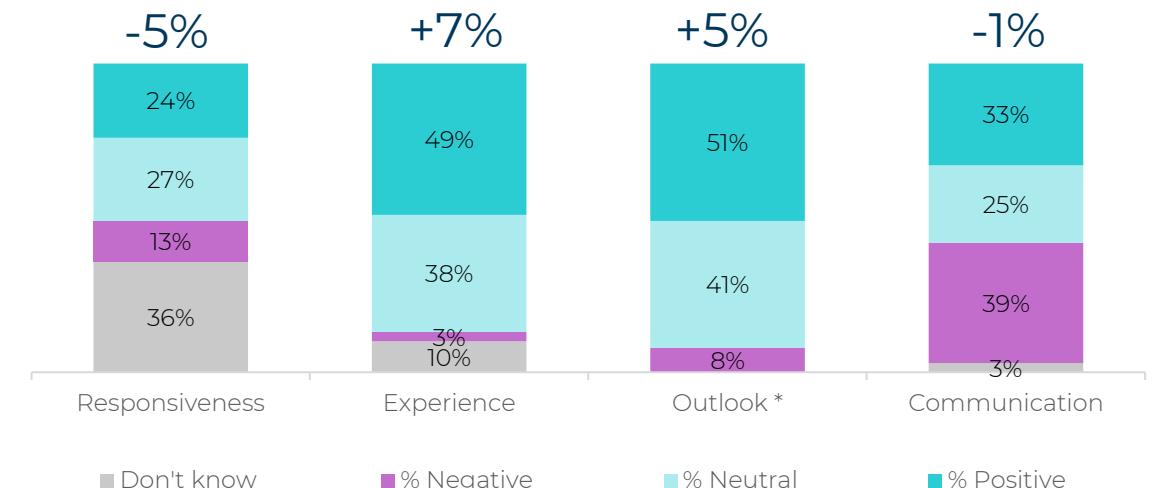
1. Safe drinking water: 97%
2. Reducing leaks: 92%
3. Improving water treatment processes to reduce/prevent issues with taste, smell or appearance of drinking water, and investing in leakage monitoring equipment: 69%

Sewerage

1. Reducing the amount of wastewater entering the environment: 97%
2. Maintenance of sewerage pipes and treatment works: 92%
3. Reducing smells from sewage treatment works: 67%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Hafren Dyfrdwy in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Although responsiveness and communication are slightly lower than average, it isn't impacting on overall satisfaction and trust.

Active Community members
n= 796
Hafren Dyfrdwy
Community members n=45



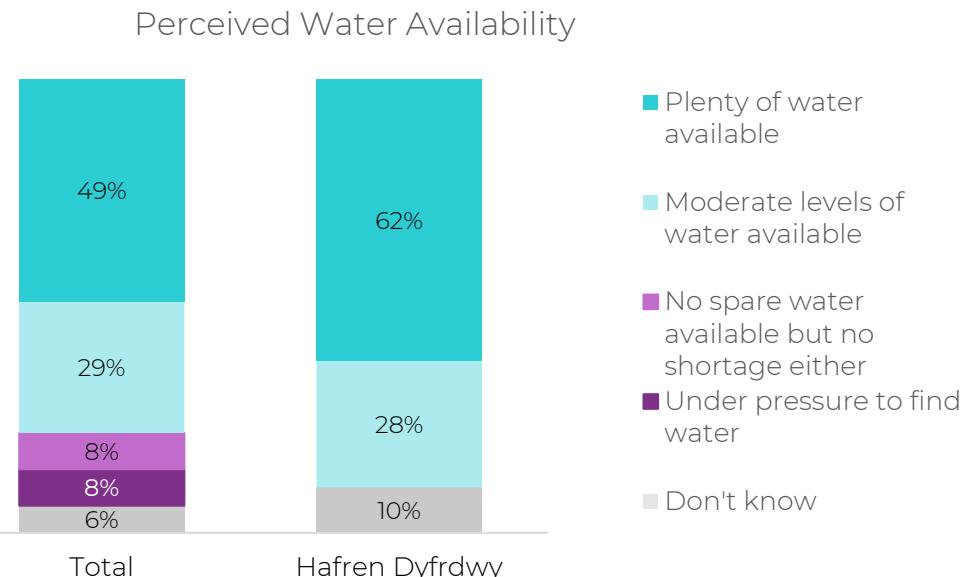
Hafren Dyfrdwy: Spotlight Findings

Processes & Resources



Water Resources

Hafren Dyfrdwy customers are more likely to think there is plenty of water available in their area. As a community they are slightly more informed on the water treatment process.



Water Process

56% of consumers say they know a lot or a little about the water process (+5%)

44% don't know much or know nothing about it (-5%)

Sewerage Process

44% of consumers say they know a lot or a little about the wastewater process (-4%)

56% don't know much or know nothing about it (+4%)

"There is a lot involved in the treatment taking place from beginning to end maybe if it was more public people would be more careful, knowing how much work goes into the process."

Female, 41, Living with partner/spouse & child/children, Hafren Dyfrdwy Customer

Hafren Dyfrdwy customers feel more aware of the water process than average but are less aware of the sewerage process. There is appetite for more knowledge/information about this among customers.

Active Community members
n= 796

Hafren Dyfrdwy
Community members n=45



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Affinity Water

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

Affinity Water Community members: n=46

Inclusivity

Ethnic Minority Background 9
9

Rural Representation 7
10

Accessibility Needs 1
17

Financially Vulnerable 5
8

Household income

Prefer not to say	3
£60k plus	7
£40k-£60k	10
£20k-£40k	15
Under £20k	12

Gender

Male	21	23
Female	25	23

Attitude to Water company

Negative	9	8
Neutral	19	8
Positive	18	8

Age

Age 75+	3	3
Age 65 to 74	6	7
Age 55 to 64	5	8
Age 45 to 54	6	10
Age 35 to 44	6	10
Age 25 to 34	6	8
Age 18 to 24	3	1

Current Quota

Minimum Quota

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 18-24 sample by at least 2 for next month.

Dashboard Summary

**Affinity
Water**

CCW
The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	Affinity Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	31%	+2%
	Recent Experience (Positive recent experience)	42%	49%	+7%
	General outlook (Positive outlook)	46%	42%	-4%
	Communication (Fair/good communication)	34%	40%	+6%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	28%	3%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	20%	0%
	Trust (a great deal/some trust)	48%	47%	-1%
	Past 4 Week Interaction	39%	33%	-6%
	Past 4 Week Disruption	5%	4%	-1%
	Past 4 Week Water Quality Issues	7%	6%	-1%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	41%	+1%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	70%	+18%
	Colour & Appearance	82%	83%	+1%
	Taste & Smell	75%	70%	-5%
	Safety of Drinking Water	77%	74%	-3%
	Reliability of Supply	87%	89%	+2%
	Water Pressure	77%	76%	-1%

KEY:
 % difference +10%
 above Average
 % difference -10%
 below Average

n= 796
 Affinity Water
 Community members
 n=46.

*N.B. References to wastewater management are not related to Affinity as they are not the wastewater provider for this community, but are of concern to their customers.

Executive Summary

Overview of Key Findings

Barometer



- Overall satisfaction is high but dissatisfaction surrounding value for money provides a strong opportunity for Affinity Water to demonstrate how money is being spent and why.
- More can be done to showcase what Affinity Water is doing to contribute to their customers' communities, as well as trying to ensure taste, smell and safety of drinking water.

Spotlight



- Responsiveness, experience and communication are all above average. Affinity Water should continue to focus on delivering against these metrics.
- Whilst customers believe they have a fairly good understanding of the water process, there is an opportunity to be more transparent on capacity and the work that goes into water processing.

As a customer, overall, how satisfied are you with Affinity Water?

6.64/10 vs 6.26/10 (total)

Why do Affinity Water customers feel this way?

Customers generally find Affinity Water reliable with good customer service and a stable supply, but rising bills, hard water quality, limited communication, and concerns about environmental performance, metering, and shareholder priorities reduce trust and dampen overall satisfaction.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

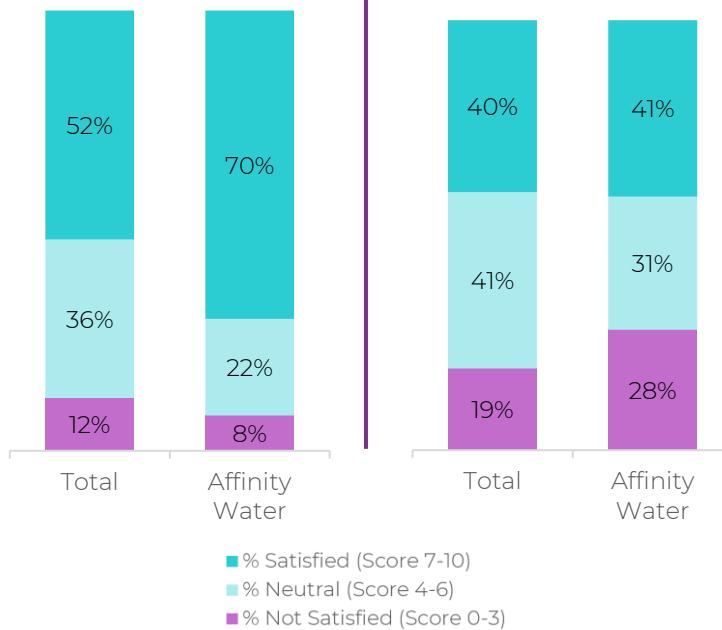
Active Community members
Total Base Size: 796
Affinity Water Base Size: n=46



Affinity Water: Barometer Findings

70% are satisfied with Affinity Water overall
8% are not satisfied

Overall Satisfaction - Water



41% are satisfied with value for money
28% are not satisfied

Overall Value for Money Satisfaction

Overall satisfaction with Affinity Water is above average. However, the percentage of customers who are 'not satisfied' with value for money is above average.

