



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice

'Getting to know you' report

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

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Our Research Approach



Objectives & Methodology



Objectives

The *Getting to Know You* survey provides the foundational profile of each Water Voice community list, capturing who they are, how they use water, and what matters most to them.

It gathers key demographic, behavioural, attitudinal, and accessibility information to ensure each community is inclusive, balanced and representative of diverse lived experiences.

The survey also sets baseline measures on trust, usage, priorities, and service experience that will help interpret the Barometer and Spotlight findings* over the year. The key objectives are to:

1. Understand who community members are
2. Build a picture of household water behaviour
3. Understand broader priorities and attitudes
4. Identify accessibility and support needs
5. Understand prior experience with water services
6. Establish a baseline for trust, satisfaction and expectations

Methodology

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

- Insights are collected through an initial *Getting to Know You* survey to allow us to understand each community in greater detail.

The survey took 10-15 minutes to complete, and the majority completed this online with some preferring to complete over the phone. All surveys were completed within the month of November 2025.

* Our Barometer & Spotlight survey findings can be found within the reports on the CCW webpage:

<https://www.ccw.org.uk/our-work/consumer-panels/>

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.

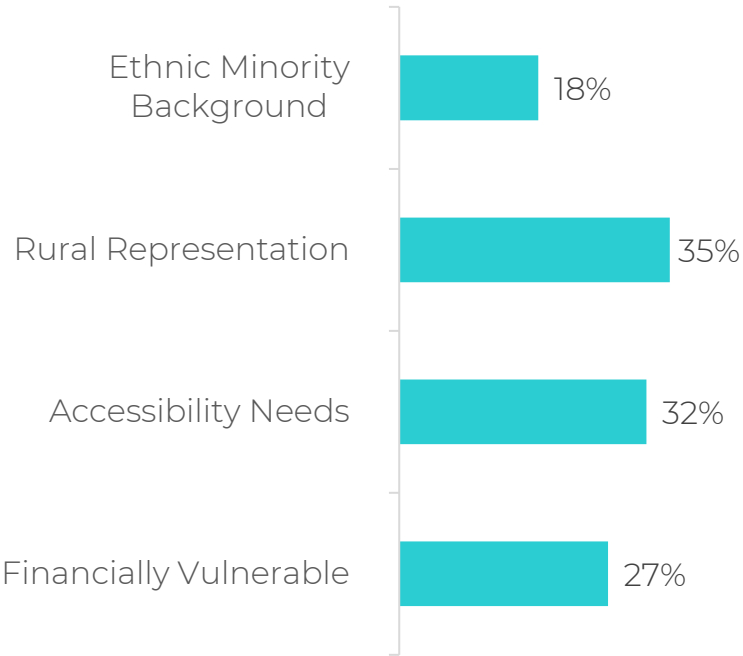
Sample

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

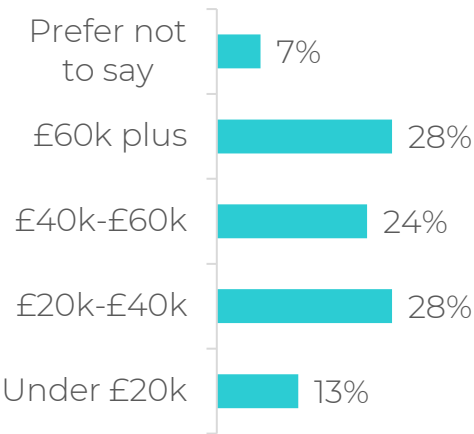


830 members onboarded
755 actively participated

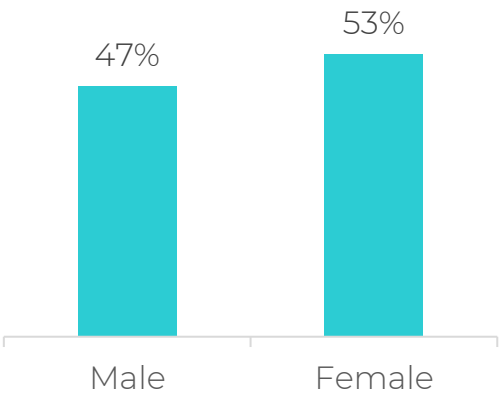
Inclusivity



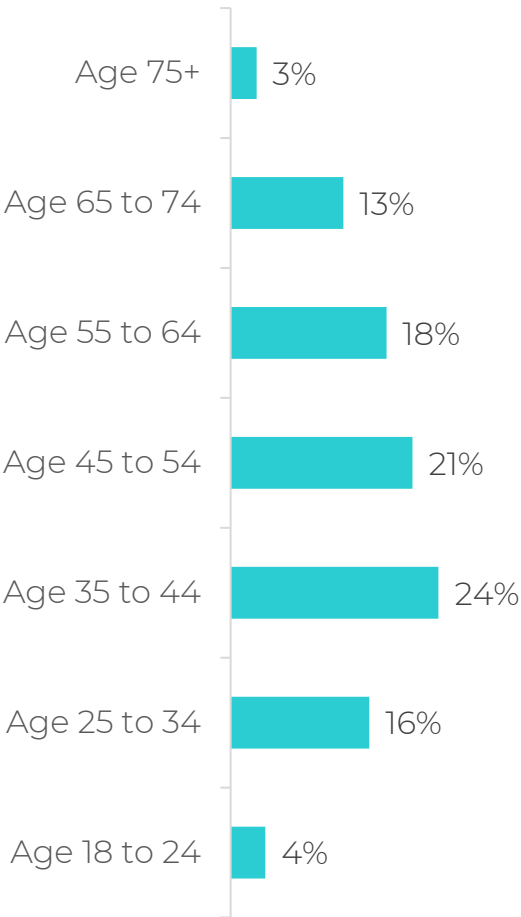
Household income



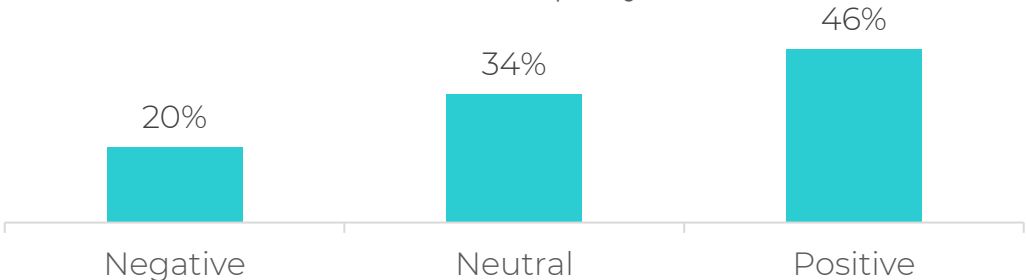
Gender



Age



Attitude to Water company



Water Voice

What do our community members hope being part of Water Voice achieves?



Our community members want to take part so they can have their voices heard, influence improvements to water services and the environment, learn more about how water companies operate, share personal experiences, and contribute to positive change; often motivated too by curiosity, community spirit, and the financial incentives.

Turning community member voices into real action and improvement through:

- **Influencing change:** Our community members want their voices heard and for water companies to act on community members' concerns.
- **Better service & communication:** Clear expectations for improved reliability, communication, and water quality.
- **Greater accountability:** Desire for companies to listen, act, and show transparency in their decisions.
- **Environmental progress:** Calls for less sewage discharge and more sustainable water management.
- **Constructive dialogue:** Hope for genuine two-way engagement and practical solutions.

“ What community members have said...

“Give a voice to the ordinary citizen over how the water companies treat their customers concerns with regard to all issues concerning water.” Male, 66, Lives alone, Portsmouth Water

“I want to ensure my water company feels pressure to improve and be transparent.” Female, 29, Lives with child/children, Southern Water

“A better understanding of what we’re paying for and how services will improve.” Female, 36, Lives with partner and child/children, United Utilities

“Tangible results - cleaner water and less sewage dumping.” Male, 65, Lives with partner, Wessex Water



Our community members want their voices to drive real action. They want the communities to lead to improvements in services and communication, strengthen accountability and transparency, advance environmental protection, and foster a genuine two-way dialogue that leads to practical, positive change.

Active community members (Base size) 755



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Water Voice 'Getting to know you' Report

Anglian Water
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Delivered by Taylor McKenzie
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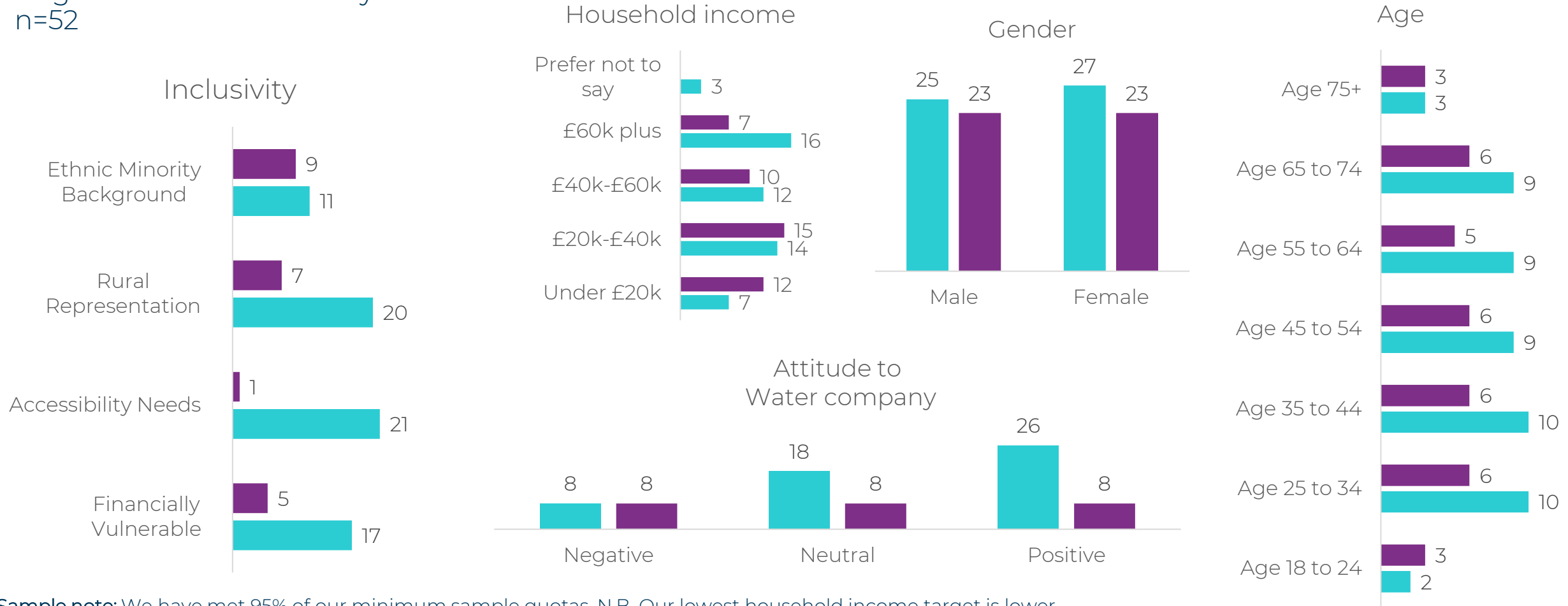
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Anglian Water

Community population



Anglian Water community members:
n=52



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 we were able to reach our financially vulnerable community members by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. 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

Anglian Water

What do Anglian Water community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Being heard & influencing change:** ensure community member voices genuinely influence decisions, driving improvements.
- **Better service, infrastructure & reliability:** clear expectations for improved reliability, communication, and water quality.
- **Greater accountability:** desire for companies to listen, act, and show transparency in their decisions.
- **Environmental progress:** calls for less sewage discharge and more sustainable water management.
- **Constructive dialogue:** hope for genuine two-way engagement and practical solutions.



What Anglian Water community members have said...

"I would like to make a positive change within the water industry." Female, 46, Lives with partner and children

"Hopefully they will get lots of ideas and suggestions on how to help water companies to improve and provide better services to consumers." Female, 56, Lives Alone

"Takes action and makes the investment required to safeguard water supplies & prevent discharges or untreated water, for good." Male, 55, Lives with partner

"We are real people hopefully from different backgrounds, experiences and stages of life so hoping our stories and experiences makes some improvements." Female, 66, Lives alone



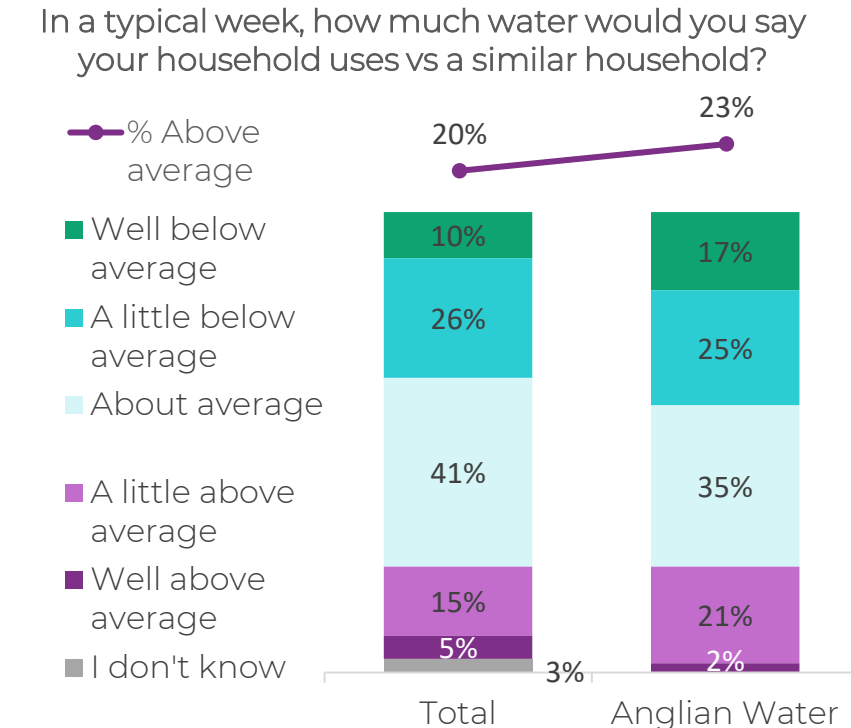
Anglian Water community members want to ensure community member voices lead to real, visible improvements in water services, infrastructure, communication, and environmental responsibility. They expect greater accountability, fairer pricing, better transparency, and a stronger relationship between water companies and the communities they serve.

Active community members
Total Base Size: 755
Anglian Water Base Size: 52

Water Use at Home

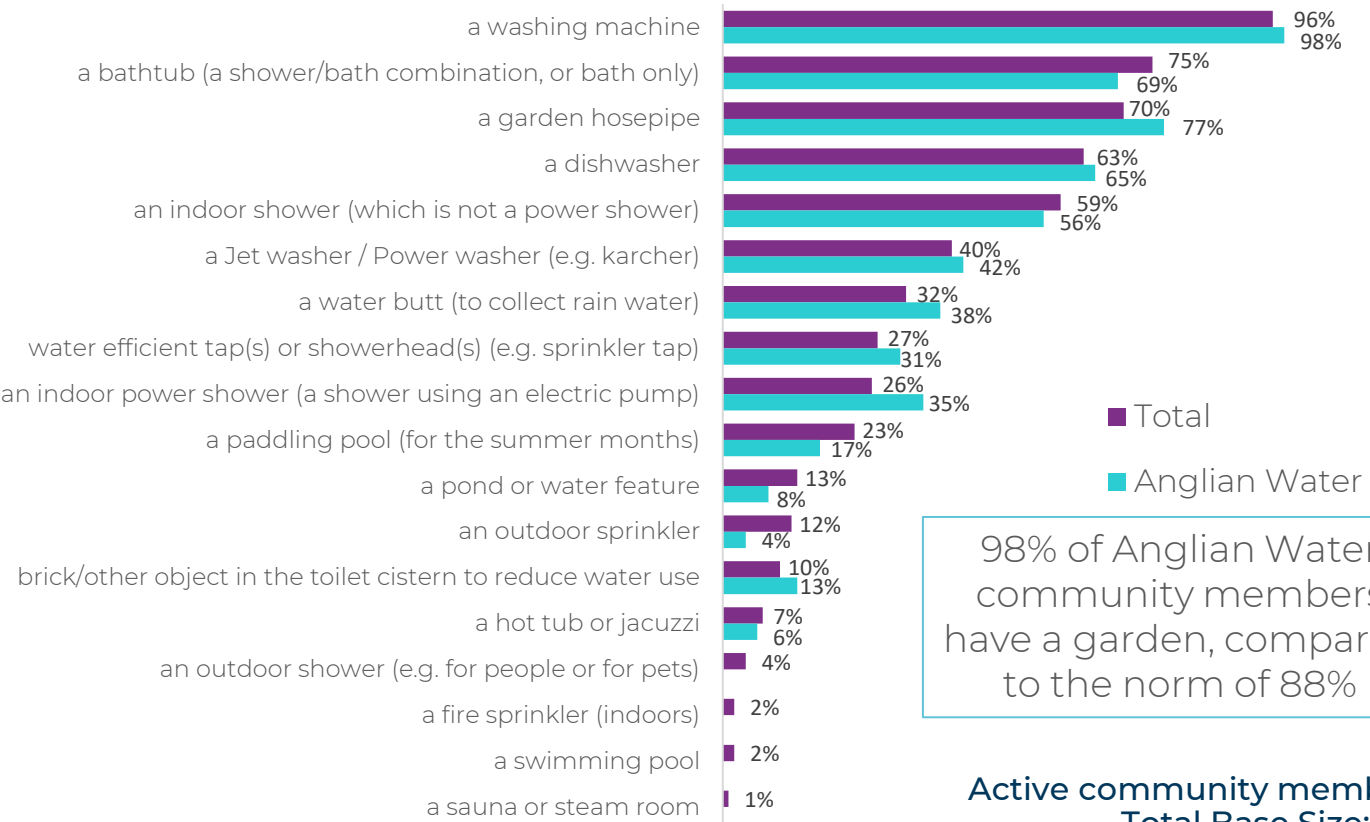


Anglian Water community members are more diverse in their water consumption than the norm for England and Wales. A greater number are saying they use 'above average' but also a greater number saying they use 'below average' amounts.



With a higher number of Anglian Water community members having a garden compared to the norm, a higher number also have a garden hosepipe and a water butt. Fewer have a bath and more have a power shower.

Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



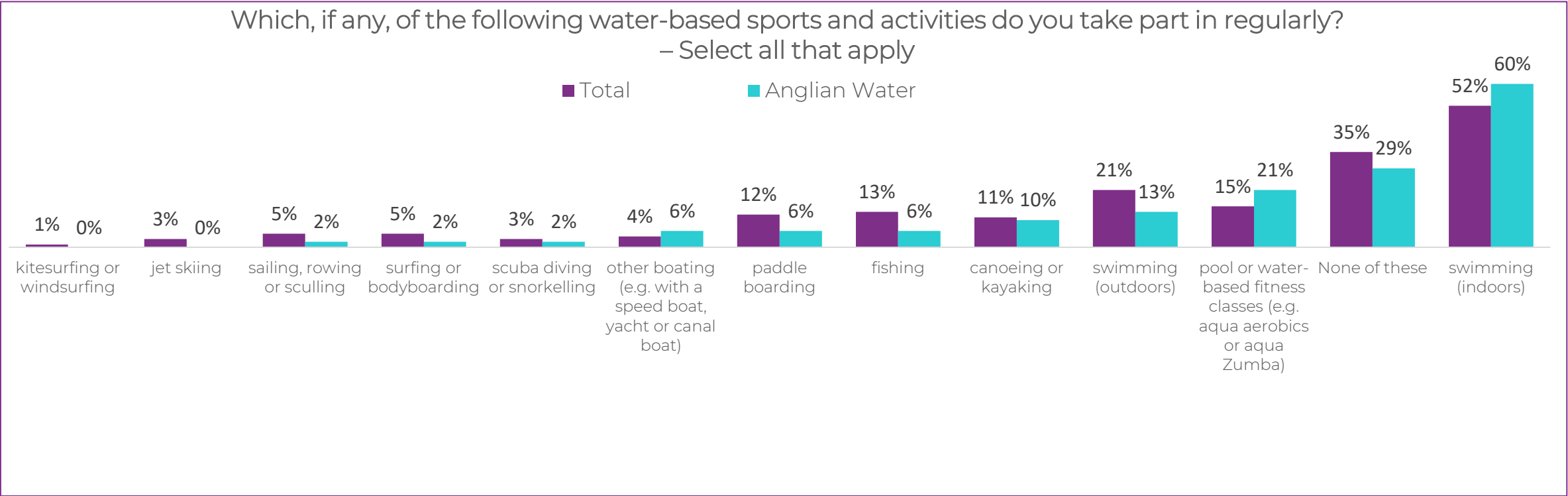
98% of Anglian Water community members have a garden, compared to the norm of 88%

Active community members
Total Base Size: 755
Anglian Water Base Size: 52

Water Locations & Activities



Swimming (indoors) is by far the most common water-based activity in general and especially so for Anglian Water community members.

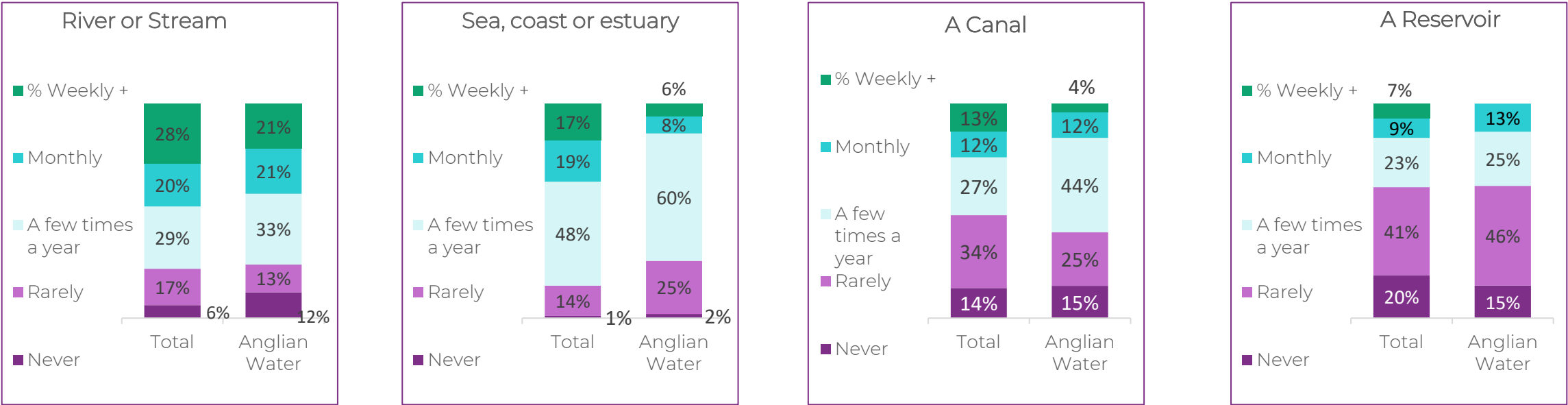


Water Locations & Activities

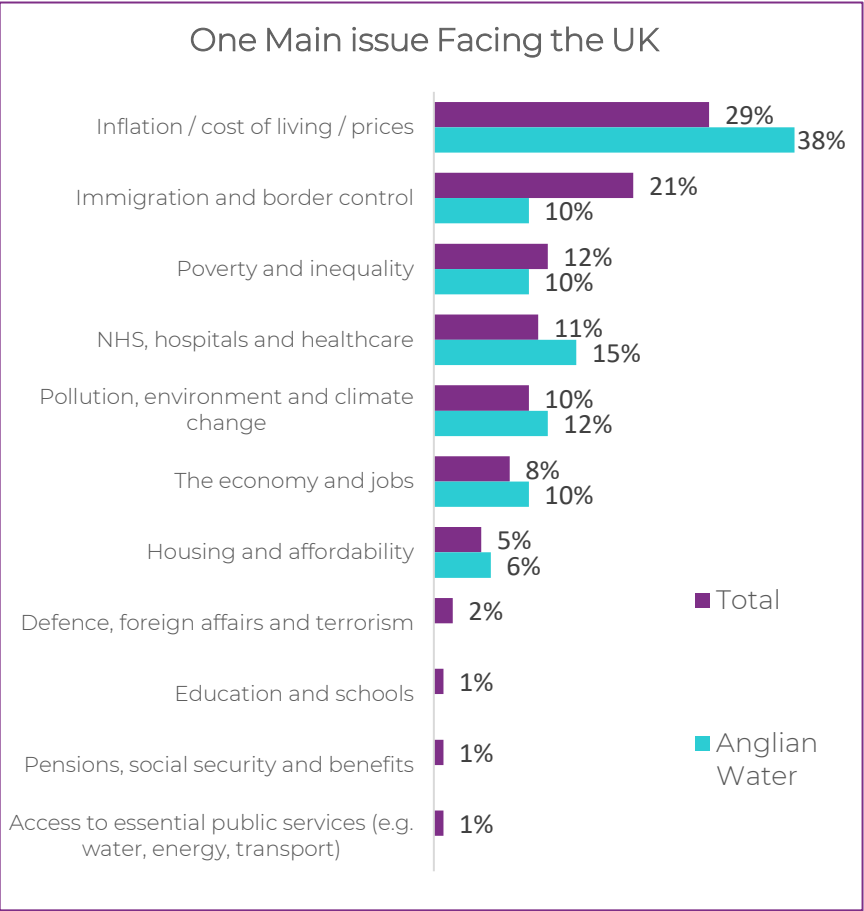
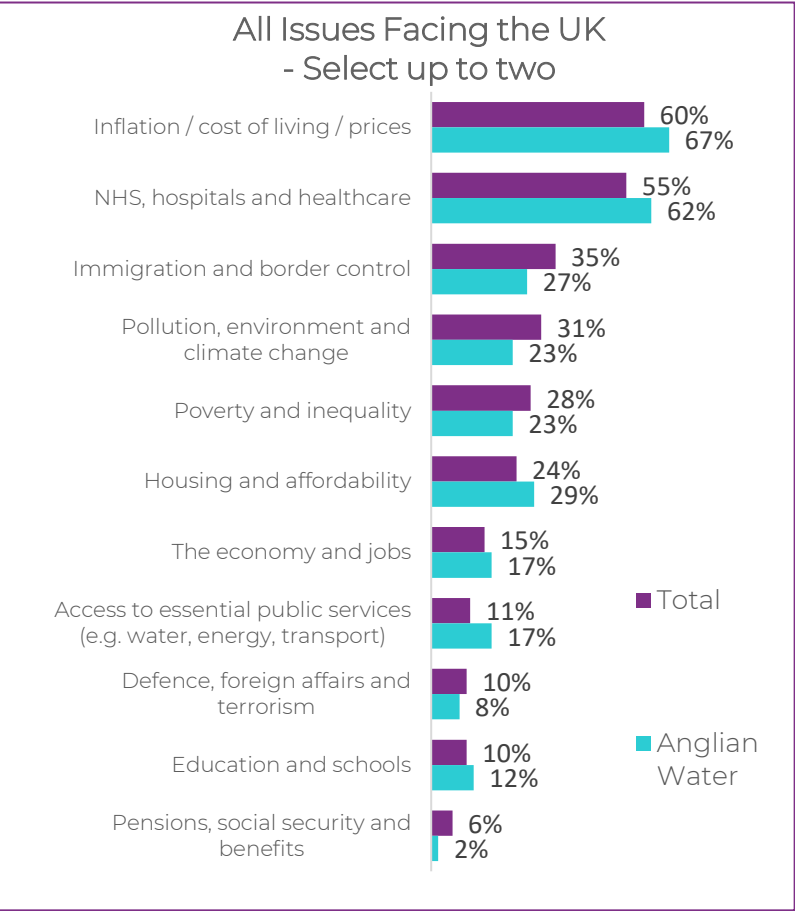


Anglian Water community members are more likely than the norm to visit a river, stream, the sea, coast, estuary, or a canal just a few times a year and to rarely visit a reservoir.

How often, if at all, do you spend time by or on the water at any of these places shown below?



UK Issues



Anglian Water community members have told us their top issue is:

- Inflation / cost of living / prices

This is by a higher number than the norm as the single biggest issue facing the UK today.

They are also more likely to see the NHS, hospitals and healthcare as a bigger issue than immigration and border control (which the norm sees as the second biggest issue).

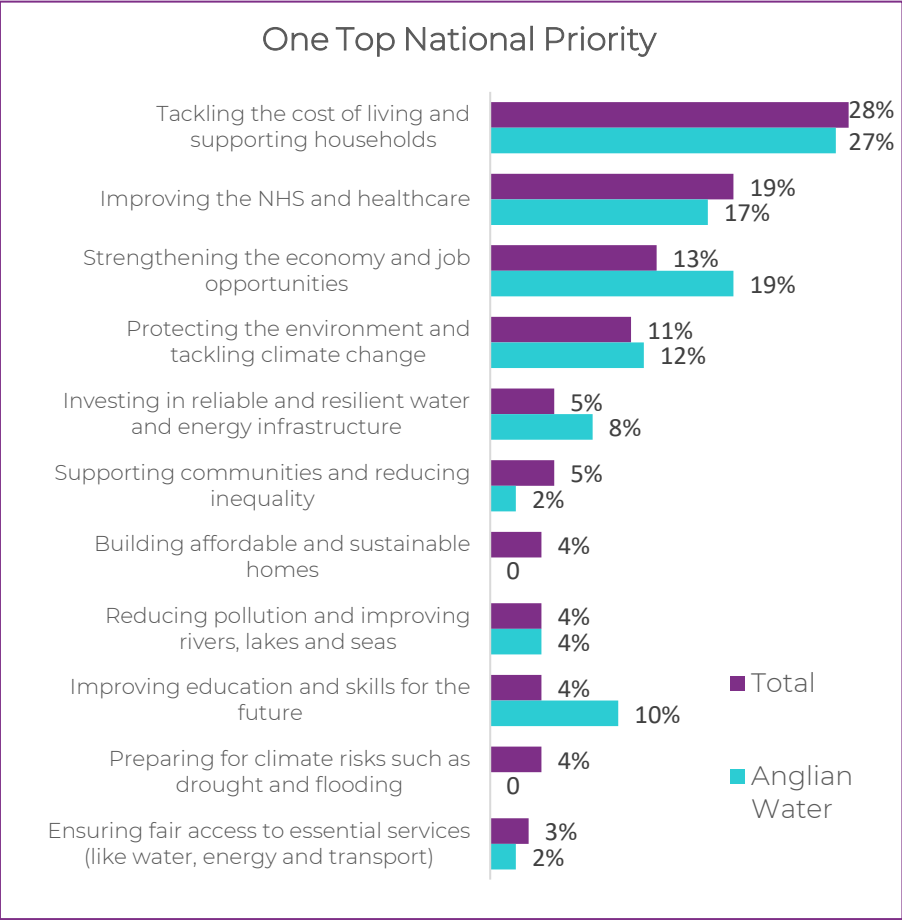
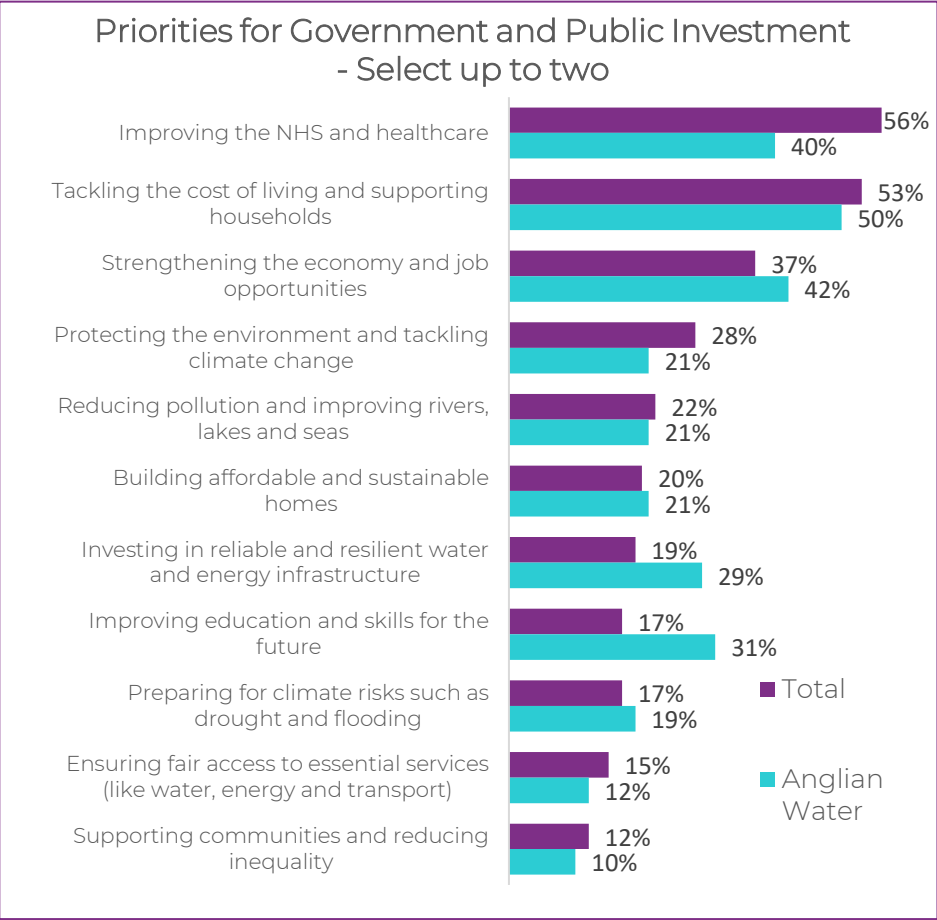
UK Priorities



Within our community, the most commonly mentioned priority is improving the NHS and healthcare, with tackling the cost of living and supporting households the second most commonly mentioned.

Anglian Water community members rank tackling the cost of living as the top priority, followed by strengthening the economy and job opportunities.

Anglian Water community members are also more likely than the norm to see education as a national priority, as well as investing in reliable and resilient water and energy infrastructure.



Environment Concerns

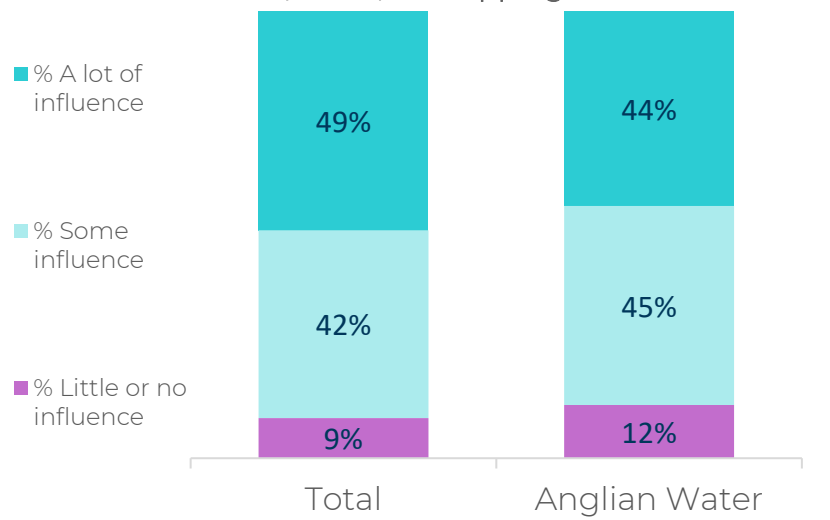
Including Saving Water & Energy



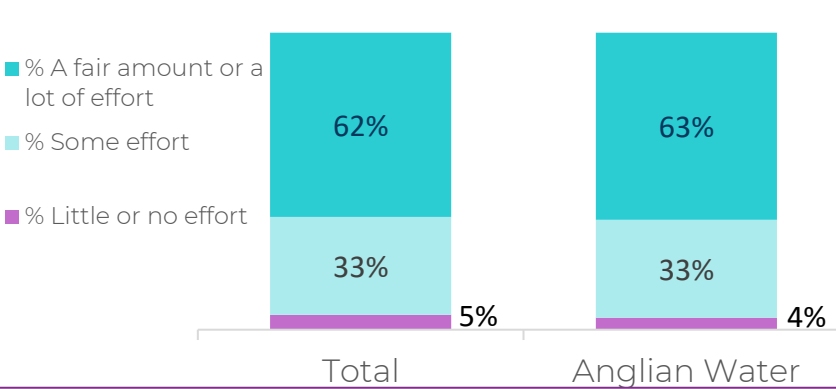
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Anglian Water community members are slightly less likely to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions - for example, around energy use, travel, or shopping?

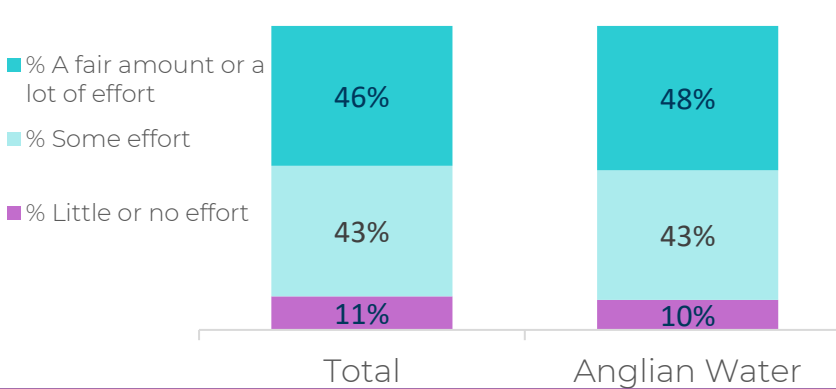


How much effort does your household make at home to save ENERGY?



63% of Anglian Water community members (on a par with the norm), say they make a fair amount or a great deal of effort to save energy.

How much effort does your household make at home to save WATER?

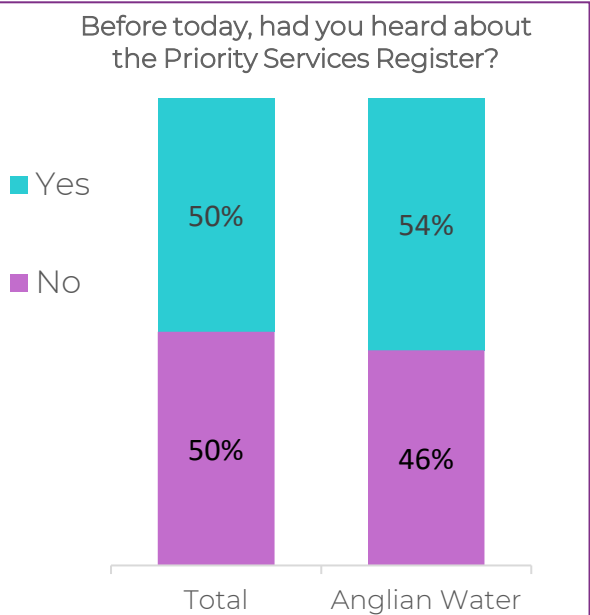


The number of community members saying they make a great deal or a fair amount of effort to save water is lower in general compared to energy – 48% of Anglian Water community members saying they make the effort to save water (again on par with the norm).

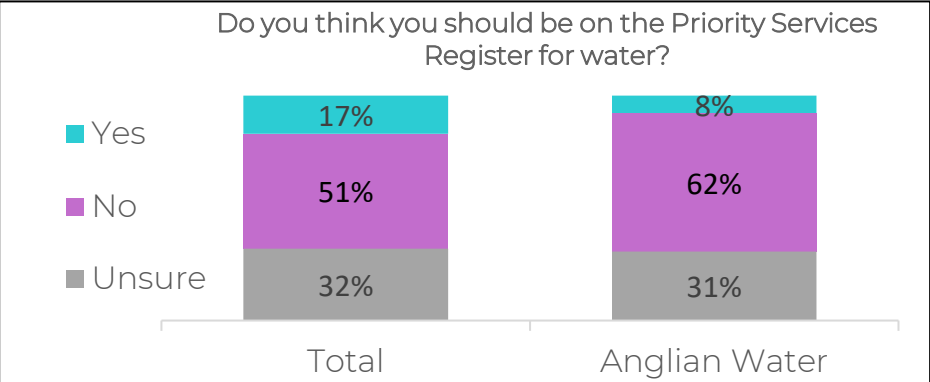
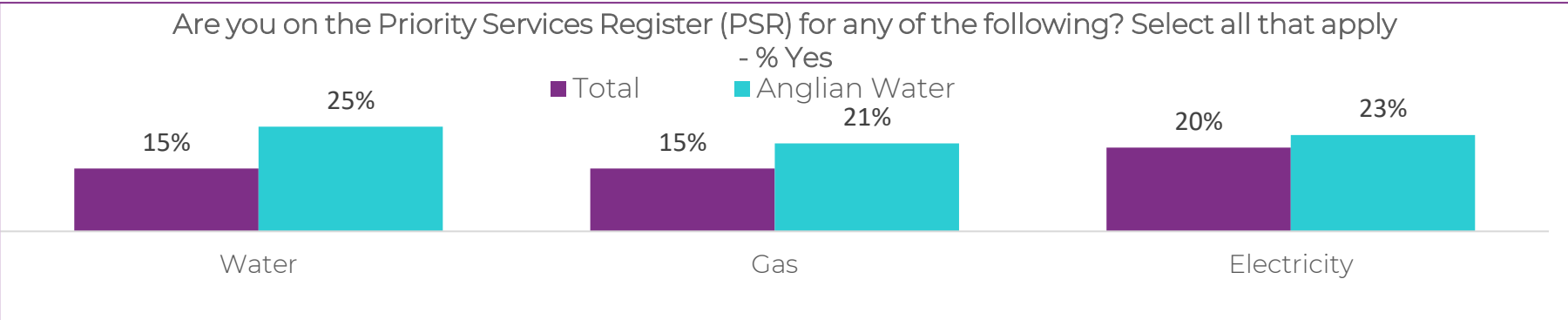
Priority Services Register



Overall, 54% of Anglian Water community members say they have heard of the Priority Services Register.



A higher proportion of Anglian Water community members say they are on the Priority Services Register for water than for gas or electricity and they are more likely to be on the registers compared to the norm.



For those not currently on the Priority Services Register for water, 8% of Anglian Water community members think they should be on it.

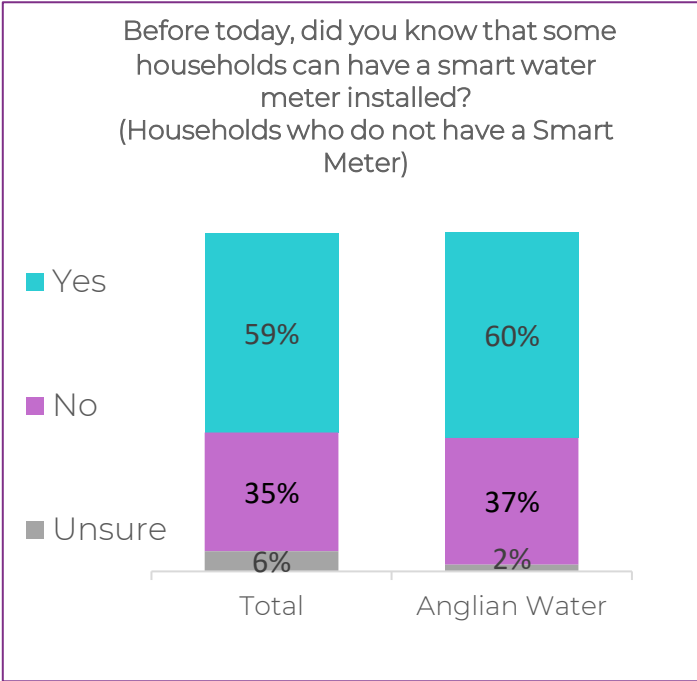
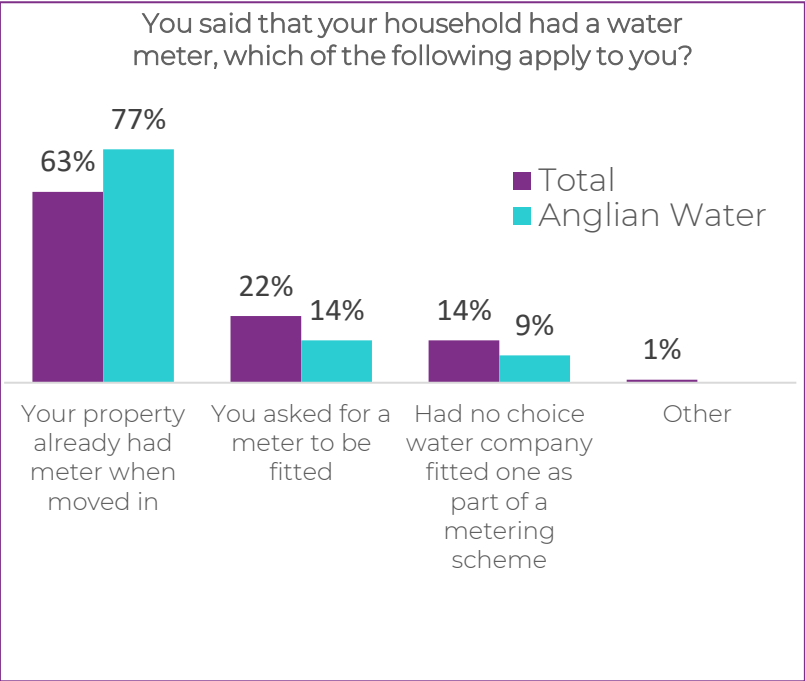
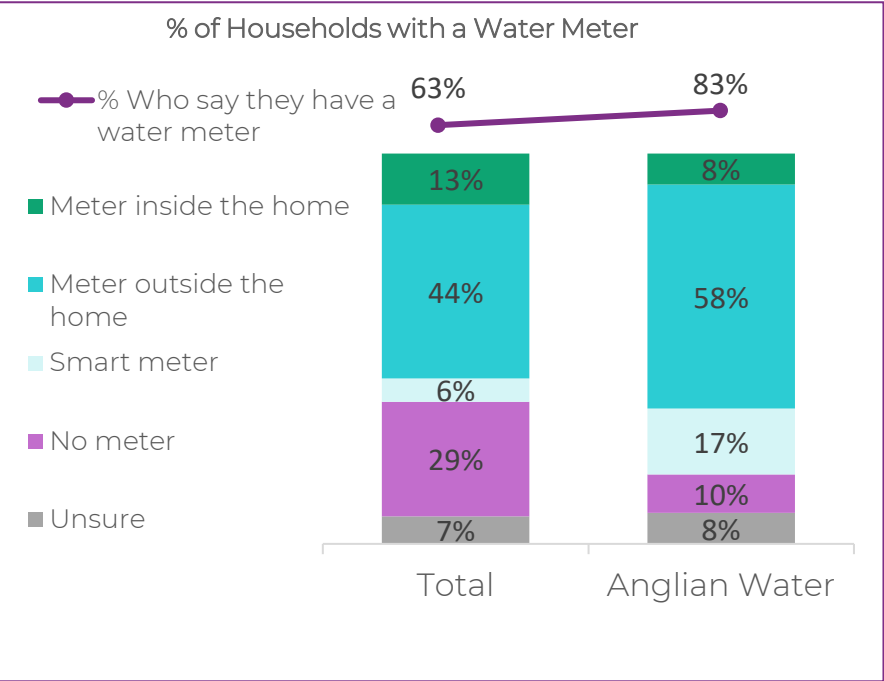
Water Meters



Anglian Water community members are more likely than the norm to have a water meter, driven by a much higher number with a meter outside the home. A slightly higher number of Anglian Water households have a smart meter.

For Anglian Water community members who have a water meter (more than the norm) the property already had a meter installed when they moved in.

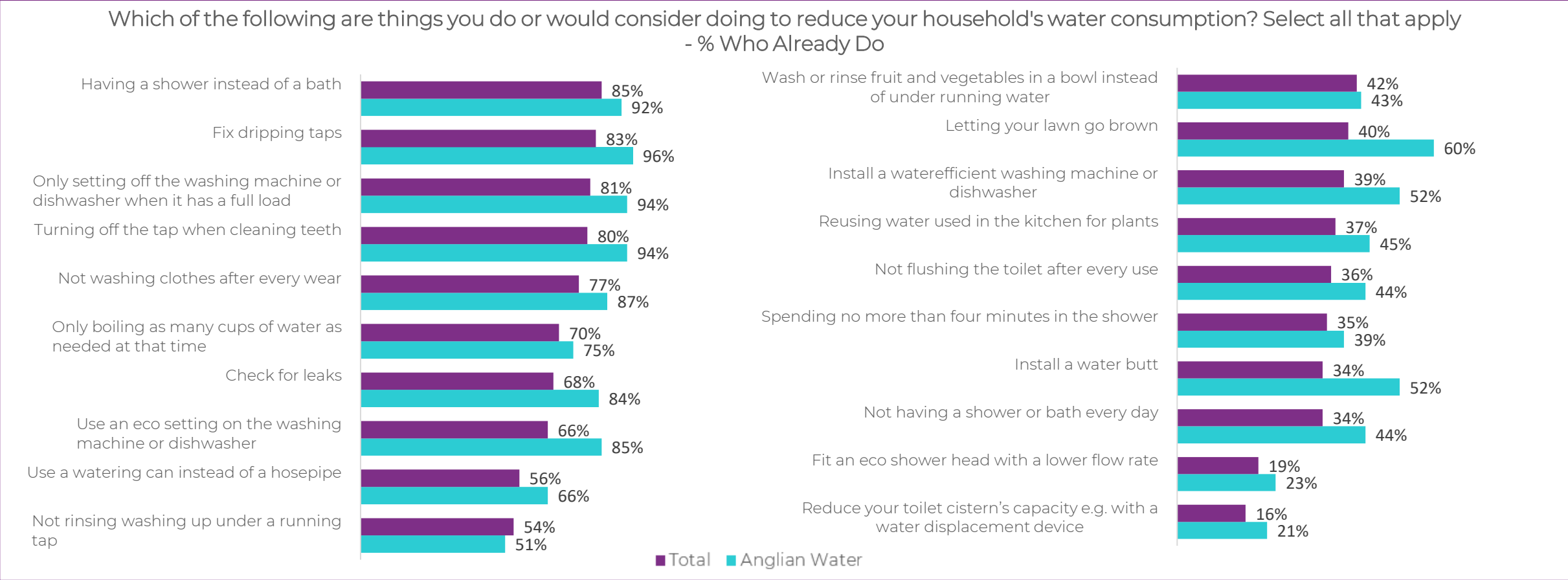
60% of Anglian Water community members (in line with the norm) say they know that households can have a smart water meter installed.



Water-Saving Measures



The majority of Anglian Water community members (and a higher number compared to the norm) say they are already switching to showers instead of baths, fixing dripping taps, only setting off the washing machine and dishwasher with a full load (and using eco settings), not washing clothes after every wear, and checking for leaks.



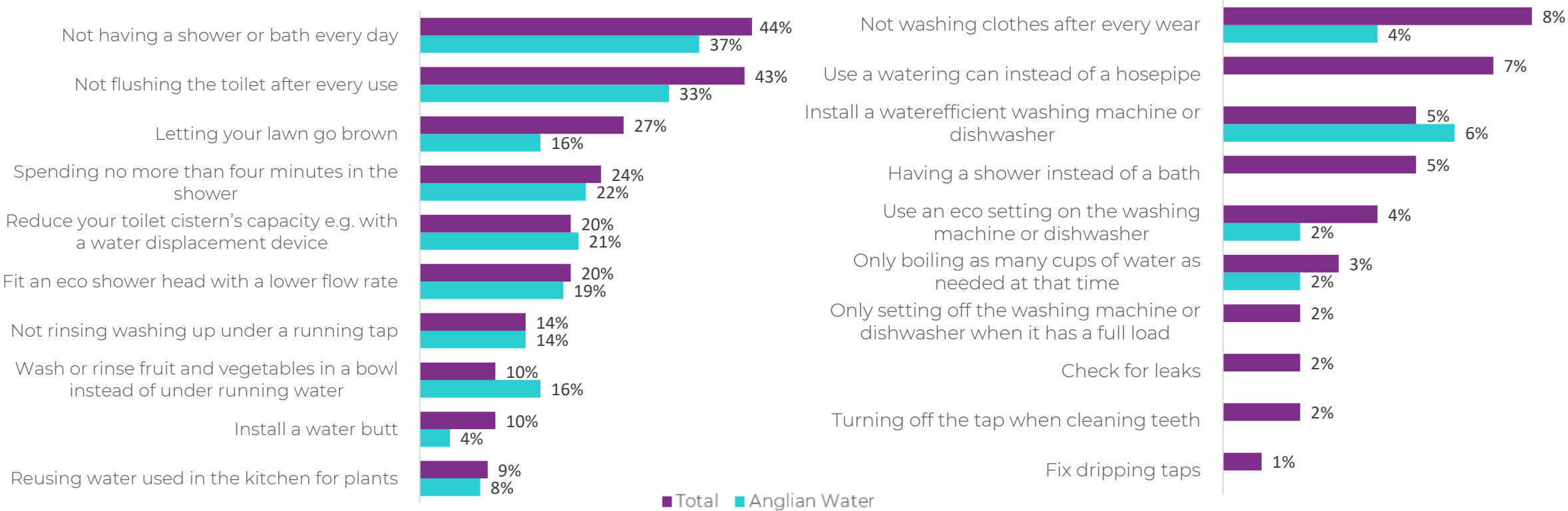
Active community members
Total Base Size: 755
Anglian Water Base Size: 52

Water-Saving Measures



For Anglian Water community members, the water-saving measures generating the greatest resistance are the same as they are for households in general, namely not having a bath/shower every day and not flushing the toilet after every use.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who Would NOT Consider

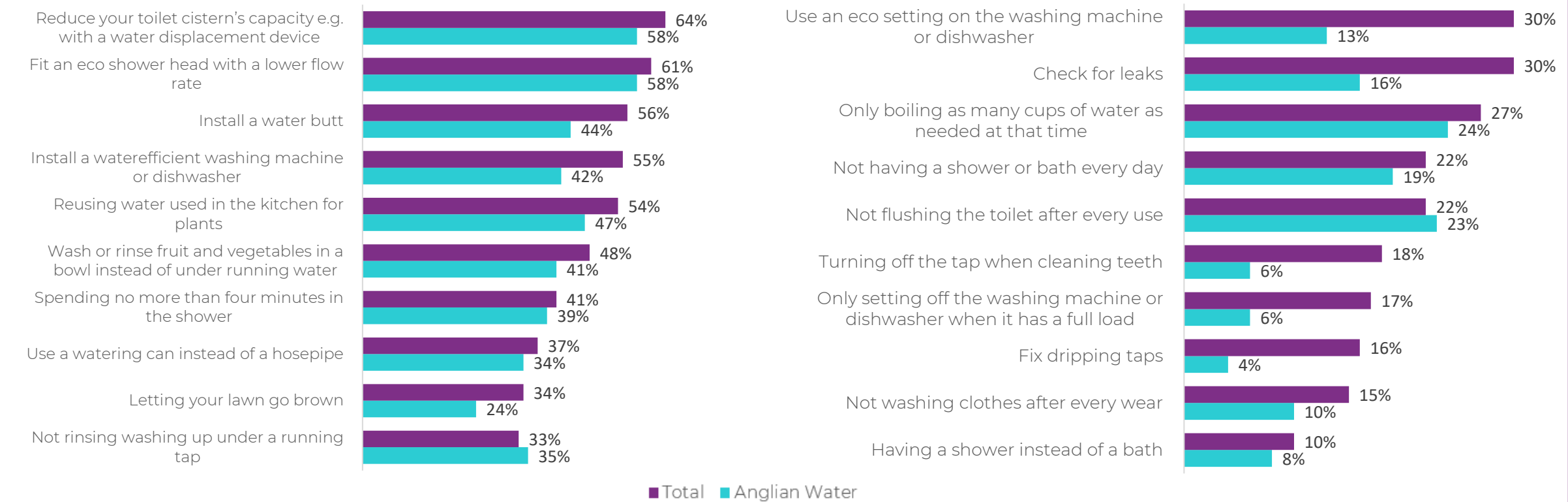


Water-Saving Measures



For Anglian Water community members, the highest levels of openness are to reducing the toilet cistern's capacity, fitting an eco shower, and reusing water used in the kitchen for plants.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who WOULD Consider



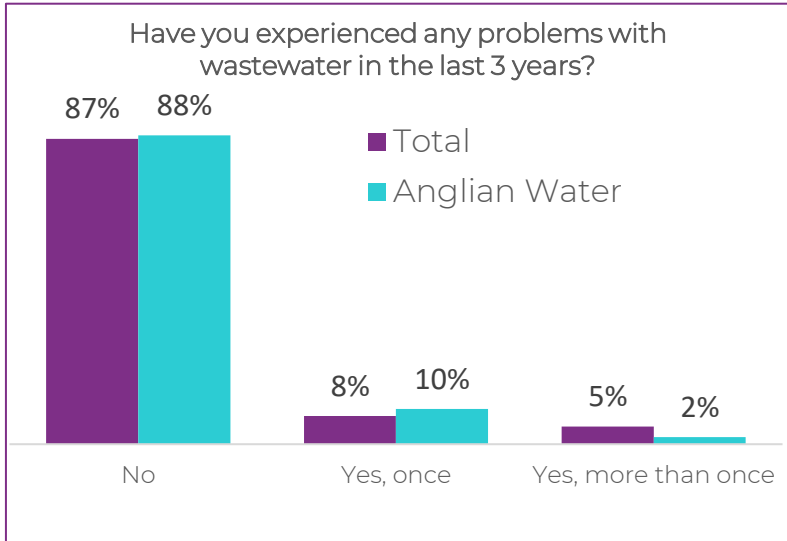
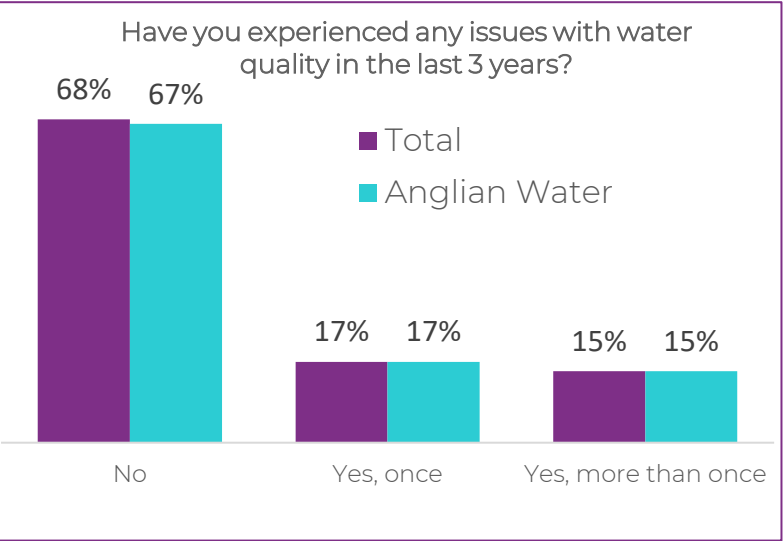
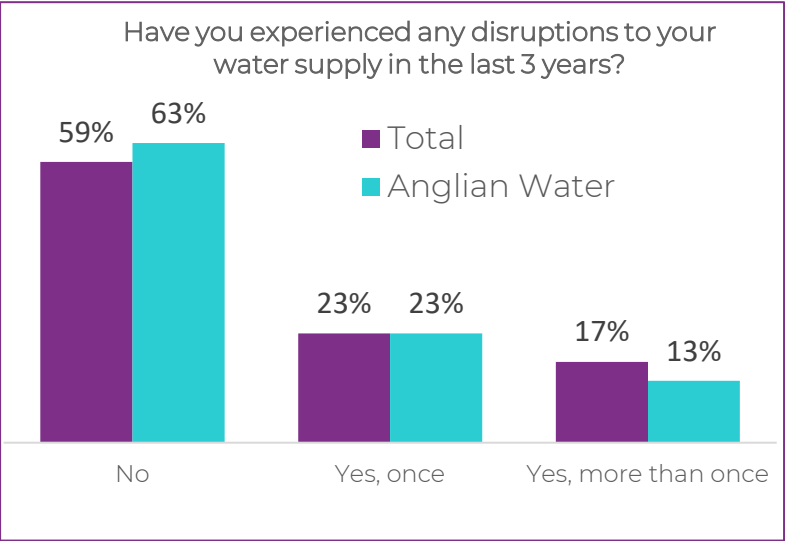
Disruptions & Issues



63% of Anglian Water community members say they have not experienced supply disruptions in the last 3 years (slightly higher than the norm). 23% have had one disruption and 13% have had a disruption more than once (slightly below the norm).

67% of Anglian Water community members say they have had no issues with water quality in the last 3 years, on par with the norm. 17% have had one issue and 15% more than one issue.

88% of Anglian Water community members say they have had no problems in the last 3 years with waste water (in line with the norm). 10% have once had an issue and 2% have had an issue more than once.

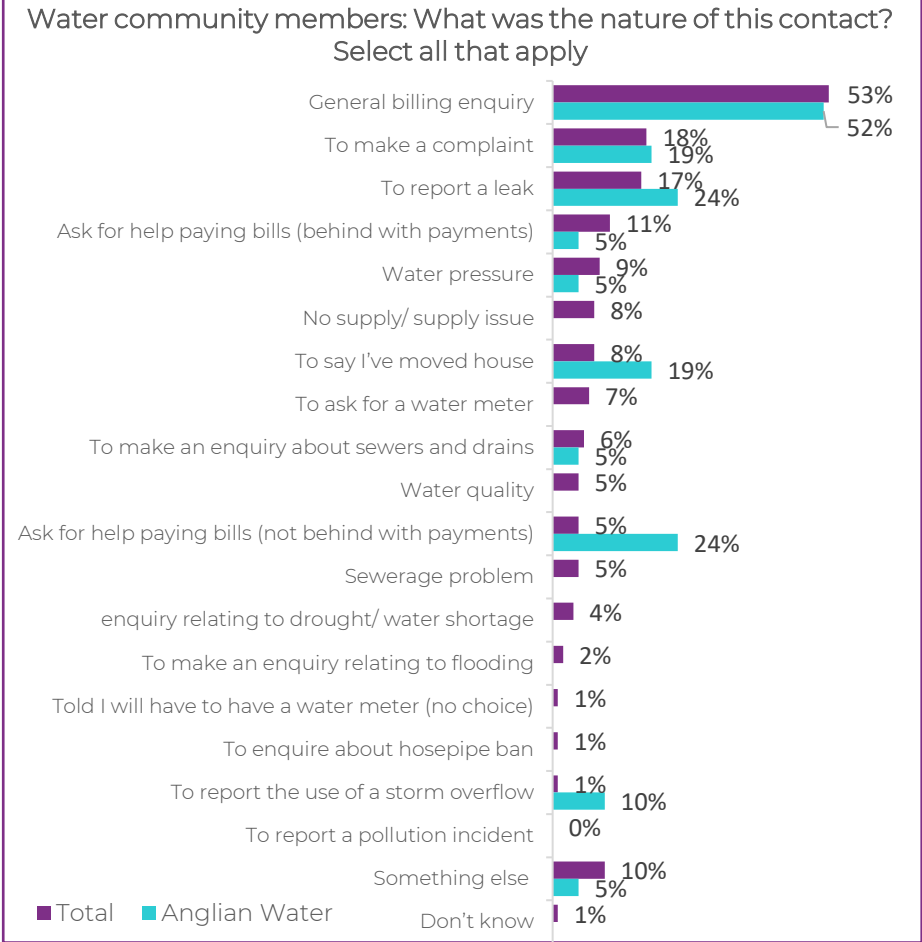
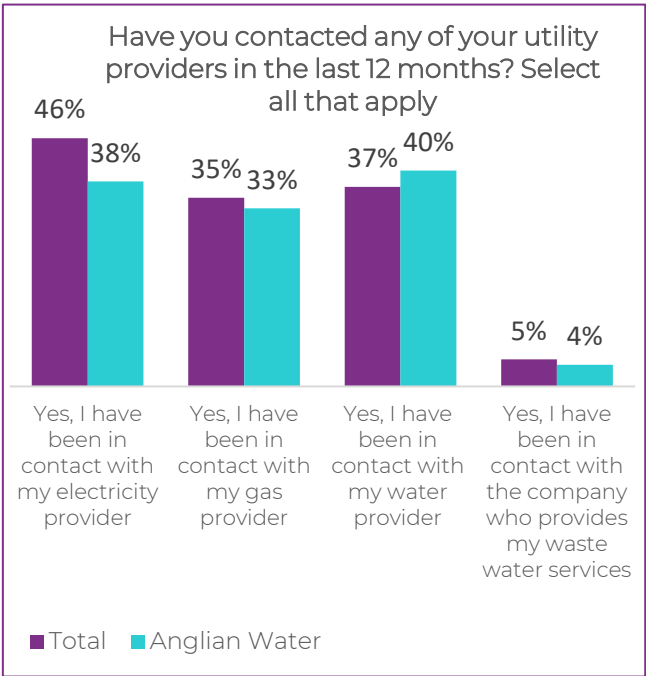


Contact with utility providers

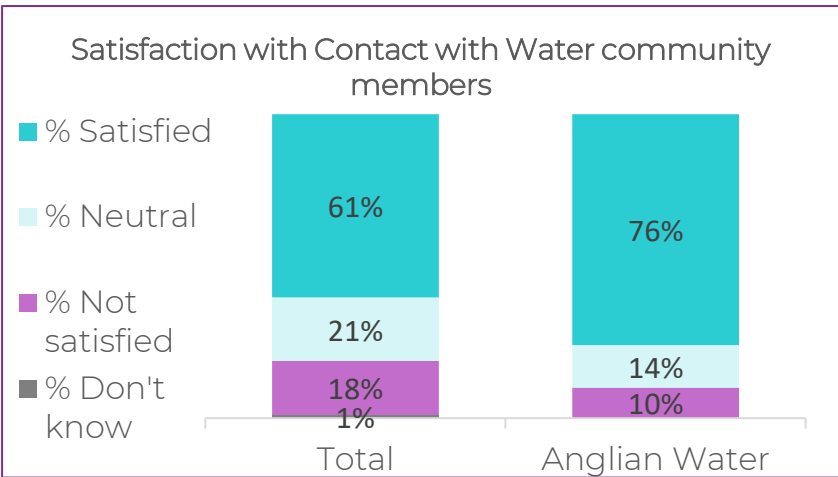


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40% of community members have been in contact with Anglian Water in the last 12 months (higher than the number who have been in contact with other utility providers).



Billing enquiries is the main reason for contacting Anglian Water. Reporting a leak was selected by 24% of Anglian Water community members who made contact, higher than the norm of 17%. Asking about help paying bills (behind with payments) was selected by 24%, this is higher than the norm. 76% of Anglian Water community members who made contact were satisfied with that contact (higher than the norm).



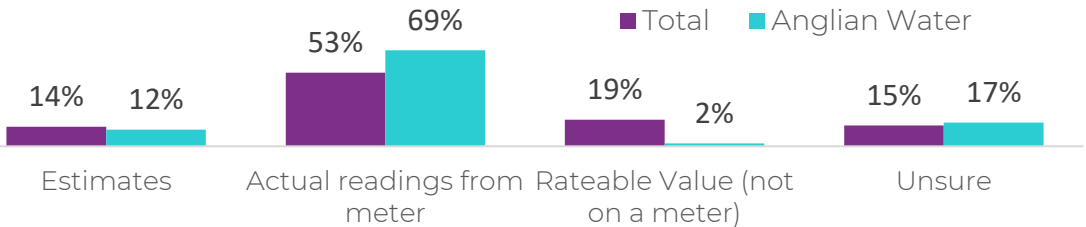
Billing



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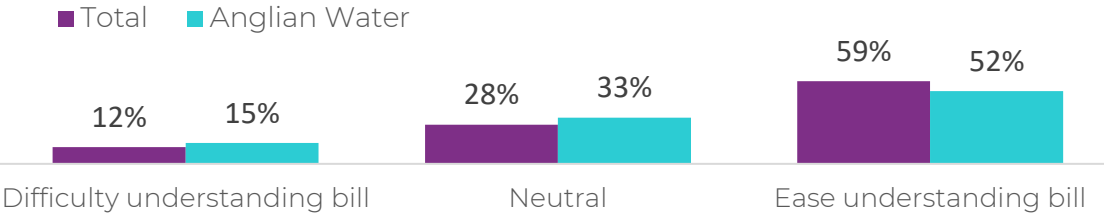
Anglian Water community members are more likely than the norm to have their water bills based on actual meter readings and much less likely to have rateable value as the base.

Are the bills you receive from your water company estimates or from actual readings?



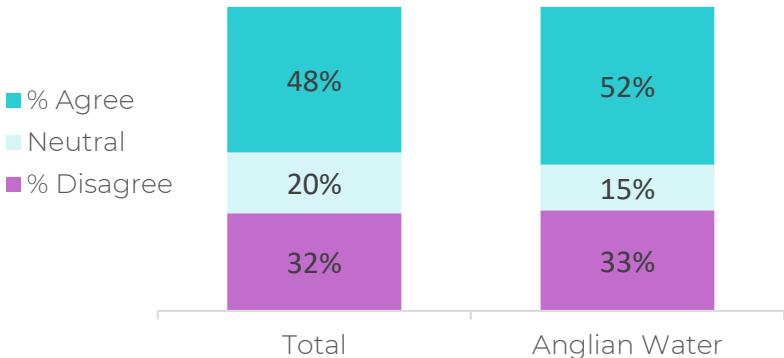
52% of Anglian Water community members say they find it easy to understand their water bills, slightly below the norm.

How easy or difficult to understand are the water bills you receive?



How much do you agree or disagree with the following statements?

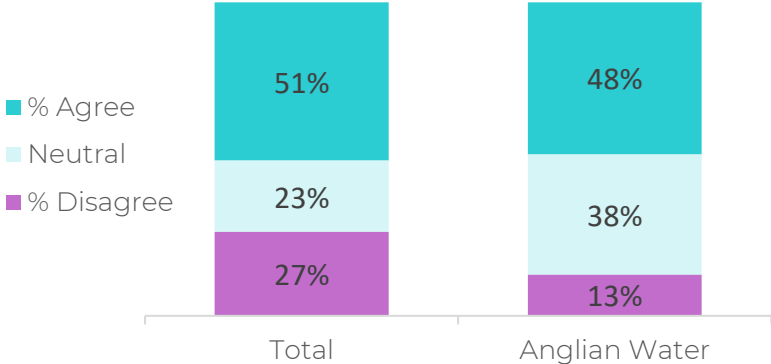
I fully understand how my water bill is calculated



52% of Anglian Water community members feel they understand how their water bill is calculated, marginally above the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



Anglian Water community members are more likely than the norm to feel neutral about the affordability of their water bills and less likely to disagree that they are affordable.



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Water Voice

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Northumbrian Water and Essex
& Suffolk Water

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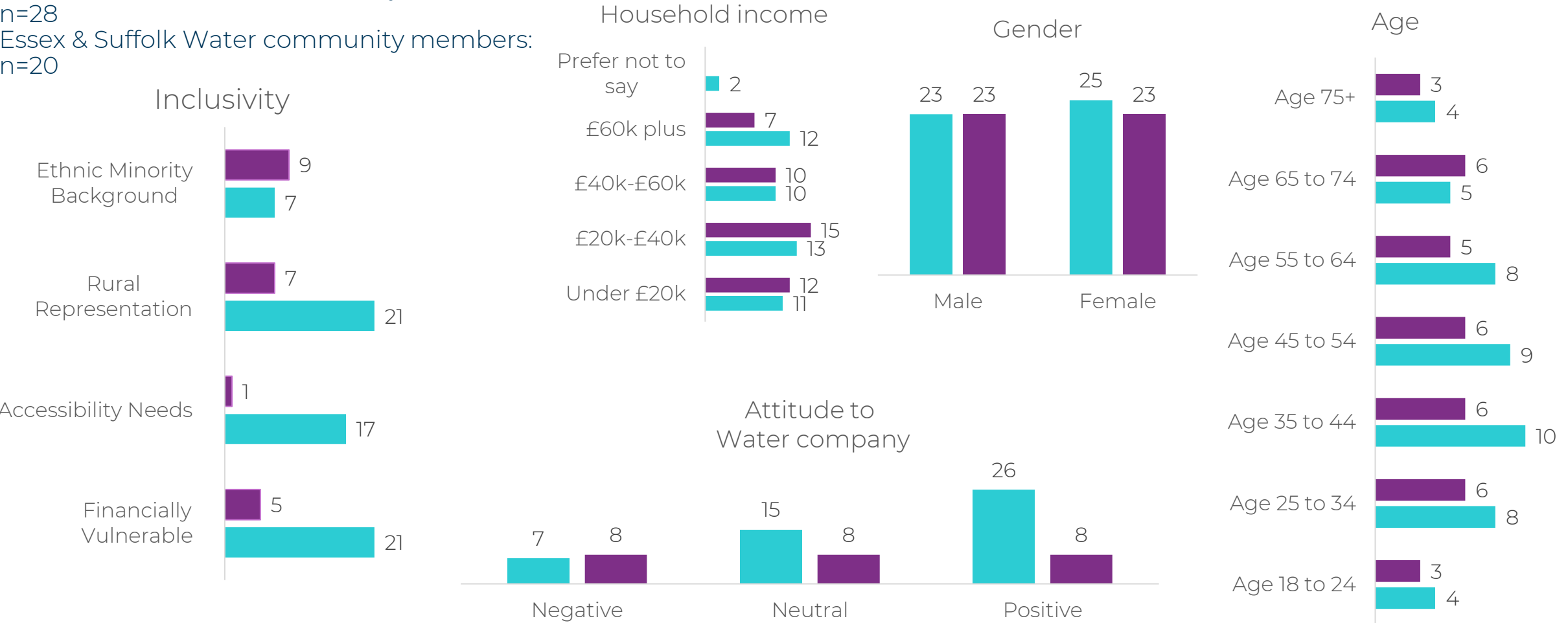
Northumbrian Water and Essex & Suffolk Water

Community population



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Northumbrian Water community members:
n=28
Essex & Suffolk Water community members:
n=20



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

Northumbrian Water and Essex & Suffolk Water

What do community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Being heard & influencing change:** ensure that real customer experiences, worries and ideas influence decisions.
- **Better service, infrastructure & reliability:** clear expectations for improved reliability, communication, and water quality.
- **Greater accountability, communication and education:** desire for companies to listen, act, and show transparency.
- **Environmental protection & water quality:** protect river quality and water sources, less sewage discharge and more sustainable water management.
- **Building a collaborative relationship:** bridge the gap between water company and community members, helping to shape better services and policies.



What Northumbrian Water and Essex & Suffolk Water community members have said...

"I hope it helps improve how water services are managed, making them fairer, more reliable, and more focused on what people really need."

Female, 30, Lives with child/children, Northumbrian Water

"I hope that they take on real opinions and experiences of real people and make improvements to their practices based on our feedback."

Female, 28, Lives alone, Northumbrian Water

"Hopefully address and gain a better understanding of the company I am with. I want to help to address any issues that Essex and Suffolk water may have and work together to have a better service."

Female, 71, Lives alone, Essex & Suffolk Water



Northumbrian Water and Essex & Suffolk Water community members want to ensure community members' voices meaningfully influence decisions; improving service quality, fairness, transparency, and environmental responsibility. They hope for stronger communication, better education, and a collaborative relationship where insights lead to real, sustained improvements.

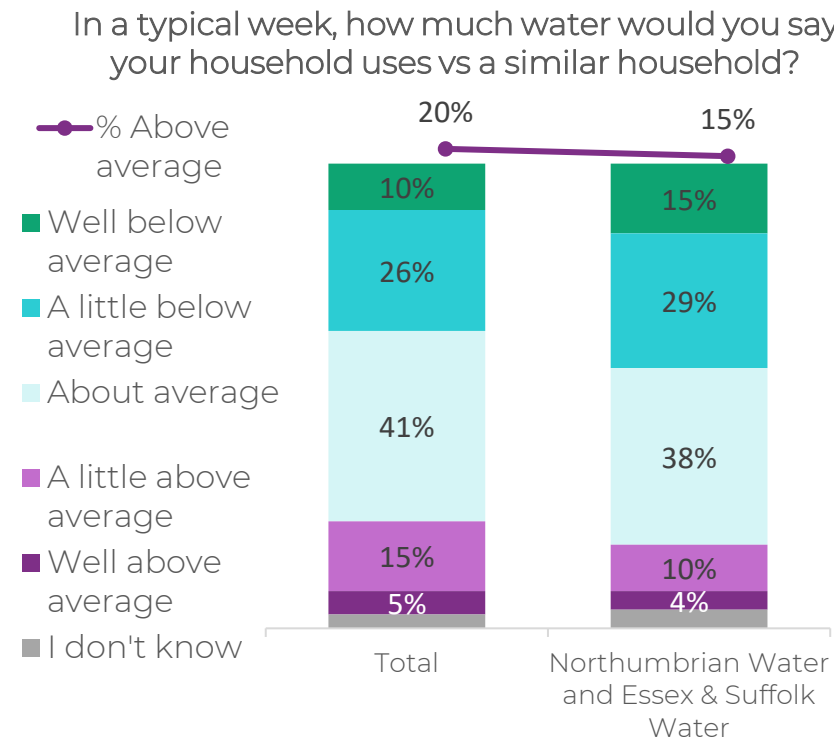
Active community members
Total Base Size: 755

Northumbrian Water and Essex & Suffolk Water Base Size: 48

Water Use at Home

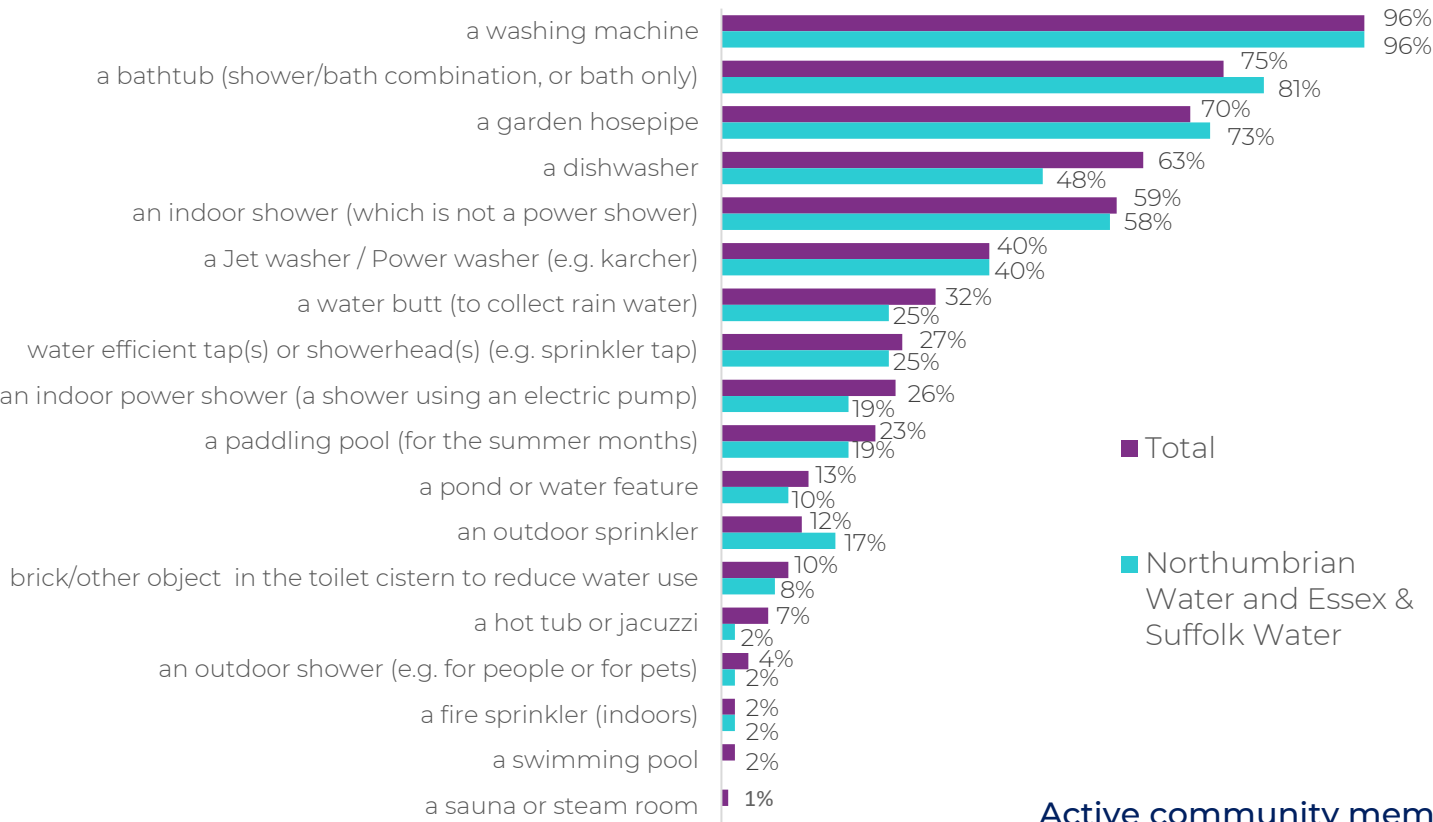


Northumbrian Water and Essex & Suffolk water community members say they consume less water than the norm with a greater number saying they use ‘below average’.



Compared to the norm, a higher number of Northumbrian Water and Essex & Suffolk Water community members have a bathtub, while fewer have an indoor shower. Fewer than the norm have a dishwasher.

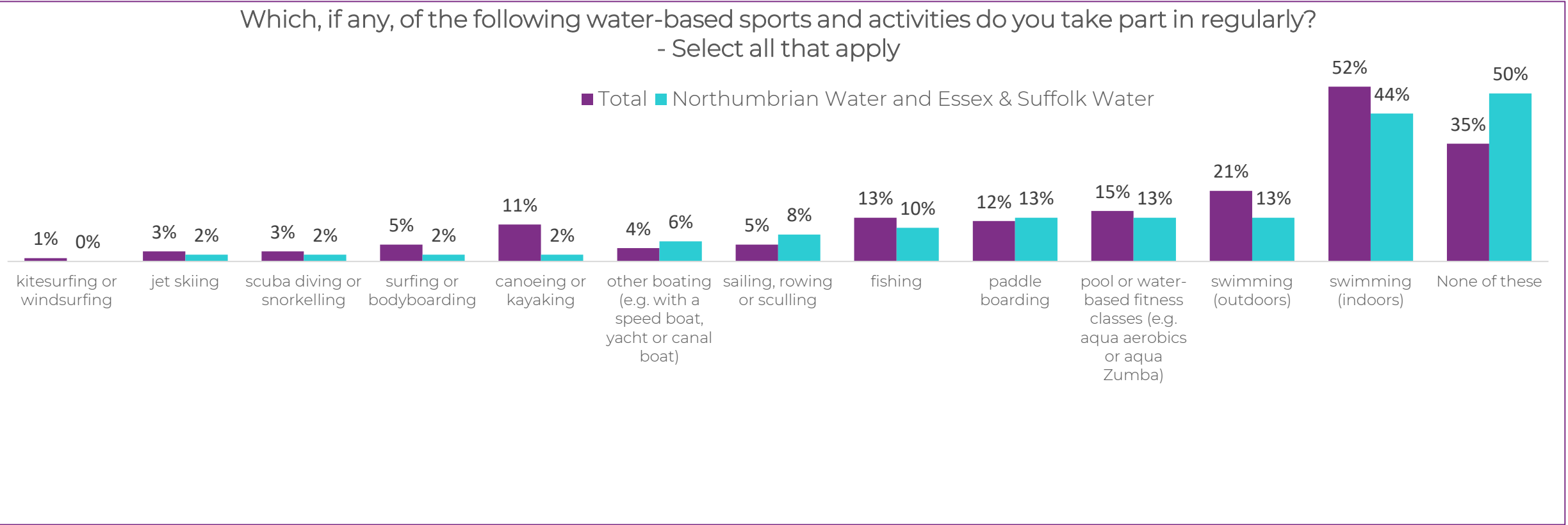
Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Water Locations & Activities



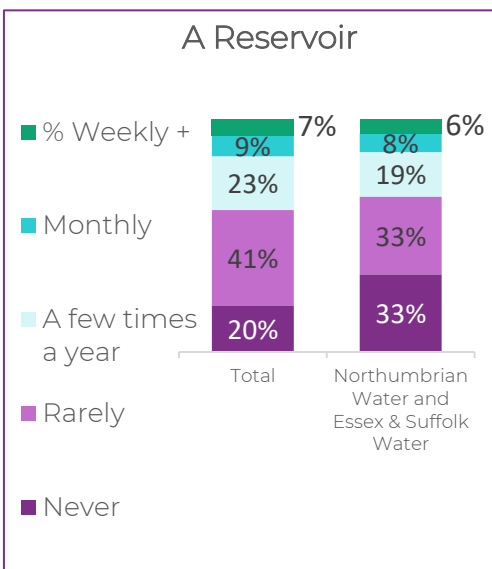
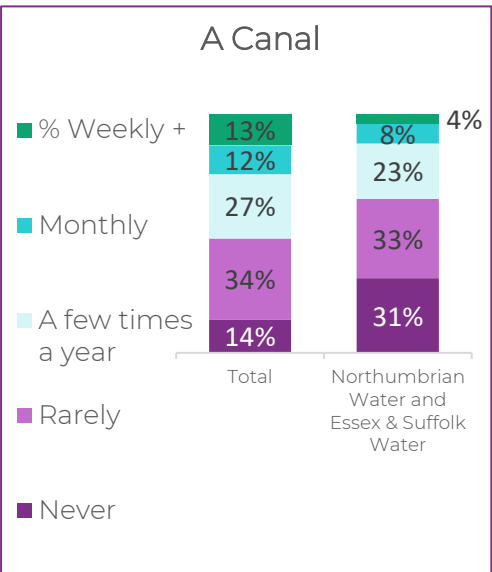
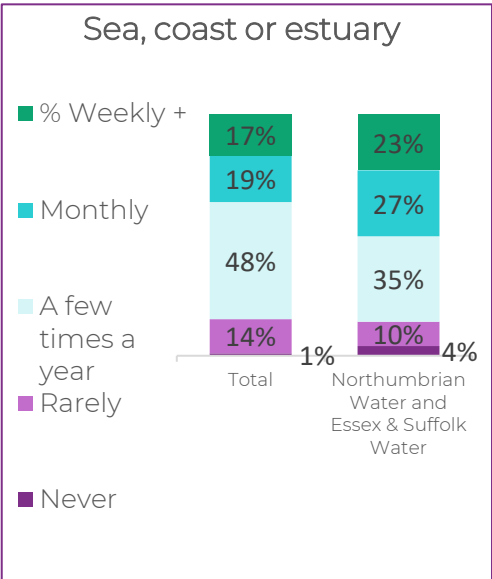
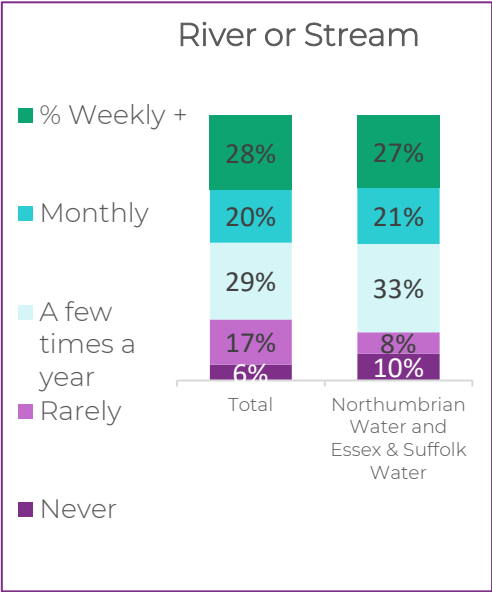
The majority of Northumbrian Water and Essex & Suffolk Water community members do not practice any of the water-based sports and activities presented. Among these activities, swimming (indoors) is by far the most common water-based activity.



Water Locations & Activities

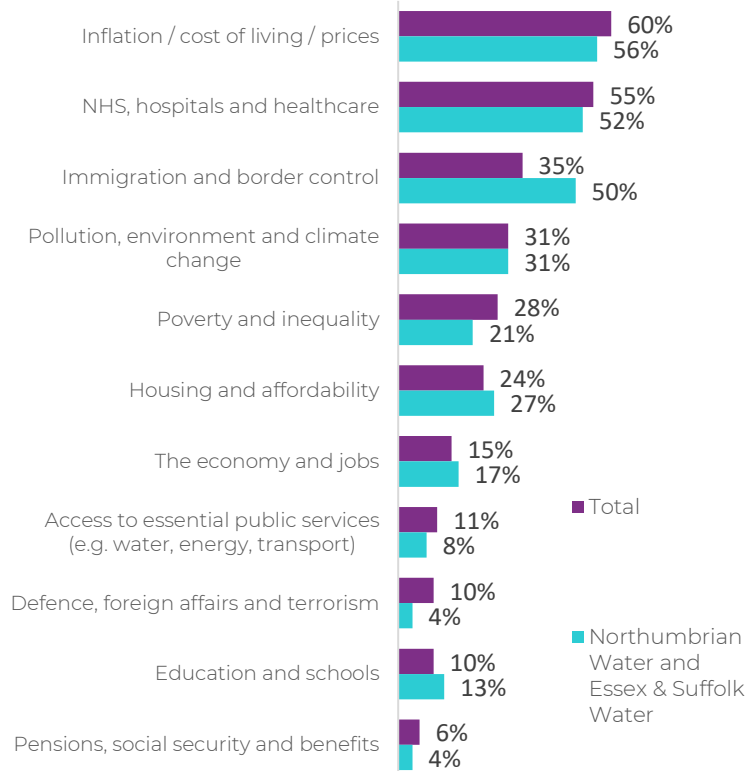
Northumbrian Water and Essex & Suffolk Water community members are more likely than the norm to never visit a reservoir or a canal, but they are more likely to visit the sea, coast or estuary weekly.

How often, if at all, do you spend time by or on the water at any of these places shown below?

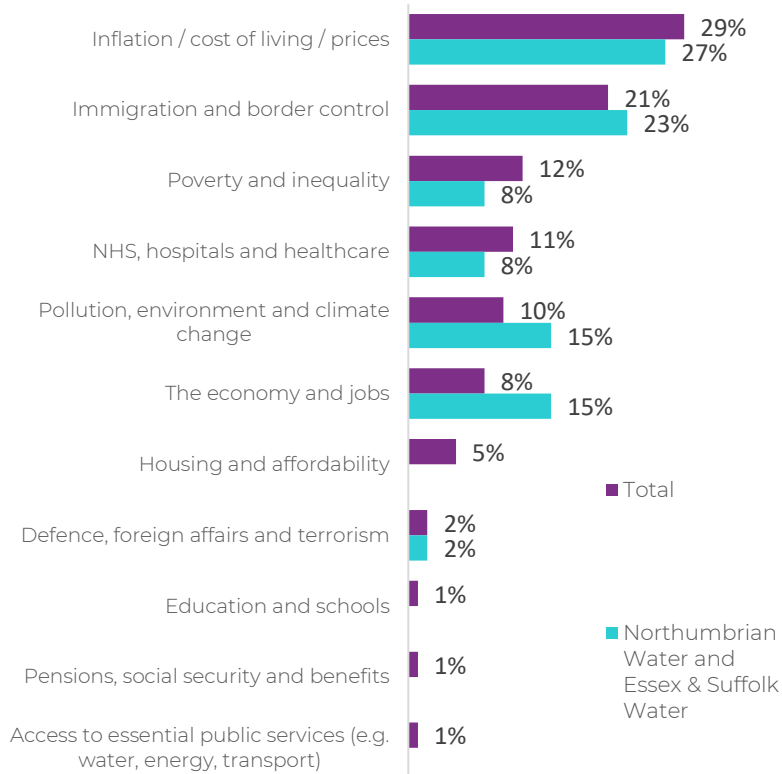


UK Issues

All Issues Facing the UK - Select up to two



One Main Issue Facing the UK



Northumbrian Water and Essex & Suffolk Water community members have told us their top issue is:

- Inflation / cost of living / prices

However, this is by a marginally lower number than the norm.

Pollution, environment and climate change, and the economy and jobs rank as joint third single biggest issues facing the UK. This is above the norm (where they rank fifth and sixth respectively).

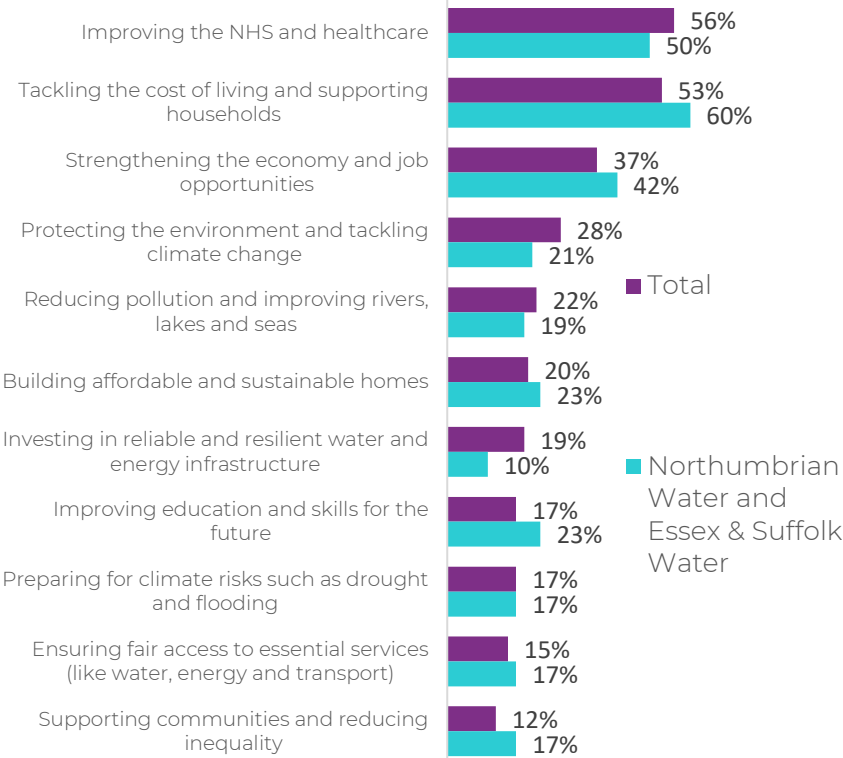
UK Priorities



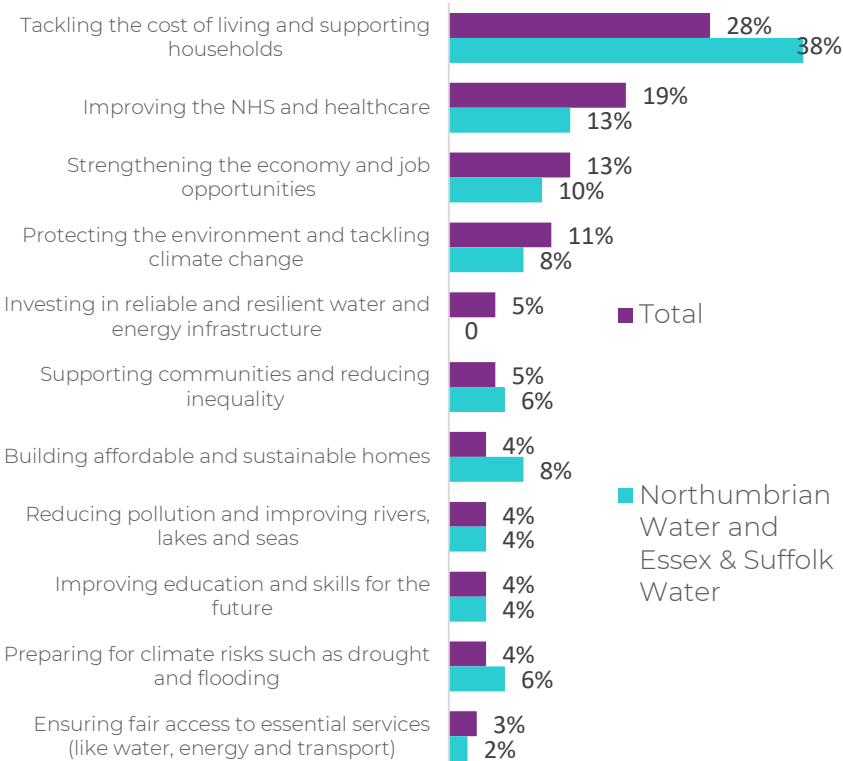
Northumbrian Water and Essex & Suffolk Water community members rank tackling the cost of living and supporting households as the top priority. This is by a higher number than the norm. The second top priority is improving the NHS and healthcare.

Northumbrian Water and Essex & Suffolk Water community members are also more likely than the norm to see building affordable and sustainable homes as a top priority.