Customers are generally satisfied with reliable supply and good service, but concerns about rising bills, water quality, limited communication, environmental performance, and difficulties with metering or tariffs reduce overall confidence and trust.

Why have you given this overall satisfaction score on water?

"Affinity Water are very responsible and caring towards their customers."

Male, 66, Lives with partner/spouse, Affinity Water, 10/10 satisfaction score

"Do not hear from them they just take money."

Male, 30, Lives alone, Affinity Water, 1/10 satisfaction score

"The quality of the drinking water is the worst I have experienced. The monthly cost is extortionate and ridiculous hoops to jump through to even be considered for more affordable tariffs."

Male, 44, Lives with partner/spouse & child/children, Affinity Water, 6/10 satisfaction score

Overall satisfaction is high but dissatisfaction surrounding value for money provides a strong opportunity for Affinity Water to demonstrate how money is being spent and why.

Active Community members
Total Base Size: 796
Affinity Water Base Size: n=46

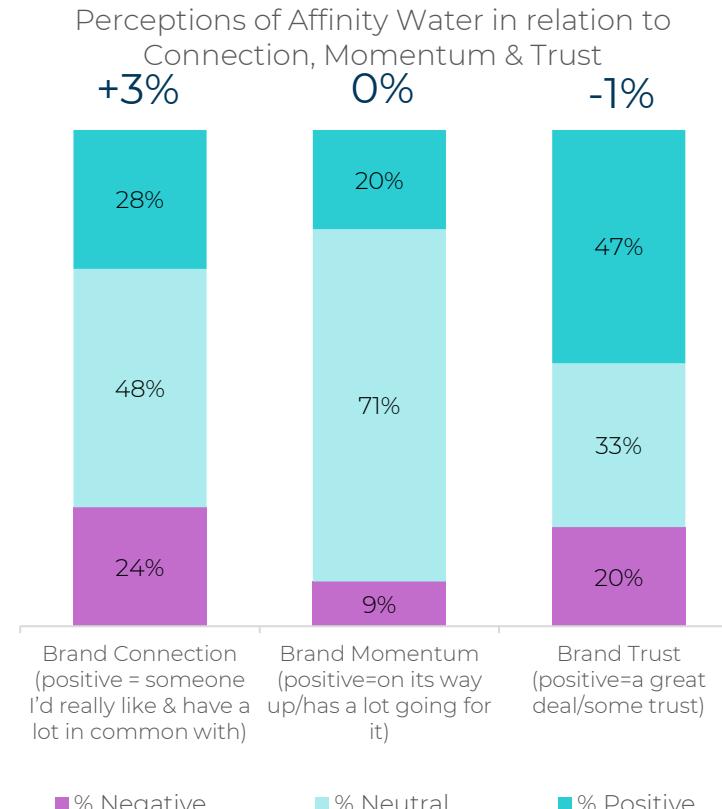


Affinity Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average



% Who agree that Affinity Water...	+/- Difference vs. Current Industry Average
Deliver great service for all customers	39%
Improves our rivers	24%
Creates a greener future	26%
Spends customers' money wisely	18%
Contributes to our communities	20%

% Satisfied with...	+/- Difference vs. Current Industry Average
Water	
Overall Satisfaction	70%
Colour & Appearance	83%
Taste & Smell	70%
Safety of Drinking Water	74%
Reliability of Supply	89%
Water Pressure	76%

More can be done to showcase what Affinity Water is doing to contribute to their customers' communities, as well as trying to ensure taste, smell and safety of drinking water.

Active Community members
Total Base Size: 796
Affinity Water Base Size: n=46



Affinity Water: Spotlight Findings

Affinity Water customers value safe drinking water and see this as a number 1 priority, followed by a need for Affinity Water to do what they can to reduce leaks in the system and invest in upgrading water mains and pipes for a reliable supply.

Ranking Customer Priorities

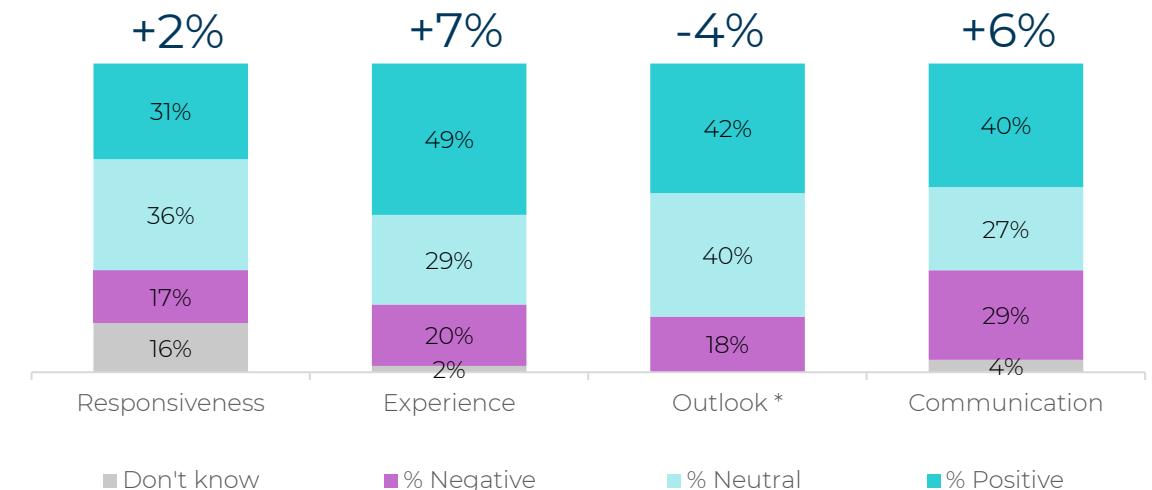
% Very Important

Water

1. Safe drinking water: 96%
2. Reducing leaks: 84%
3. Upgrading water mains and pipes for a reliable supply: 82%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Affinity Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Responsiveness, experience and communication are all above average. Affinity Water should continue to focus on delivering against these metrics.

Active Community members
Total Base Size: 796
Affinity Water Base Size: n=46



Affinity Water: Spotlight Findings

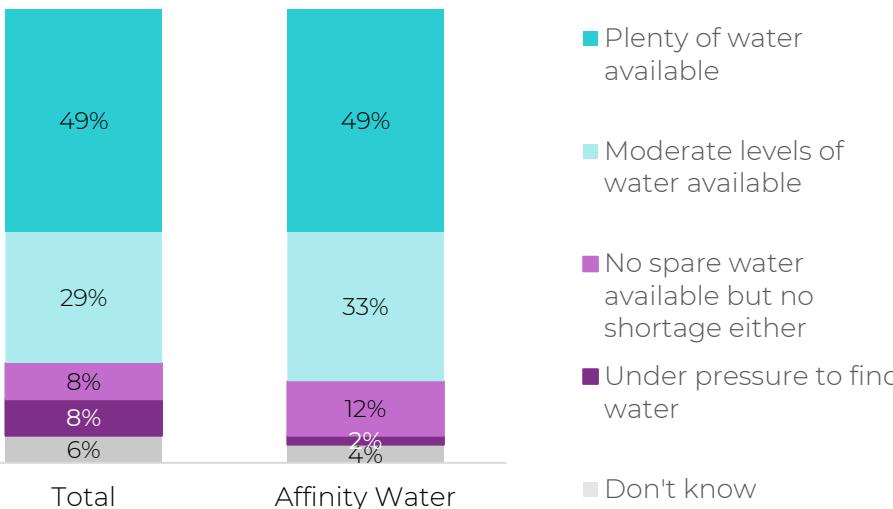
Processes & Resources



Water Resources

Affinity Water customers are in line with the average surrounding perceptions that there is plenty of water available. As a community they feel they are slightly more informed on the water treatment process.

Perceived Water Availability



Water Process

56% of consumers say they **know a lot or a little** about the water process (+5%)

44% don't know much or know nothing about it (-5%)

"I didn't realise it went through all those stages. I'm particularly glad to hear this regarding drinking water as I drink a lot of tap water."

Female, 60, Living with partner/spouse, Affinity Water Customer

Whilst customers believe they have a fairly good understanding of the water process, there is an opportunity to be more transparent on capacity and the work that goes into water processing.

Active Community members
Total Base Size: 796
Affinity Water Base Size: n=46



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

Portsmouth Water

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

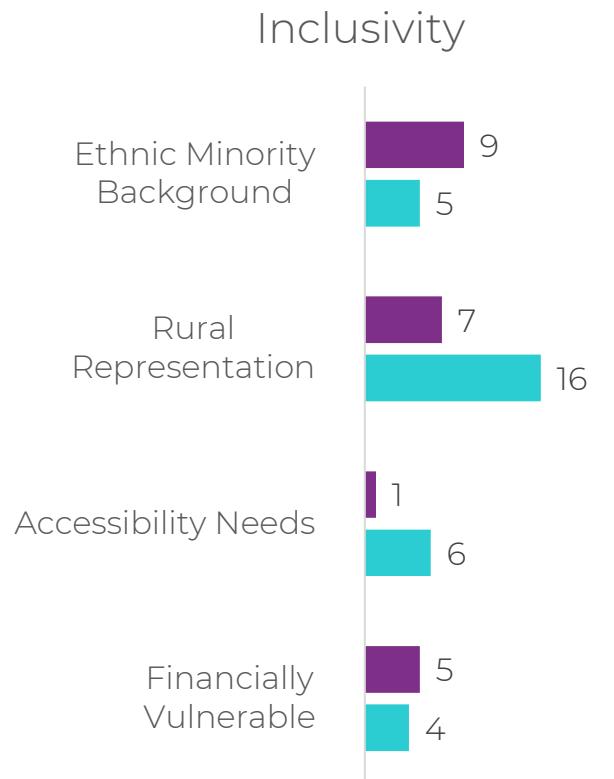
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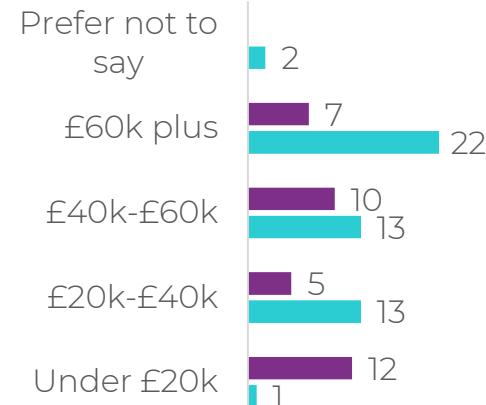
Portsmouth Water