Priorities for Government and Public Investment
- Select up to two



ONE Top National Priority



Environment Concerns

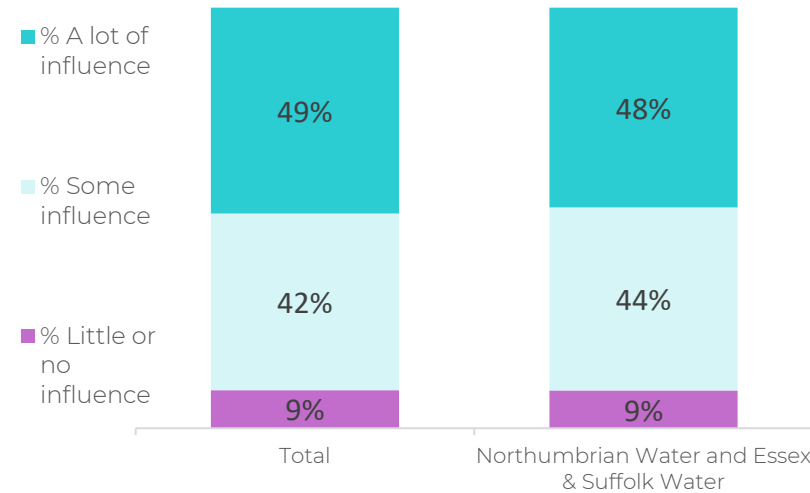
Including Saving Water & Energy



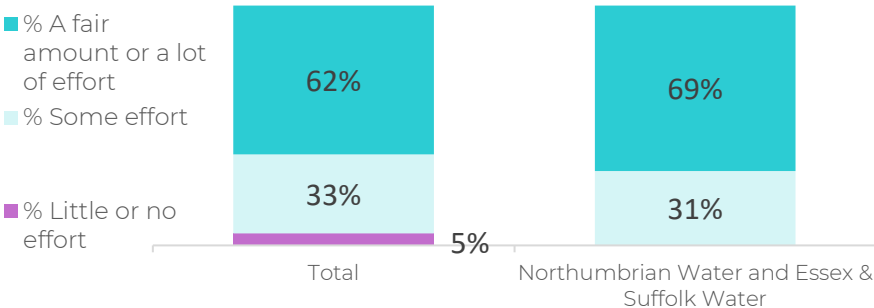
The voice for water consumers
Llais defnyddwyr dŵr

Northumbrian Water and Essex & Suffolk Water community members are slightly less likely to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

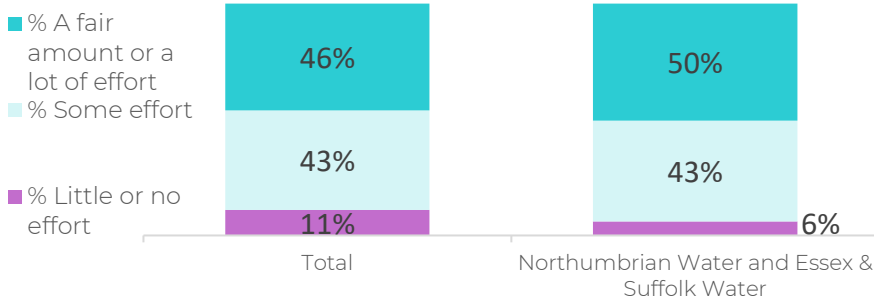


How much effort does your household make at home to save ENERGY?



69% of Northumbrian Water and Essex & Suffolk Water community members say they make a fair amount or a lot of effort to save energy. This is higher than the norm. 0% stated they make 'little or no effort'.

How much effort does your household make at home to save WATER?

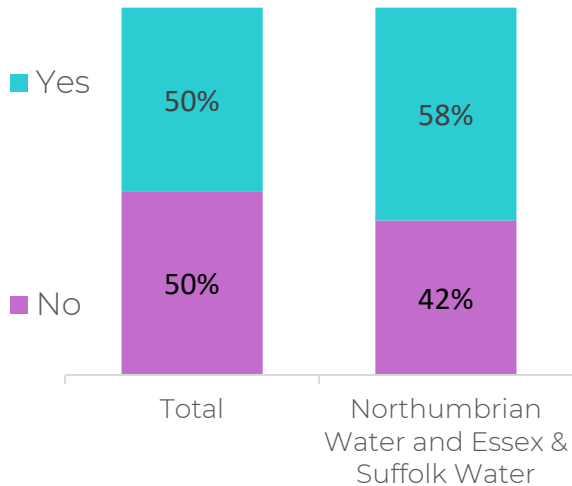


Northumbrian Water and Essex & Suffolk Water community members are slightly more likely than the norm to say they make a fair amount or a lot of effort to save water.

Priority Services Register

Overall, 58% of Northumbrian Water and Essex & Suffolk Water community members say they have heard of the Priority Services Register.

Before today, had you heard about the Priority Services Register?

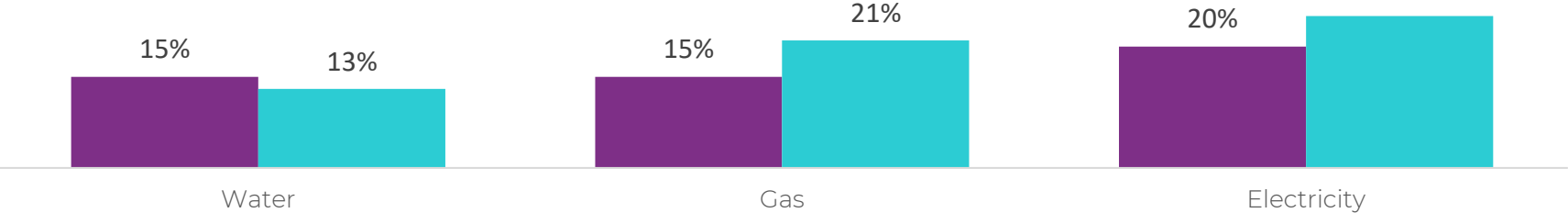


A higher proportion of Northumbrian Water and Essex & Suffolk Water community members say they are on the Priority Services Register for electricity than for gas or water. They are less likely to be on the register for water than the norm.

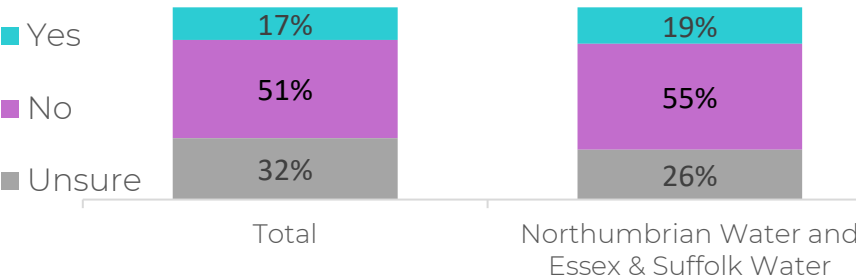
Are you on the Priority Services Register (PSR) for any of the following? Select all that apply

- % Yes

■ Total ■ Northumbrian Water and Essex & Suffolk Water



Do you think you should be on the Priority Services Register for water?



For those not currently on the Priority Services Register for water, 19% of Northumbrian Water and Essex & Suffolk Water community members think they should be on it.

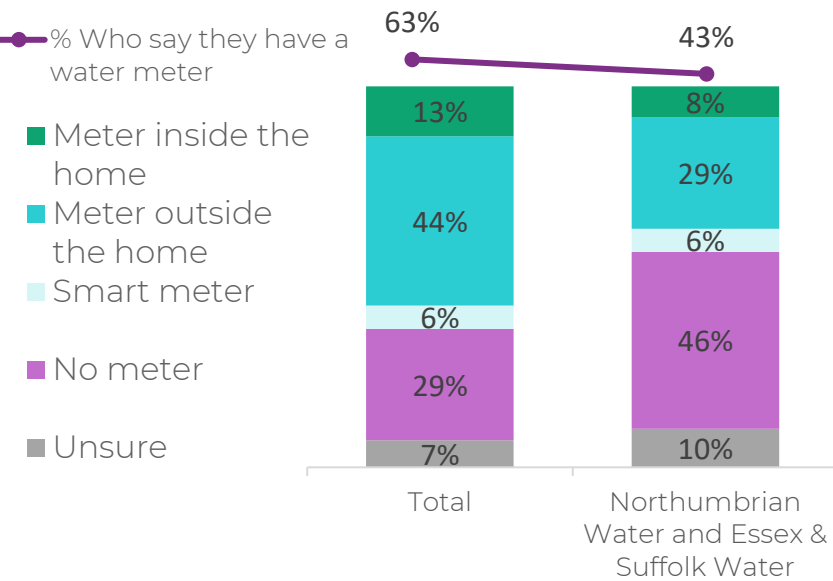
Water Meters

Northumbrian Water and Essex & Suffolk Water community members are less likely than the norm to have a water meter. 29% have a meter outside the home, and only 8% have a meter inside the home.

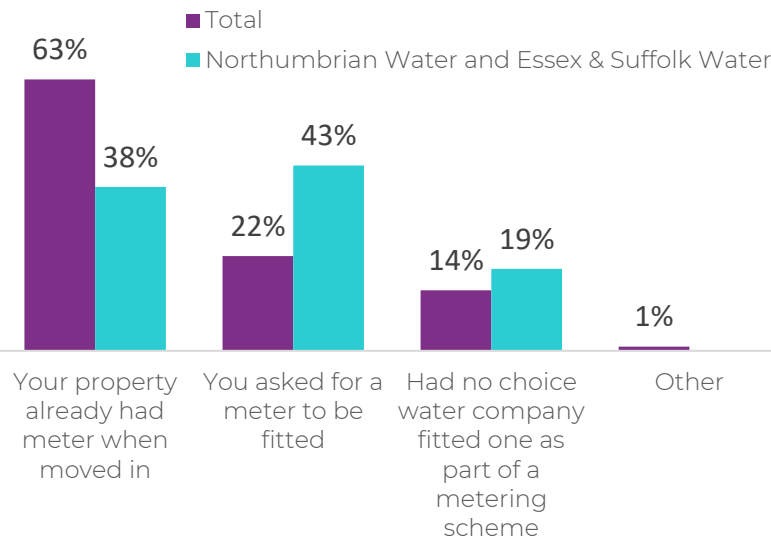
Among Northumbrian Water and Essex & Suffolk Water community members who have a water meter, 43% asked for the meter to be fitted, which is higher than the norm.

Among Northumbrian Water and Essex & Suffolk Water who do not have a smart meter, 67% say they know that households can install a smart water meter.

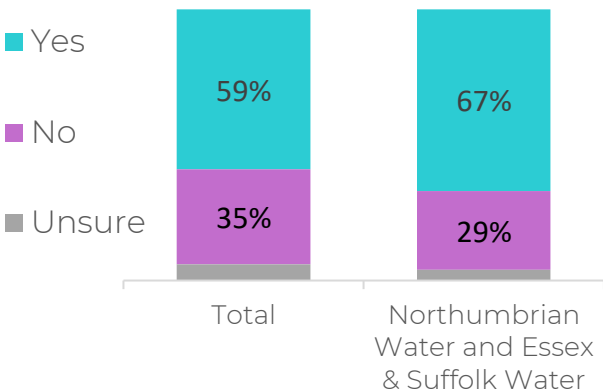
% of Households with a Water Meter



You said that your household had a water meter, which of the following apply to you?



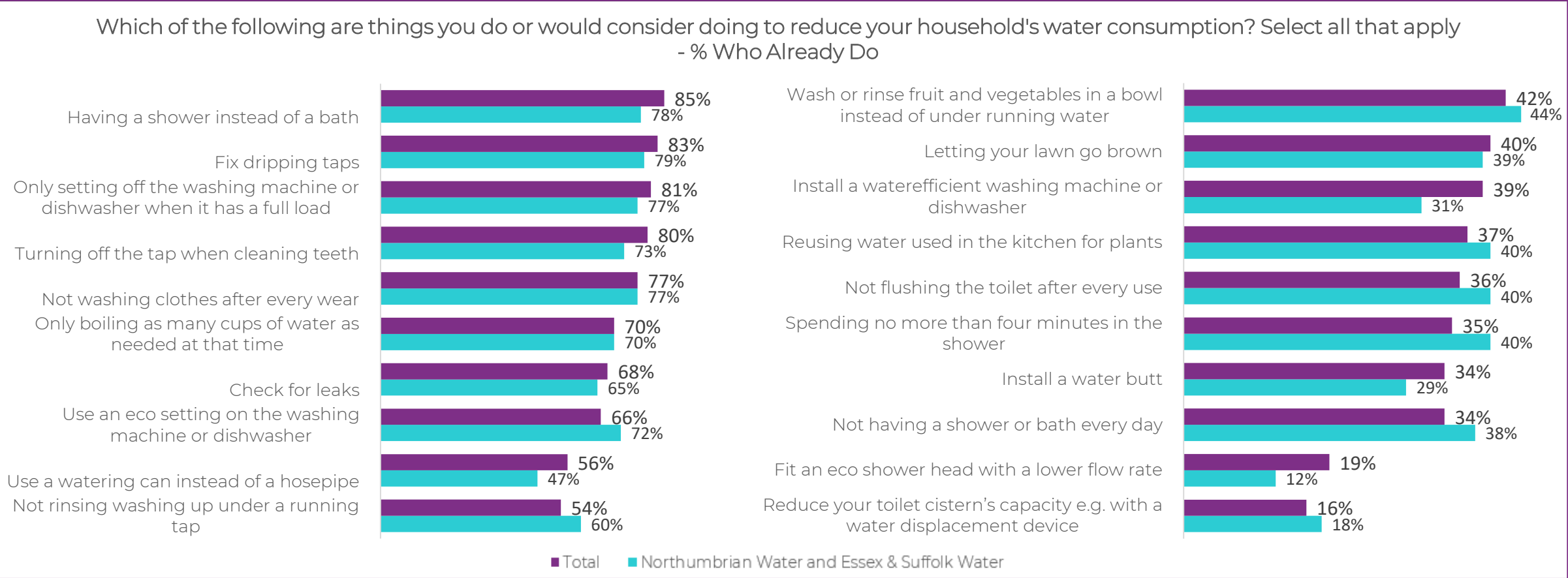
Before today, did you know that some households can have a smart water meter installed?
(Households who do not have a Smart Meter)



Water-Saving Measures

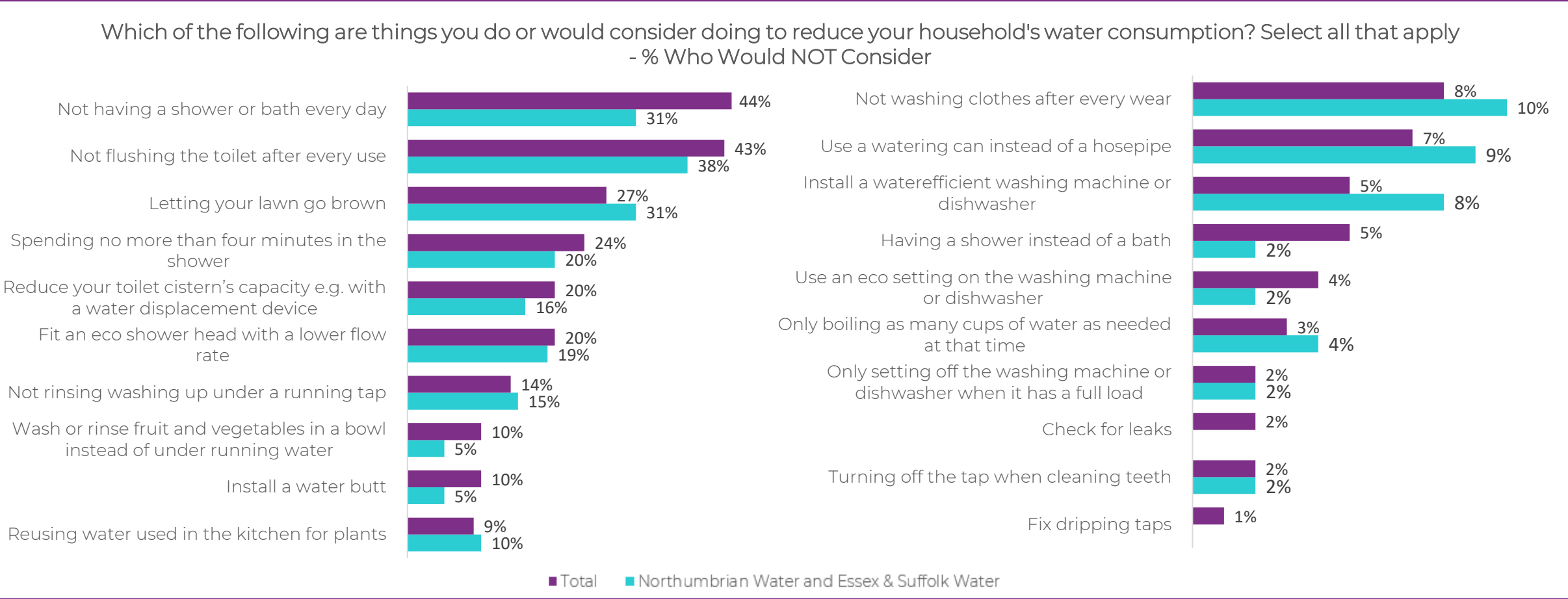


The majority of Northumbrian Water and Essex & Suffolk Water community members say they are already fixing dripping taps, switching to showers instead of baths, only setting off the washing machine and dishwasher with a full load, and not washing clothes after every wear. They are more likely than the norm to use eco settings on the washing machine.



Water-Saving Measures

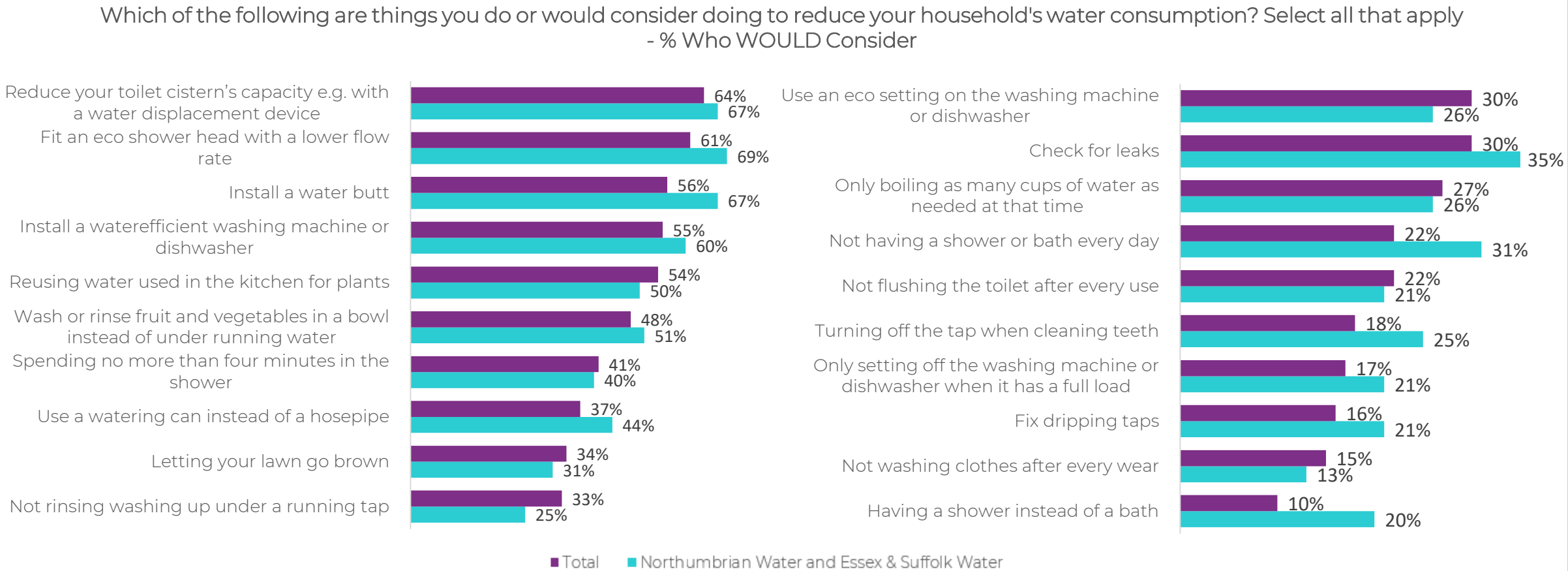
For Northumbrian Water and Essex & Suffolk Water community members, the water-saving measures generating the greatest resistance are not flushing the toilet after every use, not having a shower or bath every day, and letting your lawn go brown.



Water-Saving Measures



For Northumbrian Water and Essex & Suffolk Water community members, the highest levels of openness are to fitting an eco shower head, reducing the toilet cistern’s capacity, and installing a water butt.

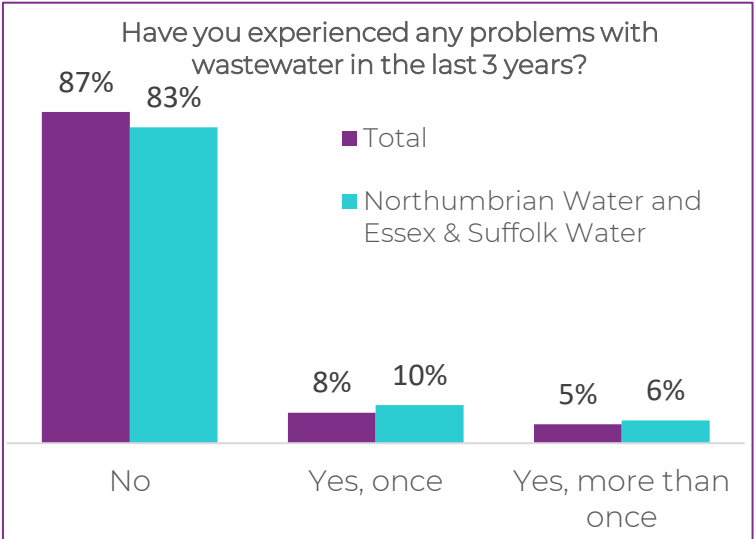
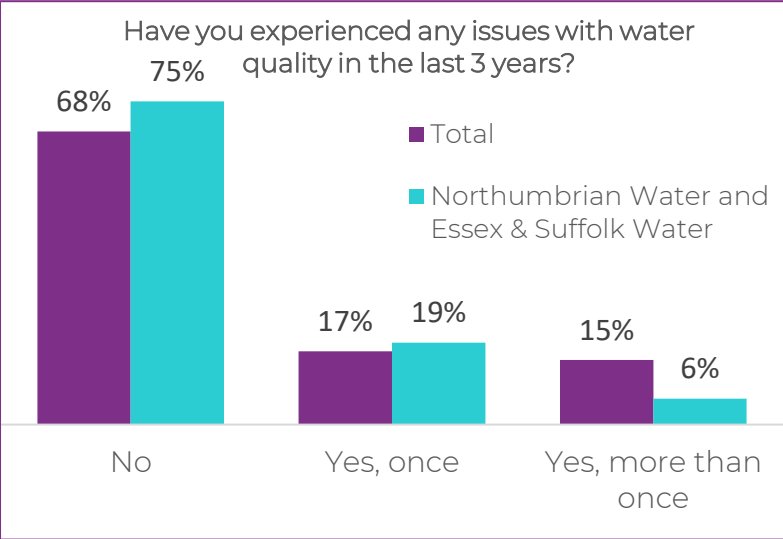
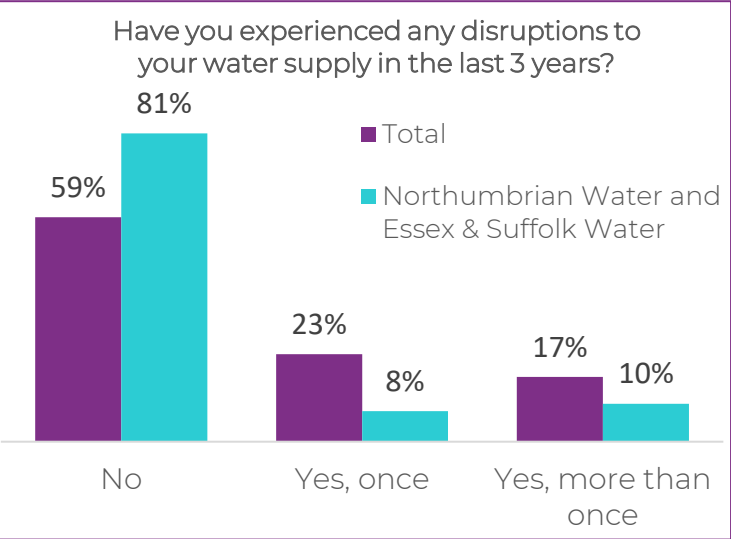


Disruptions & Issues

81% of Northumbrian Water and Essex & Suffolk Water community members say they have not experienced supply disruptions in the last 3 years (higher than the norm). 8% have had one disruption and 10% have had a disruption more than once (below the norm).

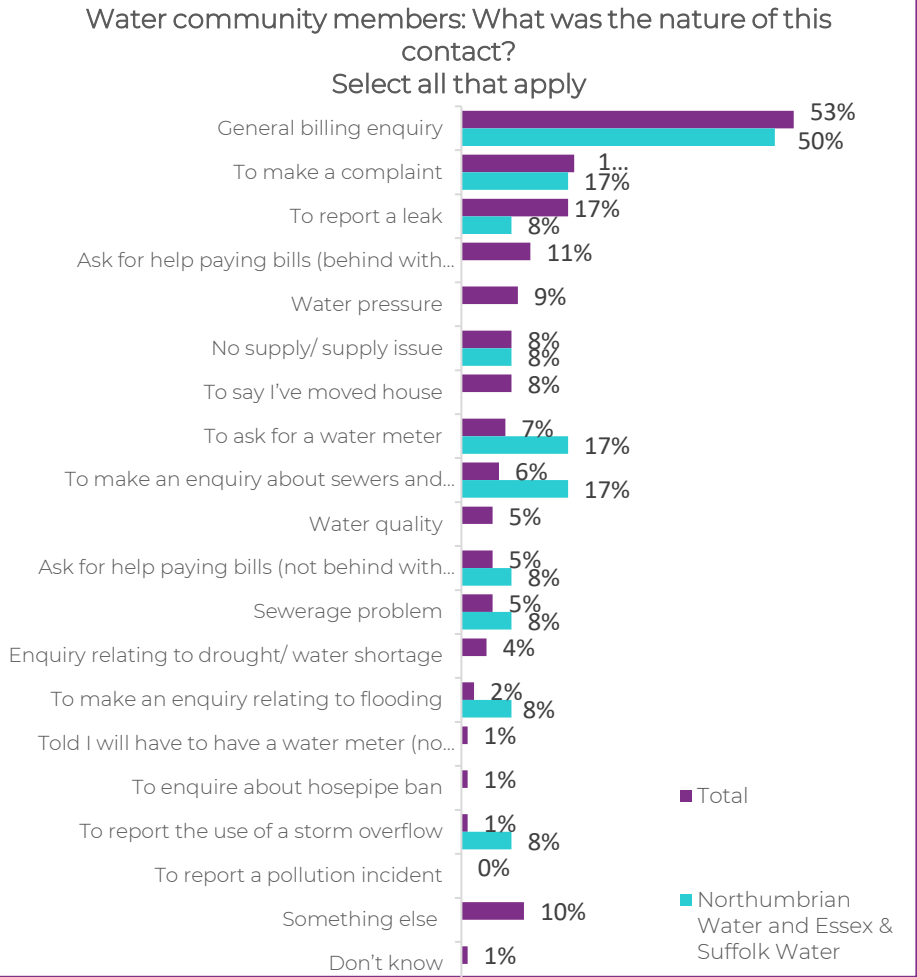
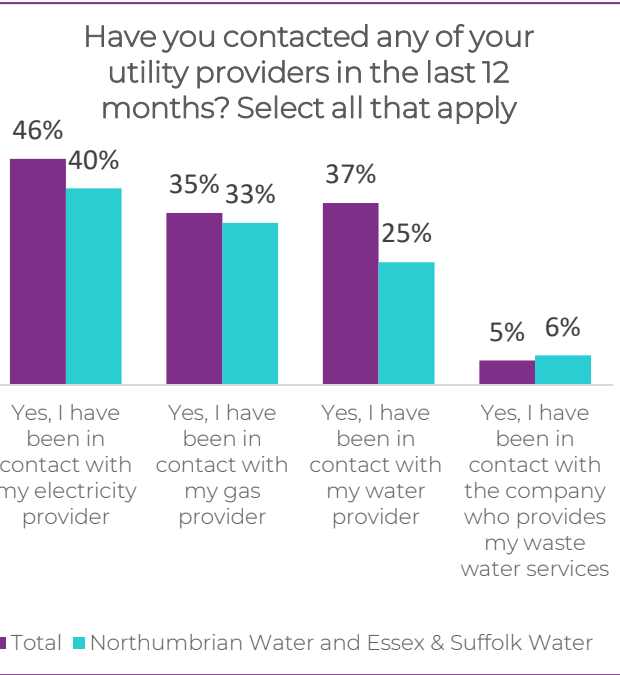
75% of Northumbrian Water and Essex & Suffolk Water community members say they have had no issues with water quality in the last 3 years, higher than the norm. 19% have had one issue and 6% more than one issue (below the norm).

83% of Northumbrian Water and Essex & Suffolk Water community members say they have had no problems in the last 3 years with wastewater (slightly below the norm). 10% have once had an issue and 6% have had an issue more than once.

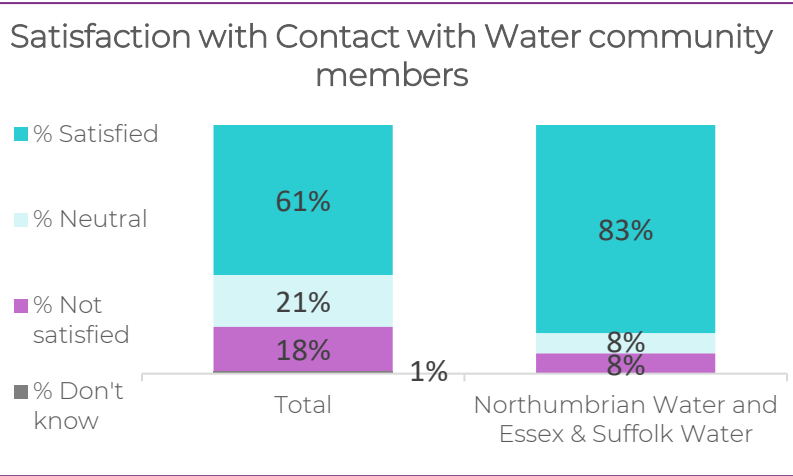


Contact with utility providers

25% of community members have been in contact with Northumbrian Water and Essex & Suffolk Water in the last 12 months (lower than the number who have been in contact with other utility providers).

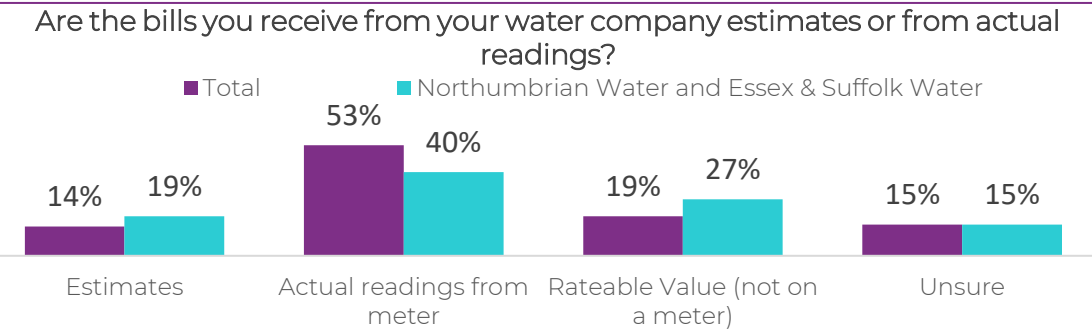


Billing enquiries is the main reason for contacting Northumbrian Water and Essex & Suffolk Water. Asking for a water meter was selected by 17% of Northumbrian Water and Essex & Suffolk Water community members who made contact, higher than the norm of 7%. Making an enquiry about sewers and drains was selected by 17% (higher than the norm). 83% of Northumbrian Water and Essex & Suffolk Water community members who made contact were satisfied with that contact (higher than the norm).

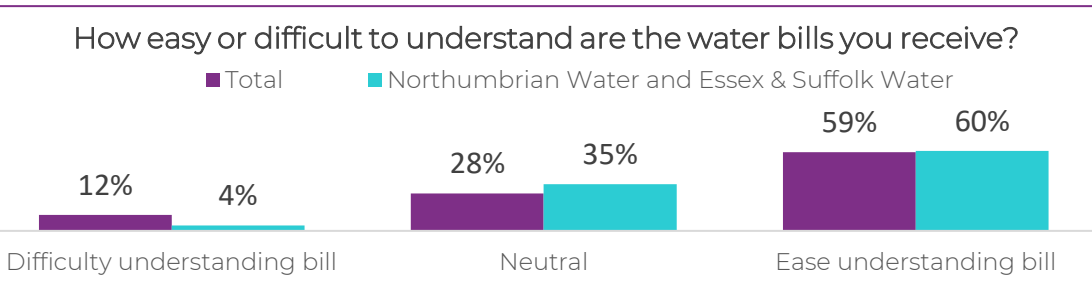


Billing

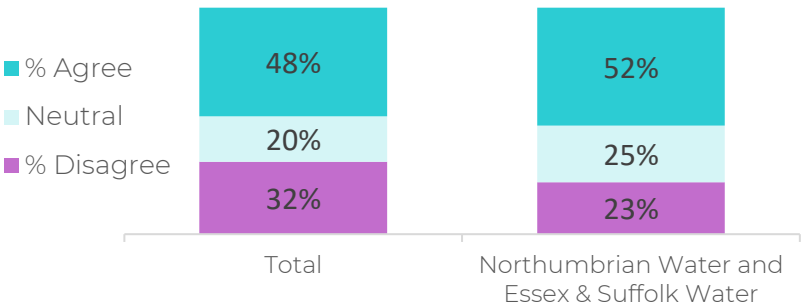
Northumbrian Water and Essex & Suffolk Water community members are more likely than the norm to have their water bills based on rateable value (not on a meter reading).



60% of Northumbrian Water and Essex & Suffolk Water community members find it easy to understand their water bills (in line with the norm).

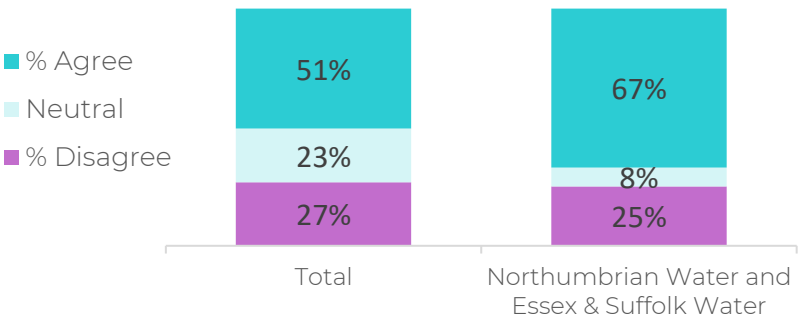


How much do you agree or disagree with the following statements?
I fully understand how my water bill is calculated



52% of Northumbrian Water and Essex & Suffolk Water community members feel they understand how their water bill is calculated, marginally above the norm.

How much do you agree or disagree with the following statements?
The charges I pay for my water bill are affordable to me



Northumbrian Water and Essex & Suffolk Water community members are more likely than the norm to agree their water bills are affordable and less likely to feel neutral about affordability.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Severn Trent Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

Severn Trent Water

What do Severn Trent Water community members hope this panel achieves?



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this panel achieves:

- **Being heard & influencing change:** ensuring customer perspectives leads to meaningful action.
- **Better service, infrastructure & reliability:** clear expectations for improved reliability, communication, and water quality.
- **Greater accountability, communication and education:** desire for companies to listen, act, and show transparency.
- **Environmental protection & sustainable water management:** protect river quality and water sources, less sewage discharge and transitioning towards sustainability.
- **Building a collaborative relationship:** bridge the gap between water companies and community members, helping to shape better services and policies and provide education.

What Severn Trent Water community members have said...

"An understanding of the issues and concerns from the general public." Female, 51, Lives with child/children

"Give feedback to water companies to improve the water quality." Male, 62, Lives with partner and child/children

"Hopefully lots of different ideas will be generated to ensure that the quality and availability of water is maintained. Less loss of water in leaks and wastage. Less pollution of rivers seas and streams. Maybe encouraging water education in schools so that the future generation realise its importance in our lives." Male, 68, Lives with partner

Severn Trent community members want the panel to ensure their voices drive real, meaningful improvements in service quality, environmental protection, transparency, and customer engagement. They hope the process fosters accountability, reduces waste and pollution, improves communication, and leads to a more sustainable, customer-focused water system.

Active community members
Total Base Size: 755
Severn Trent Water Base Size: 49

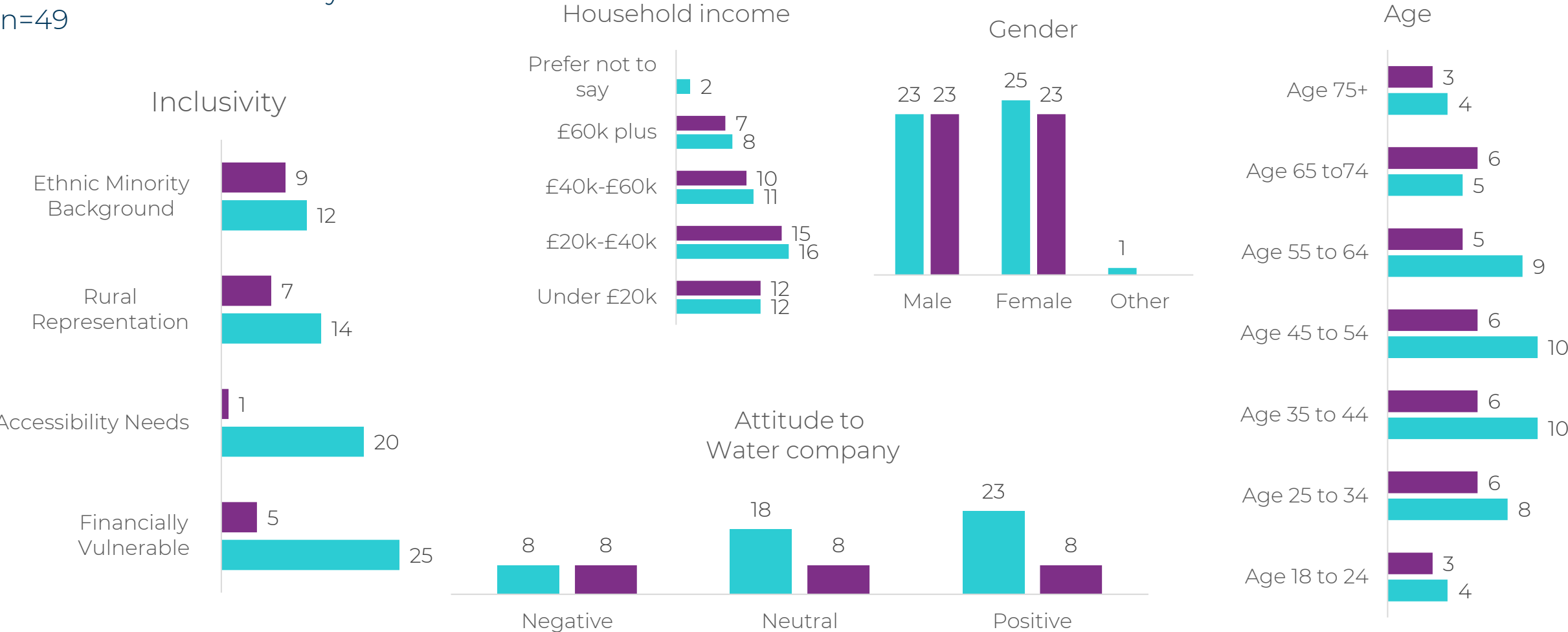
Severn Trent Water

Community population



The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members:
n=49



Sample note: We have met 100% 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.

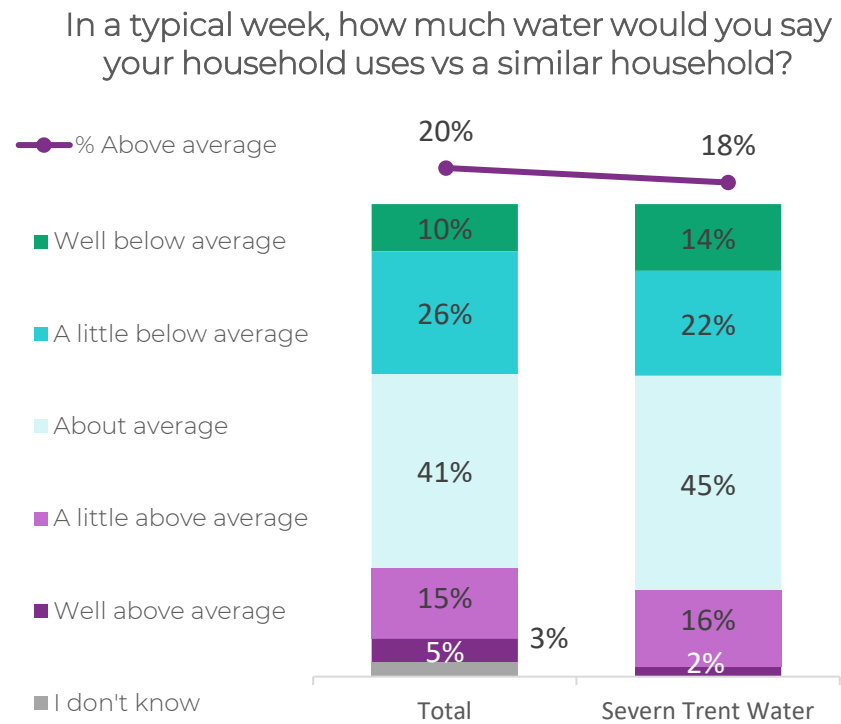
Current Quota Minimum Quota

Water Use at Home



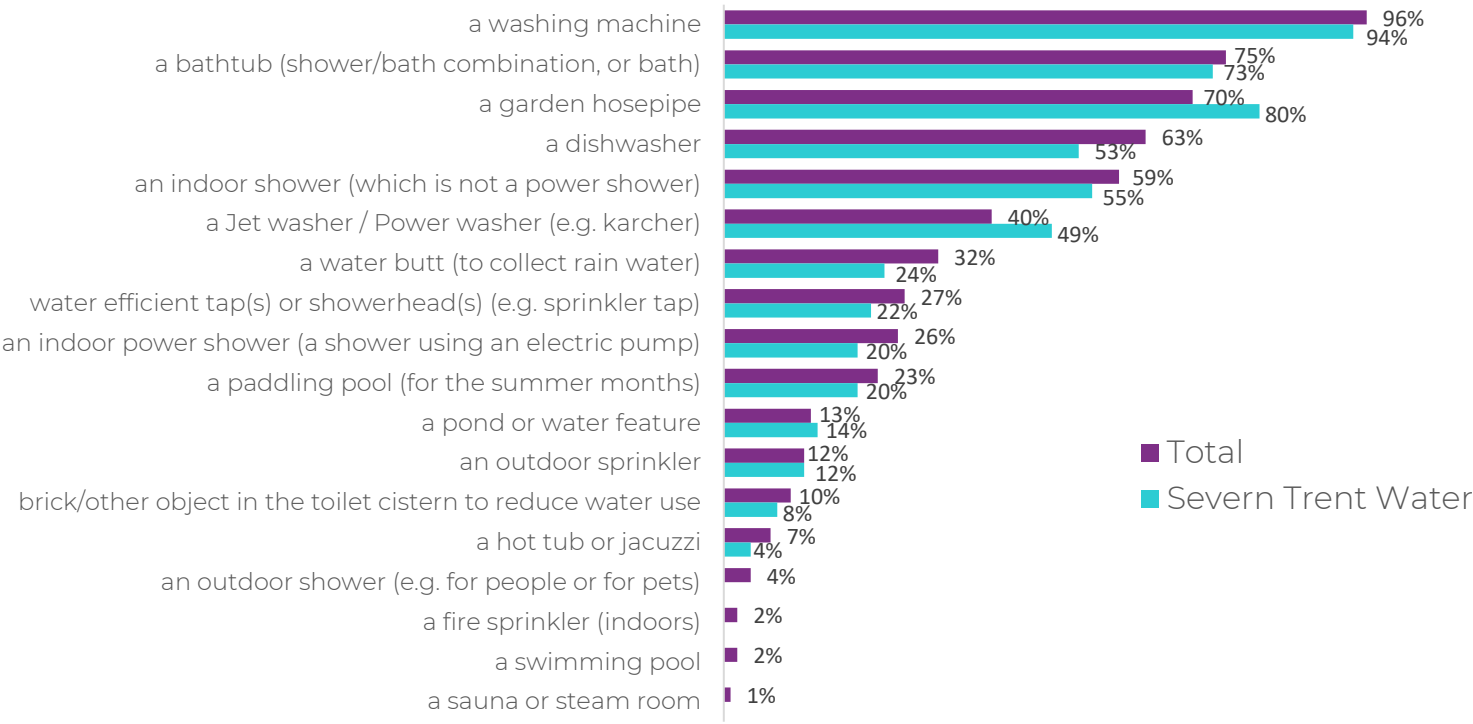
The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members say that they consume an average amount of water, with 45% falling into the ‘about average’ category. Compared to the norm, a lower number indicated consumption that is above or below average.



Severn Trent community members are more likely to have a garden hosepipe and a jet washer / power washer compared to the norm. They are also marginally more likely to have a pond or water feature.

Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



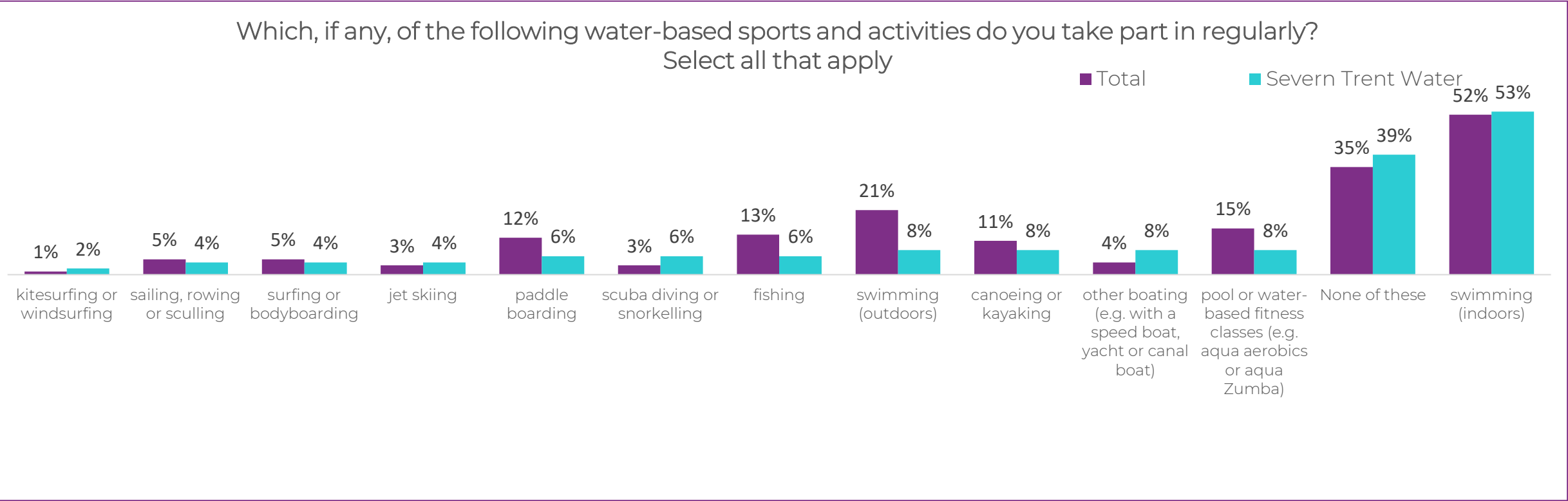
Active community members
Total Base Size: 755
Severn Trent Water Base Size: 49

Water Locations & Activities



The voice for water consumers
Llais defnyddwyr dŵr

Swimming (indoors) is by far the most common water-based activity for Severn Trent community members. Compared with the norm, they are slightly more likely to take part in niche activities such a boating, scuba diving or snorkeling, jet skiing, and kitesurfing or windsurfing, but also more likely to report not regularly taking part in any of the activities listed.



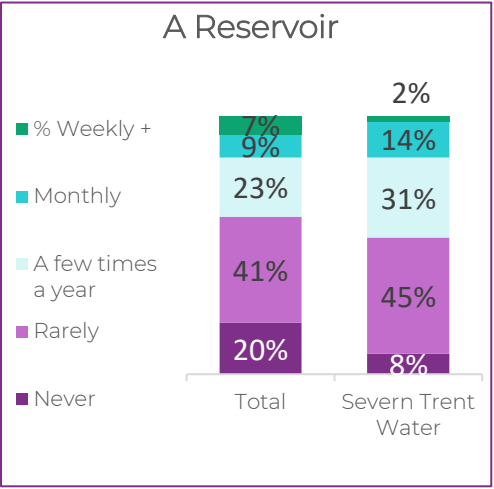
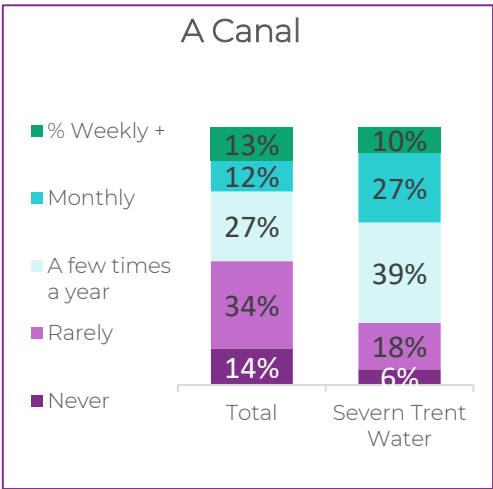
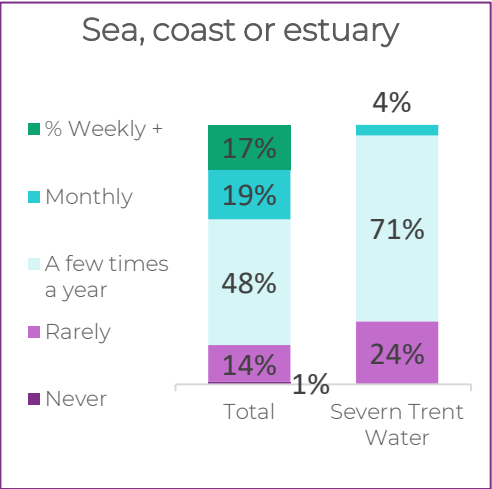
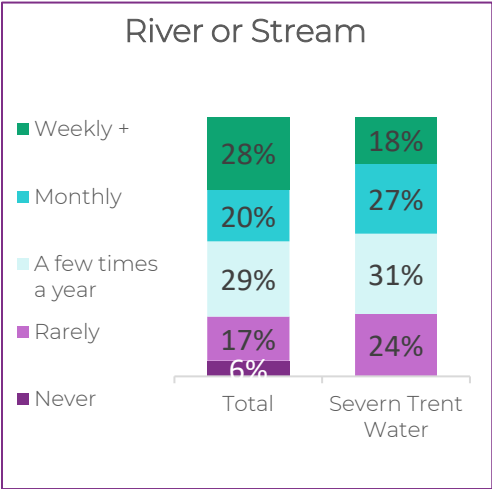
Water Locations & Activities



The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members are far more likely than the norm to visit the sea, coast or estuary just a few times a year and far less likely to go monthly or weekly. They are less likely to never visit a river or stream, a canal, or a reservoir.

How often, if at all, do you spend time by or on the water at any of these places shown below?

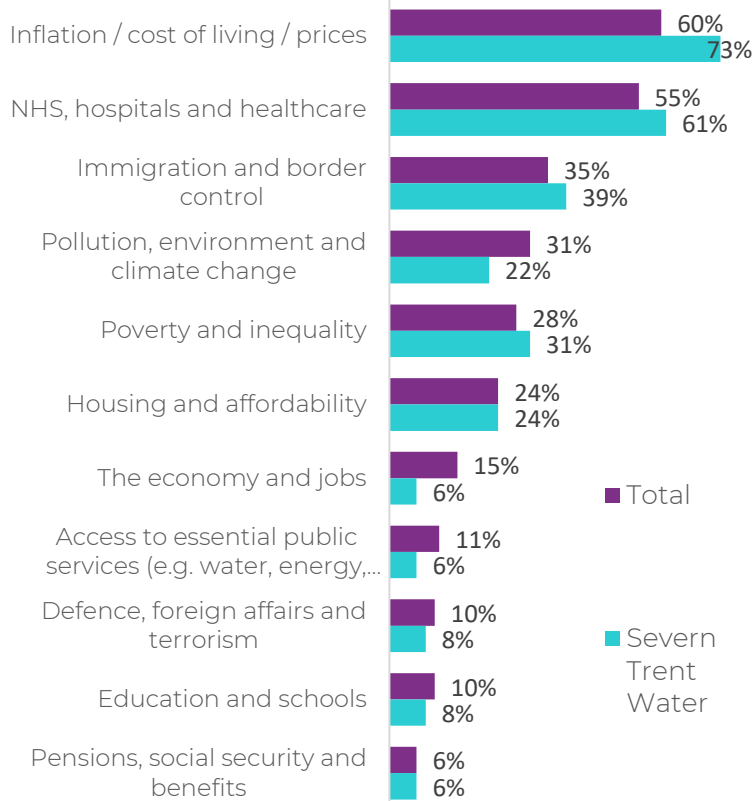


UK Issues

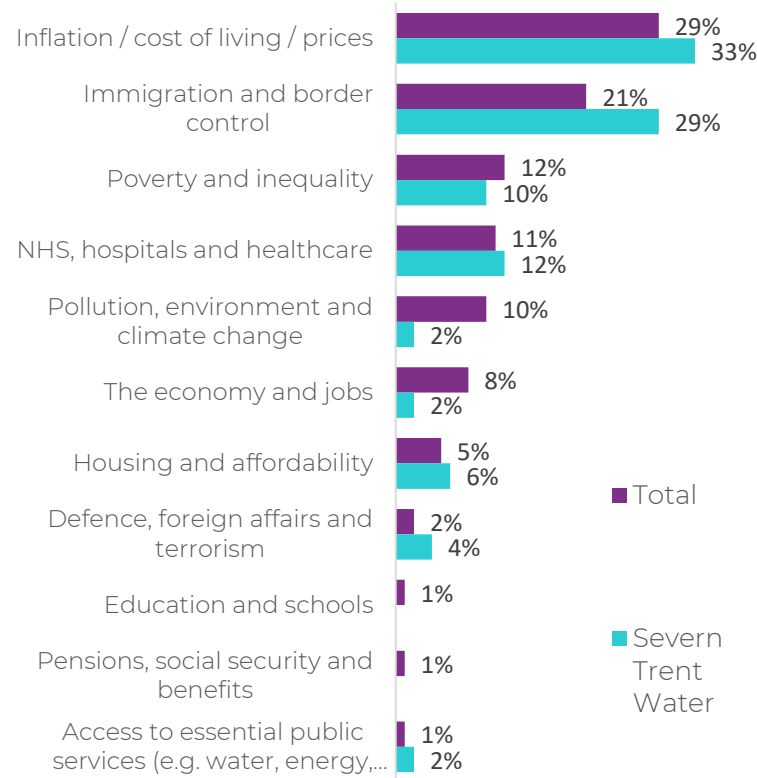


The voice for water consumers
Llais defnyddwyr dŵr

All Issues Facing the UK
- Select up to two



ONE Main issue Facing the UK



Severn Trent community members have told us their top issue is:

- Inflation / cost of living / prices

This is by a slightly higher number than the norm.

Immigration and border control is the second single biggest issue facing the UK. This is by a higher number than the norm.

They are more likely to see the NHS, hospital and healthcare as a bigger issue than poverty and inequality (seen as the third single biggest issue by the norm).

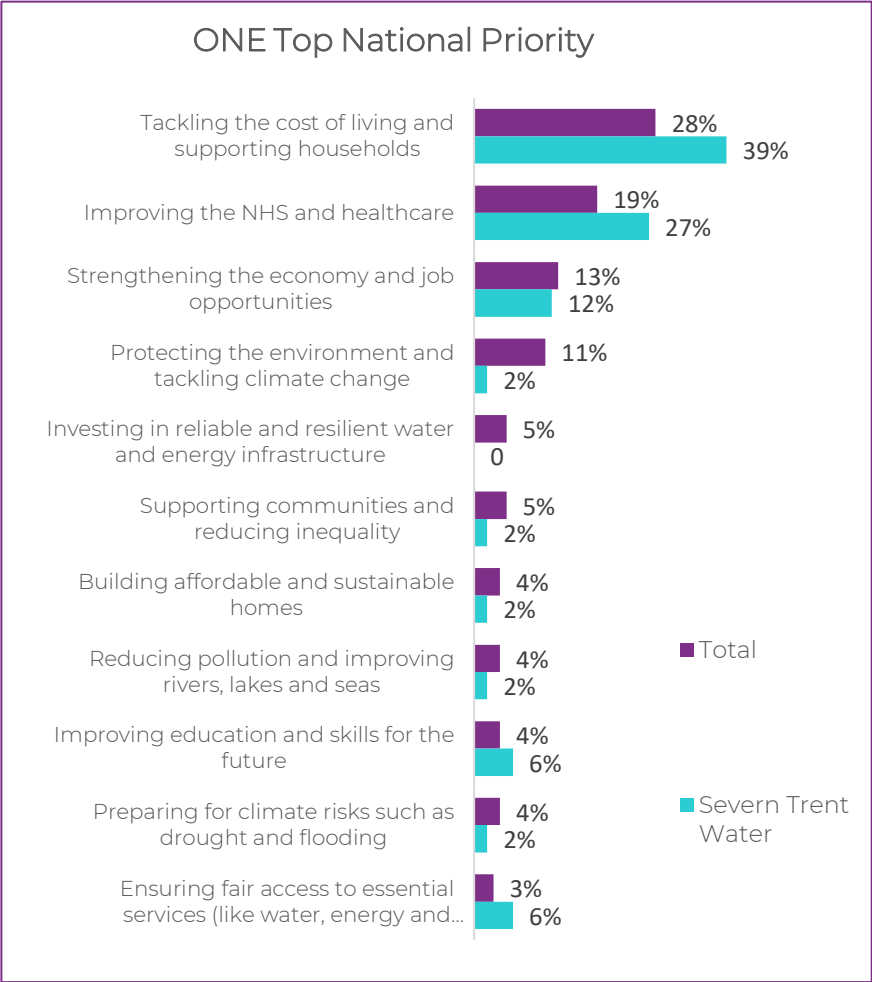
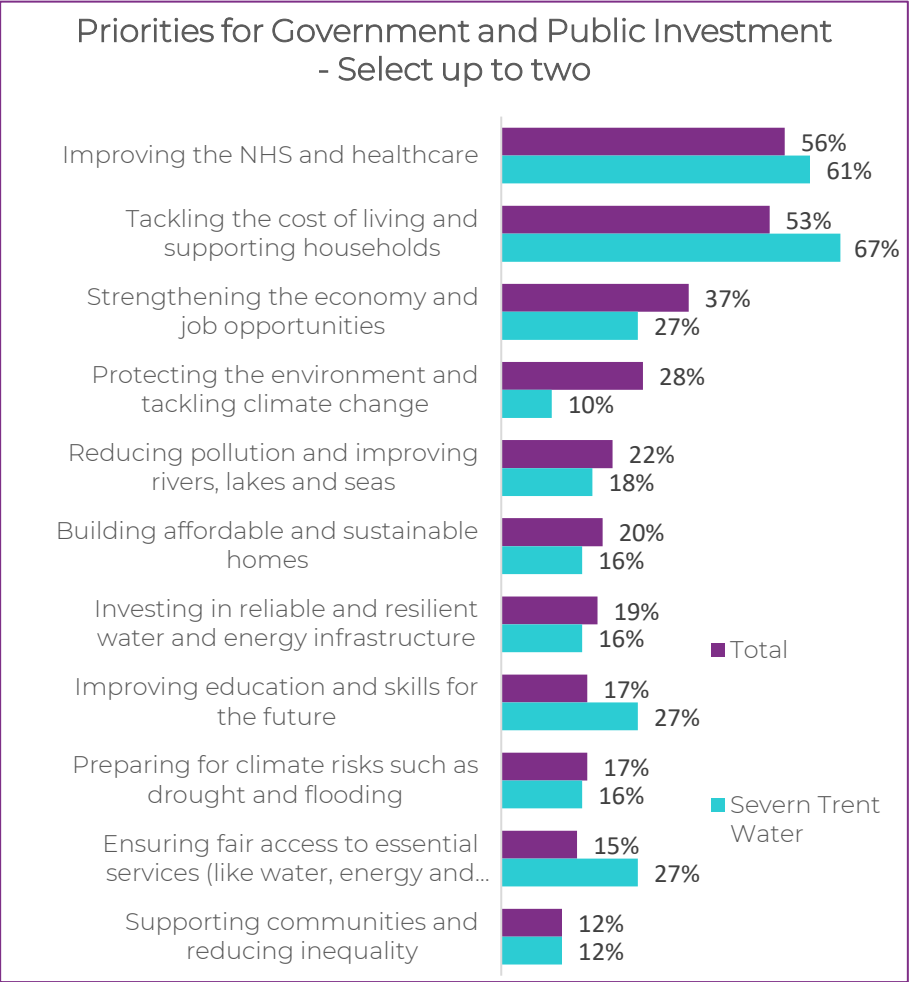
UK Priorities



The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members rank tackling the cost of living and supporting households as the top priority. This is by a higher number than the norm. The second top priority is improving the NHS and healthcare.

Severn Trent community members are also more likely than the norm to see education and fair access to essential services as priorities for the future.



Environment Concerns

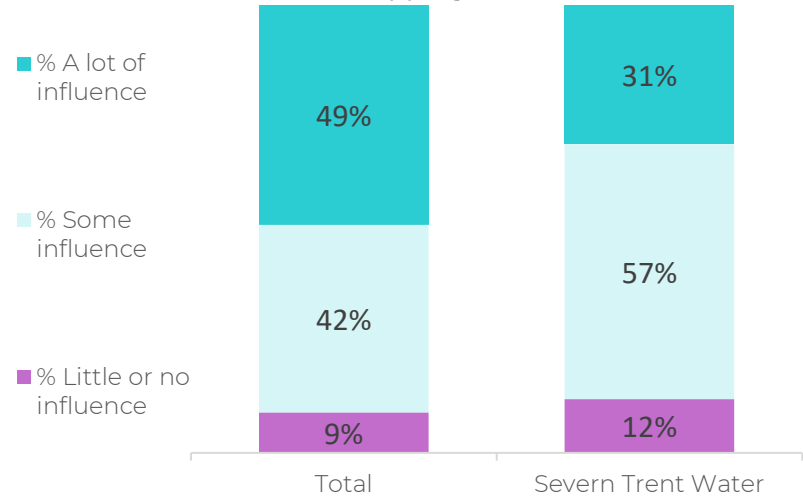
Including saving water & energy



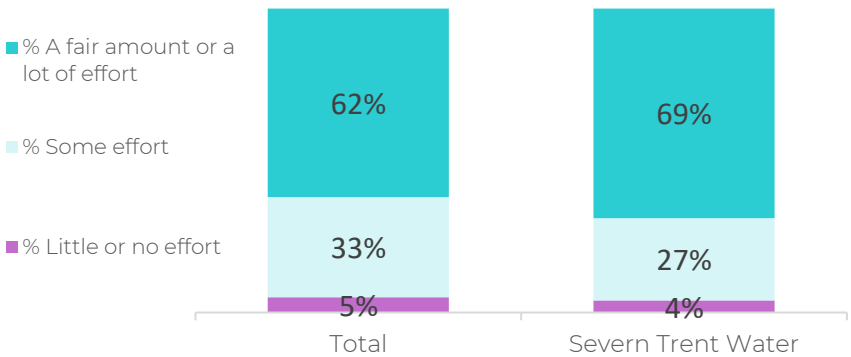
The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members are less likely to say that concern for the environment has a lot of influence on their everyday decisions compared to the norm.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

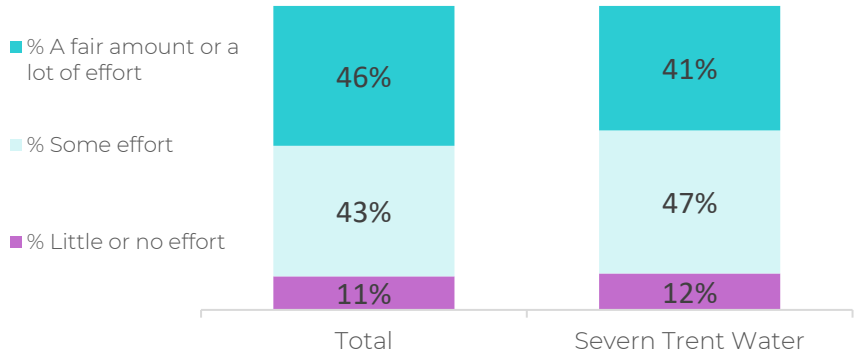


How much effort does your household make at home to save ENERGY?



69% of Severn Trent community members say they make a fair amount or a great deal of effort to save energy. This is slightly higher than the norm.

How much effort does your household make at home to save WATER?



Severn Trent community members are less likely to make a fair amount or a lot of effort to save water compared to the norm.

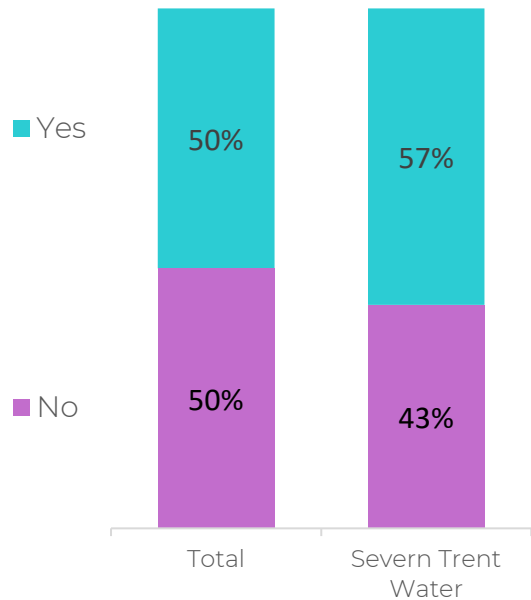
Priority Services Register



The voice for water consumers
Llais defnyddwyr dŵr

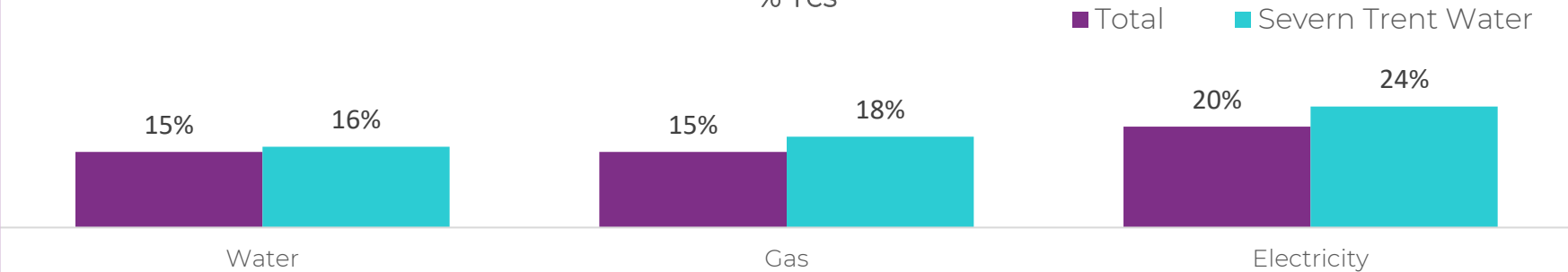
Overall, 57% of Severn Trent community members say they have heard of the Priority Services Register.

Before today, had you heard about the Priority Services Register?

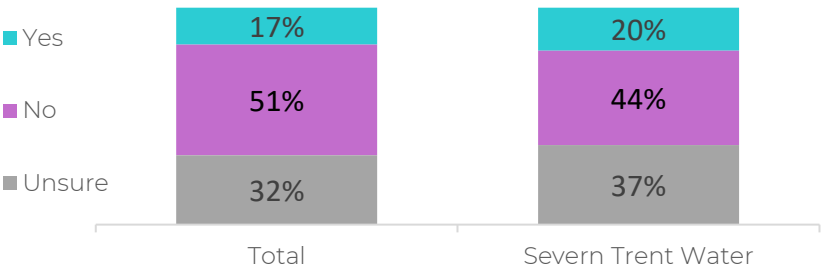


A higher proportion of Severn Trent community members say they are on the Priority Services Register for electricity than for gas or water and they are more likely to be on the registers compared to the norm.

Are you on the Priority Services Register (PSR) for any of the following? Select all that apply
- % Yes



Do you think you should be on the Priority Services Register for water?



For those not currently on the Priority Services Register for water, 20% of Severn Trent community members think they should be on it.

Water Meters

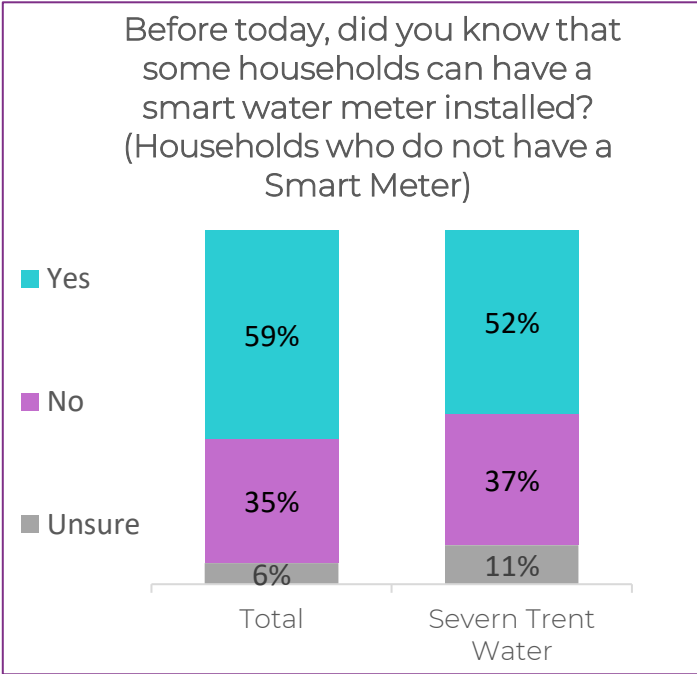
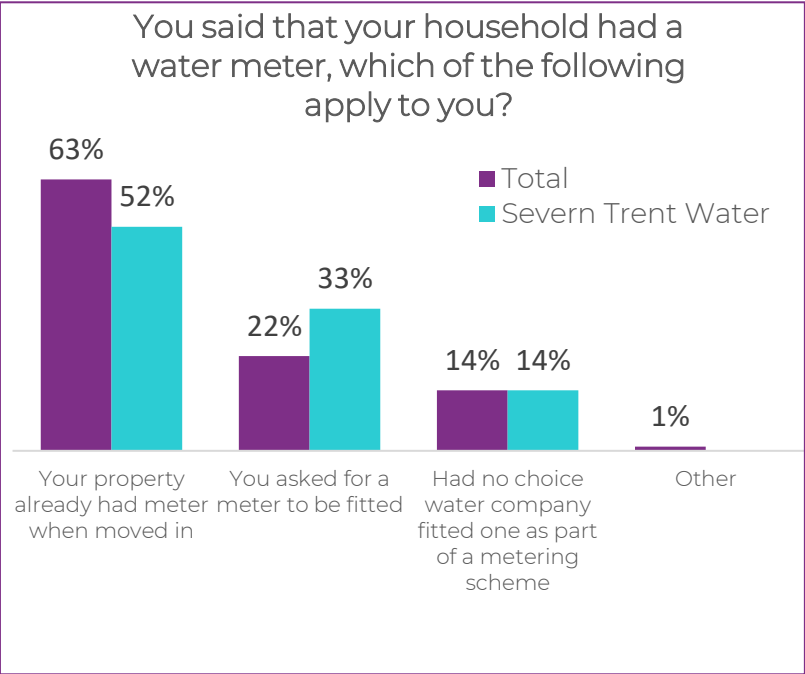
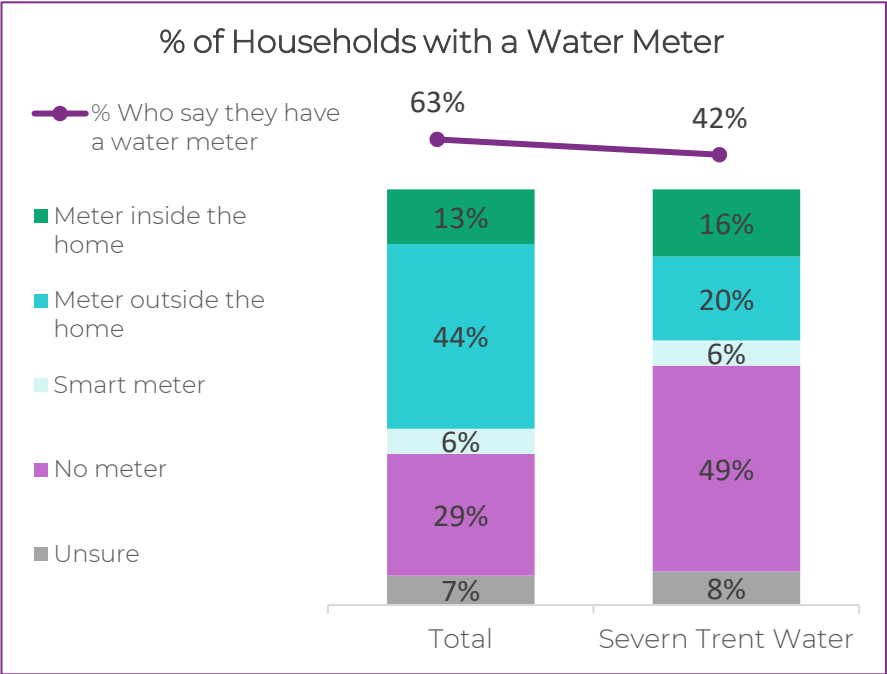


The voice for water consumers
Llais defnyddwyr dŵr

Severn Trent community members are more likely than the norm to say they have no water meter at home. Compared to the norm, they are less likely to have a meter outside of the home but more likely to have a meter inside the home.

Among Severn Trent community members who have a water meter, 52% already had a meter when they moved into the property. This is below the norm.

52% of Severn Trent community members say they know that households can have a smart water meter installed. This is slightly lower than the norm.



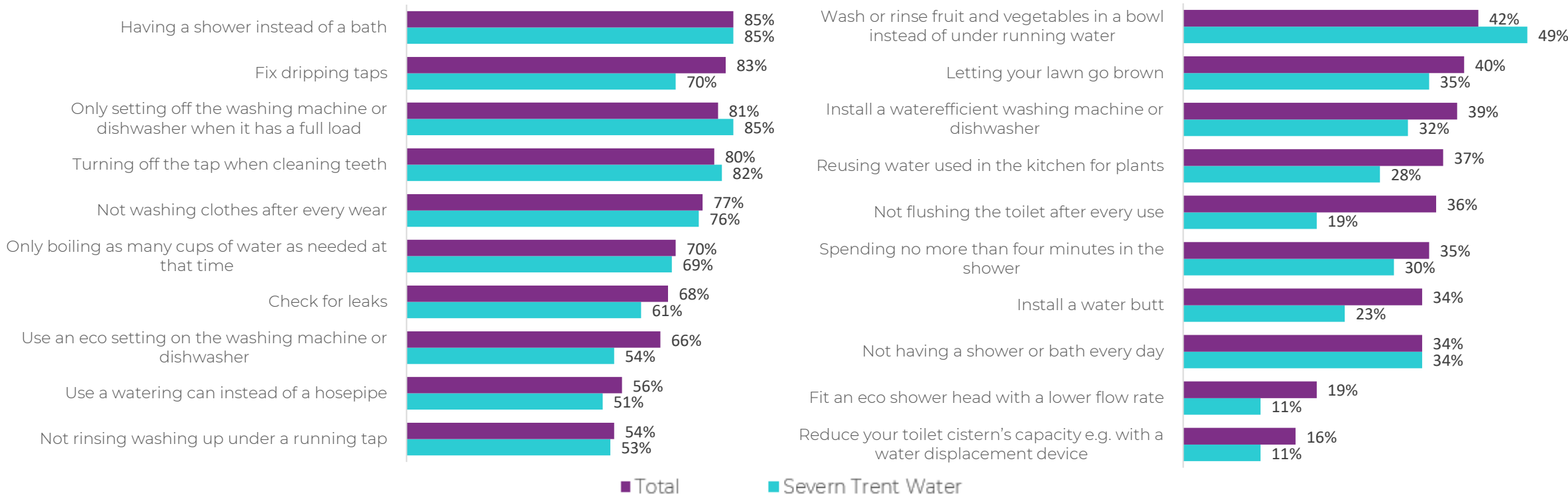
Water-Saving Measures



The voice for water consumers
Llais defnyddwyr dŵr

The majority of Severn Trent community members (a higher number compared to the norm) say they are already only setting off the washing machine or dishwasher when it has a full load and turning off the tap when cleaning teeth. They are slightly less likely than the norm to fix dripping taps, check for leaks, and use an eco setting on the washing machine or dishwasher.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who Already Do

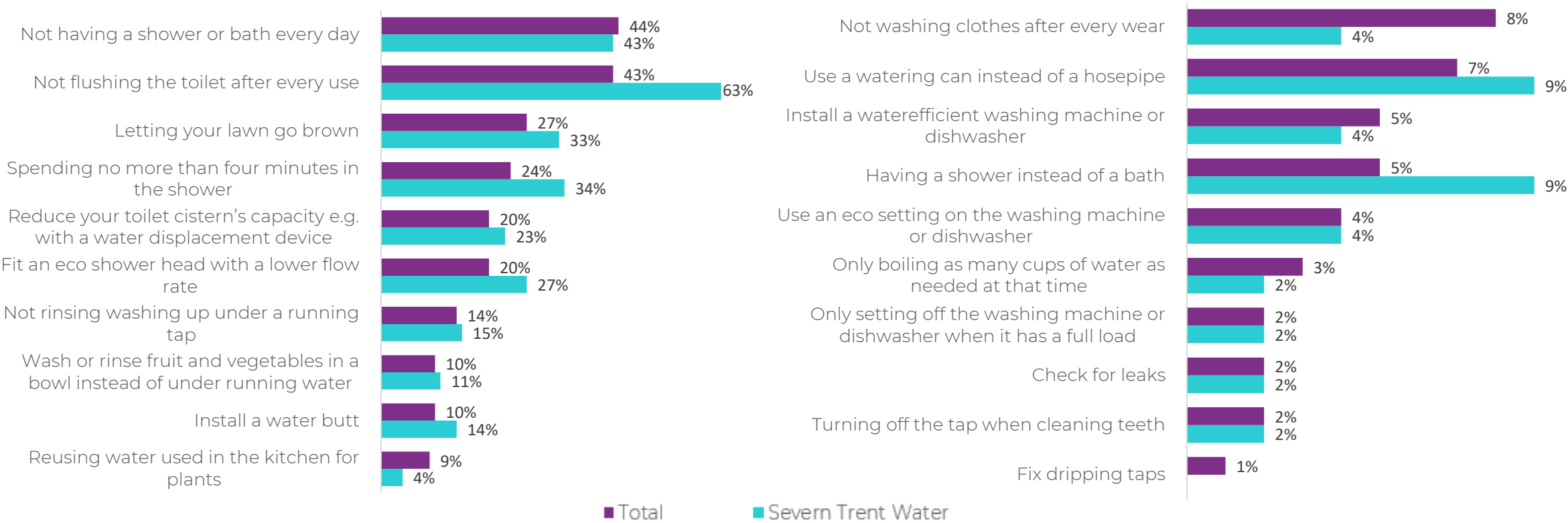


Active community members
Total Base Size: 755
Severn Trent Water Base Size: 49

Water-Saving Measures

For Severn Trent community members, the water-saving measure generating the greatest resistance is not flushing the toilet after every use (higher than the norm). This is followed by not having a bath / shower every day.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who Would NOT Consider

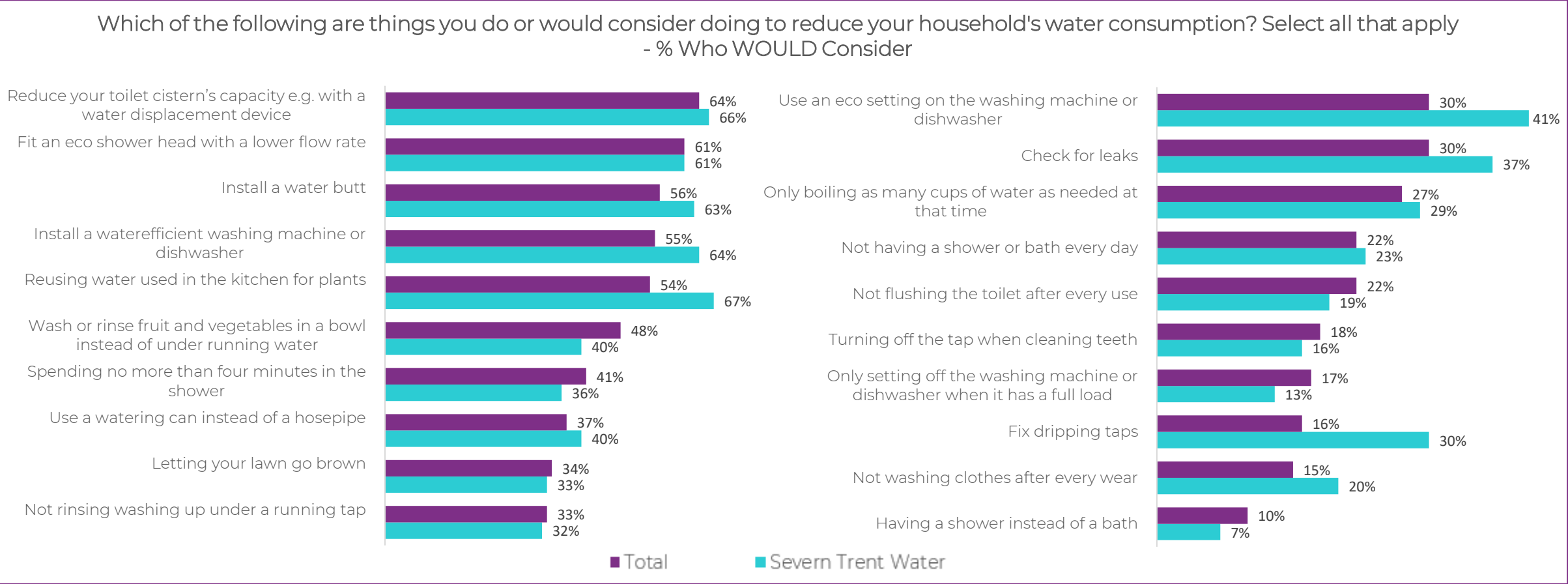


Water-Saving Measures



The voice for water consumers
Llais defnyddwyr dŵr

For Severn Trent community members, the highest levels of openness are to reusing water used in the kitchen for plants, reducing toilet’s cistern capacity, and installing a water-efficient washing machine or dishwasher.



Active community members
Total Base Size: 755
Severn Trent Water Base Size: 49

Disruptions & Issues

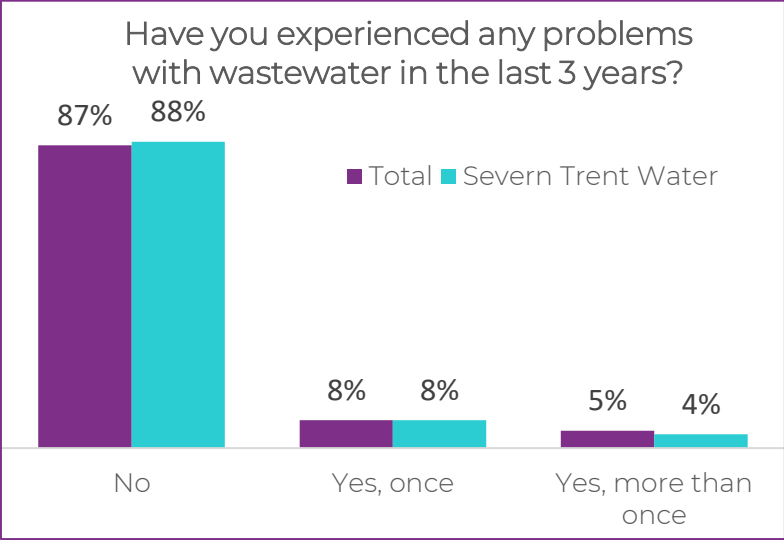
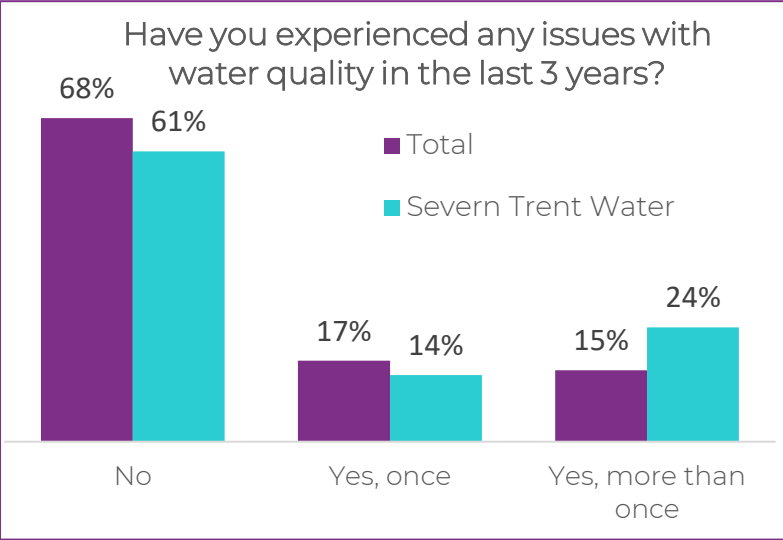
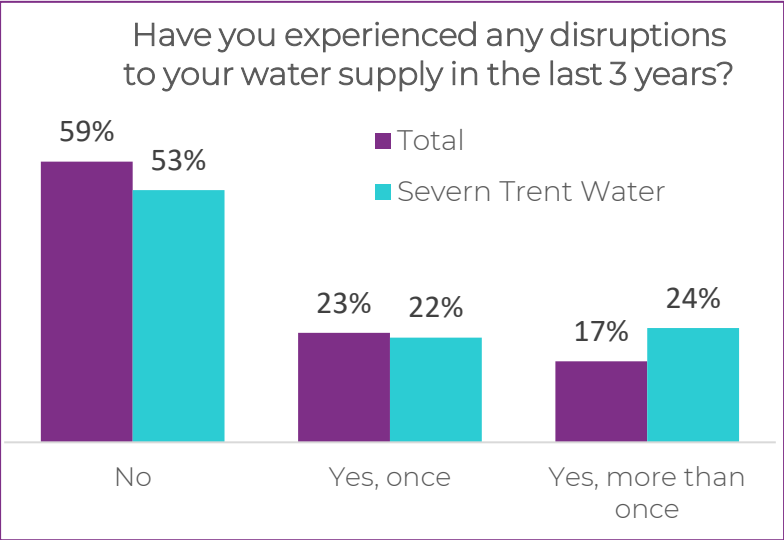


The voice for water consumers
Llais defnyddwyr dŵr

53% of Severn Trent community members say they have not experienced supply disruptions in the last 3 years (slightly lower than the norm). 24% have had disruption more than once (higher than the norm) and 22% have had one disruption.

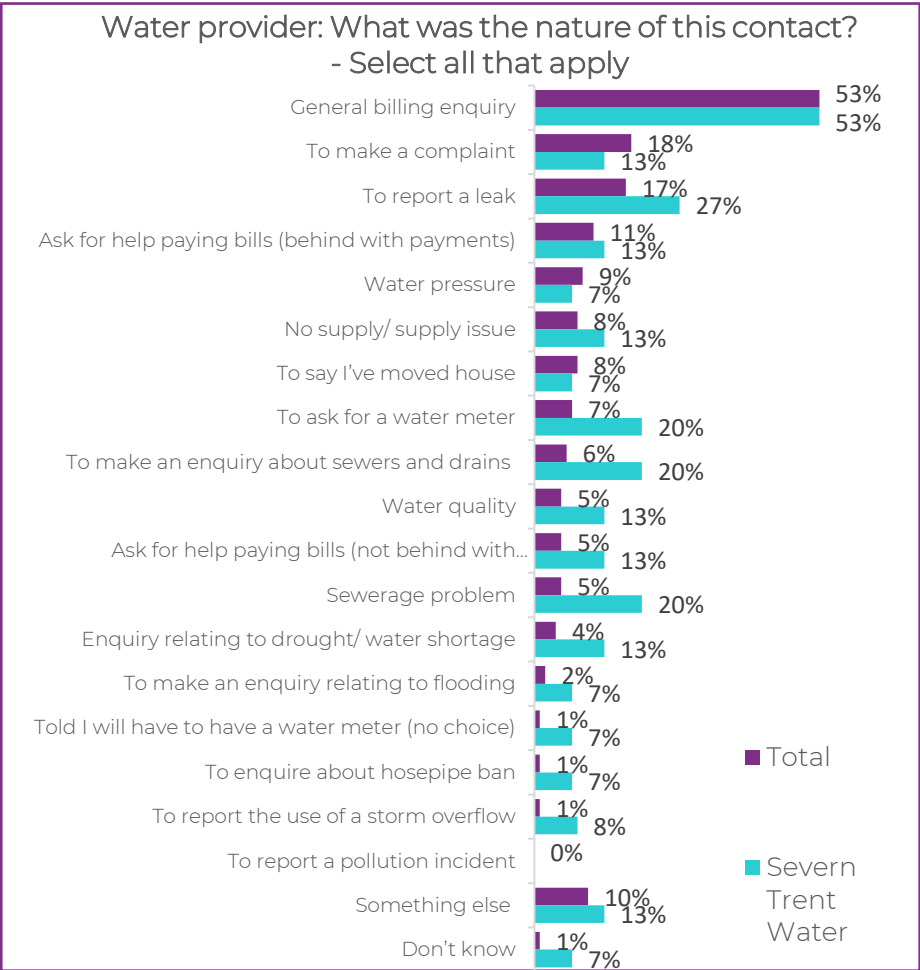
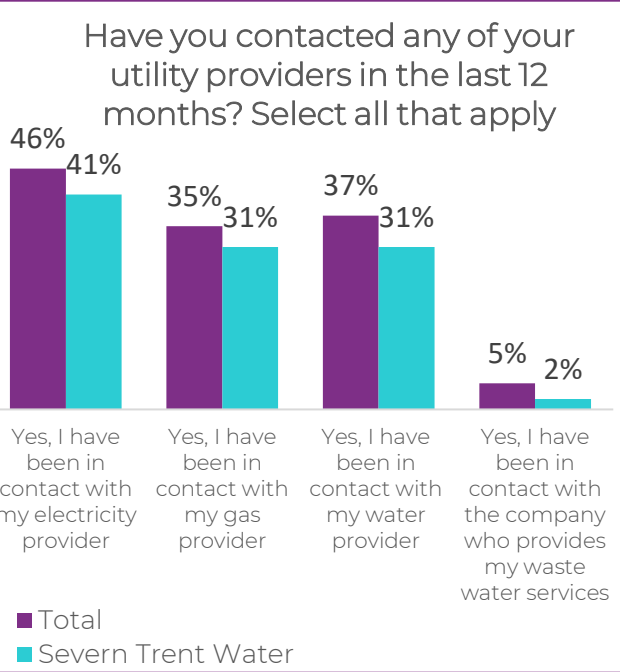
61% of Severn Trent community members say they have had no issues with water quality in the last 3 years, which is lower than the norm. 24% have had an issue more than once (higher than the norm) and 14% have had one issue.

88% of Severn Trent community members say they have had no problems in the last 3 years with wastewater (in line with the norm). 8% have once had an issue and 4% have had an issue more than once.

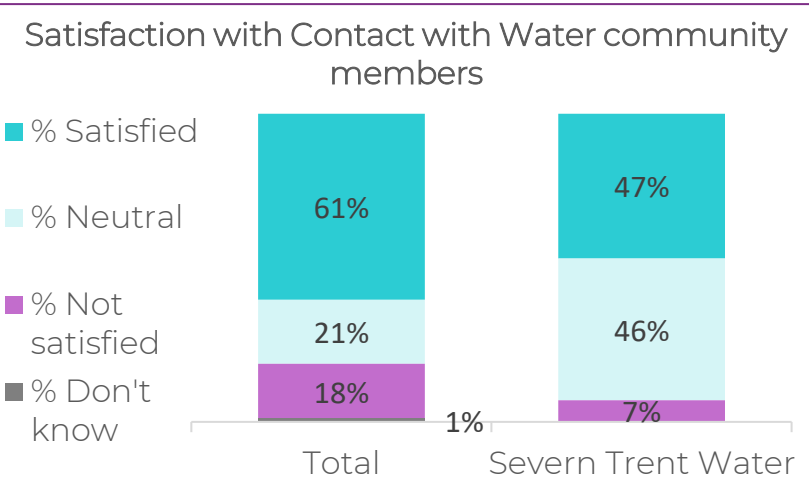


Contact with utility providers

31% of community members have been in contact with Severn Trent in the last 12 months (the same number as those who have been in contact with their gas community members, and slightly lower than the number who have been in contact with their electricity providers).



Billing enquiries is the main reason for contacting Severn Trent. Reporting a leak was selected by 27% of Severn Trent community members who made contact, higher than the norm of 17%. Compared to the norm, a higher number of community members made contact to ask for a water meter, enquire about sewers and drains and report a sewerage problem. 47% of Severn Trent community members who made contact were satisfied with that contact. This is lower than the norm.

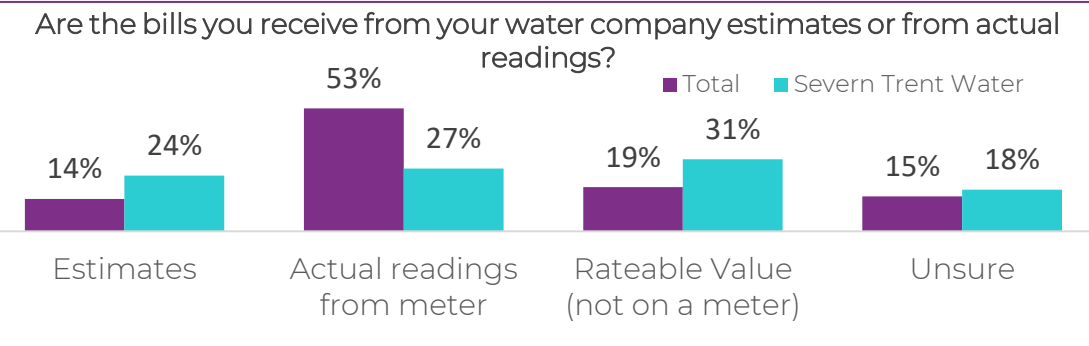


Billing

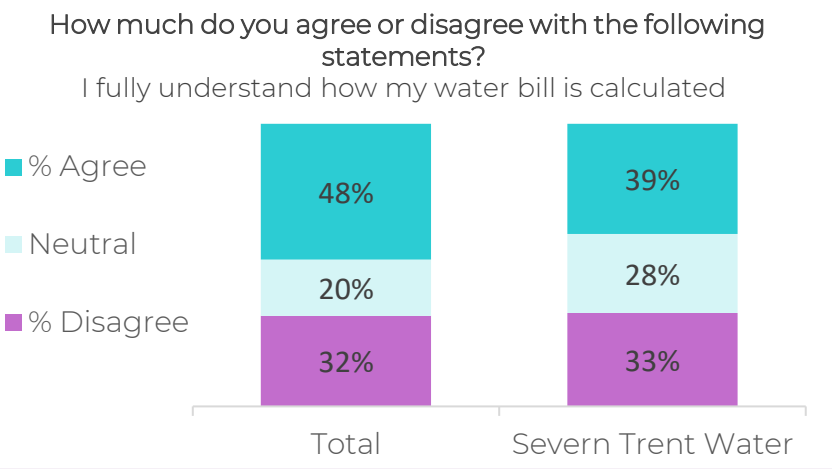
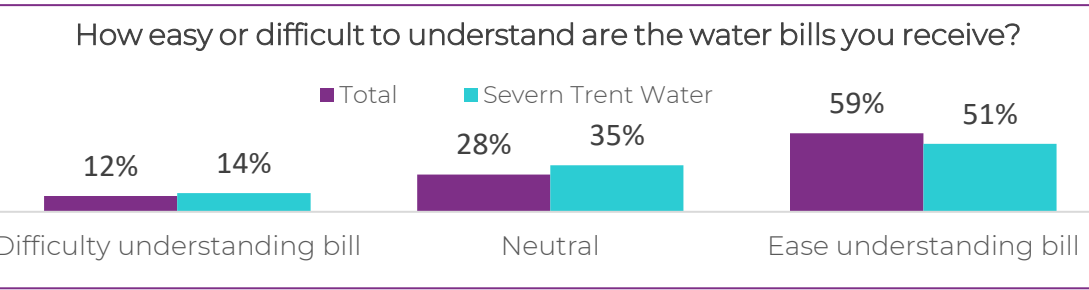


The voice for water consumers
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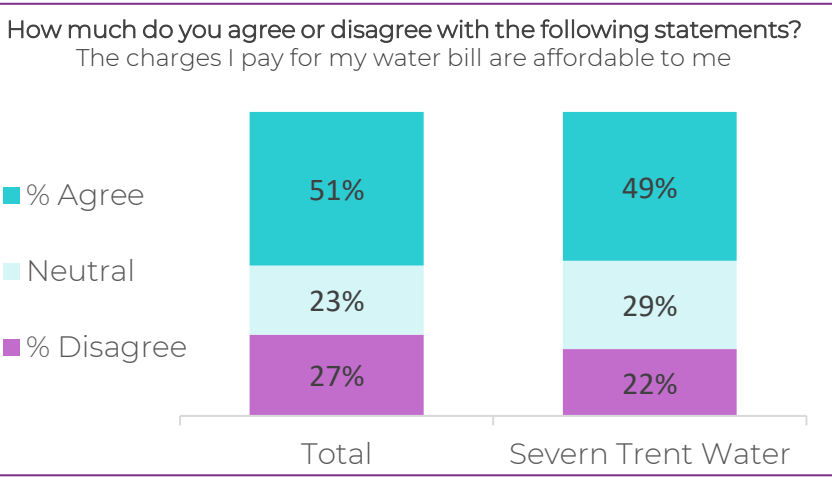
Severn Trent community members are more likely than the norm to have their water bills based on rateable value and estimates and much less likely to have actual meter readings as the base.