Community population

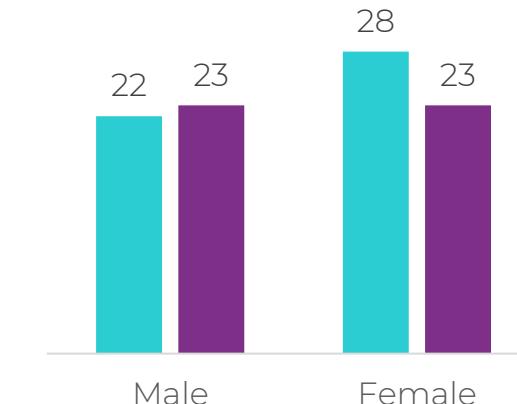
Portsmouth Water
Community members: n=51



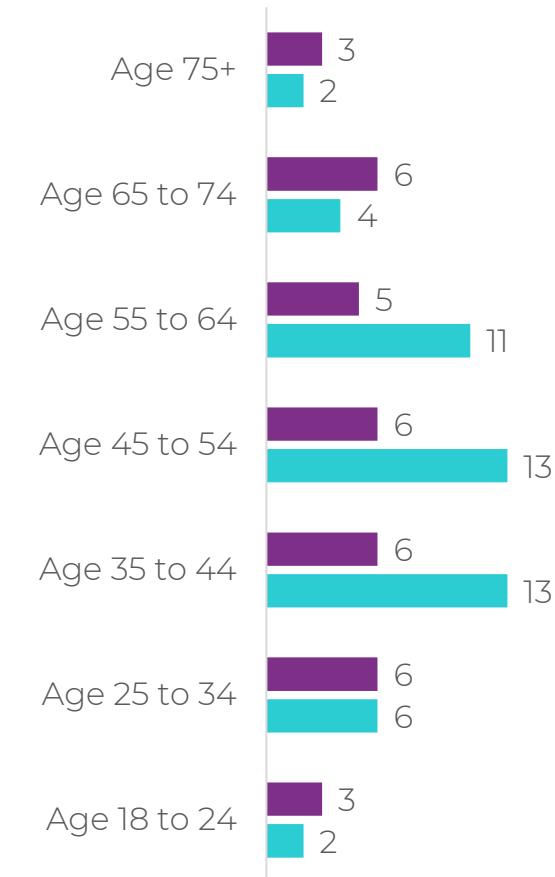
Household income



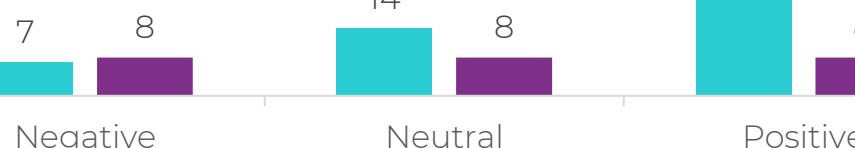
Gender



Age



Attitude to
Water company



Sample note: We have met 90% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however we were able to reach some financially vulnerable customers by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our ethnic minority background and 18-24 & 75+ sample by at least 2 for next month.



Current Quota

Minimum Quota

Dashboard Summary



The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	Portsmouth Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	48%	+19%
	Recent Experience (Positive recent experience)	42%	59%	+17%
	General outlook (Positive outlook)	46%	67%	+21%
	Communication (Fair/good communication)	34%	53%	+19%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	55%	+30%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	45%	+25%
	Trust (a great deal/some trust)	48%	70%	+22%
	Past 4 Week Interaction	39%	43%	+4%
	Past 4 Week Disruption	5%	2%	-3%
	Past 4 Week Water Quality Issues	7%	6%	-1%
	Past 4 Week Sewerage issues	2%	6%	4%
	Overall Value for Money	40%	78%	+38%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	78%	+26%
	Colour & Appearance	82%	94%	+12%
	Taste & Smell	75%	86%	+11%
	Safety of Drinking Water	77%	90%	+13%
	Reliability of Supply	87%	98%	+11%
	Water Pressure	77%	94%	+17%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members n= 796
 Portsmouth Water Community members n=51.

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction scores are industry leading across all measures, most notably around value for money perceptions. Focus should be on maintaining these high standards and sharing best practice within the industry.
- Portsmouth Water scores strongly on all water satisfaction metrics, which drives powerful brand connection, momentum and trust scores.

Spotlight



- Responsiveness, experience, outlook and communication all score well above the industry average, reinforcing strong brand trust and satisfaction. Key opportunity is to keep communication aligned to customer priorities, such as water quality and reducing leaks.
- Portsmouth Water customers report similar levels of water availability and understanding of the water process as the wider community, suggesting scope to deepen engagement on how the company is improving resilience to future water scarcity.



As a customer, overall, how satisfied are you with Portsmouth Water?

7.4/10 vs 6.26/10 (total)

Why do Portsmouth Water customers feel this way?

Customers describe Portsmouth Water as reliable, good quality and fairly priced, with the majority of customers praising the consistent supply and positive customer service.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

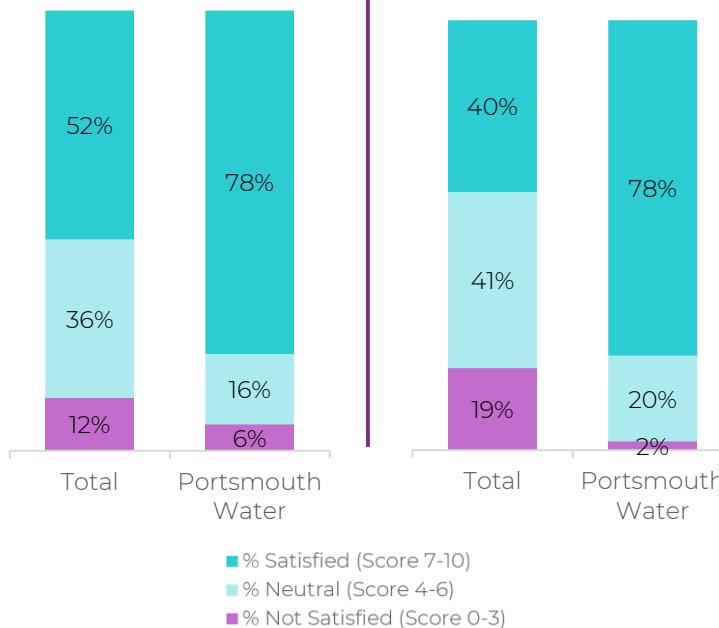
Active Community members
Total Base Size: 796
Portsmouth Water Base Size: 51



Portsmouth Water: Barometer Findings

78% are satisfied with Portsmouth Water overall
6% are not satisfied

Overall Satisfaction - Water



78% are satisfied with value for money
2% are not satisfied

Overall Value for Money Satisfaction

Overall satisfaction is extremely strong with above average scores across all key measures – value for money perceptions are also strong, outperforming the industry average by 38%.

Customers generally feel Portsmouth Water excels in providing a reliable, good quality and good value service with no notable issues.

Why have you given this overall satisfaction score on water?

"All our water comes from natural underground streams. It is fairly soft and tastes delicious"

*Female, 68,
lives with partner/spouse,
Portsmouth Water, 8/10
satisfaction score*

"Water quality and reliability have been consistently good, and I'm generally happy with the service."

Male, 35, lives with partner/spouse, Portsmouth Water, 8/10 satisfaction score

"They are investing for the future and water tastes great!"

*Male, 48, lives with child/children,
Portsmouth Water, 9/10 satisfaction score*

Satisfaction scores are industry leading across all measures, most notably around value for money perceptions. Focus should be on maintaining these high standards and sharing best practice within the industry.

Active Community members
Total Base Size: 796
Portsmouth Water Base Size: 51



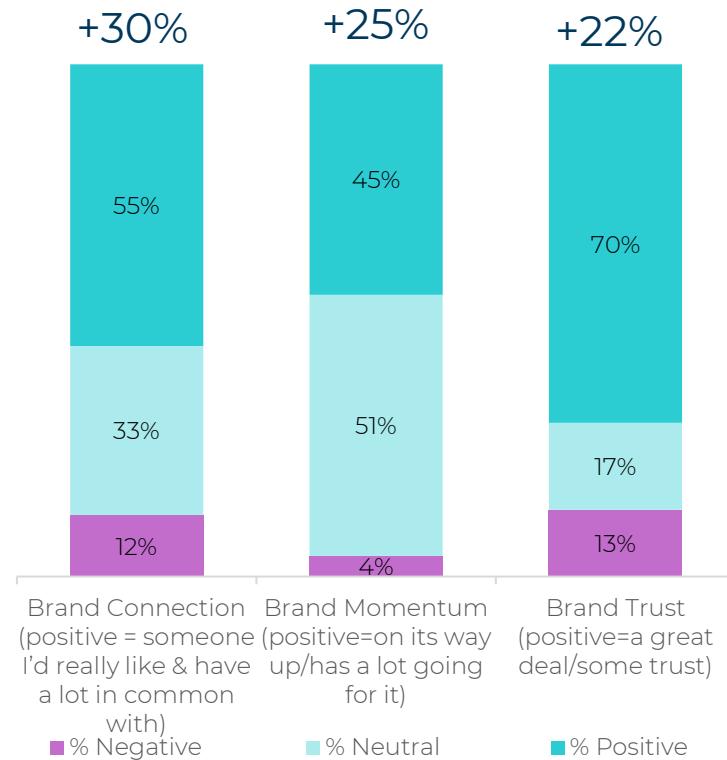
Portsmouth Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average

Perceptions of Portsmouth Water in relation to Connection, Momentum & Trust



% Who agree that Portsmouth Water...	+/ - Difference vs. Current Industry Average
Deliver great service for all customers	59% +17%
Improves our rivers	45% +24%
Creates a greener future	49% +25%
Spends customers' money wisely	45% +26%
Contributes to our communities	53% +26%

% Satisfied with...	+/ - Difference vs. Current Industry Average
Water	
Overall Satisfaction	78% +26%
Colour & Appearance	94% +12%
Taste & Smell	86% +11%
Safety of Drinking Water	90% +13%
Reliability of Supply	98% +11%
Water Pressure	94% +17%

Portsmouth Water scores strongly on all water satisfaction metrics, which drives powerful brand connection, momentum and trust scores.

Active Community members
Total Base Size: 796
Portsmouth Water Base Size: 51



Portsmouth Water: Spotlight Findings



Portsmouth Water customers value safe, high-quality drinking water and see this as a number 1 priority, followed by a need for Portsmouth Water to do what they can to reduce leaks in the system and upgrade water mains and pipes for a reliable supply.

Ranking Customer Priorities

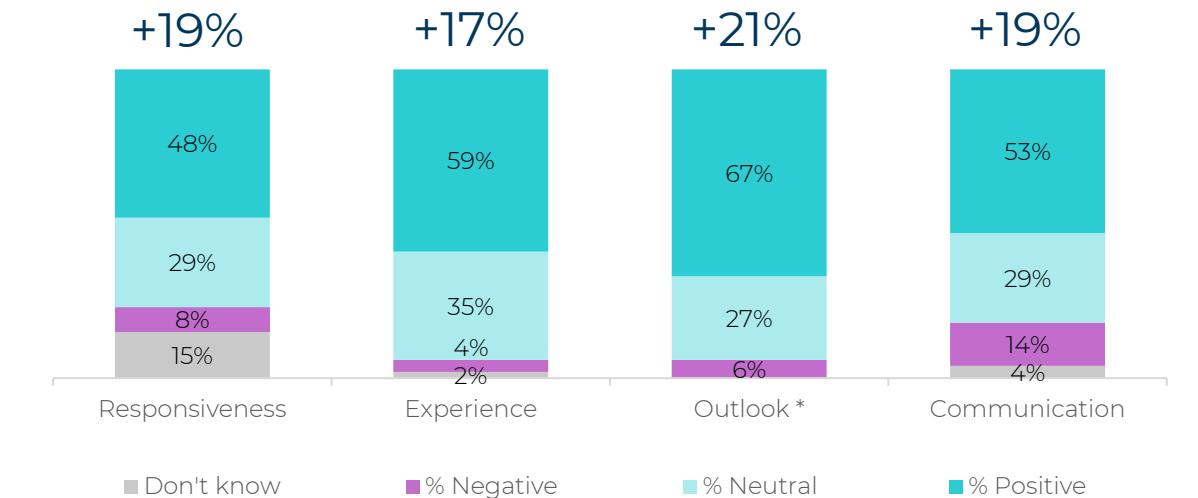
% Very Important

Water

1. Safe drinking water: 94%
2. Reducing leaks: 85%
3. Upgrading water mains and pipes for a reliable supply: 75%

+/- Difference (positive) vs. Current Industry Average

Perceptions of Portsmouth Water in relation to Responsiveness, Experience, Outlook & Communication



Responsiveness, experience, outlook and communication all score well above the industry average, reinforcing strong brand trust and satisfaction. Key opportunity is to keep communication aligned to customer priorities, such as water quality and reducing leaks. Portsmouth Water Base Size: 51

Active Community members
Total Base Size: 796
Portsmouth Water Base Size: 51



Portsmouth Water: Spotlight Findings

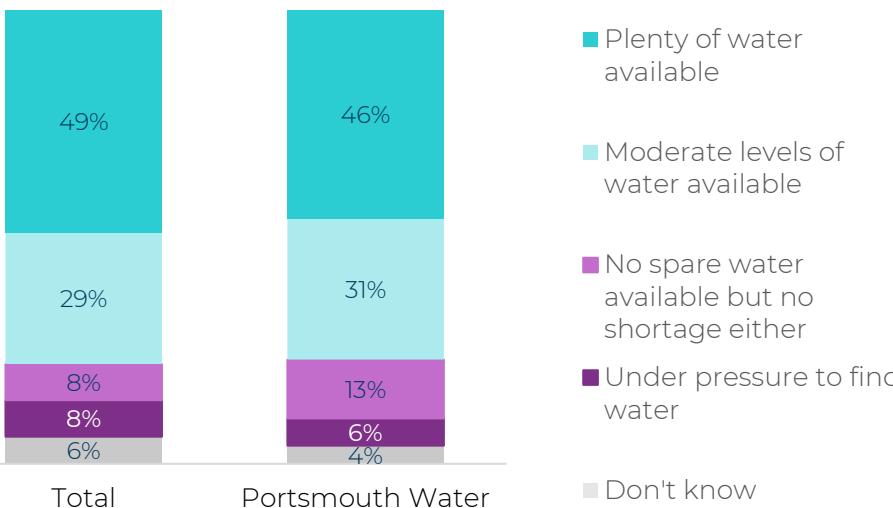
Processes & Resources



Water Resources

Portsmouth Water customers believe there is plenty of water or a moderate level of water available in their area. As a community, most claim to feel somewhat informed on the water treatment process.

Perceived Water Availability



Water Process

54% of consumers say they know a lot or a little about the water process (+3%)

46% don't know much or know nothing about it (-3%)

"I think we take it for granted - or choose not to think about it. I think as users we should probably accept/take some responsibility for knowing more!"

Female, 63, lives with partner/spouse, Portsmouth Water Customer

Portsmouth Water customers report similar levels of water availability and understanding of the water process as the wider community, suggesting scope to deepen engagement on how the company is improving resilience to future water scarcity.

Active Community members
Total Base Size: 796
Portsmouth Water Base Size: 51



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

South East Water

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

South East Water

Community population

south east water

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South East Water Community members:

n=54

Inclusivity

Ethnic Minority Background

Rural Representation

Accessibility Needs

Financially Vulnerable

Household income

Prefer not to say

£60k plus

£40k-£60k

£20k-£40k

Under £20k

Gender

30

24

23

23

Male

24

23

Female

Age

Age 75+

Age 65 to 74

Age 55 to 64

Age 45 to 54

Age 35 to 44

Age 25 to 34

Age 18 to 24

3

6

5

6

6

6

3

1

Attitude to Water company

9

8

Negative

23

8

Neutral

22

8

Positive

Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 18-24 & 75+ sample by at least 2 for next month.

Current Quota

Minimum Quota

Dashboard Summary

south east water

ccw
The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	South East Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	25%	-4%
	Recent Experience (Positive recent experience)	42%	28%	-14%
	General outlook (Positive outlook)	46%	40%	-6%
	Communication (Fair/good communication)	34%	34%	0%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	24%	-1%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	16%	-4%
	Trust (a great deal/some trust)	48%	39%	-9%
	Past 4 Week Interaction	39%	39%	0%
	Past 4 Week Disruption	5%	9%	+4%
	Past 4 Week Water Quality Issues	7%	8%	+1%
	Past 4 Week Sewerage issues	2%	6%	+4%
	Overall Value for Money	40%	31%	-9%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	37%	-15%
	Colour & Appearance	82%	76%	-6%
	Taste & Smell	75%	74%	-1%
	Safety of Drinking Water	77%	76%	-1%
	Reliability of Supply	87%	78%	-9%
	Water Pressure	77%	74%	-3%

KEY:
% difference +10%
above Average
% difference -10%
below Average

Active Community members n= 796
South East Water Community members n=54.

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction is lower than average, influenced by weaker value for money perceptions and slightly lower reliability scores. South East Water need to reinforce confidence in everyday service performance and strengthen value perceptions through clearer billing communication.
- South East Water brand connection scores are aligned with industry averages, but lower service delivery measures are contributing to a lower trust score.

Spotlight



- South East Water tracks close to industry averages on responsiveness and outlook, but weaker recent experience scores indicate room for improvement, and communication at benchmark levels suggests scope to share updates more effectively.
- South East Water customers are significantly more aware of water scarcity in their region than average. Communication opportunity: Educate customers on how South East Water are making the water infrastructure more resilient to water scarcity issues and drought.

south east water

ccw
The voice for water consumers
Llais defnyddwyr dŵr

As a customer, overall, how satisfied are you with South East Water?

5.73/10 vs 6.26/10 (total)

Why do South East Water customers feel this way?

Customers say they generally have no major issues with their water supply and are positive about water quality and service when problems are resolved quickly. Many feel that frequent leaks, rising bills, slow repairs in some areas, and limited communication about improvements need attention.

 **Accountability call out:** We are currently exploring the need for a potential ad-hoc Accountability Session in January 2026. Once all community feedback has been fully reviewed, we will determine whether to move to the next stage - inviting our South East Water community to consider whether South East Water should be asked to set out how they intend to address the issues experienced in Tunbridge Wells.

Active Community members
Total Base Size: 796
South East Water Base Size: 54



South East Water: Barometer Findings

37% are satisfied with South East Water overall
18% are not satisfied

Overall Satisfaction - Water



Overall satisfaction is lower than the industry average and while value for money perceptions do not fall below benchmark levels, they may be contributing to these lower satisfaction scores.