51% of Severn Trent community members say they find it easy to understand their water bills (slightly below the norm).



39% of Severn Trent community members feel they understand how their water bill is calculated. This is below the norm.



Severn Trent community members are more likely than the norm to feel neutral about the affordability of their water bills.



The voice for water consumers
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Water Voice

'Getting to know you' Report

South West Water including 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)

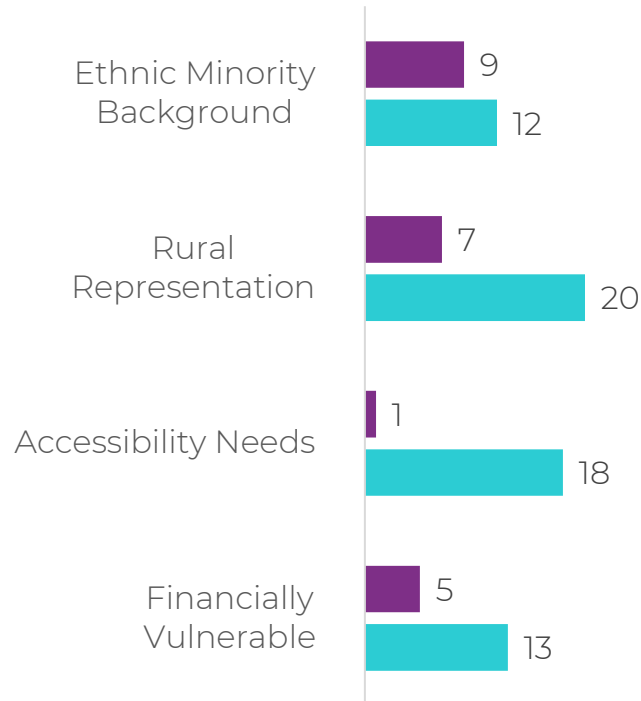
Community population



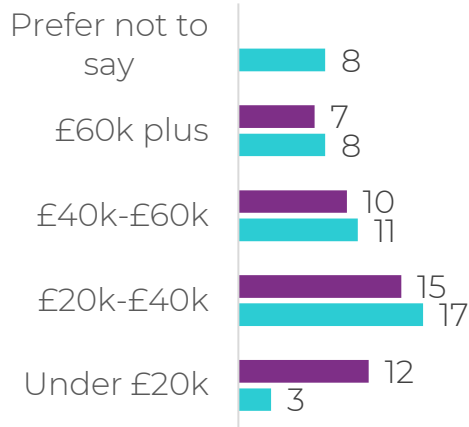
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South West Water community members : n=15
Bristol Water community members: n=27
Bournemouth Water community members: n= 5

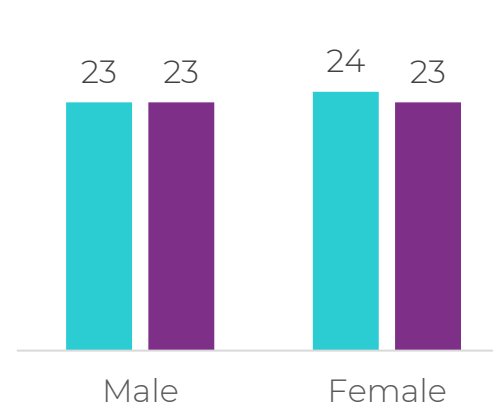
Inclusivity



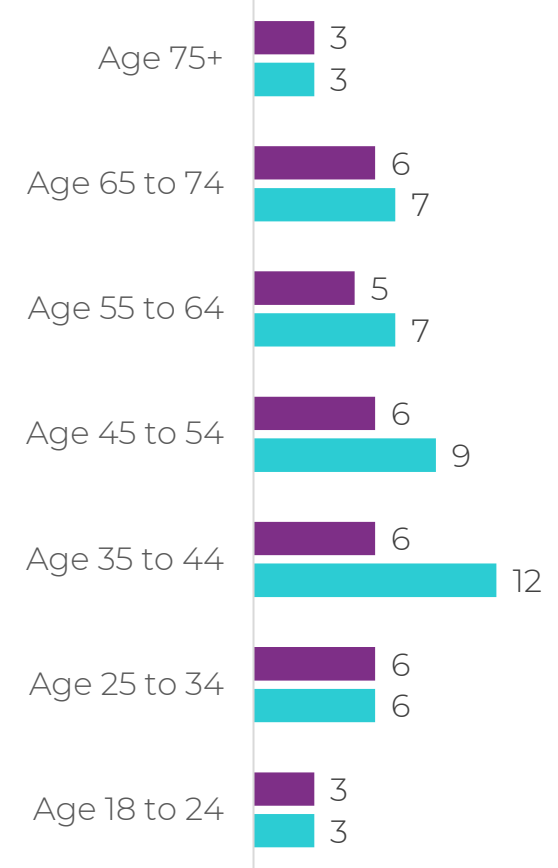
Household income



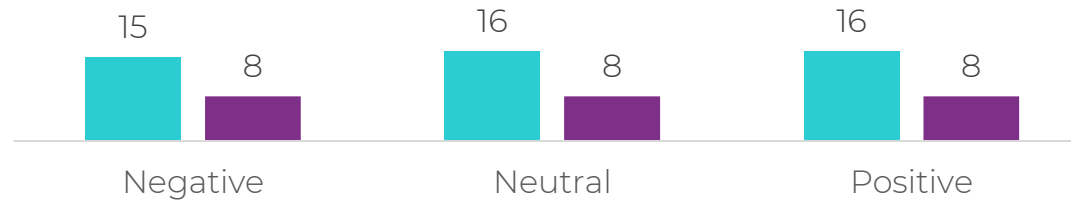
Gender



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 we were able to reach our financially vulnerable community members 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.

Current Quota Minimum Quota

South West Water, Bristol Water & Bournemouth Water

What do community members hope this community achieves?



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- Being heard & influencing change: ensuring customer perspectives lead to meaningful action.
- Improve service quality, standards and customer experience: better operating practices and higher more consistent standards across the UK.
- Accountability, transparency and responsible use of money: a greater openness and responsibility from water companies.
- Environmental protection & better water management: Improve waterways and reduce pollution. Better, more efficient management.
- Building a collaborative relationship: bridge the gap between water companies and community members, helping to shape better services and policies.



What South West Water, Bristol Water & Bournemouth Water community members have said...

“Honest feedback from the public that the water companies can use to improve their service.” Female, 31, Lives with partner and child/children, Bournemouth Water

“A better standard of customer service and water efficiency across the UK water companies.” Male, 59, Lives alone, Bristol Water

“Positive outcomes for community and environment.” Female, 54, Lives alone, South West Water

“Hopefully it actually makes water companies take a step back listen and take action.” Female, 23, Lives with partner and child/children, South West Water



Our community members want to ensure their voices genuinely guide improvements in service quality, transparency, accountability, and environmental responsibility. They hope the process strengthens communication, highlights what's going wrong, and drives meaningful, customer-centred action across water companies.

Active community members
Total Base Size: 755
South West, Bristol & Bournemouth Water Base Size: 47

Water Use at Home

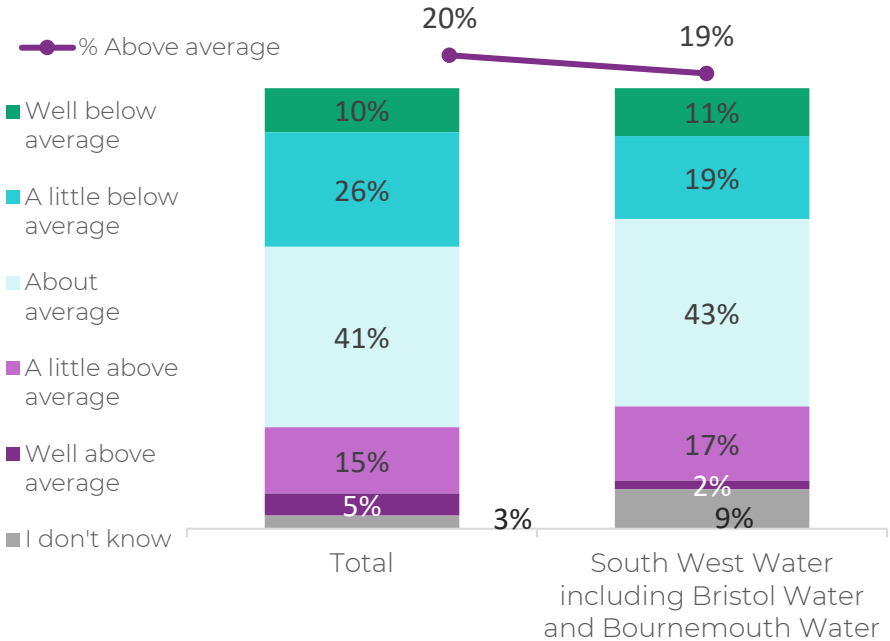


The voice for water consumers
Llais defnyddwyr dŵr

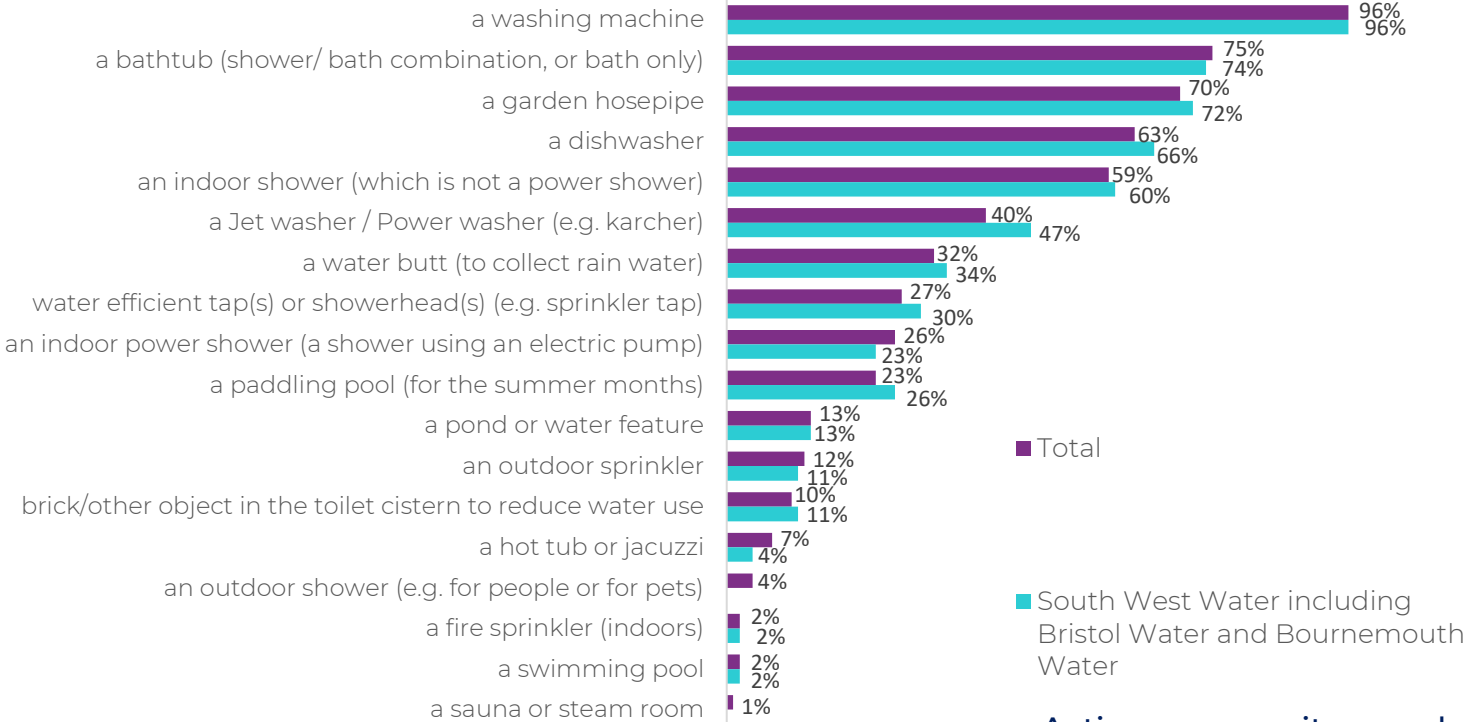
43% of South West Water, Bristol Water and Bournemouth Water community members say they consume an average amount of water. Compared to the norm, a lower number indicated consumption that is above or below average.

South West Water, Bristol Water and Bournemouth Water are more likely to have a jet washer / power washer, a garden hosepipe and a paddling pool compared to the norm. They are also slightly more likely than the norm to have a dishwasher and water efficient tap(s) or shower head(s).

In a typical week, how much water would you say your household uses vs a similar household?



Which, if any of the following do you, or anyone who lives with you, use/have at home?
– Select all that apply



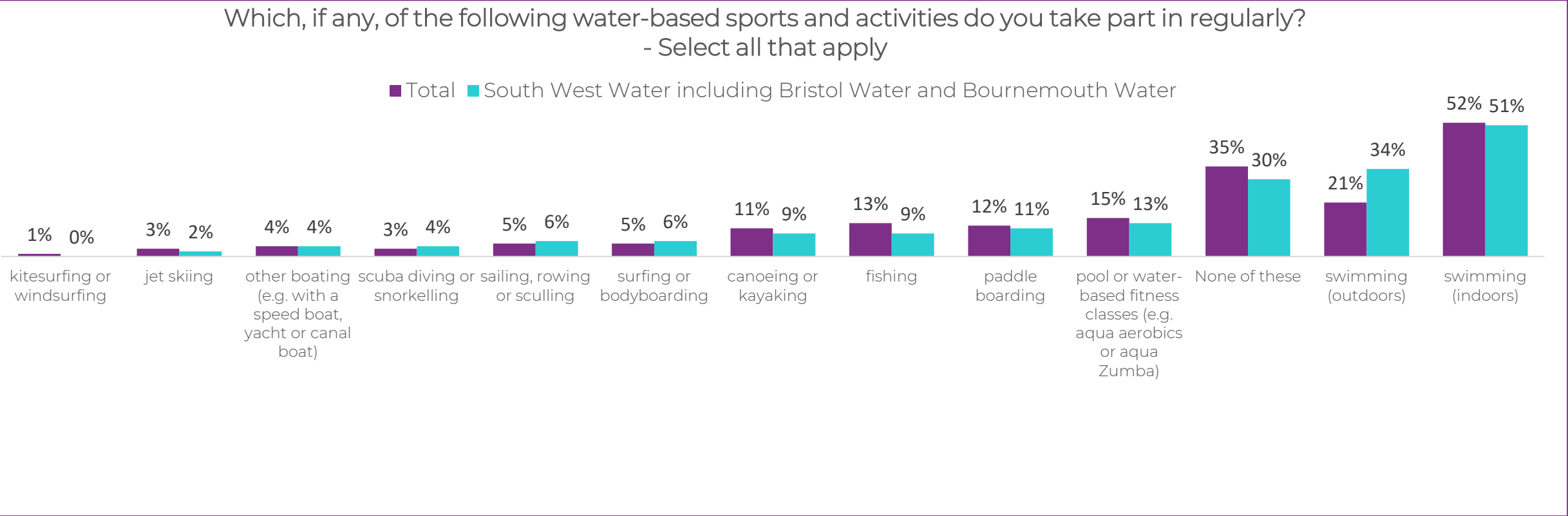
Active community members
Total Base Size: 755

South West, Bristol & Bournemouth Water Base Size: 47

Water Locations & Activities



Swimming (indoors) is by far the most common water-based activity for South West Water, Bristol Water and Bournemouth Water community members. The second most common activity is swimming (outdoor), selected by 34% of community members (higher than the norm).

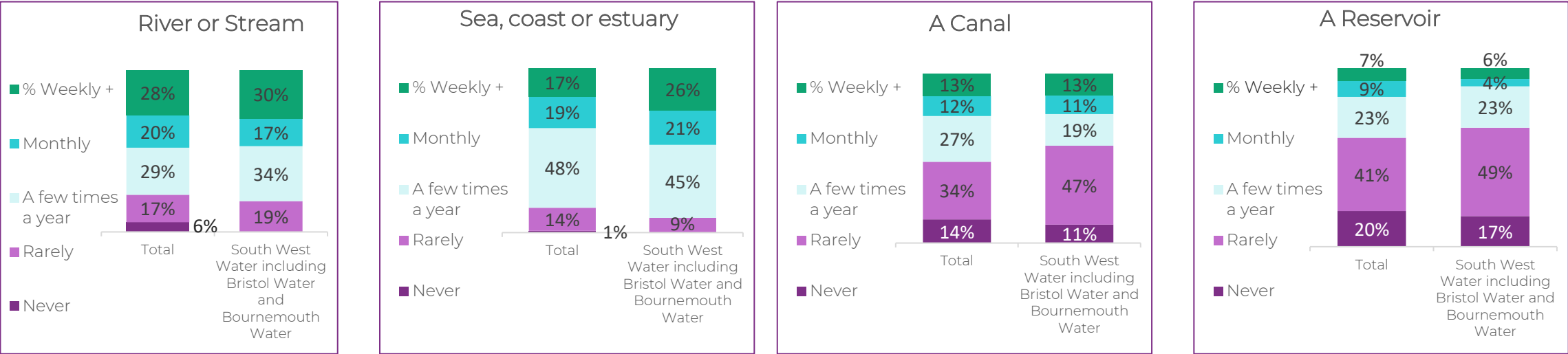


Water Locations & Activities



South West Water, Bristol Water and Bournemouth Water community members are less likely than the norm to visit canals or reservoirs. They are also more likely to visit the sea, coast or estuary at least monthly.

How often, if at all, do you spend time by or on the water at any of these places shown below?

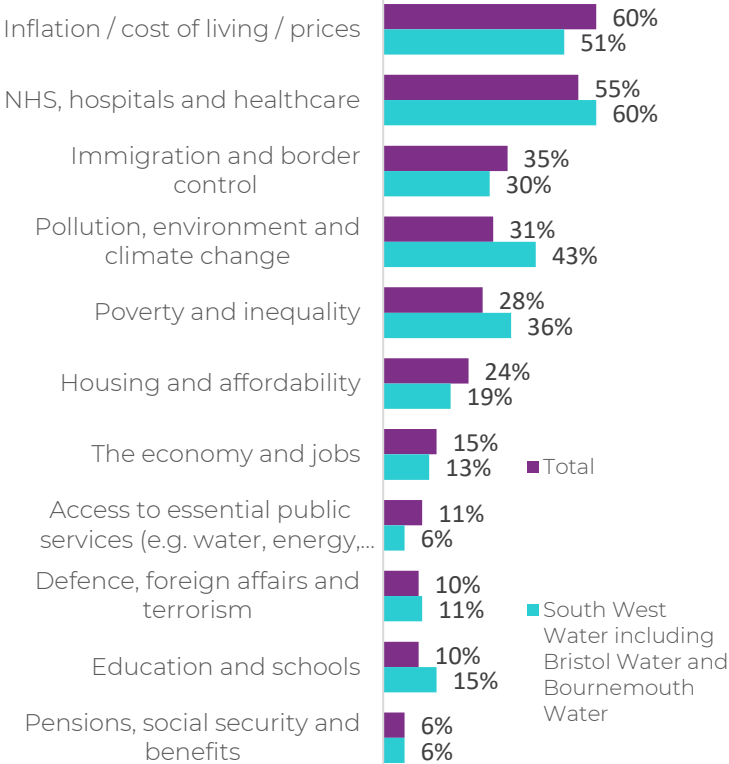


UK Issues

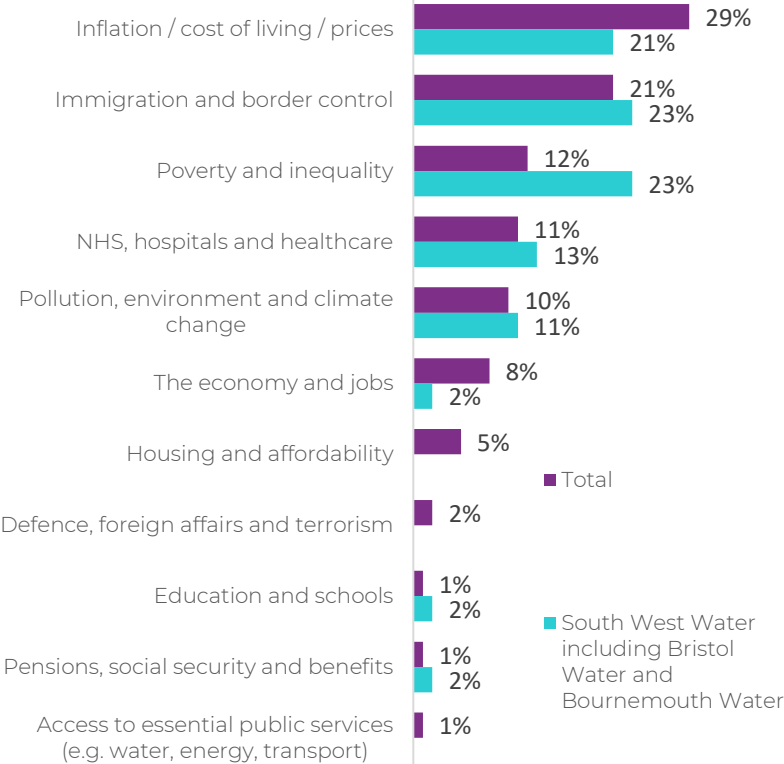


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All Issues Facing the UK - Select up to two



ONE Main issue Facing the UK



South West Water, Bristol Water and Bournemouth Water community members have told us their single biggest issues facing the UK. These are split equally between:

- Immigration and border control
- Poverty and inequality

This is by a higher number than the norm.

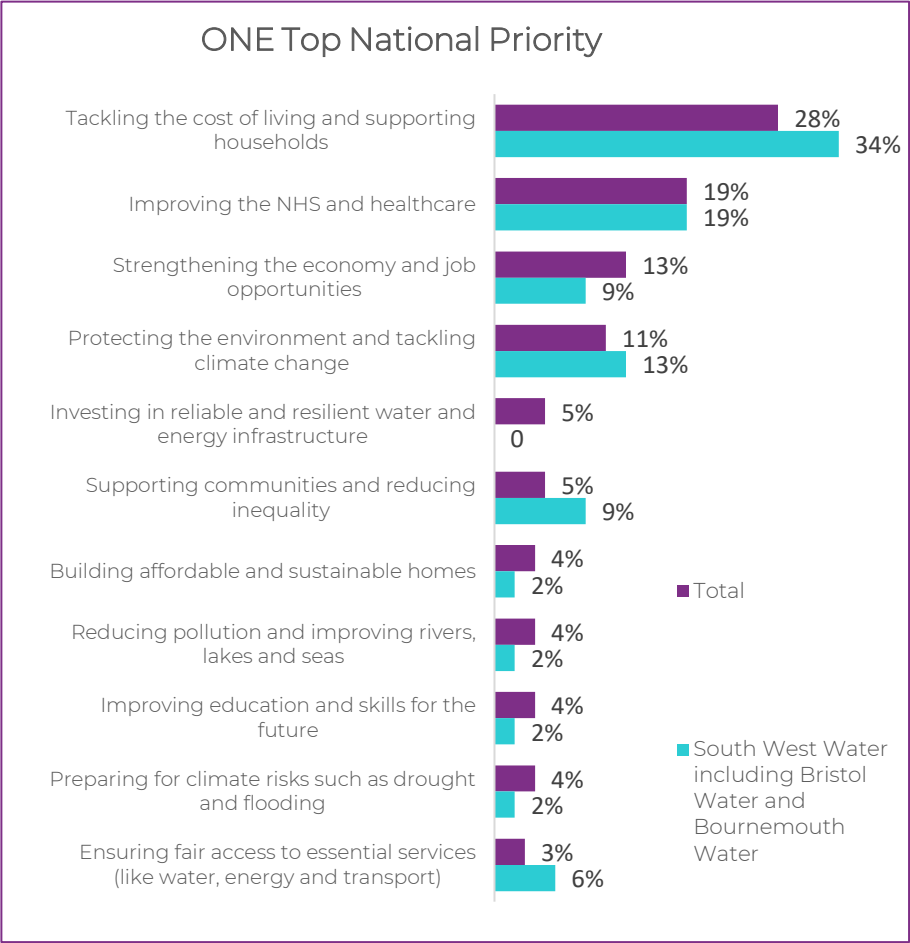
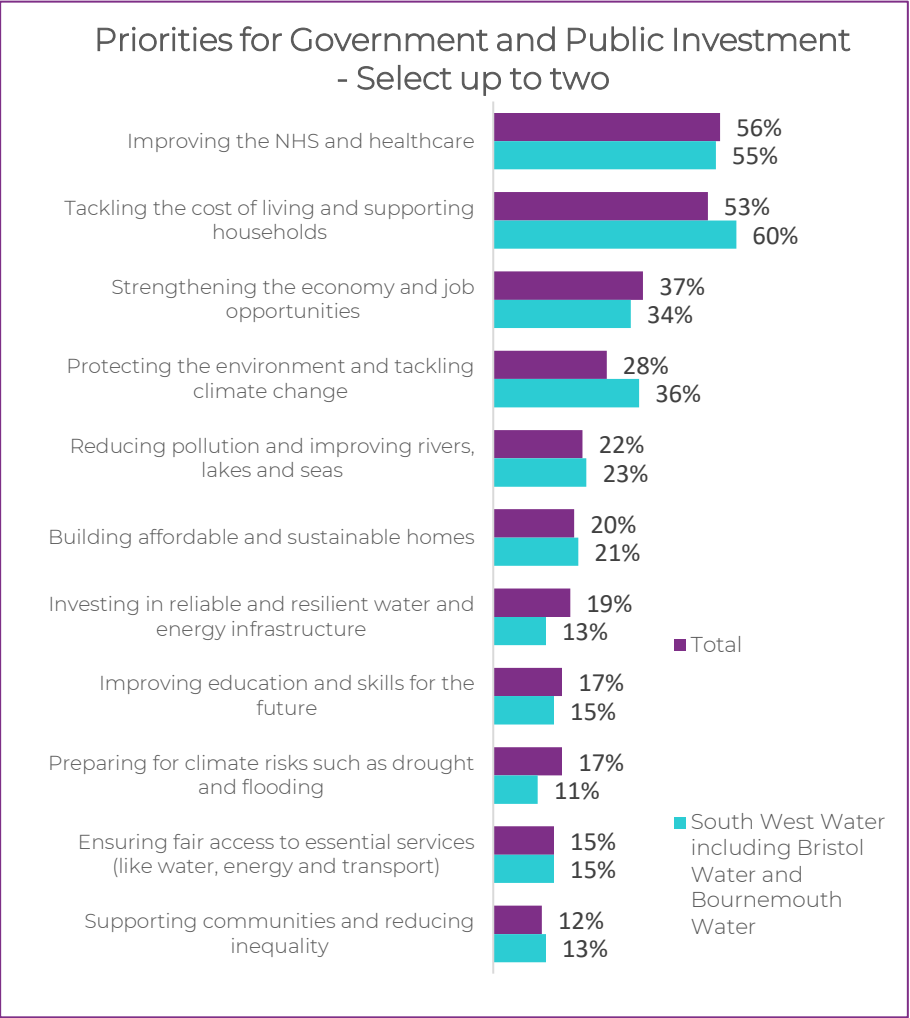
Inflation / cost of living / prices ranks next for these community members, though they are less likely than the norm to name it as their single biggest issue facing the UK.

UK Priorities



South West Water, Bristol Water and Bournemouth Water community members rank tackling the cost of living and supporting households as the top priority. This is by a higher number than the norm. The second top priority is improving the NHS and healthcare.

South West Water, Bristol Water and Bournemouth Water community members are also more likely than the norm to see protecting the environment and tackling climate change as priorities for the future.



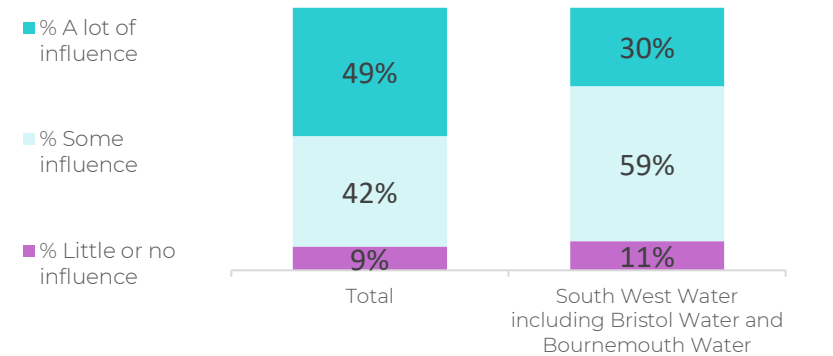
Environment Concerns

Including saving water & energy

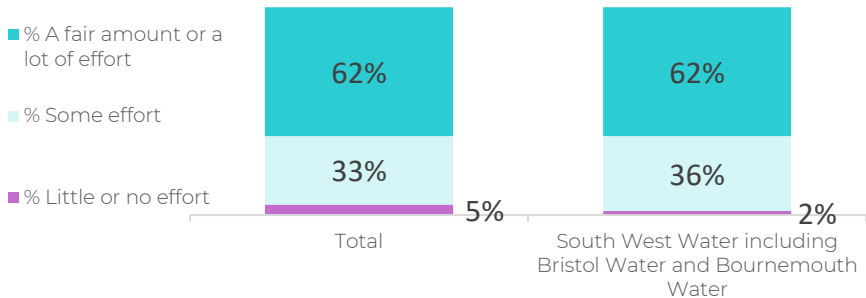


South West Water, Bristol Water and Bournemouth Water community members are less likely to say that concern for the environment has a lot of influence on their everyday decisions compared to the norm.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

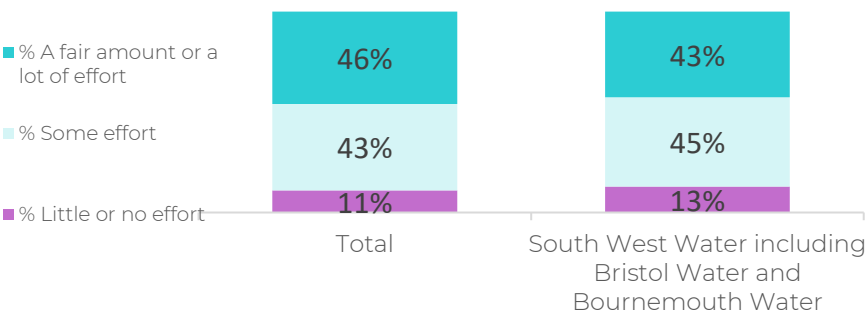


How much effort does your household make at home to save ENERGY?



62% of South West Water, Bristol Water and Bournemouth Water community members (on a par with the norm) say they make a fair amount or a lot of effort to save energy.

How much effort does your household make at home to save WATER?



South West Water, Bristol Water and Bournemouth Water community members are slightly less likely to say they make a fair amount or a lot of effort to save water compared to the norm.

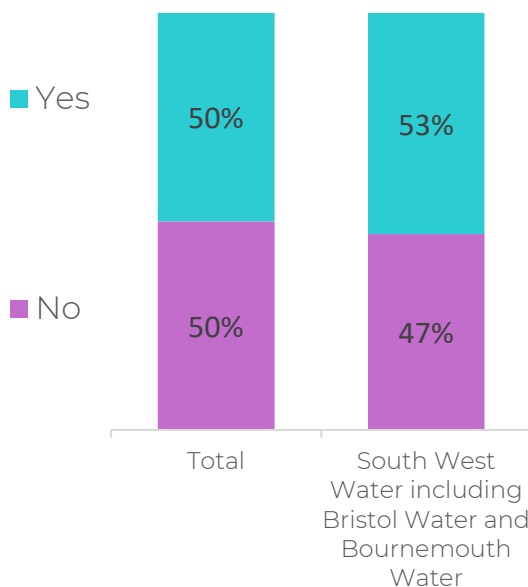
Priority Services Register



The voice for water consumers
Llais defnyddwyr dŵr

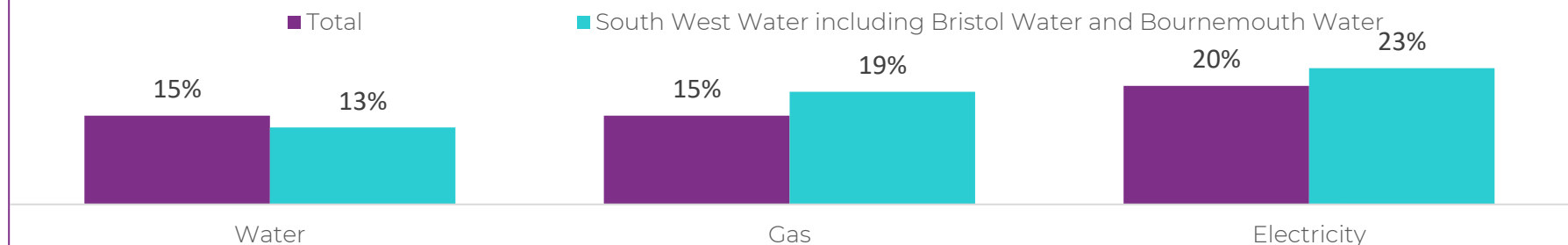
Overall, 53% of South West Water, Bristol Water and Bournemouth Water community members say they have heard of the Priority Services Register.

Before today, had you heard about the Priority Services Register?

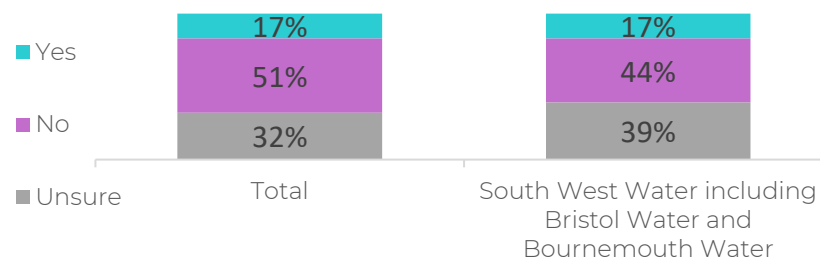


A higher proportion of South West Water, Bristol Water and Bournemouth Water community members say they are on the Priority Services Register for electricity than for gas or water. They are less likely to be on the water register compared to the norm.

Are you on the Priority Services Register (PSR) for any of the following? Select all that apply
- % Yes



Do you think you should be on the Priority Services Register for water?



For those not currently on the Priority Services Register for water, 17% of South West Water, Bristol Water and Bournemouth Water community members think they should be on it.

Water Meters

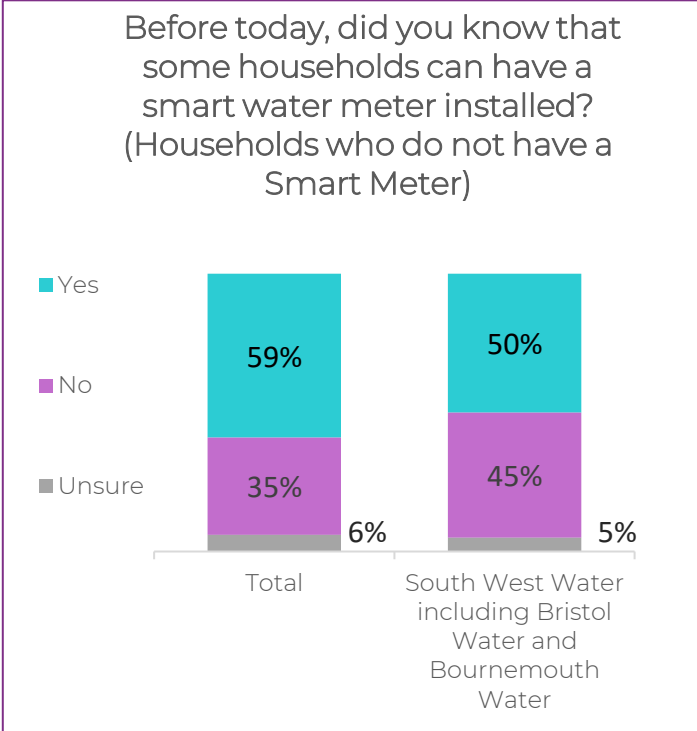
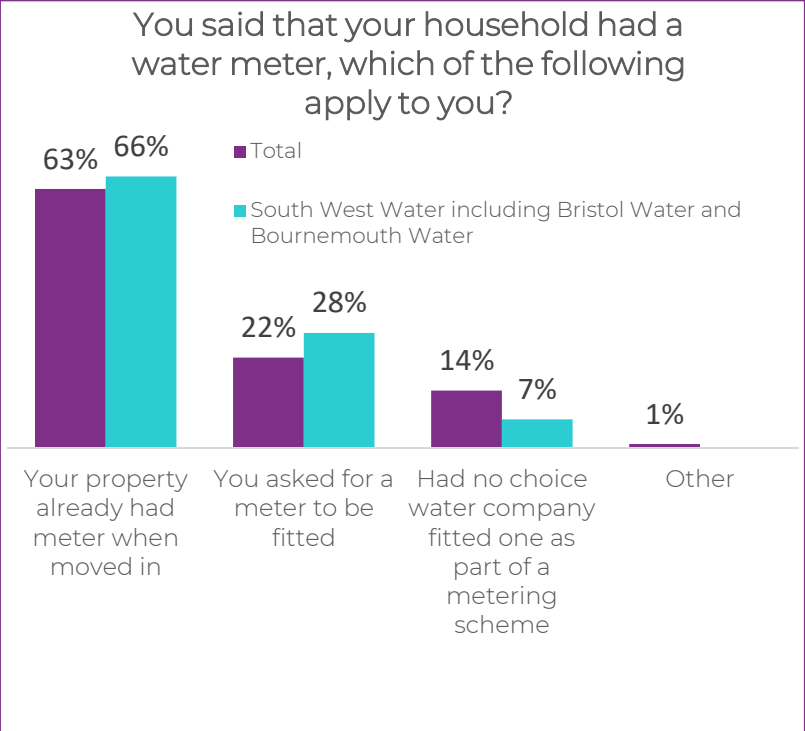
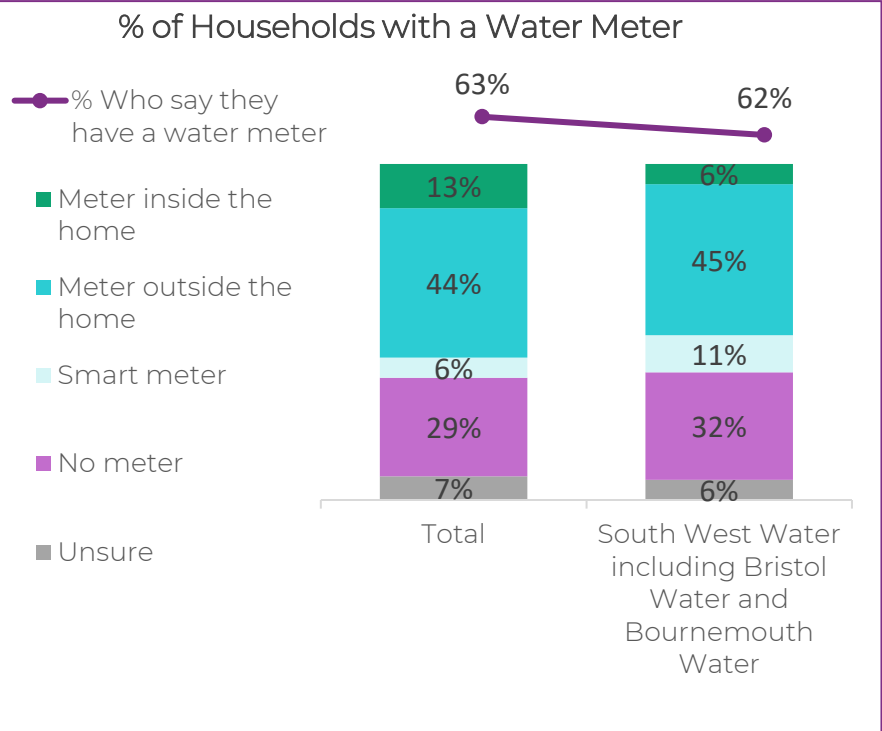


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South West Water, Bristol Water and Bournemouth Water community members are marginally less likely than the norm to have a water meter. Compared to the norm, they are less likely to have a meter inside the home, but more likely to have a smart meter.

For South West Water, Bristol Water and Bournemouth Water community members who have a water meter, 66% already had a meter when they moved in and 28% asked for it to be fitted (both higher the norm).

50% of South West Water, Bristol Water and Bournemouth Water community members say they know that households can have a smart water meter installed. This is below the norm.

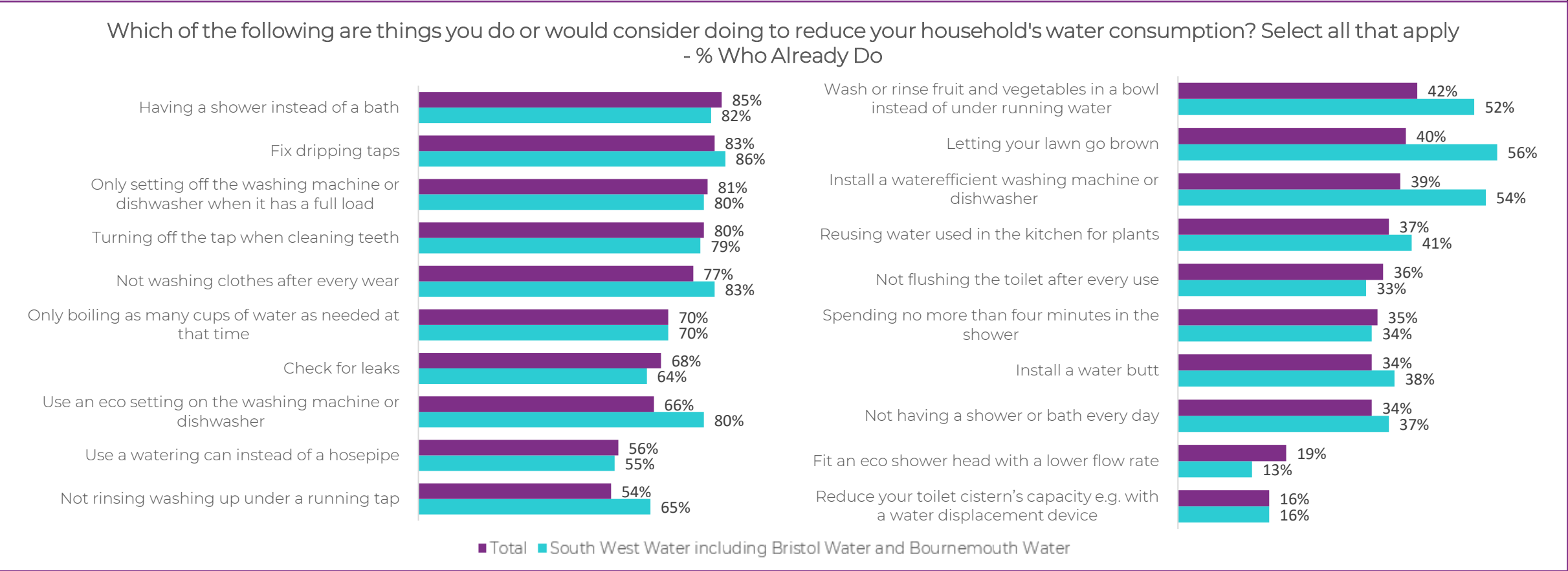


Water-Saving Measures



The voice for water consumers
Llais defnyddwyr dŵr

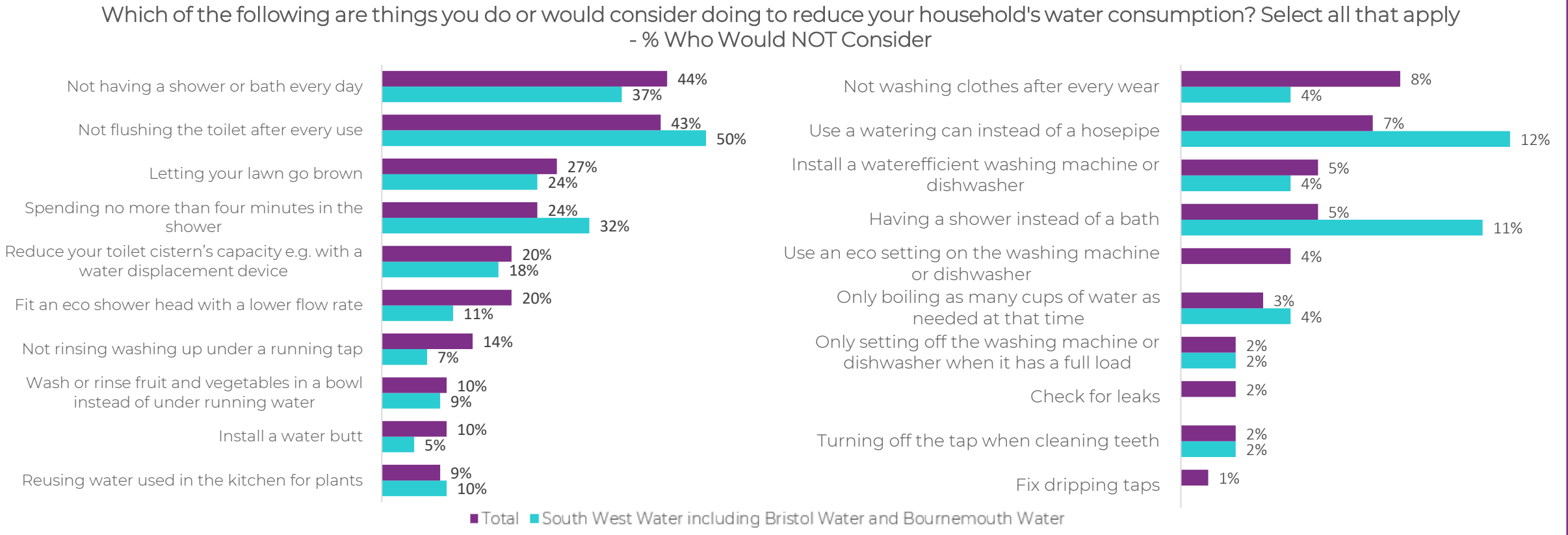
The majority of South West Water, Bristol Water and Bournemouth Water community members (and a higher number compared to the norm) say they are already fixing dripping taps, not washing clothes after every wear, and using an eco setting on their washing machine or dishwasher.



Water-Saving Measures



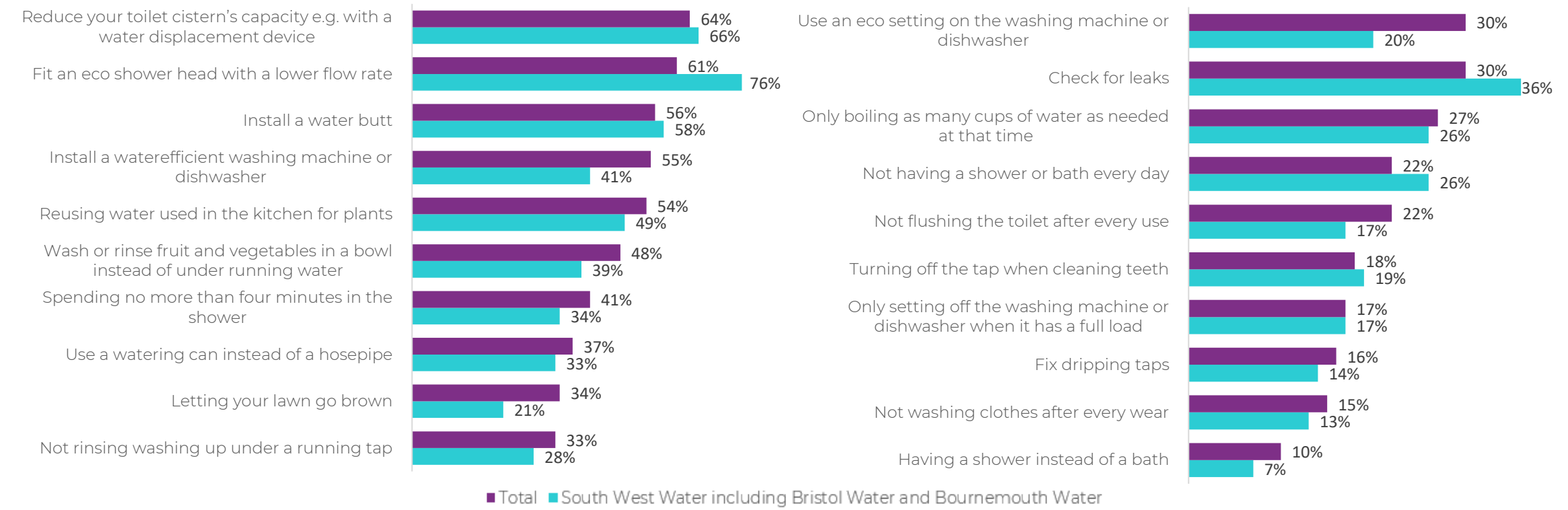
For South West Water, Bristol Water and Bournemouth Water community members, the water-saving measure generating the greatest resistance is not flushing the toilet after every use (higher than the norm). This is followed by not having a shower every day and spending no more than four minutes in the shower.



Water-Saving Measures

For South West Water, Bristol Water and Bournemouth Water community members, the highest levels of openness are to fitting an eco shower head with a lower flow rate, reducing the toilet cistern’s capacity, and installing a water butt.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who WOULD Consider



Disruptions & Issues

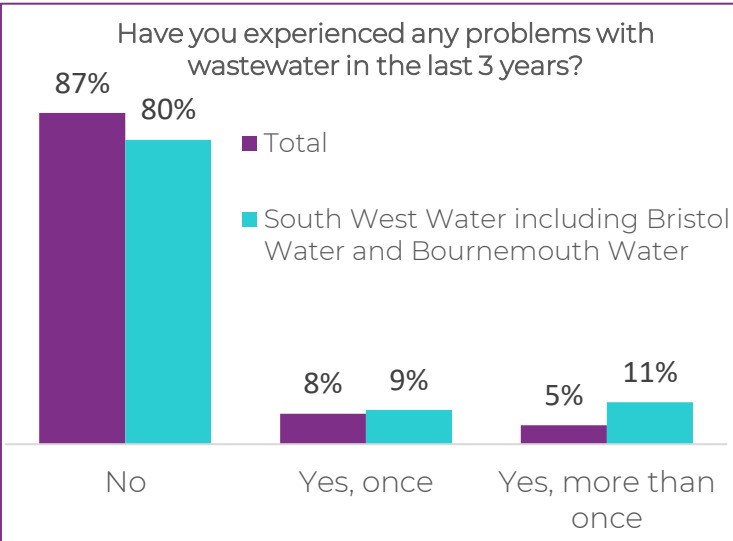
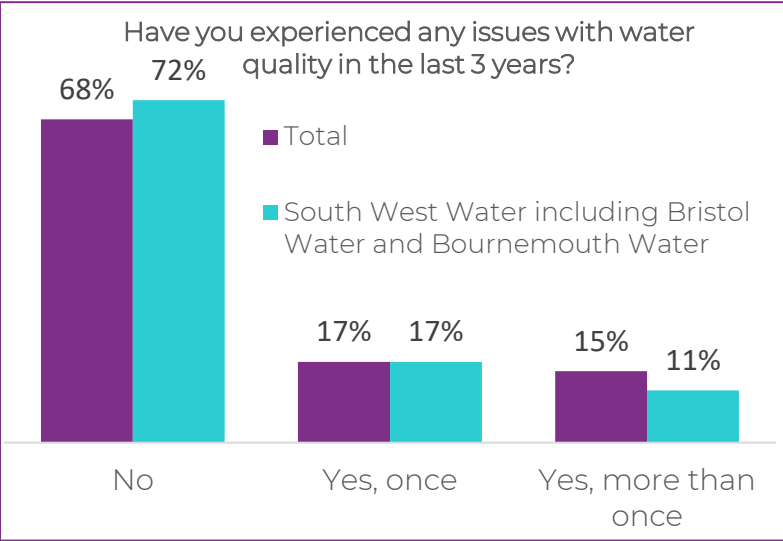
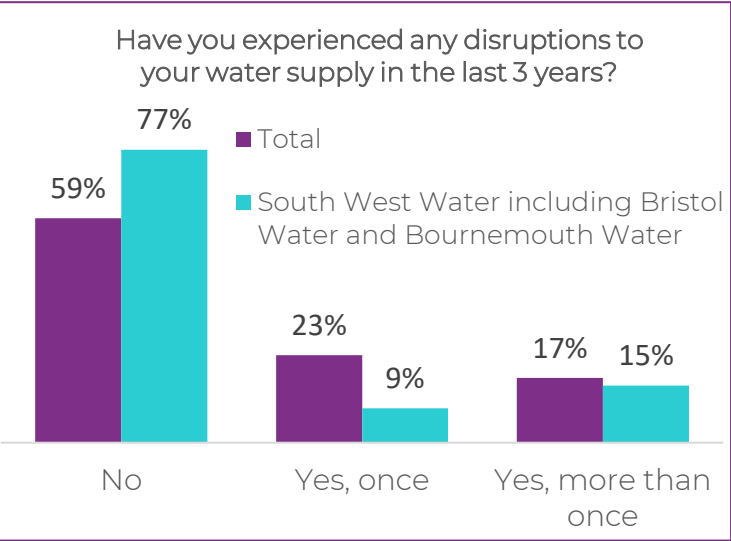


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77% of South West Water, Bristol Water and Bournemouth Water community members say they have not experienced supply disruptions in the last 3 years (higher than the norm). 9% have had one disruption (lower than the norm) and 15% have had a disruption more than once.

72% of South West Water, Bristol Water and Bournemouth Water community members say they have had no issues with water quality in the last 3 years, slightly higher than the norm. 11% have had more than one issue (slightly lower than the norm) and 17% have had one issue.

80% of South West Water, Bristol Water and Bournemouth Water community members say they have had no problems in the last 3 years with wastewater (slightly lower than the norm). 11% had an issue more than once (slightly higher than the norm) and 9% have once had an issue.



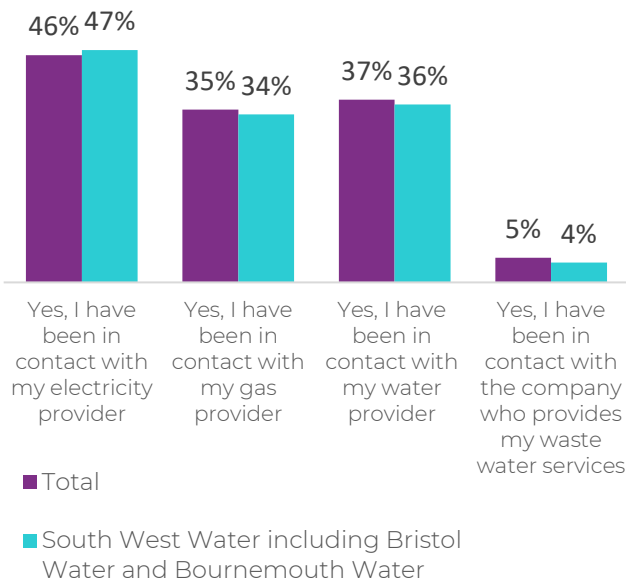
Contact with utility providers



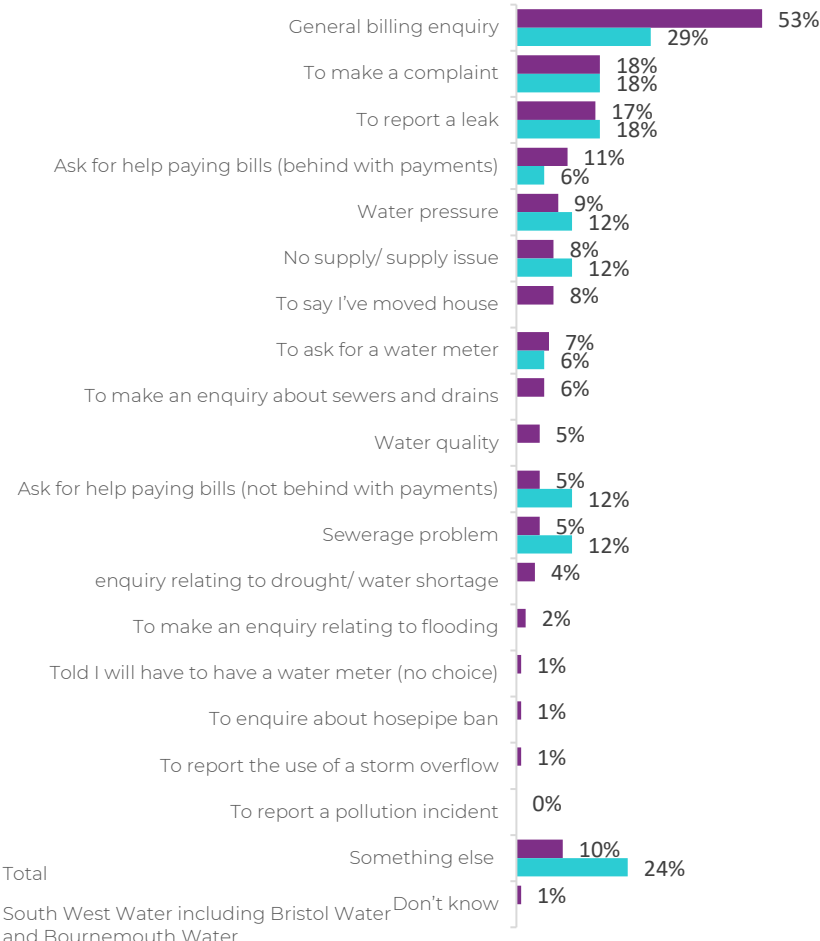
The voice for water consumers
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36% of community members have been in contact with South West Water, Bristol Water and Bournemouth Water in the last 12 months. This is in line with the norm.

Have you contacted any of your utility providers in the last 12 months? Select all that apply



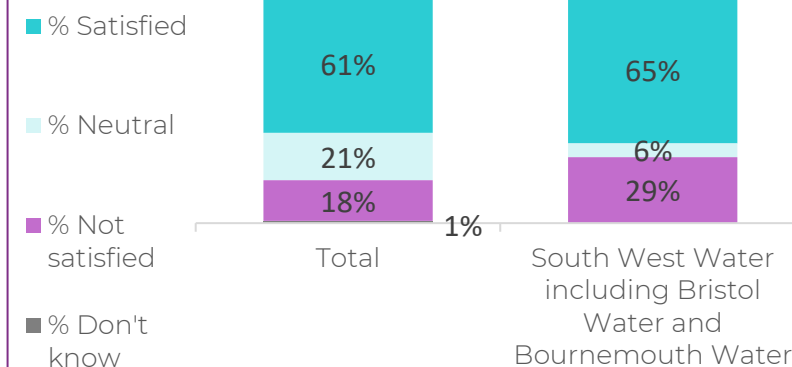
Water provider: What was the nature of this contact?
- Select all that apply



Billing enquiries are the main reason for contacting South West Water, Bristol Water and Bournemouth Water, however this is lower than the norm. This is followed by making a complaint, and to report a leak, which are both in line with the norm.

65% of South West Water, Bristol Water and Bournemouth Water community members who made contact were satisfied with that contact. This is slightly higher than the norm.

Satisfaction with Contact with Water community members



Active community members

Total Base Size: 755

South West, Bristol & Bournemouth Water Base Size: 47

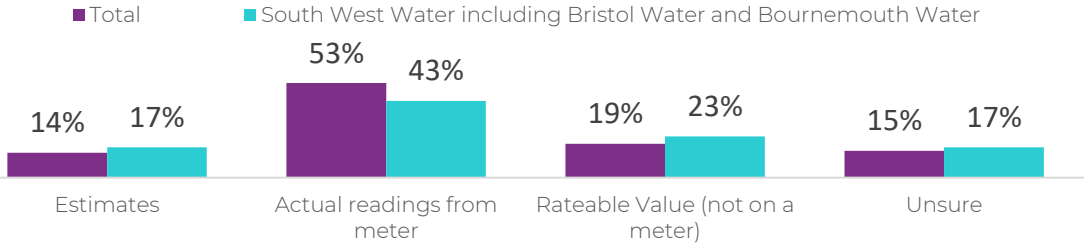
Billing



The voice for water consumers
Llais defnyddwyr dŵr

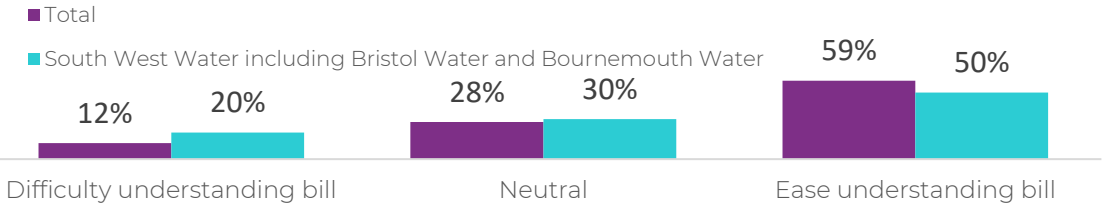
South West, Bristol & Bournemouth Water community members are more likely than the norm to have their water bills based on estimates and rateable value charges.

Are the bills you receive from your water company estimates or from actual readings?



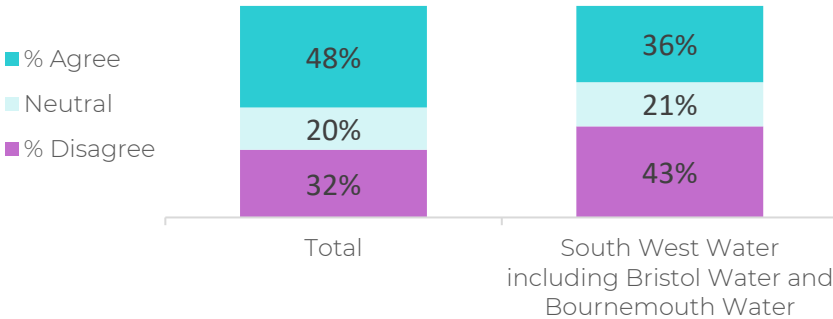
50% of South West, Bristol & Bournemouth Water community members say they find it easy to understand their water bills (slightly below the norm)

How easy or difficult to understand are the water bills you receive?



How much do you agree or disagree with the following statements?

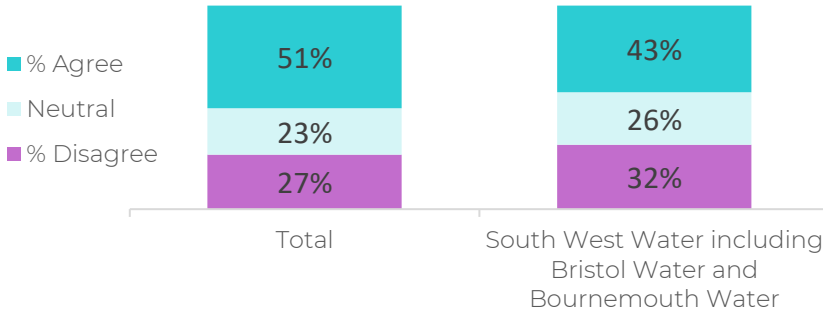
I fully understand how my water bill is calculated



36% of South West, Bristol & Bournemouth Water community members feel they understand how their water bill is calculated. This is below the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



South West, Bristol & Bournemouth Water community members are slightly more likely than the norm to disagree that water bills are affordable.

Active community members
Total Base Size: 755

South West, Bristol & Bournemouth Water Base Size: 47



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Southern Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

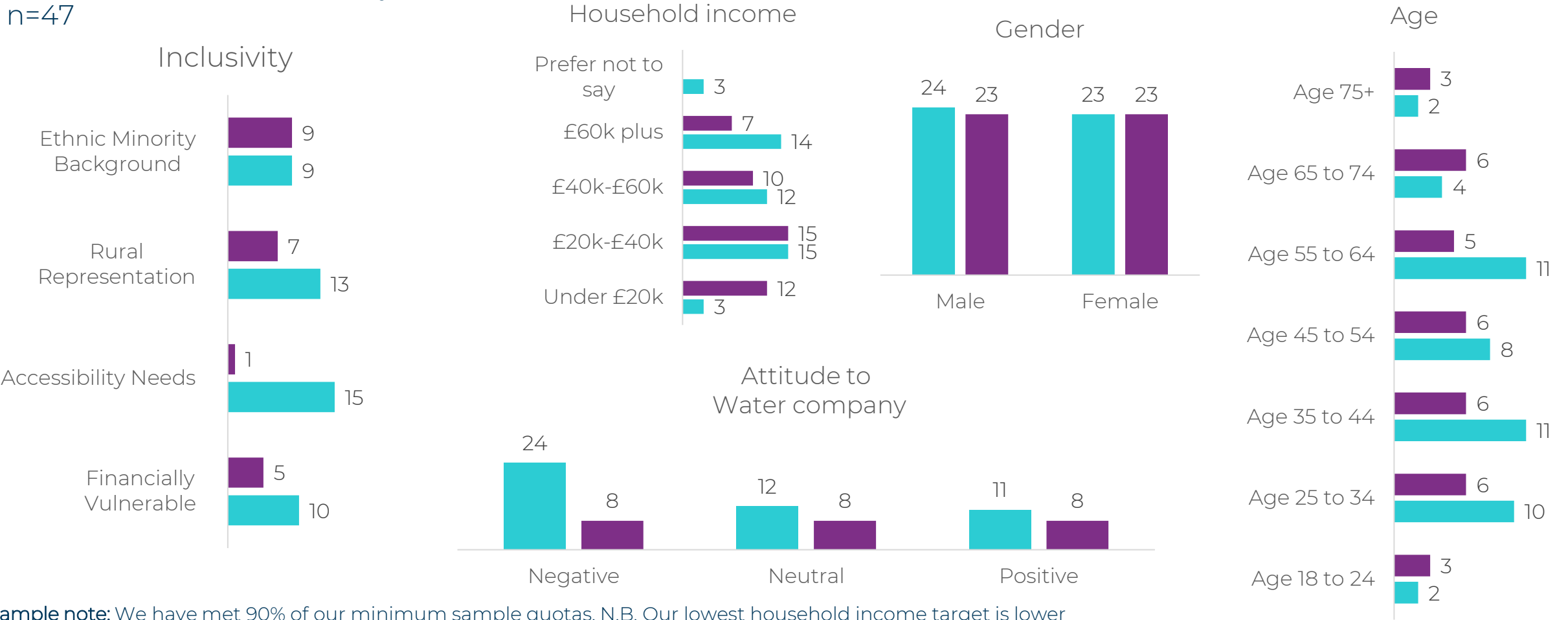
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Southern Water

Community population



Southern Water community members:
n=47



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 our financially vulnerable community members by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. 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

Southern Water

What do Southern Water community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Being heard & influencing change:** ensure community members' views influence decisions and encourage improvements.
- **Improve service quality, reliability and customer experience:** tangible improvements to the services Southern Water provides (e.g., cleaner water supply and improved infrastructure).
- **Accountability & transparency:** a greater openness and responsibility from water companies and building trust.
- **Environmental protection & water conservation:** improve waterways and reduce pollution. Better, more efficient management.
- **Building a collaborative relationship:** bridge the gap between water companies and community members, helping to shape better services and policies.



What Southern Water community members have said...

"I would hope that water suppliers would get to know us, their customers, better, and vice versa, so that water supply in general can be improved upon." Male, 35, Lives alone

"Better communications and actions from water companies. Reduce leaks, storm and sewage overflows, their actions focus on things I think are top priorities." Male, 63, Lives with partner

"I would like to think the panel will give voice to consumer concerns and be a conduit for information in both directions." Male, 58, Lives with partner

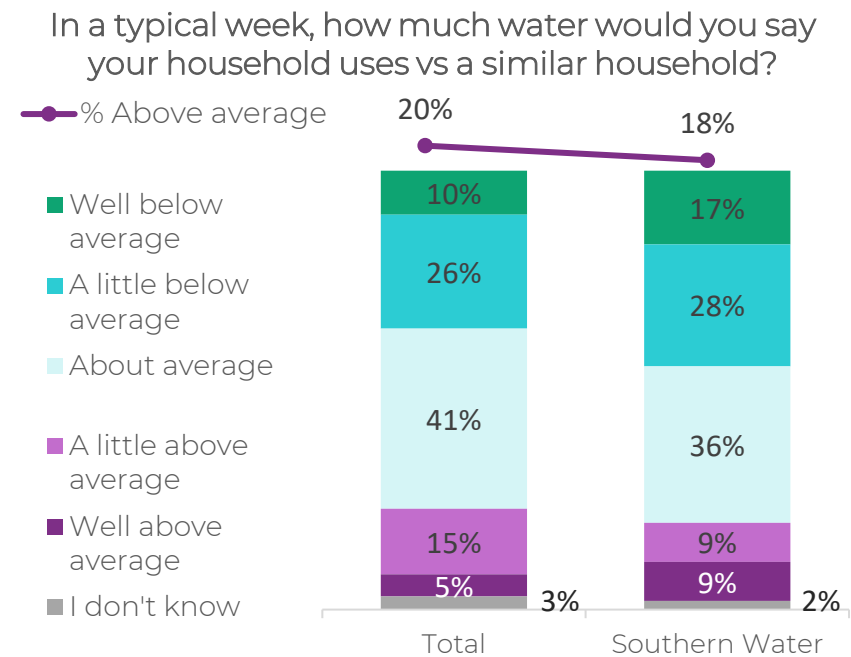


Southern Water community members want to ensure their voices lead to real change. Through improving service quality, transparency, environmental performance, and ethical standards. They expect stronger communication, genuine accountability, and customer-driven solutions that protect both communities and the environment.

Active community members
Total Base Size: 755
Southern Water Base Size: 47

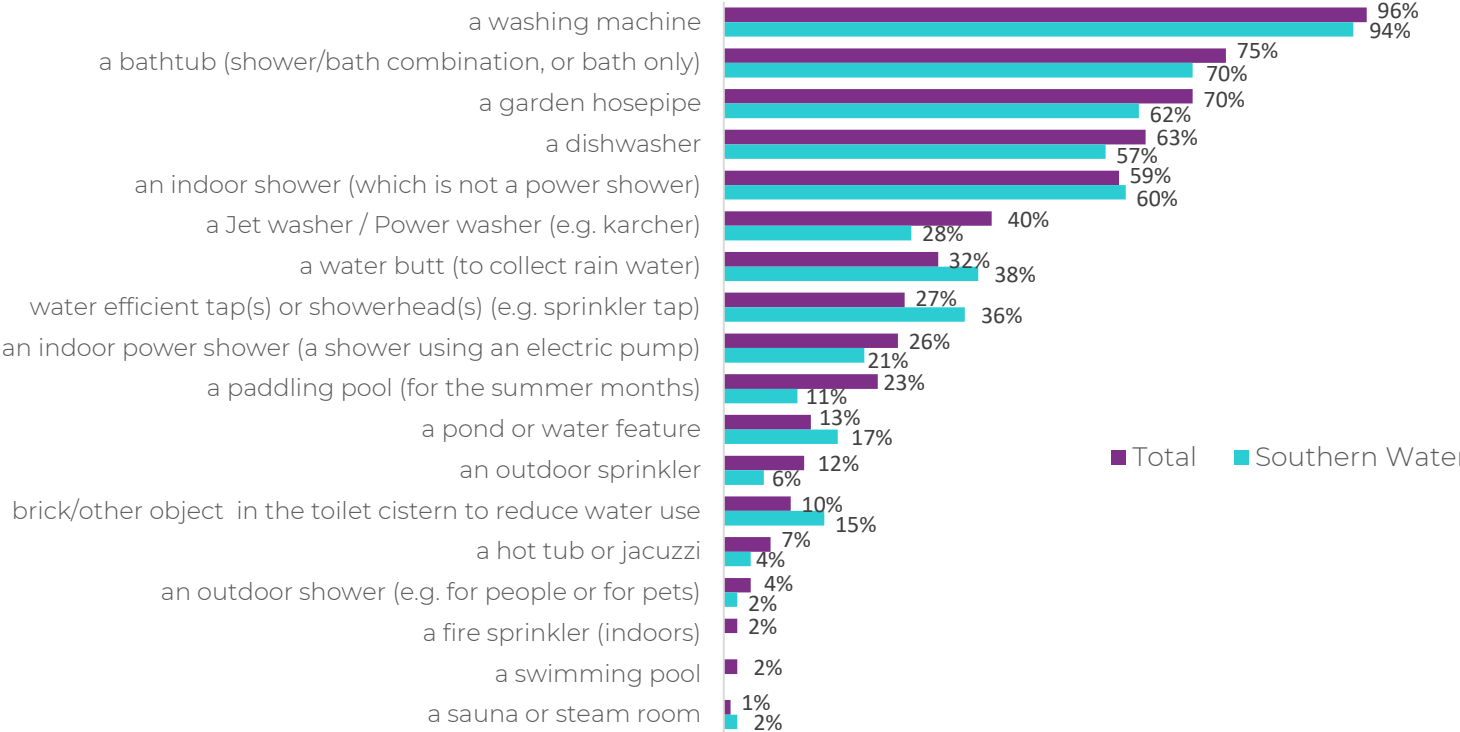
Water Use at Home

Southern Water community members are more likely to say that their water consumption is “below average” compared to the norm. A slightly lower number than the norm say their water consumption is “about average” or “above average”.



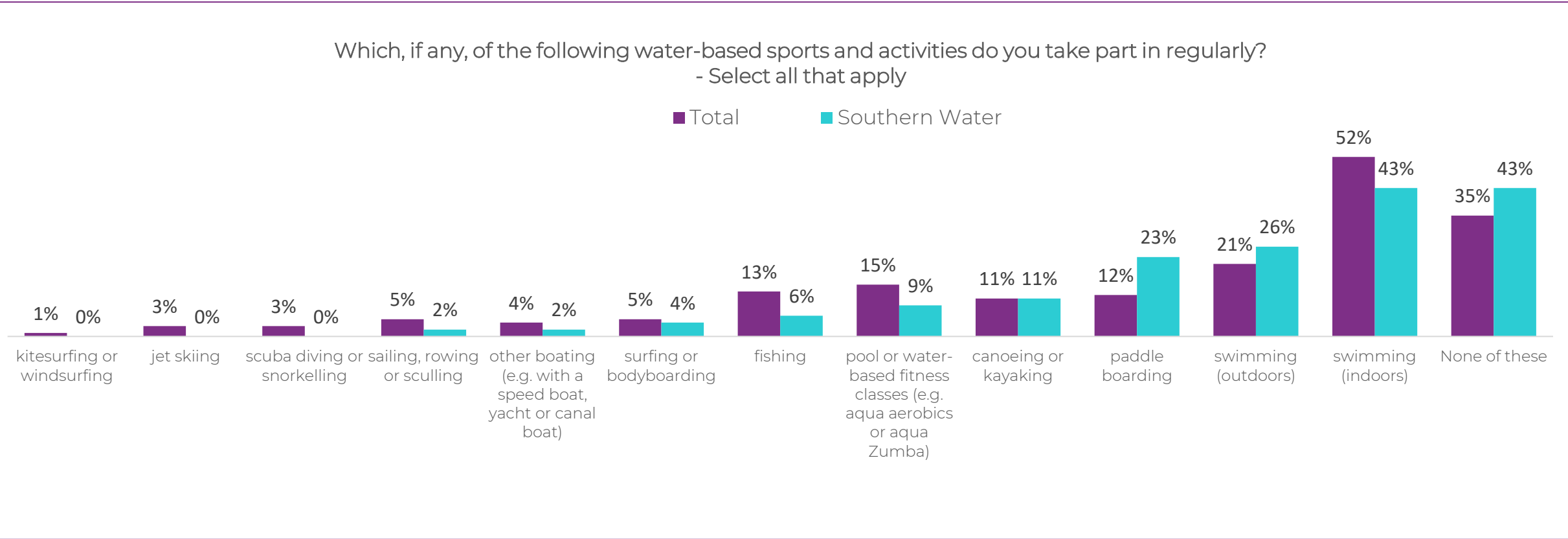
Southern Water community members are more likely than the norm to have a water butt, water efficient tap(s) or shower head(s), and a pond or water feature. They are more likely to have a brick or other object used in the toilet cistern.

Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Water Locations & Activities

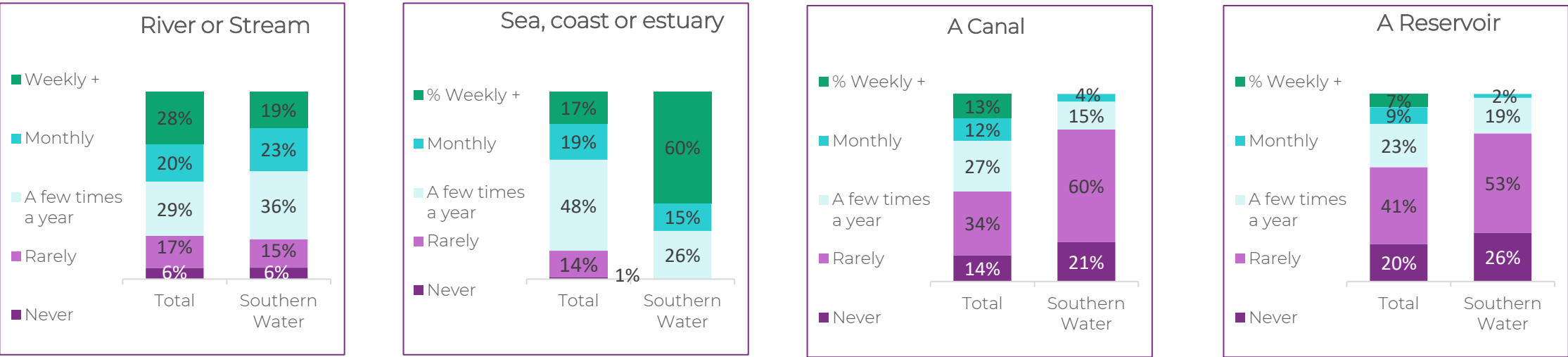
When asked about water-based activities, taking part in none was the most common response for Southern Water community members at par with swimming (indoors). This is followed by swimming (outdoors) and paddle boarding.



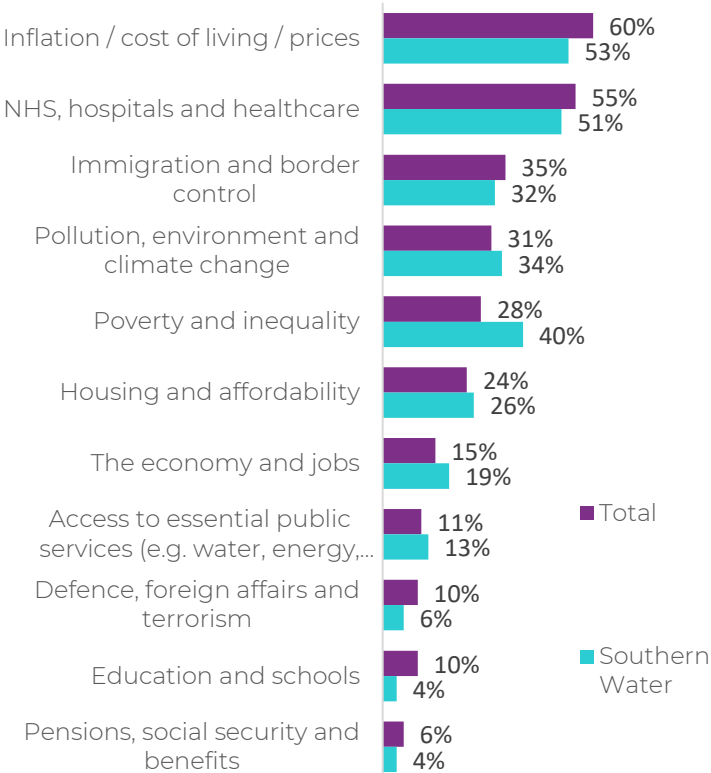
Water Locations & Activities

Southern Water community members are less likely than the norm to visit canals or reservoirs. They are considerably more likely to visit the sea, coast or estuary weekly compared to the norm.

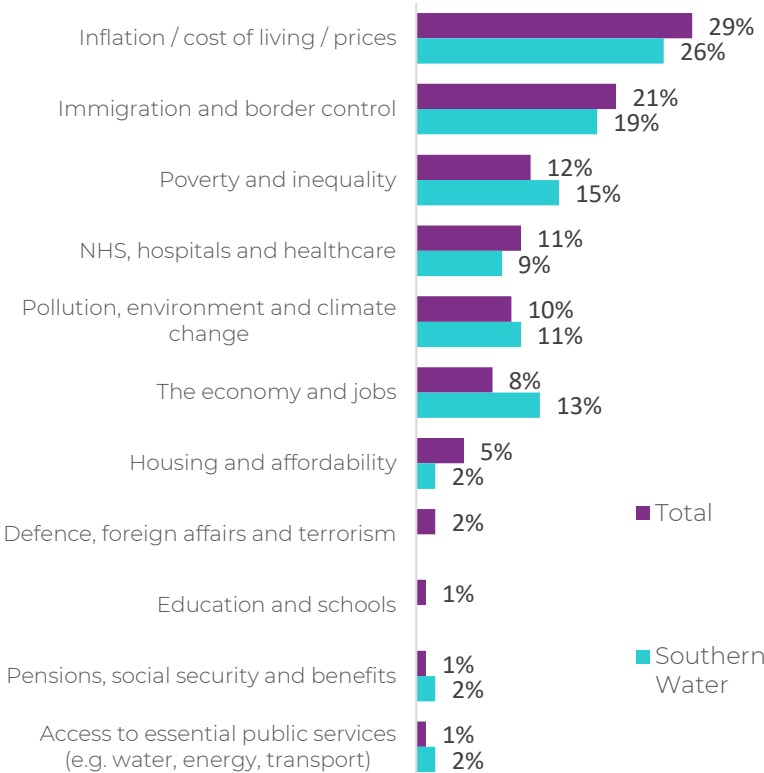
How often, if at all, do you spend time by or on the water at any of these places shown below?



All Issues Facing the UK



One Main issue Facing the UK



Southern Water community members have told us their top issue is:

- Inflation / cost of living / prices

This is by a slightly lower number than the norm.

Immigration and border control ranks as the second single biggest issue facing the UK. However, this is by a slightly lower number compared to the norm.

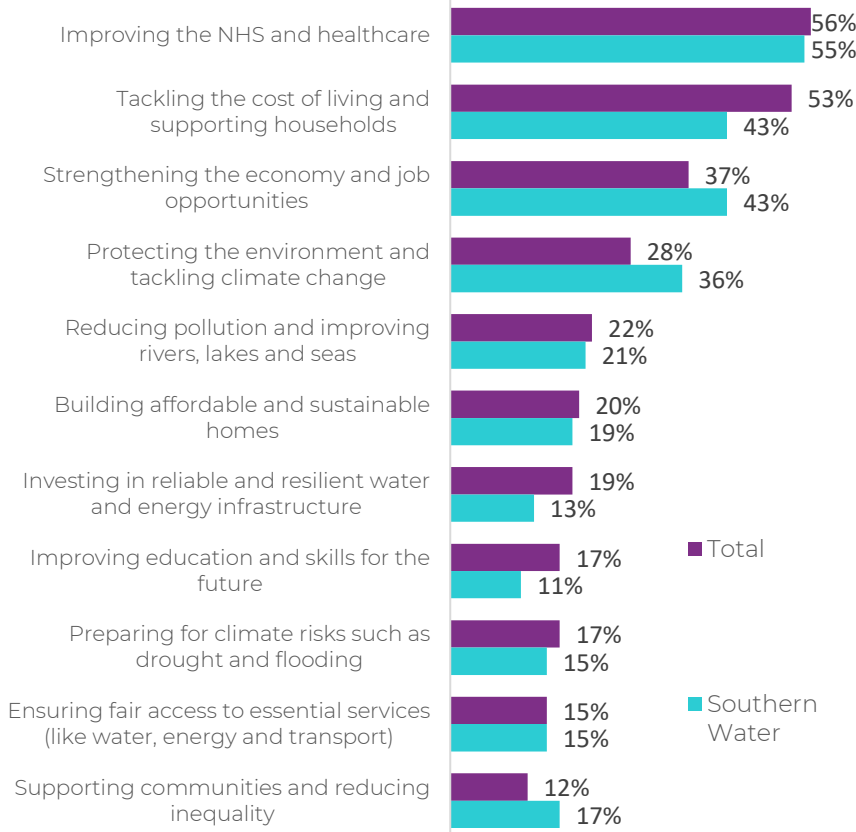
The economy and jobs ranks as the fourth single biggest issue facing the UK (above the norm).

UK Priorities

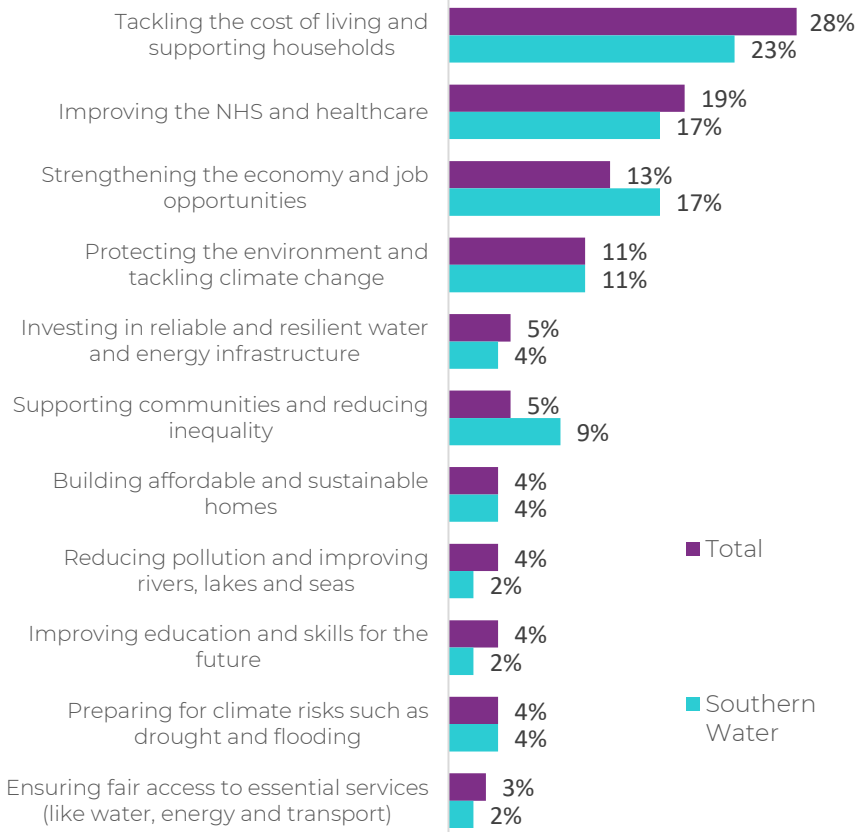
Southern Water community members rank tackling the cost of living and supporting households as the top priority, although this is below the norm. Improving the NHS and healthcare and strengthening the economy and job opportunity both rank second as top priorities.

Southern Water community members are also more likely than the norm to see supporting communities and reducing inequality as a priority for the future.

Priorities for Government and Public Investment- Select up to two



ONE Top National Priority

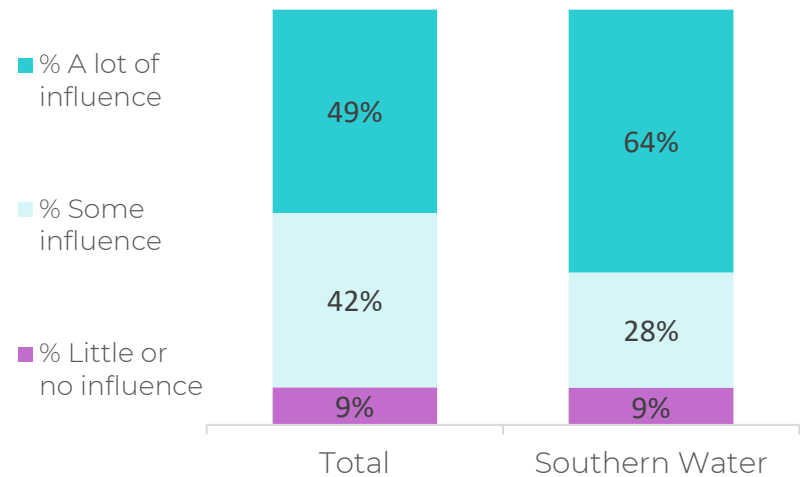


Environment Concerns

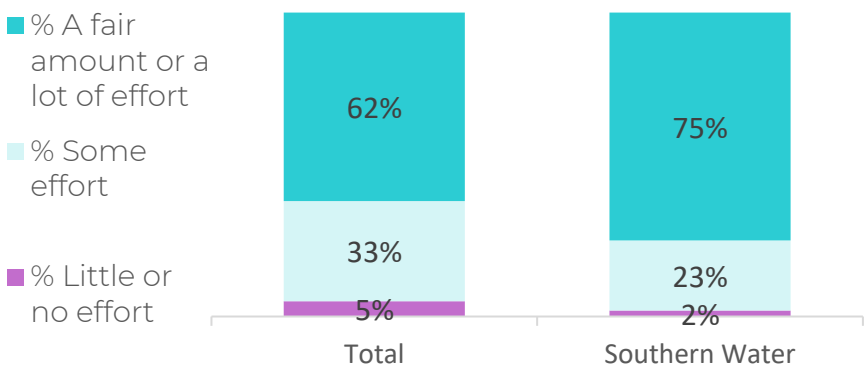
Including Saving Water & Energy

Southern Water community members are more likely to say that concern for the environment has a lot of influence on their everyday decisions compared to the norm.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

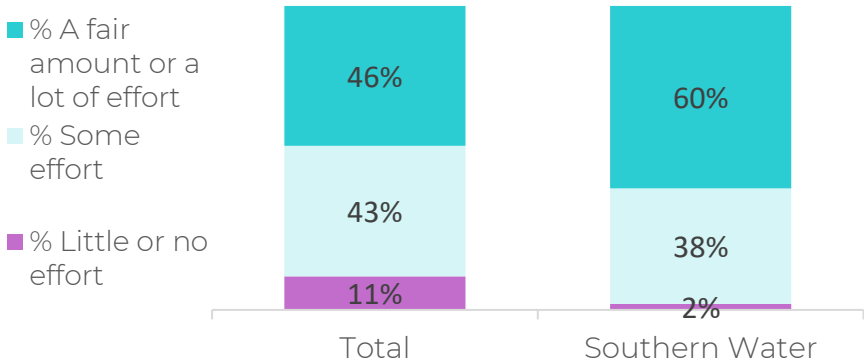


How much effort does your household make at home to save ENERGY?



75% of Southern Water community members say they make a fair amount or a lot of effort to save energy. This is higher than the norm.

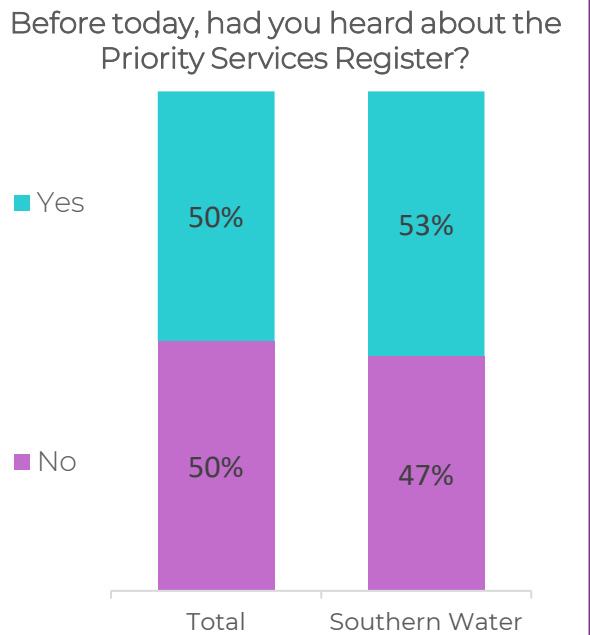
How much effort does your household make at home to save WATER?



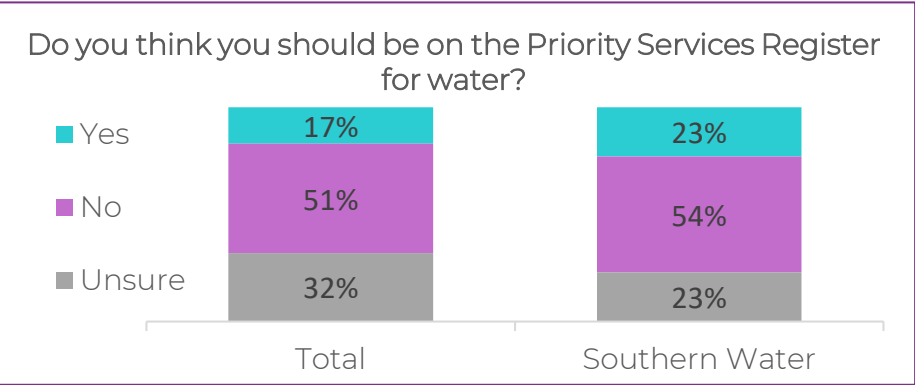
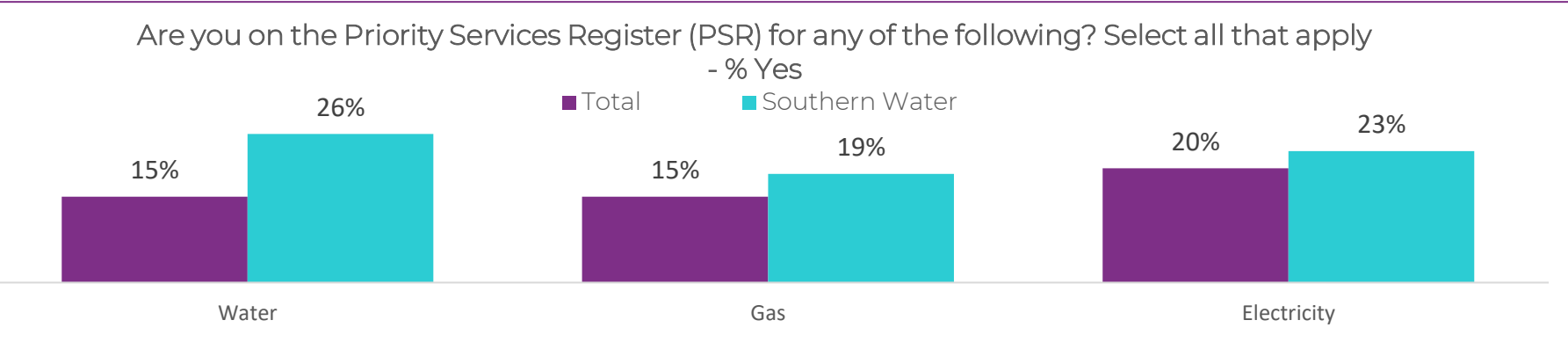
Southern Water community members are more likely to say they make a fair amount or a lot of effort to save water compared to the norm.

Priority Services Register

Overall, 53% of Southern Water community members say they have heard of the Priority Services Register.



A higher proportion of Southern Water community members say they are on the Priority Services Register for water than for gas or electricity and they are more likely to be on the registers compared to the norm.