Water quality measures are average, but reliability of supply is one key factor that also accounts for these slightly lower scores.

Why have you given this overall satisfaction score on water?

“They need to tell us more about what they are spending money on as people just see the issues”

Female, 46, lives with partner/spouse, South East Water, 2/10 satisfaction score

“The bills keep going up but there are still lots of leaks everywhere.”

Female, 45, lives with partner/spouse, South East Water, 5/10 satisfaction score

“Doing well with lots of local projects and always supplied good drinking water.”

Male, 46, lives with partner/spouse, South East Water, 8/10 satisfaction score

Satisfaction is lower than average, influenced by weaker value for money perceptions and slightly lower reliability scores. South East Water need to reinforce confidence in everyday service performance and strengthen value perceptions through clearer billing communication.

Active Community members
Total Base Size: 796
South East Water Base Size: 54

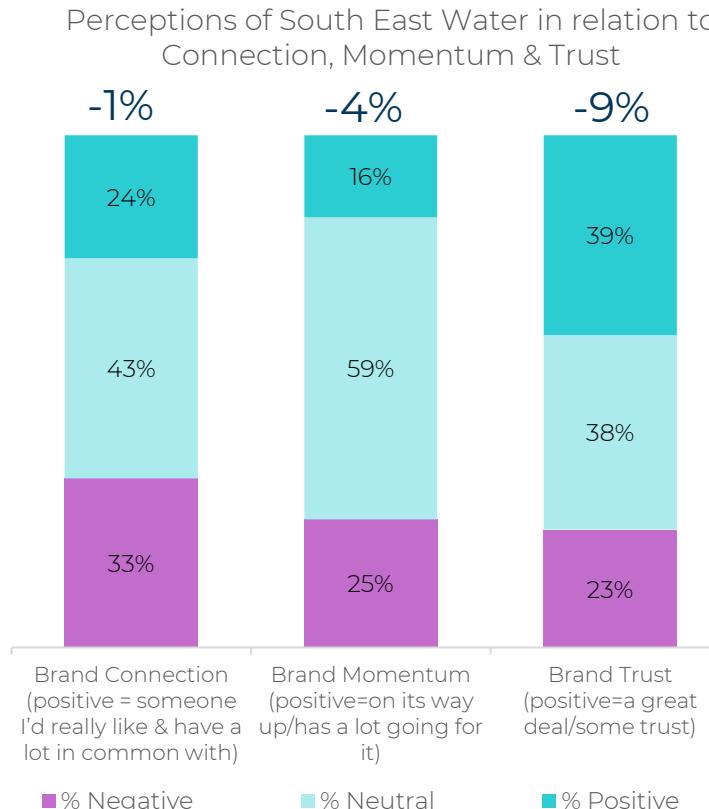


South East Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average



% Who agree that South East Water...	+/- Difference vs. Current Industry Average
Deliver great service for all customers	33%
Improves our rivers	23%
Creates a greener future	24%
Spends customers' money wisely	20%
Contributes to our communities	26%

% Satisfied with...	+/- Difference vs. Current Industry Average
Water	
Overall Satisfaction	37%
Colour & Appearance	76%
Taste & Smell	74%
Safety of Drinking Water	76%
Reliability of Supply	78%
Water Pressure	74%

South East Water brand connection scores are aligned with industry averages, but lower service delivery measures are contributing to weaker brand trust.

Active Community members
Total Base Size: 796
South East Water Base Size: 54



South East Water: Spotlight Findings



South East Water customers value safe, high-quality drinking water and perceive this to be a number one priority, followed by a need for South East Water to do what they can to reduce leaks in the system and upgrade water mains and pipes for a reliable supply.

Ranking Customer Priorities

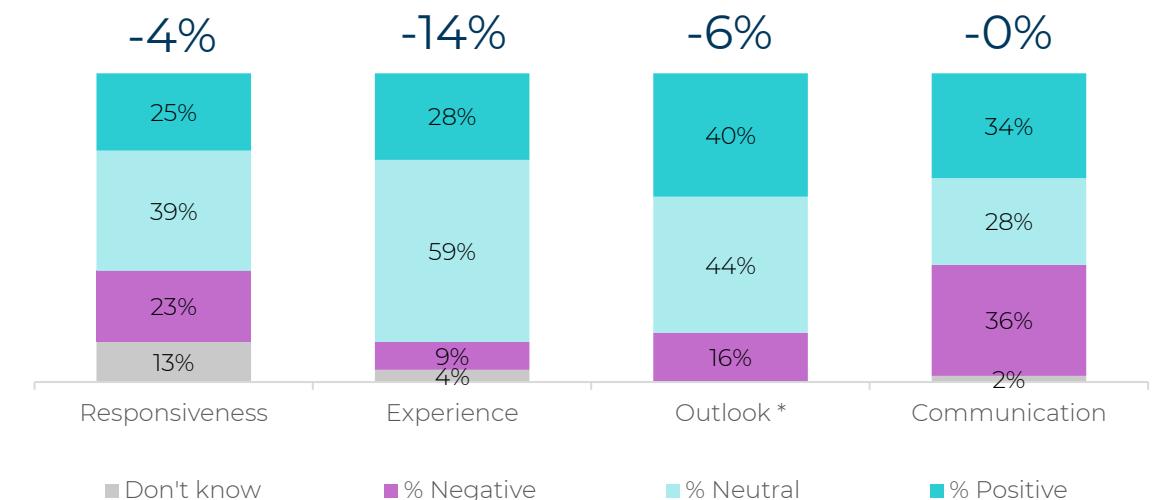
% Very Important

Water

1. Safe drinking water: 93%
2. Reducing leaks: 84%
3. Upgrading water mains and pipes for a reliable supply: 86%

+/- Difference (positive) vs. Current Industry Average

Perceptions of South East Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

South East Water tracks close to industry averages on responsiveness and outlook, but weaker recent experience scores indicate room for improvement, and communication at benchmark levels suggests scope to share updates more effectively.

Active Community members
Total Base Size: 796
South East Water Base Size: 54



South East Water: Spotlight Findings

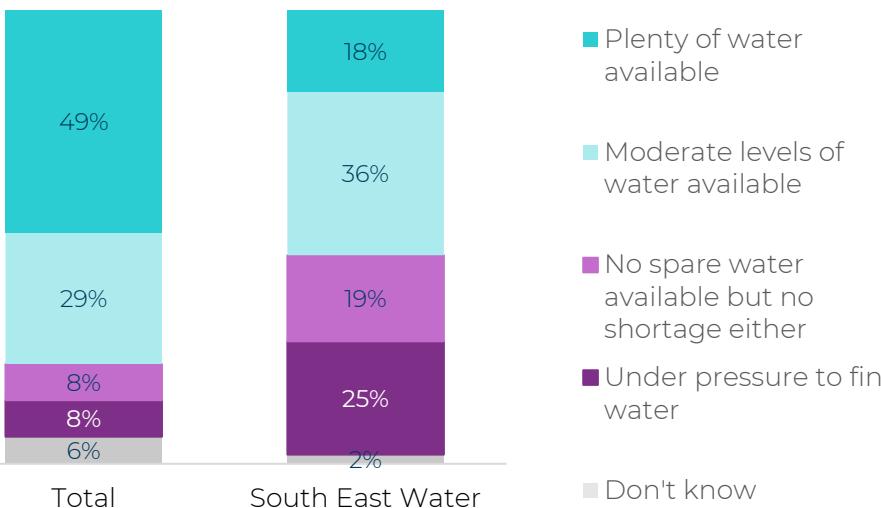
Processes & Resources



Water Resources

South East Water customers are much less likely to feel there is plenty of water available locally, with 25% (vs 8% industry average) believing their area is under pressure to find water.

Perceived Water Availability



Water Process

55% of consumers say they know a lot or a little about the water process (+4%)

45% don't know much or know nothing about it (-4%)

"I was surprised by how detailed and rigorous the procedures are. It's reassuring to know that the water I drink and use is being thoroughly treated"

Female, 33, Lives alone, South East Water Customer

South East Water customers are significantly more aware of water scarcity in their region than average. Communication opportunity: Educate customers on how South East Water are making the water infrastructure more resilient to water scarcity issues and drought.

Active Community members
Total Base Size: 796
South East Water Base Size: 54



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

South Staffs Water and Cambridge Water

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

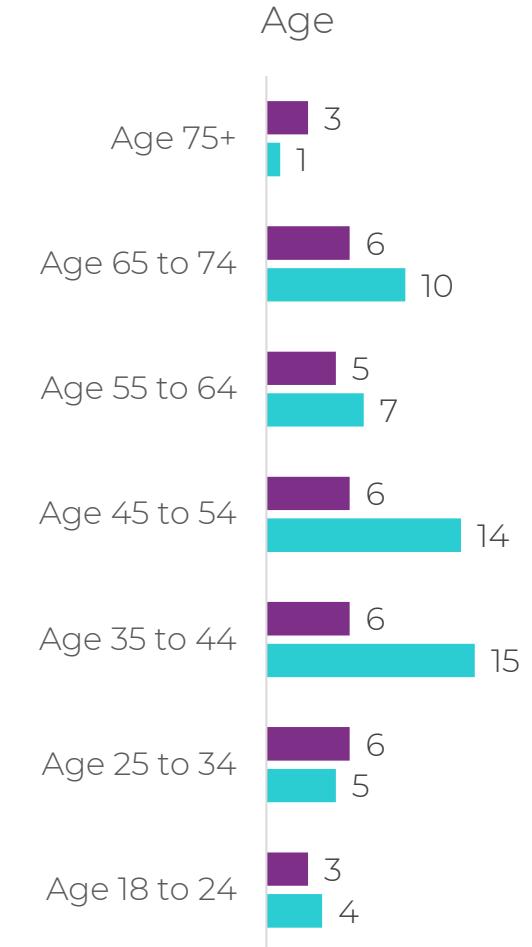
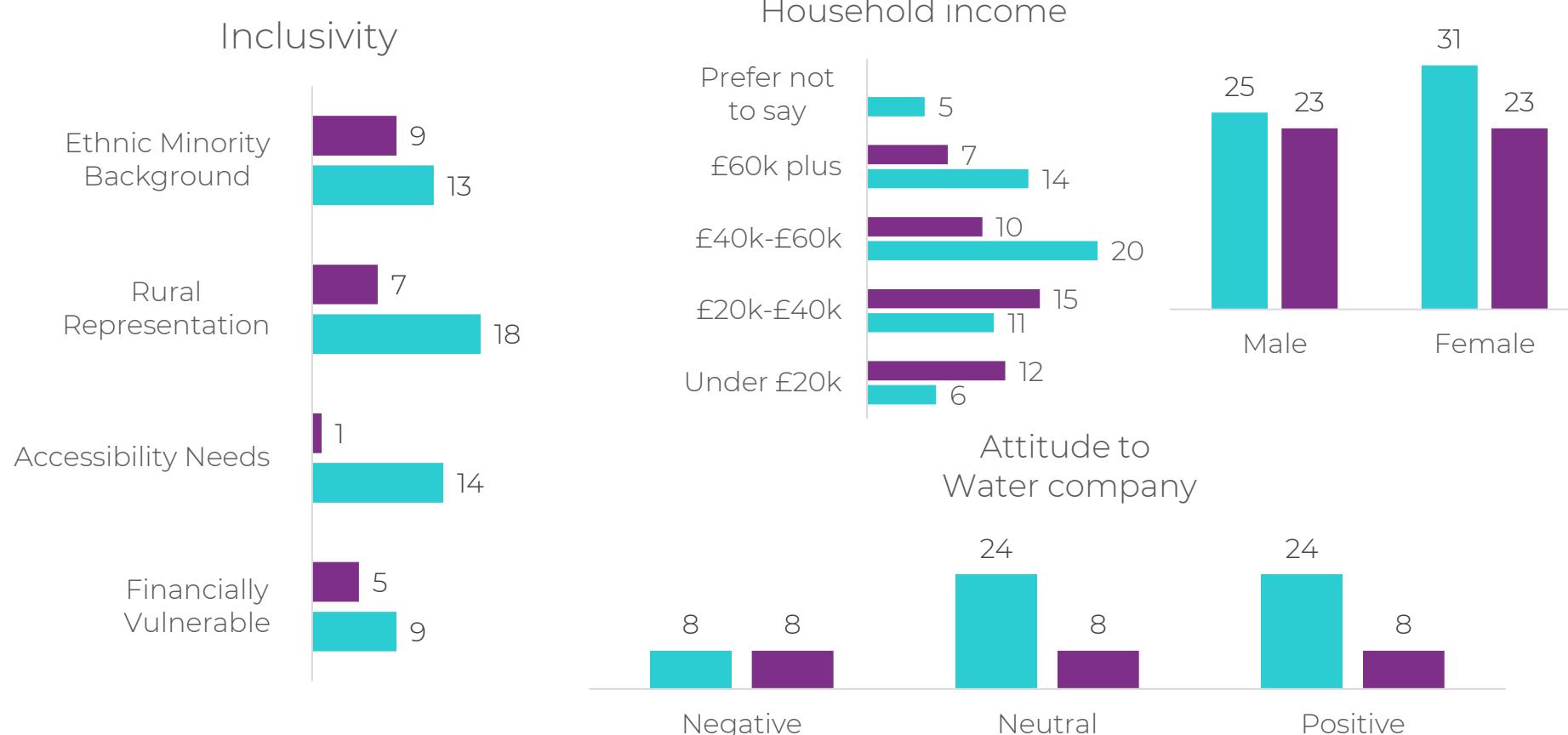
South Staffs Water and Cambridge Water

Community population



South Staffs Water Community members: n=33

Cambridge Water Community members: n=23



Sample note: We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 75+ sample by at least 2 for next month.

Current Quota

Minimum Quota

Dashboard Summary



	Topic	Agreement % for total sample	South Staffs Water and Cambridge Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	26%	-3%
	Recent Experience (Positive recent experience)	42%	37%	-5%
	General outlook (Positive outlook)	46%	49%	+3%
	Communication (Fair/good communication)	34%	18%	-16%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	21%	-4%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	9%	-11%
	Trust (a great deal/some trust)	48%	52%	4%
	Past 4 Week Interaction	39%	29%	-10%
	Past 4 Week Disruption	5%	5%	0%
	Past 4 Week Water Quality Issues	7%	9%	+2%
	Past 4 Week Sewerage issues	2%	6%	+4%
	Overall Value for Money	40%	45%	+5%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	64%	+12%
	Colour & Appearance	82%	88%	+6%
	Taste & Smell	75%	80%	+5%
	Safety of Drinking Water	77%	82%	+5%
	Reliability of Supply	87%	88%	+1%
	Water Pressure	77%	73%	-4%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members n= 796
 South Staffs Water and Cambridge Water
 Community members n=56.

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction and value for money both sit above the industry average, supported by reliable day-to-day service. There remains an opportunity to strengthen value perceptions further through clearer communication about what each company is delivering.
- South Staffs Water and Cambridge Water perform well on brand connection and trust, but brand momentum is lower than average with the majority of customers providing a neutral response.

Spotlight



- Overall scores broadly match industry levels, but weaker communication scores highlight an opportunity to provide clearer updates on progress and priorities.
- Water availability perceptions align with industry levels, but lower understanding of the water process highlights an opportunity to positively engage with customers and provide clearer communication in this area.



As a customer, overall, how satisfied are you with South Staffs Water and Cambridge Water?

6.88/10 vs 6.26/10 (total)

Why do customers feel this way?

Customers describe South Staffs and Cambridge Water as reliable and problem-free with good-quality water and helpful service, though some note rising bills and occasional supply issues, and would welcome clearer updates about what the company is doing.



Accountability call out: There are currently **no** ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

Active Community members
Total Base Size: 796
South Staffs Water and Cambridge Water Base Size: 56



South Staffs Water and Cambridge Water : Barometer Findings



64% are satisfied with South Staffs Water and Cambridge Water overall
7% are not satisfied

Overall Satisfaction - Water



45% are satisfied with value for money
14% are not satisfied

Overall Value for Money Satisfaction



Satisfaction with South Staffs and Cambridge Water is above the industry average, with most customers feeling they receive a reliable, good-quality service with few day-to-day issues.

Value for money perceptions are also above average with a lower percentage of customers rating this as unsatisfactory than industry standard.

Why have you given this overall satisfaction score on water?

"Had no issues with service or billing, saw something about environment from them recently. Would like to see more"

Male, 45, Lives with partner/spouse, South Staffs Water and Cambridge Water, 8/10 satisfaction score

"I have very few issues with my water supply and the quality is generally very good."

Male, 66, Lives with partner/spouse, South Staffs Water and Cambridge Water, 3/10 satisfaction score

"The bills have gone up but not sure what they are doing with the extra money."

Female, 68, Lives with partner/spouse, South Staffs Water and Cambridge Water, 3/10 satisfaction score

Satisfaction and value for money both sit above the industry average, supported by reliable day-to-day service. There remains an opportunity to strengthen value perceptions further through clearer communication about what each company is delivering.

Active Community members
Total Base Size: 796
South Staffs Water and Cambridge Water Base Size: 56

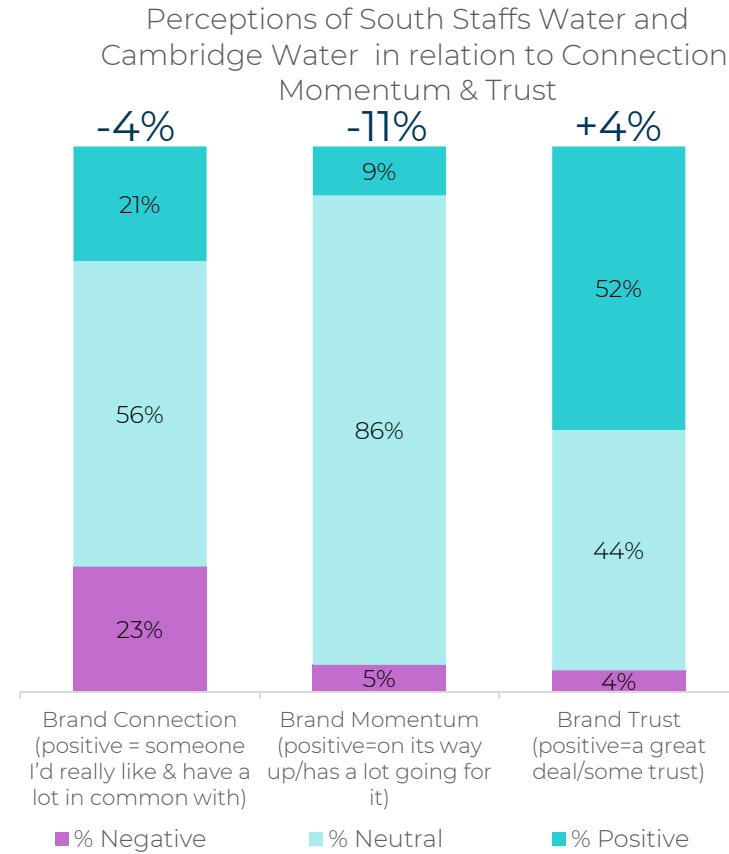


South Staffs Water and Cambridge Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average



% Who agree that South Staffs Water and Cambridge Water...	+/- Difference vs. Current Industry Average
Deliver great service for all customers	39% - 3%
Improves our rivers	13% - 8%
Creates a greener future	20% - 4%
Spends customers' money wisely	9% - 10%
Contributes to our communities	18% - 9%

% Satisfied with...	+/- Difference vs. Current Industry Average
Water	
Overall Satisfaction	64% +12%
Colour & Appearance	88% +6%
Taste & Smell	80% +5%
Safety of Drinking Water	82% +5%
Reliability of Supply	88% +1%
Water Pressure	73% - 4%

South Staffs Water and Cambridge Water perform well on brand connection and trust, but brand momentum is lower than average with the majority providing a neutral response

Active Community members
Total Base Size: 796
South Staffs Water and Cambridge Water Base Size: 56



South Staffs Water and Cambridge Water: Spotlight Findings



South Staffs Water and Cambridge Water value safe, high-quality drinking water and see this as a number 1 priority, followed by a need for to do what they can to reduce leaks in the system and upgrading water mains and pipes.