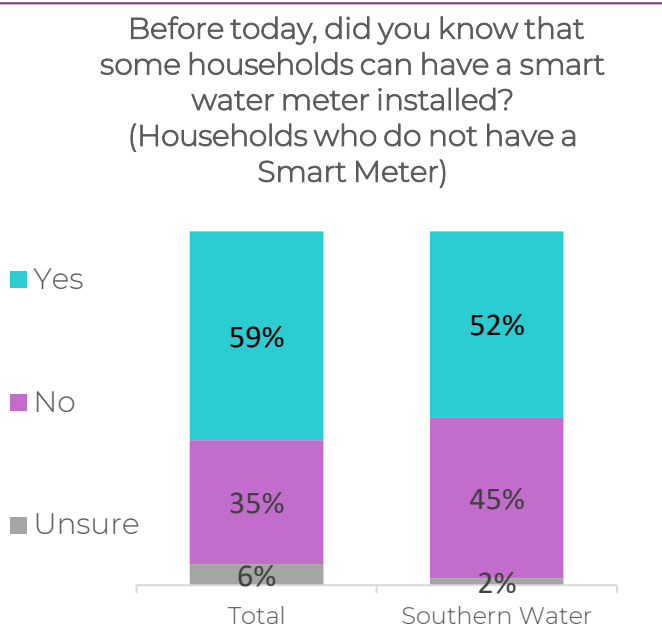
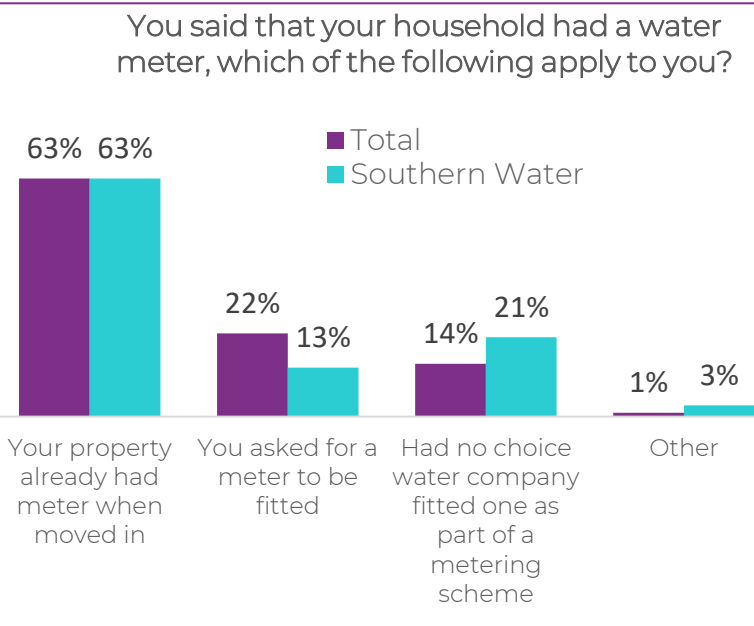
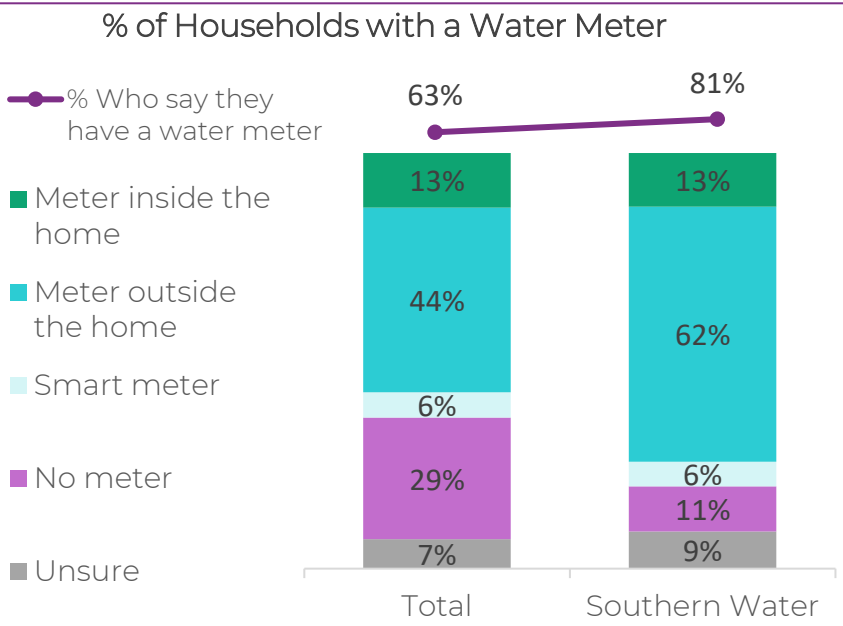
For those not currently on the Priority Services Register for water, 23% of Southern Water community members think they should be on it.

Water Meters

Southern Water community members are more likely than the norm to have a water meter. They are particularly more likely to have a meter outside the home, while rates of meters inside the home and smart meters are in line with the norm.

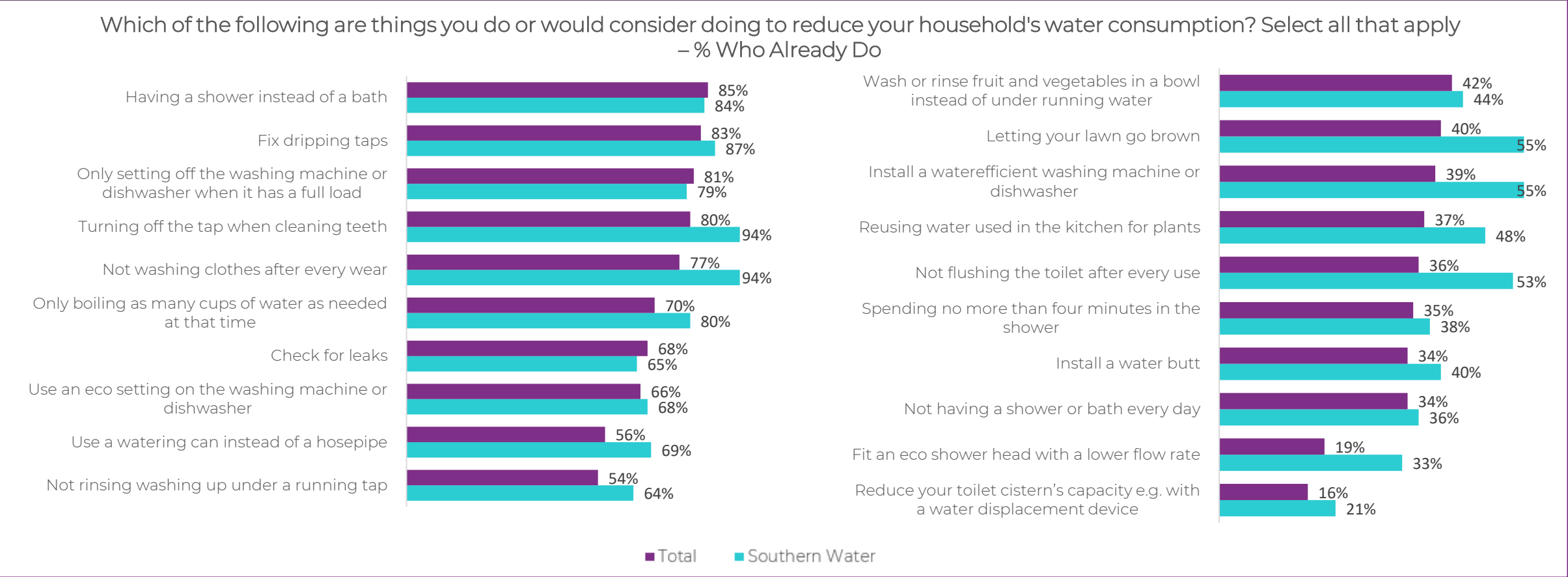
In line with the norm, 63% of Southern Water community members already had a meter when they moved in. 21% had no choice as their water company fitted one as part of a metering scheme (higher than the norm).

52% of Southern Water community members say they know that households can have a smart water meter installed. This is slightly lower than the norm.



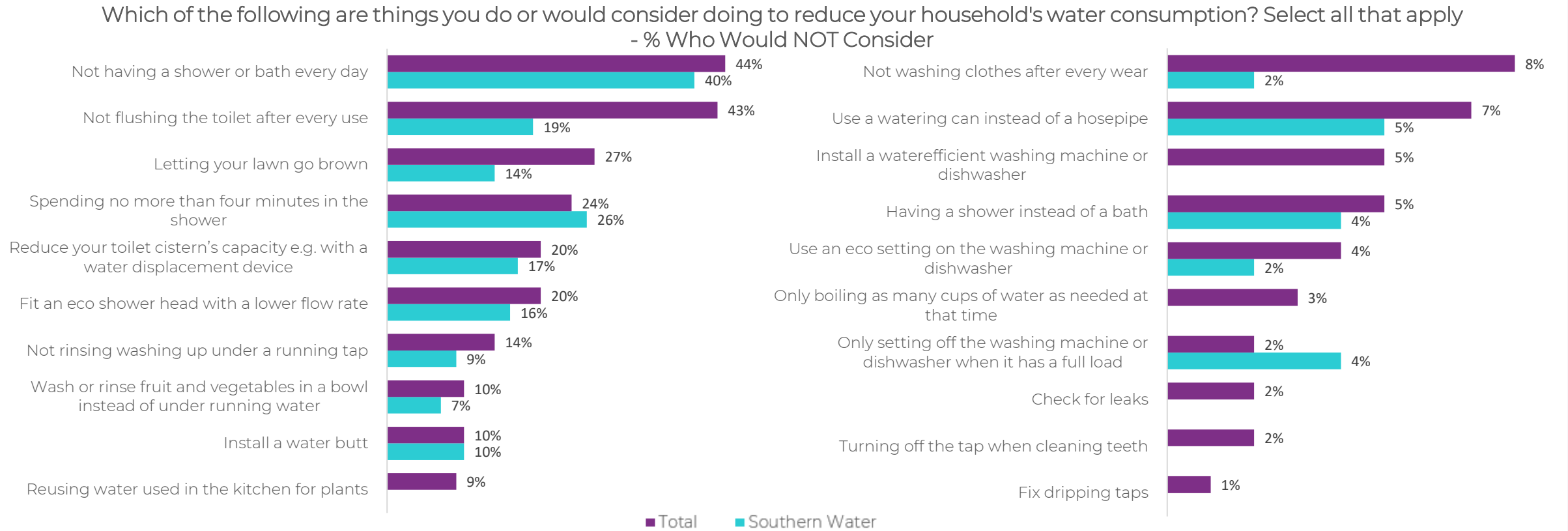
Water-Saving Measures

The majority of Southern Water community members (a higher number compared to the norm) say they are already turning off the tap when cleaning teeth and not washing clothes after every wear. They are also more likely than the norm to fix dripping taps and only boiling as many cups of water as needed at the time.



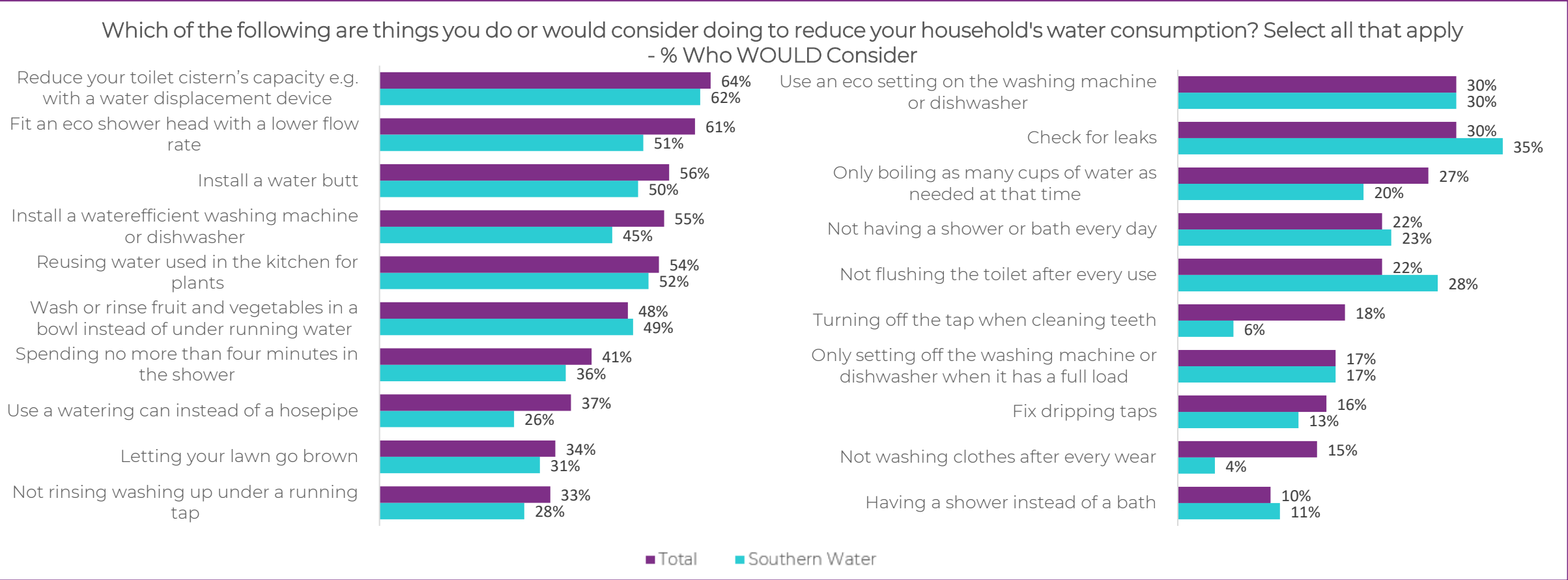
Water-Saving Measures

For Southern Water community members, the water-saving measures generating the greatest resistance are not having a shower or bath every day (although this is lower than the norm) and spending no more than four minutes in the shower (higher than the norm).



Water-Saving Measures

For Southern Water community members, the highest levels of openness are to reducing the toilet cistern's capacity, reusing water used in the kitchen for plants, and fitting an eco shower head.

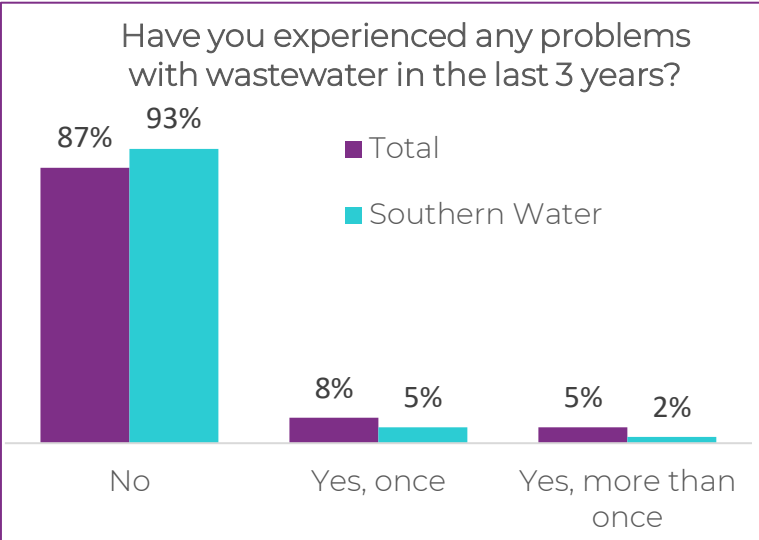
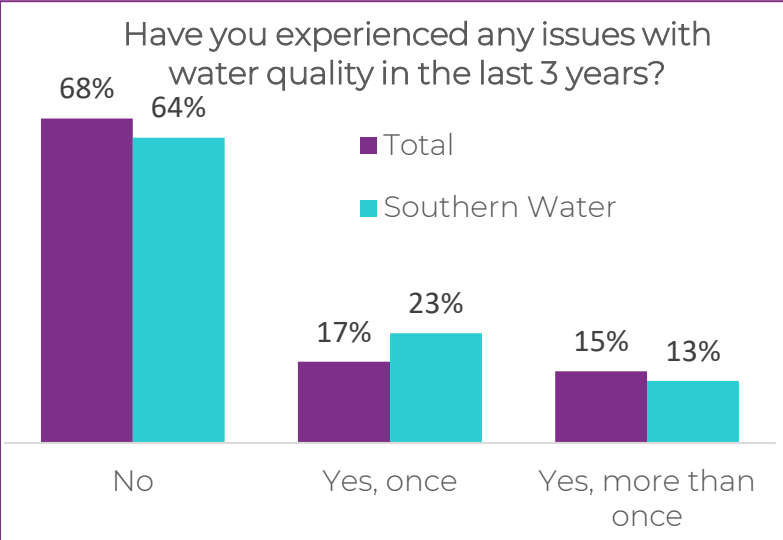
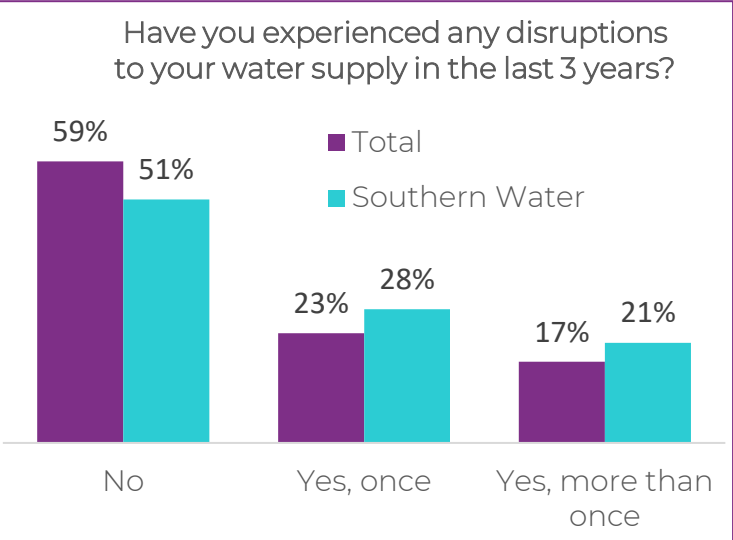


Disruptions & Issues

51% of Southern Water community members say they have not experienced supply disruptions in the last 3 years (slightly lower than the norm). 28% have had one disruption and 21% have had a disruption more than once (both slightly above the norm).

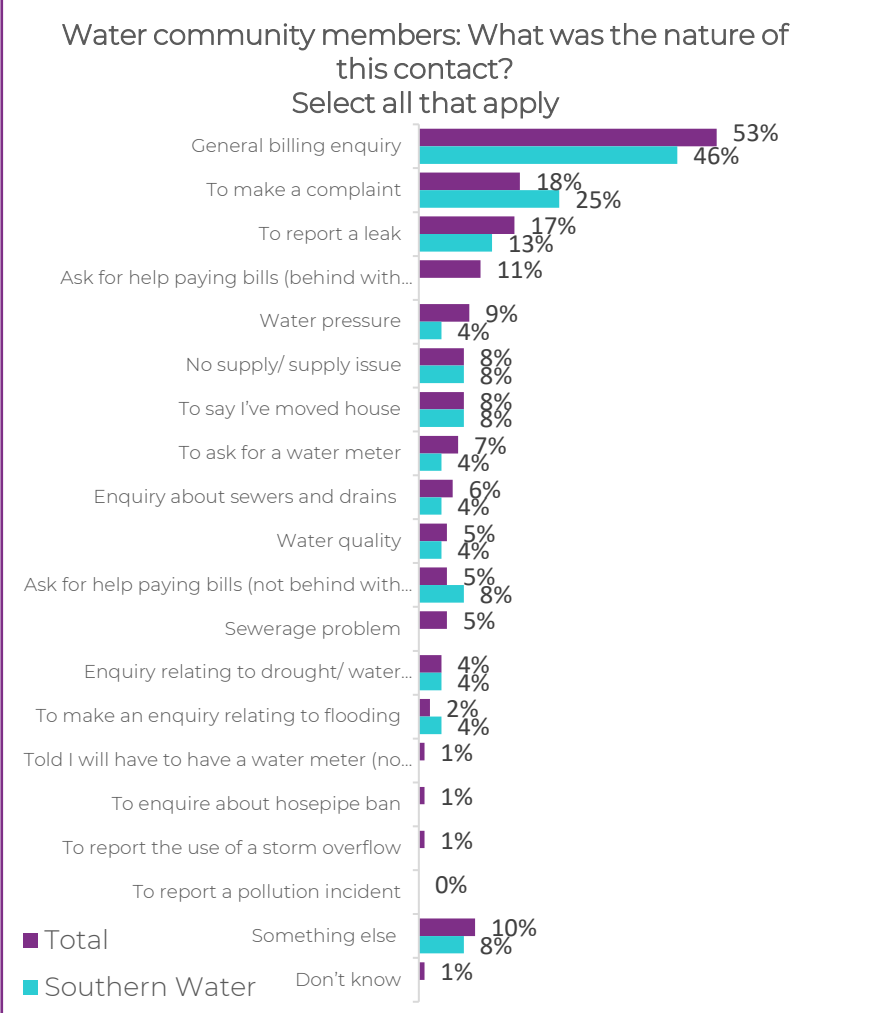
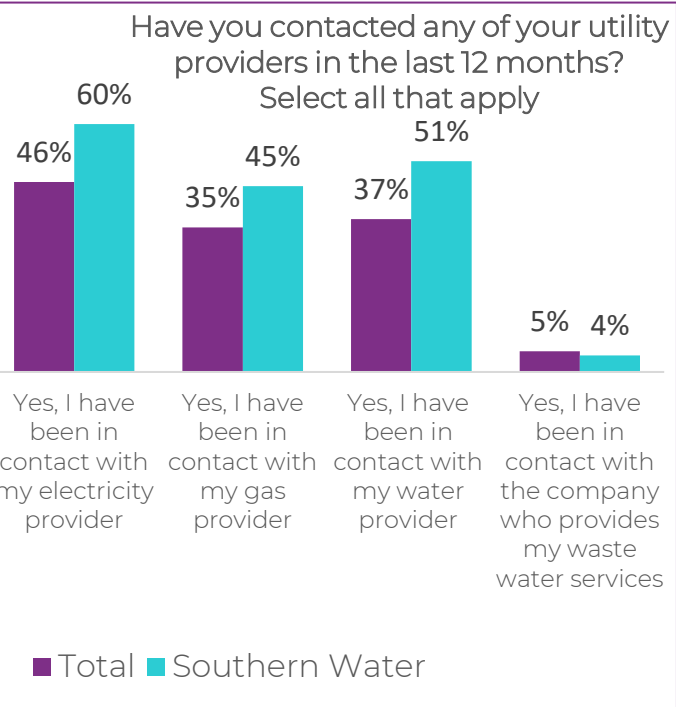
64% of Southern Water community members say they have had no issues with water quality in the last 3 years, marginally lower than the norm. 23% have had one issue (slightly higher than the norm) and 13% more than one issue.

93% of Southern Water community members say they have had no problems in the last 3 years with wastewater (slightly higher than the norm). 5% have once had an issue and 2% have had an issue more than once (both slightly lower than the norm).

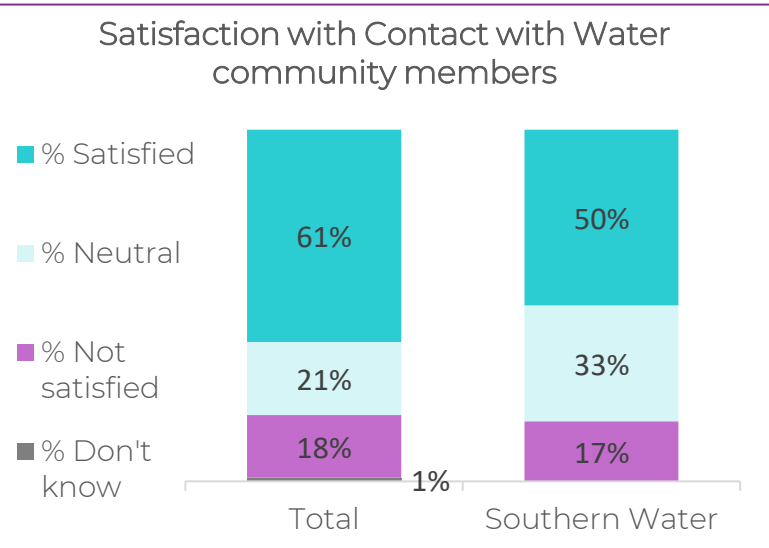


Contact with utility providers

51% of community members have been in contact with Southern Water in the last 12 months (higher than the number who have been in contact with other utility providers).

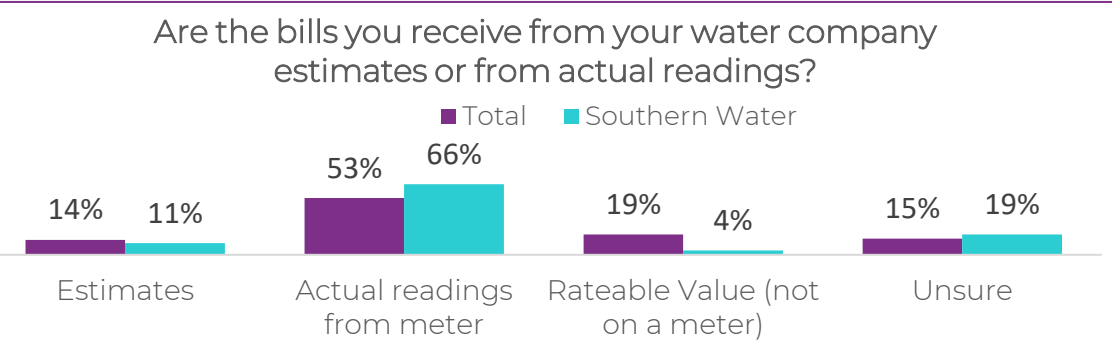


Billing enquiries are the main reason for contacting Southern Water. Making a complaint was selected by 25% of Southern Water community members who made contact, a higher number compared to the norm of 18%. 50% of Southern Water community members who made contact were satisfied with that contact. This is lower than the norm.

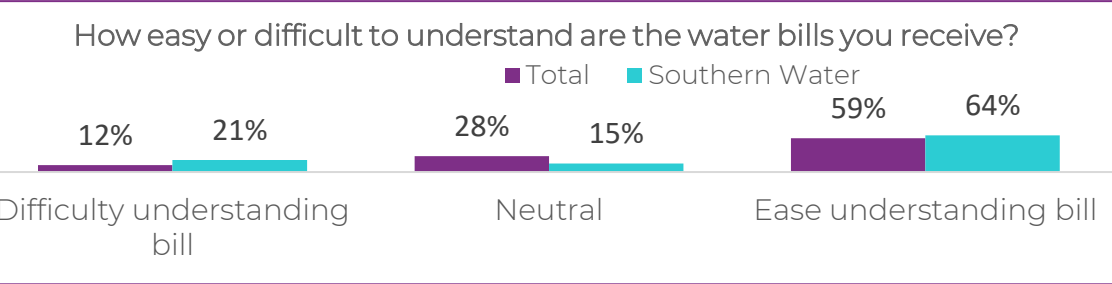


Billing

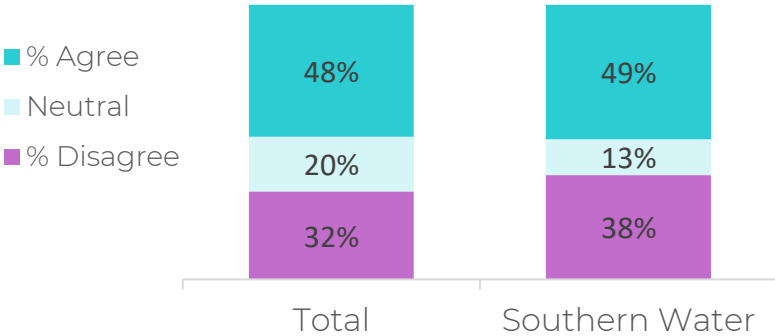
Southern Water community members are more likely than the norm to have their water bills based on actual meter readings and much less likely to have rateable value as the base.



64% of Southern Water community members say they find it easy to understand their water bills. This is slightly above the norm.

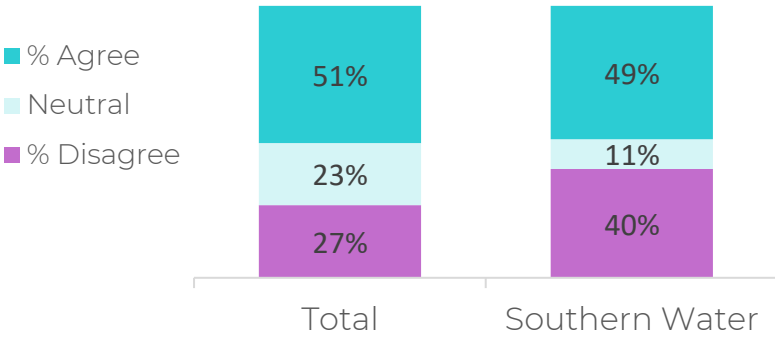


How much do you agree or disagree with the following statements?
I fully understand how my water bill is calculated



49% of Southern Water community members feel they understand how their water bill is calculated, in line with the norm.

How much do you agree or disagree with the following statements?
The charges I pay for my water bill are affordable to me



Southern Water community members are more likely than the norm to disagree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Thames Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

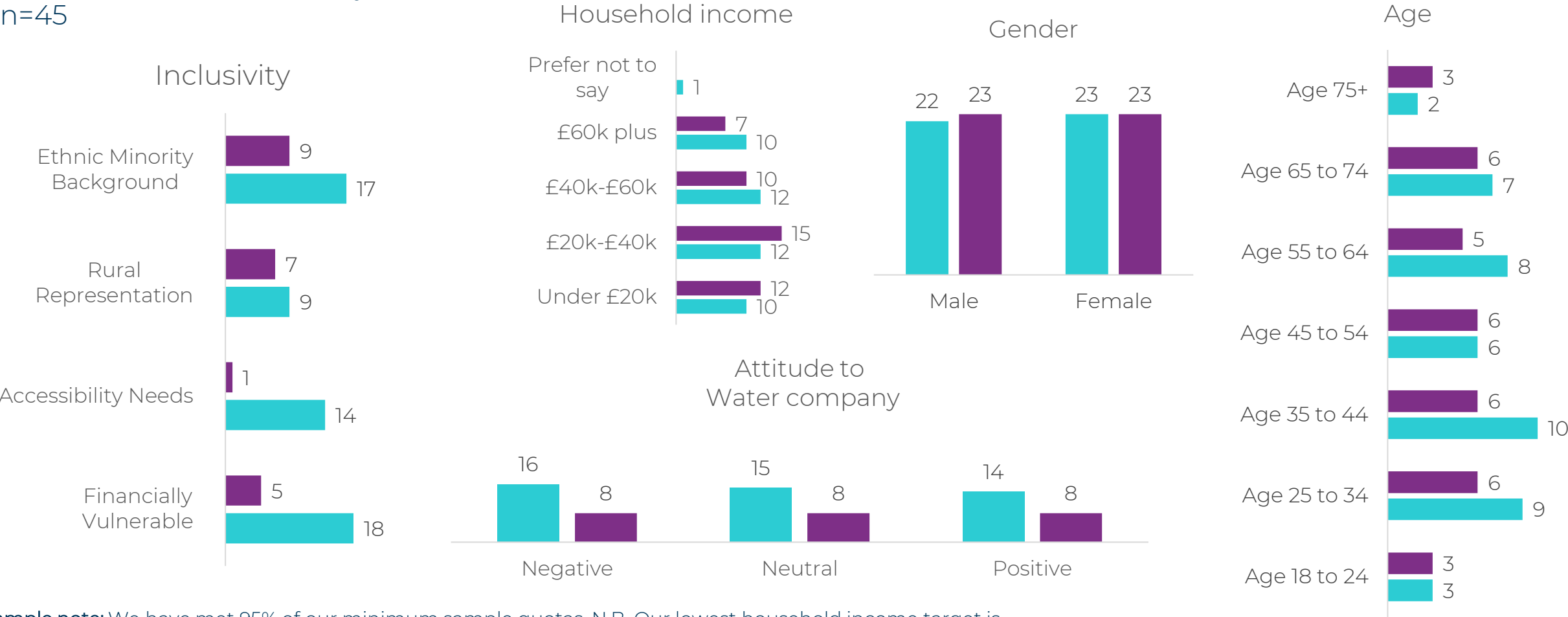
Version: Final copy 15.12.25

ccw.org.uk



The voice for water consumers
Llais defnyddwyr dŵr

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 we were able to reach our financially vulnerable community members 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 75+ sample by at least 1 for next month.

Thames Water

What do Thames Water community members hope this community achieves?



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Being heard & influencing change:** ensure community members views influence decisions and encourage improvements.
- **Improve service quality, reliability and customer experience:** ensure a better day-to-day services from Thames Water (e.g., fixing leaks and infrastructure).
- **Accountability, transparency & responsible use of money:** a greater openness and responsibility from water companies, including how money is being spent.
- **Environmental protection & sustainable water management:** improve waterways, reduce sewage dumping and encourage climate action.
- **Shared learning & collaboration:** contributing ideas and creating solutions to influence future water policies and behaviour.



What Thames Water community members have said...

"I hope it opens up more transparency and the quality of service can be continuously improved." Male, 24, Lives with friends/housemates

"Improve accountability for large companies who provide a service that consumers have little control over." Male, 42, Lives with partner and child/children

"Better service, better usage and lesser environmental impacts." Female, 46, Lives with child/children

"They will achieve accountability which will ensure customers get value for money, that service standards are upheld, and that communities understand where their money goes." Male, 35, Lives with partner and child/children



Thames Water community members want to ensure their concerns and ideas genuinely shape improvements in service quality, accountability, environmental responsibility, and long-term investment. They hope for clearer communication, stronger customer-company relationships, and meaningful action addressing leaks, pollution, costs, and customer needs.

Active community members
Total Base Size: 755
Thames Water Base Size: 45

Water Use at Home

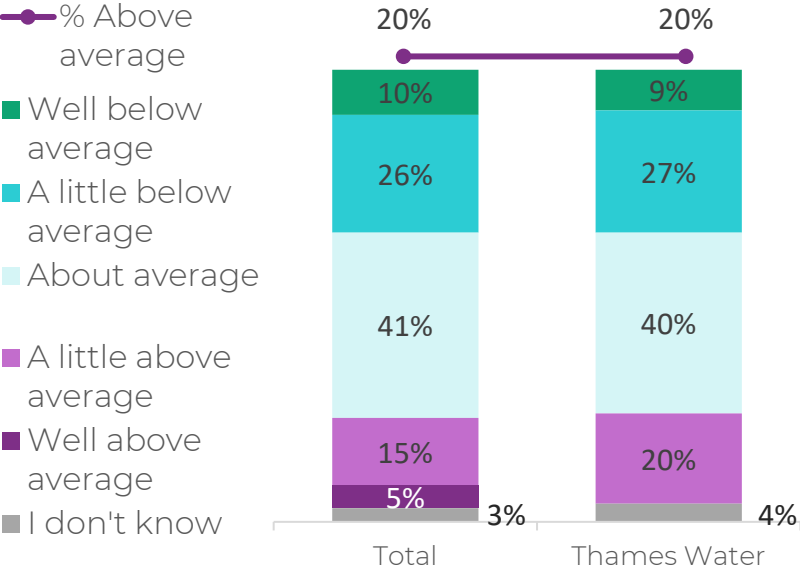


The voice for water consumers
Llais defnyddwyr dŵr

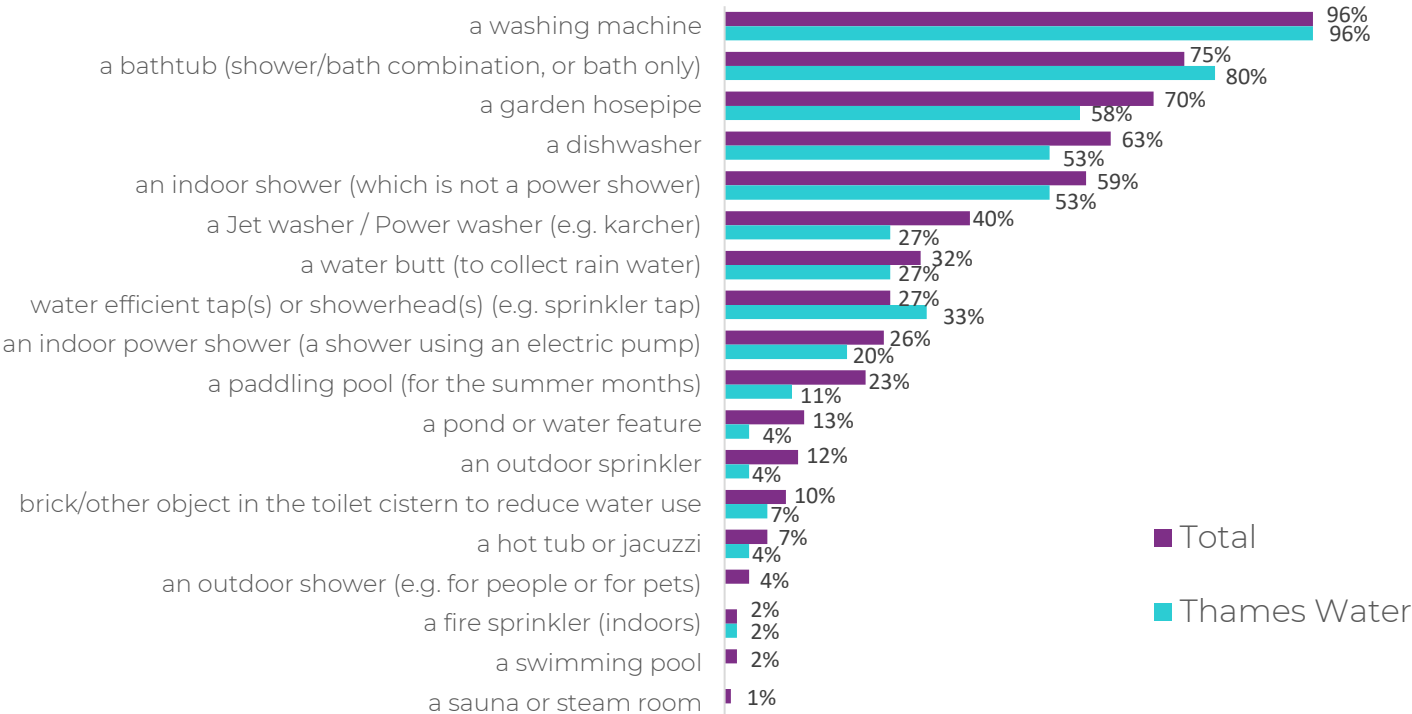
Thames Water community members' stated water consumption is in line with the norm. While 20% say they consume "above average" amounts, 40% say they consume "about average" and 36% indicated their water consumption falls "below average".

Compared to the norm, Thames Water community members are more likely to have a bathtub and less likely to have an indoor shower and indoor power shower. They are also more likely to have water efficient tap(s) or shower head(s).

In a typical week, how much water would you say your household uses vs a similar household?



Which, if any of the following do you, or anyone who lives with you, use/have at home?



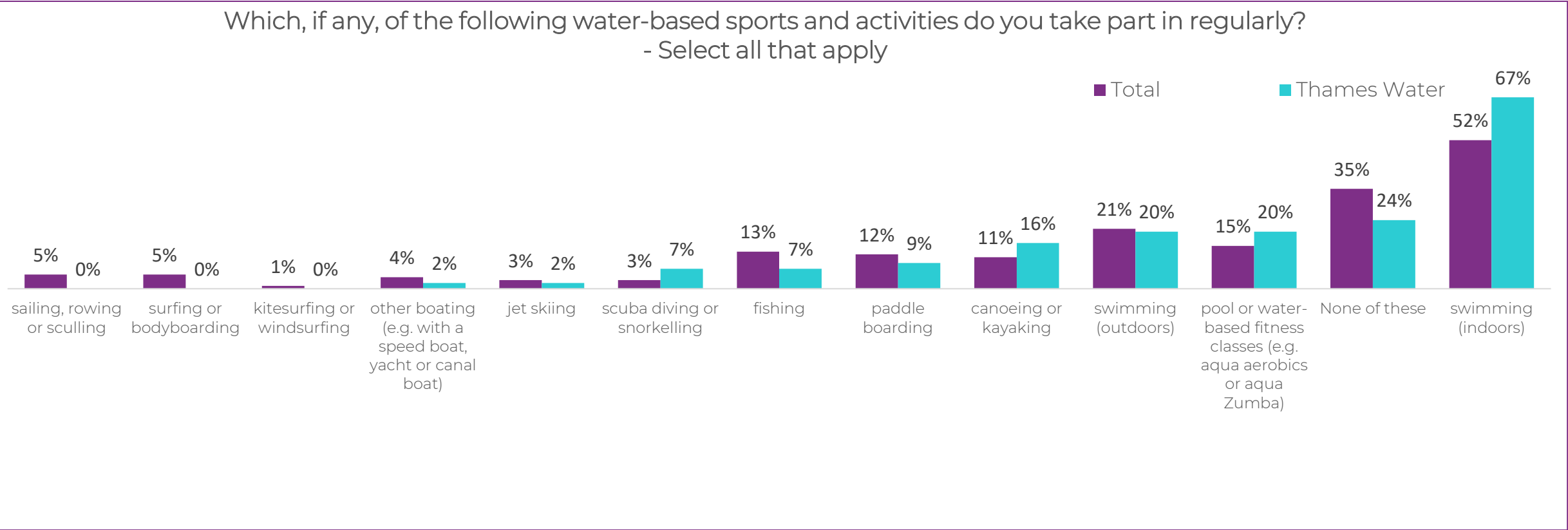
Active community members
Total Base Size: 755
Thames Water Base Size: 45

Water Locations & Activities



The voice for water consumers
Llais defnyddwyr dŵr

Indoor swimming is the most popular water activity among Thames Water community members (67%), while 24% report doing no water-based activities (this is below the norm).



Active community members
Total Base Size: 755
Thames Water Base Size: 45

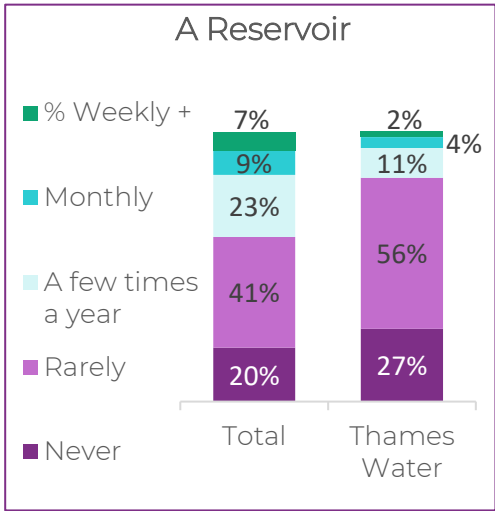
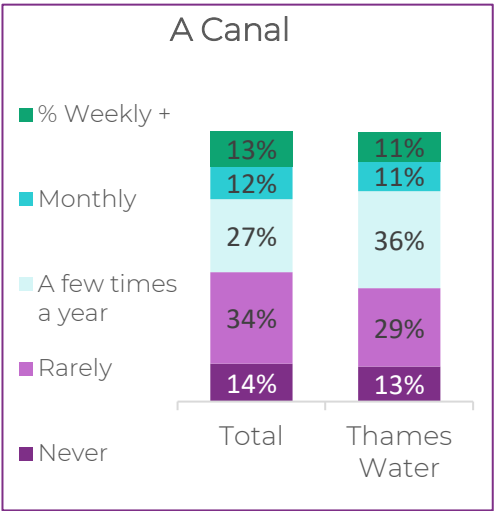
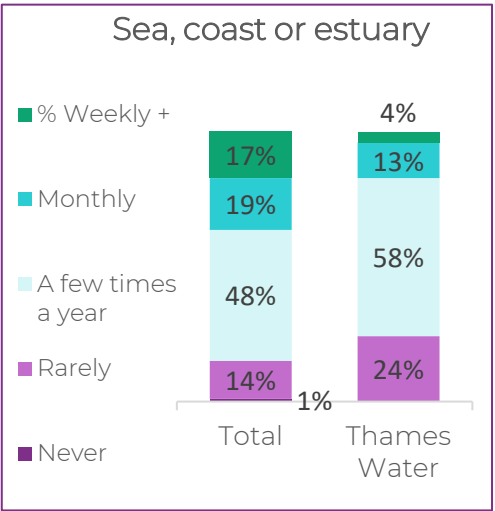
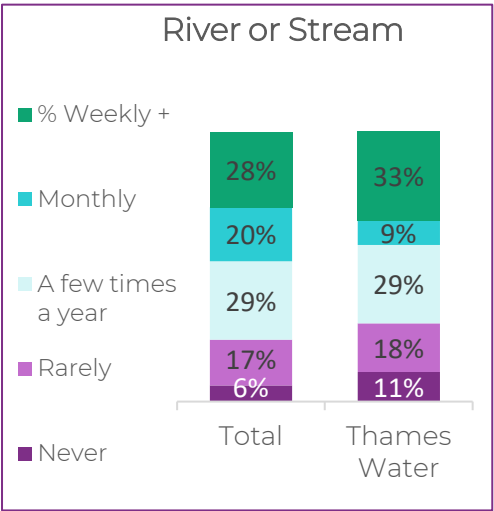
Water Locations & Activities



The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members are less likely than the norm to visit the sea, coast, estuary, canal, or reservoir. They are more likely to visit the sea, cost or estuary just a few times a year and to visit a river or stream weekly.

How often, if at all, do you spend time by or on the water at any of these places shown below?

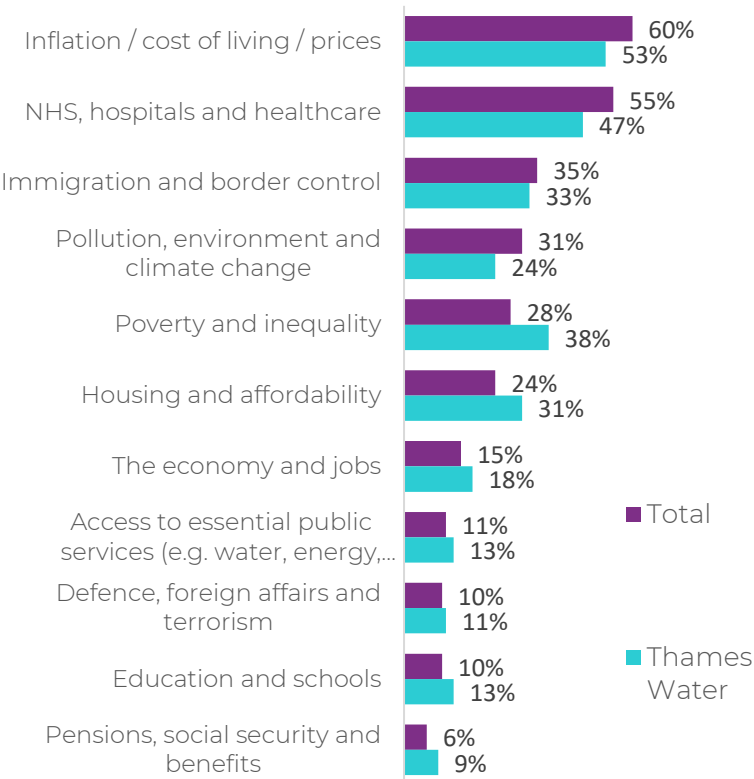


UK Issues

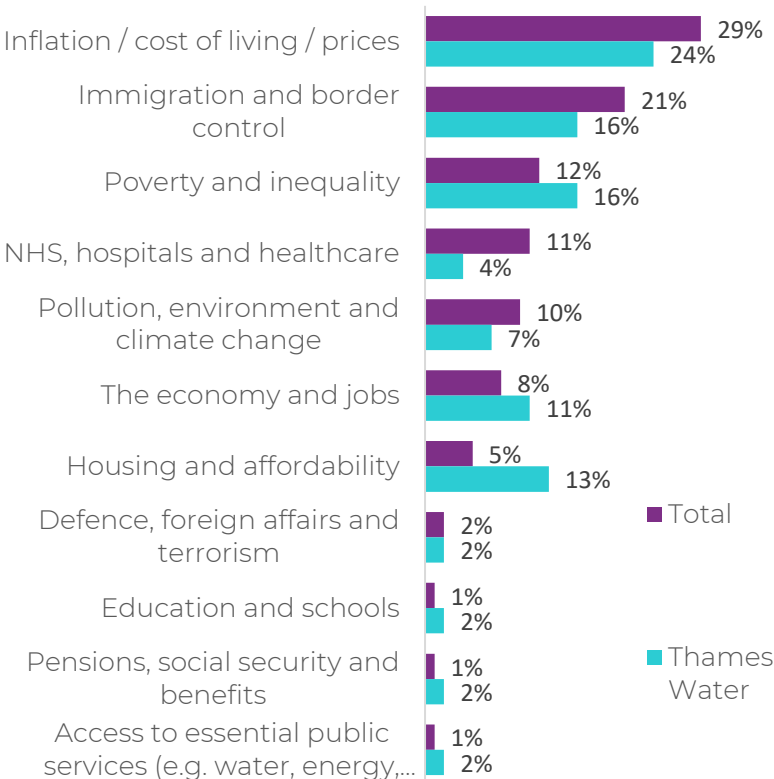


The voice for water consumers
Llais defnyddwyr dŵr

All Issues Facing the UK



One Main issue Facing the UK



Thames Water community members have told us the top issue facing the UK is:

- Inflation / cost of living / prices

This is by a slightly lower number than the norm.

Immigration and border control, along with poverty and inequality, rank jointly as the second biggest issues facing the UK.

Housing and affordability ranks as the third biggest issue, although overall it is placed seventh.

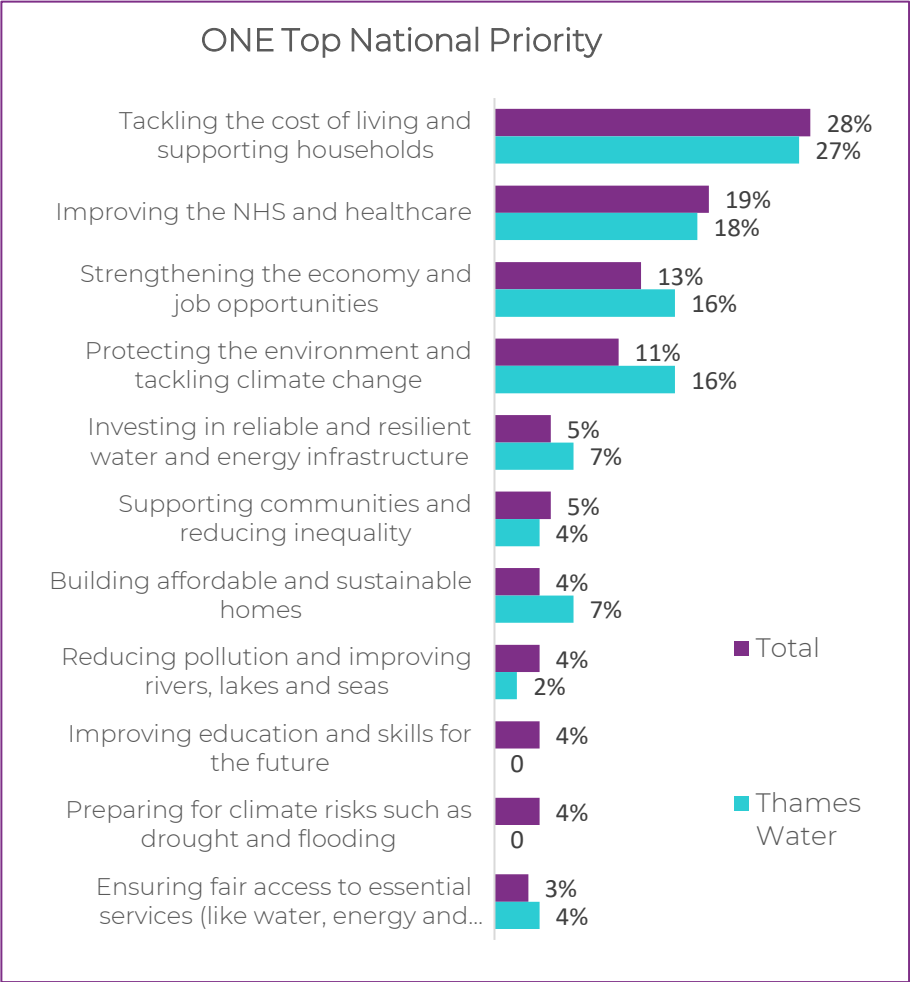
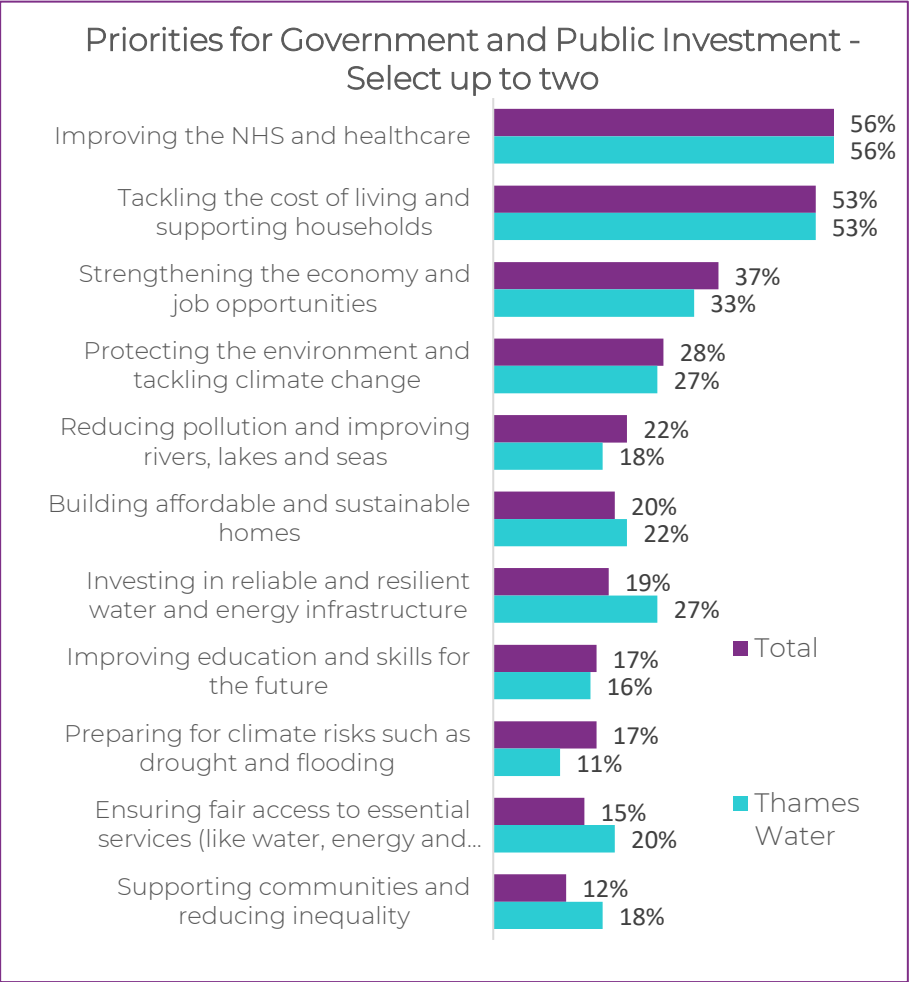
UK Priorities



The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members rank tackling the cost of living and supporting households as the top priority. The second top priority is improving the NHS and healthcare. This is in line with the norm.

Thames Water community members are more likely than the norm to view investment in water and energy infrastructure and the construction of affordable, sustainable homes as priorities for the future.



Environment Concerns

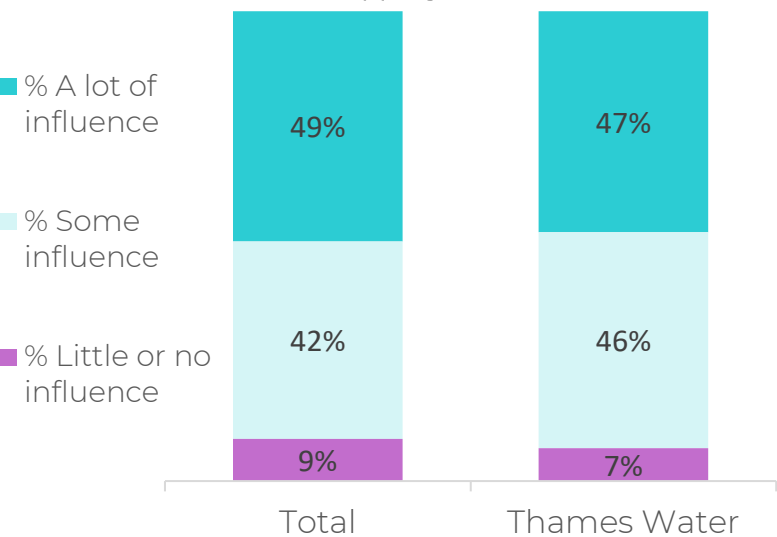
Including Saving Water & Energy



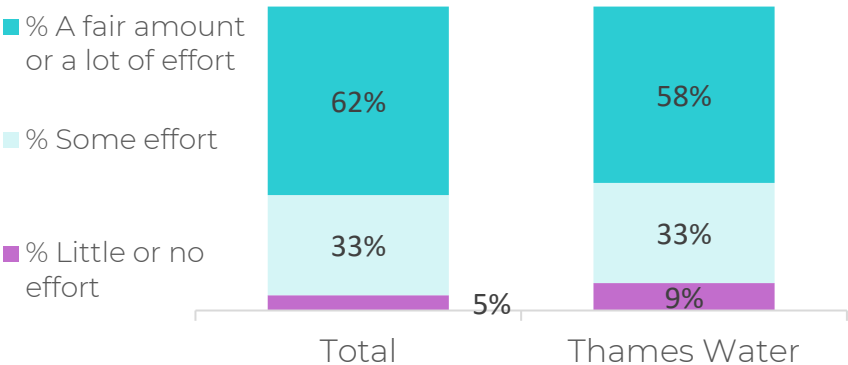
The voice for water consumers
Llais defnyddwyr dŵr

Compared to the norm, Thames Water community members are slightly less likely to report that concern for the environment significantly influence their daily choices.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

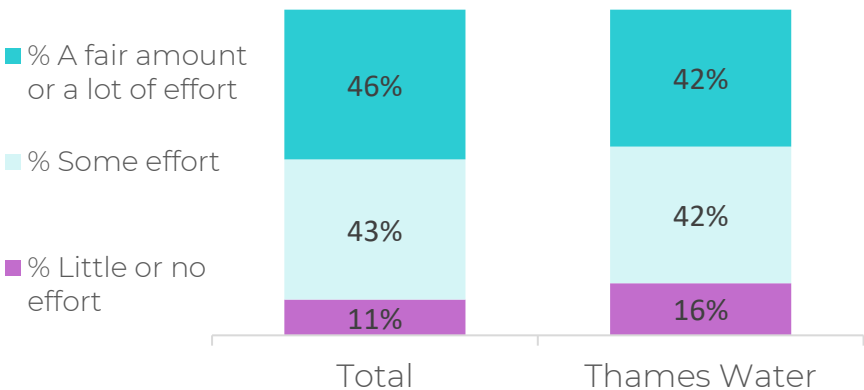


How much effort does your household make at home to save ENERGY?



58% of Thames Water community members say they make a fair amount or a lot of effort to save energy. This is slightly below the norm.

How much effort does your household make at home to save WATER?



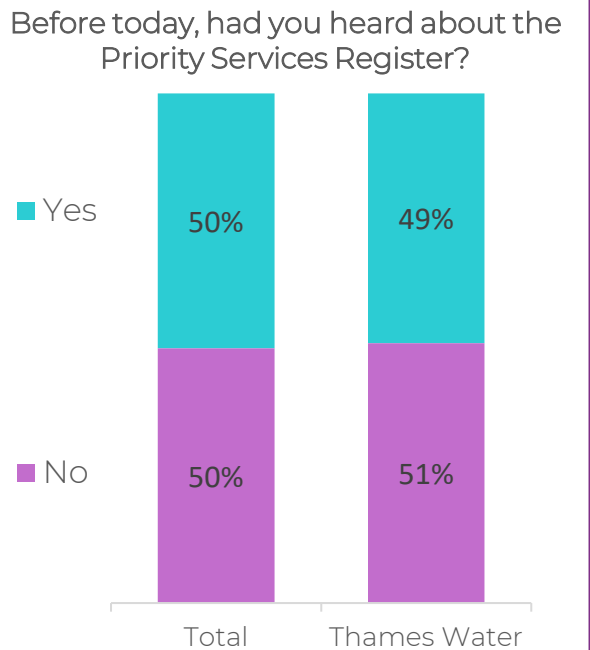
Thames Water community members are slightly less likely to say they make a fair amount or a lot of effort to save water compared to the norm.

Priority Services Register

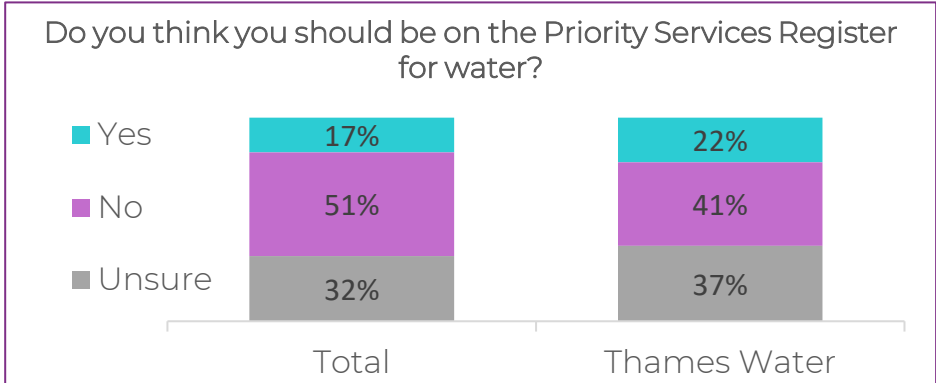
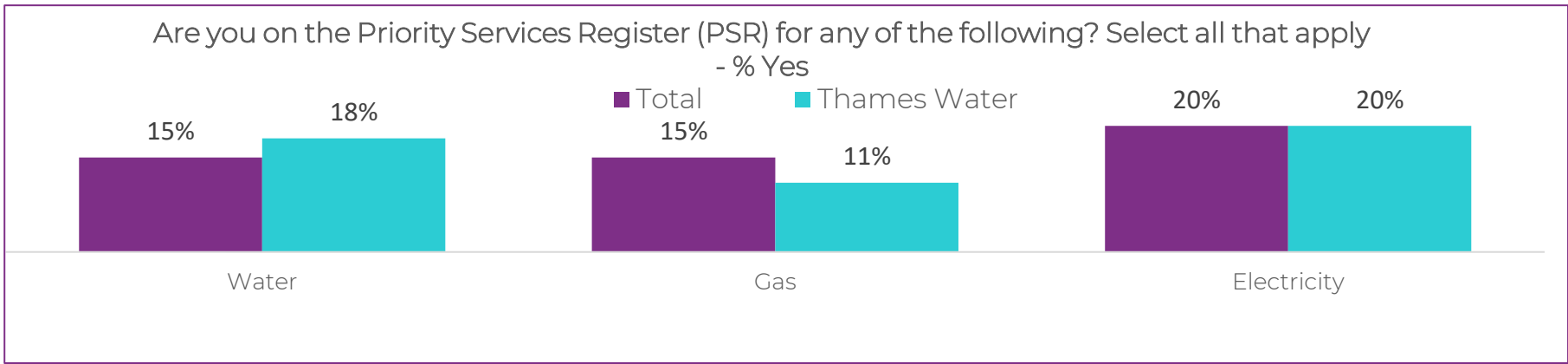


The voice for water consumers
Llais defnyddwyr dŵr

Overall, 49% of Thames Water community members say they have heard of the Priority Services Register.



More of Thames Water community members say they are on the Priority Services Register for electricity than they are for gas or water.



For those not currently on the Priority Services Register for water, 22% of Thames Water community members think they should be on it.

Water Meters

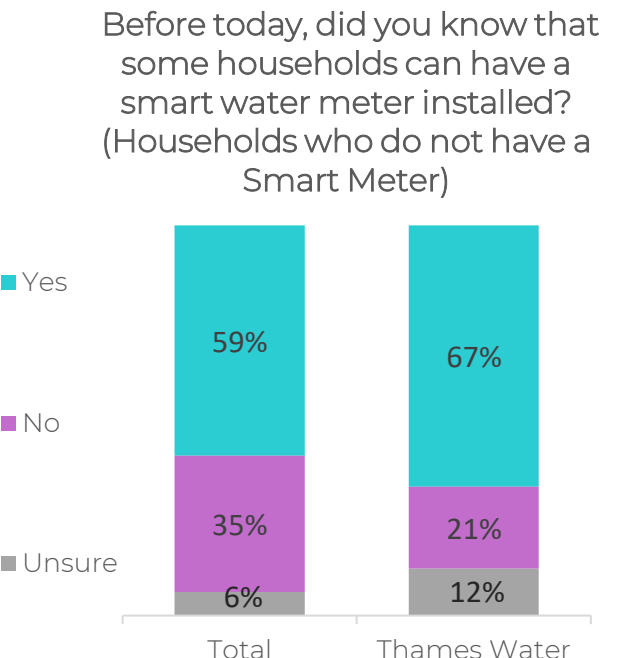
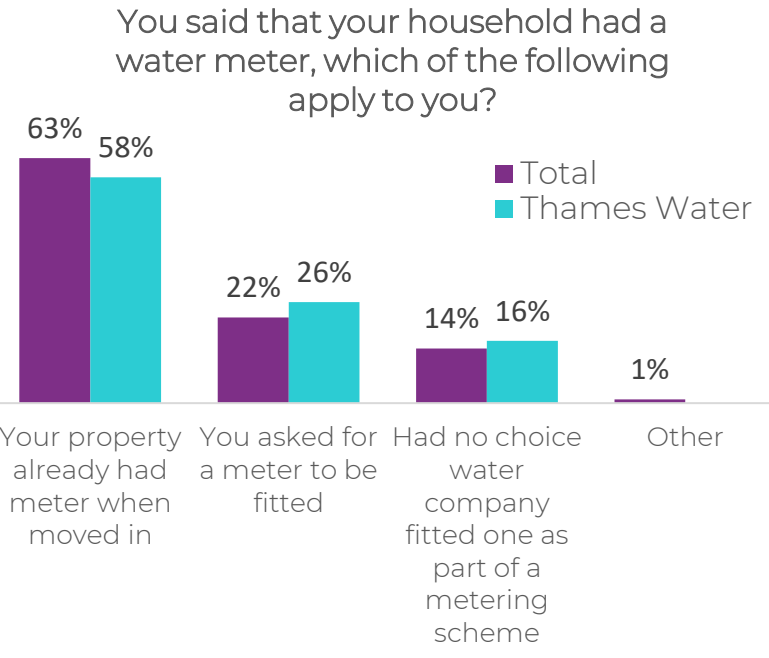
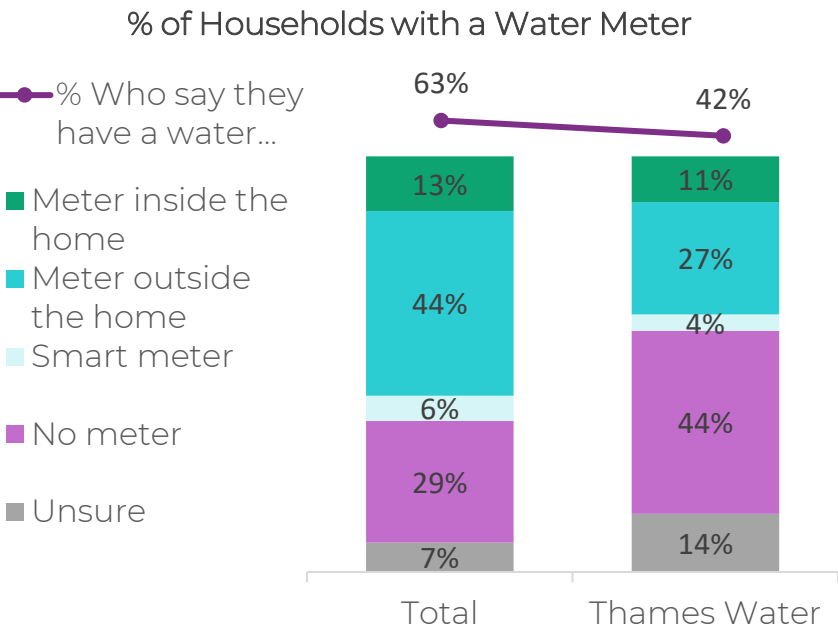


The voice for water consumers
Llais defnyddwyr dŵr

Thames Water community members are more likely than the norm to have “no meter” at home. Compared to the norm, they are less likely to have a meter outside the home and only marginally less likely to have a meter inside the home and a smart meter.

Compared to the norm, Thames Water community members are less likely to already have had a meter when they moved in. However, they are slightly more likely to have asked for the meter to be fitted or to have had no choice.

67% of Thames Water community members say they know that households can have a smart water meter installed.

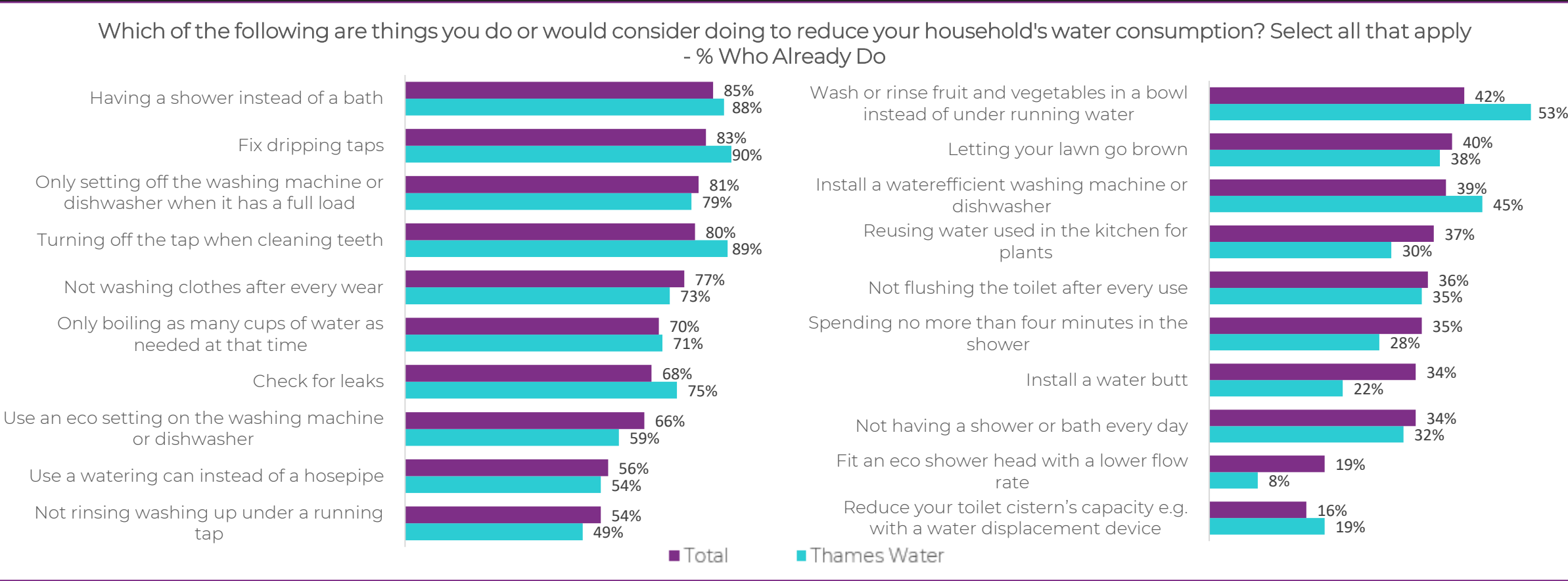


Water-Saving Measures



The voice for water consumers
Llais defnyddwyr dŵr

The majority of Thames Water community members (and a higher number compared to the norm) say they are already switching to fixing dripping taps, turning off the tap when cleaning teeth, and having a shower instead of a bath.



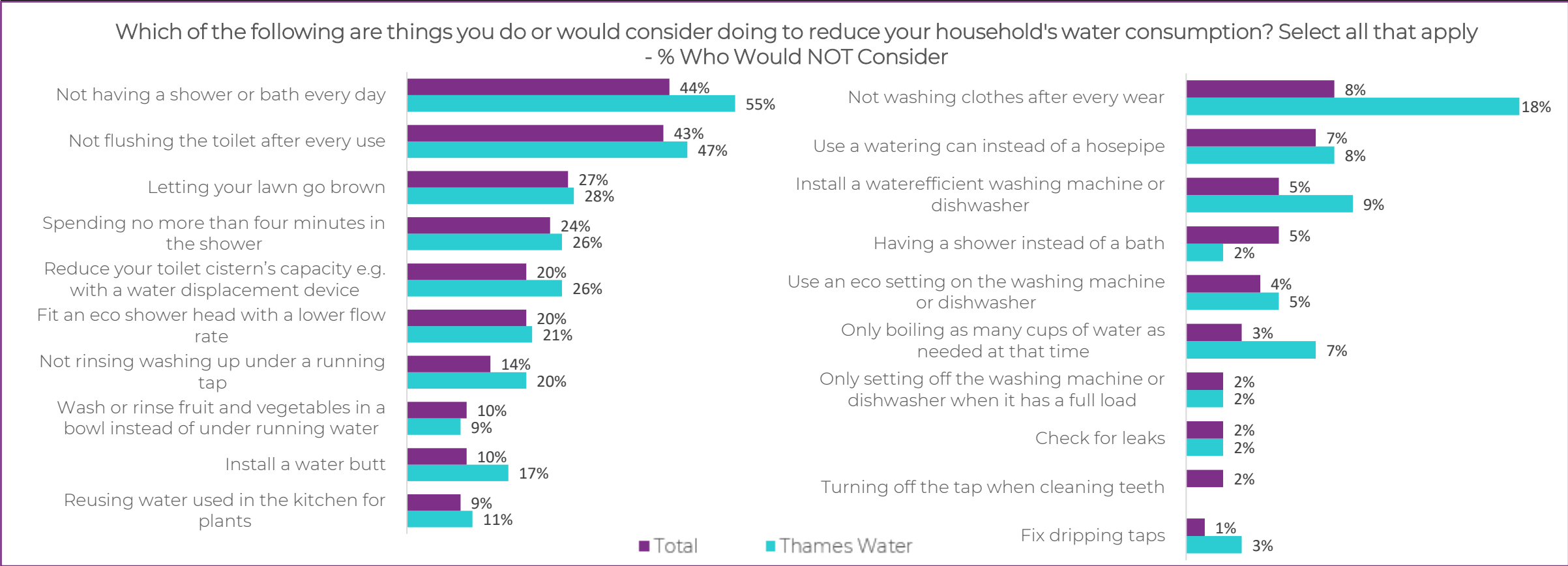
Active community members
Total Base Size: 755
Thames Water Base Size: 45

Water-Saving Measures



The voice for water consumers
Llais defnyddwyr dŵr

For Thames Water community members, the water-saving measures generating the greatest resistance are not having a shower or bath every day and not flushing the toilet, with both resisted by a higher number compared to the norm.



Active community members
Total Base Size: 755
Thames Water Base Size: 45

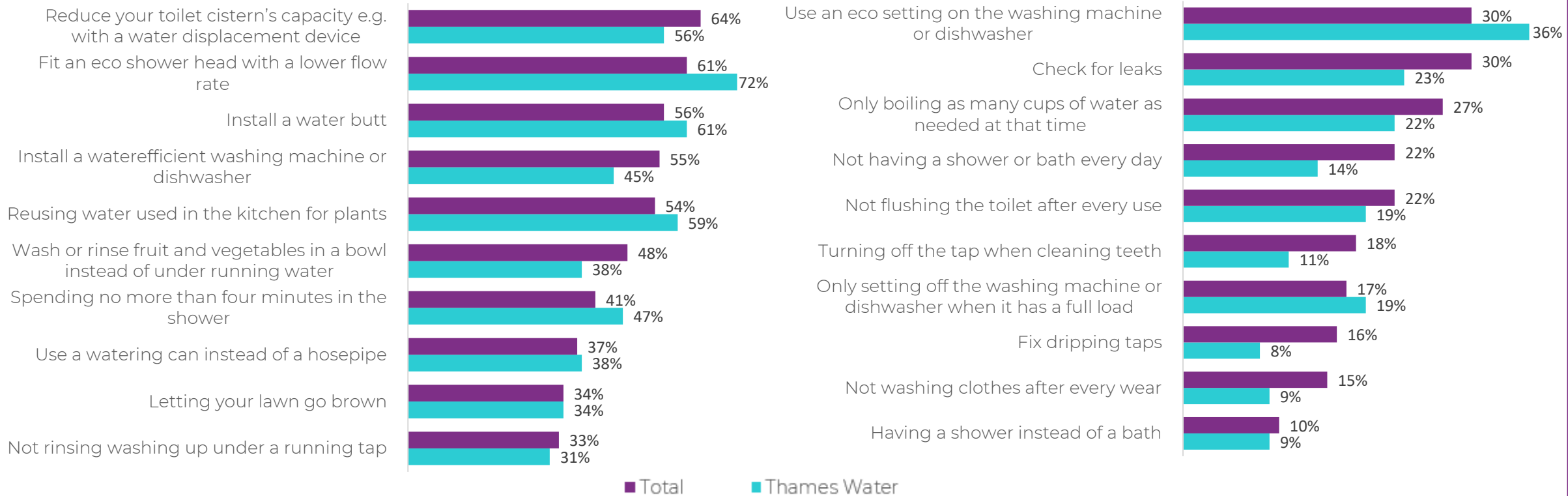
Water-Saving Measures



The voice for water consumers
Llais defnyddwyr dŵr

For Thames Water community members, the highest levels of openness are to fitting an eco shower head, installing a water butt, and reusing water used in the kitchen for plants. All three are higher than the norm.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who WOULD Consider



Active community members
Total Base Size: 755
Thames Water Base Size: 45

Disruptions & Issues

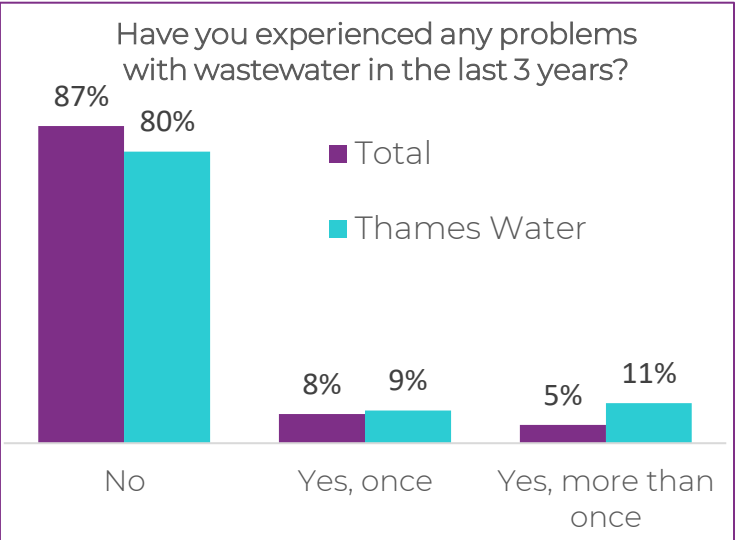
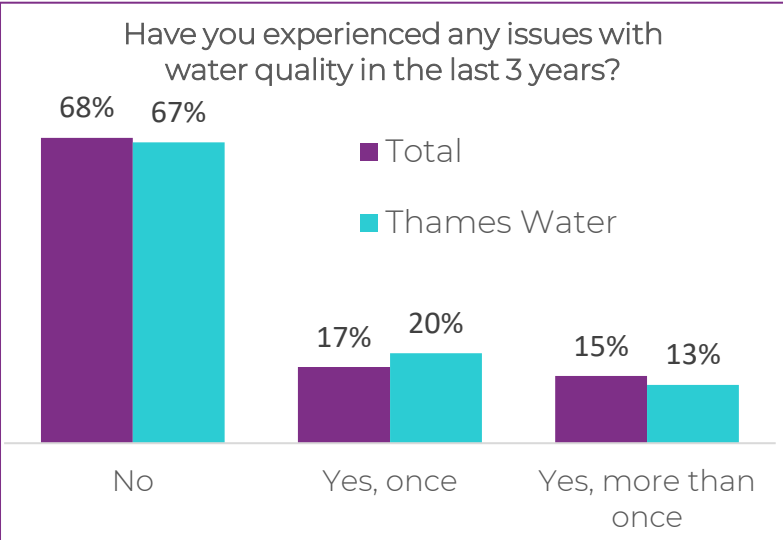
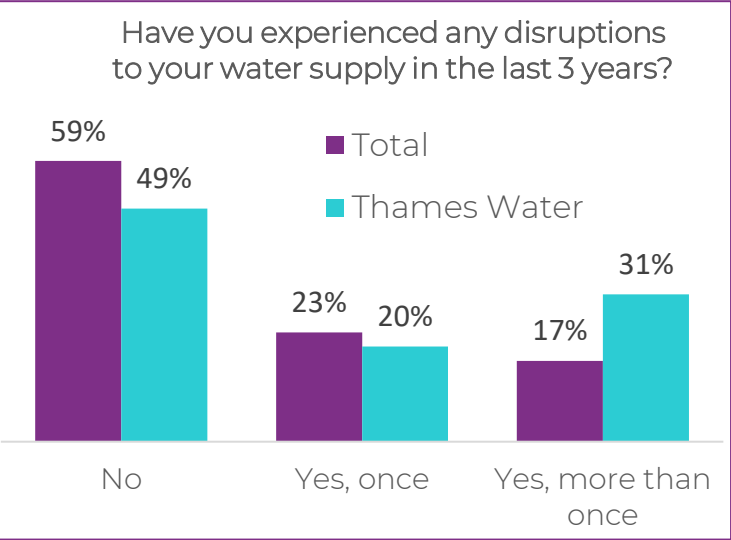


The voice for water consumers
Llais defnyddwyr dŵr

49% of Thames Water community members say they have not experienced supply disruptions in the last 3 years (lower than the norm). 20% have had one disruption and 31% have had a disruption more than once (above the norm).

67% of Thames Water community members say they have had no issues with water quality in the last 3 years, on a par with the norm. 20% have had one issue, and 13% more than one issue.

80% of Thames Water community members say they have had no problems in the last 3 years with wastewater (slightly below the norm). 9% have once had an issue and 11% have had an issue more than once (slightly above the norm).

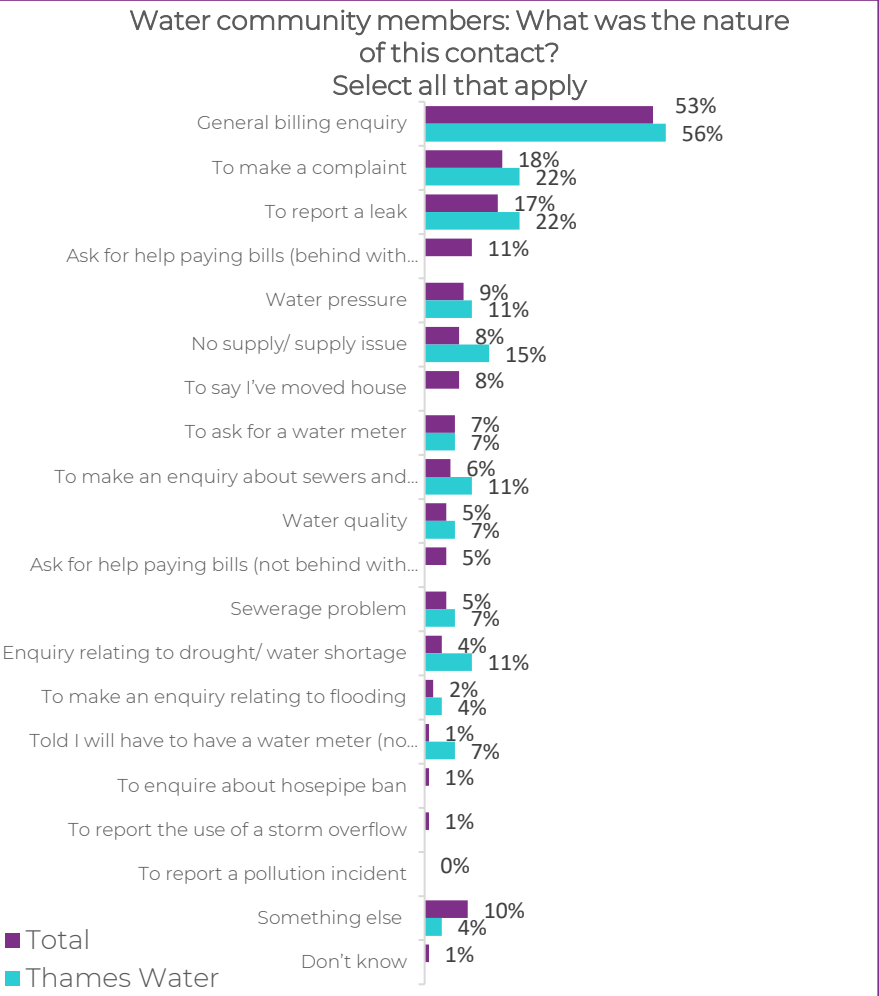
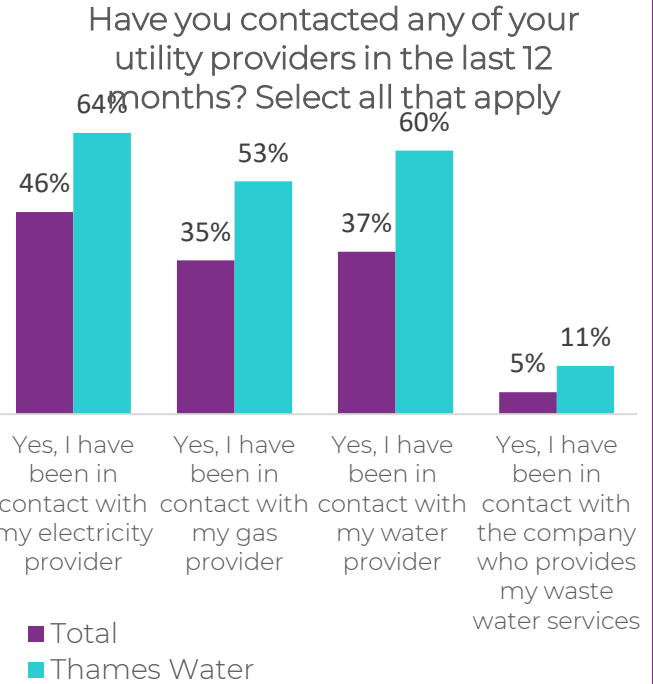


Contact with utility providers

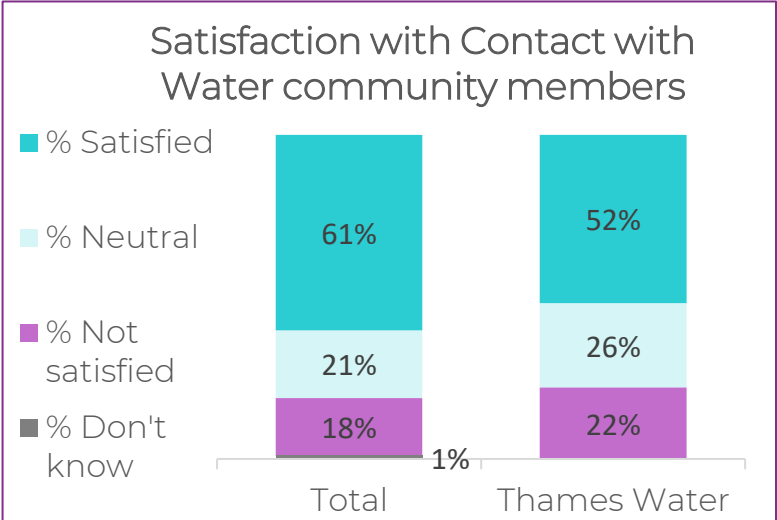


The voice for water consumers
Llais defnyddwyr dŵr

60% of community members have been in contact with Thames Water in the last 12 months. This is higher than the norm.



Billing enquiries are the main reason for contacting Thames Water. Making a complaint was selected by 22% of Thames Water community members who made contact, a slightly higher number compared to the norm of 18%. 52% of Thames Water community members who made contact were satisfied with that contact. This is lower than the norm.

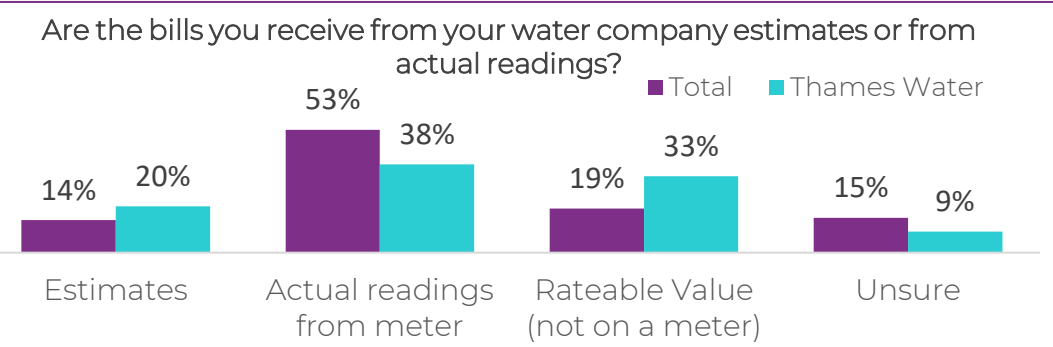


Billing

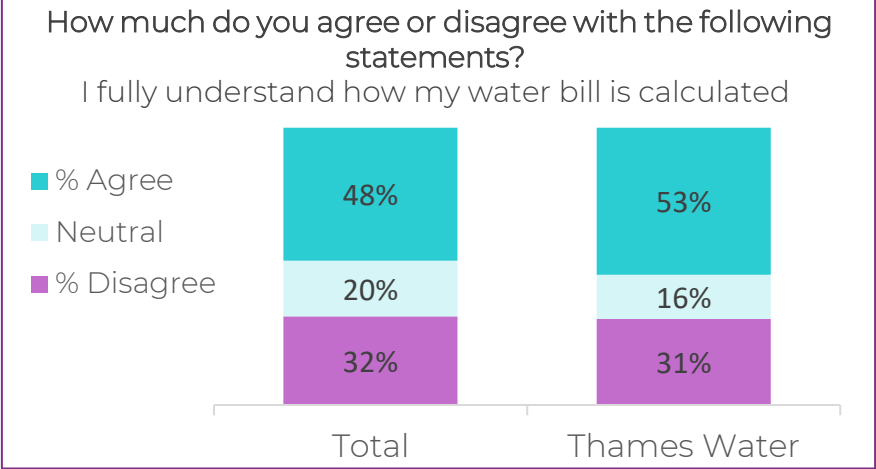
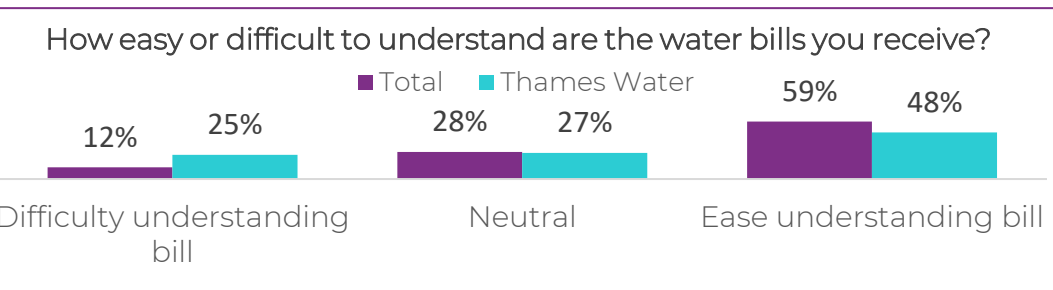


The voice for water consumers
Llais defnyddwyr dŵr

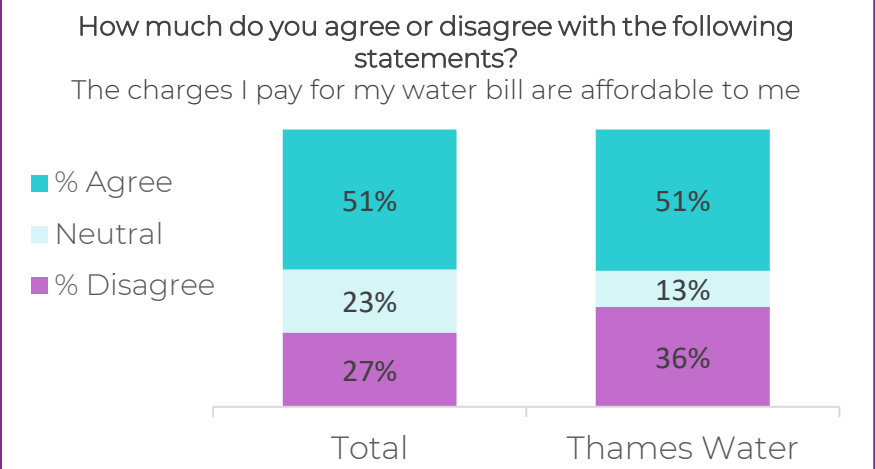
Thames Water community members are more likely than the norm to have their water bills based on rateable value and estimates.



48% of Thames Water community members say they find it easy to understand their water bills, slightly below the norm.



53% of Thames Water community members feel they understand how their water bill is calculated, slightly above the norm.



Thames Water community members are more likely than the norm to disagree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

United Utilities
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

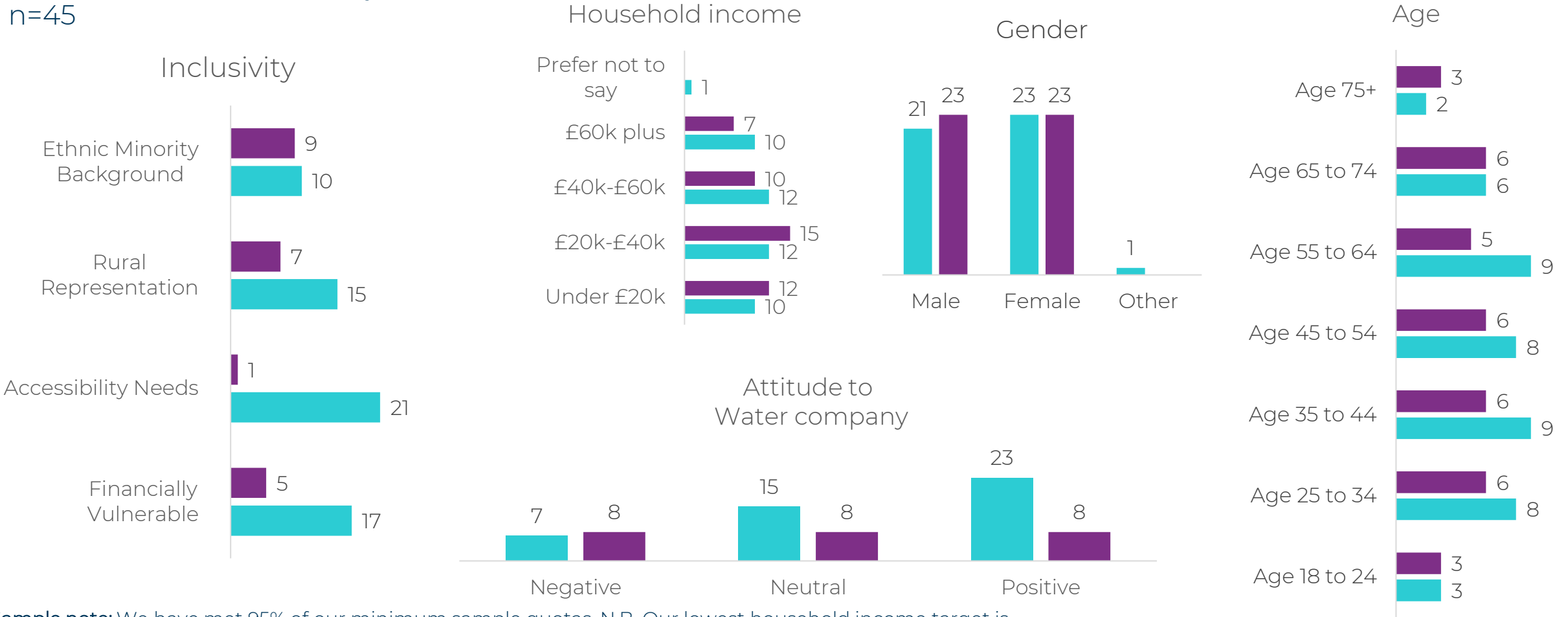
ccw.org.uk

United Utilities

Community population



United Utilities community members:
n=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 we were able to reach our financially vulnerable community members 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 75+ sample by at least 1 for next month.

Current Quota Minimum Quota

United Utilities

What do United Utilities community members hope this community achieves?



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Being heard & influencing change:** ensure community members views influence decisions and encourage improvements.
- **Improve service quality, water management and customer experience:** desire for practical improvements across the water system, better service quality and reliability.
- **Accountability & transparency:** ensuring companies are held to account and ensure clearer insight into how they operate.
- **Environmental protection & responsible water use:** protecting water quality and ensuring a clean and safe supply.
- **Shared learning & collaboration:** better communication and understanding of the remit of water companies. They value the collaborative aspect of the community.



What United Utilities community members have said...

"I hope the Water Voice panel sparks real change by making sure people's water challenges are heard and acted on." Male, 43, Lives with partner and child/children

"A better understanding of what we are paying for and the improvements that will be made." Female, 36, Lives with partner and child/children

"Answers and clarity. Most utility companies don't care about their customers and profits are the only thing that's important for them." Male, 60, Lives with child/children

"To make companies more responsible for customers and environment." Female, 47, Lives alone



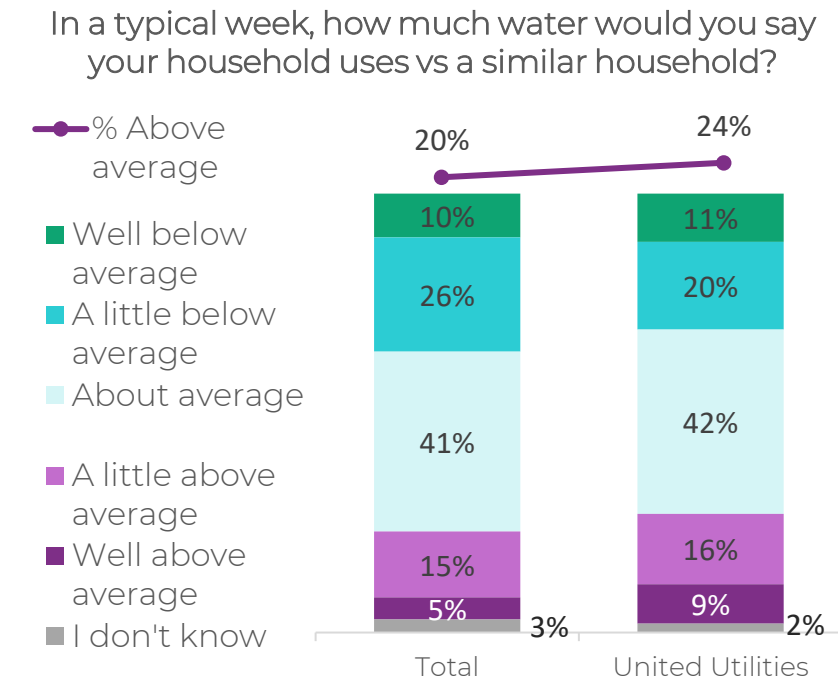
United Utilities community members want to ensure their voices directly drive improvements in service quality, transparency, and environmental responsibility. They expect stronger communication, better understanding of how companies operate, and collaborative solutions that make water services fairer, more efficient, and more sustainable for all.

Active community members
Total Base Size: 755
United Utilities Base Size: 45

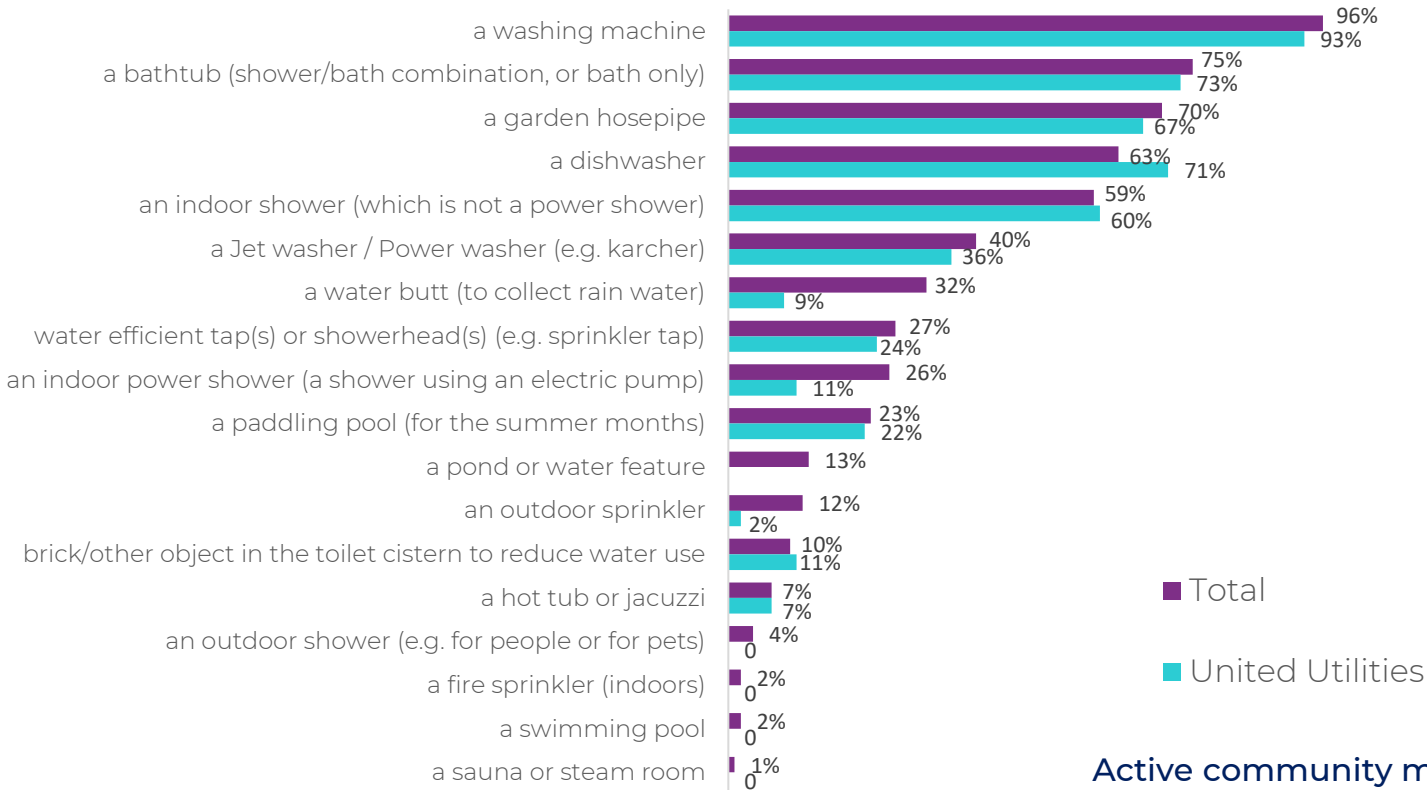
Water Use at Home

United Utilities community members are slightly more likely to say their water consumption is “above average” compared to the norm. 31% say their water consumption is “below average”, slightly below the norm.

United Utilities community members are more likely than the norm to have a dishwasher, and a brick or other object used in the toilet cistern. They are considerably less likely to have a water butt compared to the norm.

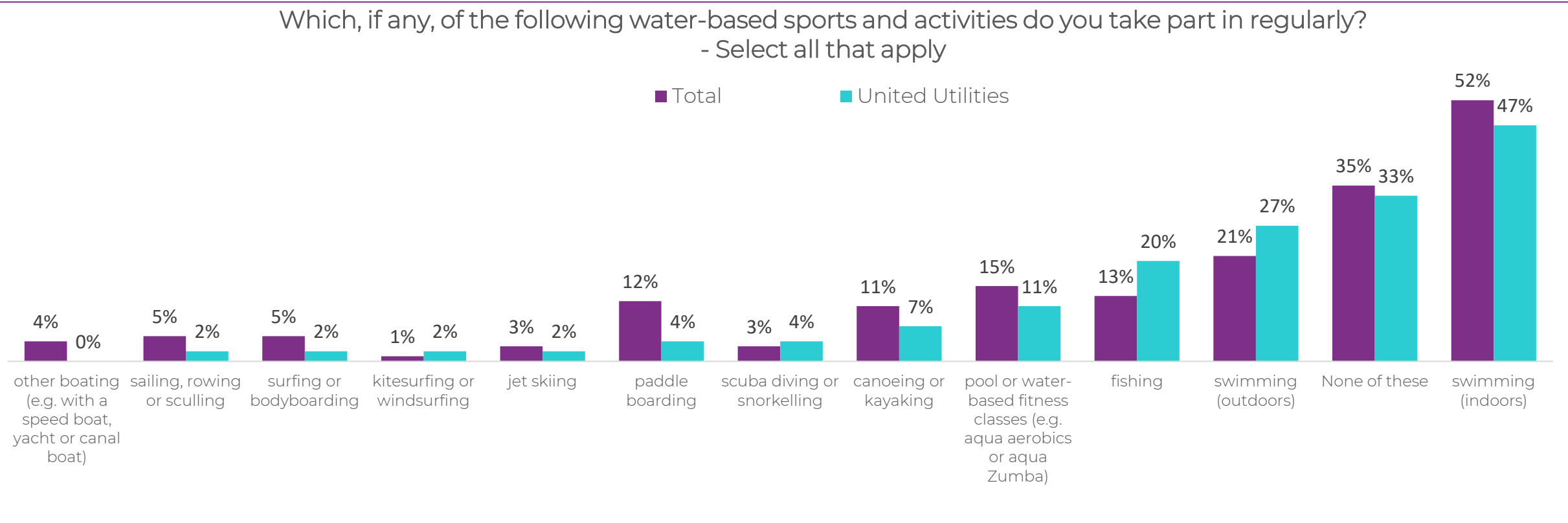


Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Water Locations & Activities

Swimming (indoors) is by far the most common water-based activity for United Utilities community members, although this is lower than the norm. 33% do not regularly practice any of the activities listed. This is followed by swimming (outdoors) and fishing.

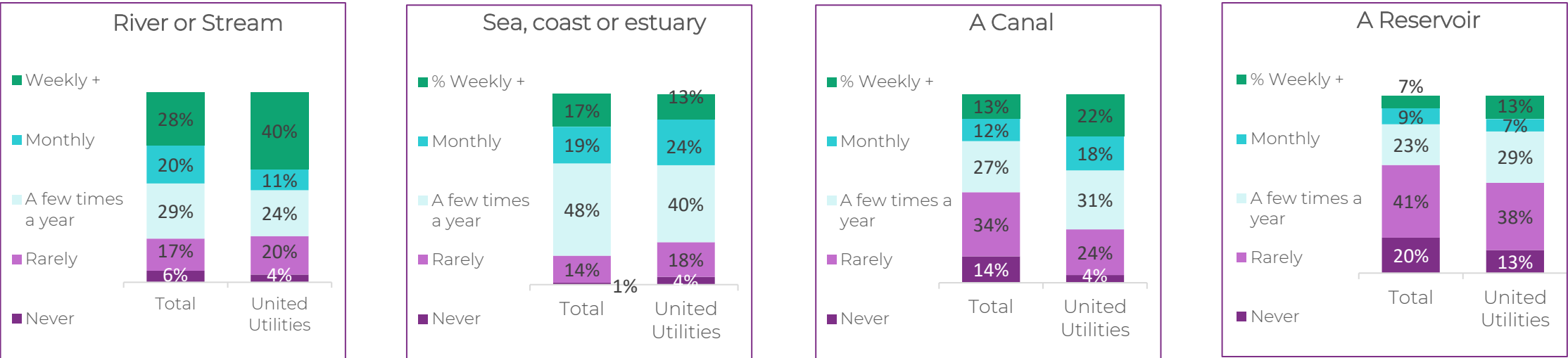


Water Locations & Activities



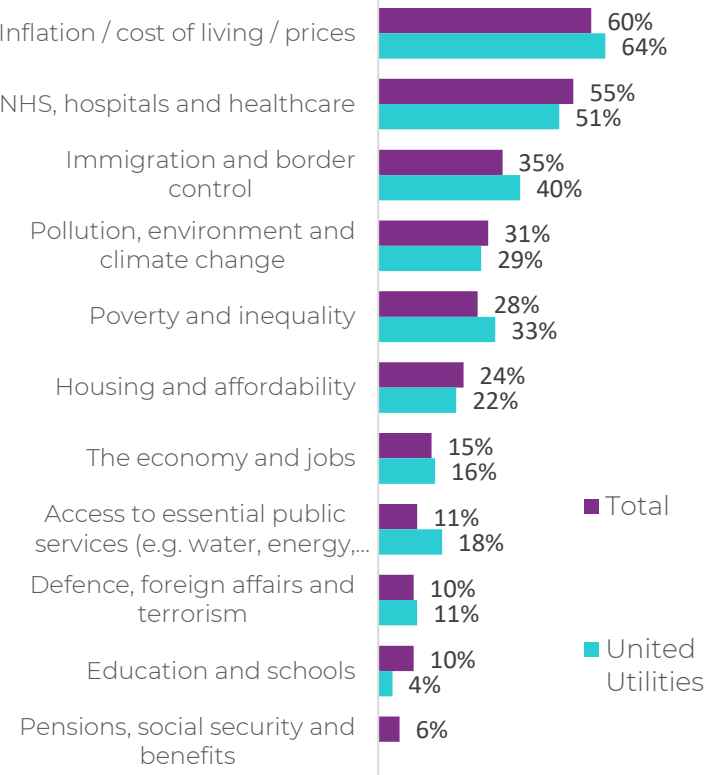
United Utilities community members are more likely than the norm to visit canals or reservoirs. They are more likely to visit rivers or streams weekly and slightly less likely to visit the sea, coast or estuary just a few times a year.

How often, if at all, do you spend time by or on the water at any of these places shown below?

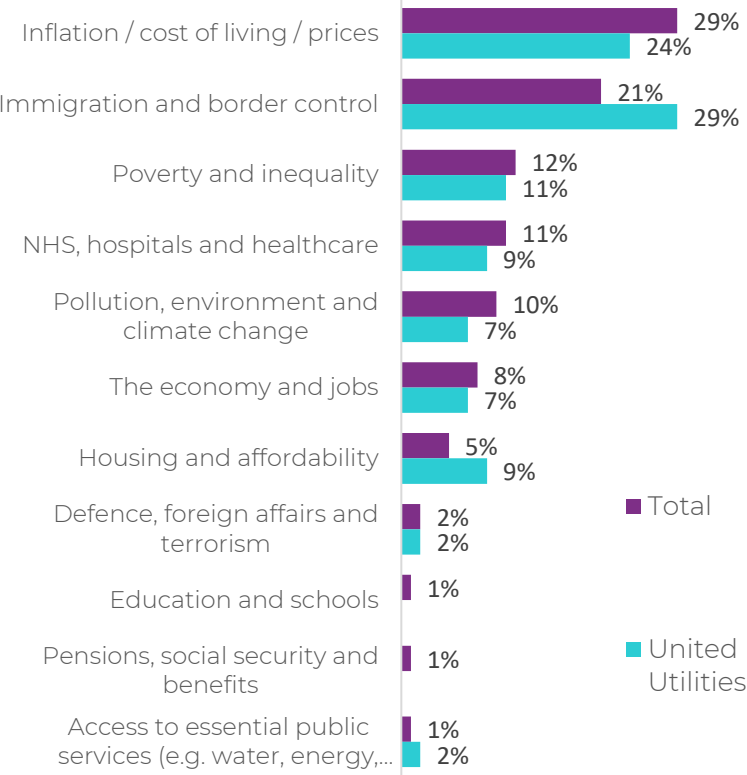


UK Issues

All Issues Facing the UK



ONE Main issue Facing the UK



United Utilities community members have told us their single biggest issue facing the UK is:

- Immigration and boarder control

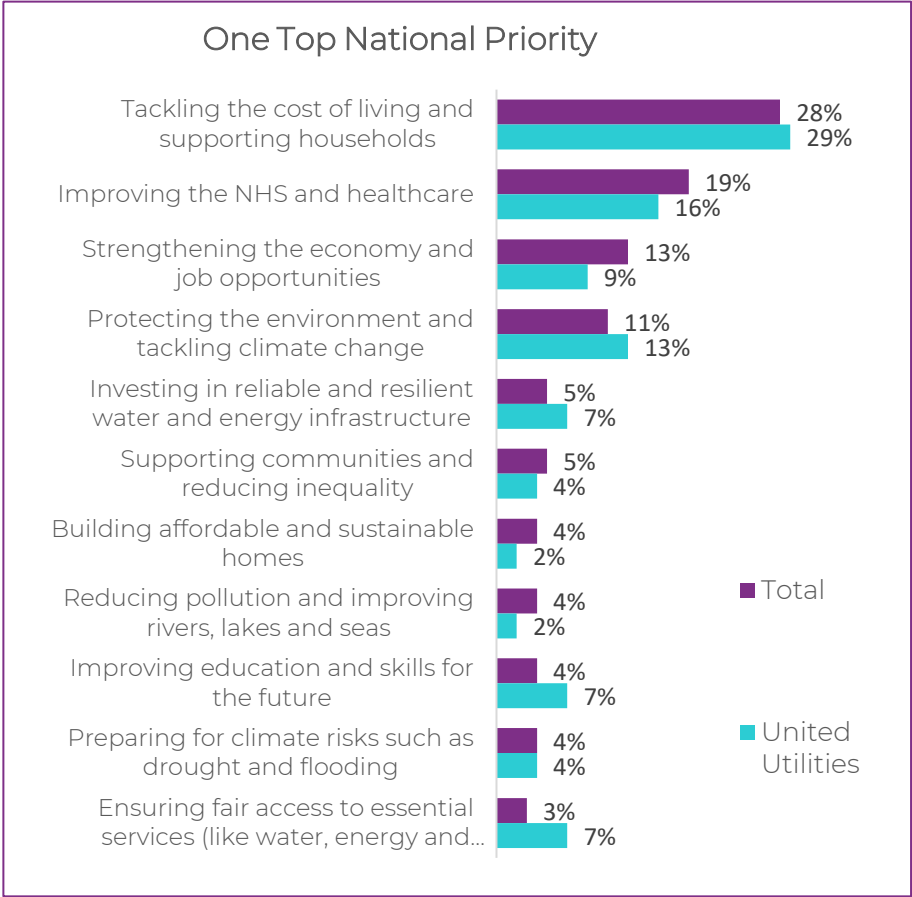
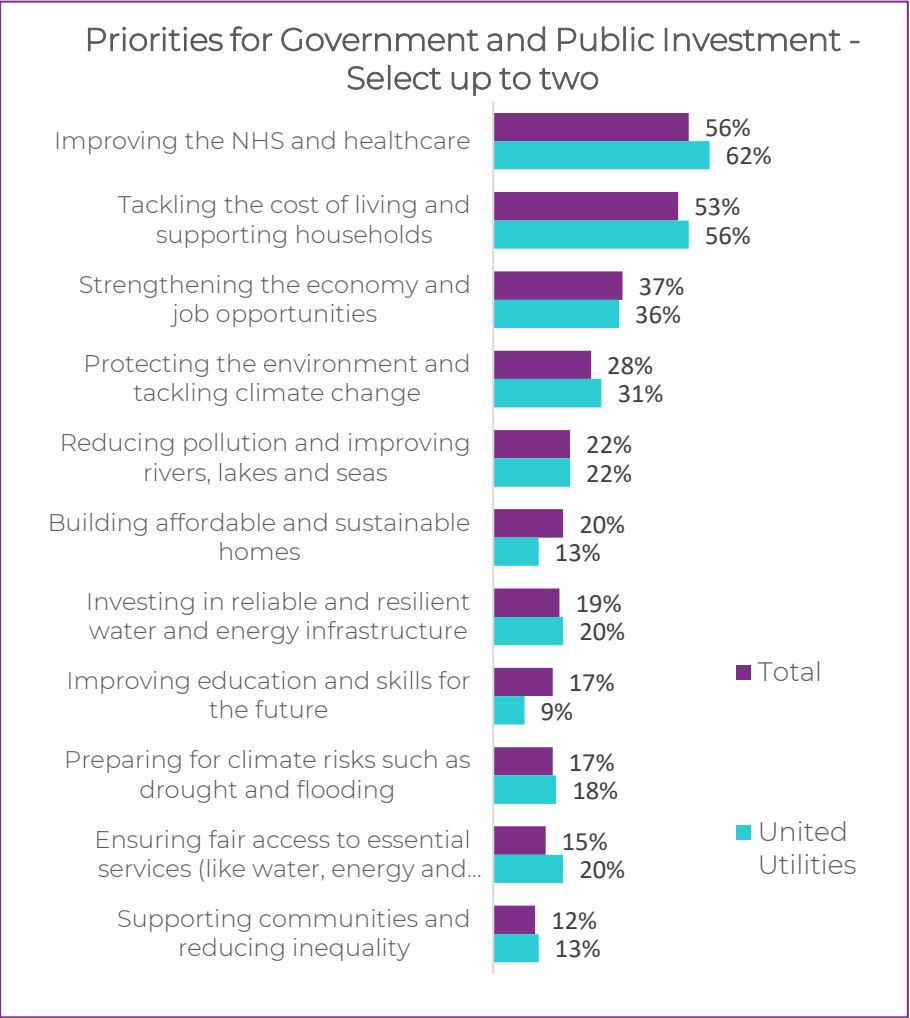
This is by a higher number than the norm (where it tanks second overall).

Inflation / cost living / prices rank as the second biggest issue facing the UK. This is slightly below the norm.

UK Priorities

United Utilities community members rank tackling the cost of living and supporting households as the top priority, followed by improving the NHS and healthcare.

United Utilities community members are more likely than the norm to see ensuring fair access to essential services as a priority for the future and less likely to see education as one.

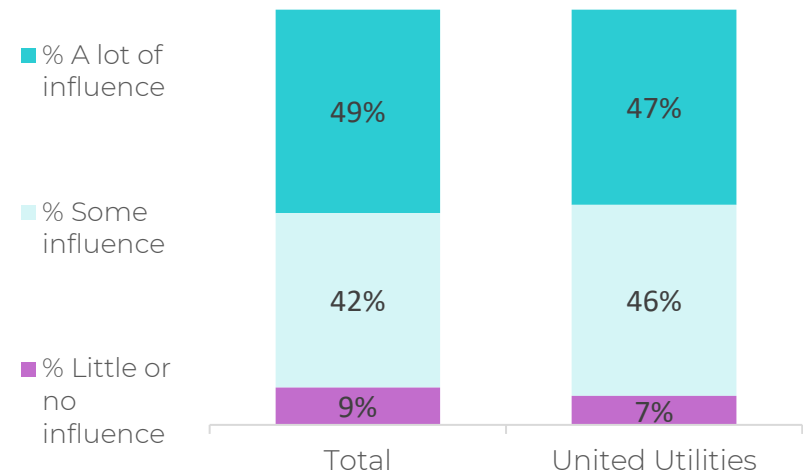


Environment Concerns

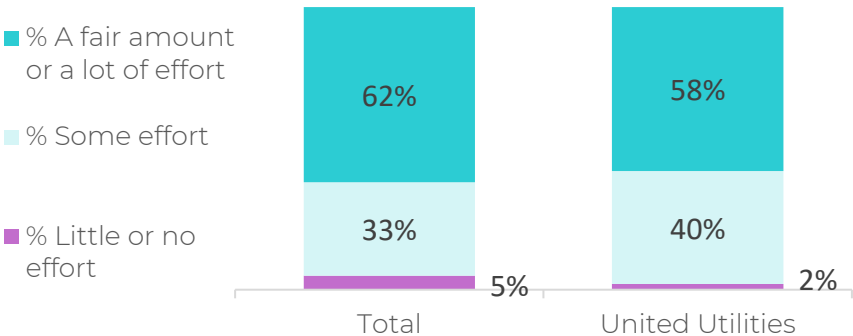
Including saving water & energy

United Utilities community members are marginally less likely to say that concern for the environment has a lot of influence on their everyday decisions, compared to the norm.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

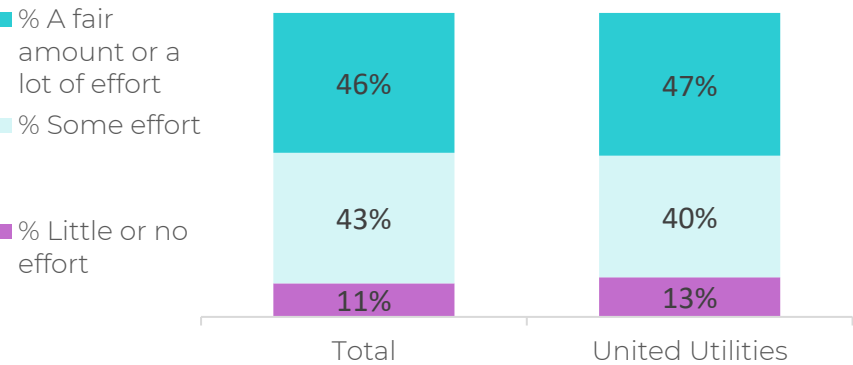


How much effort does your household make at home to save ENERGY?



58% of United Utilities community members say they make a fair amount or a great deal of effort to save energy. This is slightly below the norm.

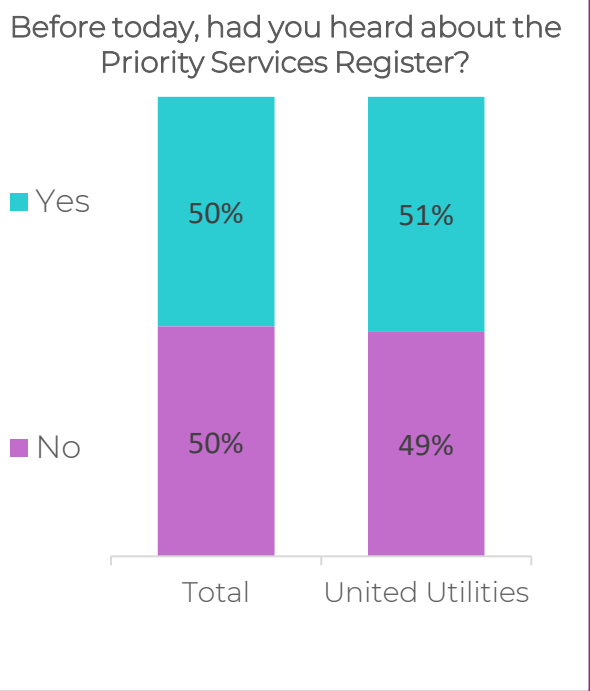
How much effort does your household make at home to save WATER?



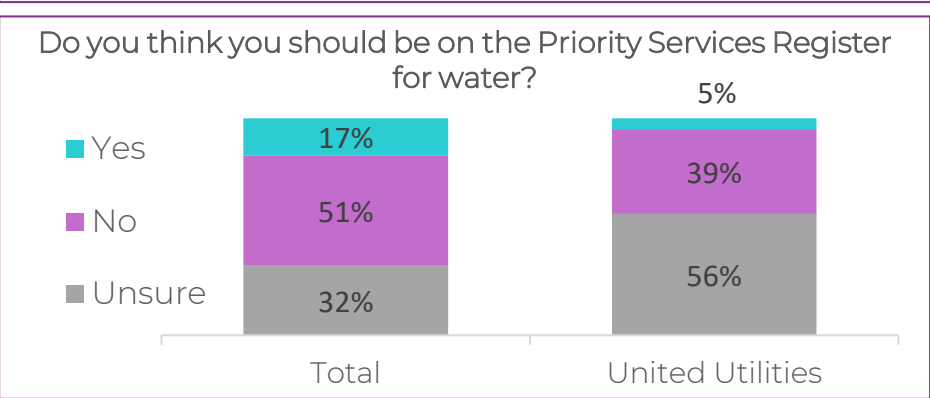
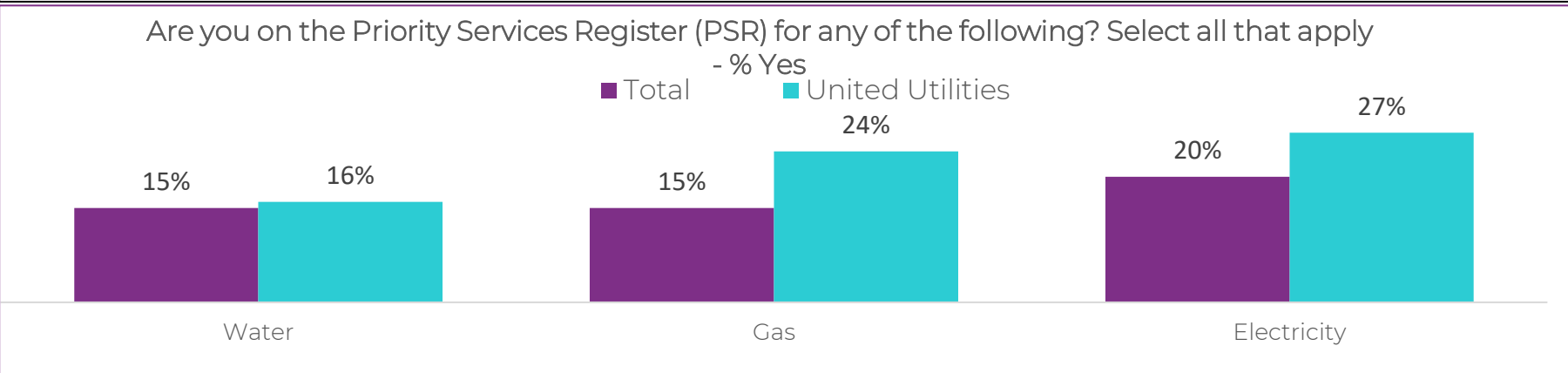
United Utilities community members are marginally more likely to say they make little or no effort to save water than the norm.

Priority Services Register

Overall, 51% of United Utilities community members say they have heard of the Priority Services Register.



A higher proportion of United Utilities community members say they are on the Priority Services Register than the norm. This is especially the case for electricity, which has the highest registration, followed by gas and water.



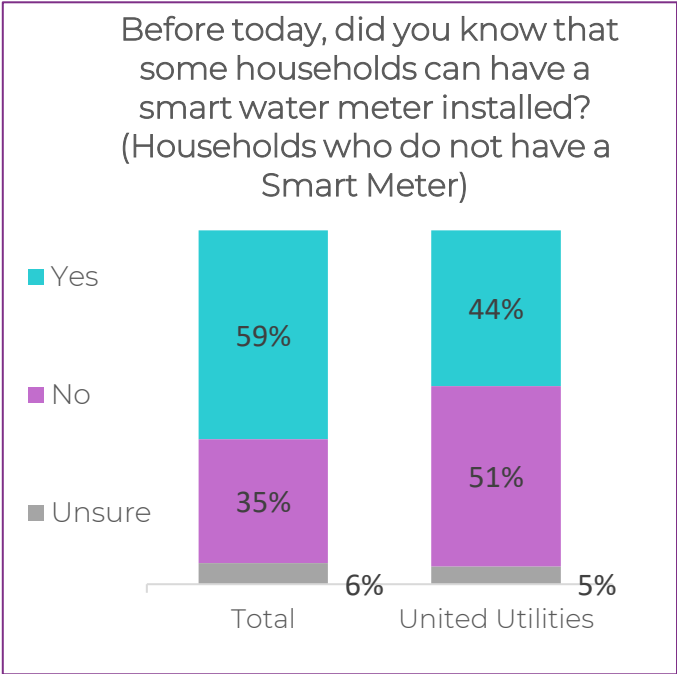
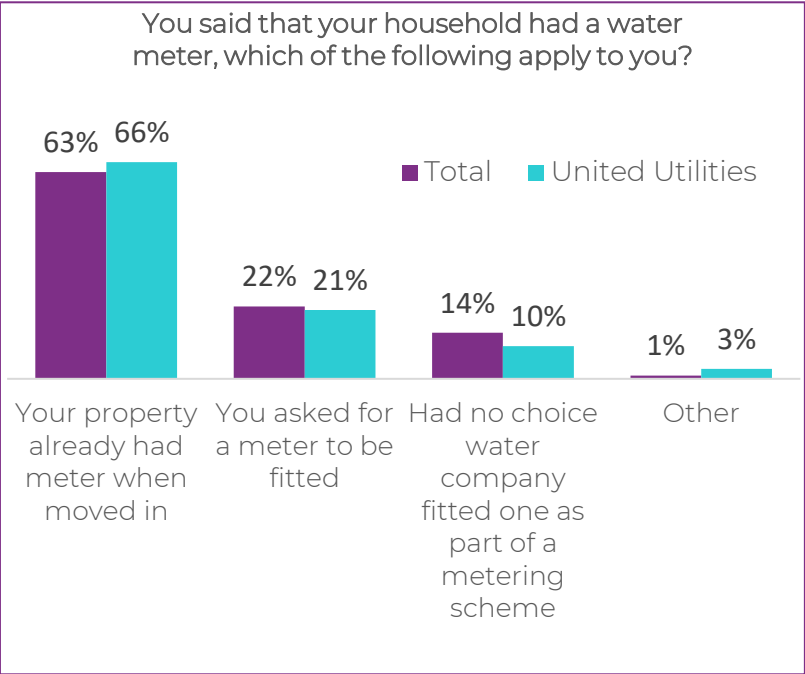
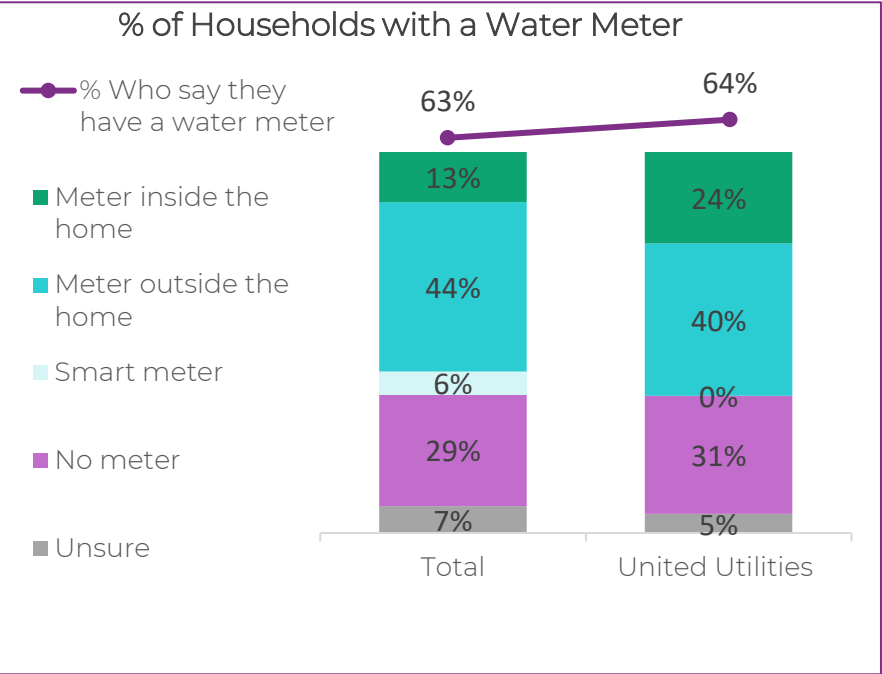
For those not currently on the Priority Services Register for water, 5% of United Utilities community members think they should be on it.

Water Meters

United Utilities community members are marginally more likely than the norm to have a water meter. Compared to the norm, they are more likely to have a meter inside the home, but less likely to have a meter outside the home. 0% reported having a smart meter.

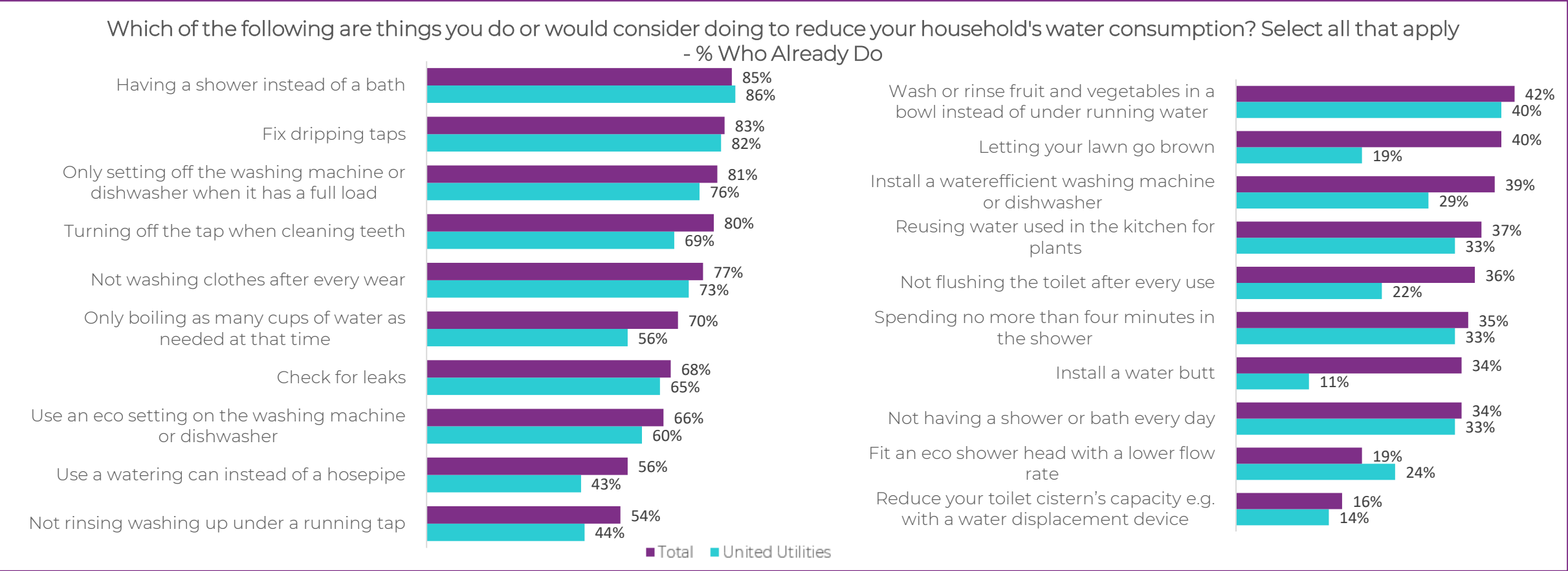
Among United Utilities community members who have a water meter, 66% already had one when they moved in. This is slightly above the norm.

51% of United Utilities community members say they do not know that households can have a smart water meter installed. This is higher than the norm.



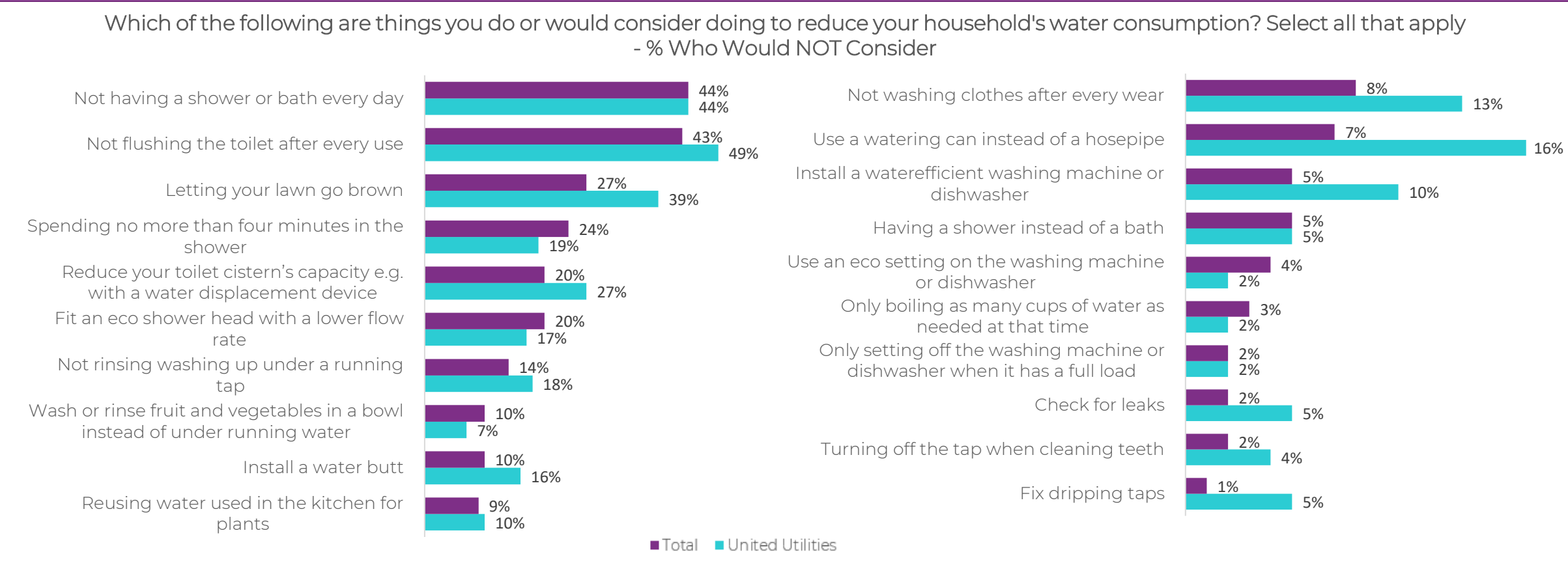
Water-Saving Measures

In line with the norm, the majority of United Utilities community members are already having a shower instead of a bath and fixing dripping taps. They are less likely to only set off the washing machine or dishwasher when it has a full load, not washing clothes after every wear, and turning off the tap when cleaning teeth compared to the norm.



Water-Saving Measures

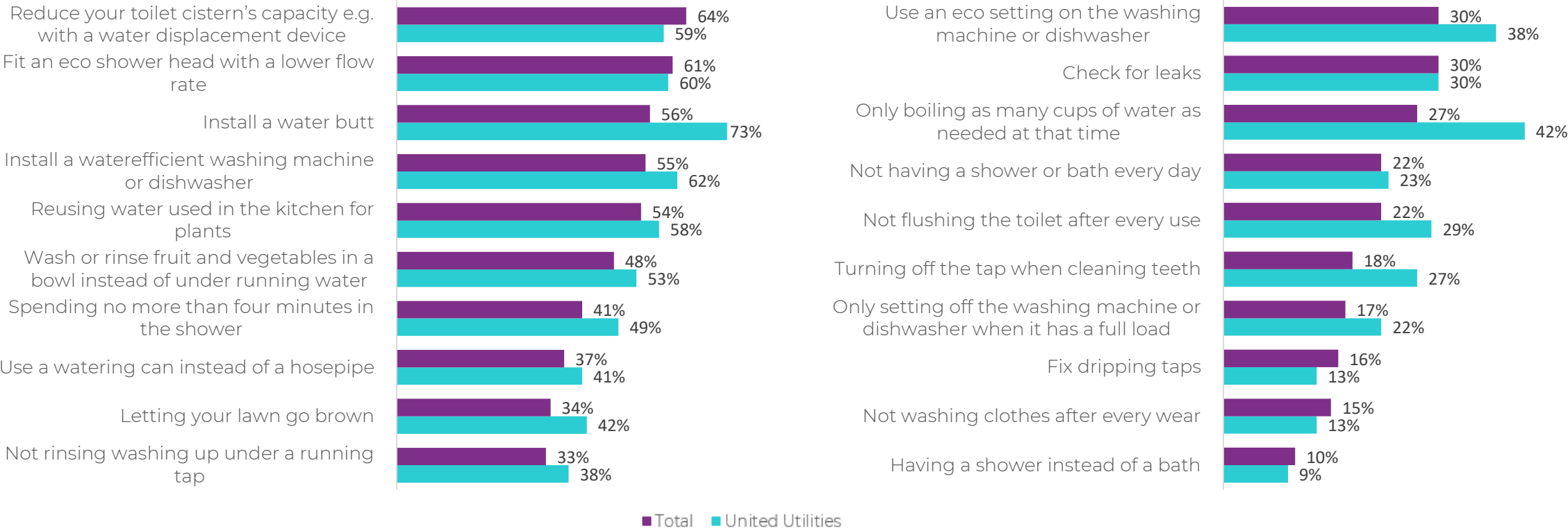
For United Utilities community members, the water-saving measures generating the greatest resistance are not flushing the toilet after every use (slightly above the norm), not having a shower or bath every day (on par with the norm), and letting your lawn go brown (above the norm).



Water-Saving Measures

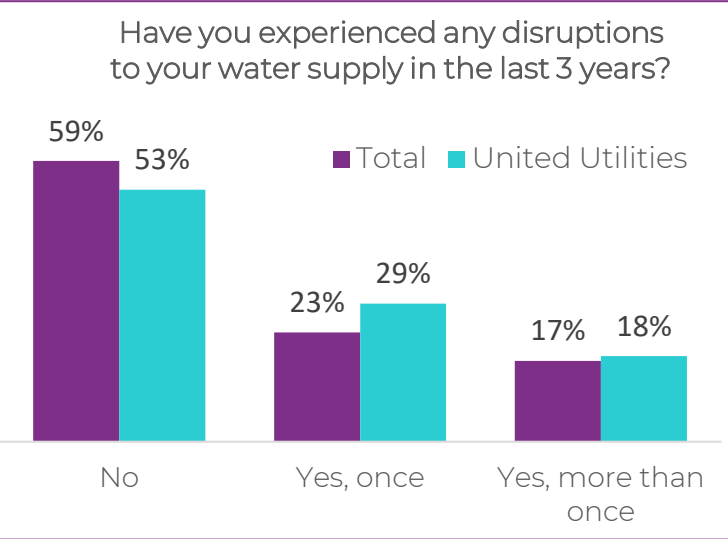
For United Utilities community members, the highest levels of openness are to installing a water butt, installing a water-efficient washing machine or dishwasher, and fitting an eco shower head.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who WOULD Consider

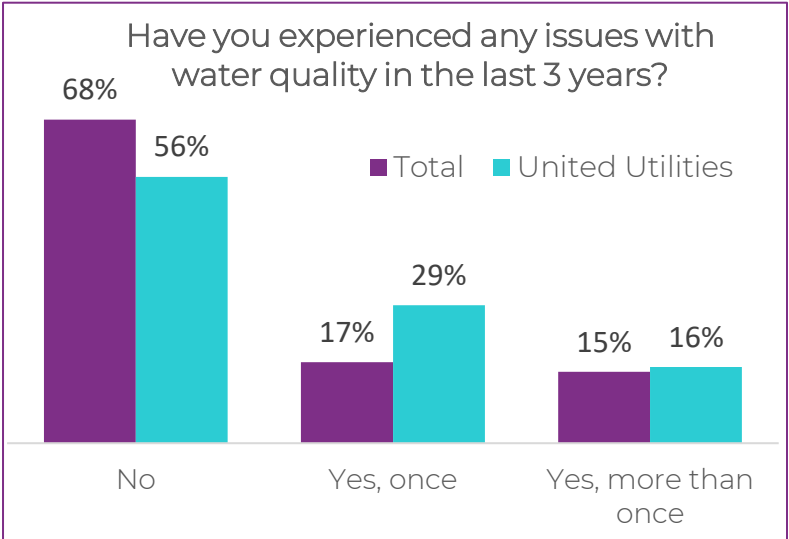


Disruptions & Issues

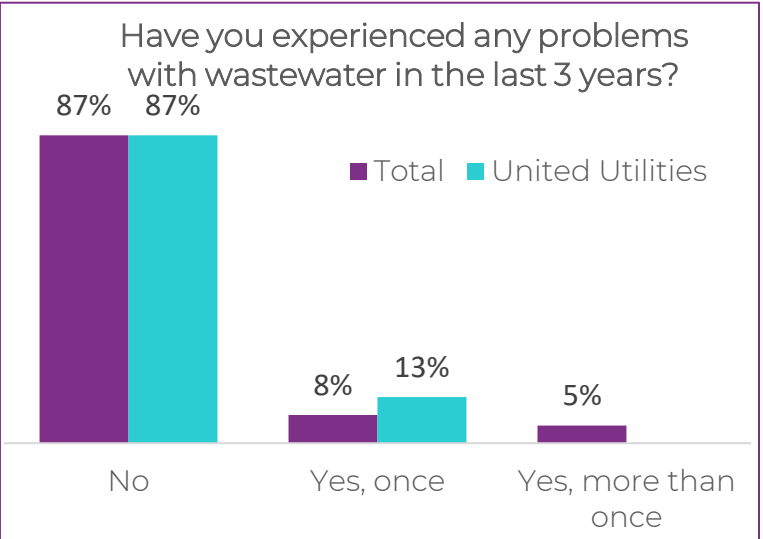
53% of United Utilities community members say they have not experienced supply disruptions in the last 3 years (slightly lower than the norm). 18% have had a disruption more than once, while 29% only once (slightly above the norm).



56% of United Utilities community members say they have had no issues with water quality in the last 3 years, below the norm. 16% have had more than one issue and 29% have had one issue (higher than the norm).

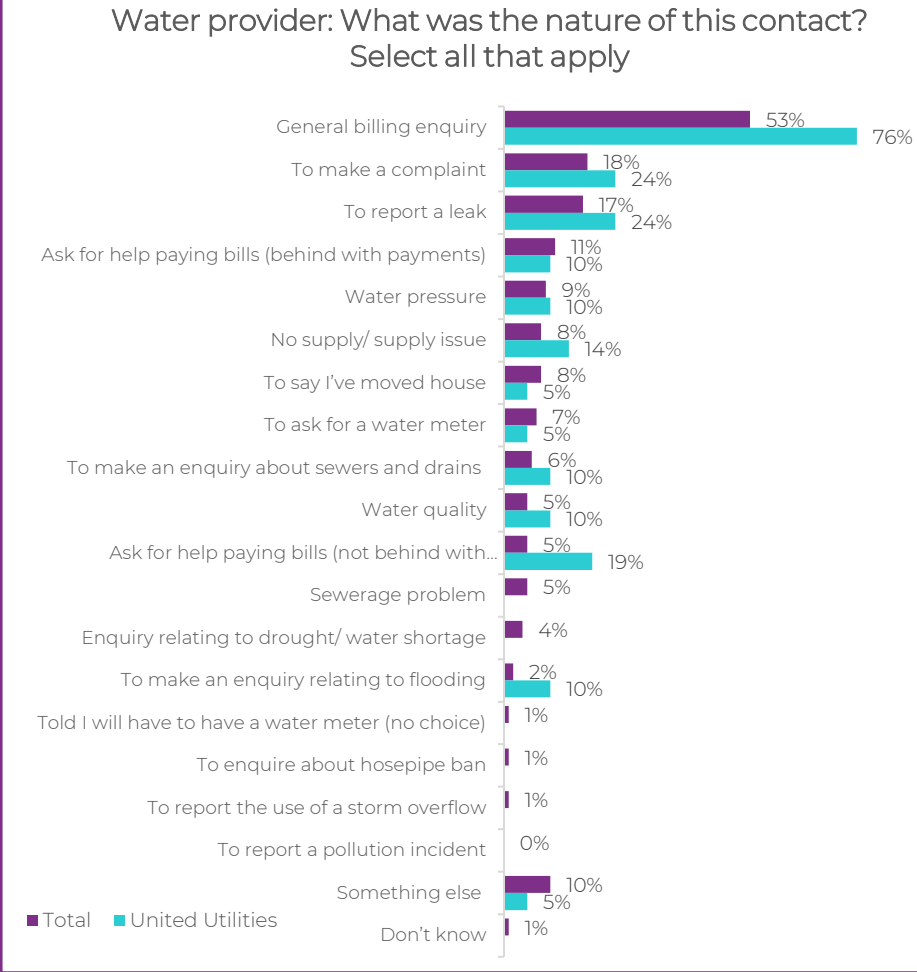
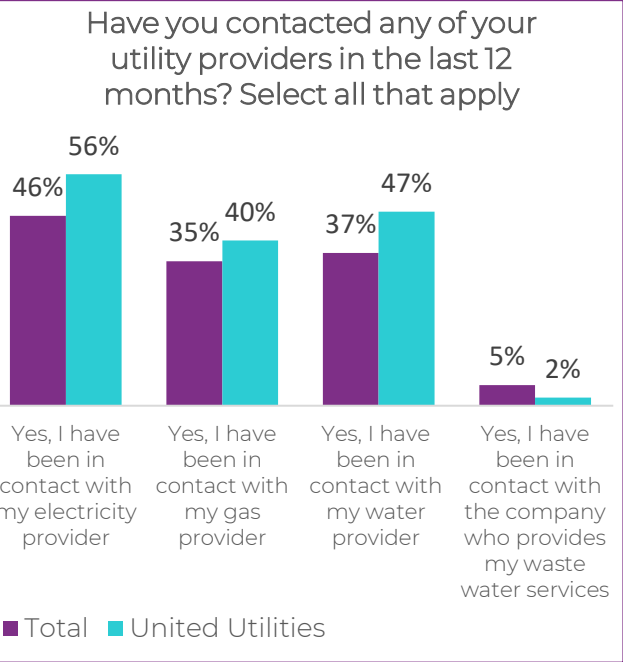


87% of United Utilities community members say they have had no problems in the last 3 years with wastewater (in line with the norm). 13% have once had an issue and 0% have had an issue more than once.

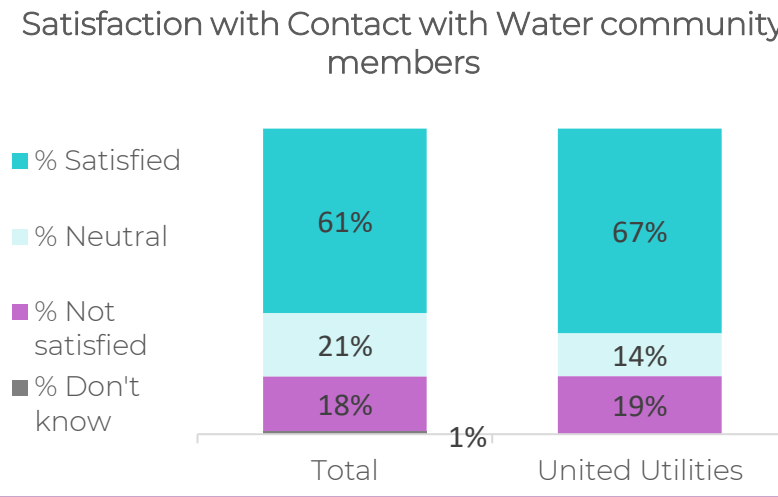


Contact with utility providers

47% of community members have been in contact with United Utilities in the last 12 months (higher than the number who have been in contact with other utility providers).

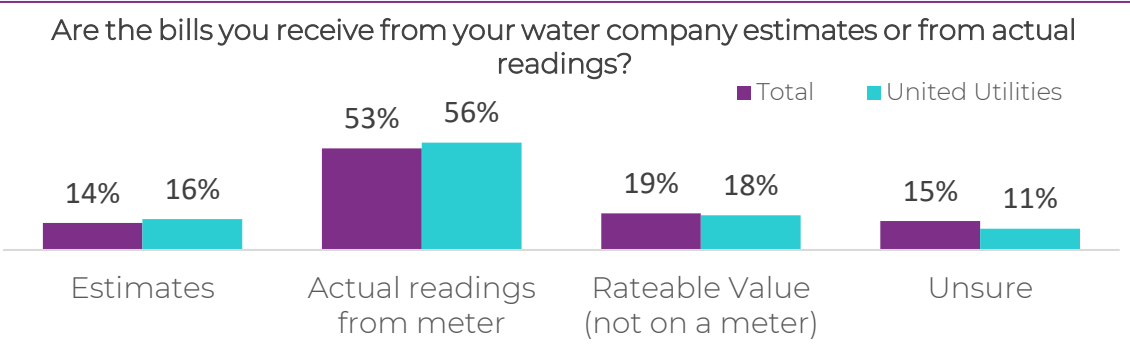


Billing enquiries are the main reason for contacting United Utilities. This is higher than the norm. Making a complaint and reporting a leak were selected by 24% of United Utilities community members who made contact, a slightly higher number compared to the norm. 67% of United Utilities community members who made contact were satisfied with that contact, higher than the norm.

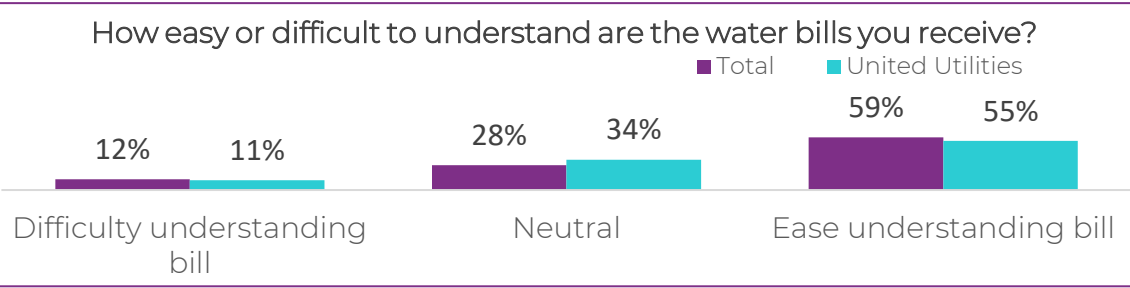


Billing

United Utilities community members are more likely than the norm to have their water bills based on actual meter readings and estimates.

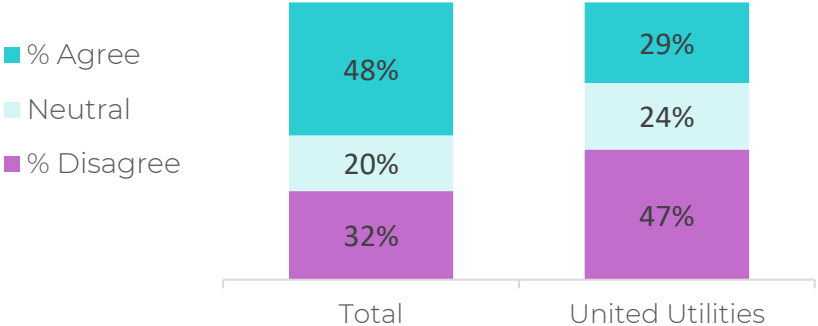


55% of United Utilities community members find it easy to understand their water bills, slightly below the norm.



How much do you agree or disagree with the following statements?

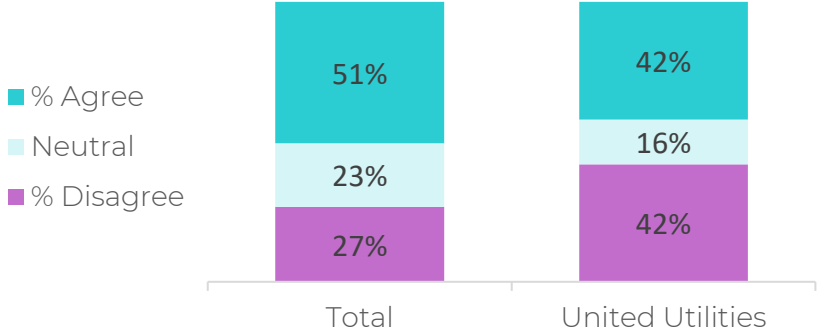
I fully understand how my water bill is calculated



29% of United Utilities community members feel they understand how their water bill is calculated. This is lower than the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



United Utilities community members are more likely than the norm to disagree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Wessex Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

Wessex Water

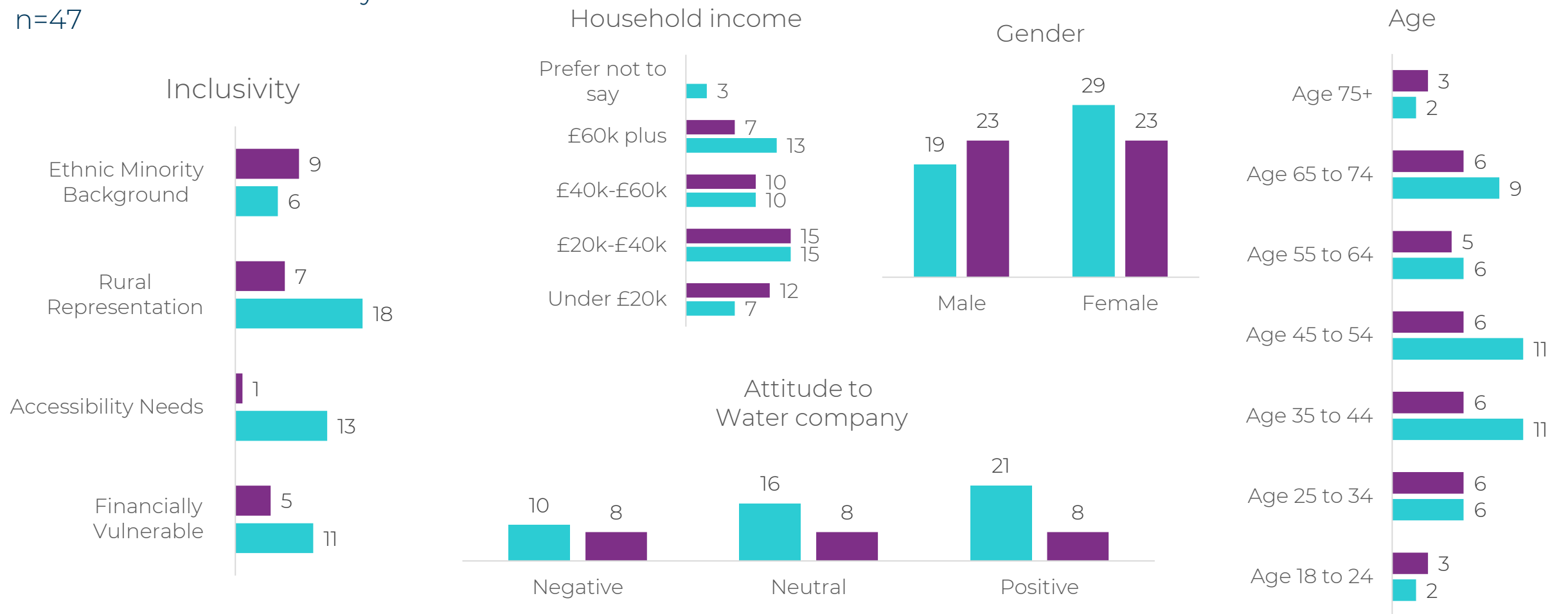
Community population

Wessex Water
YTL GROUP



The voice for water consumers
Llais defnyddwyr dŵr

Wessex Water community members:
n=47



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 we were able to reach our financially vulnerable community members 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 Male, 18-24 and 75+ sample by at least 1 for next month.

Current Quota

Minimum Quota

Wessex Water

What do Wessex Water community members hope this community achieves?

Wessex Water
YTL GROUP



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Real, tangible change:** the need for actual outcomes, not just discussion. They want to influence visible improvements in water quality.
- **Service improvements & better customer outcomes:** desire for practical improvements across the water system, better service quality and reliability, better communication and faster responses to issues.
- **Accountability & Transparency:** strong concerns about company behaviour and a need for greater transparency.
- **Environmental protection & water quality:** protecting water quality and ensuring a clean and safe supply.



What Wessex Water community members have said...

“To have my voice heard and my opinions taken into account.” Female, 65, Lives alone

“Take our views and considerations into actionable outcomes to take forward and implement into protection of this resource.” Male, 48, Lives with partner

“To hold the company accountable and raise the standard for the other members of the community.” Female, 64, Lives alone

“Bring Wessex waters attention to the consistent flood problems from the drainage.” Female, 33, Lives with child/children



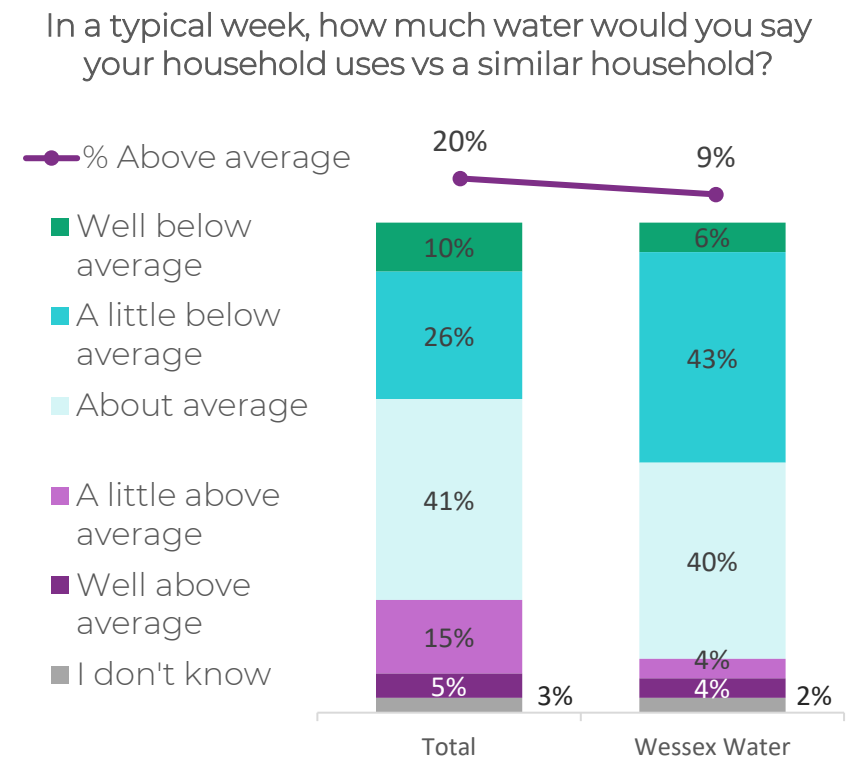
Wessex Water community members want to drive real, measurable improvements in water quality, environmental protection, customer experience, and company transparency. They expect Wessex Water to truly listen, act on feedback, be accountable for its impact, and use community members insights to shape a cleaner, fairer, and more responsive water service.

Active community members
Total Base Size: 755
Wessex Water Base Size: 47

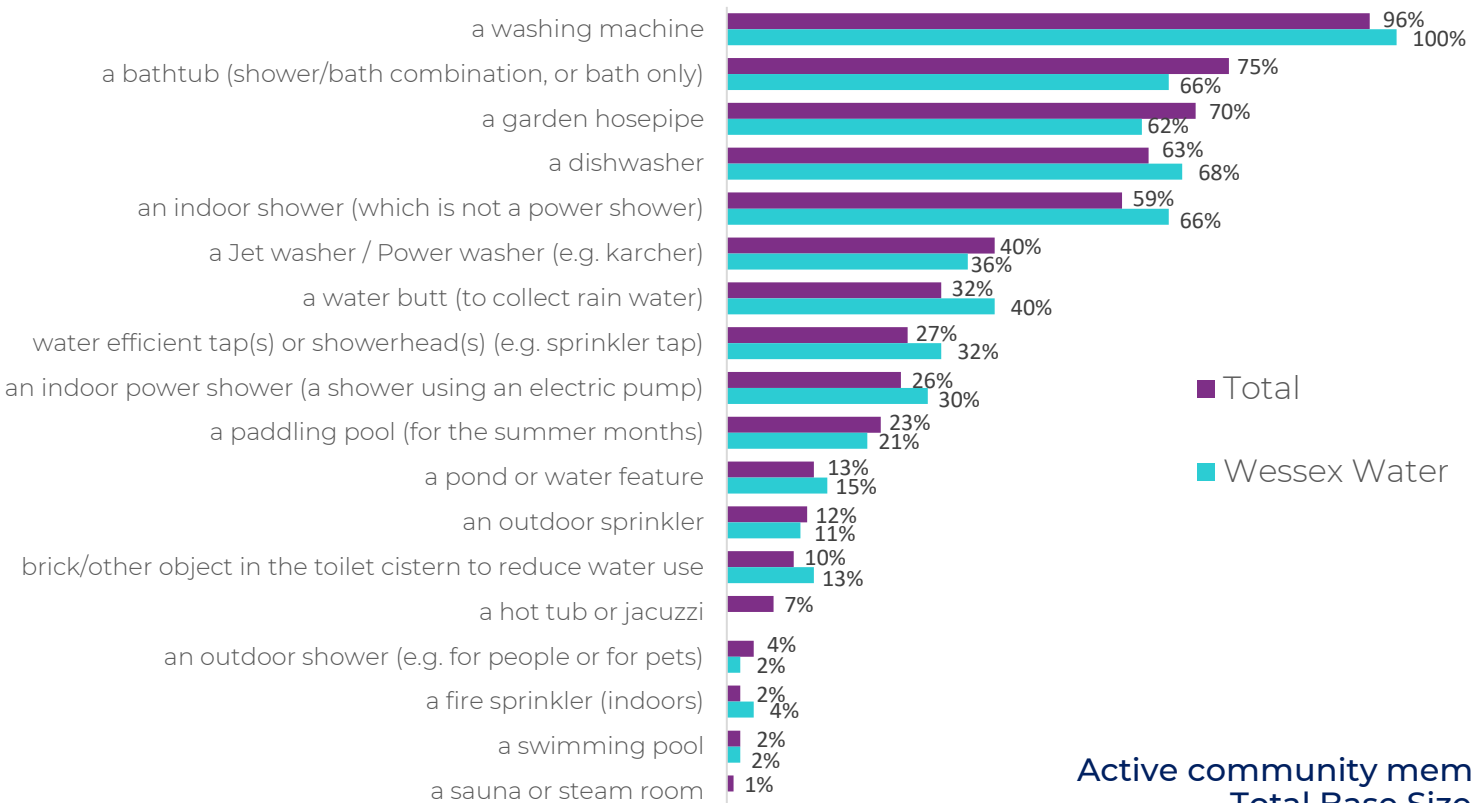
Water Use at Home

Wessex Water community members are more likely to say their household uses “below average” levels of water compared to the norm. In particular, 43% selected “a little below average” compared with 26% of the total. Only 8% selected an “above average” option.

Wessex Water community members are less likely to have a bathtub, but more likely to have an indoor shower and indoor power shower, compared to the norm. They are also more likely to have water efficient tap(s) or shower head(s).

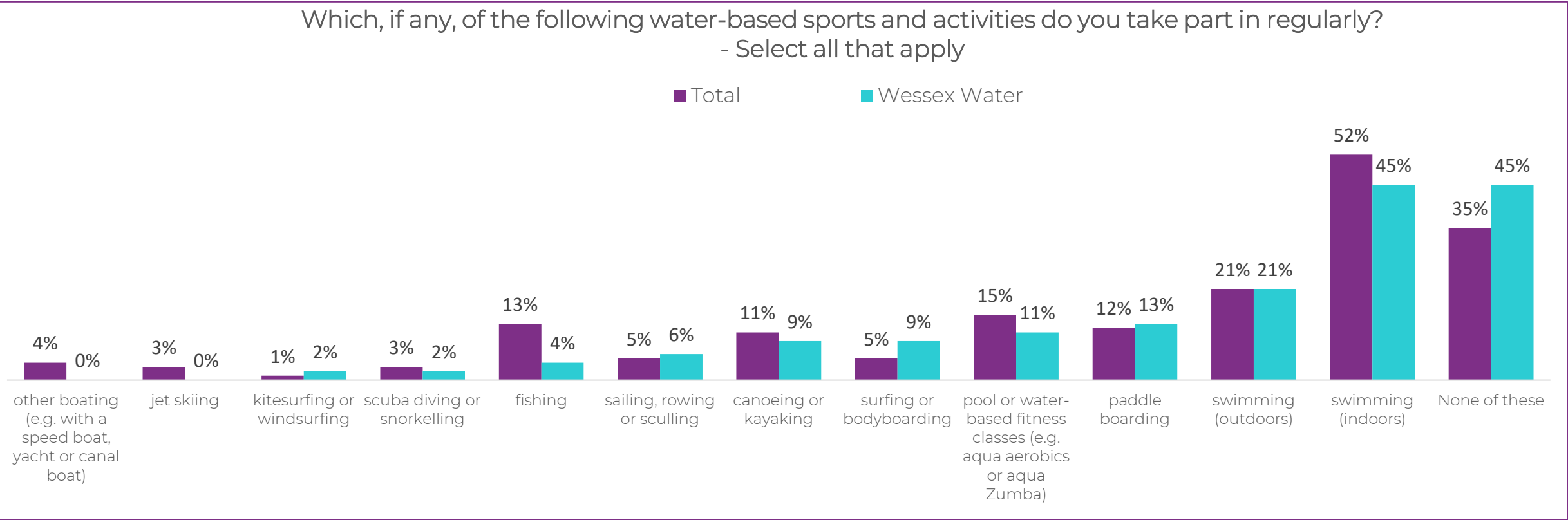


Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Water Locations & Activities

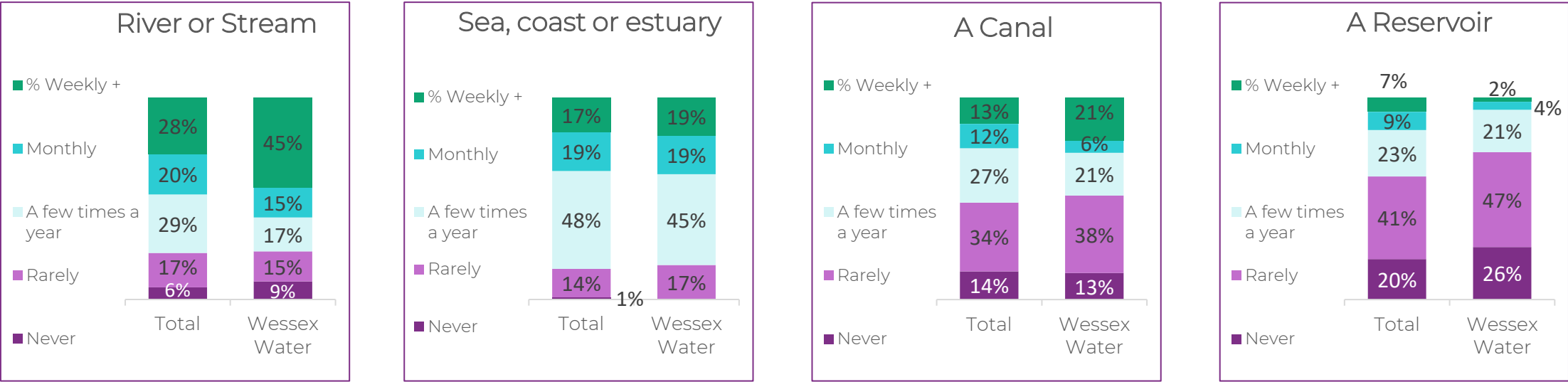
45% of Wessex Water community members do not regularly practice any of the water-based sports and activities listed. Swimming (indoors) is the most common water-based activity, followed by swimming (outdoors) and paddle boarding.



Water Locations & Activities

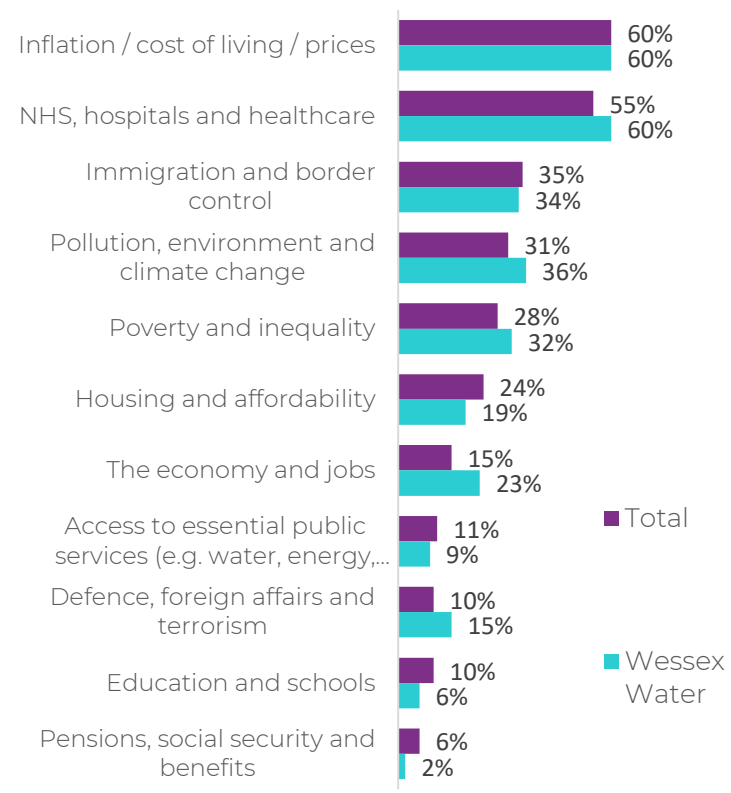
Wessex Water community members are more likely than the norm to visit rivers or streams, or canals weekly and more likely to never or rarely visit reservoirs.

How often, if at all, do you spend time by or on the water at any of these places shown below?

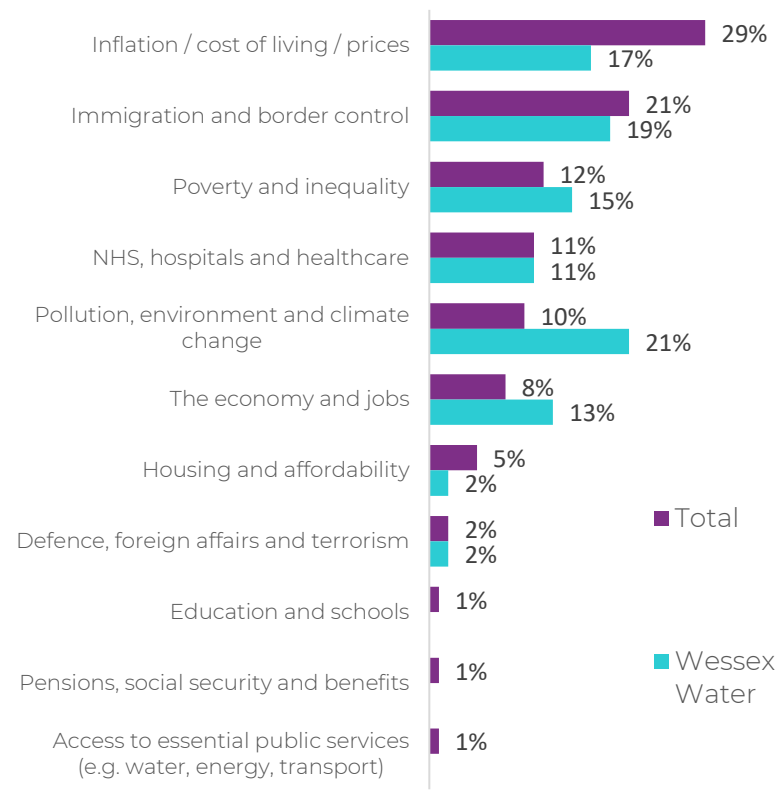


UK Issues

All Issues Facing the UK



ONE Main issue Facing the UK



Wessex Water community members have told us their top issue is:

- Pollution, environment and climate change

This is by a higher number than the norm (where it ranks fifth overall).

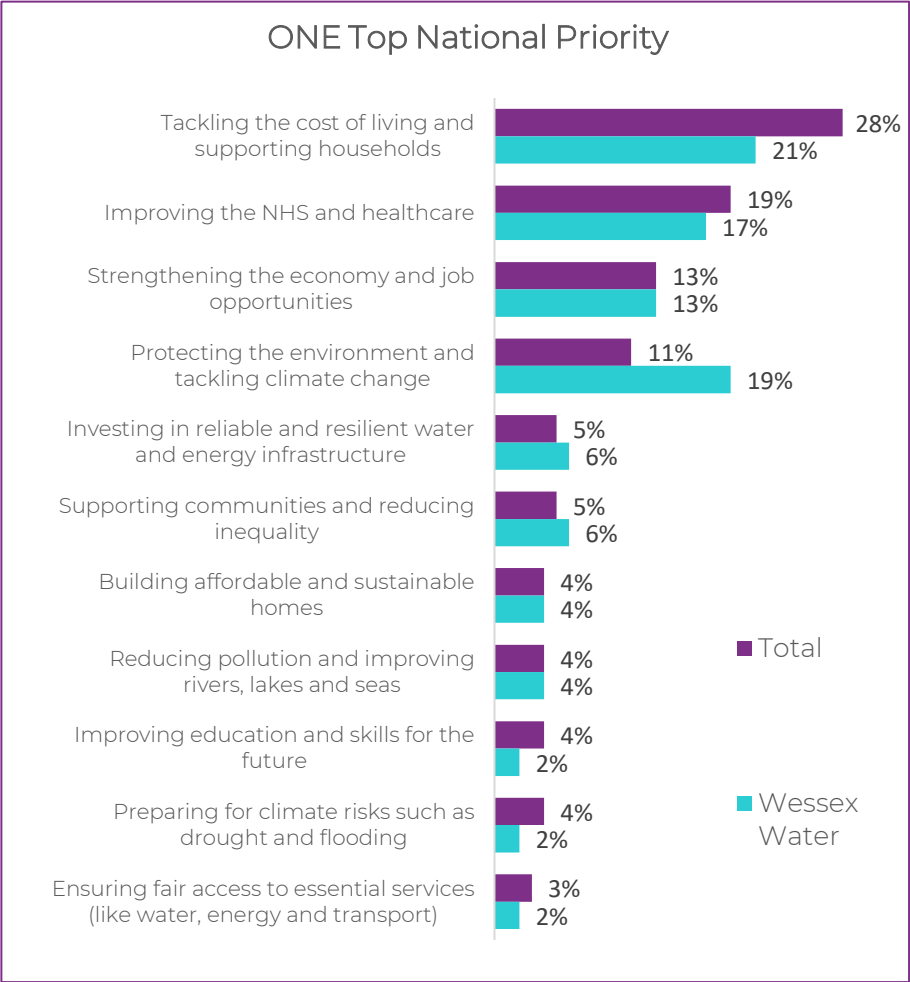
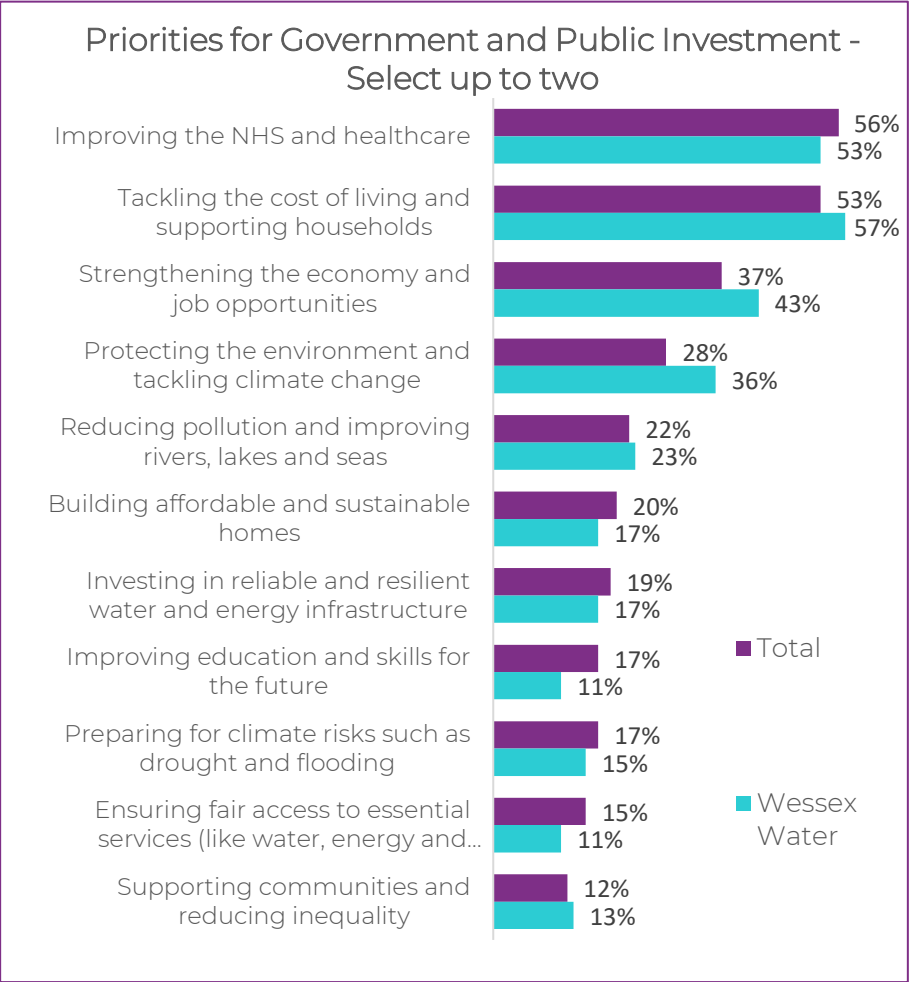
Inflation / cost of living / prices ranks fourth. Wessex Water community members are less likely to select this as their top issue compared to the norm, where it is the leading issue.

They are also more likely than the norm to see poverty and inequality and the economy and jobs as the single biggest issues in the UK.

UK Priorities

Wessex Water community members rank tackling the cost of living and supporting households as the top priority. The second top priority is protecting the environment and tackling climate change. This is by a higher number than the norm.

Wessex Water community members are also more likely than the norm to see strengthening the economy and job opportunities as a priority for the future.

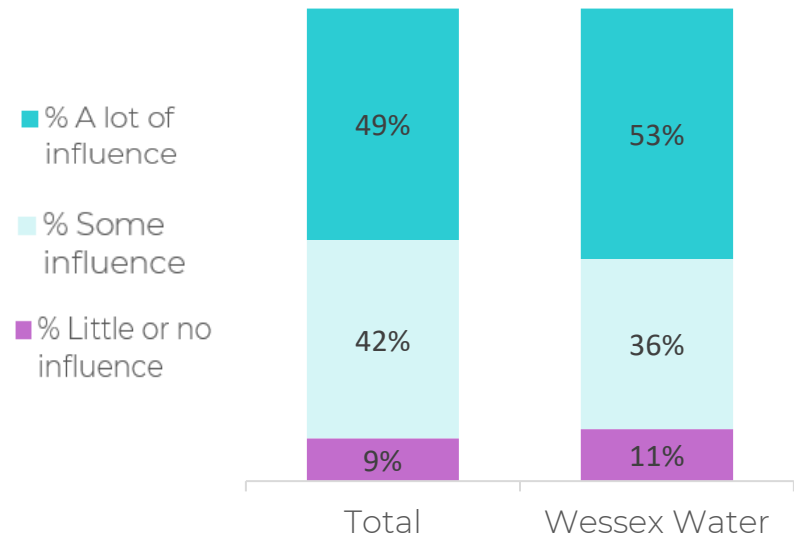


Environment Concerns

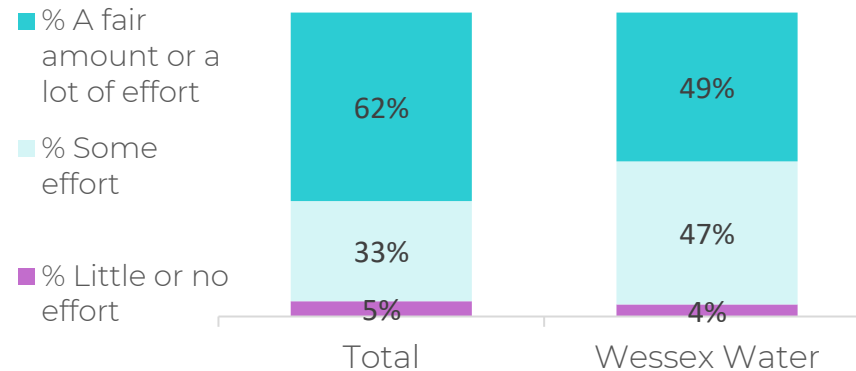
Including Saving Water & Energy

Wessex Water community members are slightly more likely to say that concern for the environment has a lot of influence on their everyday decisions compared to the norm.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

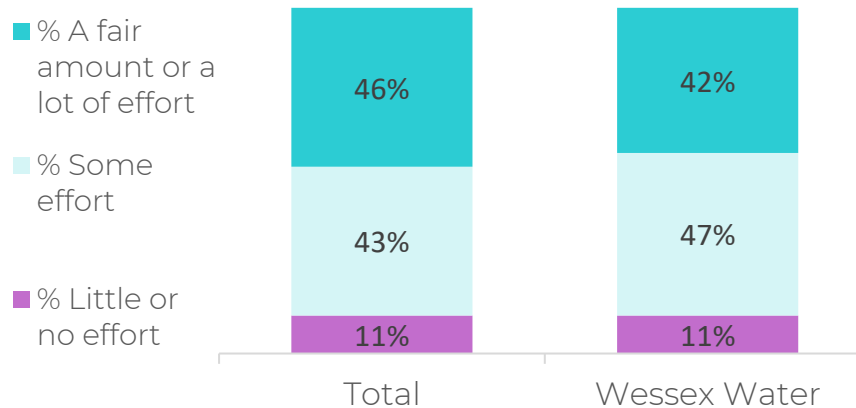


How much effort does your household make at home to save ENERGY?



49% of Wessex Water community members say they make a fair amount or a lot of effort to save energy. This is below the norm.

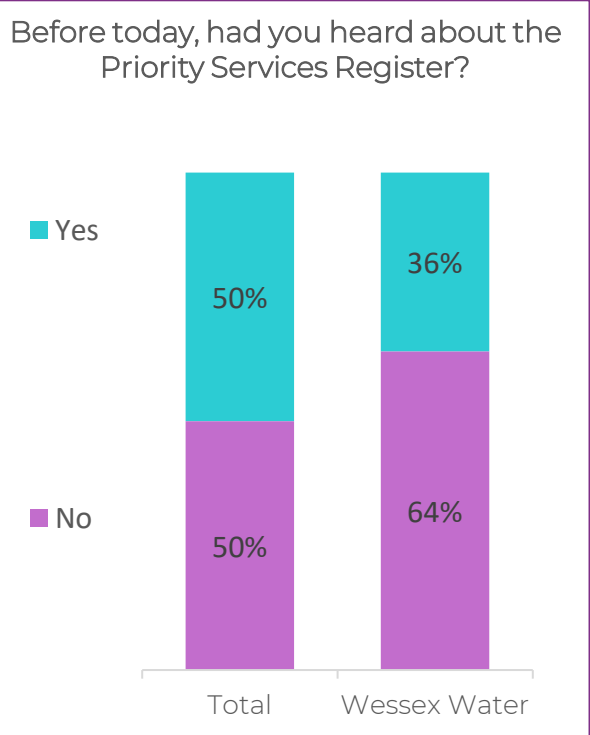
How much effort does your household make at home to save WATER?



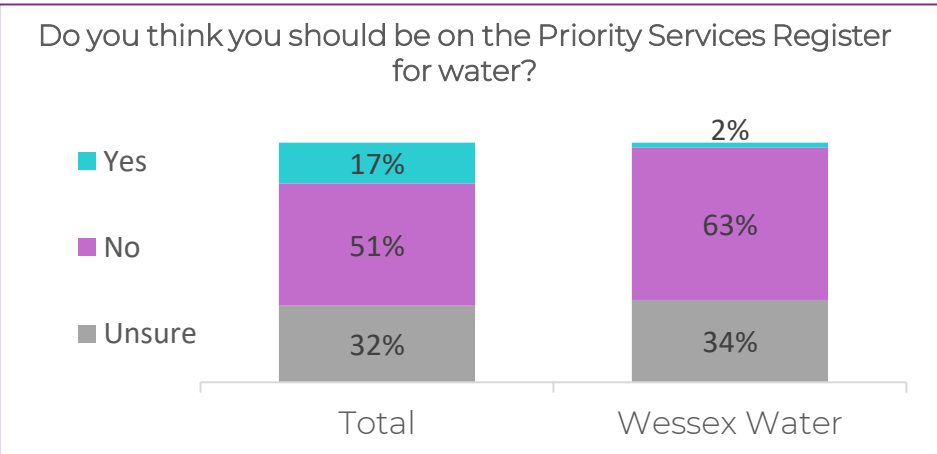
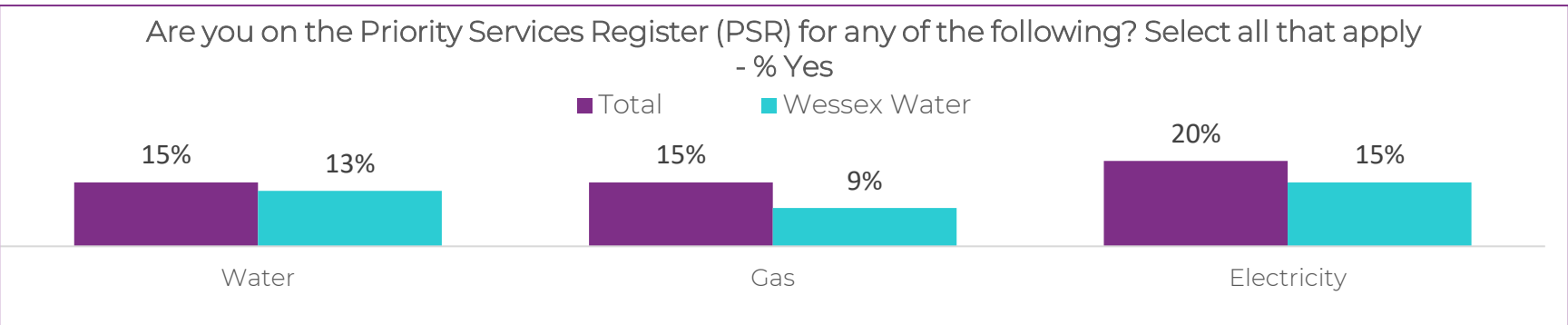
Wessex Water community members are slightly less likely to say they make a fair amount or a lot of effort to save water than the norm.

Priority Services Register

Overall, 36% of Wessex Water community members say they have heard of the Priority Services Register.



A higher proportion of Wessex Water community members say they are on the Priority Services Register for electricity than for gas or water and they are less likely to be on the registers compared to the norm.



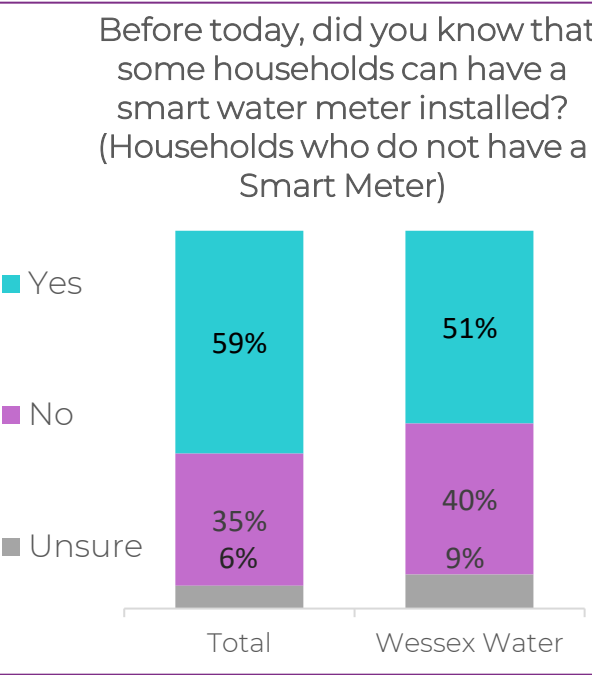
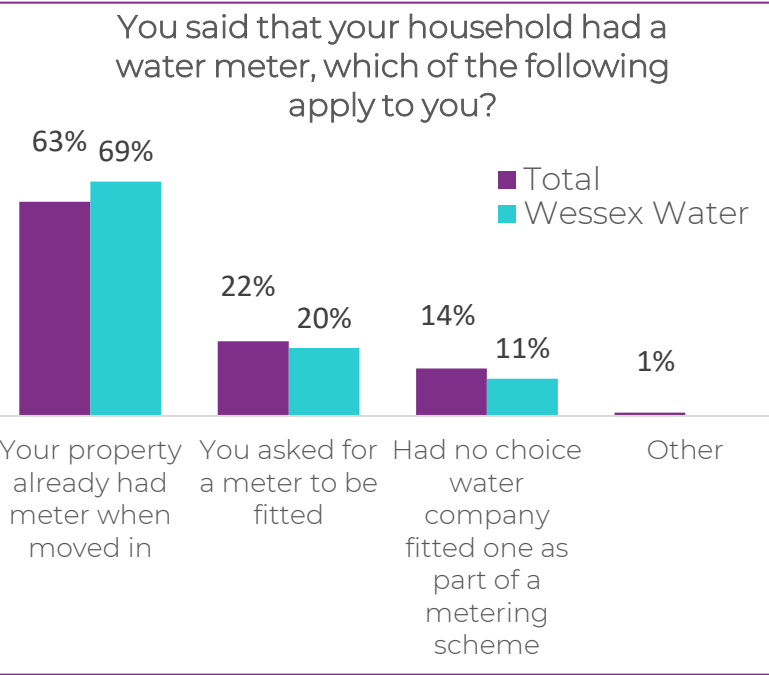
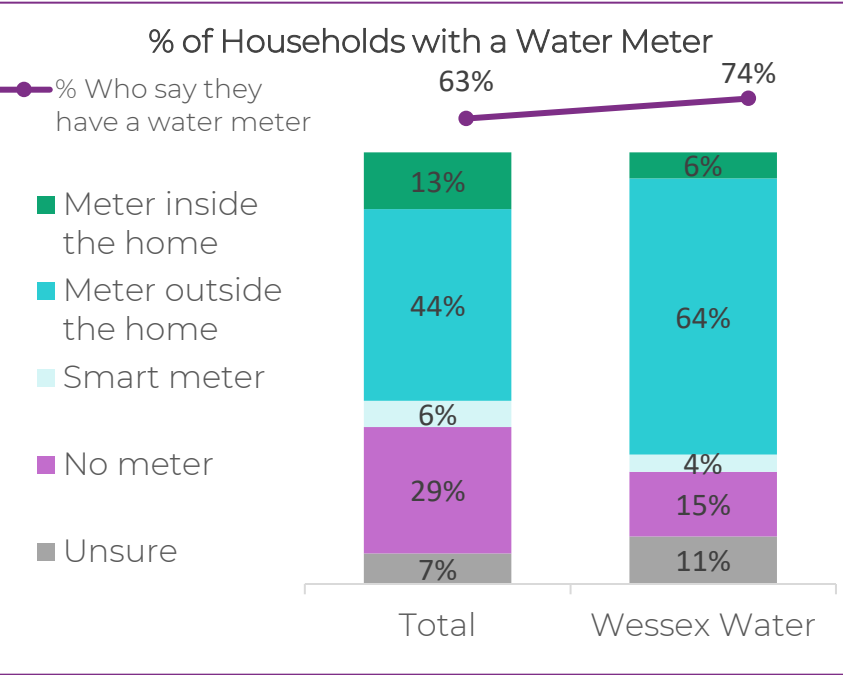
For those not currently on the Priority Services Register for water, 2% of Wessex Water community members think they should be on it.