Ranking Customer Priorities

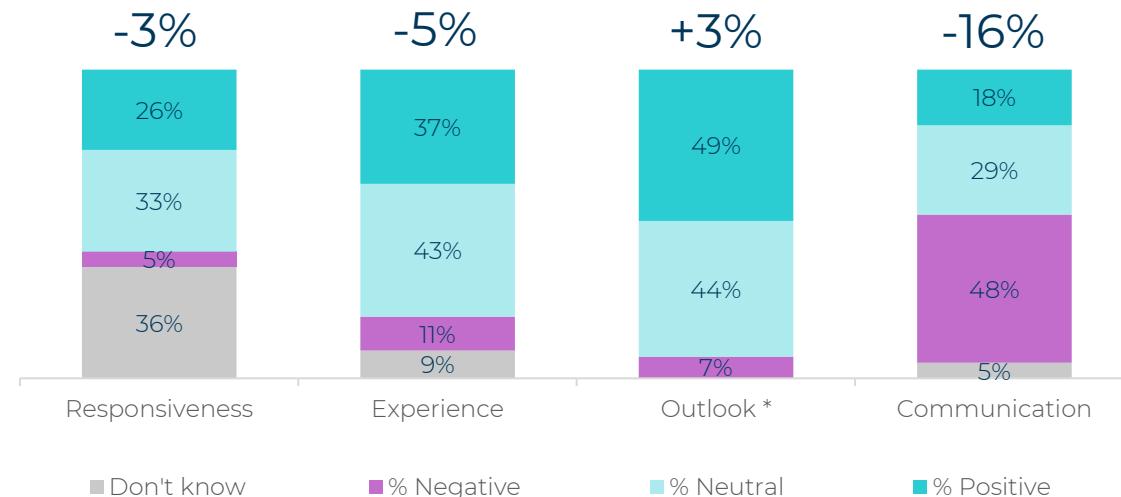
% Very Important

Water

1. Safe drinking water: 100%
2. Reducing leaks: 79%
3. Upgrading water mains and pipes for a reliable supply: 77%

+/- Difference (positive) vs. Current Industry Average

Perceptions of South Staffs Water and Cambridge Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

Overall scores broadly match industry levels, but weaker communication scores highlight an opportunity to provide clearer updates on progress and priorities.

Active Community members
Total Base Size: 796
South Staffs Water and Cambridge Water Base Size: 56

South Staffs Water and Cambridge Water: Spotlight Findings

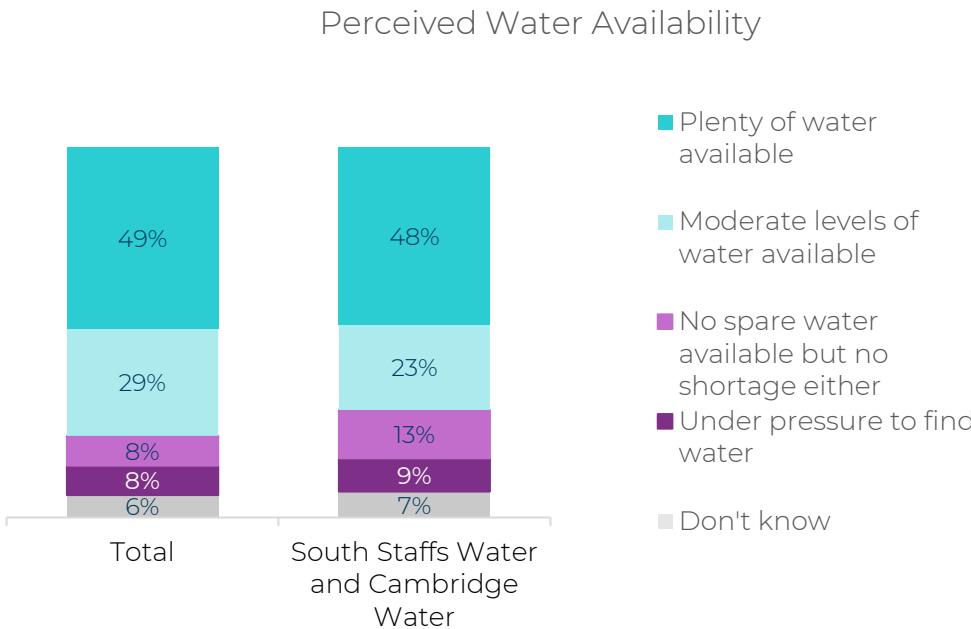


Processes & Resources



Water Resources

South Staffs Water and Cambridge Water customers think there is plenty of water or moderate levels of water available, aligning with industry averages. As a community they are slightly less informed on the water treatment process.



Water Process

45% of South Staff and Cambridge Water consumers say they **know a lot or a little** about the water process (-6%)

55% **don't know much or know nothing** about it (+6%)

"I wish there were maybe more posters to let people know what happens to their water. After reading the process I could see people maybe feeling more conscious of their water use (I know I do).!"

Female, 20, Living with other adult family, South Staffs Water and Cambridge Water Customer

Water availability perceptions align with industry levels, but lower understanding of the water process highlights an opportunity to positively engage with customers and provide clearer communication in this area.

Active Community members
Total Base Size: 796
South Staffs Water and Cambridge Water Base Size: 56



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice Barometer & Spotlight Report

SES Water

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

SES Water Community members: n=48

Inclusivity

Ethnic Minority Background: Current Quota 12, Minimum Quota 9

Rural Representation: Current Quota 14, Minimum Quota 7

Accessibility Needs

Financially Vulnerable: Current Quota 9, Minimum Quota 5

Household income

Prefer not to say	4
£60k plus	7
£40k-£60k	10
£20k-£40k	15
Under £20k	12

Gender

Male	23
Female	25

Age

Age 75+	1	3
Age 65 to 74	5	6
Age 55 to 64	9	5
Age 45 to 54	9	6
Age 35 to 44	12	6
Age 25 to 34	10	6
Age 18 to 24	2	3

Attitude to Water company

Negative	7	8
Neutral	18	8
Positive	23	8

Sample note: We have met over 90% of our minimum sample quotas. N.B. Our lowest household income target is lower than the minimum quota, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our Male, 18-24 & 65+ sample by at least 3 for next month.

Current Quota

Minimum Quota

Dashboard Summary



The voice for water consumers
Llais defnyddwyr dŵr

	Topic	Agreement % for total sample	SES Water	+/- difference vs. Current Industry Average
Spotlight	Responsiveness (Always/often responsive)	29%	42%	+13%
	Recent Experience (Positive recent experience)	42%	52%	+10%
	General outlook (Positive outlook)	46%	54%	+8%
	Communication (Fair/good communication)	34%	36%	+2%
Barometer	Brand Connection (someone I'd really like & have a lot in common with)	25%	35%	+10%
	Brand Momentum (salience) (on its way up/has a lot going for it)	20%	31%	+11%
	Trust (a great deal/some trust)	48%	54%	+6%
	Past 4 Week Interaction	39%	33%	-6%
	Past 4 Week Disruption	5%	8%	+3%
	Past 4 Week Water Quality Issues	7%	10%	+3%
	Past 4 Week Sewerage issues	2%	2%	0%
	Overall Value for Money	40%	48%	+8%
	Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	58%	+6%
	Colour & Appearance	82%	79%	-3%
	Taste & Smell	75%	69%	-6%
	Safety of Drinking Water	77%	71%	-6%
	Reliability of Supply	87%	81%	-6%
	Water Pressure	77%	73%	-4%

KEY:
 % difference +10% above Average
 % difference -10% below Average

Active Community members n= 796
 SES Water Community members n=48.

Executive Summary

Overview of Key Findings

Barometer



- Satisfaction and value for money scores are sitting above industry average with a small minority of customers 'unsatisfied' on these key measures. High neutral scores suggest there is scope to build greater consumer confidence around bills and service delivery.
- SES Water score above average on all brand perception metrics, improving water quality performance should help to further increase the brand trust measure.

Spotlight



- Perceptions of SES Water are strong overall, with positive ratings across responsiveness, experience and outlook all sitting above the current industry average. While above average, communication is the area with the most room for improvement to strengthen trust scores
- SES Water customers feel broadly confident about water availability, but lower knowledge of the water process highlights a need for more communication on how SES Water manages treatment and drought resilience.



As a customer, overall, how satisfied are you with SES Water?

6.78/10 vs 6.26/10 (total)

Why do SES water customers feel this way?

Customers describe SES Water as generally reliable, with clean water and few interruptions, but also highlight rising bills, occasional pressure or leakage issues, and a need for clearer, more consistent communication.



Accountability call out: There are currently no ad-hoc accountability session triggers in discussion across the surveys, community and CCW's external insights.