Water Meters

Wessex Water community members are more likely than the norm to have a water meter, driven by a higher number with a meter outside the home. Compared to the norm, a lower number of Wessex Water community members have a meter inside the home and a smart meter.

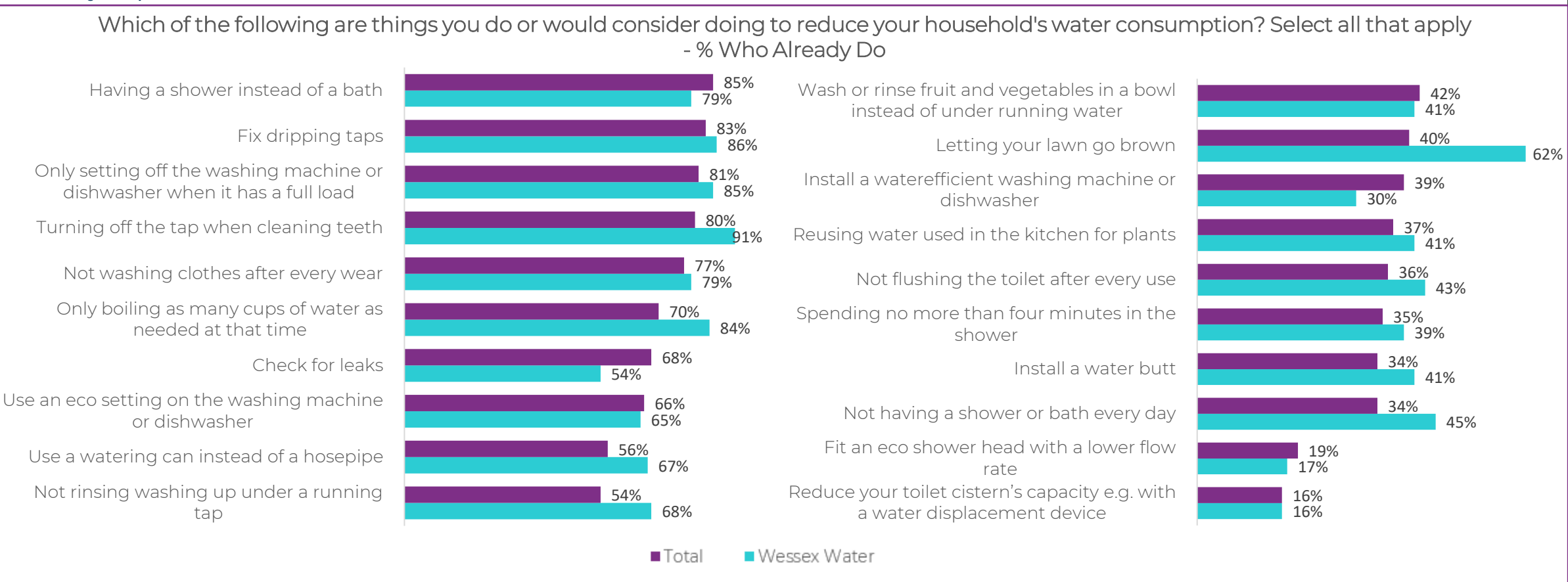
Among Wessex Water community members who have a water meter, 69% already had a meter in their property when they moved in. This is slightly higher than the norm.

51% of Wessex Water community members know that households can have a smart water meter installed (slightly below the norm).



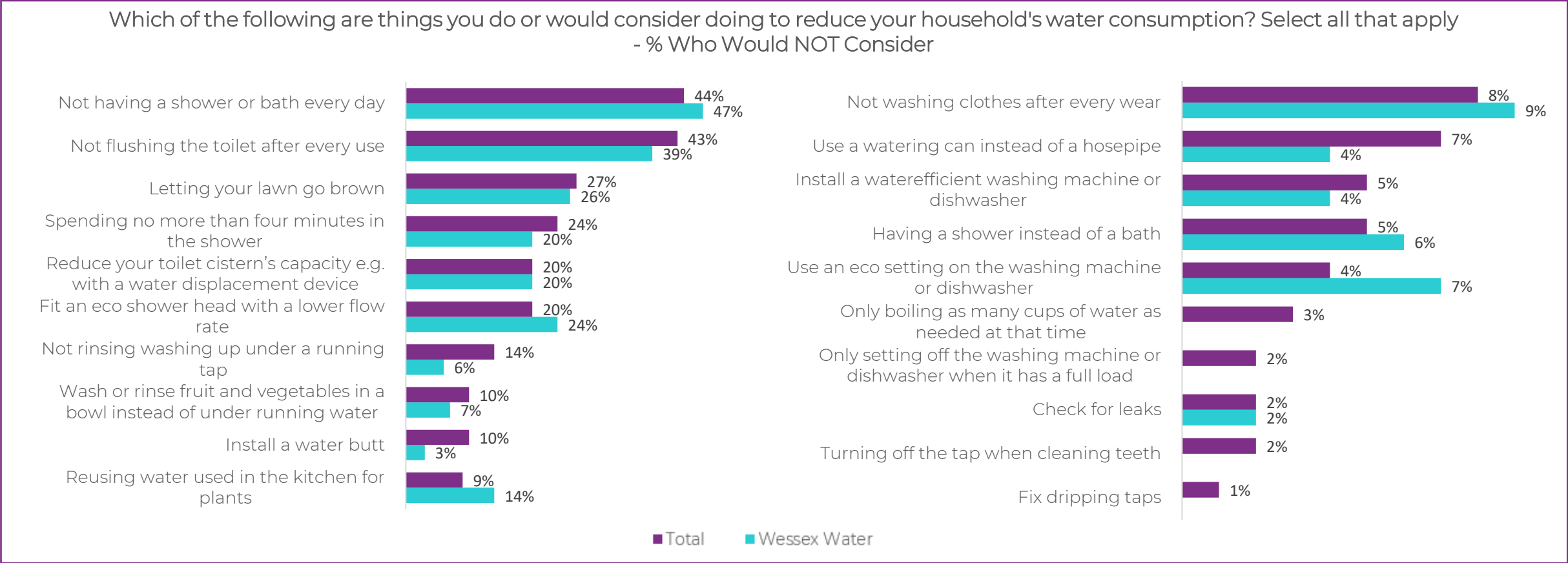
Water-Saving Measures

The majority of Wessex Water community members (and a higher number compared to the norm) are already turning off the tap when cleaning teeth, fixing dripping, only setting off the washing machine or dishwasher when it has a full load, and only boiling as many cups of water as needed at the time.



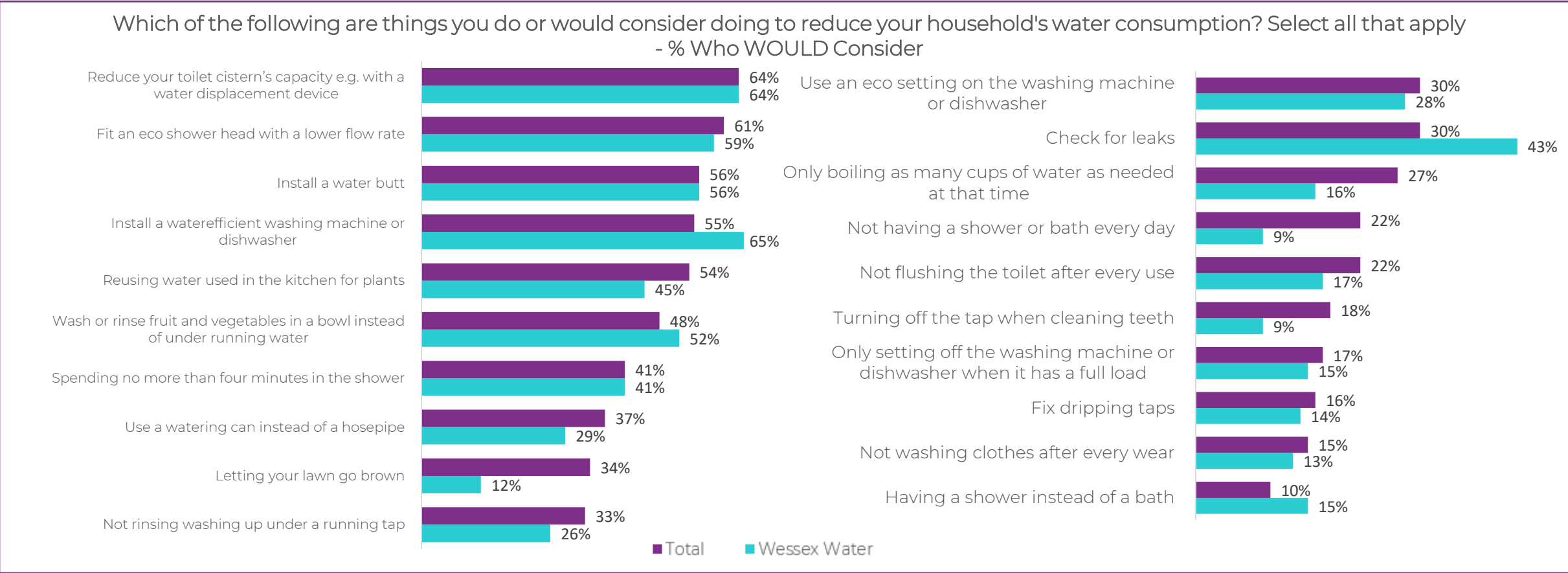
Water-Saving Measures

For Wessex Water community members, the water-saving measure generating the greatest resistance is not having a shower or bath every day. This is by a higher number than the norm. Not flushing the toilet after every use and letting your lawn go brown follow.



Water-Saving Measures

For Wessex Water community members, the highest levels of openness are to installing a water-efficient washing machine or dishwasher, reducing your toilet cistern’s capacity, and fitting an eco shower head.

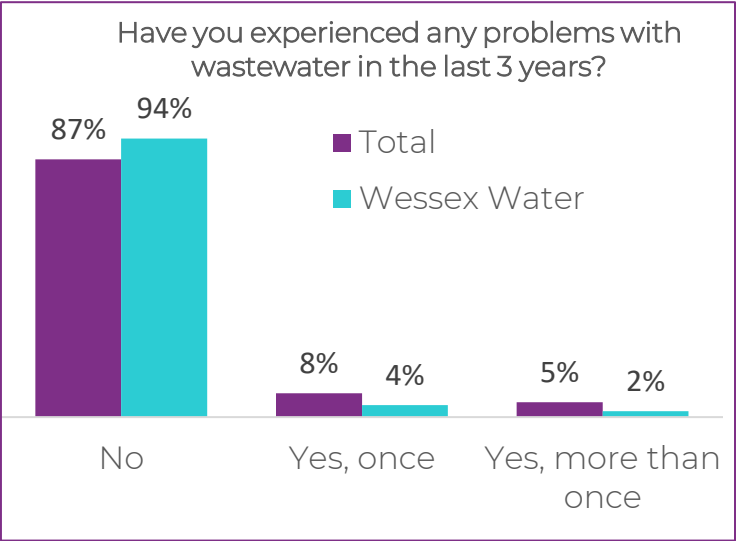
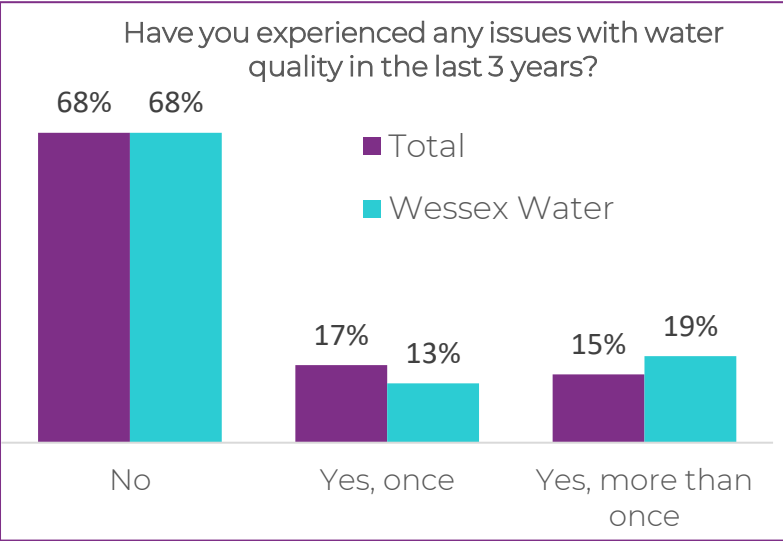
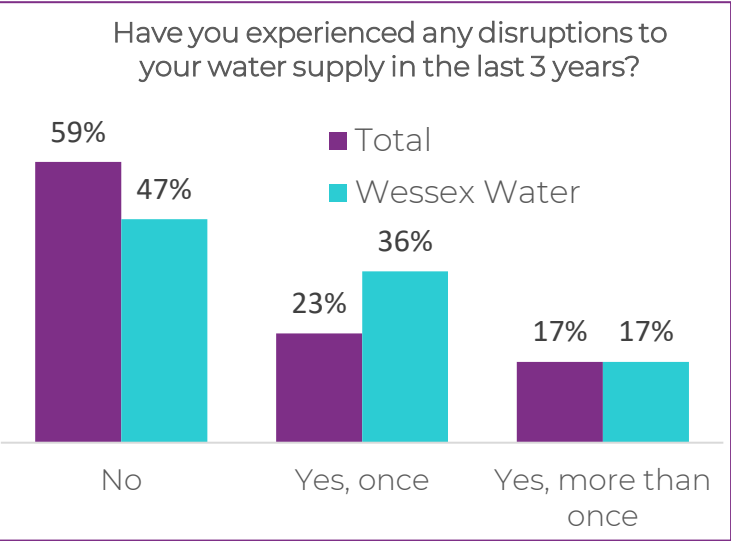


Disruptions & Issues

47% of Wessex Water community members have not experienced supply disruptions in the last 3 years (lower than the norm). 17% have had a disruption more than once and 36% had one disruption (above the norm).

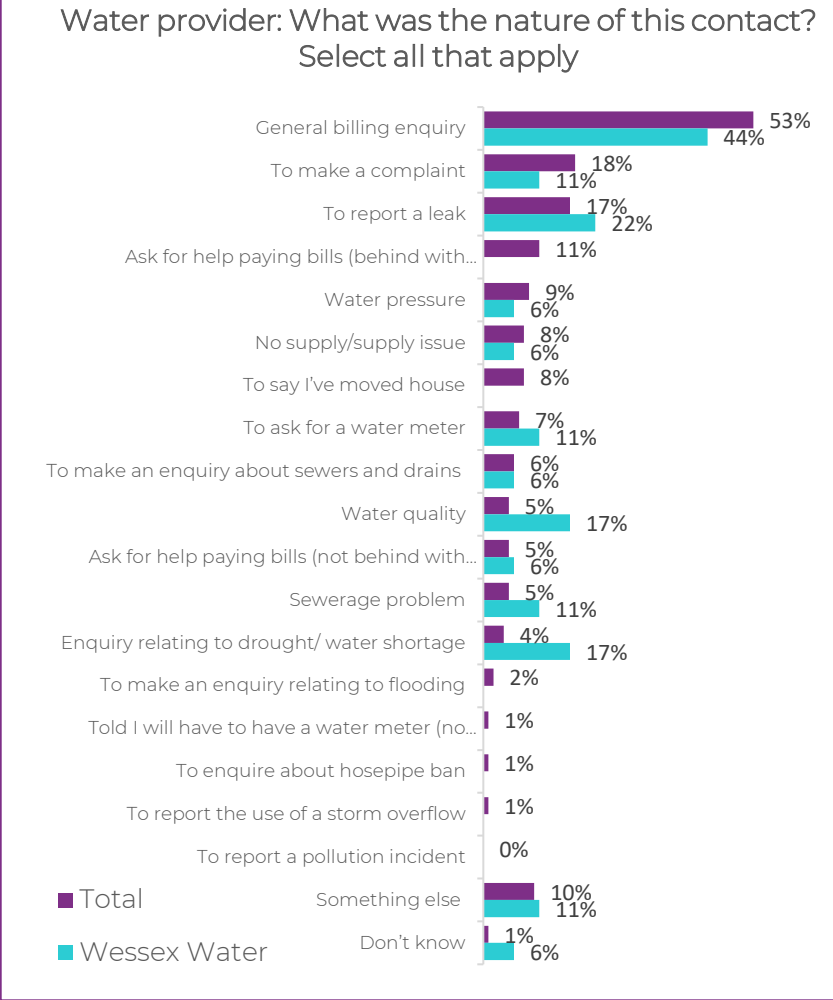
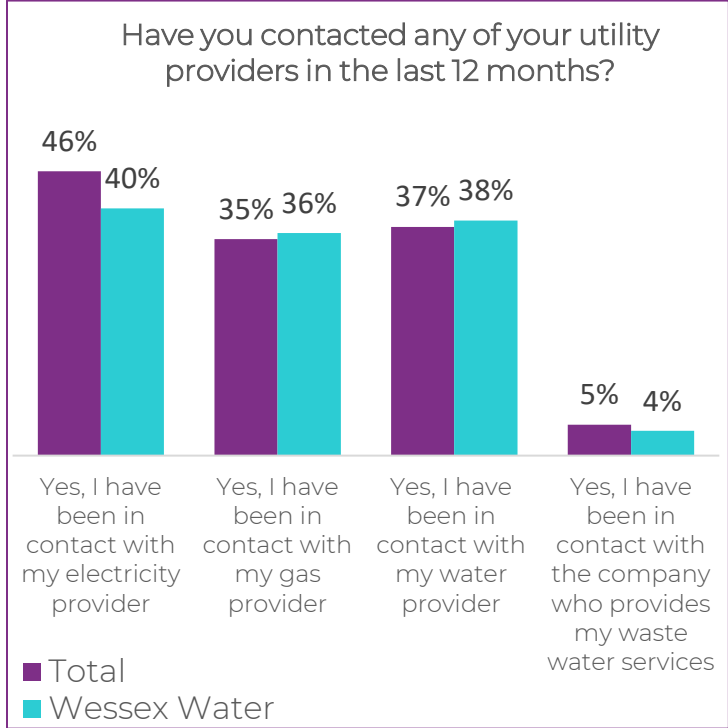
68% of Wessex Water community members have had no issues with water quality in the last 3 years, on a par with the norm. 13% have had one issue and 19% more than one issue.

94% of Wessex Water community members have had no problems in the last 3 years with wastewater (above the norm). 4% have once had an issue and 2% have had an issue more than once (below the norm).

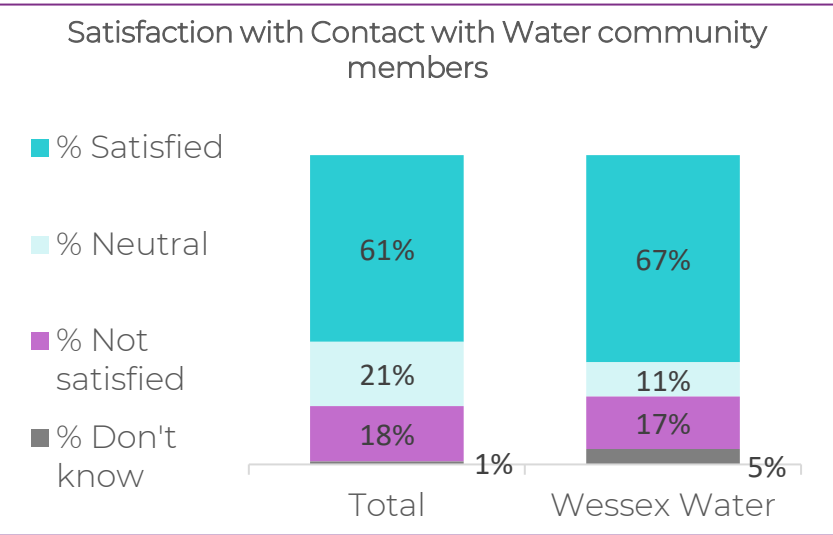


Contact with utility providers

38% of community members have been in contact with Wessex Water in the last 12 months (in line with the norm).

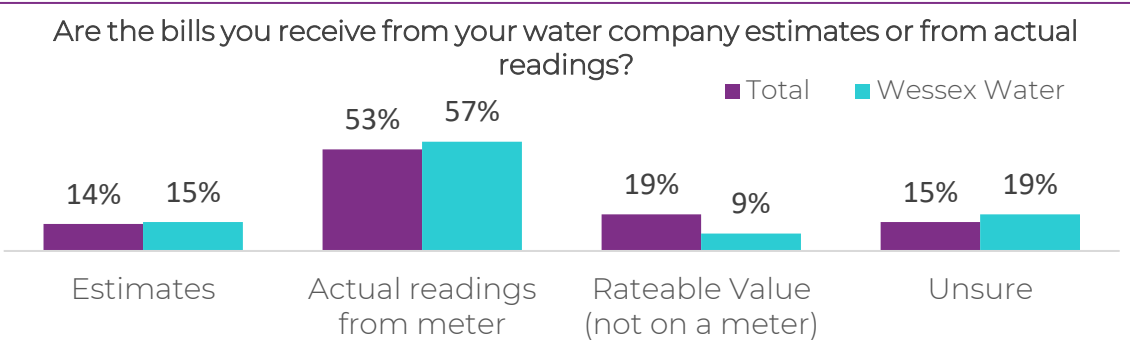


Billing enquiries are the main reason for contacting Wessex Water, though this is by a lower number than the norm. Reporting a leak was selected by 22% of Wessex Water community members who made contact, a slightly higher number compared to the norm of 17%. 67% of Wessex Water community members who made contact were satisfied with that contact. This is higher than the norm.

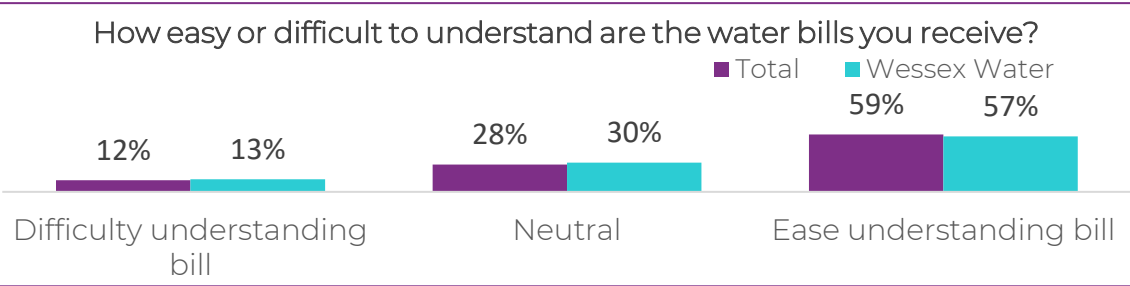


Billing

Wessex Water community members are more likely than the norm to have their water bills based on actual meter readings and much less likely to have rateable value as the base.

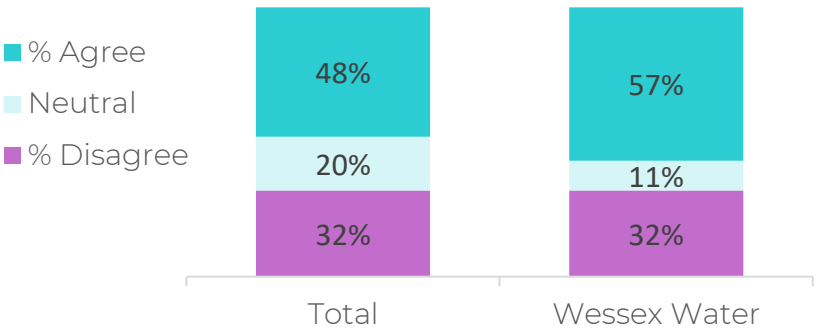


57% of Wessex Water community members find it easy to understand their water bills, marginally below the norm.



How much do you agree or disagree with the following statements?

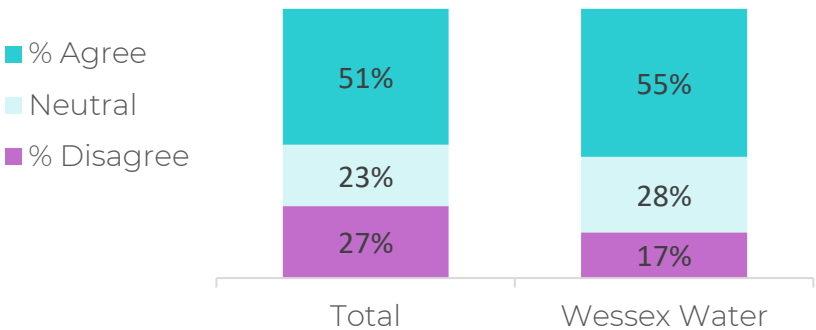
I fully understand how my water bill is calculated



57% of Wessex Water community members feel they understand how their water bill is calculated. This is higher than the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



Wessex Water community members are slightly more likely than the norm to agree that their water bills are affordable and to feel neutral about their bills' affordability.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Yorkshire Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

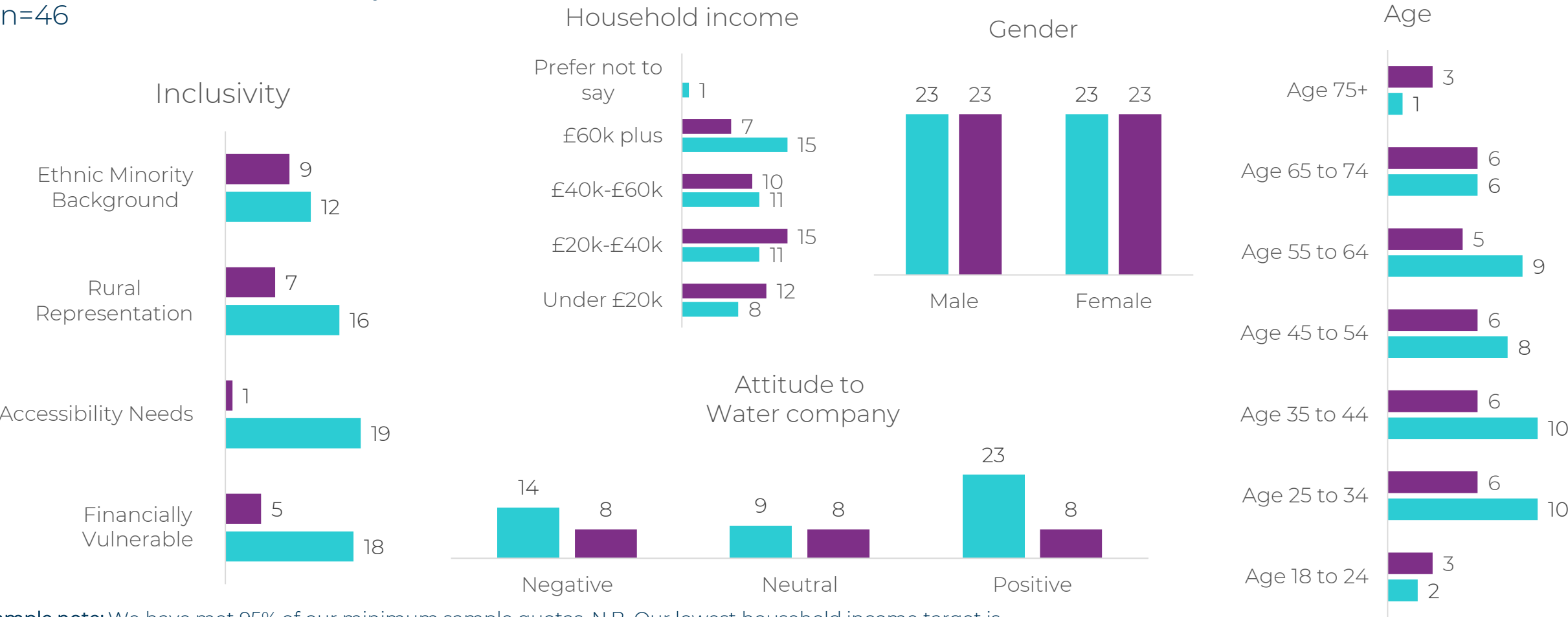
ccw.org.uk

Yorkshire Water

Community population



Yorkshire Water community members:
n=46



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 we were able to reach our financially vulnerable community members 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 18-24 & 75+ sample by at least 2 for next month.

Current Quota Minimum Quota

Yorkshire Water

What do Yorkshire Water community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Being heard & influencing change:** ensure real improvements across the sector and for water companies to genuinely listen.
- **Service improvements & better customer outcomes:** desire for practical improvements across the water system, better service quality and reliability, better communication and faster responses to issues.
- **Accountability & transparency:** greater accountability for failures and poor performance, and transparency around where customer money goes.
- **Environmental protection & sustainable water management:** protecting water quality and ensuring a clean and safe supply, clean rivers and reduce sewage discharge.
- **Collaboration & learning:** collective discussion and community involvement, community members also want to broaden their knowledge.

“What Yorkshire Water community members have said...”

“I hope it broadens my knowledge of water and helps me to understand what water companies are and should be responsible for.” Male, 25, Lives with partner

“Water companies to provide better service to their customers in future, which would be a win win for both customers and water companies.” Male, 41, Lives with partner and child/children

“That it can influence water companies to reflect the needs of its customers when planning ahead.” Male, 58, Lives with partner

“Better service and improved facilities and maintenance in local area. Prevent future hosepipe bans.” Female, 35, Lives with partner and child/children



Yorkshire Water community members want to give consumers a real voice that water companies genuinely respond to, driving improvements in service quality, accountability, transparency, and environmental responsibility. They also hope to learn more about how water services work, share ideas with others, and help shape a fairer, more sustainable water system for the future.

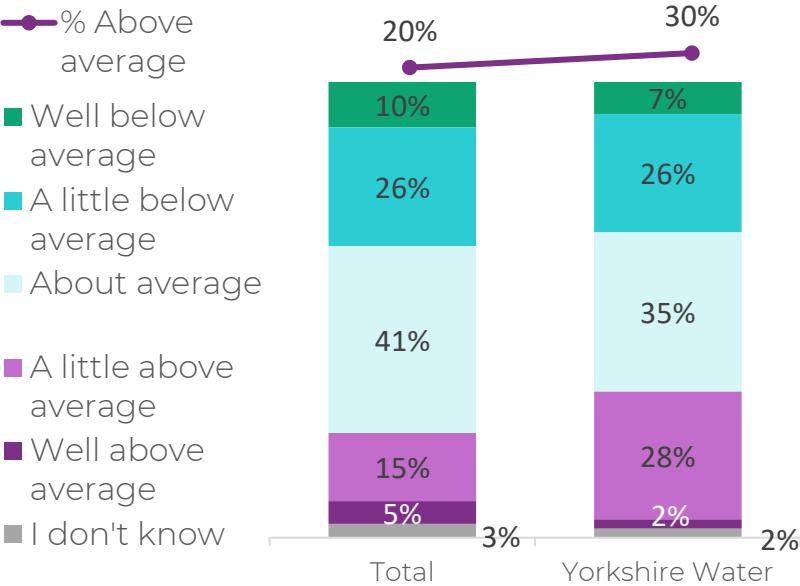
Active community members
Total Base Size: 755
Yorkshire Water Base Size: 46

Water Use at Home

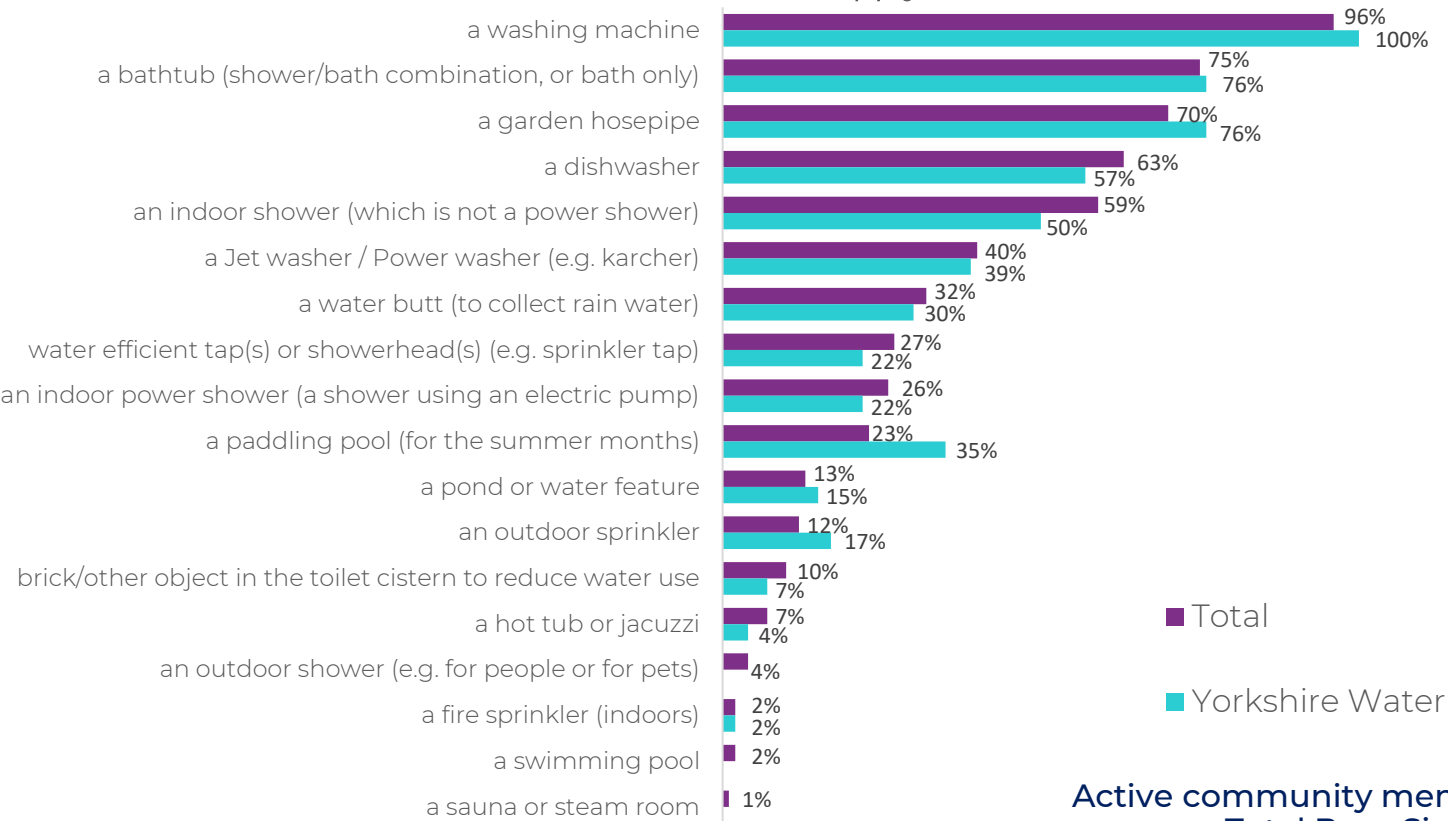
Yorkshire Water community members are more likely to report their water consumption is “above average” compared to the norm. They are slightly less likely to report their water consumption is “about average” and “well below average”.

Yorkshire Water community members are more likely than the norm to have a garden hosepipe, a paddling pool and outdoor sprinklers. They are less likely to have an indoor shower, but their likelihood of having a bathtub is in line with the norm.

In a typical week, how much water would you say your household uses vs a similar household?

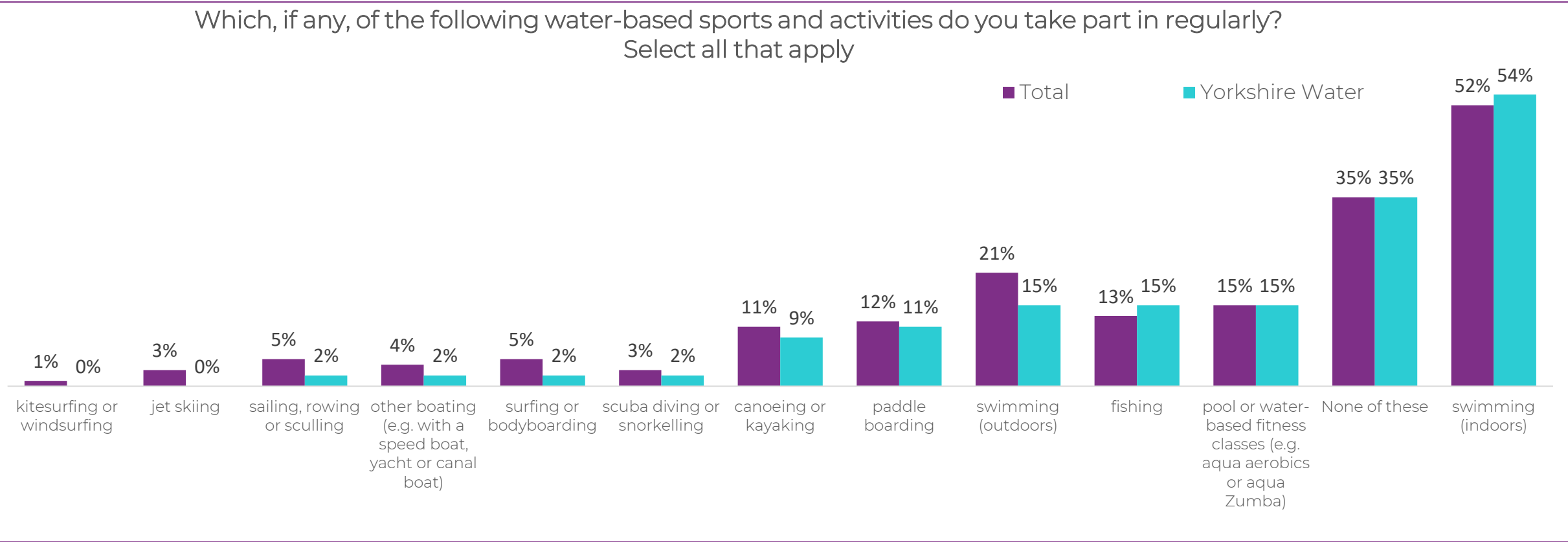


Which, if any of the following do you, or anyone who lives with you, use/have at home? - Select all that apply



Water Locations & Activities

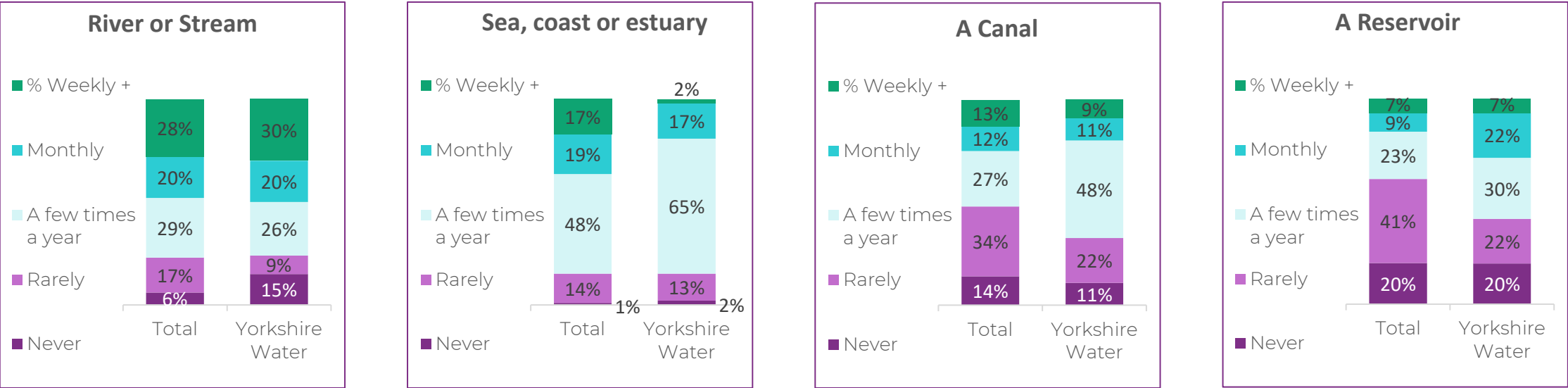
Swimming (indoors) is by far the most common water-based activity for Yorkshire Water community members. However, 35% of Yorkshire Water community members do not regularly participate in any of the activities mentioned below.



Water Locations & Activities

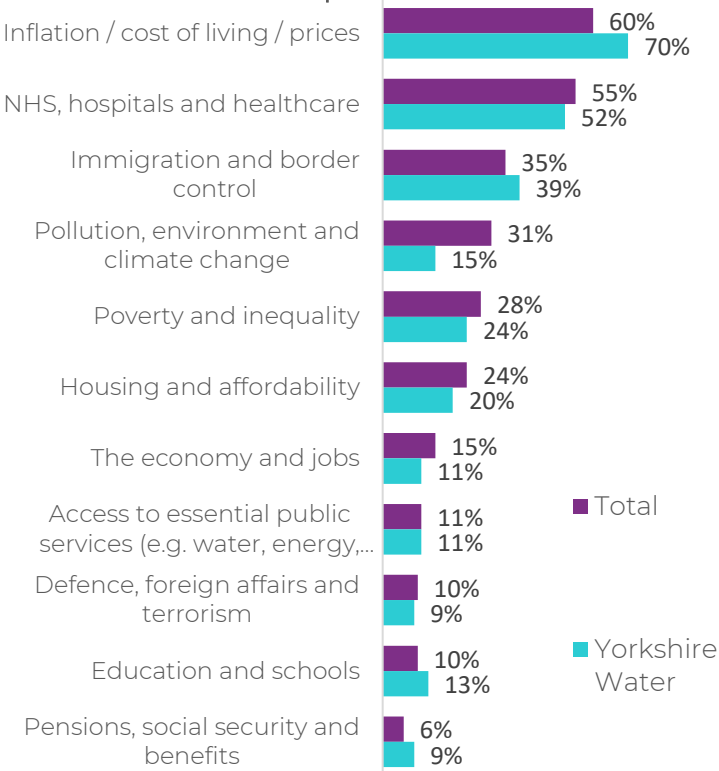
Yorkshire Water community members are more likely than the norm to visit the sea, coast or estuary, canals or reservoirs just a few times a year and they are more likely to never visit rivers or streams.

How often, if at all, do you spend time by or on the water at any of these places shown below?

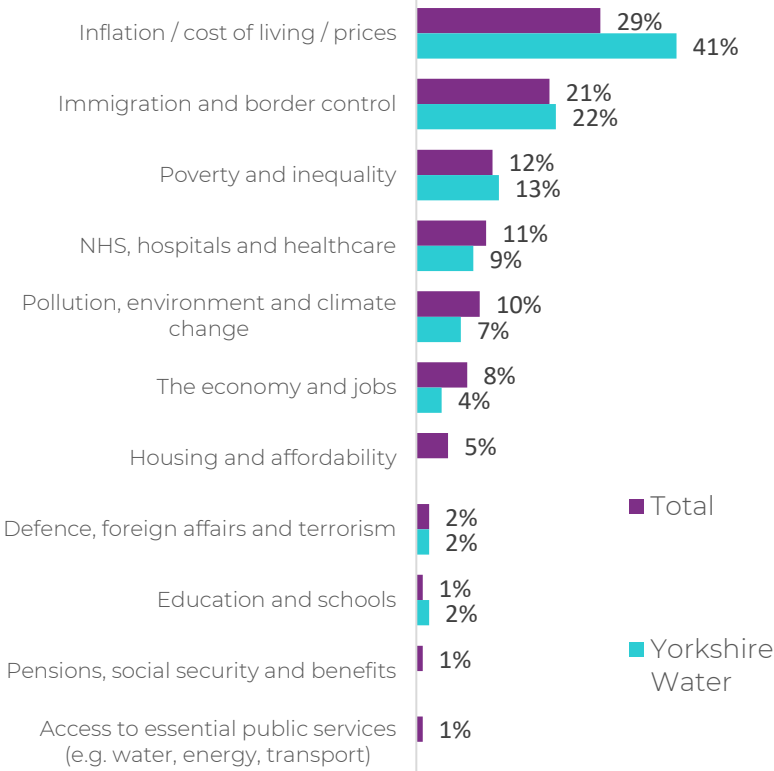


UK Issues

All Issues Facing the UK - Select up to two



ONE Main issue Facing the UK



Yorkshire Water community members have told us their top issue is:

- Inflation / cost of living / prices

This is by a higher number than the norm.

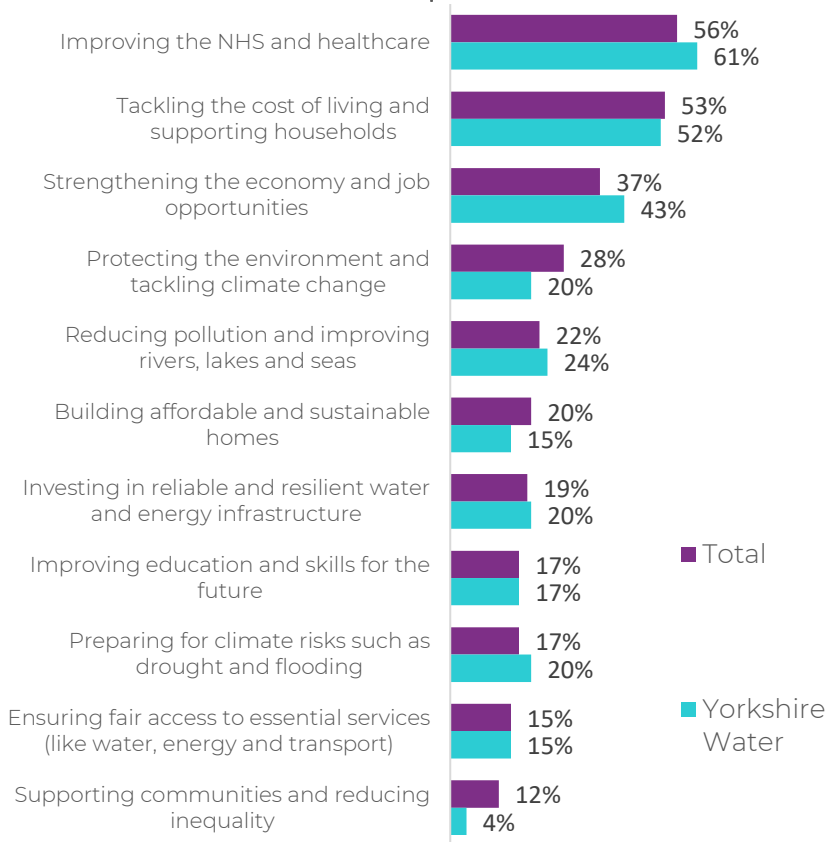
Immigration and border control ranks as second single biggest issues facing the UK, while poverty and inequality ranks third. This is in line with the norm.

UK Priorities

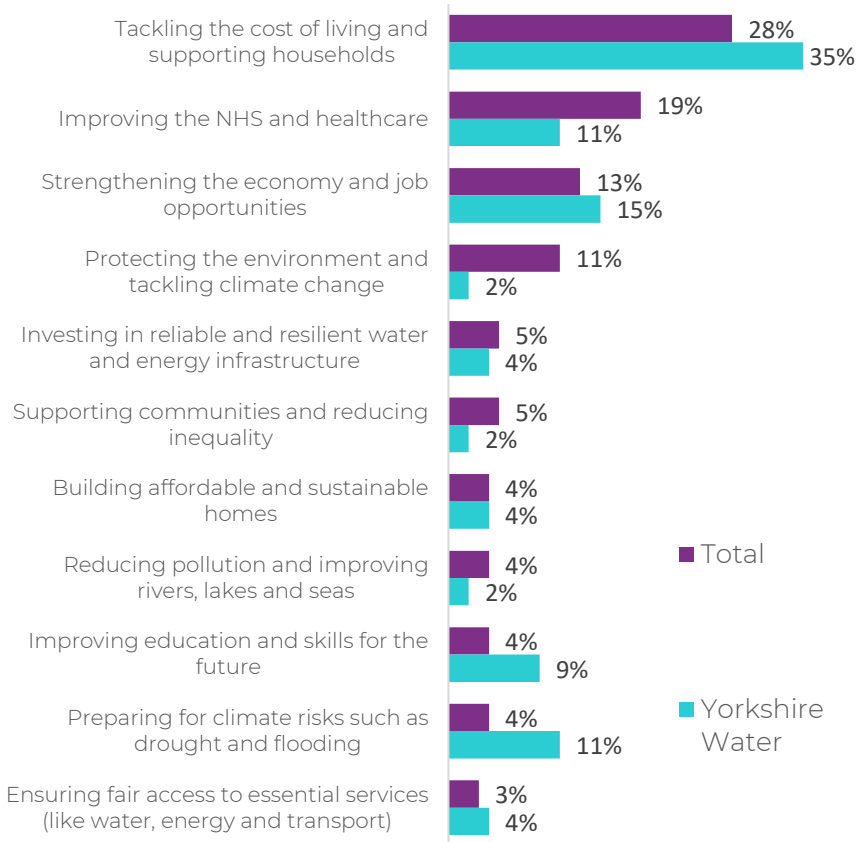
Yorkshire Water community members rank tackling the cost of living and supporting households as the top priority. This is by a higher number than the norm. The second top priority is strengthening the economy and job opportunities.

Yorkshire Water community members are slightly more likely than the norm to see reducing pollution and proving rivers, lakes and seas, and preparing for climate risks as priorities for the future.

Priorities for Government and Public Investment -
Select up to two



ONE Top National Priority

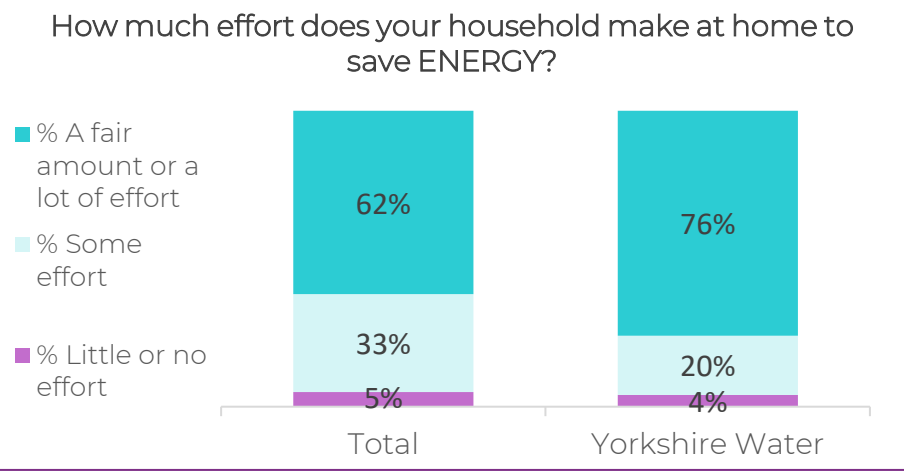
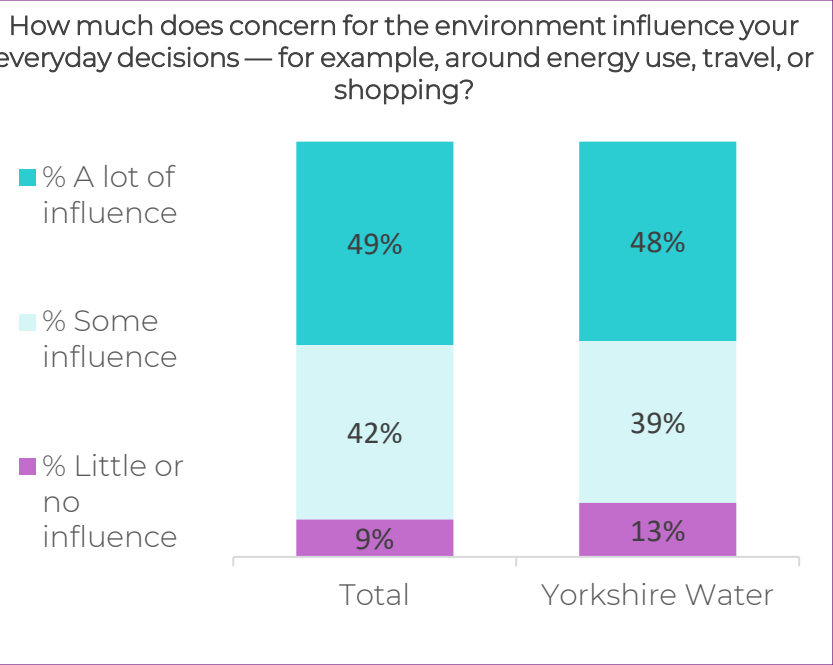


Environment Concerns

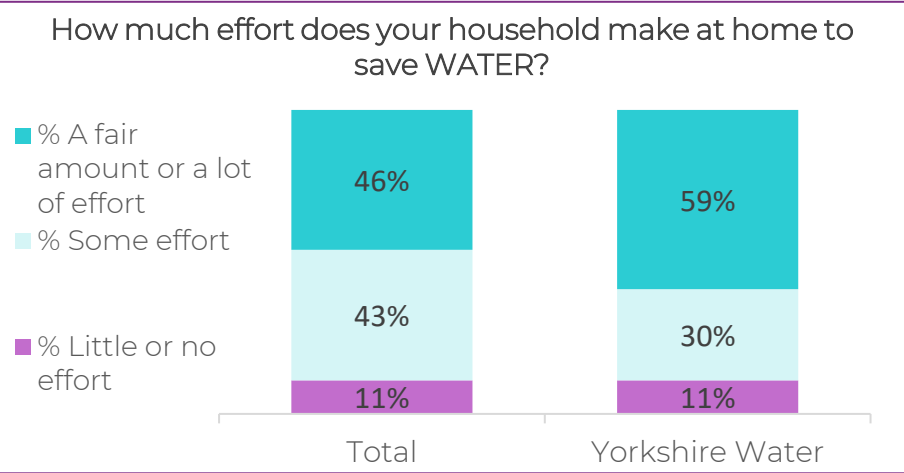
Including Saving Water & Energy



48% of Yorkshire Water community members say that concern for the environment has a lot of influence on their everyday decisions, which is in line with the norm.



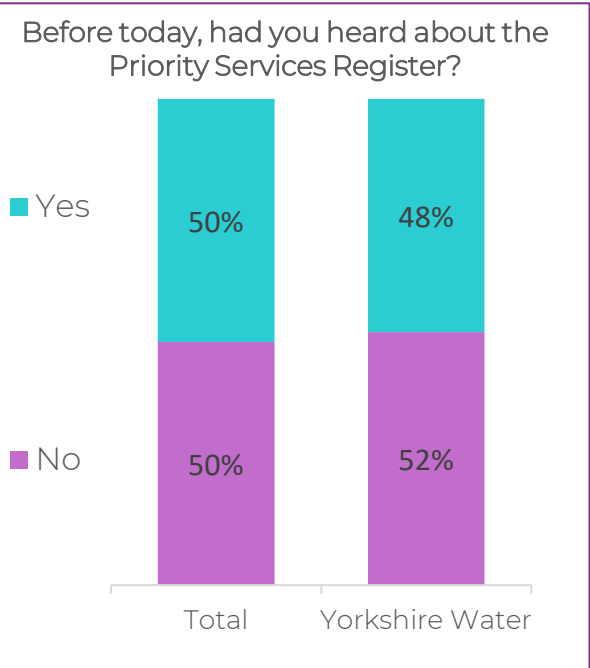
76% of Yorkshire Water community members say they make a fair amount or a lot of effort to save energy. This is above the norm.



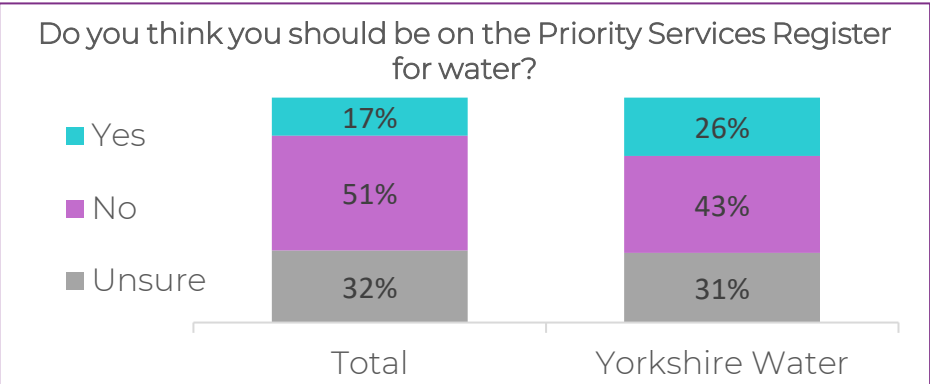
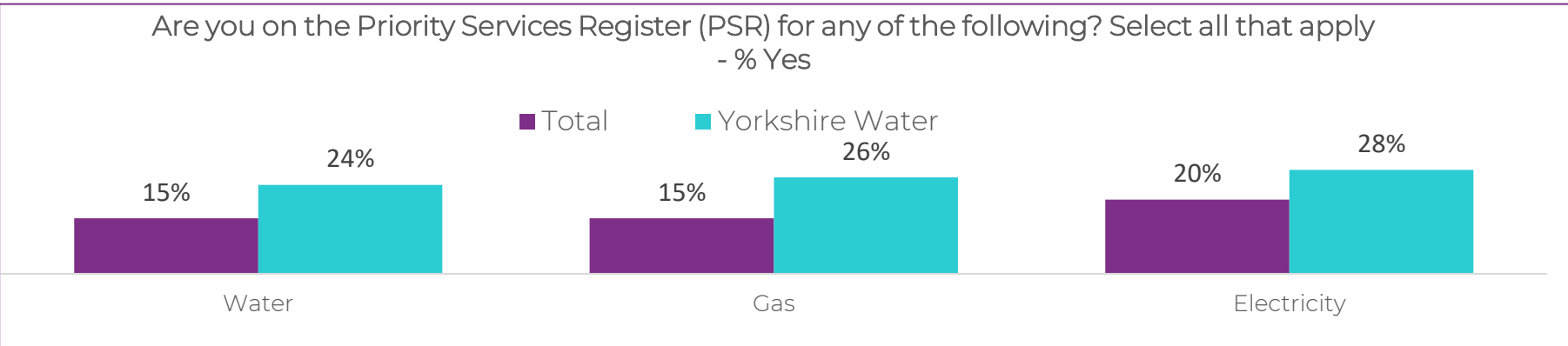
Yorkshire Water community members are more likely to say they make a fair amount or a lot of effort to save energy than to save water than the norm.

Priority Services Register

Overall, 48% of Yorkshire Water community members say they have heard of the Priority Services Register.



A higher proportion of Yorkshire Water community members say they are on the Priority Services Register for electricity than for gas or water and they are more likely to be on these registers generally, compared to the norm.



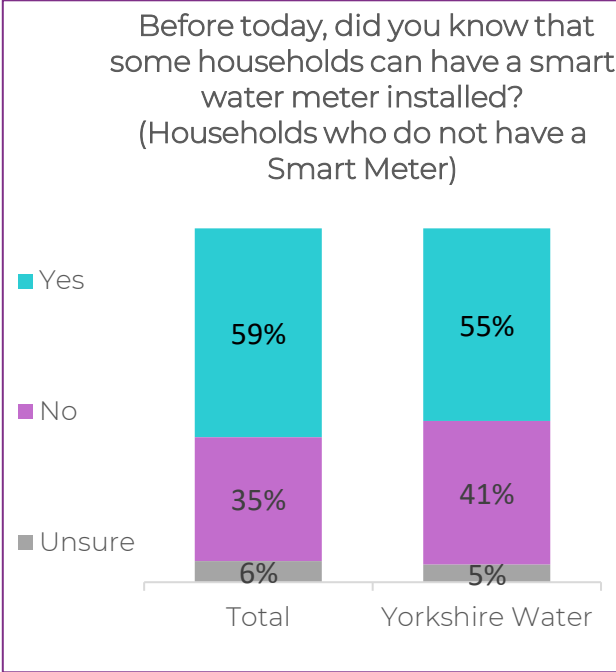
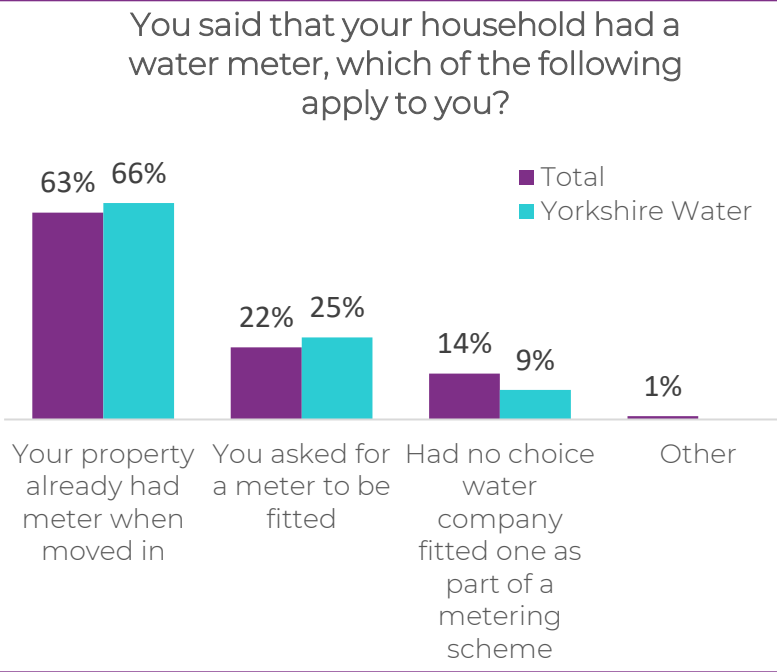
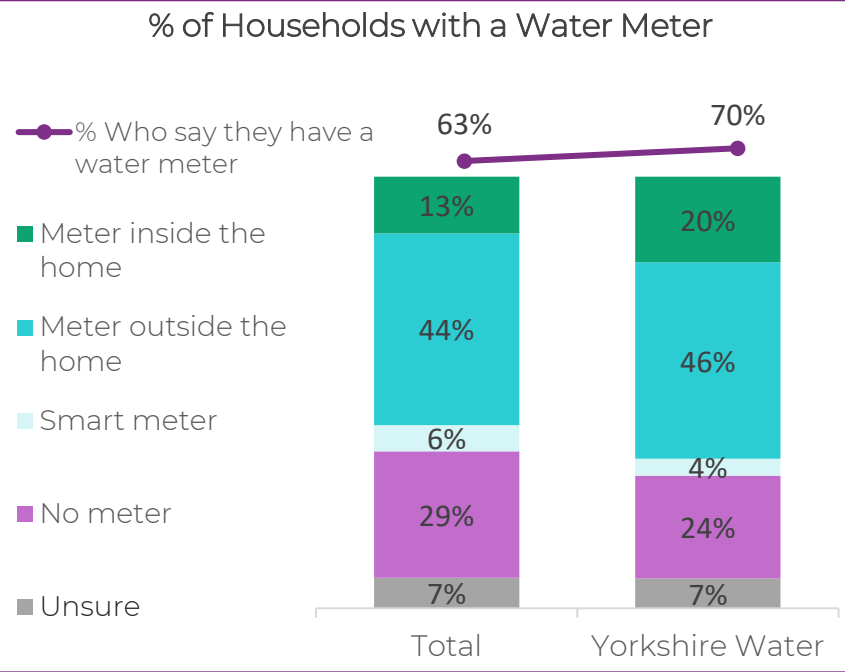
For those not currently on the Priority Services Register for water, 26% of Yorkshire Water community members think they should be on it.

Water Meters

Yorkshire Water community members are more likely than the norm to have a water meter. While they are slightly more likely to have a meter inside the home compared to the norm, they are slightly less likely to have a smart meter.

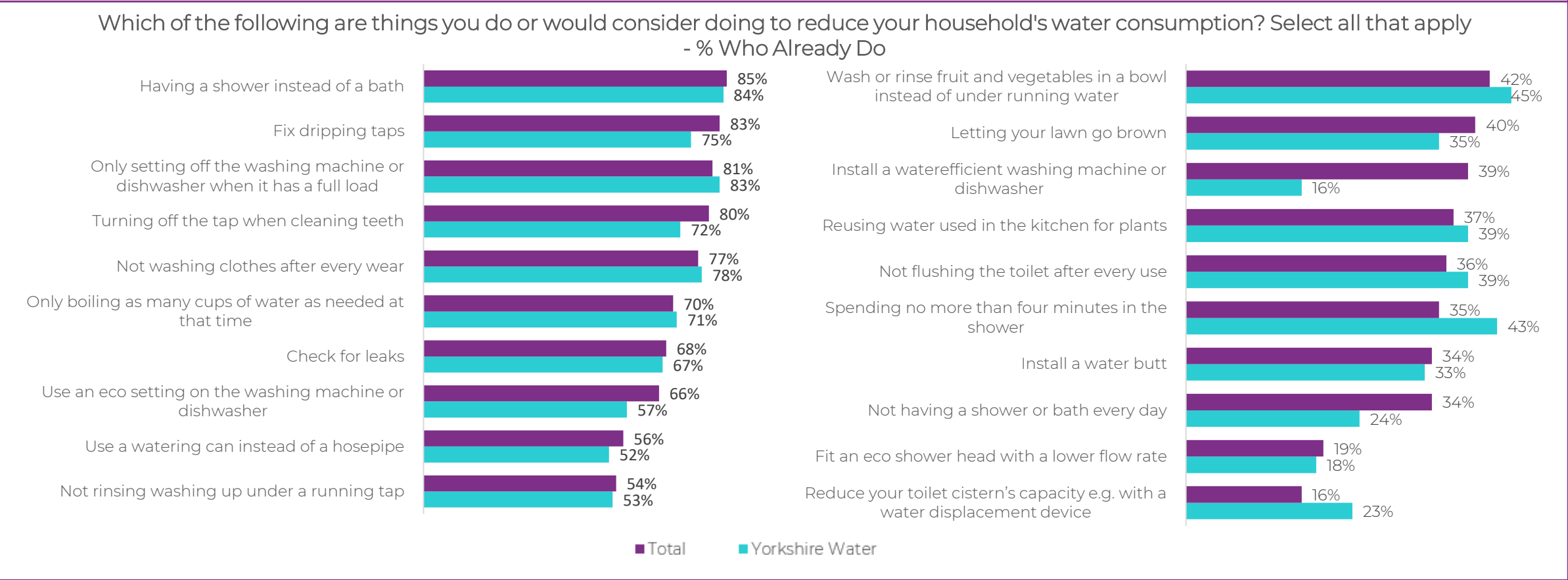
Among Yorkshire Water community members who have a water meter, 66% already had a water meter installed when they moved in (slightly above the norm).

55% of Yorkshire Water community members know that households can have a smart water meter installed.



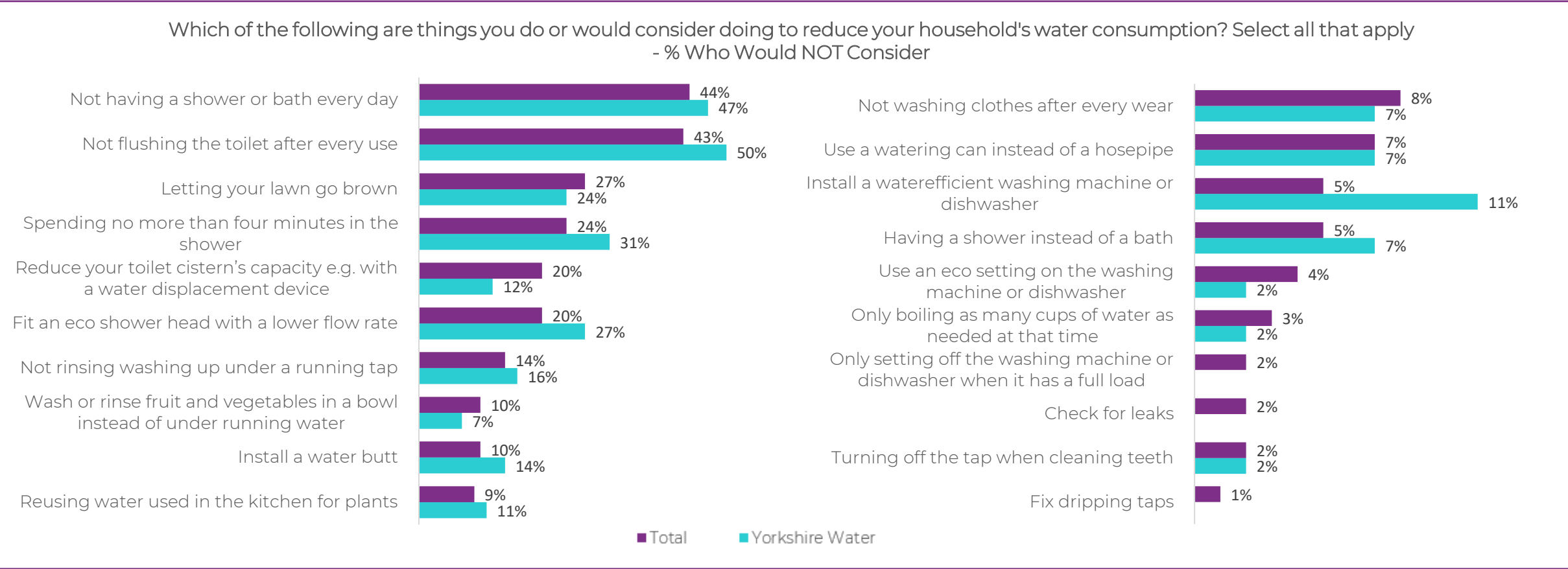
Water-Saving Measures

Most of Yorkshire Water community members say they are already having a shower instead of a bath, only setting off the washing machine or dishwasher when it has a full load, and not washing clothes after every wear. They are more likely than the norm to spend no more than four minutes in the shower, but are less likely to install a water-efficient washing machine or dishwasher.



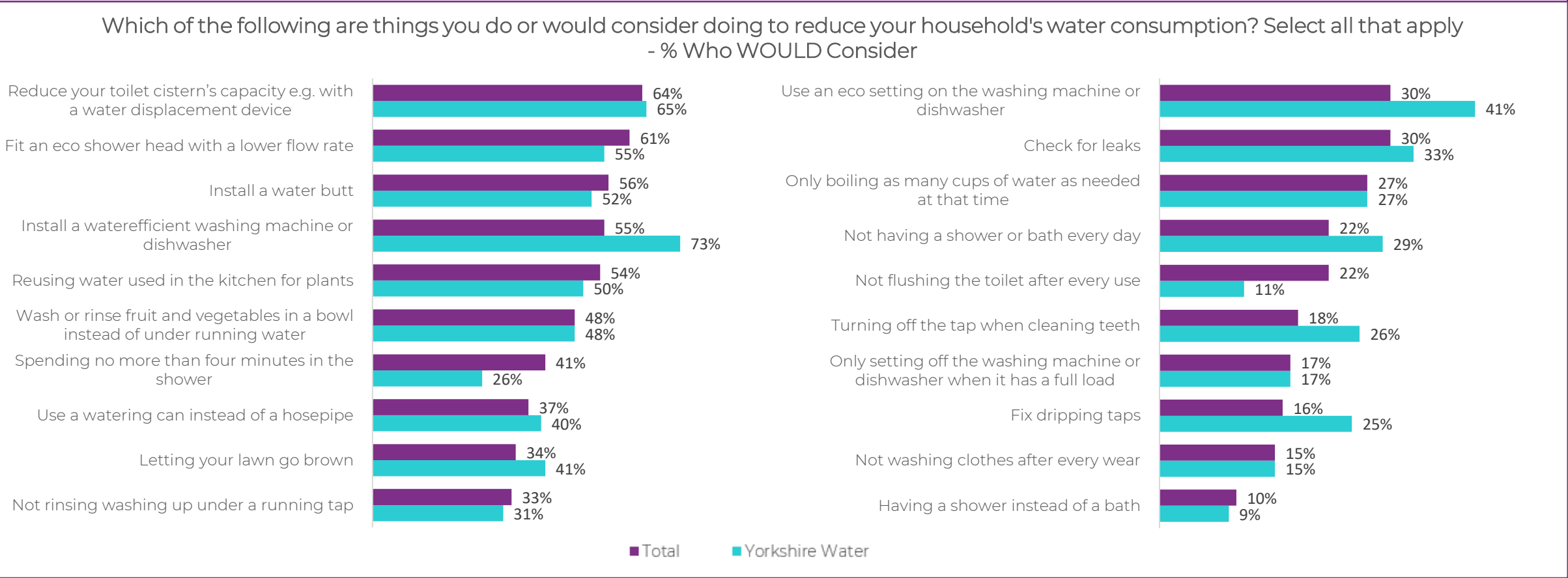
Water-Saving Measures

For Yorkshire Water community members, the water-saving measures generating the greatest resistance not flushing the toilet after every use and not having a shower or bath every day (both by a number higher than the norm).



Water-Saving Measures

For Yorkshire Water community members, the highest levels of openness are to installing a water-efficient washing machine or dishwasher, reducing the toilet cistern’s capacity, and fitting an eco shower.

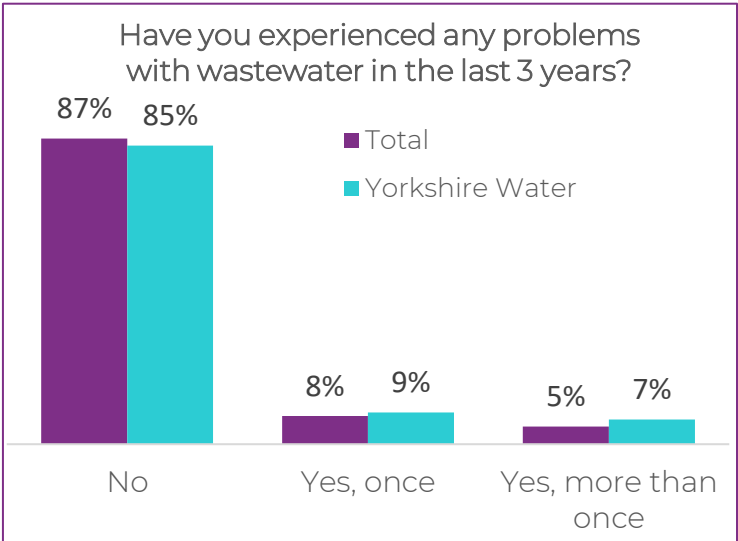
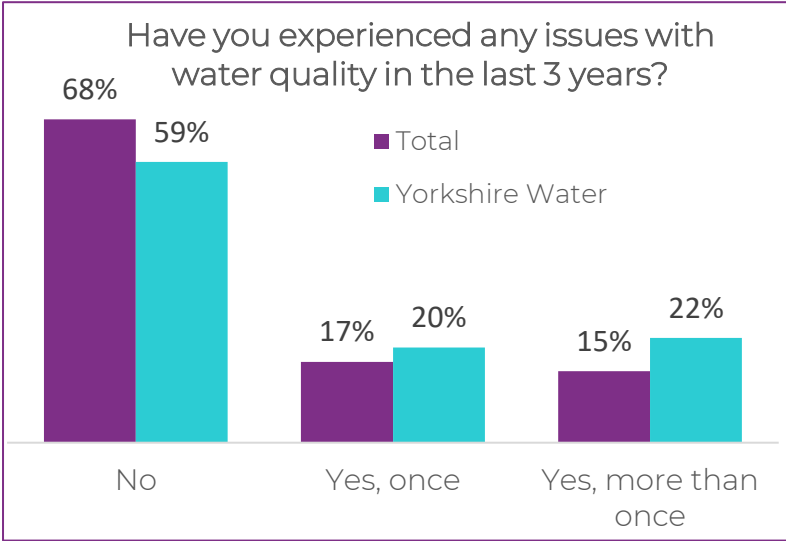
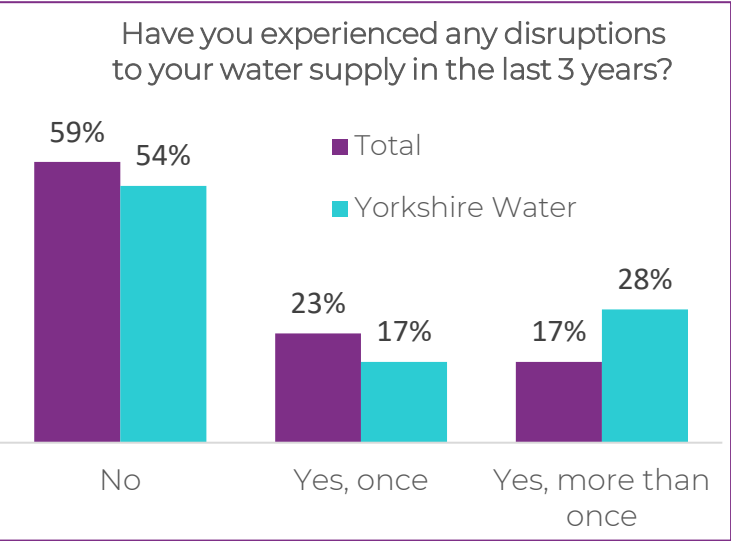


Disruptions & Issues

54% of Yorkshire Water community members say they have not experienced supply disruptions in the last 3 years (slightly below the norm). 17% have had one disruption. 28% have had a disruption more than once (above the norm).

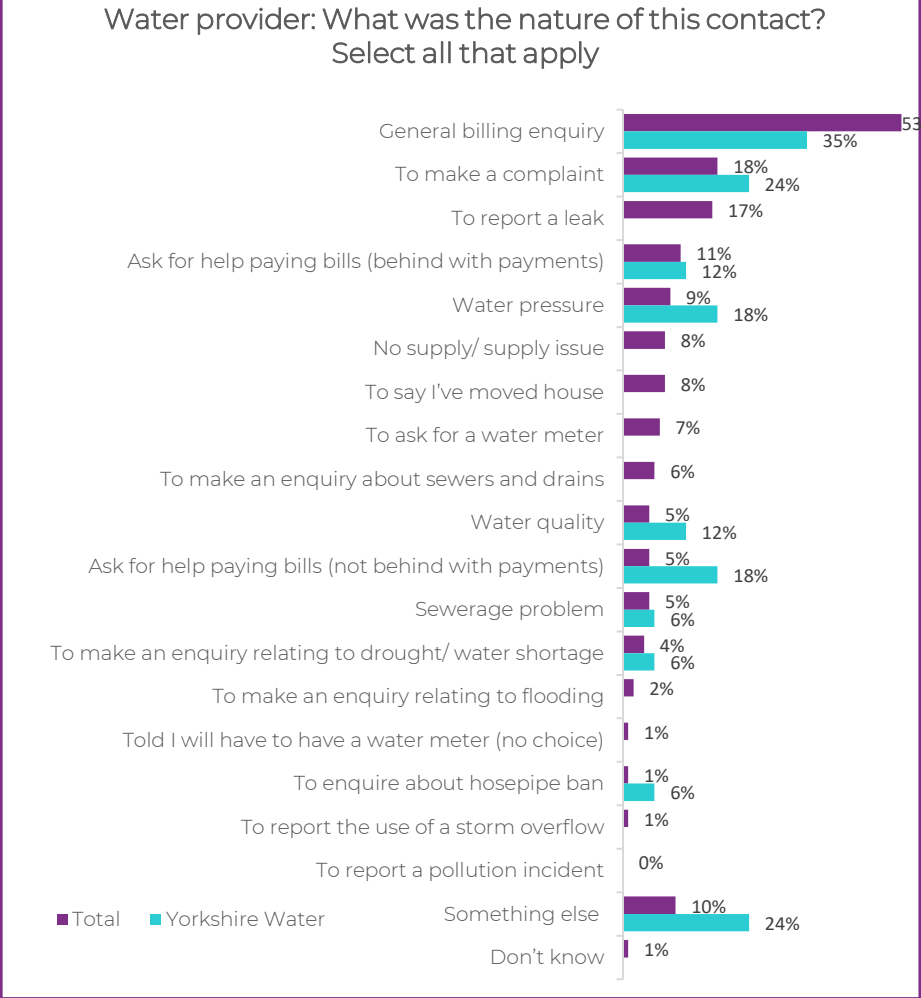
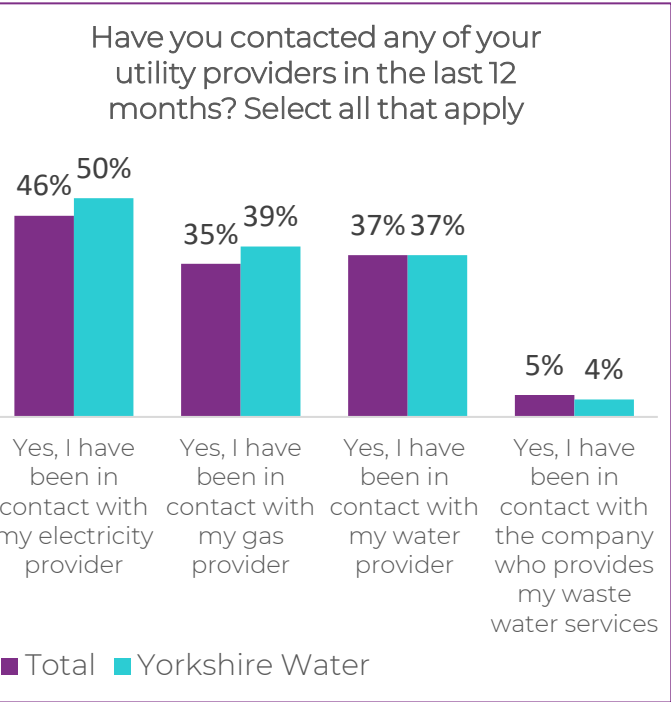
59% of Yorkshire Water community members say they have had no issues with water quality in the last 3 years, below the norm. 20% have had one issue and 22% more than one issue (slightly higher than the norm).

85% of Yorkshire Water community members say they have had no problems in the last 3 years with wastewater (marginally below the norm). 9% have once had an issue and 7% have had an issue more than once.

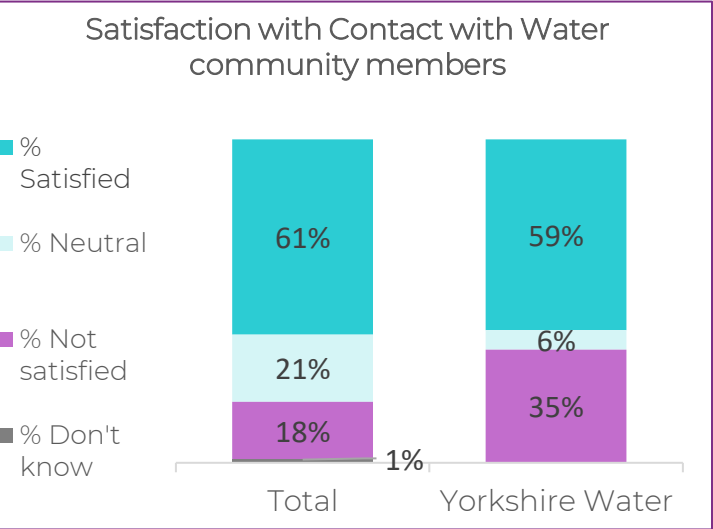


Contact with utility providers

37% of community members have been in contact with Yorkshire Water in the last 12 months, in line with the norm.

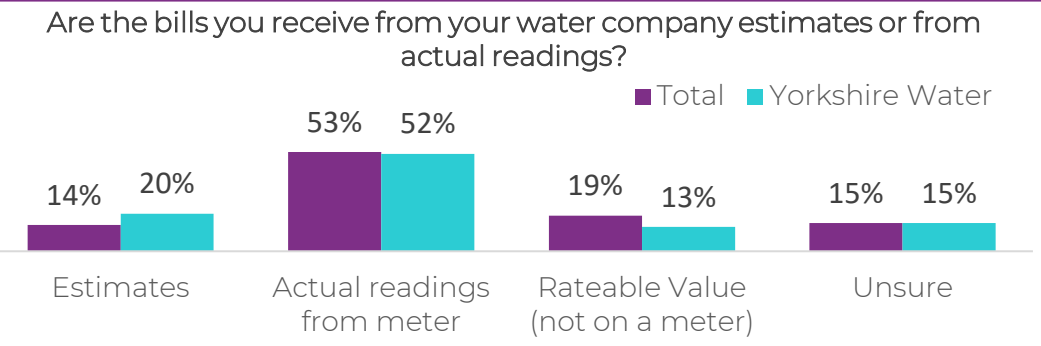


Billing enquiries are the main reason for contacting Yorkshire Water, though this is below the norm. Making a complaint, water pressure and help paying bills (not behind on payments) follow at 18%, a higher number than the norm. 59% of Yorkshire Water community members who made contact were satisfied with that contact. This is marginally lower than the norm.

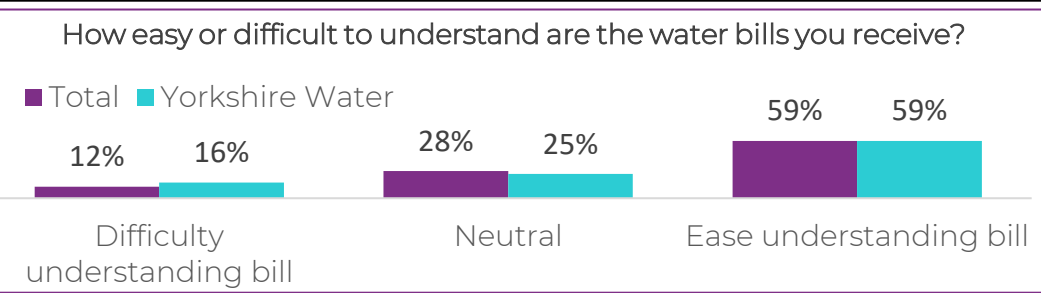


Billing

Yorkshire Water community members are more likely than the norm to have their water bills based on estimates and less likely to have rateable value as their base.

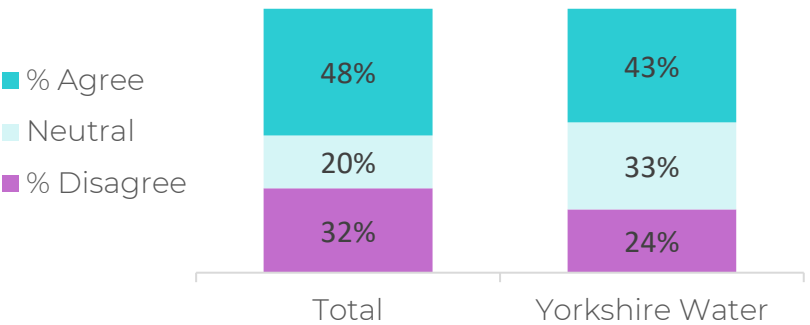


59% of Yorkshire Water community members say they find it easy to understand their water bills, in line with the norm.



How much do you agree or disagree with the following statements?

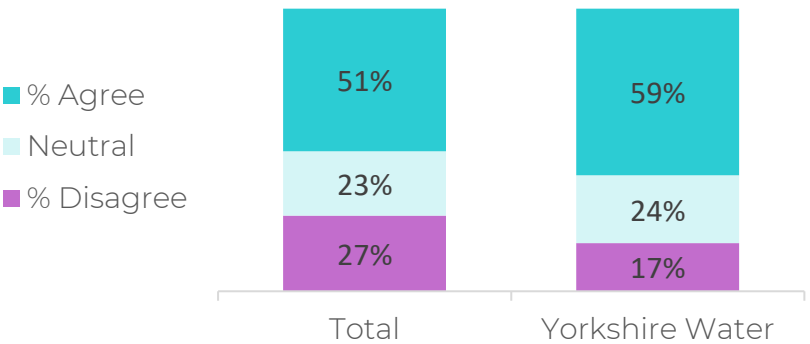
I fully understand how my water bill is calculated



43% of Yorkshire Water community members feel they understand how their water bill is calculated, slightly below the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



Yorkshire Water community members are more likely than the norm to agree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Dŵr Cymru

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

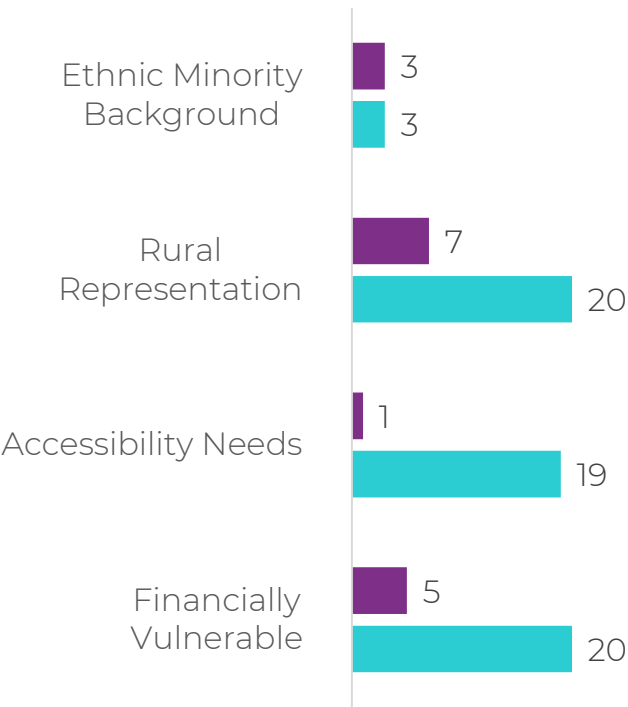
ccw.org.uk

Dŵr Cymru community members:

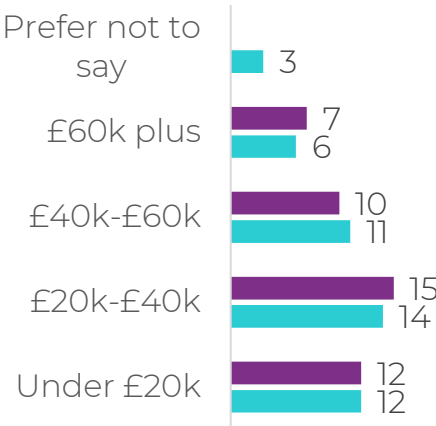
n=46

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.

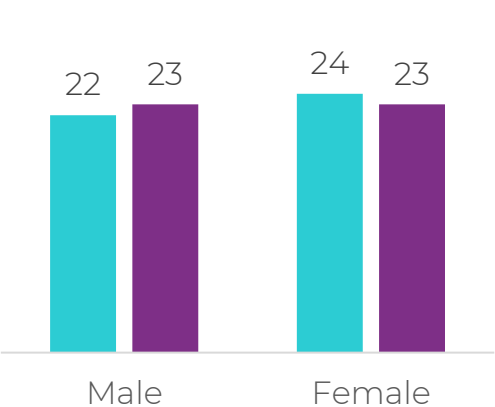
Inclusivity



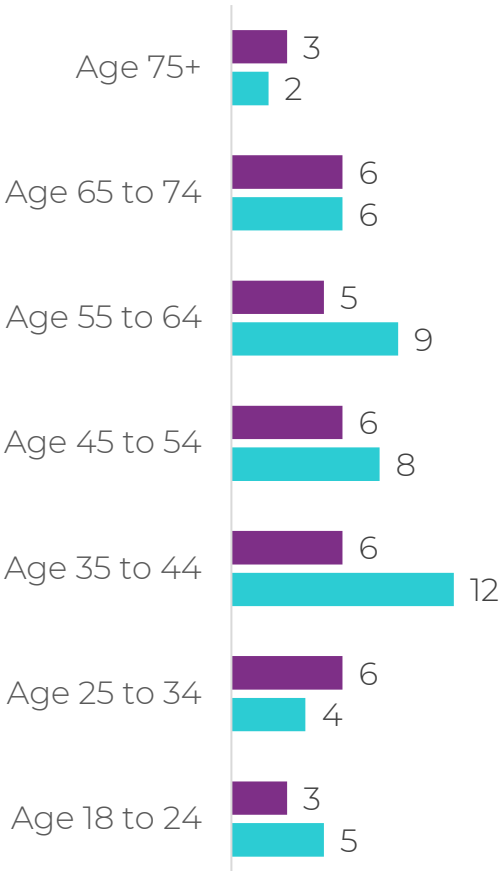
Household income



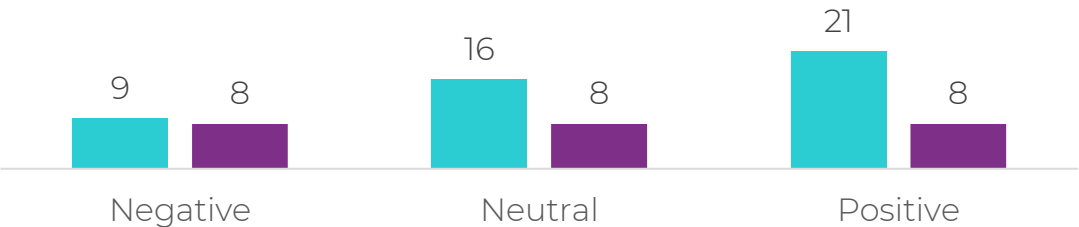
Gender



Age



Attitude to Water company



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.

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Service improvements, water quality & system efficiency:** strong emphasis on practical, customer-facing improvements, improving water supply, safety and quality.
- **Being heard & influencing change:** ensure communities experiences help to shape change, and water companies listen to their concerns.
- **Accountability & transparency:** greater accountability for failures and poor performance, and transparency around where customer money goes.
- **Collaboration & learning:** collective discussion and community involvement, community members also want to broaden their knowledge of water processes.
- **Environmental & sustainability:** reduce pollution and ensure sustainability is taken seriously.

“What Dŵr Cymru community members have said...”

“I hope the water company will listen to what is being said and possibly act on it to improve services for their customers.” Female, 57, Lives with partner

“Understanding the customers and making sure we have good quality water and keeping it low cost.” Female, 39, Lives with child/children

“I hope that Water Voice panel will listen to the participants opinions and feed back to the companies so that positive changes can be made to benefit the wider communities.” Female, 44, Lives with partner and child/children

“A better service for all households in Wales.” Female, 65, Lives with child/children



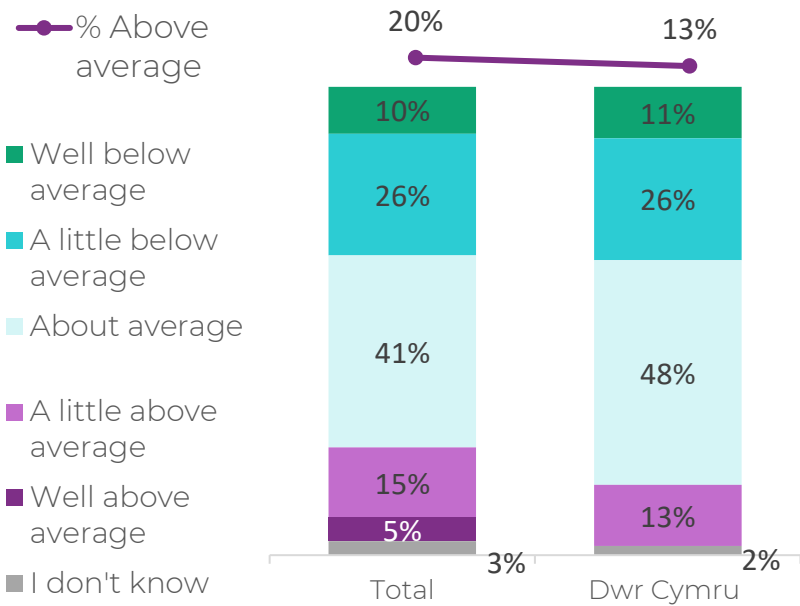
Our community members want Dŵr Cymru to genuinely listen to their insights and use them to improve service quality, communication, pricing fairness, and environmental responsibility. They hope the community strengthens transparency, accountability, and shared understanding, ultimately leading to a more reliable, customer-focused water service for communities across Wales.

Active community members
Total Base Size: 755
Dŵr Cymru Base Size: 46

Water Use at Home

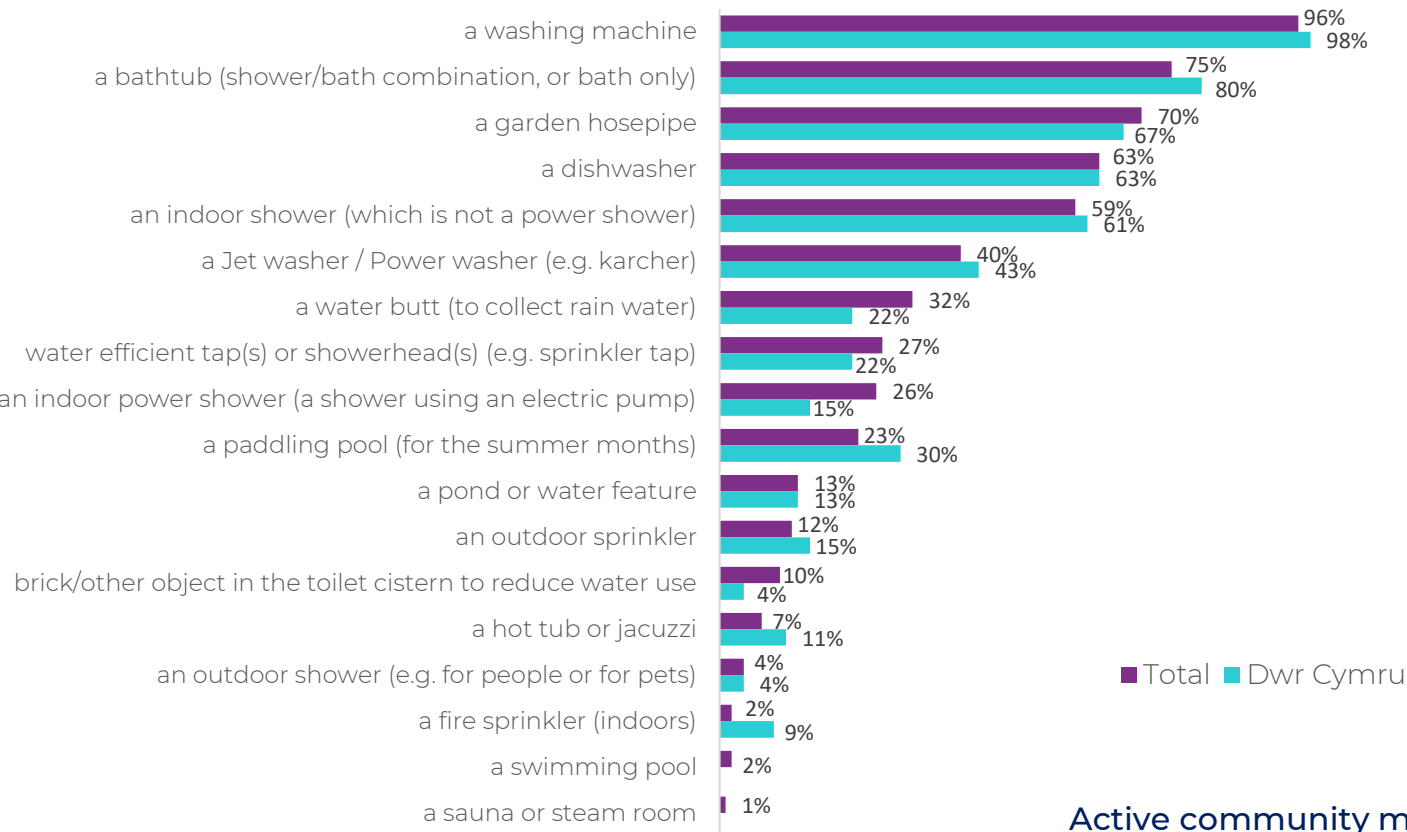
Dŵr Cymru community members are less likely than the norm to report their water consumption as “above average”, with 0% reporting it as “well above average” and 13% “a little above average”. They are slightly more likely than the norm to report their consumption is “about average”.

In a typical week, how much water would you say your household uses vs a similar household?



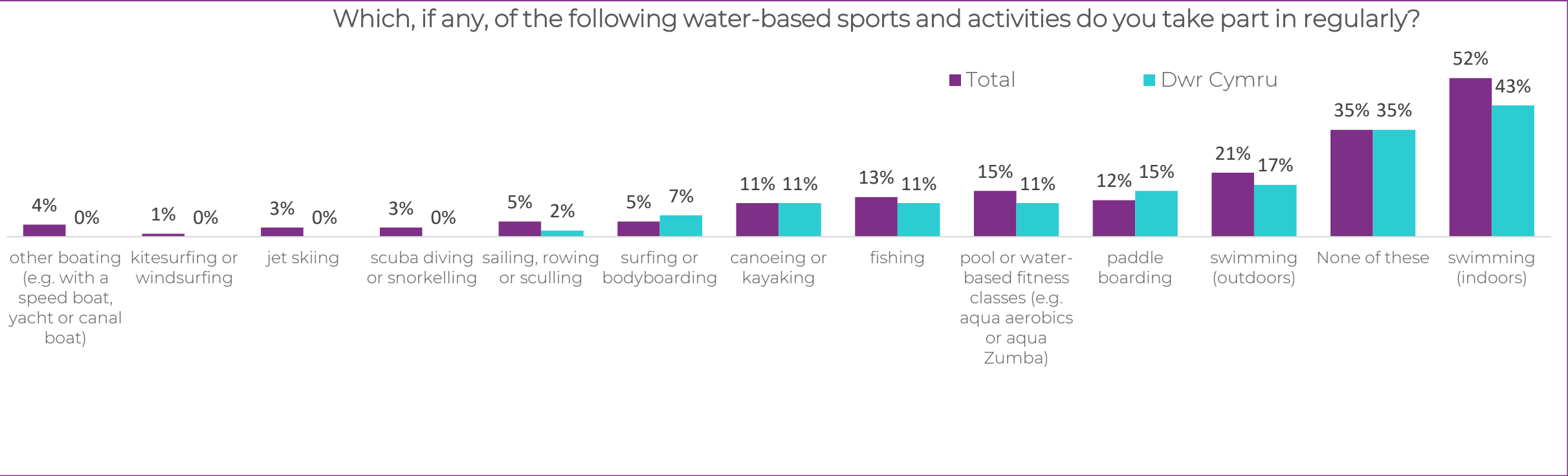
Dŵr Cymru community members are more likely than the norm to have a bathtub and less likely to have an indoor power shower. They are more likely to have a paddling pool and a hot tub or jacuzzi.

Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Water Locations & Activities

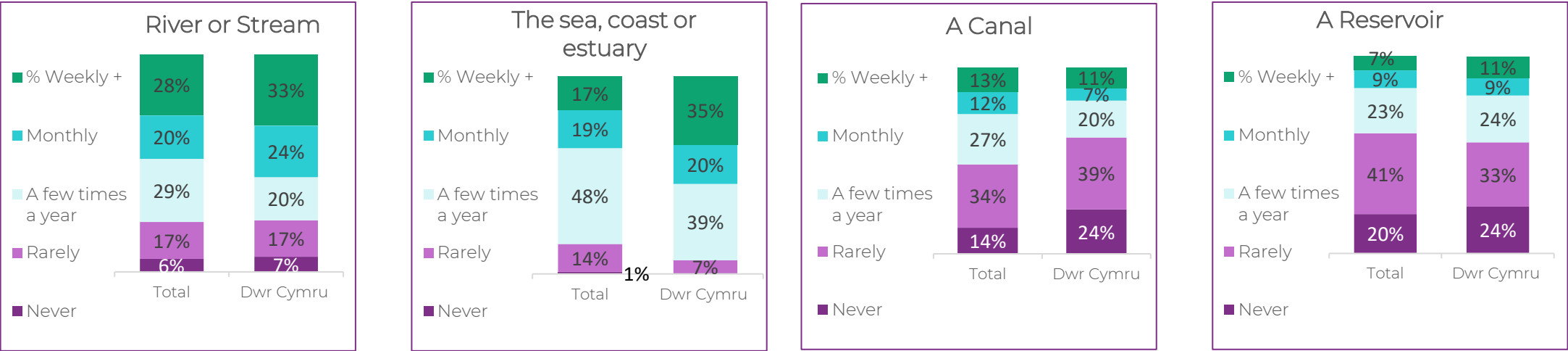
Swimming (indoors) is the most common water-based activity for Dŵr Cymru community members, although by a lower number than the norm. This is followed by swimming (outdoors) and paddle boarding. 35% of these community members do not regularly practice any of the water-based activities or sports listed, on par with the norm.



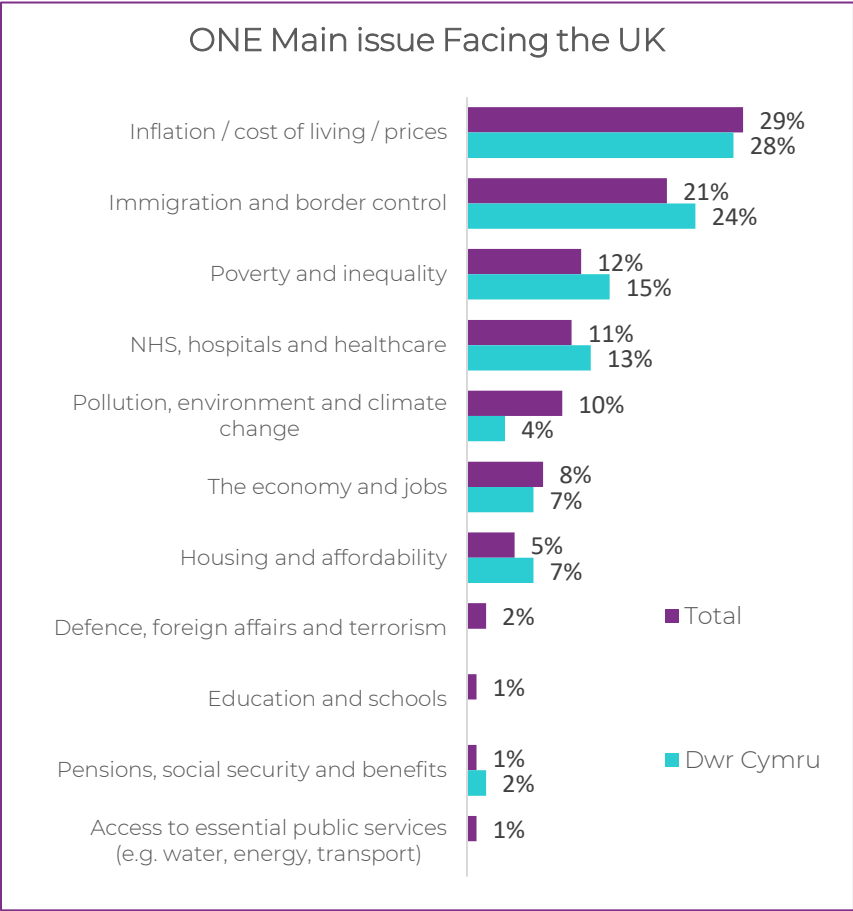
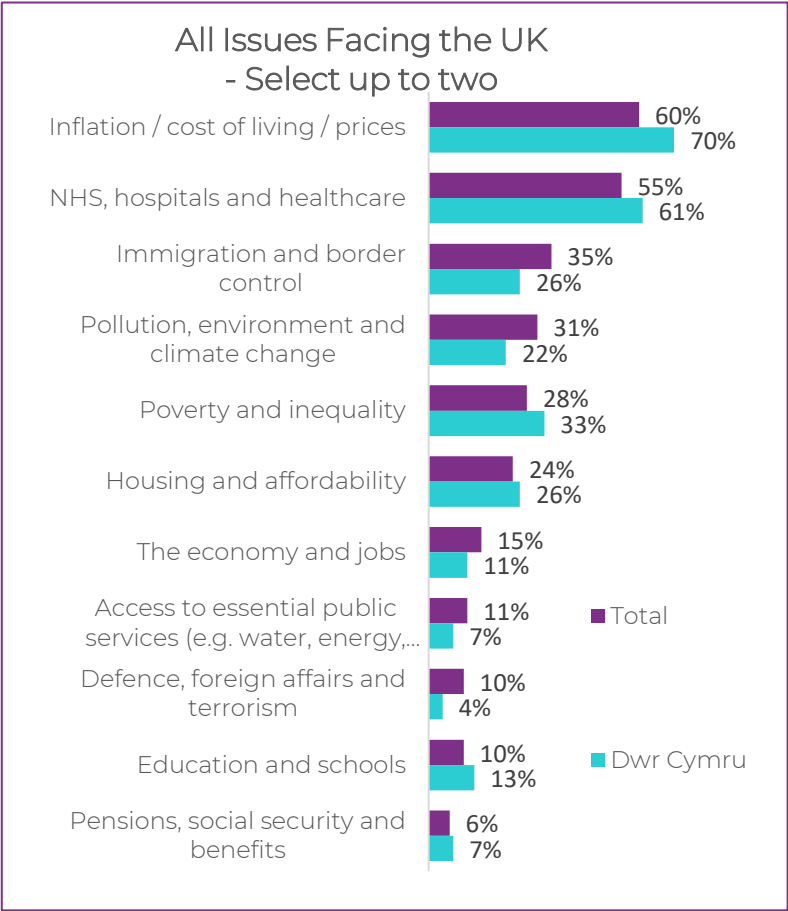
Water Locations & Activities

Dŵr Cymru community members are more likely than the norm to visit rivers, streams, the sea, coast or estuary weekly and monthly and less likely to rarely visit reservoirs. They are more likely to never or rarely visit canals.

How often, if at all, do you spend time by or on the water at any of these places shown below?



UK Issues



Dŵr Cymru community members have told us their top issue is:

- Inflation / cost of living / prices

This is on par with the norm.

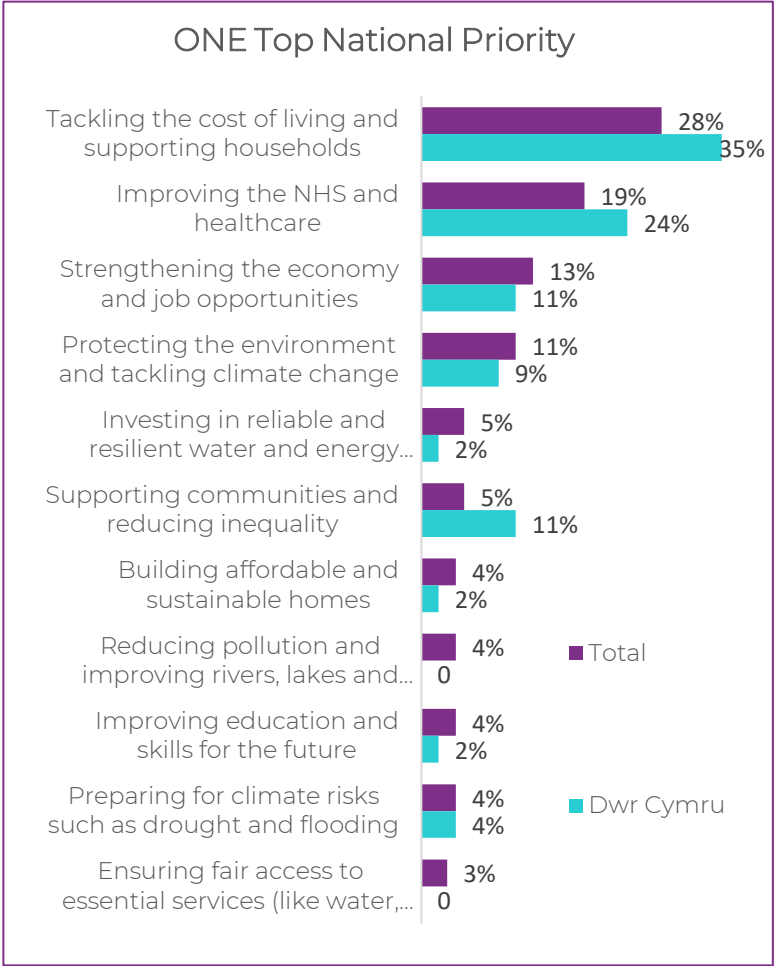
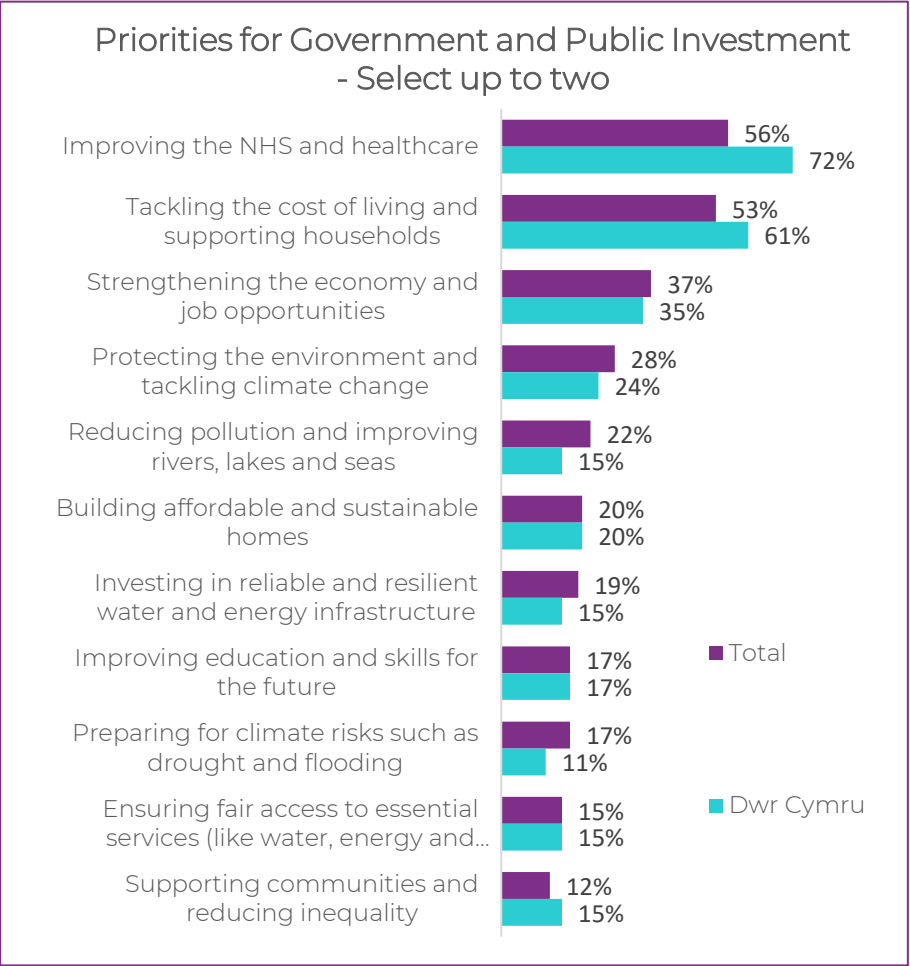
Immigration and border control, and poverty and inequality rank as second and third single biggest issues, both with a slightly larger number than the norm.

Dŵr Cymru community members are less likely than the norm to select pollution, environment and climate change as their biggest issue facing the UK.

UK Priorities

Dŵr Cymru community members rank tackling the cost of living and supporting households as the top priority, followed by improving the NHS and healthcare. Both of these priorities are above the norm.

Dŵr Cymru community members are also more likely than the norm to see supporting communities and reducing inequality as a top priority.

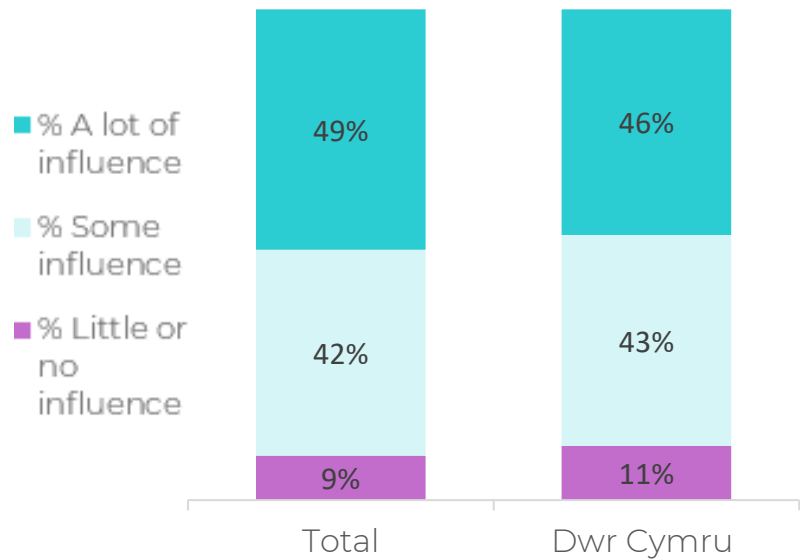


Environment Concerns

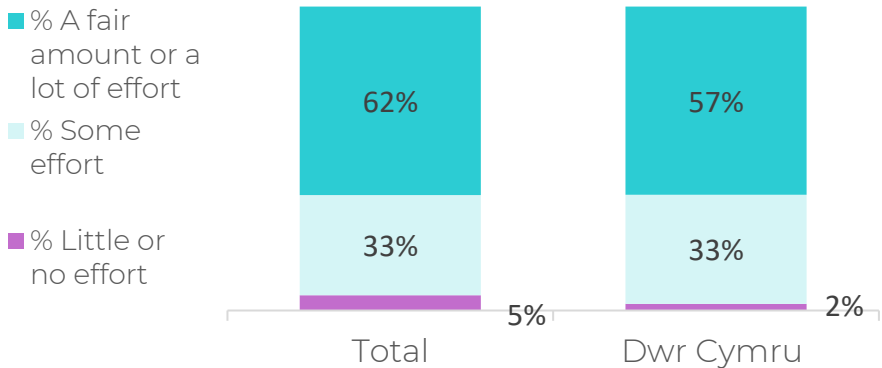
Including Saving Water & Energy

Dŵr Cymru community members are slightly less likely to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

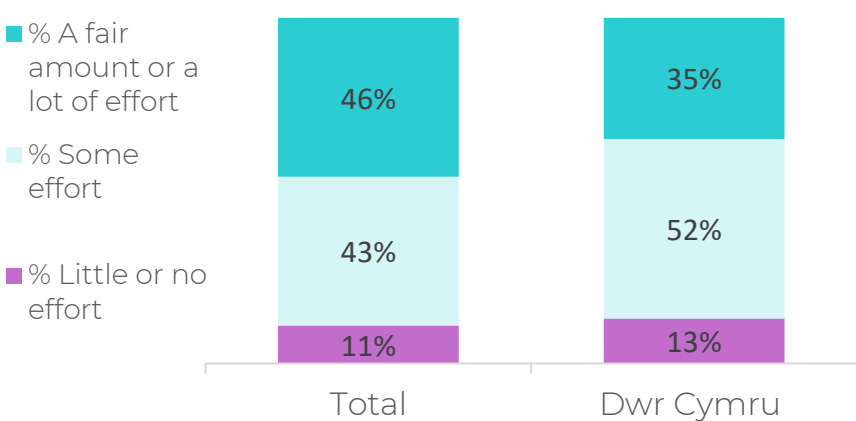


How much effort does your household make at home to save ENERGY?



57% of Dŵr Cymru community members say they make a fair amount or a lot of effort to save energy. This is slightly below the norm.

How much effort does your household make at home to save WATER?

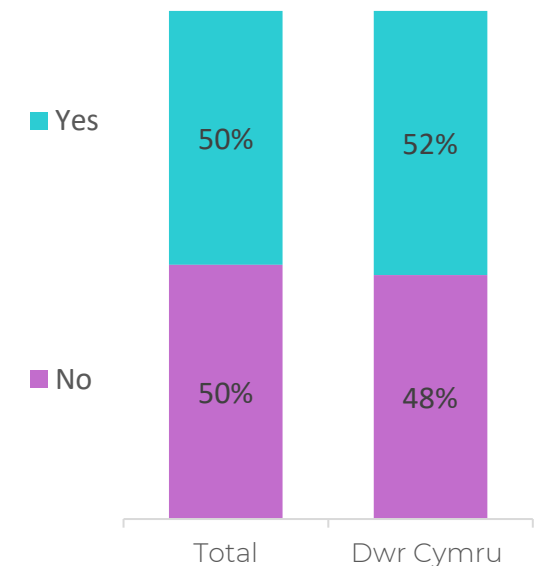


Dŵr Cymru community members are less likely to say they make a fair amount or a lot of effort to save water than the norm.

Priority Services Register

Overall, 52% of Dŵr Cymru community members say they have heard of the Priority Services Register.

Before today, had you heard about the Priority Services Register?



A higher proportion of Dŵr Cymru community members say they are on the Priority Services Register for gas and electricity than for water. They are more likely to be on the gas register compared to the norm.

Are you on the Priority Services Register (PSR) for any of the following? Select all that apply

- % Yes

■ Total

■ Dwr Cymru

15%

15%

Water

15%

20%

Gas

20%

20%

Electricity

Do you think you should be on the Priority Services Register for water?

■ Yes

■ No

■ Unsure

17%

51%

32%

Total

5%

62%

33%

Dwr Cymru

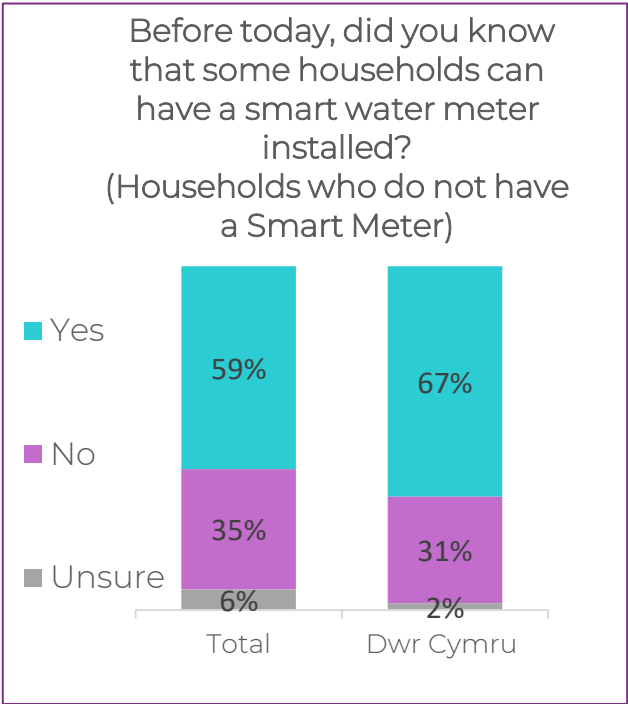
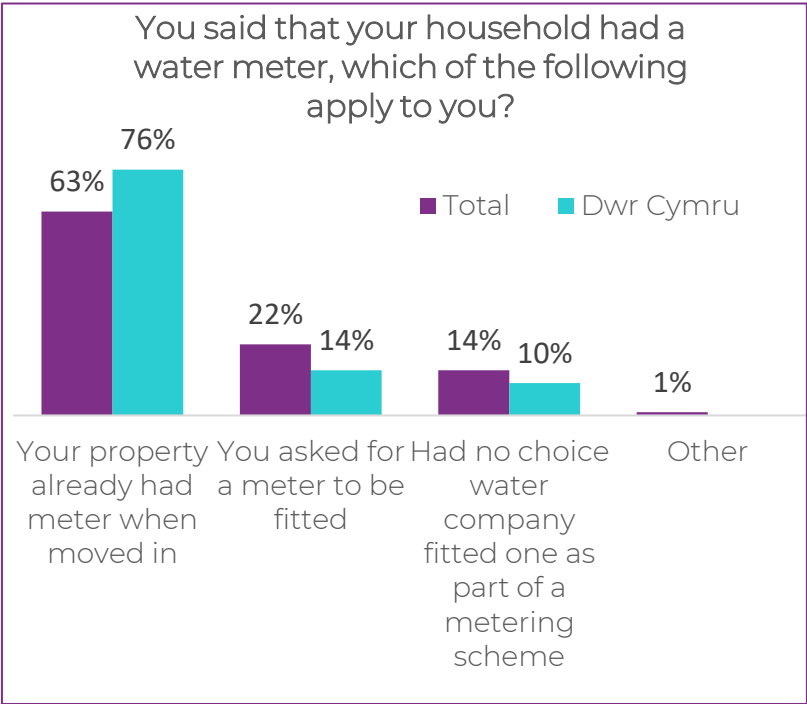
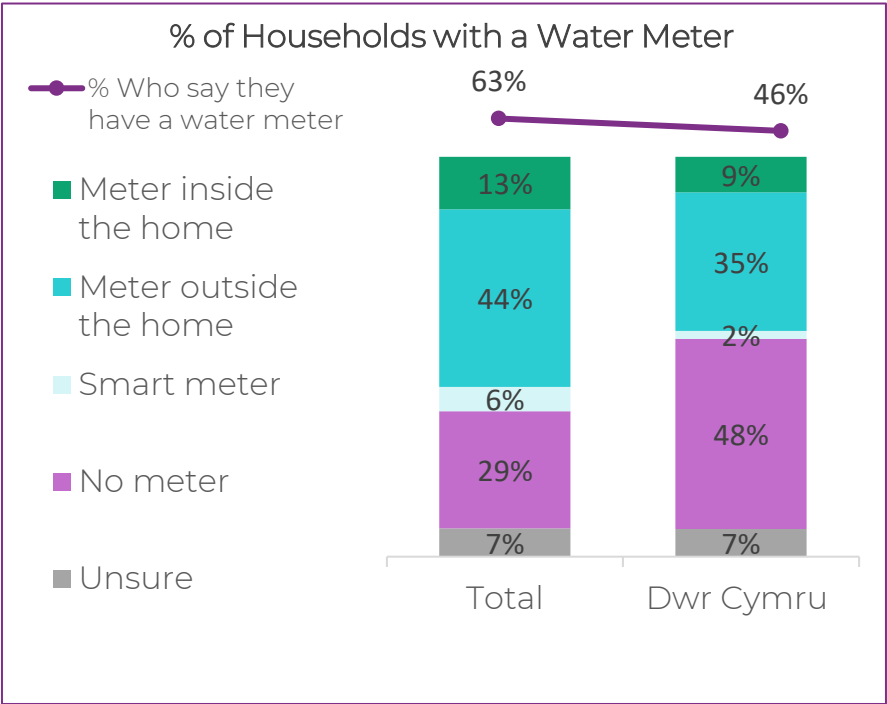
For those not currently on the Priority Services Register for water, 5% of Dŵr Cymru community members think they should be on it.

Water Meters

Dŵr Cymru community members are less likely than the norm to have a water meter. Compared to the norm, they are less likely to have a meter inside the home, a meter outside the home and a smart meter.

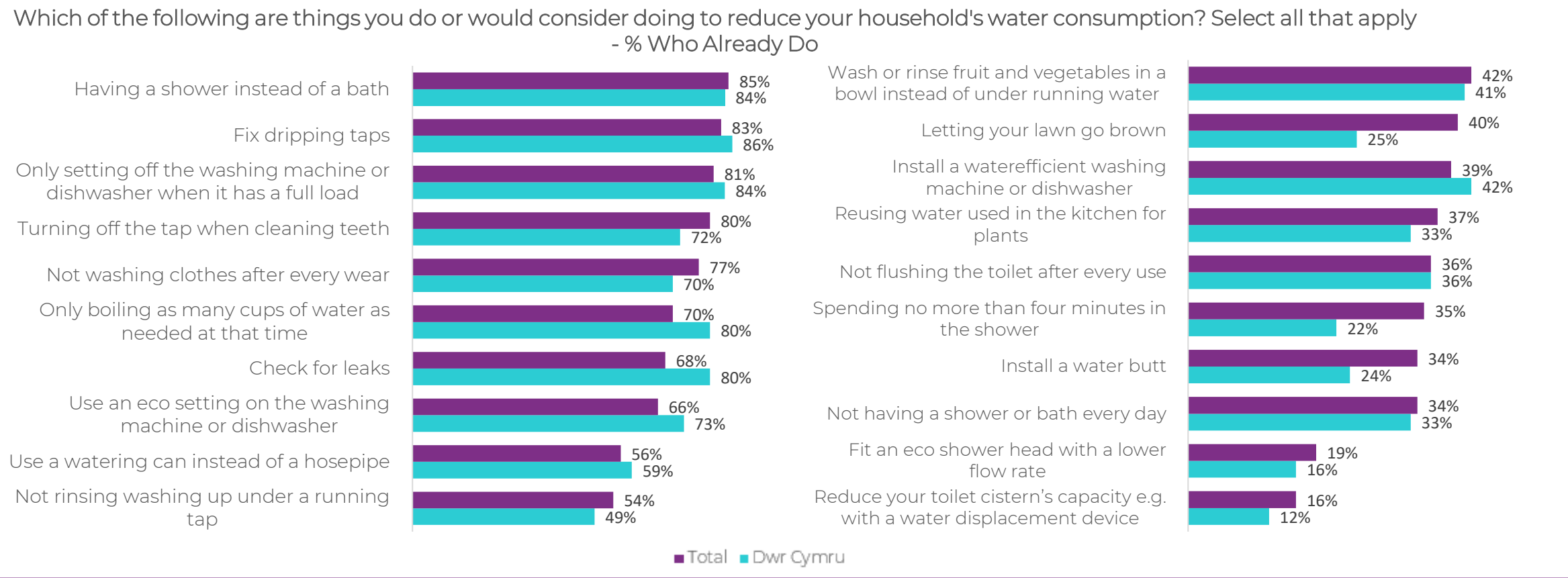
Among Dŵr Cymru community members who have a water meter, 76% already had a water meter installed in the property when they moved in (above the norm).

67% of Dŵr Cymru community members know that households can have a smart water meter installed. This is above the norm.



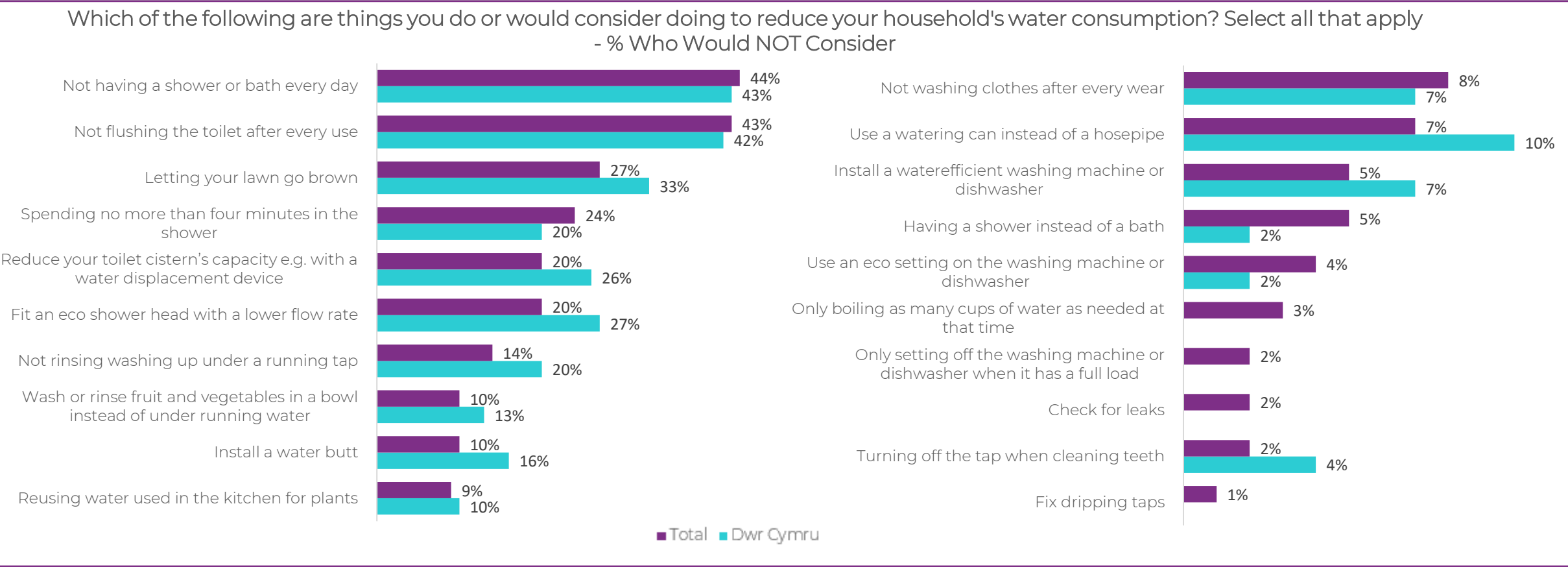
Water-Saving Measures

The majority of Dŵr Cymru community members (and a higher number compared to the norm) are already fixing dripping taps, only setting off the washing machine or dishwasher when it has a full load, only boiling as many cups of water as needed, and checking for leaks.



Water-Saving Measures

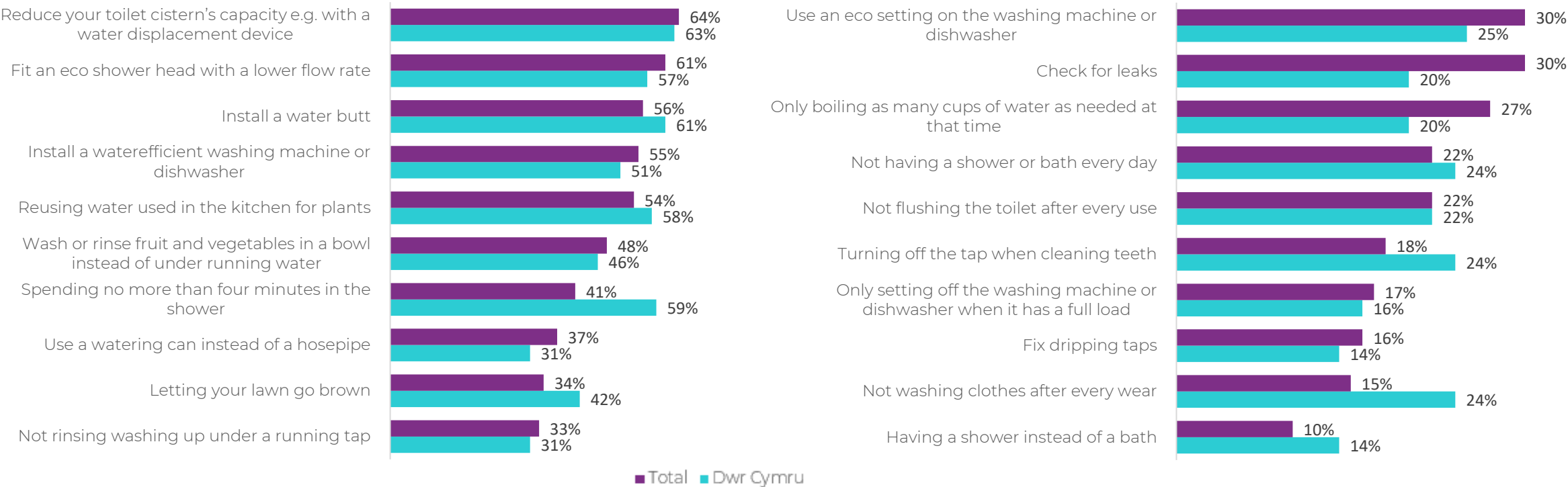
For Dŵr Cymru community members, the water-saving measures generating the greatest resistance are not having a shower or bath every day and not flushing the toilet after every use (on par with the norm).



Water-Saving Measures

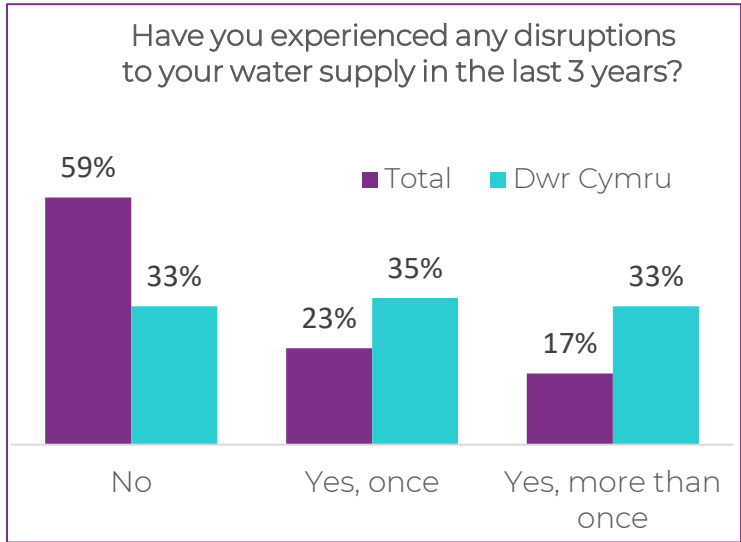
For Dŵr Cymru community members, the highest levels of openness are to reducing the toilet cistern's capacity, installing a water butt, and spending no more than four minutes in the shower.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who WOULD Consider

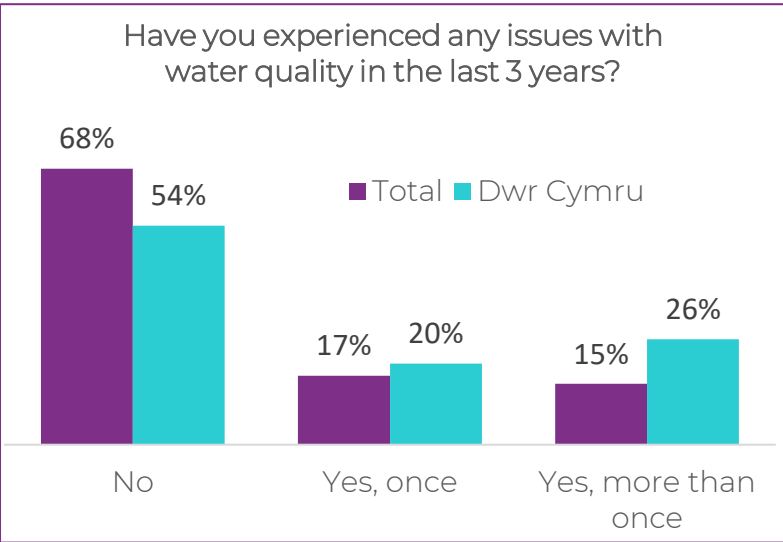


Disruptions & Issues

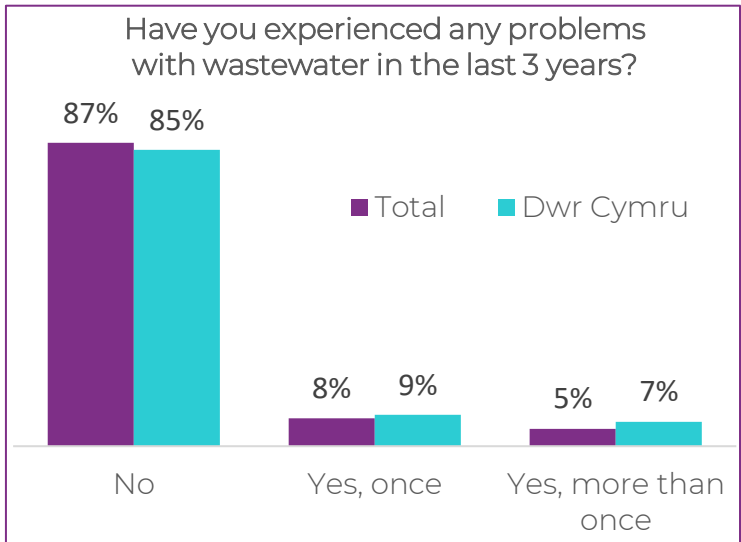
33% of Dŵr Cymru community members say they have not experienced supply disruptions in the last 3 years. This is lower than the norm. 35% have had one disruption and 33% have had a disruption more than once (above the norm).



54% of Dŵr Cymru community members say they have had no issues with water quality in the last 3 years (below the norm). 20% have had one issue and 26% more than one issue (above the norm).

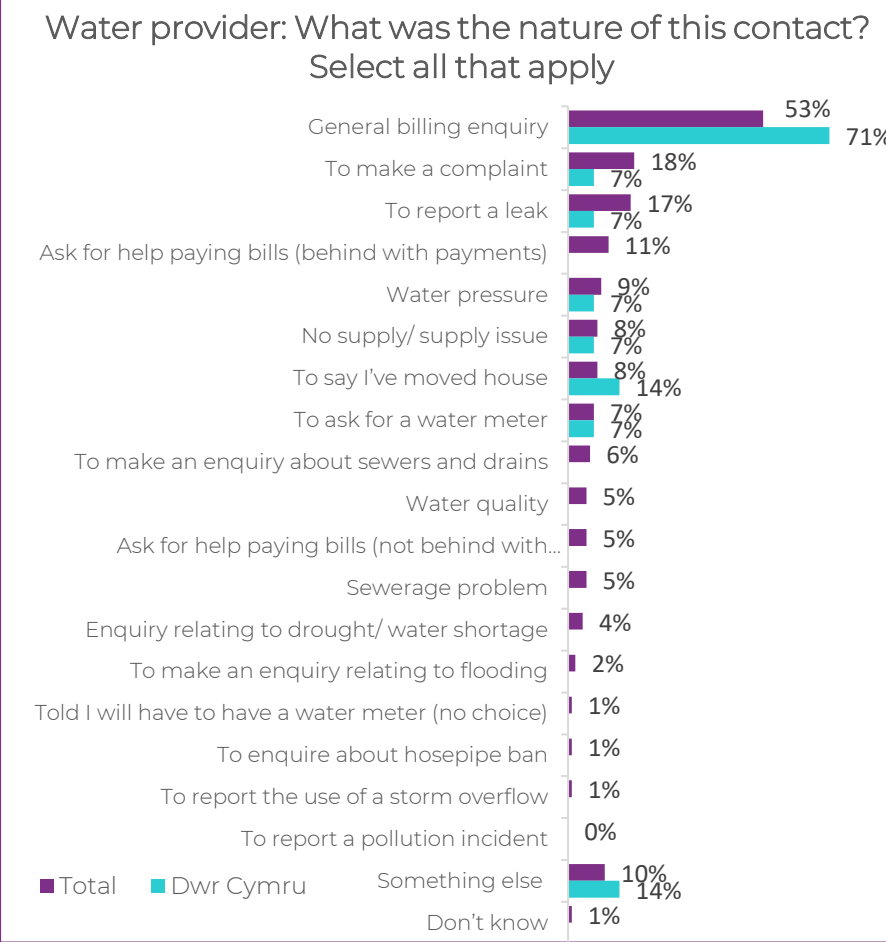
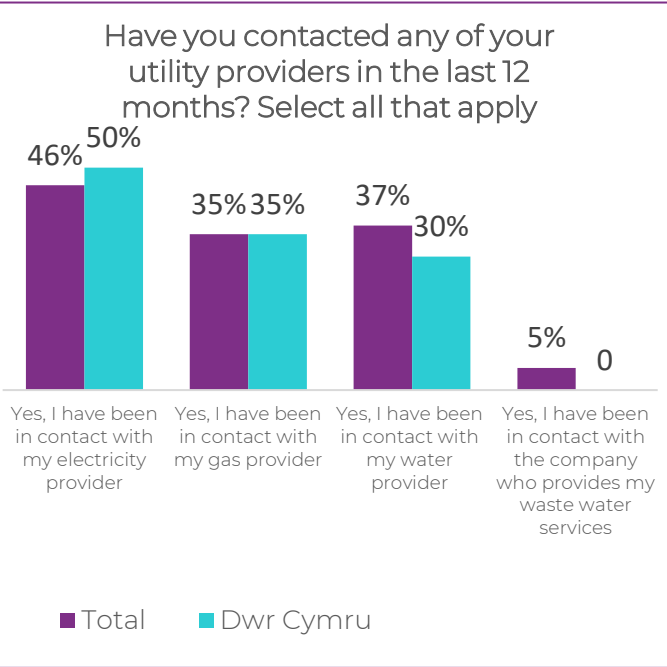


85% of Dŵr Cymru community members say they have had no problems in the last 3 years with wastewater (marginally lower than the norm). 9% have once had an issue and 7% have had an issue more than once.

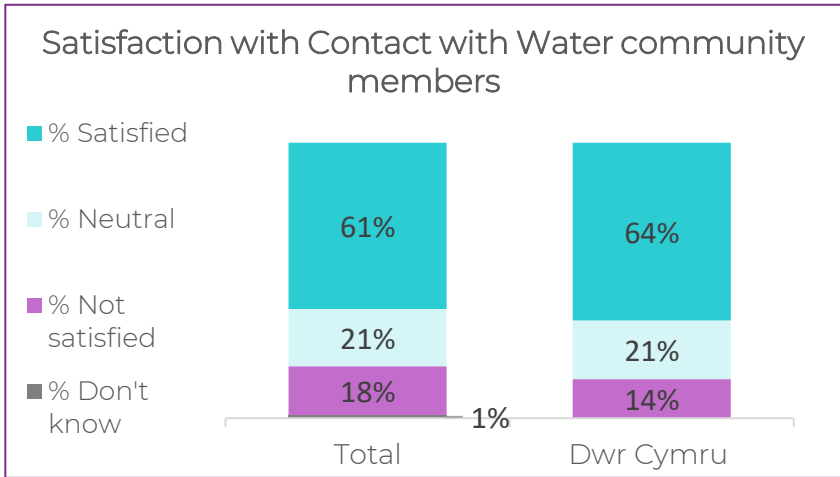


Contact with utility providers

30% of community members have been in contact with Dŵr Cymru in the last 12 months. This is slightly below the norm.



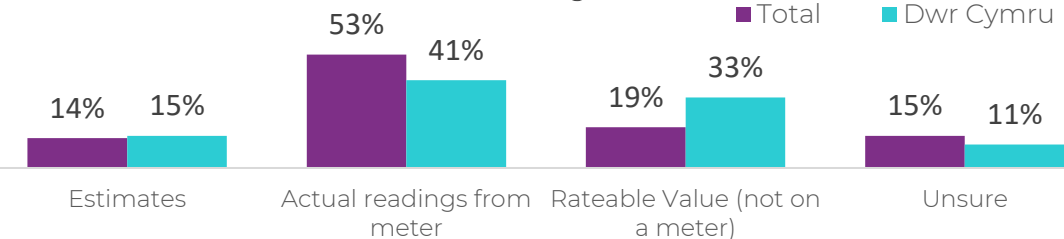
Billing enquiries are the main reason for contacting Dŵr Cymru. This is higher than the norm. Saying they have moved house was selected by 14% of Dŵr Cymru community members who made contact, a slightly higher than the norm of 8%. 64% of Dŵr Cymru community members who made contact were satisfied with that contact. This is slightly higher than the norm.



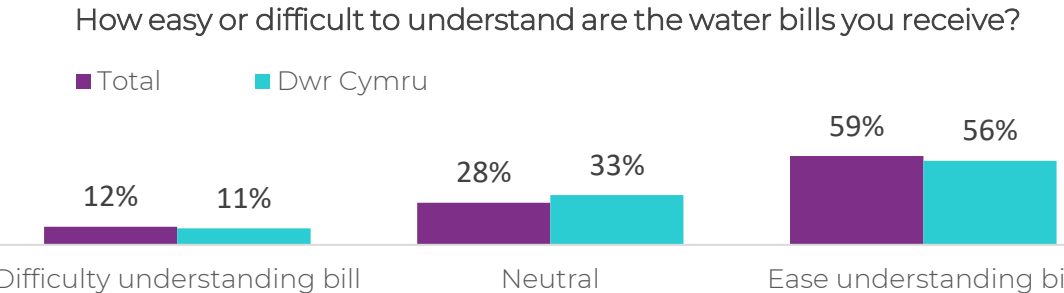
Billing

Dŵr Cymru community members are more likely than the norm to have their water bills based on rateable value and less likely to have actual meter readings as the base.

Are the bills you receive from your water company estimates or from actual readings?

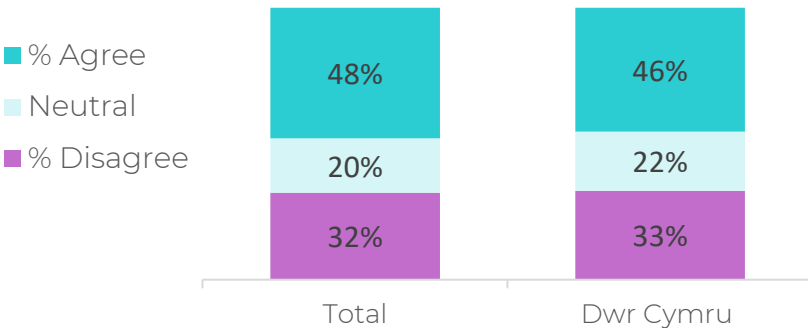


56% of Dŵr Cymru community members say they find it easy to understand their water bills, slightly below the norm.



How much do you agree or disagree with the following statements?

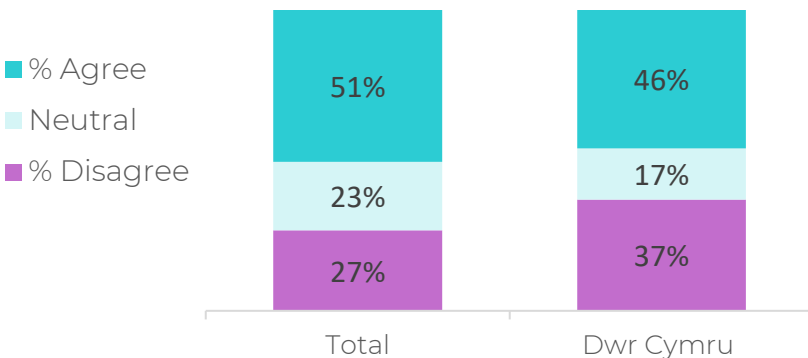
I fully understand how my water bill is calculated



46% of Dŵr Cymru community members feel they understand how their water bill is calculated, marginally below the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



Dŵr Cymru community members are more likely than the norm to disagree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' 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

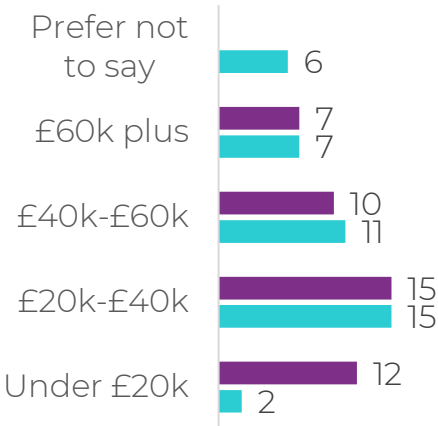


Hafren Dyfrdwy community members: n=41
There are 9 Welsh speakers within this community with 2 members speaking Welsh as their first language and 2 have requested & been sent the survey in Welsh.

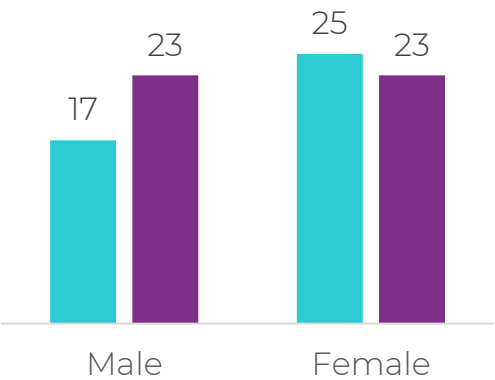
Inclusivity



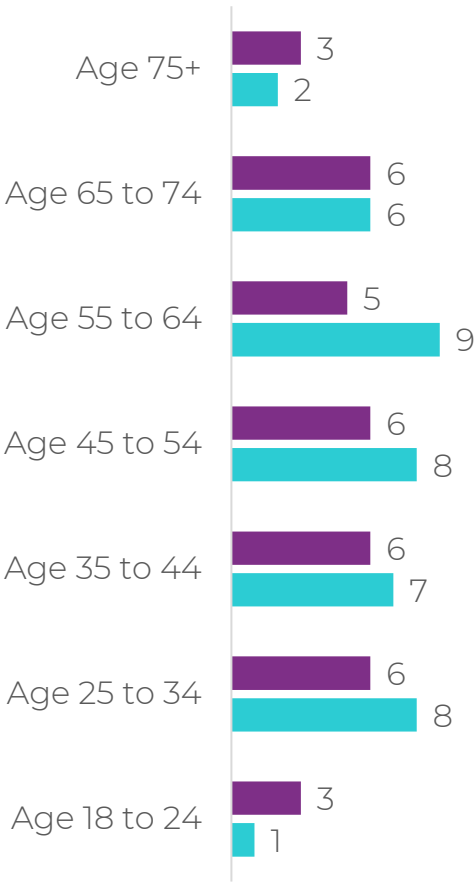
Household income



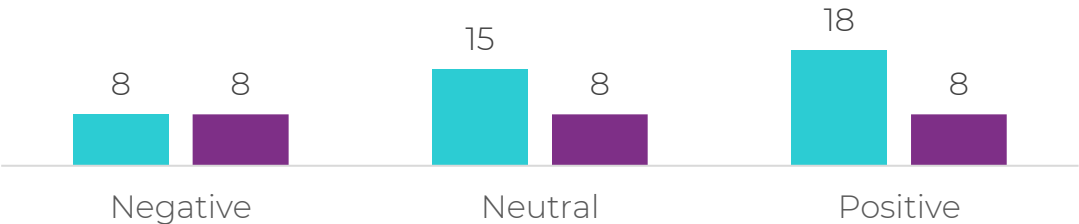
Gender



Age



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 we were able to reach our financially vulnerable community members 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 Male, 18-24 & 75+ sample by at least 2 for next month.

Current Quota Minimum Quota

Hafren Dyfrdwy

What do Hafren Dyfrdwy community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Improving water services:** strong emphasis on practical service improvements, improving water supply, safety and quality.
- **Environmental & sustainability:** cleaner waterways, rivers, lakes and seas; end sewage discharge and other pollution.
- **Being heard & influencing change:** strong need for community members to be genuinely listened to, they want a meaningful voice in decision-making.
- **Accountability & transparency:** ensure companies act responsibly and openly, with water companies taking accountability for failures.
- **Communication & understanding:** improved two-way communication, clearer explanations of problems and solutions, and a better understanding of how water processes work.



What Hafren Dyfrdwy community members have said...

“More effective communication with customers and highlight problem areas.” Female, 55, Lives alone

“That the water company takes accountability for any issues and improves there services by listening to real life issues.” Female, 27, Lives alone

“I hope it will steer the water companies in the right direction to improve our water and stop overcharging customers and prevent their neglect from poisoning our wildlife and our pets who bathe and play and live in these waterways.”
Female, 65, Lives with partner



Hafren Dyfrdwy community members want to drive meaningful improvements in water services, environmental protection, and company accountability, while ensuring community member voices genuinely influence decision-making. They emphasise transparent communication, responsible management, and a cleaner, safer water environment for communities now and in the future.

Active community members
Total Base Size: 755
Hafren Dyfrdwy Water Base Size: 41

Water Use at Home



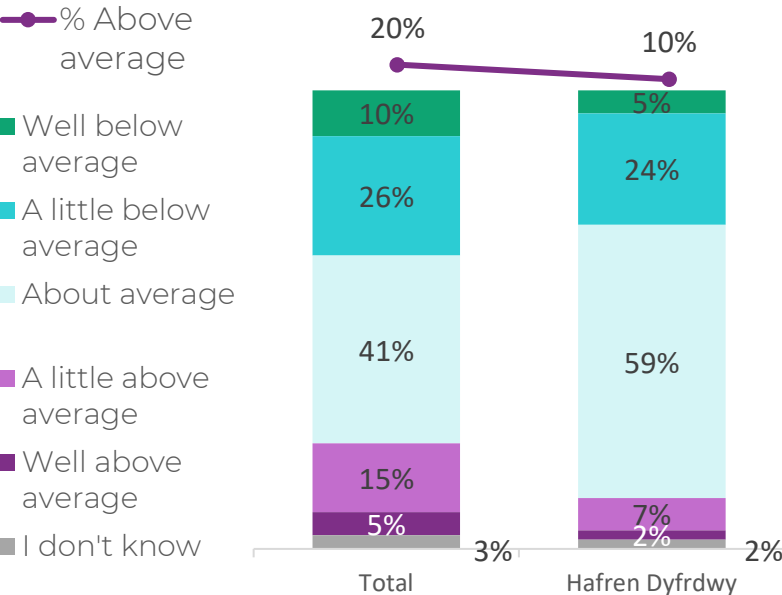
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The voice for water consumers
Llais defnyddwyr dŵr

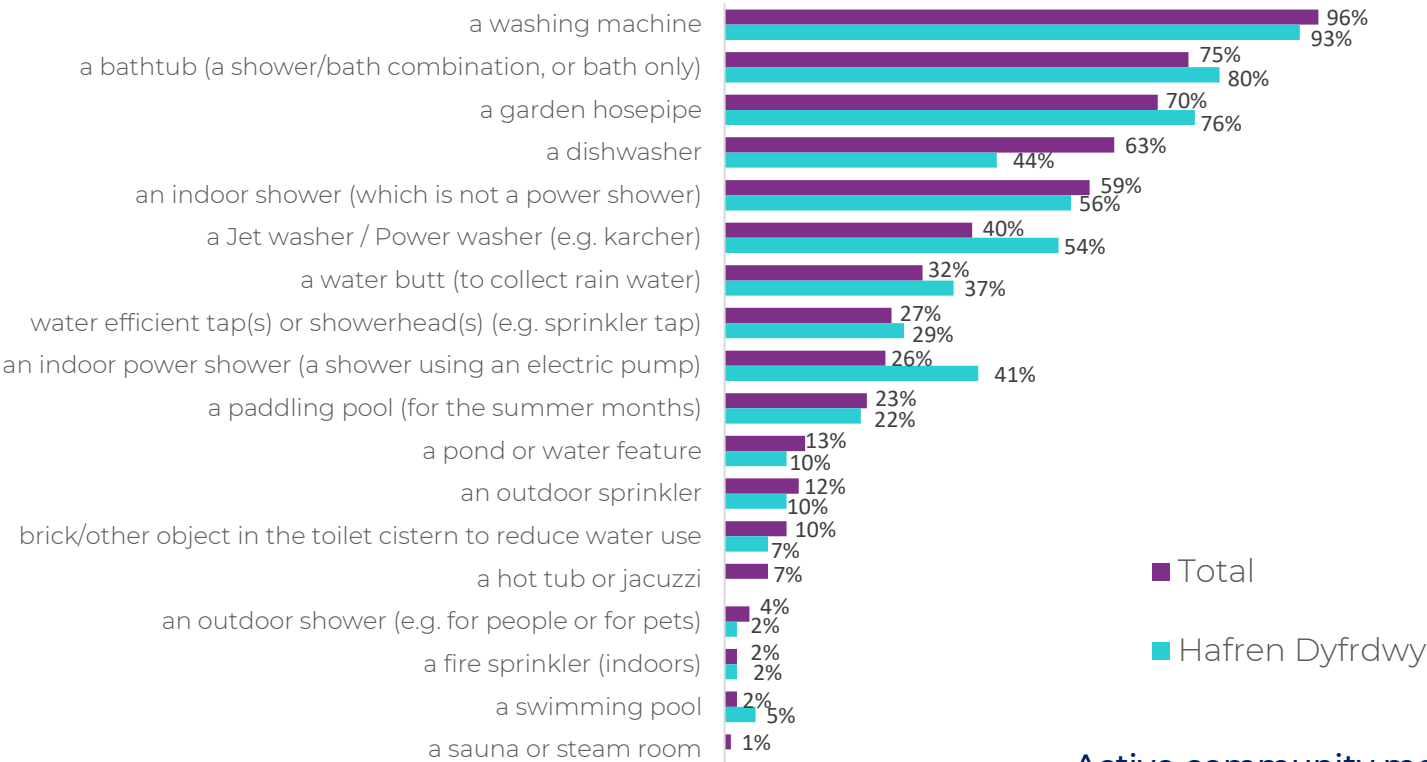
Hafren Dyfrdwy community members are more likely than the norm to report that their water consumption is “about average”. They are less likely to report that their water consumption is “above average”, with 7% saying it is “a little above average” and 2% saying it “well above average”.

In a typical week, how much water would you say your household uses vs a similar household?



Hafren Dyfrdwy community members are more likely to have a jet washer/power washer and an indoor power shower. They are also slightly more likely than the norm to have a bathtub, a garden hosepipe, a water butt, and a swimming pool.

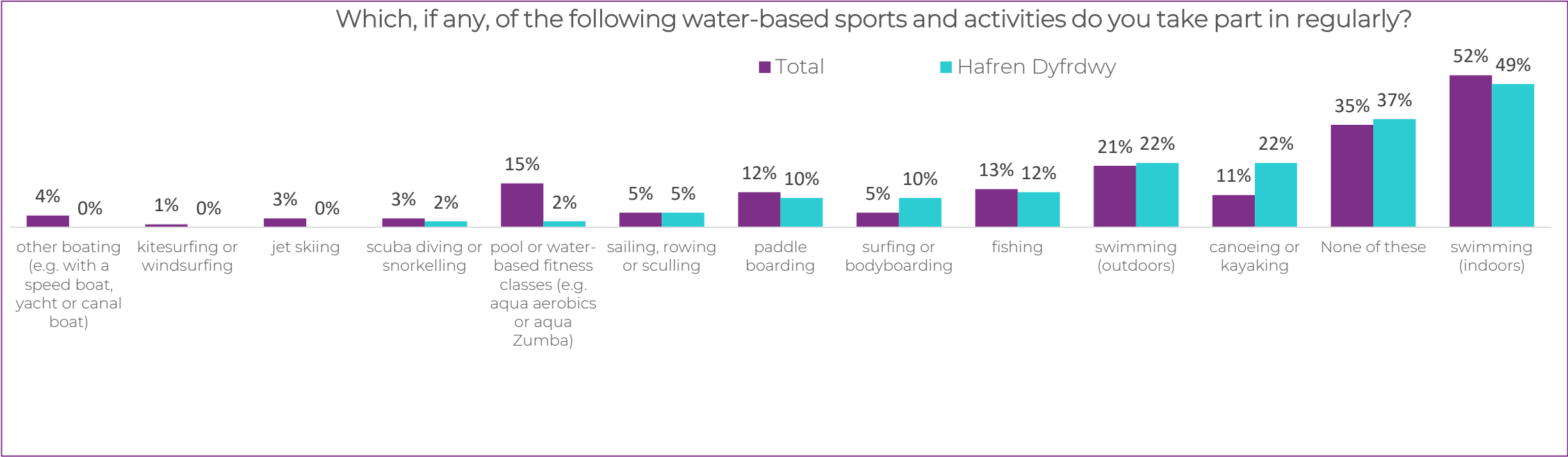
Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Active community members
Total Base Size: 755
Hafren Dyfrdwy Water Base Size: 41

Water Locations & Activities

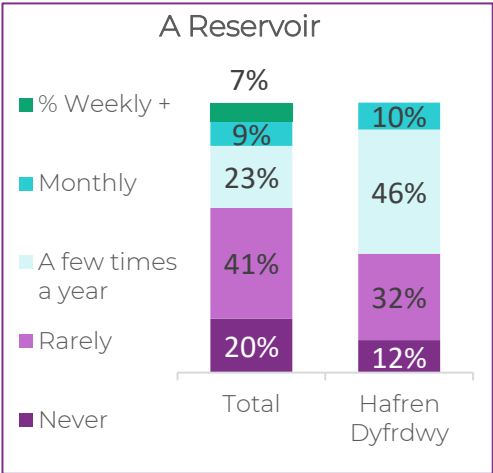
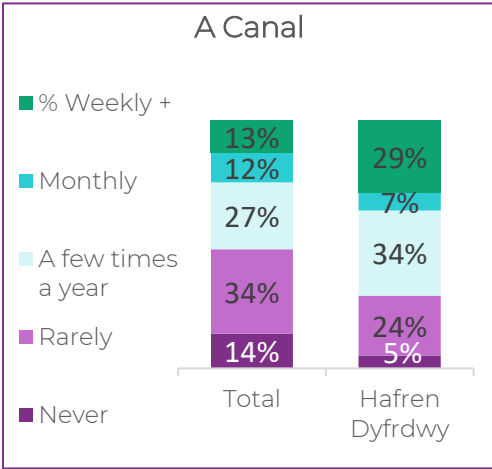
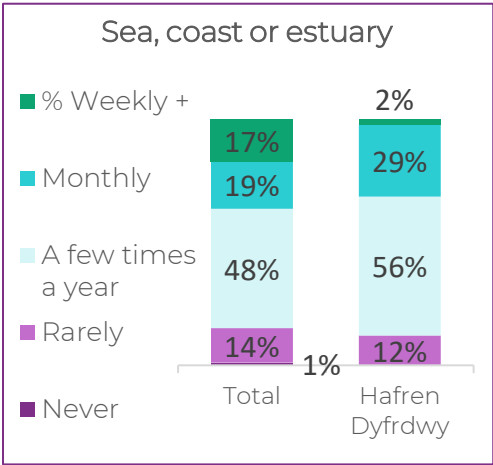
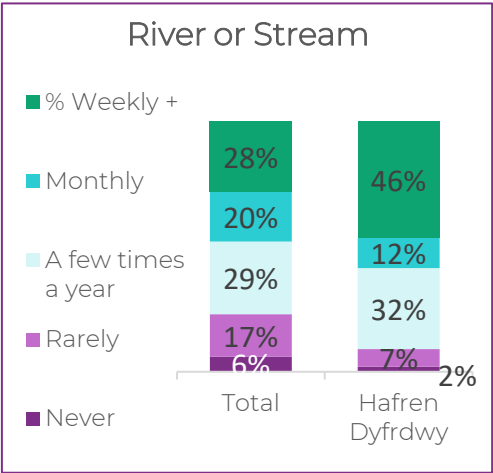
Swimming (indoors) is the most common water-based activity for Hafren Dyfrdwy community members, although this is slightly below the norm. They are more likely than the norm to take part in canoeing or kayaking and surfing or bodyboarding.



Water Locations & Activities

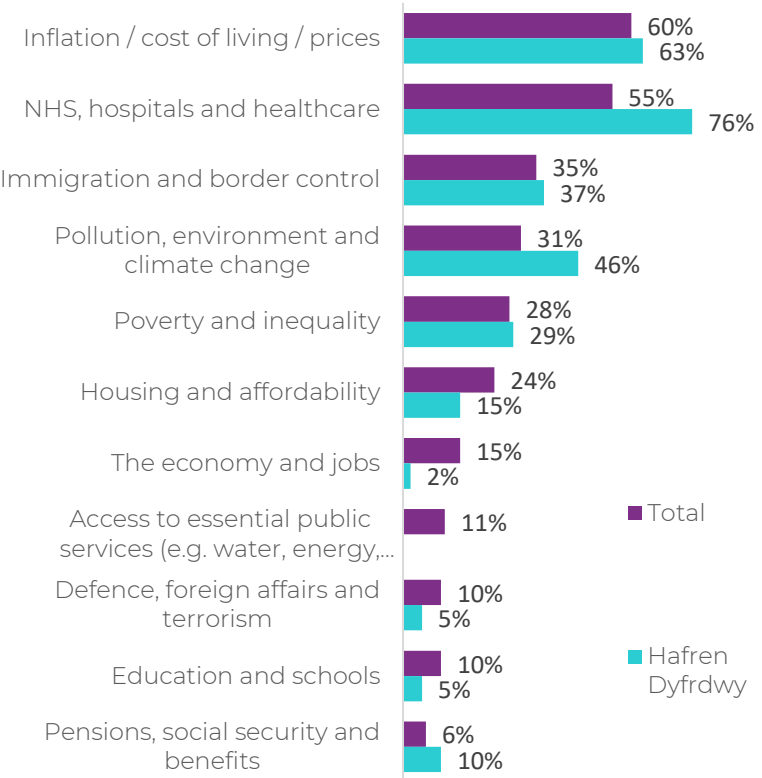
Hafren Dyfrdwy community members are more likely than the norm to visit a river, stream, or canal weekly and less likely to visit a reservoir, or the sea, coast or estuary weekly.

How often, if at all, do you spend time by or on the water at any of these places shown below?

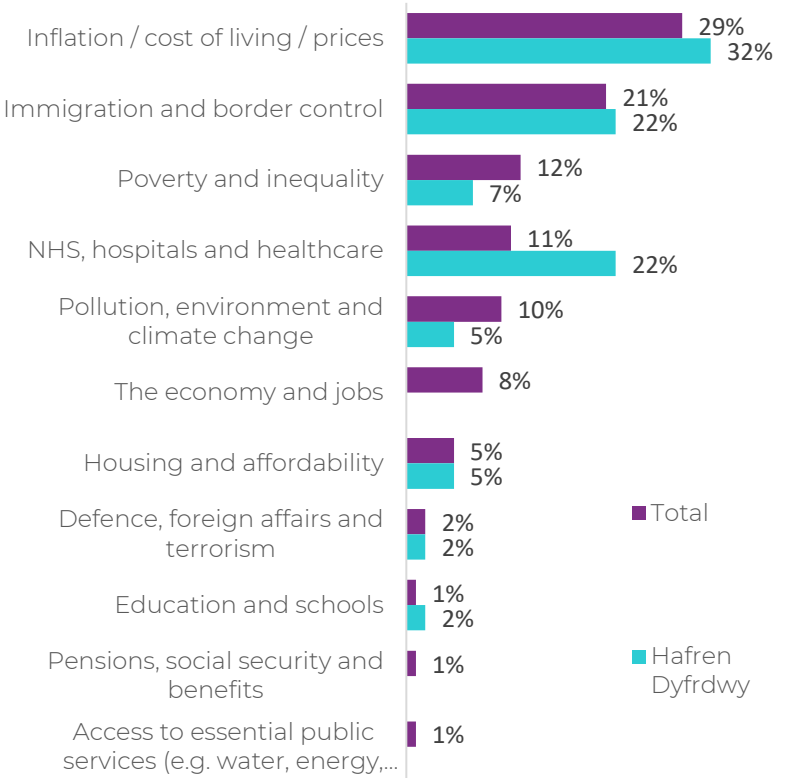


UK Issues

All Issues Facing the UK
- Select up to two



ONE Main issue Facing the UK



Hafren Dyfrdwy community members have told us their top issue is:

- Inflation / cost of living / prices

This is slightly above the norm.

Immigration and border control, and NHS, hospitals and healthcare rank as joint second single biggest issues. While the former is on par with the norm, the second is above the norm (NHS, hospitals and healthcare rank fourth for the total).

Hafren Dyfrdwy community members are less likely than the norm to select poverty and inequality, and pollution, environment and climate change as single biggest issues.

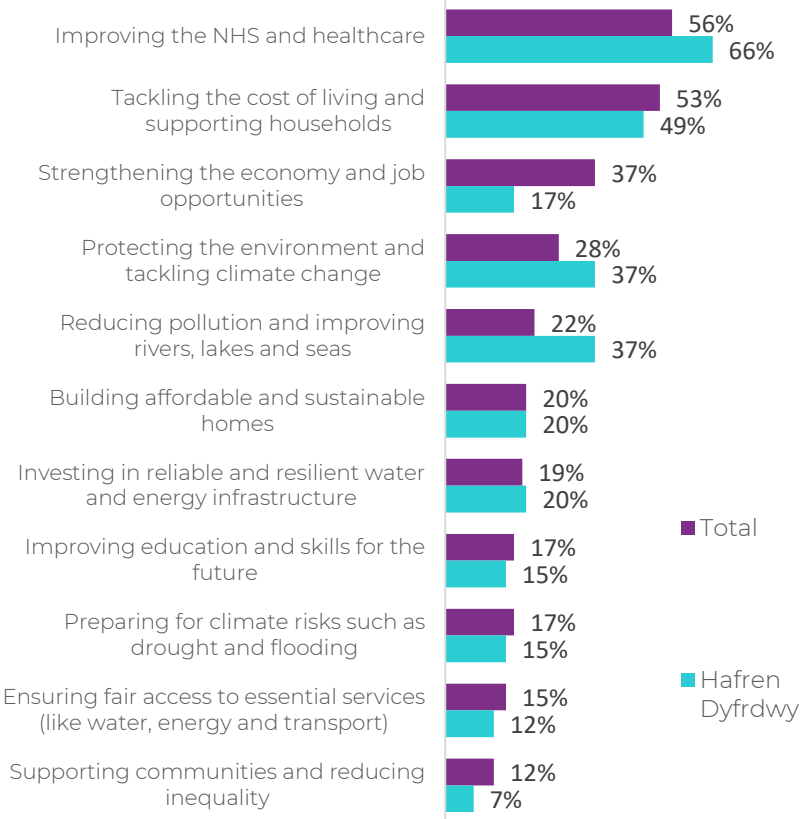
UK Priorities



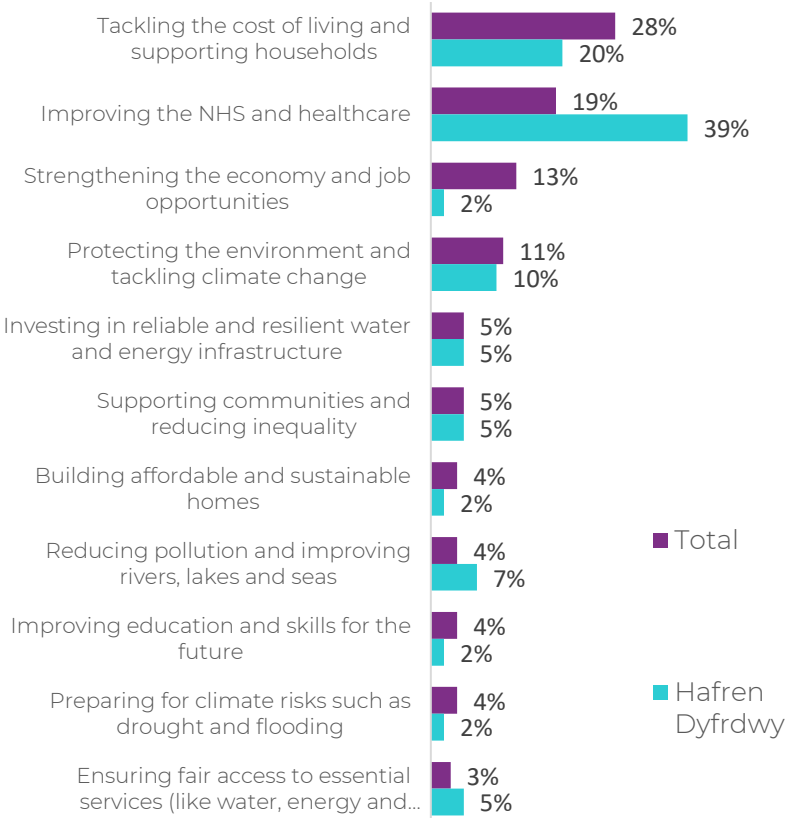
Hafren Dyfrdwy community members rank improving the NHS and healthcare as top priority. This is above the norm. The second top priority is tackling the cost of living and supporting households (below the norm).

Hafren Dyfrdwy community members are more likely than the norm to see protecting the environment and tackling climate change, and reducing pollution and improving rivers, lakes and seas as priorities for the future.

Priorities for Government and Public Investment -
Select up to two



ONE Top National Priority



Environment Concerns

Including Saving Water & Energy



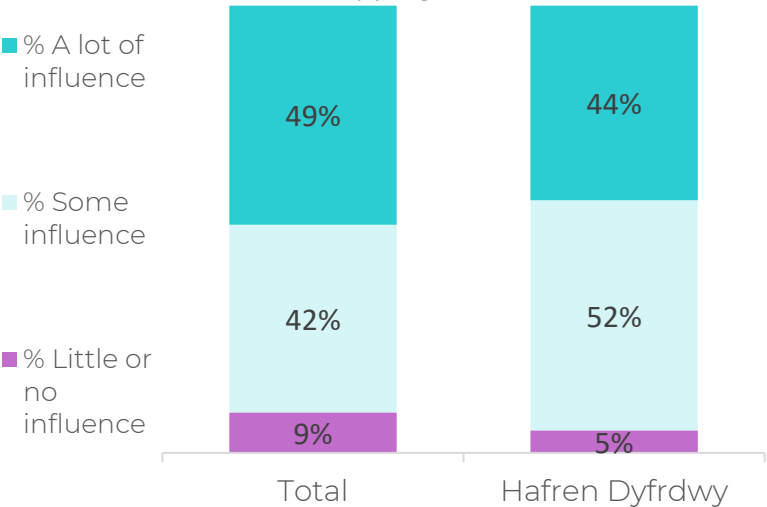
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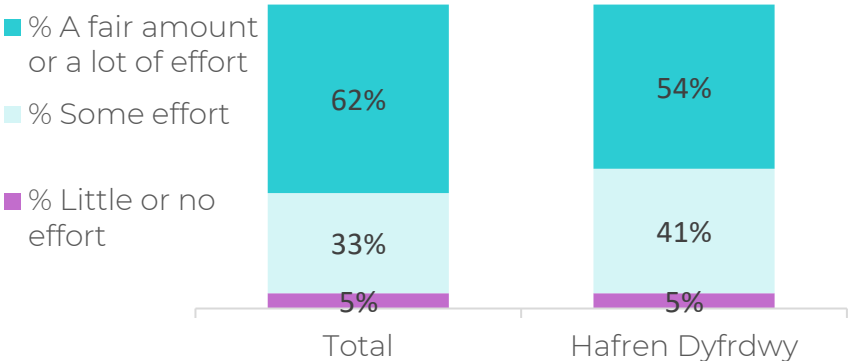
The voice for water consumers
Llais defnyddwyr dŵr

Hafren Dyfrdwy community members are slightly less likely than the norm to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

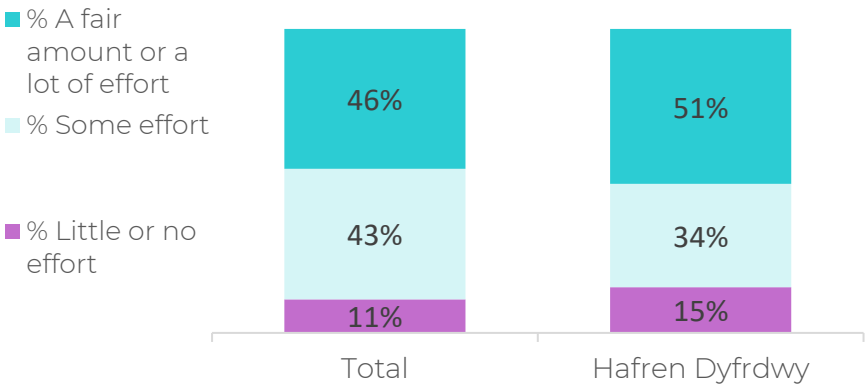


How much effort does your household make at home to save ENERGY?



54% of Hafren Dyfrdwy community members say they make a fair amount or a lot of effort to save energy. This is slightly below the norm.

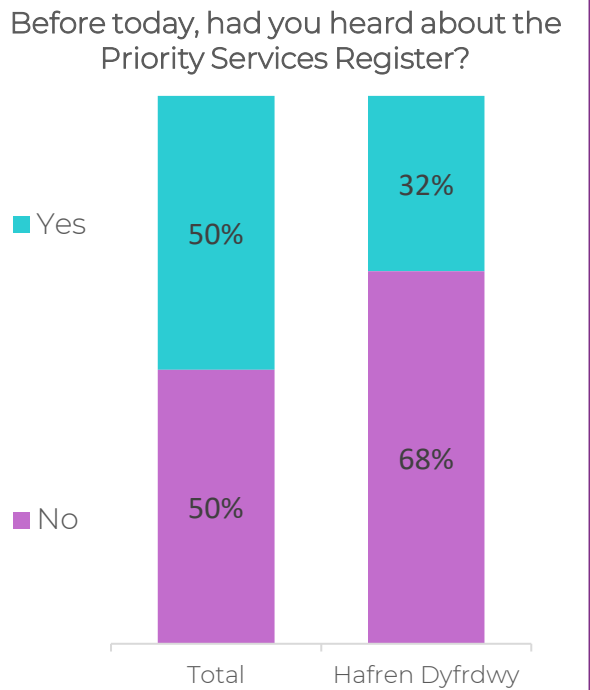
How much effort does your household make at home to save WATER?



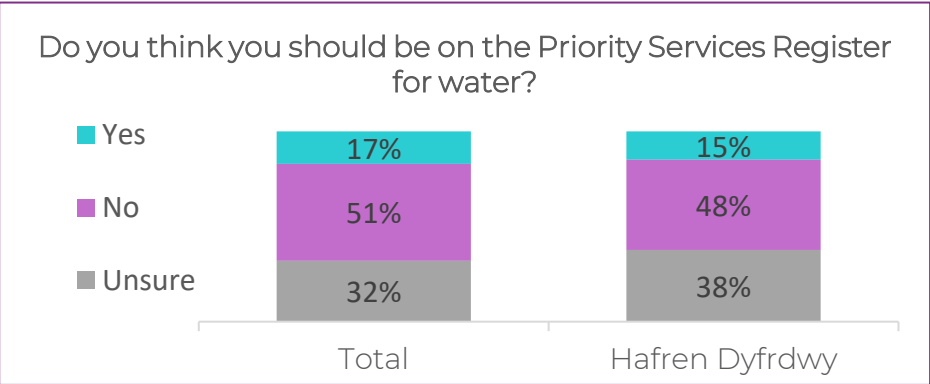
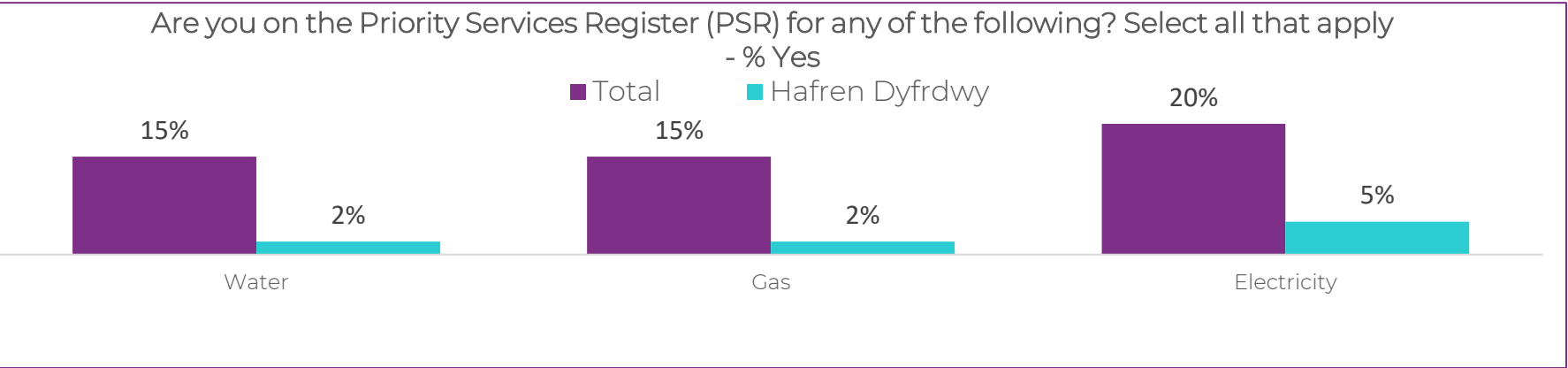
Hafren Dyfrdwy community members are slightly more likely to say they make a fair amount or a lot of effort to save energy than to save water than the norm.

Priority Services Register

Overall, 32% of Hafren Dyfrdwy community members say they have heard of the Priority Services Register.



A higher proportion of Hafren Dyfrdwy community members say they are on the Priority Services Register for electricity than for gas or water. They are less likely to be on the registers compared to the norm.



For those not currently on the Priority Services Register for water, 15% of Hafren Dyfrdwy community members think they should be on it.

Water Meters



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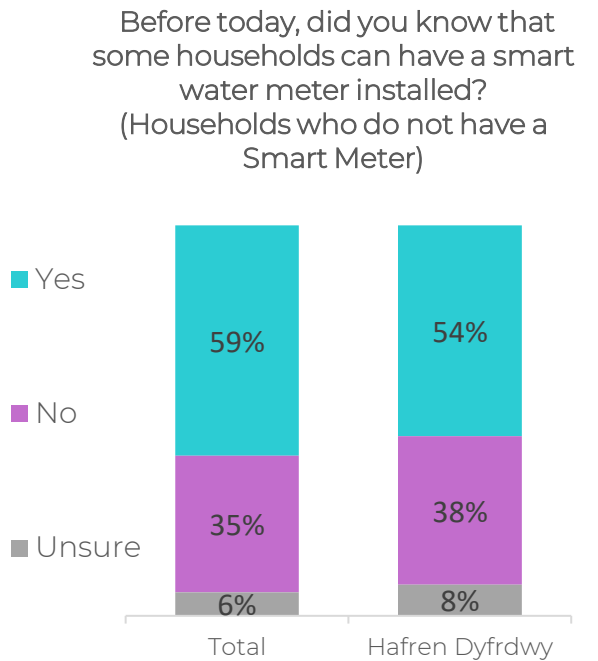
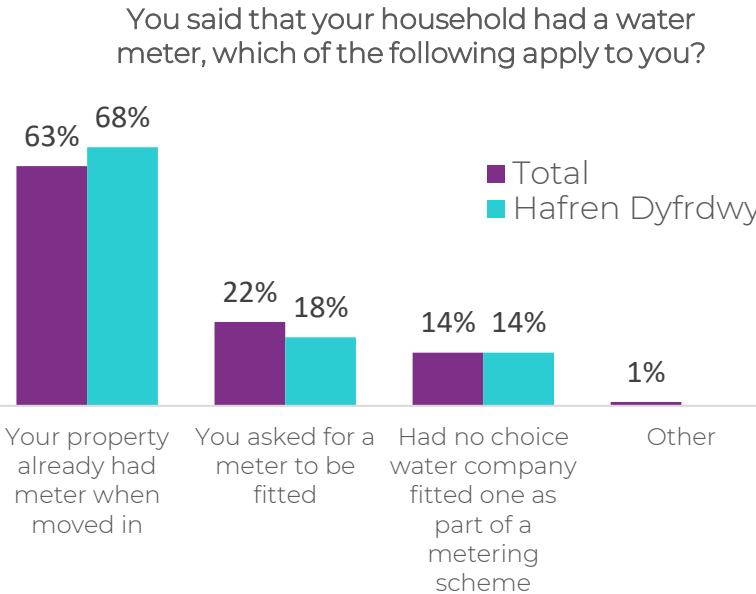
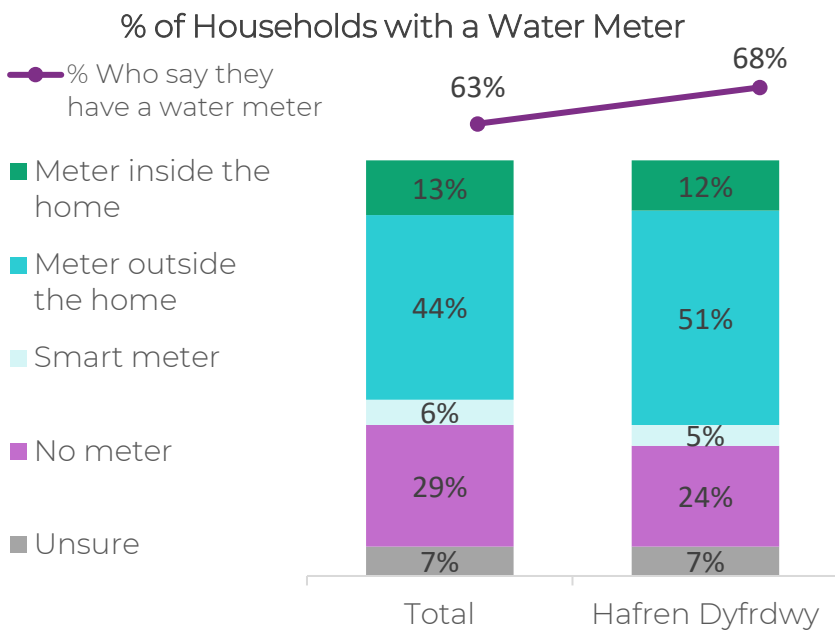


The voice for water consumers
Llais defnyddwyr dŵr

Hafren Dyfrdwy community members are slightly more likely than the norm to have a water meter. They are slightly more likely to have a meter outside the home compared to the norm.

Among Hafren Dyfrdwy community members who have a water meter, 68% already had a meter installed in the property when they moved in. This is slightly above the norm.

54% of Hafren Dyfrdwy community members know that households can have a smart water meter installed (slightly below the norm).

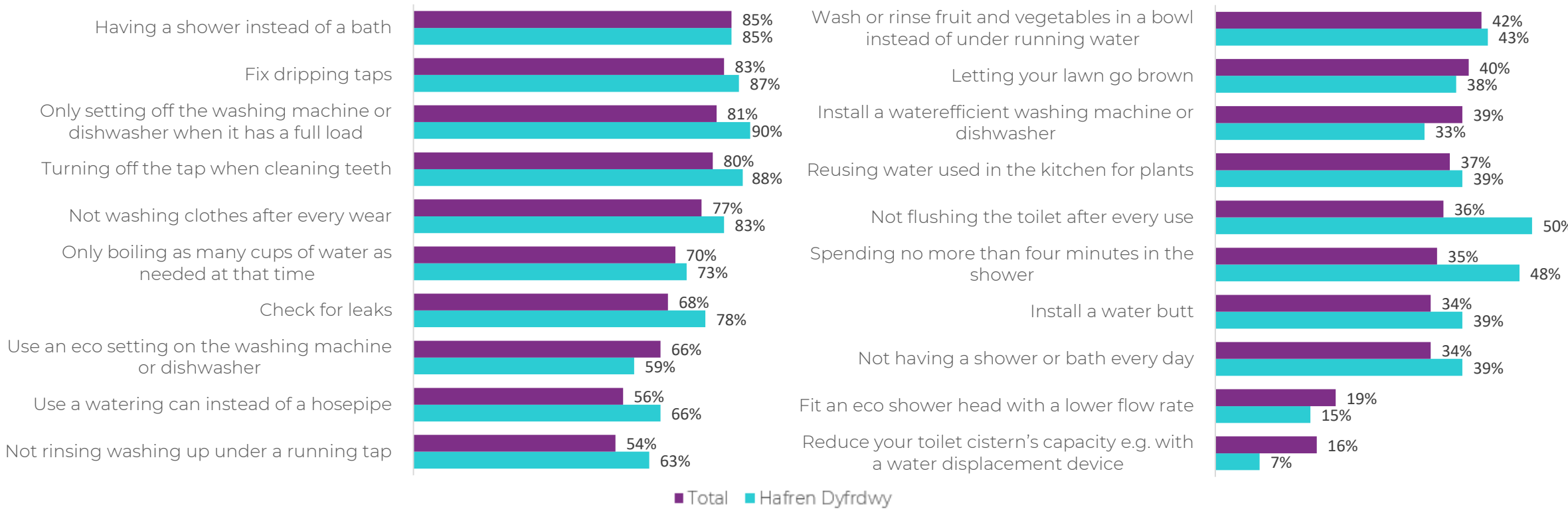


Water-Saving Measures



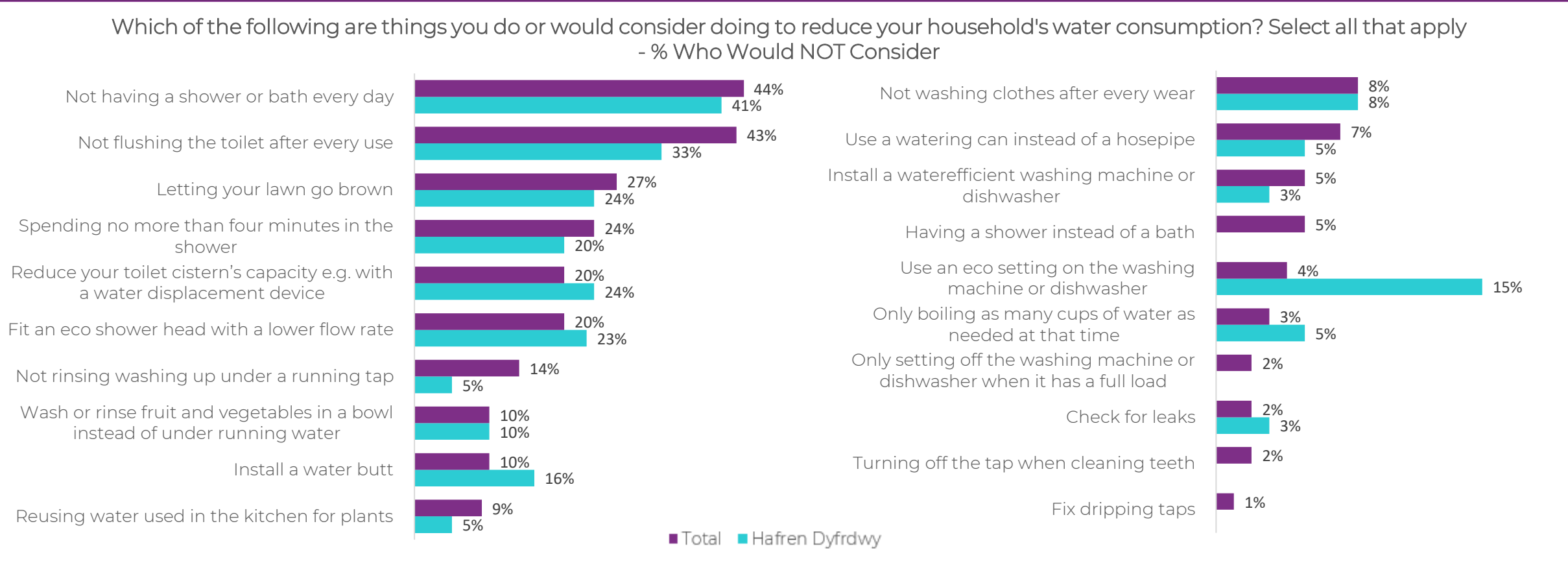
The majority of Hafren Dyfrdwy community members (and a higher number compared to the norm) say they are already only setting off the washing machine or dishwasher when it has a full load, turning off the tap when cleaning teeth, and fixing dripping taps. They are also more likely than the norm to not flush the toilet after every use and to spend no more than four minutes in the shower.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who Already Do



Water-Saving Measures

For Hafren Dyfrdwy community members, the water-saving measures generating the greatest resistance are not having a shower or bath every day, not flushing the toilet after every use, and letting the lawn go brown.