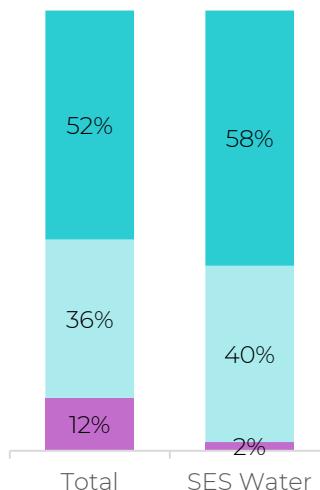
Active Community members
Total Base Size: 796
SES Water Base Size: 48



SES Water: Barometer Findings

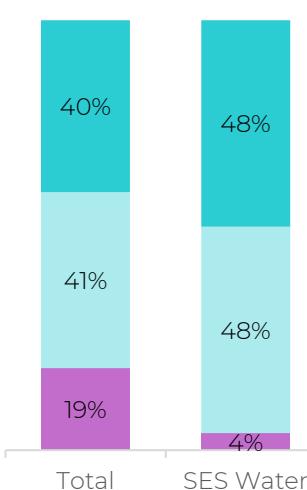
58% are satisfied with SES Water overall
2% are not satisfied

Overall Satisfaction - Water



48% are satisfied with value for money
4% are not satisfied

Overall Value for Money Satisfaction



Satisfaction scores are above average with very few customers claiming they are unsatisfied with the service SES provides.

Customers generally feel SES Water provides value for money, but high neutral scores suggest there is scope to improve consumer confidence and visibility around SES priorities and billing.

Why have you given this overall satisfaction score on water?

“They’re generally reliable, the water quality is good, and any issues I’ve had were resolved reasonably quickly.”

Male, 30,
Lives with other adult family,
SES, 8/10 satisfaction score

“I don’t have much of an expectation, I pay my bill and my water services are provided. It’s very transactional.”

Female 34, Lives with
partner/spouse, SES Water,
8/10 satisfaction score

“Service is generally good, expensive like all bills currently, worried if they pollute as well as Thames Water around Surrey.”

Female, 46, Lives with
partner/spouse, SES Water,
3/10 satisfaction score

Satisfaction and value for money scores are sitting above industry average with a small minority of customers ‘unsatisfied’ on these key measures. High neutral scores suggest there is scope to build greater consumer confidence around bills and service delivery.

Active Community members
Total Base Size: 796
SES Water Base Size: 48

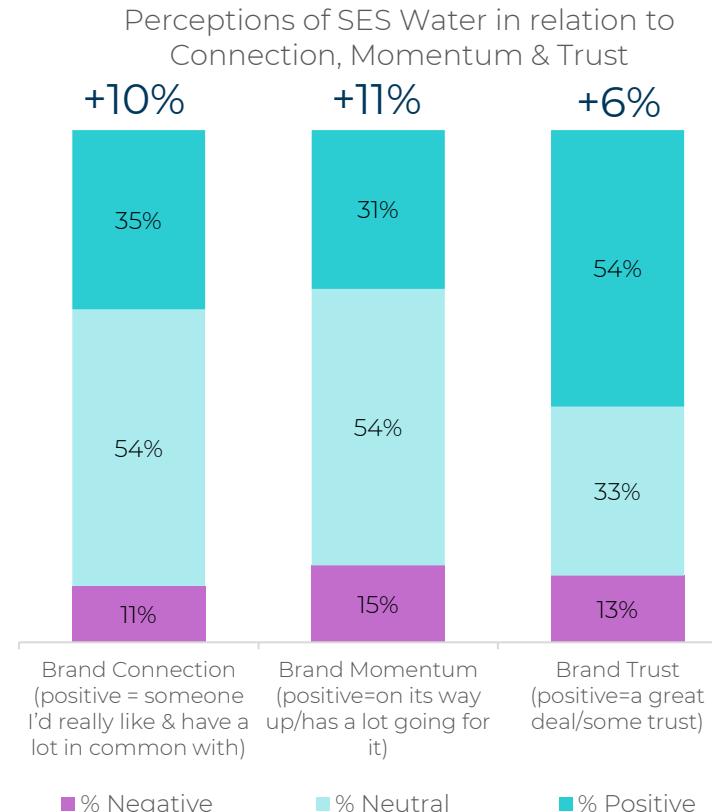


SES Water: Barometer Findings

Brand perceptions & performance (satisfaction)



+/- Difference (positive) vs. Current Industry Average



% Who agree that SES Water...	+/- Difference vs. Current Industry Average
Deliver great service for all customers	50% +8%
Improves our rivers	25% +4%
Creates a greener future	37% +13%
Spends customers' money wisely	25% +6%
Contributes to our communities	33% +6%

% Satisfied with...	+/- Difference vs. Current Industry Average
Water	
Overall Satisfaction	58% +6%
Colour & Appearance	79% -3%
Taste & Smell	69% -6%
Safety of Drinking Water	71% -6%
Reliability of Supply	81% -6%
Water Pressure	73% -4%

SES Water score above average on all brand perception metrics, improving water quality performance should help to further increase other metrics.

Active Community members
Total Base Size: 796
SES Water Base Size: 48



SES Water: Spotlight Findings

SES Water customers value safe, high-quality drinking water and see this as a number 1 priority, followed by a need for SES water to do what they can to reduce leaks in the system and upgrade water mains and pipes.

Ranking Customer Priorities

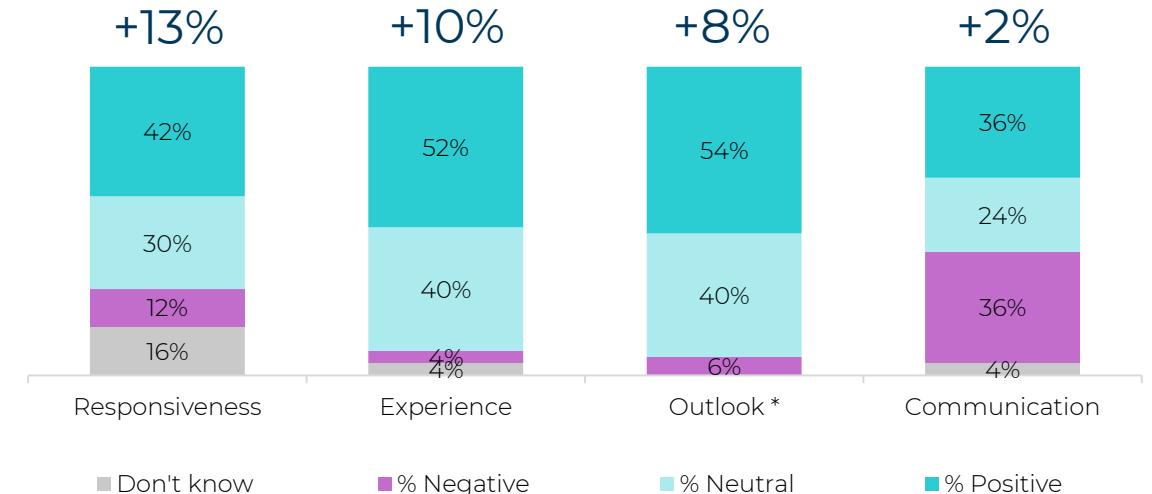
% Very Important

Water

1. Safe drinking water: 94%
2. Reducing leaks: 86%
3. Upgrading water mains and pipes for a reliable supply: 70%

+/- Difference (positive) vs. Current Industry Average

Perceptions of SES Water in relation to Responsiveness, Experience, Outlook & Communication



*Which statement best describes your general outlook on {water company}

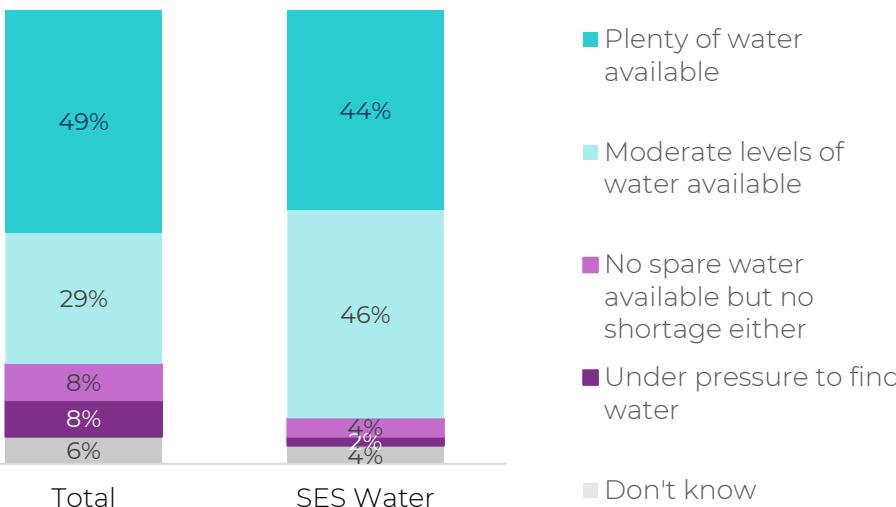
Perceptions of SES Water are strong overall, with positive ratings across responsiveness, experience and outlook all sitting above the current industry average. While above average, communication is the area with the most room for improvement to strengthen trust scores.

Active Community members
Total Base Size: 796
SES Water Base Size: 48

Water Resources

SES Water customers are slightly less likely to think there is plenty of water available in their area. As a community they are slightly more informed on the water treatment process.

Perceived Water Availability



Water Process

56% of consumers say they **know a lot or a little** about the water process (+5%)

44% **don't know much or know nothing** about it (-5%)

"The process is very robust, would welcome more information at each stage about the risk management and monitoring processes in place to ensure it all runs safely to protect consumers and the environment."

*Male, 43, living with partner/spouse,
SES Water Customer*

SES Water customers feel broadly confident about water availability, but lower knowledge of the water process highlights a need for more communication on how SES Water manages treatment and drought resilience.

Active Community members
Total Base Size: 796
SES Water Base Size: 48

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The voice for water consumers
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