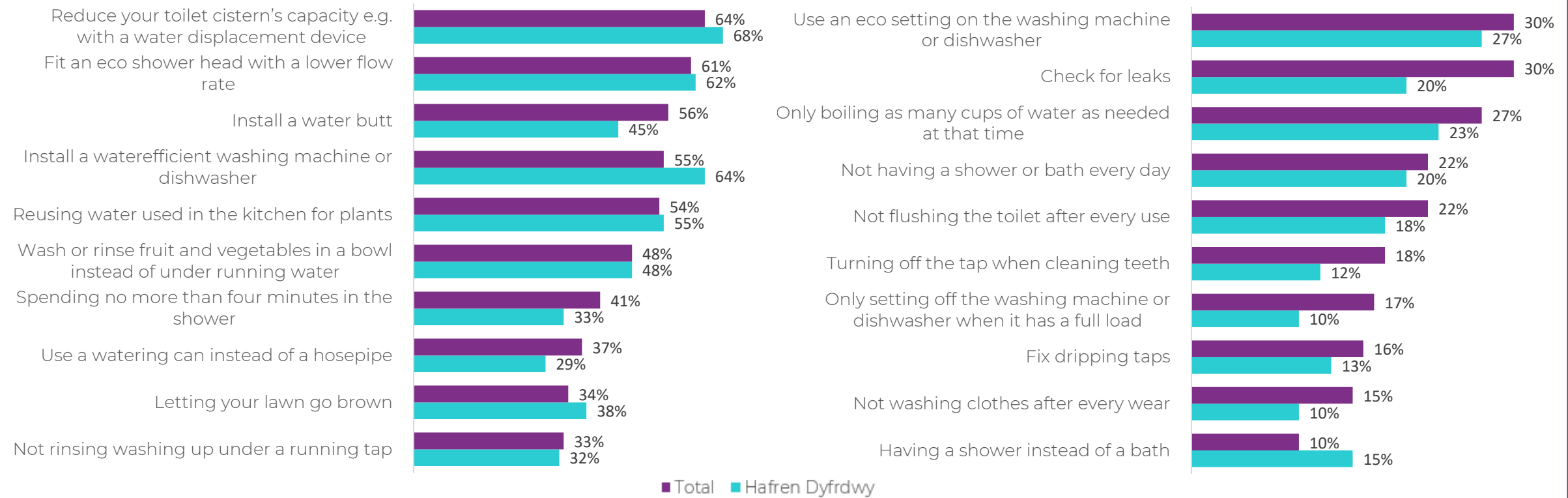


Water-Saving Measures



For Hafren Dyfrdwy community members, the highest levels of openness are to reducing the toilet cistern’s capacity, installing a water-efficient washing machine or dishwasher, and fitting an eco shower.

Which of the following are things you do or would consider doing to reduce your household's water consumption? Select all that apply
- % Who WOULD Consider



Disruptions & Issues



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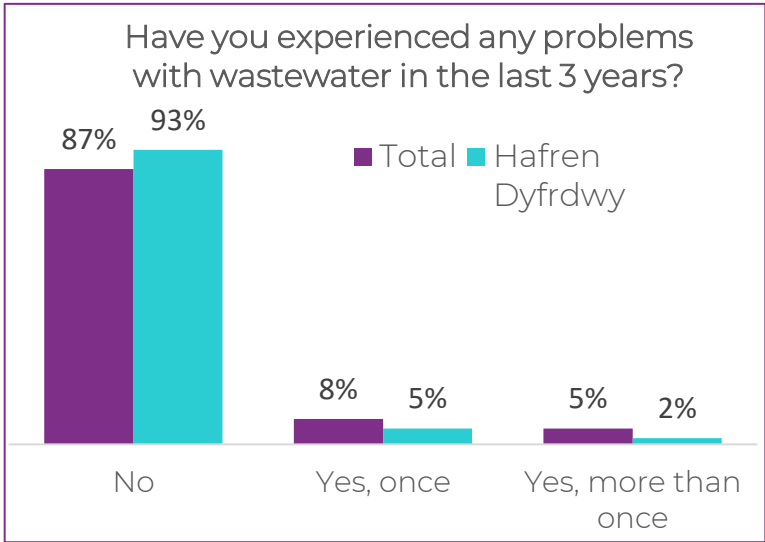
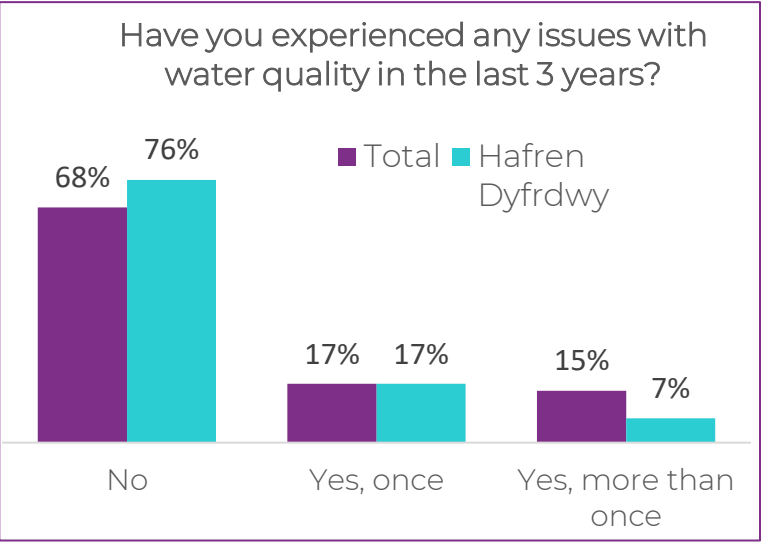
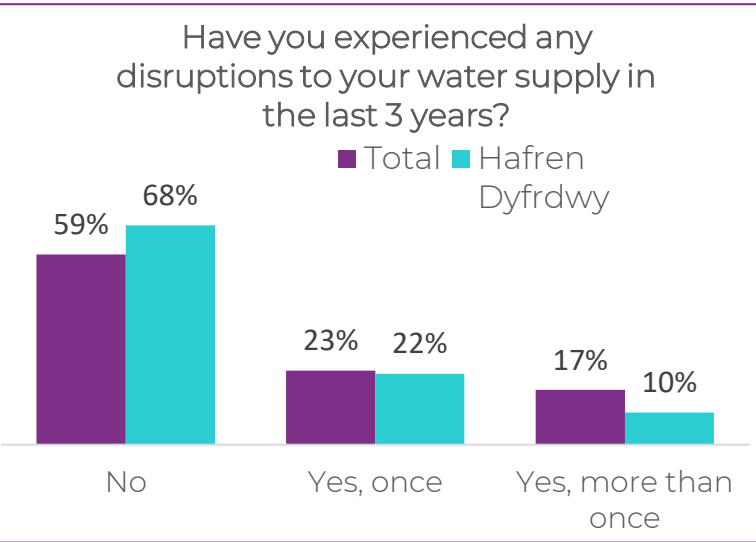


The voice for water consumers
Llais defnyddwyr dŵr

68% of Hafren Dyfrdwy community members say they have not experienced supply disruptions in the last 3 years (higher than the norm). 22% have had one disruption. 10% have had a disruption more than once (slightly below the norm).

76% of Hafren Dyfrdwy community members say they have had no issues with water quality in the last 3 years, which is above the norm. 17% have had one issue. 7% have had more than one issue (below the norm).

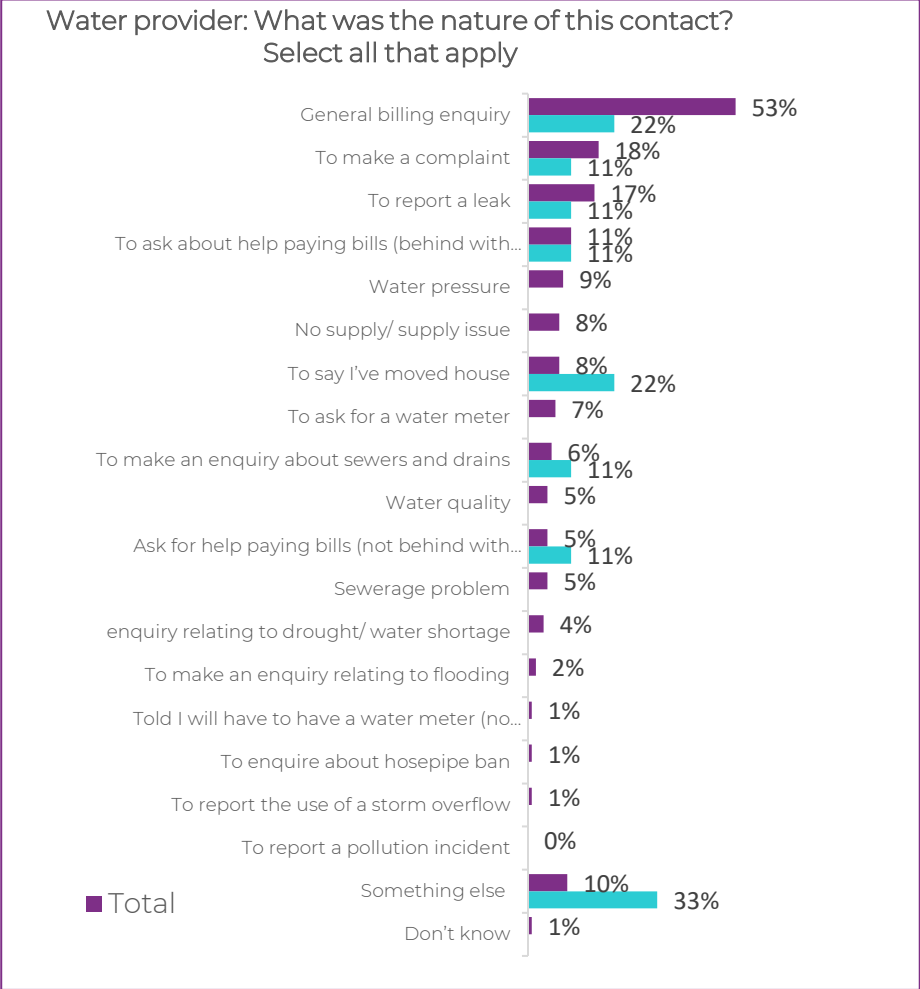
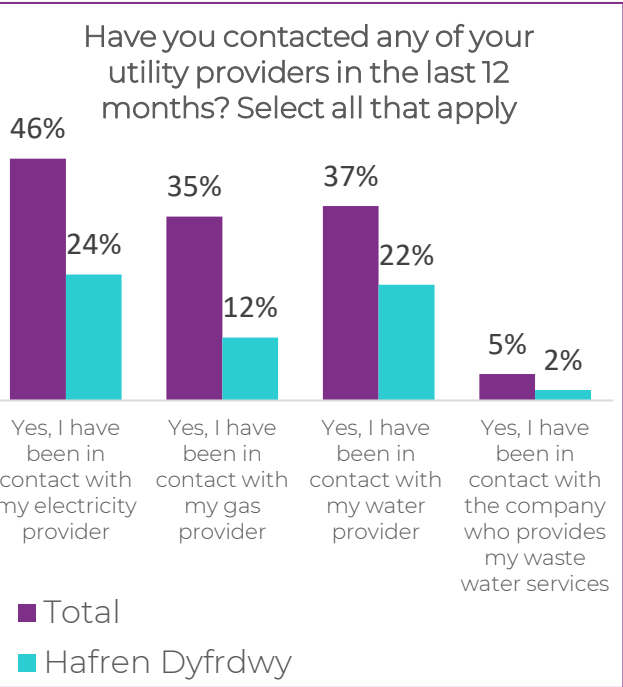
93% of Hafren Dyfrdwy community members say they have had no problems in the last 3 years with wastewater (slightly above the norm). 5% have once had an issue and 2% have had an issue more than once.



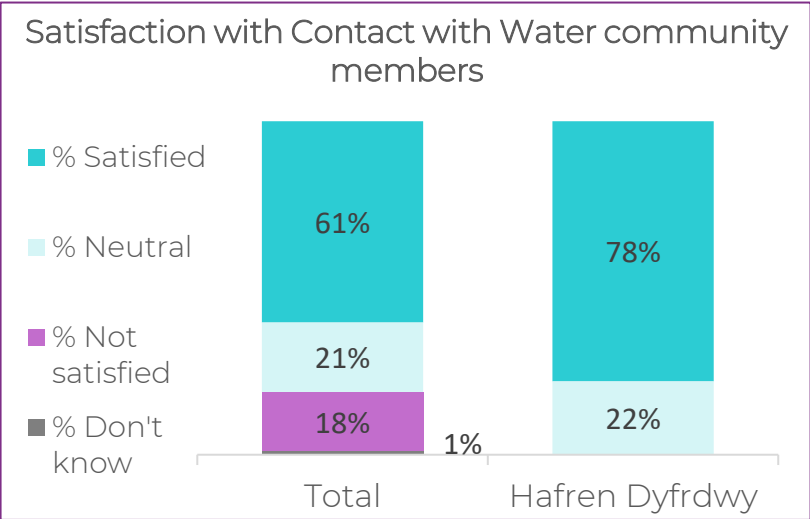
Contact with utility providers



22% of community members have been in contact with Hafren Dyfrdwy in the last 12 months. This is below the norm.



Billing enquiries and communicating a house move are the two main reasons for contacting Hafren Dyfrdwy. Communicating a house move is by a higher number compared to the norm (22% vs 8%). 78% of Hafren Dyfrdwy community members who made contact were satisfied with that contact. This is higher than the norm. 0% stated they were not satisfied.



Billing

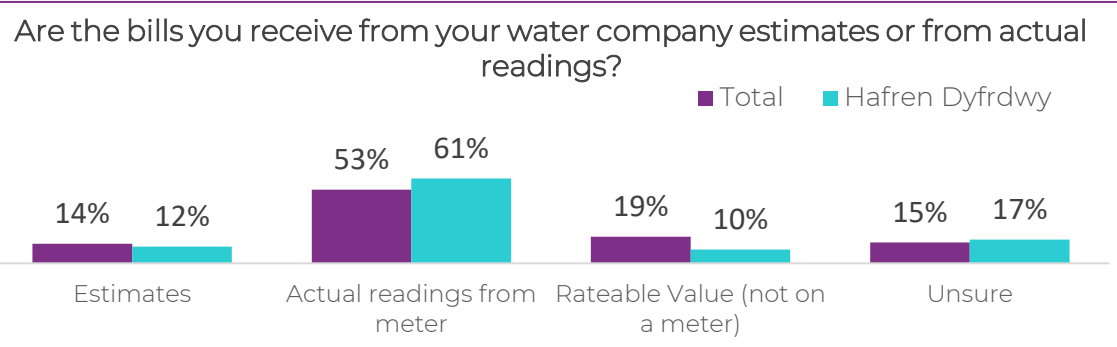


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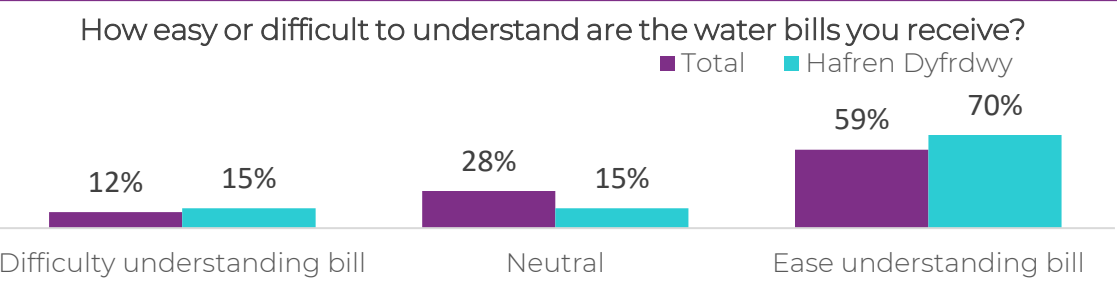


The voice for water consumers
Llais defnyddwyr dŵr

Hafren Dyfrdwy community members are more likely than the norm to have their water bills based on actual meter readings and less likely to have rateable value as the base.

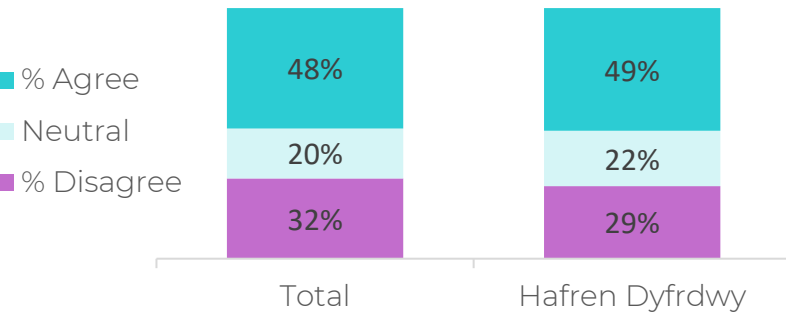


70% of Hafren Dyfrdwy community members say they find it easy to understand their water bills, above the norm.



How much do you agree or disagree with the following statements?

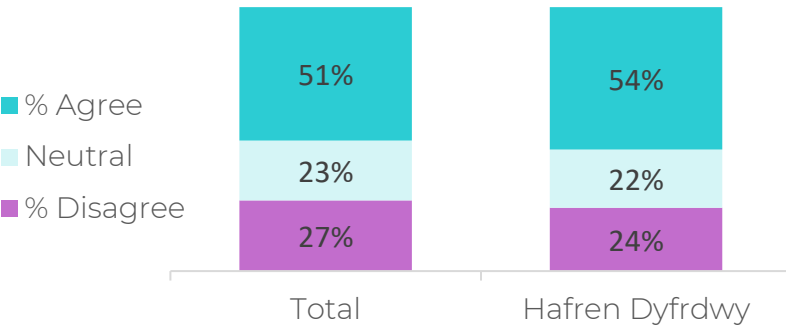
I fully understand how my water bill is calculated



49% of Hafren Dyfrdwy community members feel they understand how their water bill is calculated, on par with the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



Hafren Dyfrdwy community members are slightly more likely than the norm to agree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Affinity Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

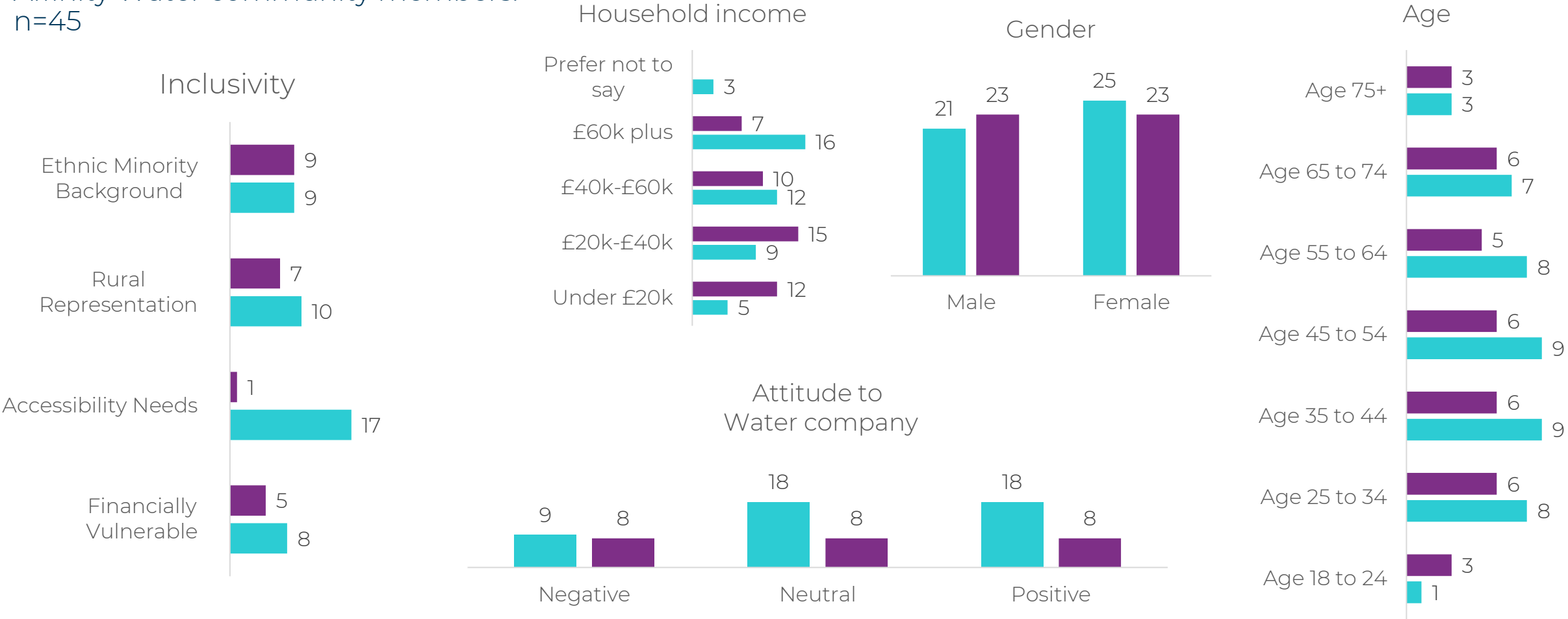
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Affinity Water

Community population



Affinity 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 we were able to reach our financially vulnerable community members 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 18-24 sample by at least 2 for next month.

Current Quota Minimum Quota

Affinity Water

What do Affinity Water community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Strengthen community member voice:** a desire for the community to give real weight to consumer experiences, ensuring community member voices are being genuinely heard and acted upon.
- **Improving services, infrastructure & water quality:** better, more reliable water services and improvements to infrastructure. Cleaner, safer water and reduced pollution.
- **Transparency, understanding and education:** increased clarity about how the sector operates including understanding how water companies run and what they do, insight into billing and knowing where money is being spent.
- **Accountability:** holding water companies to account for performance and creating clear roadmaps for improvement.



What Affinity Water community members have said...

“An increased awareness to water companies what their consumers are experiencing.” Male, 44, Lives with partner

“More understanding about how water companies are run and what they do to provide good quality water.” Female, 71, Lives alone

“I hope the Water Voice panel helps to bring effective improvements in water services by highlighting customer needs and their concerns are genuinely reflected in decision-making.” Male, 29. Lives with partner

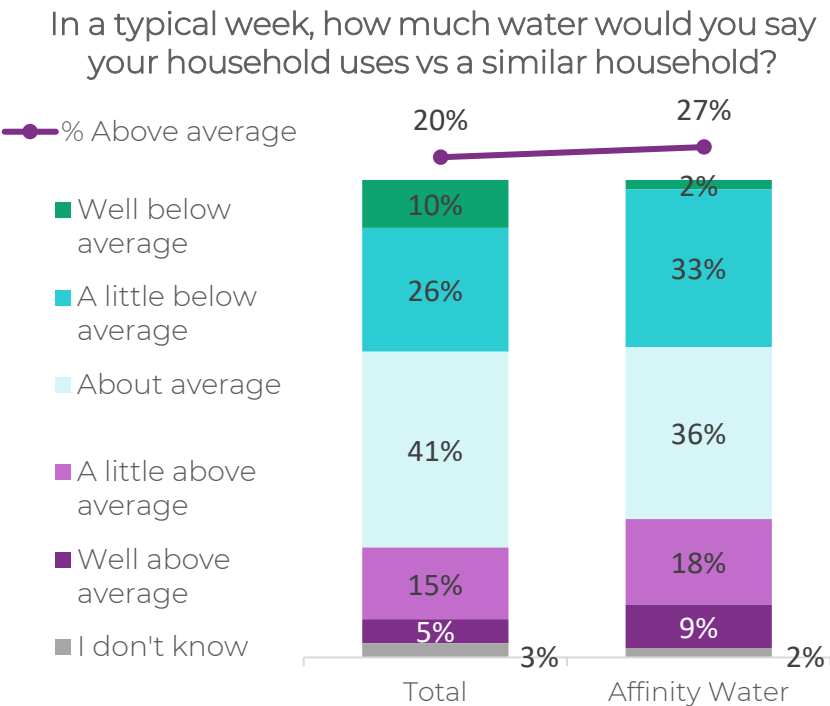


Affinity Water community members want to gather strong insights that lead to accountable, transparent, and meaningful improvements in water services, infrastructure, and environmental performance. They expect genuine listening, evidence-driven action, fairer treatment of consumers, and a shift toward public good over profit.

Active community members (Base size) 45

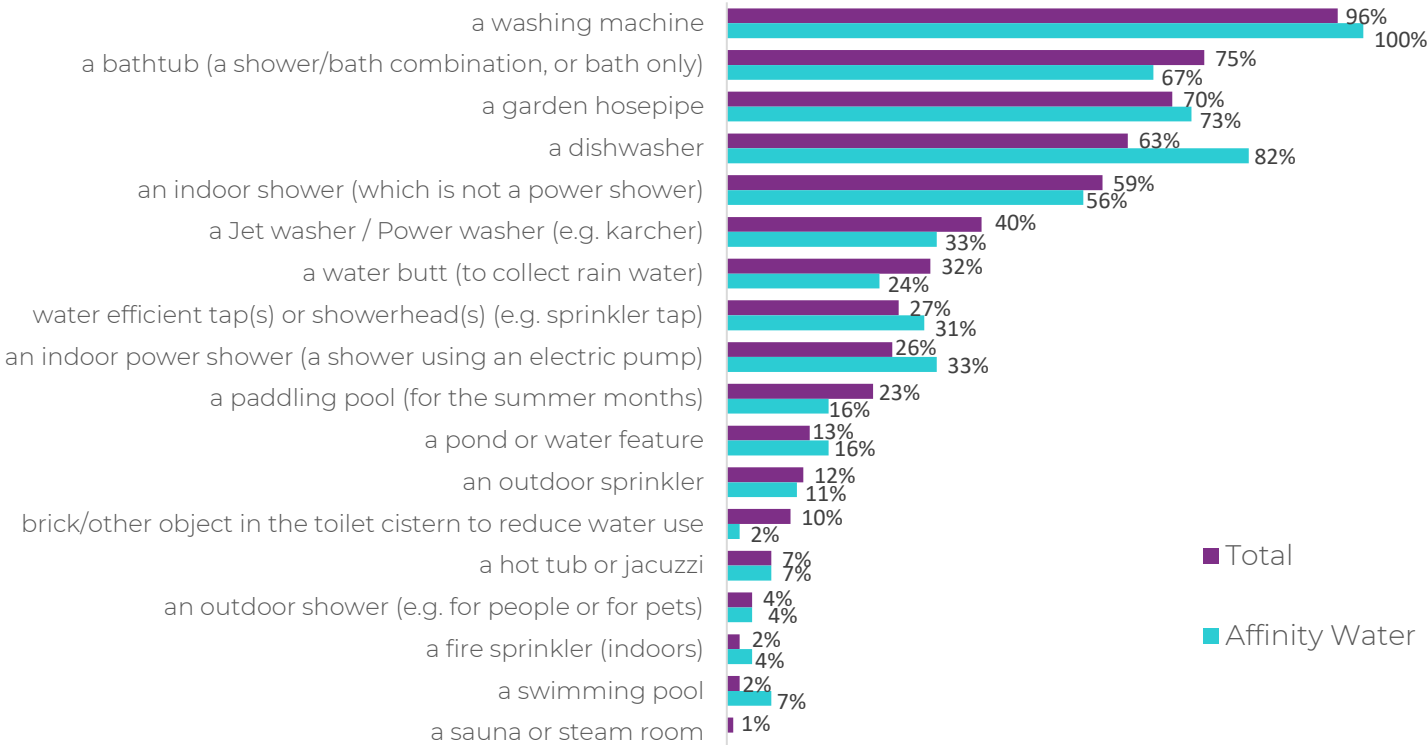
Water Use at Home

Affinity Water community members are more likely than the norm to report their water consumption as “above average”. They are also more likely to report their water consumption as “a little below average” and less likely to report it as “well below average”.



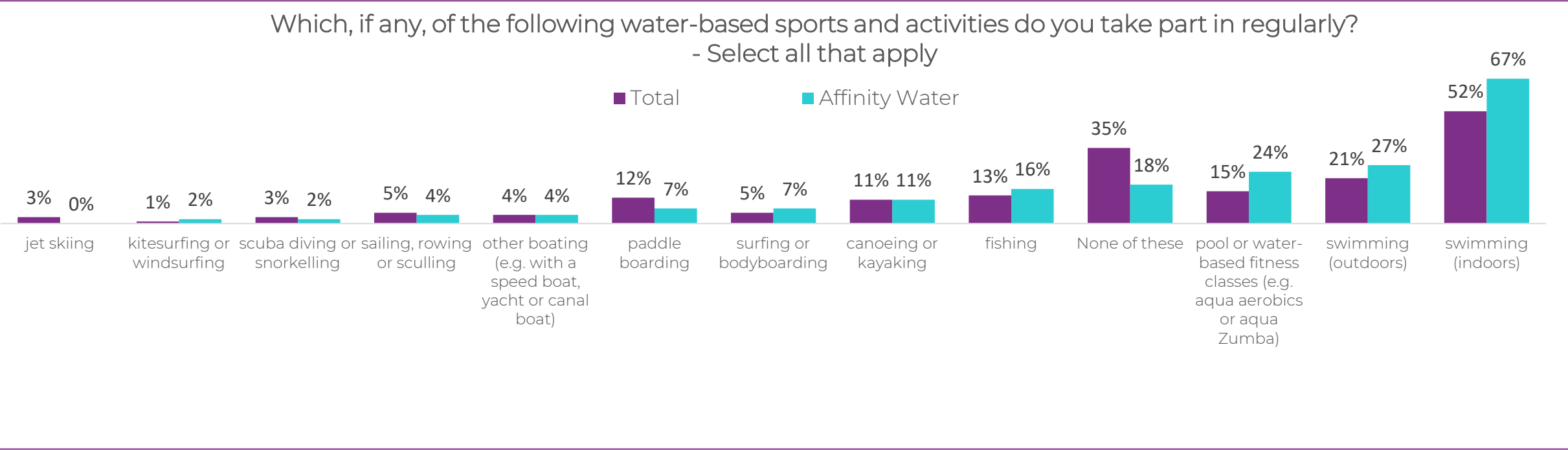
Affinity Water community members are more likely than the norm to have a dishwasher and a washing machine. They are also more likely to have an indoor power shower and water efficient tap(s) or shower head(s).

Which, if any of the following do you, or anyone who lives with you, use/have at home?
- Select all that apply



Water Locations & Activities

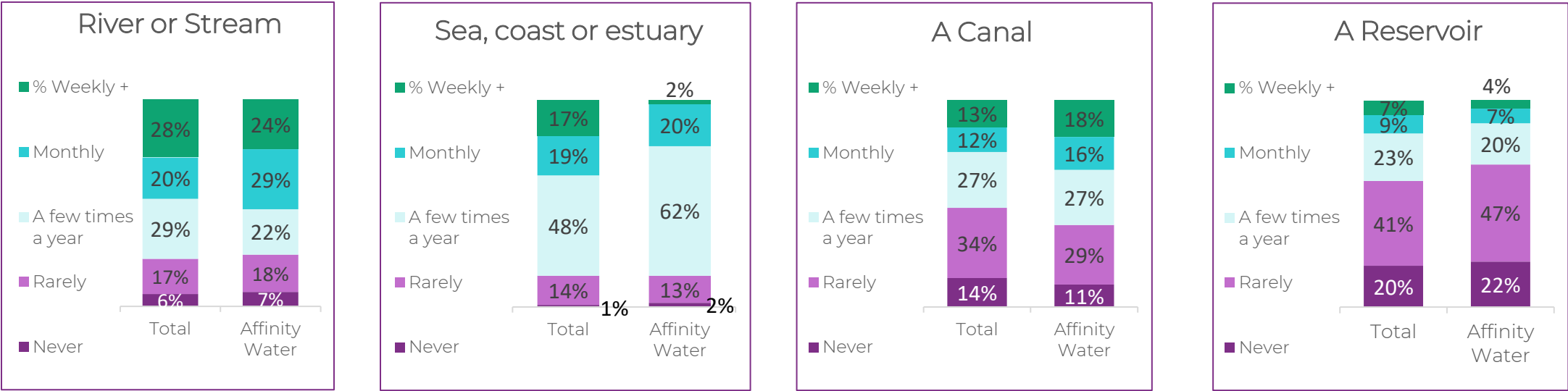
Swimming (indoors) is by far the most common water-based activity for Affinity Water community members who are also more likely to take part in swimming outdoors and pool or water-based fitness classes compared to the norm. They are less likely than the norm to not regularly practice any of the listed water-based activities.



Water Locations & Activities

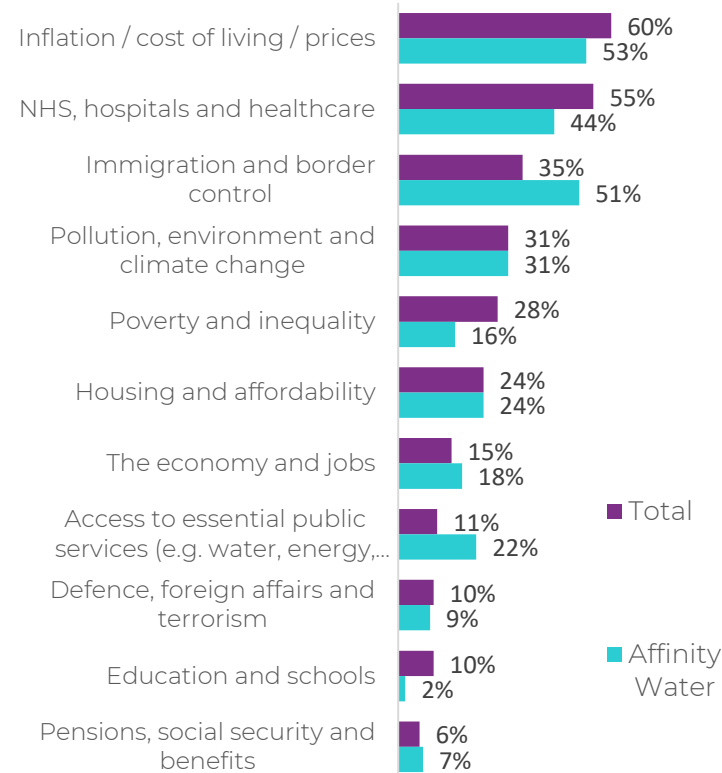
Affinity Water community members are more likely than the norm to visit the sea, coast or estuary just a few times a year. They are more likely to rarely or never visit a reservoir.

How often, if at all, do you spend time by or on the water at any of these places shown below?

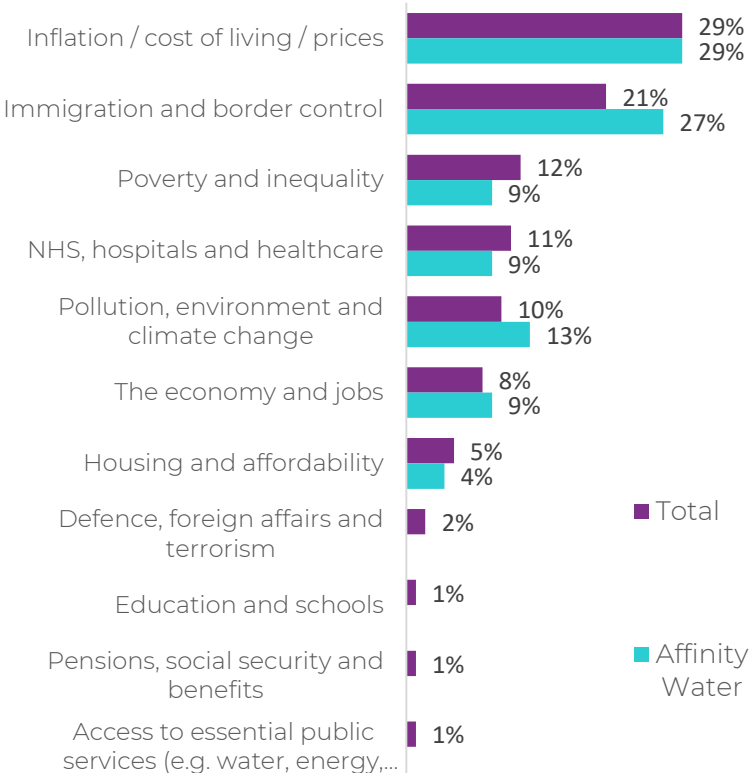


UK Issues

All Issues Facing the UK - Select up to two



ONE Main issue Facing the UK



Affinity Water community members have told us their top issue is:

- Inflation / cost of living / prices

This is in line with the norm.

Immigration and border control rank as second single biggest issue. This is slightly above the norm.

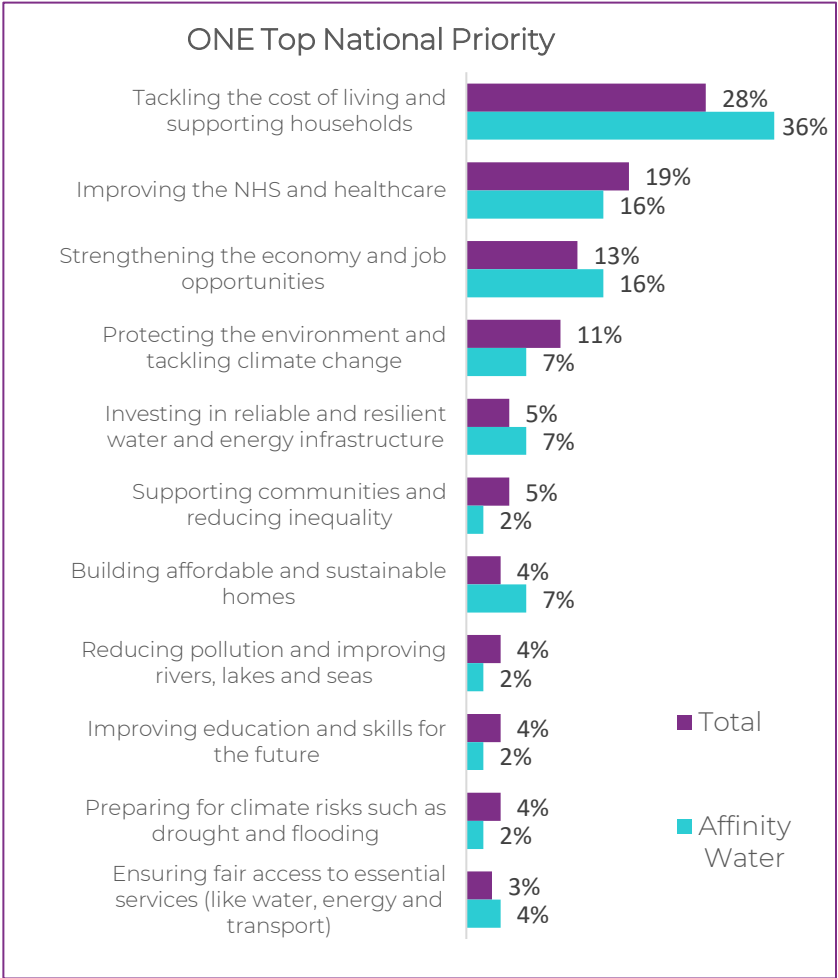
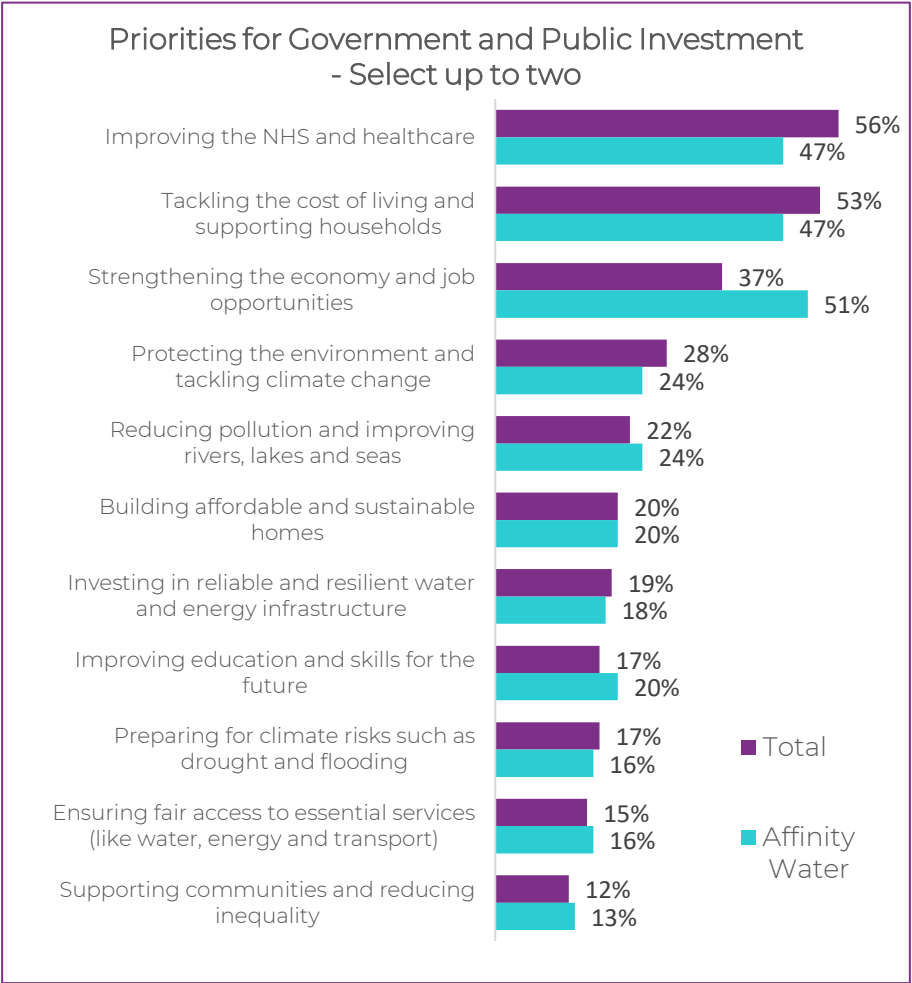
Pollution, environment and climate change ranks as their third single biggest issue, compared with fifth in the total.

UK Priorities

Affinity Water community members rank tackling the cost of living and supporting households as the top priority. This is by a higher number than the norm.

They are more likely than the norm to see strengthening the economy and job opportunities as a total priority.

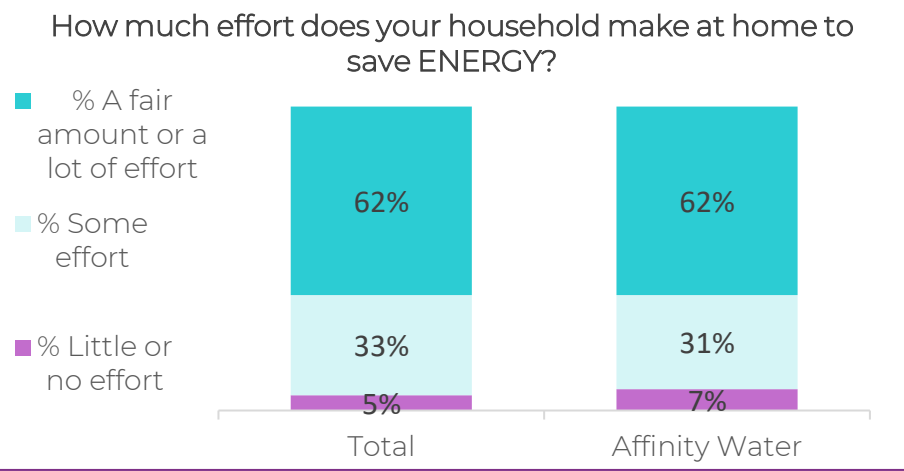
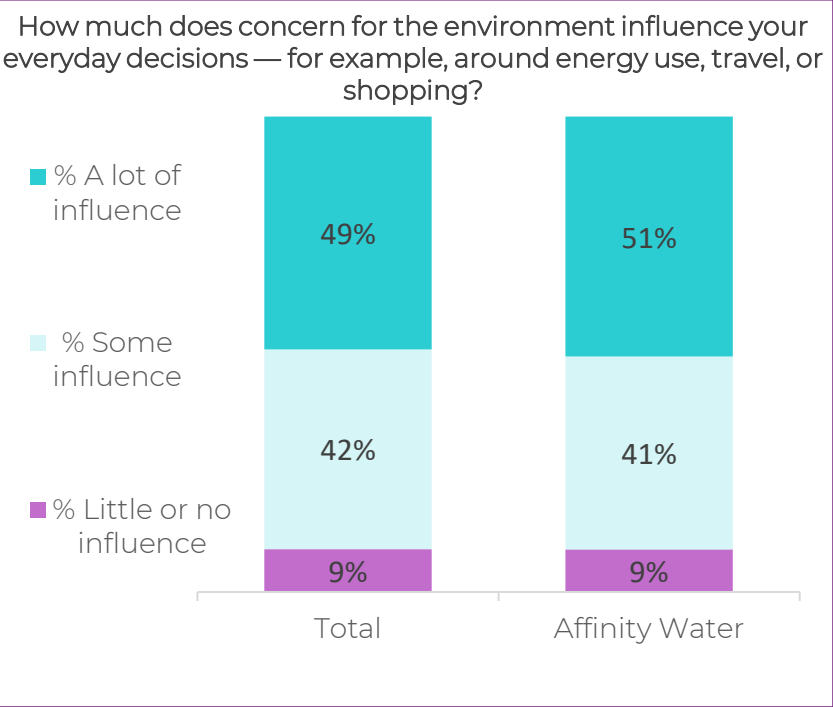
Affinity Water community members are also slightly more likely than the norm to see reducing pollution and improving rivers, lakes and seas, and improving education and skills for the future as priorities for the future.



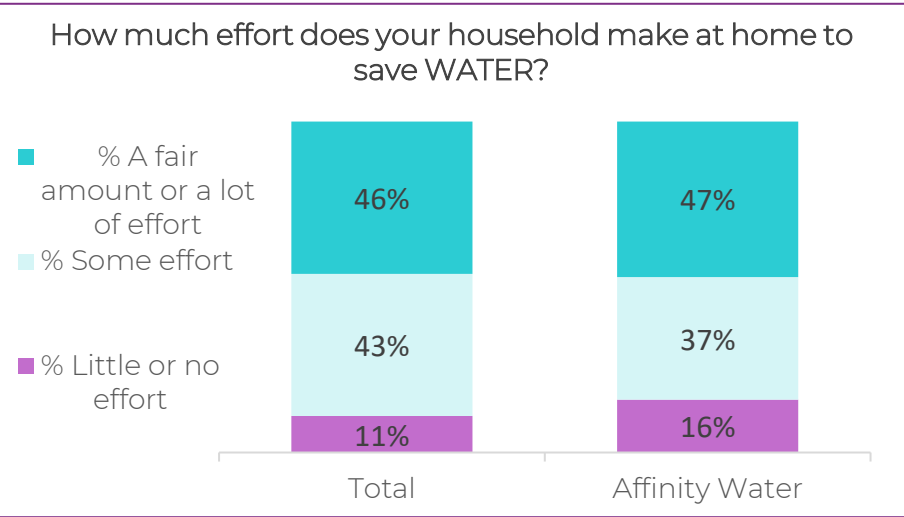
Environment Concerns

Including Saving Water & Energy

Affinity Water community members are marginally more likely than the norm to say that concern for the environment has a lot of influence on their everyday decisions.



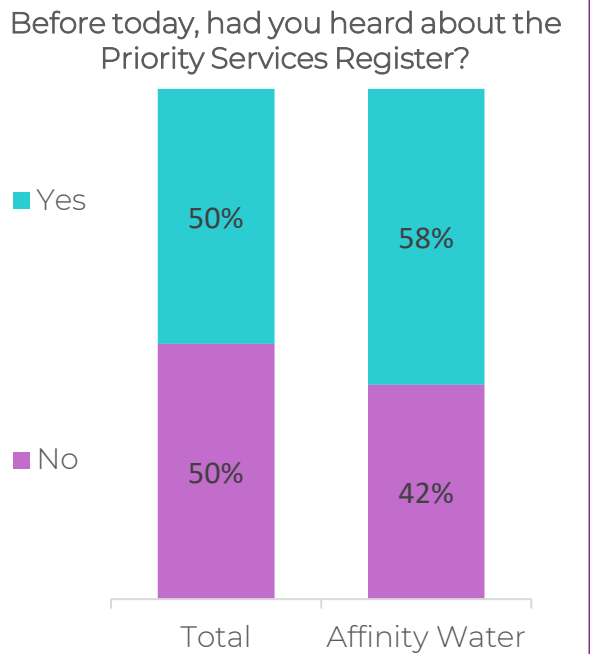
62% of Affinity Water community members (on par with the norm), say they make a fair amount or a lot of effort to save energy.



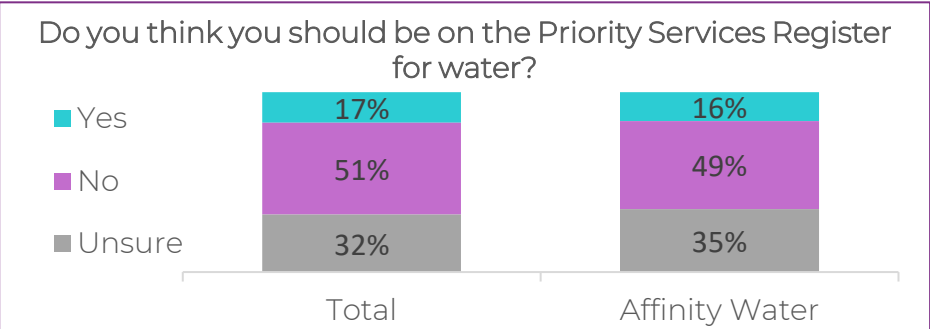
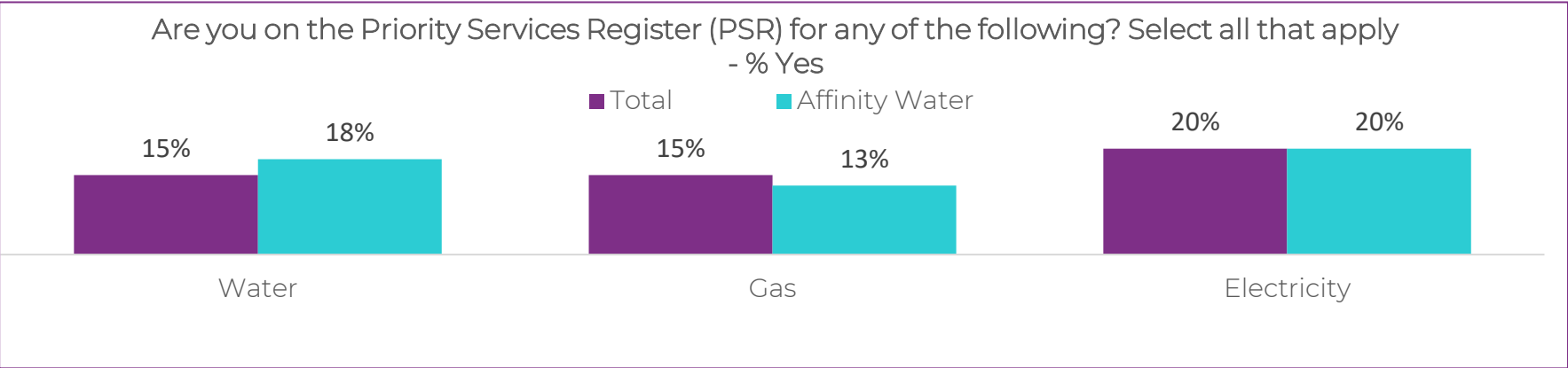
Affinity Water community members are slightly more likely to say they make little or no effort to save water than the norm.

Priority Services Register

Overall, 58% of Affinity Water community members say they have heard of the Priority Services Register.



A higher proportion of Affinity Water community members say they are on the Priority Services Register for electricity than for gas or water. They are more likely to be on the water register compared to the norm.



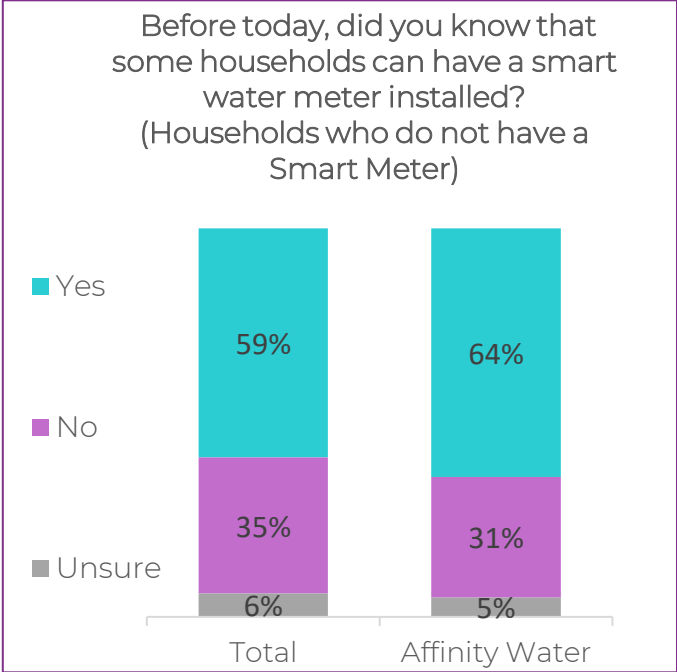
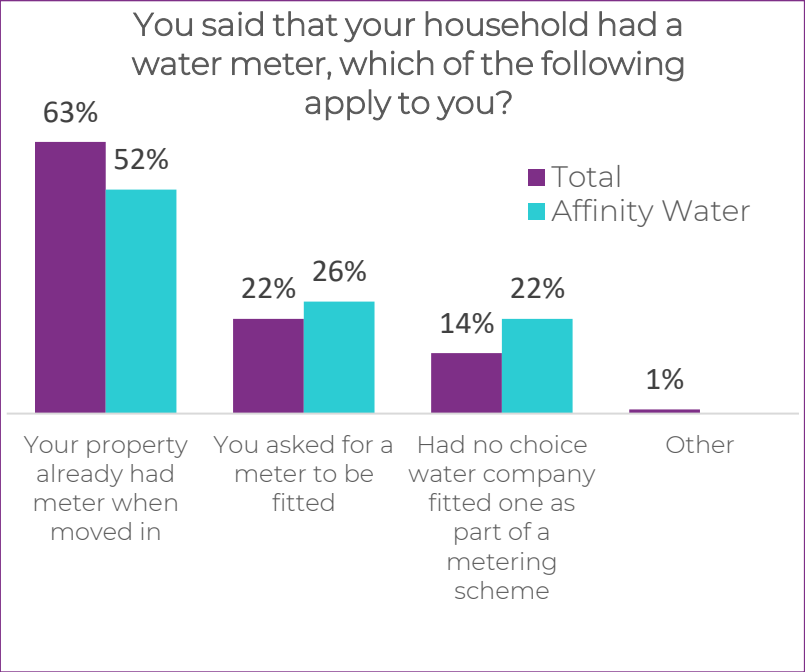
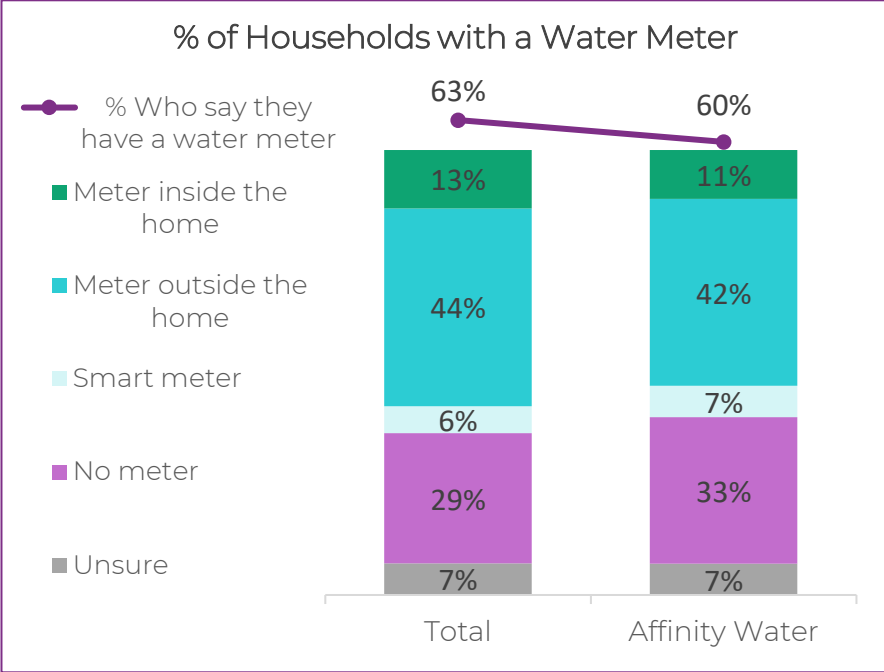
For those not currently on the Priority Services Register for water, 16% of Affinity Water community members think they should be on it.

Water Meters

Affinity Water community members are less likely than the norm to say they have a water meter. They are marginally less likely to have a meter inside and outside the home compared to the norm, and marginally more likely to have a smart meter.

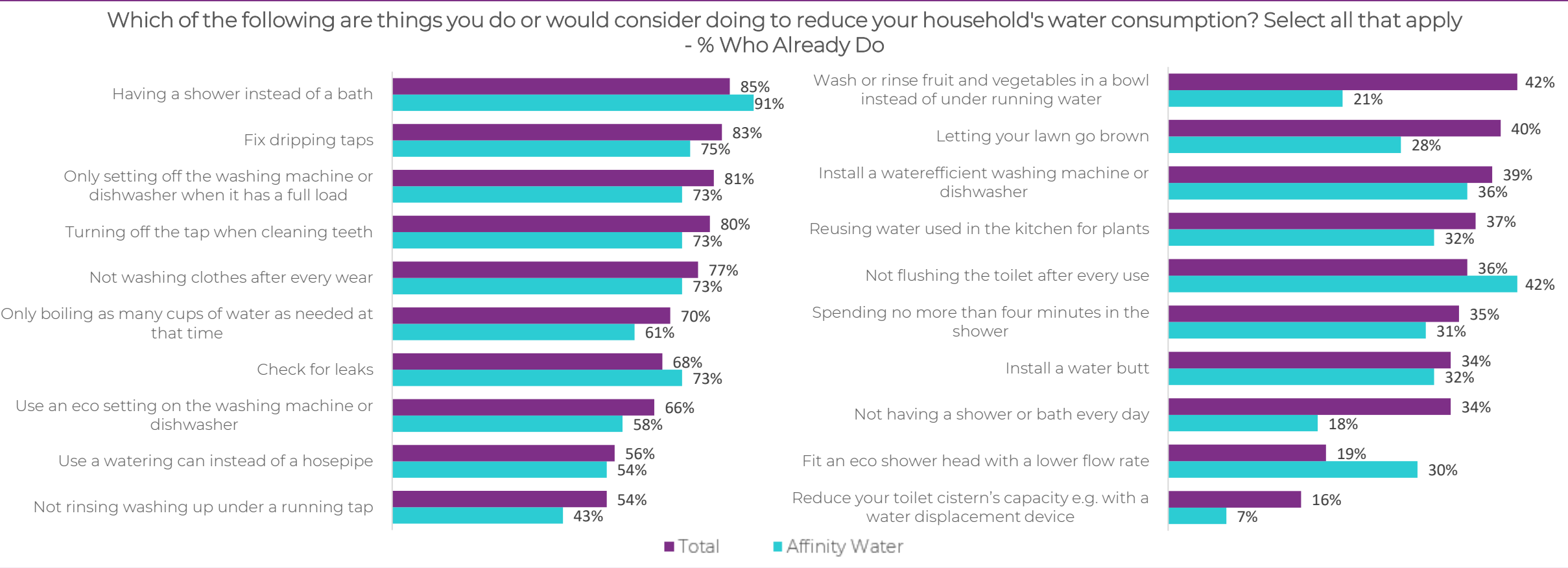
Among Affinity Water community members who have a water meter, 52% already had in the property when they moved in (below the norm). 26% asked for it to be fitted and 22% had no choice (both above the norm).

64% of Affinity Water community members know that households can have a smart water meter installed. This is slightly above the norm.



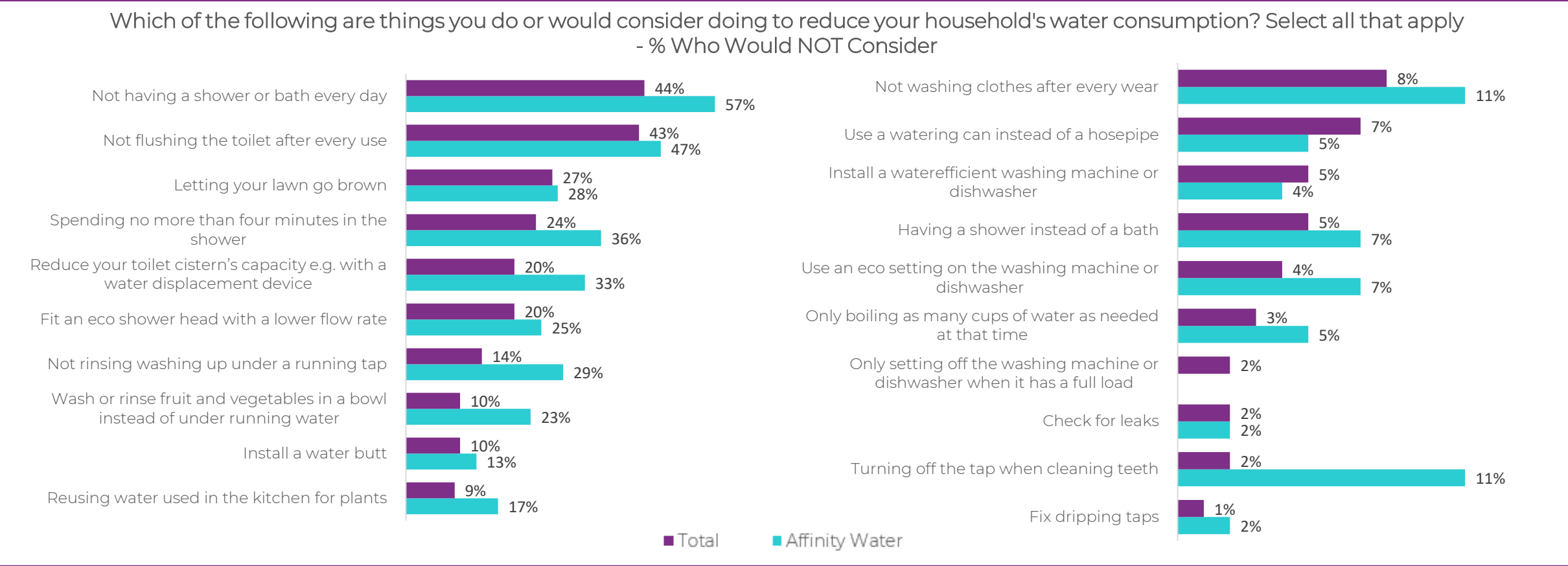
Water-Saving Measures

The majority of Affinity Water community members (and a higher number compared to the norm) say they are already having showers instead of baths and checking for leaks. They are less likely than the norm to fixing dripping taps, only setting off the washing machine or dishwasher when it has a full load, and turning off the tap when cleaning teeth.



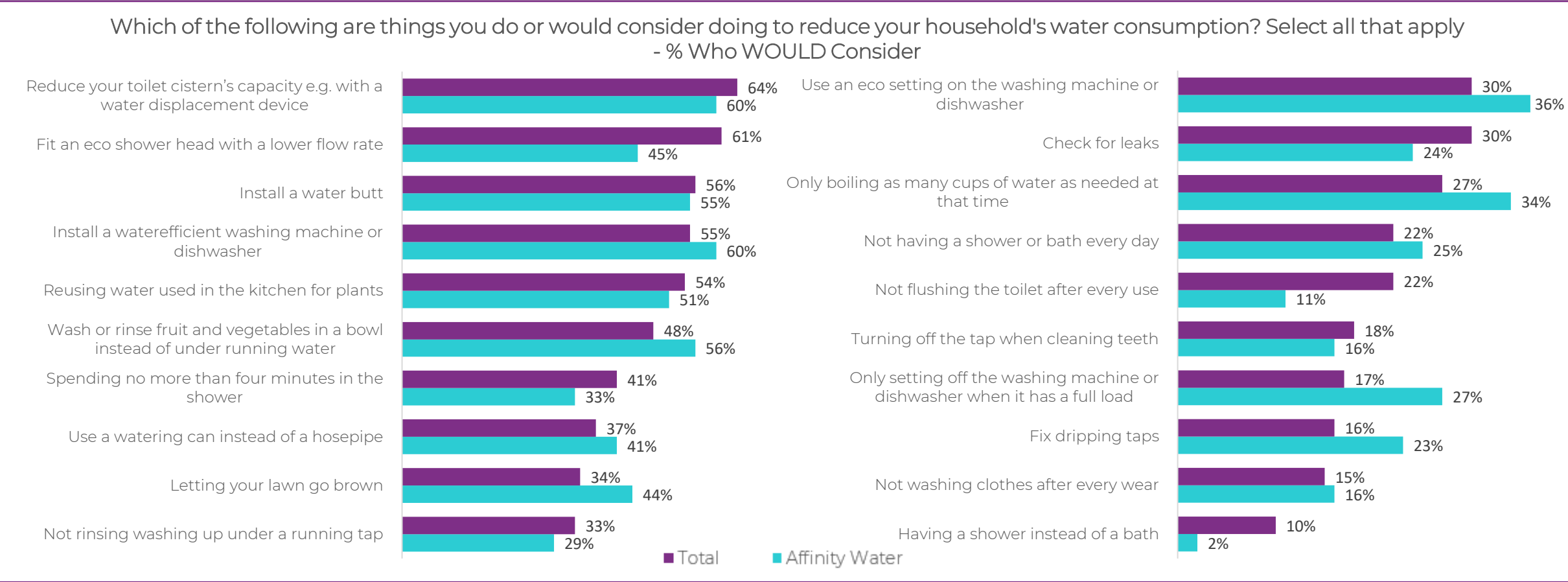
Water-Saving Measures

For Affinity Water community members, the water-saving measures generating the greatest resistance are not having a shower or bath every day, not flushing the toilet after every use, and spending no more than four minutes in the shower.



Water-Saving Measures

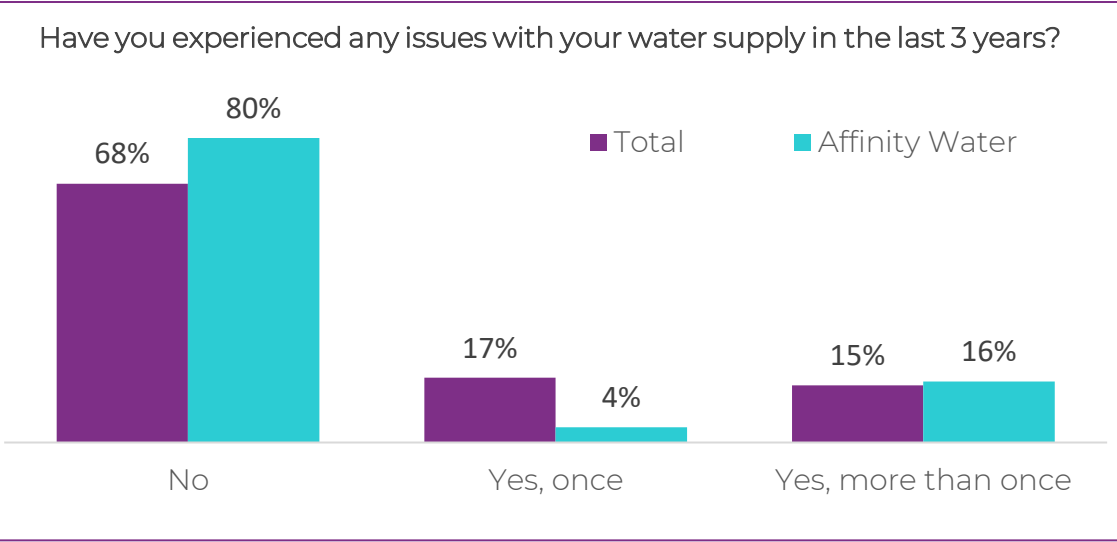
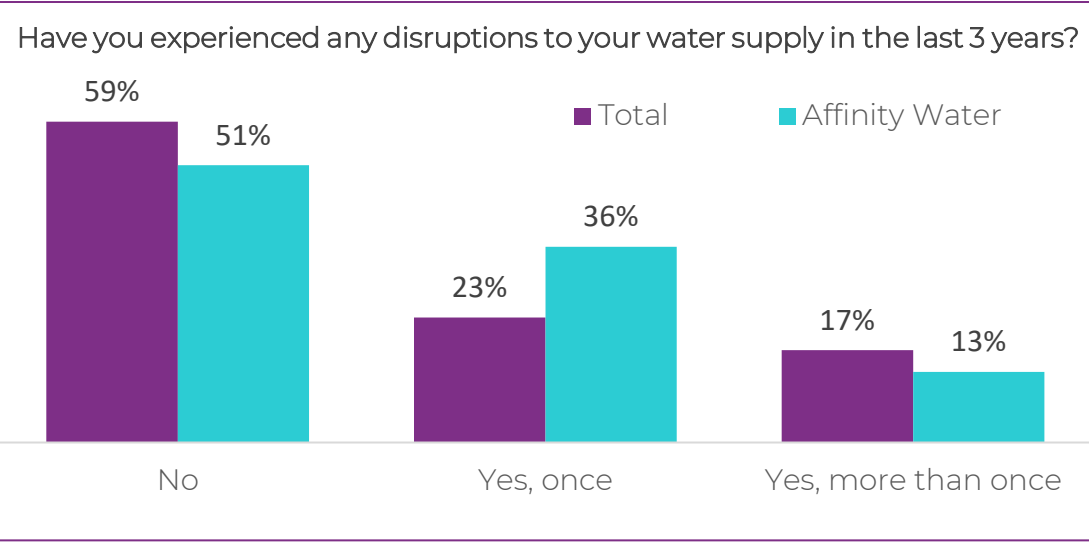
For Affinity Water community members, the highest levels of openness are to reducing the toilet cistern’s capacity, installing a water-efficient washing machine or dishwasher, and washing or rinsing fruit and vegetables in a bowl.



Disruptions & Issues

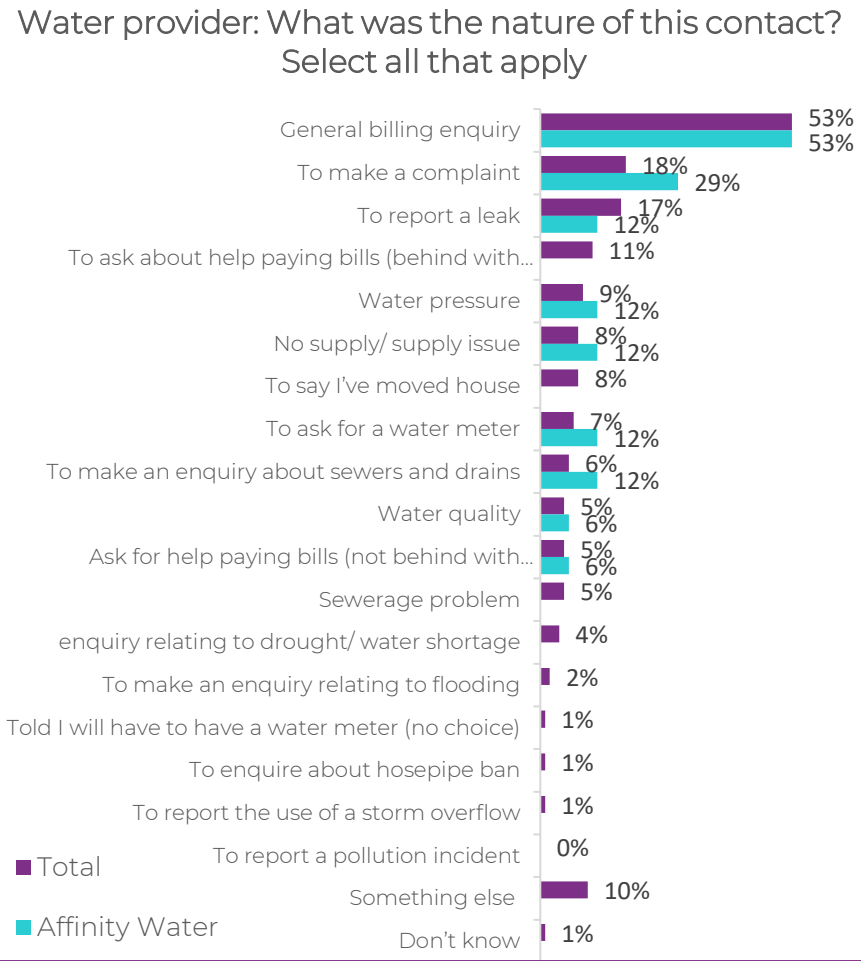
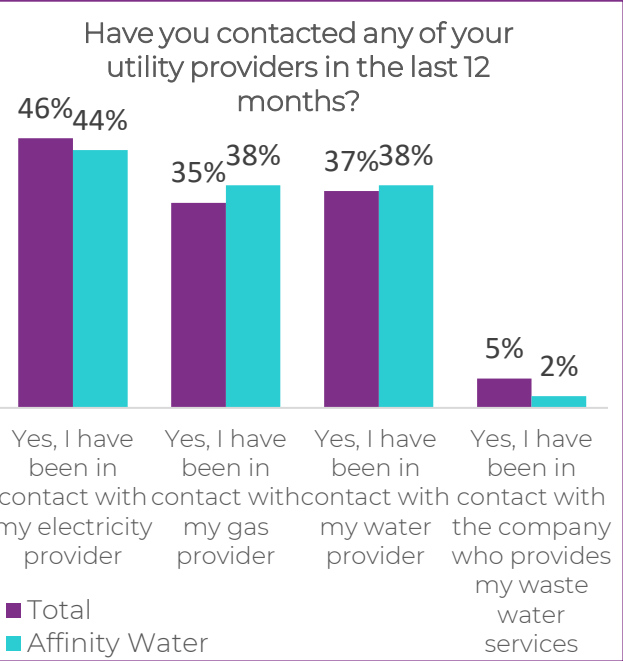
51% of Affinity Water community members say they have not experienced supply disruptions in the last 3 years (slightly lower than the norm). 36% have had one disruption (higher than the norm) and 13% have had a disruption more than once (slightly below the norm).

80% of Affinity Water community members say they have had no issues with water quality in the last 3 years (above the norm). 4% have had one issue (below the norm) and 16% more than one issue.

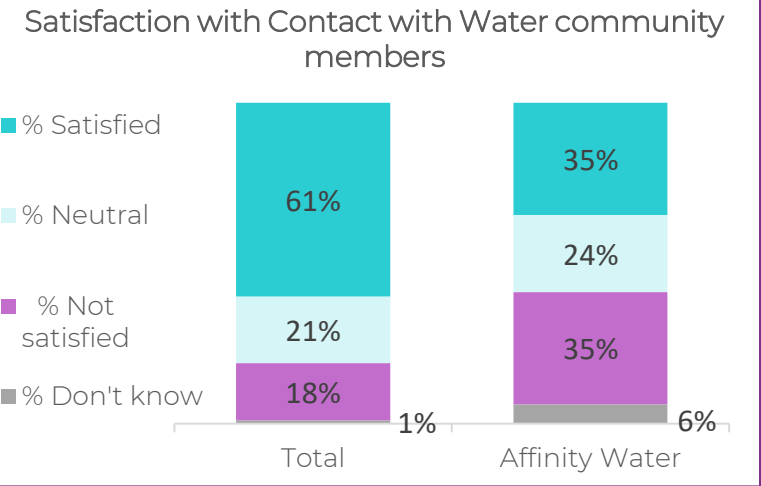


Contact with utility providers

38% of community members have been in contact with Affinity Water in the last 12 months (on par with the norm).



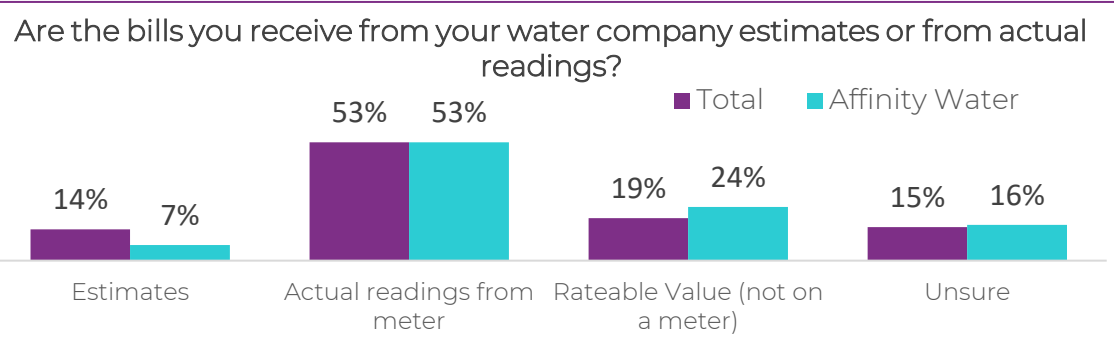
Billing enquiries are the main reason for contacting Affinity Water. Making a complaint was selected by 29% of Affinity Water community members who made contact, a higher number compared to the norm at 18%. 35% of Affinity Water community members who made contact were satisfied with that contact. This is lower than the norm.



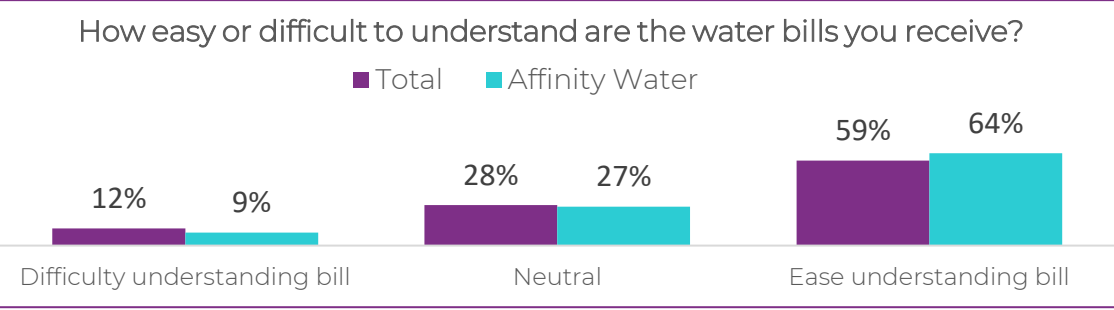
N.B. References to wastewater are not related to Affinity Water as they are not the wastewater provider for this community.

Billing

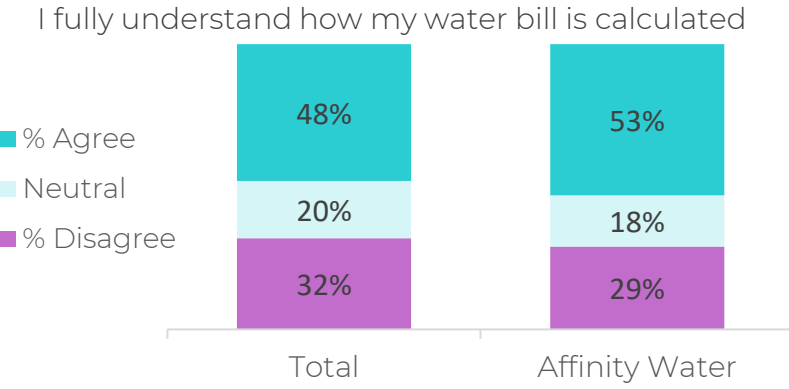
Affinity Water community members are more likely than the norm to have their water bills based on rateable value and less likely to have estimates as their base.



64% of Affinity Water community members say that they find it easy to understand their water bills, slightly above the norm.

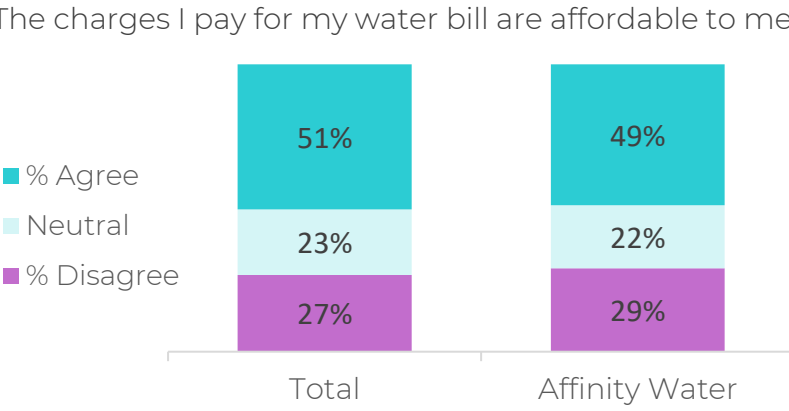


How much do you agree or disagree with the following statements?



53% of Affinity Water community members feel they understand how their water bill is calculated, slightly above the norm.

How much do you agree or disagree with the following statements?



Affinity Water community members are slightly more likely than the norm to disagree that their water bills are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

Portsmouth Water
November 2025

Delivered by Taylor McKenzie
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Version: Final copy 15.12.25

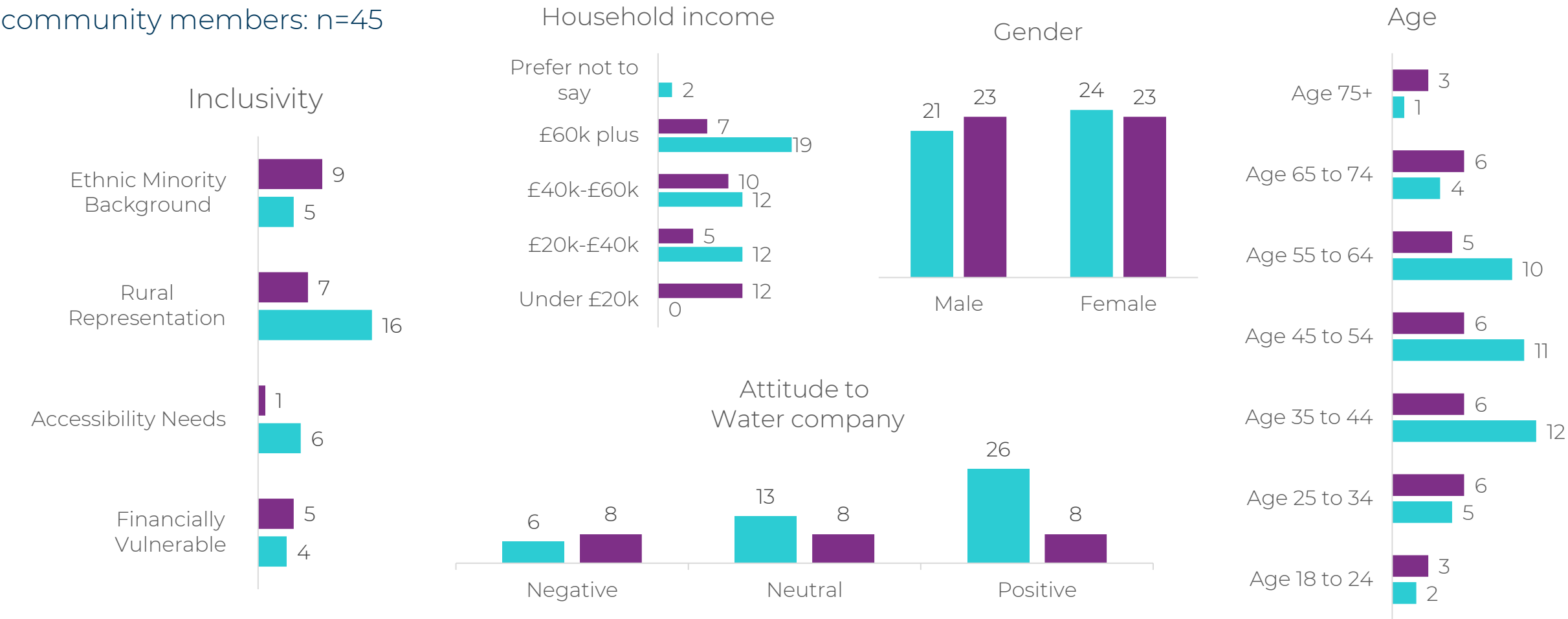
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Portsmouth Water

Community population



Portsmouth Water
community members: n=45



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 community members 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 male, ethnic minority background and 18-24 & 75+ sample by at least 2 for next month.

Current Quota Minimum Quota

Portsmouth Water

What do Portsmouth Water community members hope this community achieves?



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Having a voice and influencing change:** water companies to take consumer opinions seriously and provide a true voice for community members.
- **Improve services, water quality and the environment:** both service delivery and environmental protection are important. They want cleaner water, reduced pollution and sewage spills, and to address long-term infrastructure challenges.
- **Awareness, transparency and understanding:** learn more and have a better insight into how water services work. Clarity on future plans and climate challenges.
- **Community collaboration:** the opportunity to talk to others in their area and engage with their water board; building a stronger company-customer relationship.

“What Portsmouth Water community members have said...”

“I hope that I can swim in the sea I can walk to from my house and not have to worry about the pollution or not have to worry that drinking from the tap means putting lots of bad things into my body.” Female, 28, Lives with adult family members

“I hope the Water Voice panel helps raise awareness, inspires action, and influences real changes in how communities value and manage water for a more sustainable future.” Male, 47, Lives with partner and child/children

“I would like more insight into how things work with the water companies. I'm looking forward to finding out what others think as well.” Female, 60, Lives with partner and child/children”

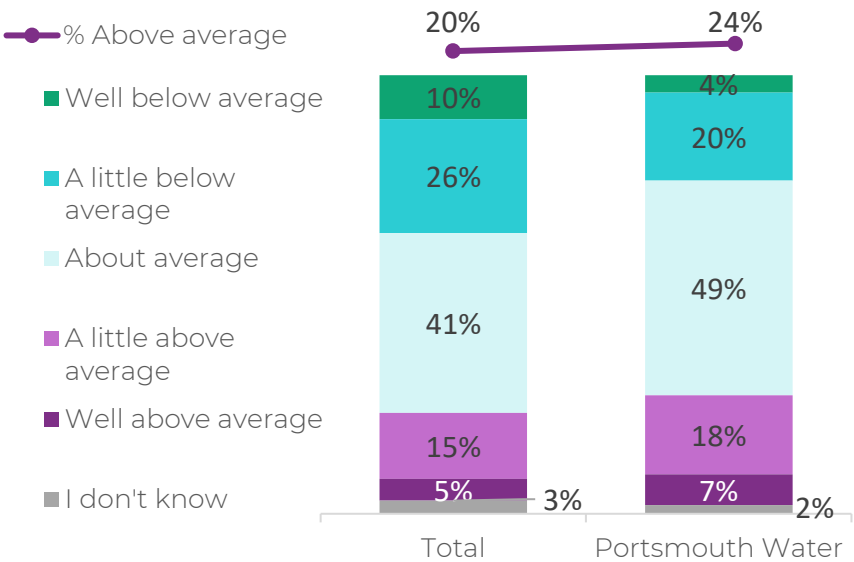
Portsmouth Water community members want to strengthen their relationship with water companies. They want Portsmouth Water to genuinely listen, action meaningful changes and improve transparency. They hope it will drive better water quality, reduced pollution, sustainable practices, and a customer-driven approach that values shared learning and long-term improvements.

Active community members
Total Base Size: 755
Portsmouth Water Base Size: 45

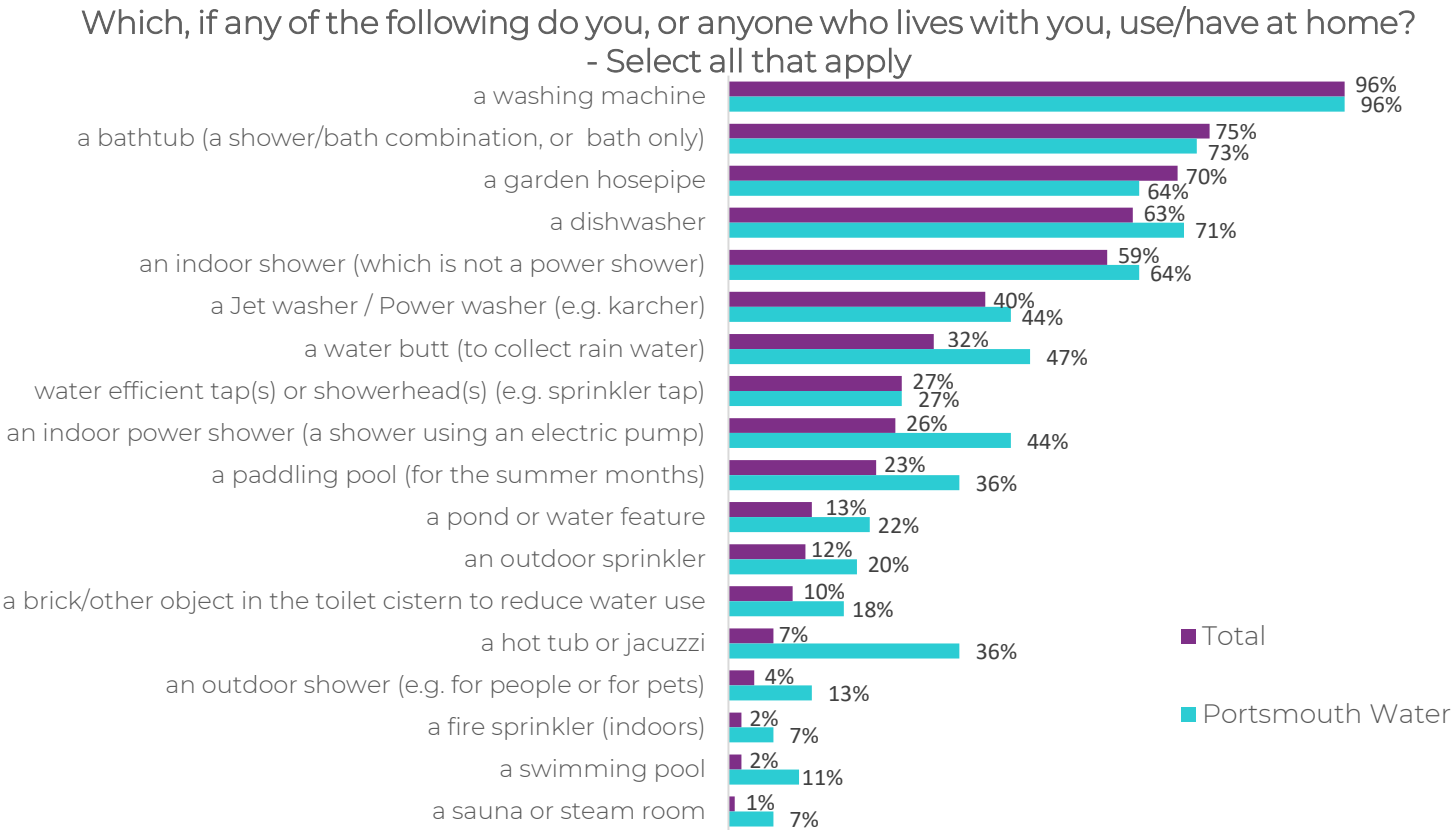
Water Use at Home

Portsmouth Water community members are slightly more likely to report their water consumption as “above average”. Compared to the norm, they are more likely to report their water consumption as “about average” and less likely as “ below average”.

In a typical week, how much water would you say your household uses vs a similar household?



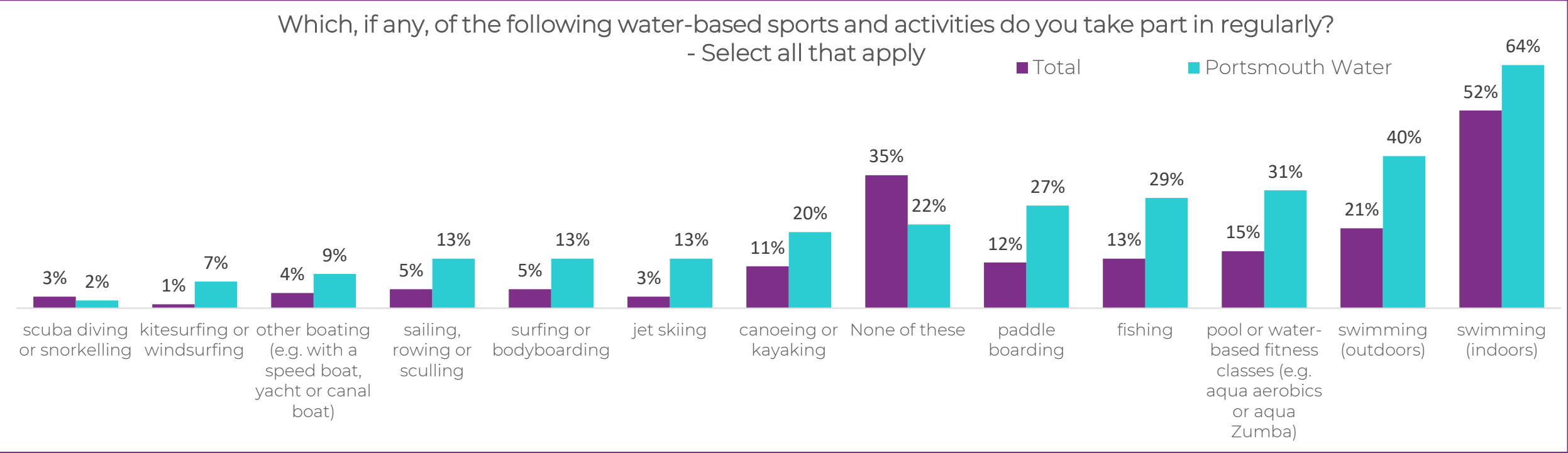
Portsmouth Water community members are far more likely than the norm to have a hot tub or jacuzzi. They are also more likely to have a water butt, an indoor power shower and a paddling pool.



Water Locations & Activities

Swimming (indoors) is by far the most common water-based activity for Portsmouth Water community members, who are also more likely to take part in swimming (outdoors) and pool or water-based fitness classes compared to the norm. They are also less likely than the norm to say they do not take part in any water-based sports/activities.

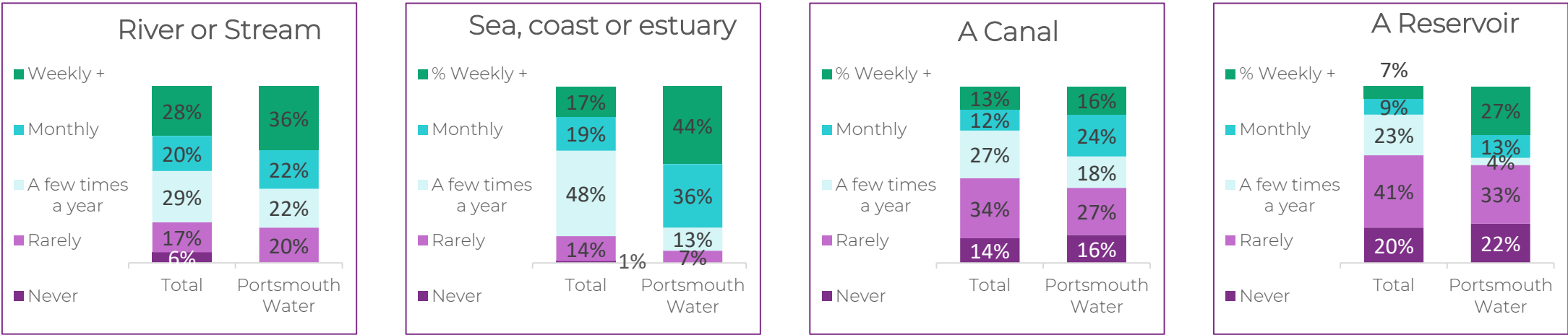
Which, if any, of the following water-based sports and activities do you take part in regularly?
- Select all that apply



Water Locations & Activities

Portsmouth Water community members are more likely than the norm to visit a rivers, stream, the sea, coast or estuary, or a reservoir weekly and they are more likely to visit a canal monthly.

How often, if at all, do you spend time by or on the water at any of these places shown below?

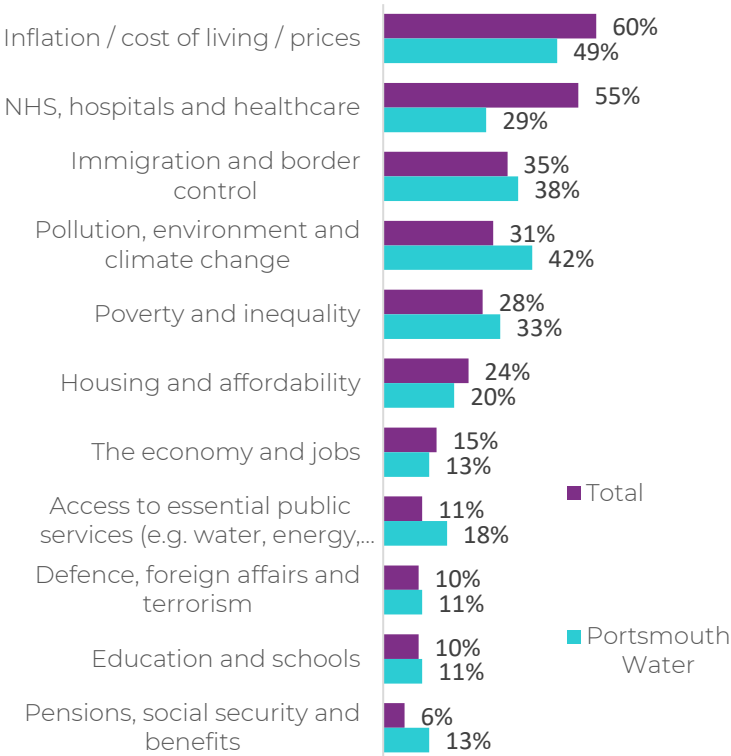


UK Issues

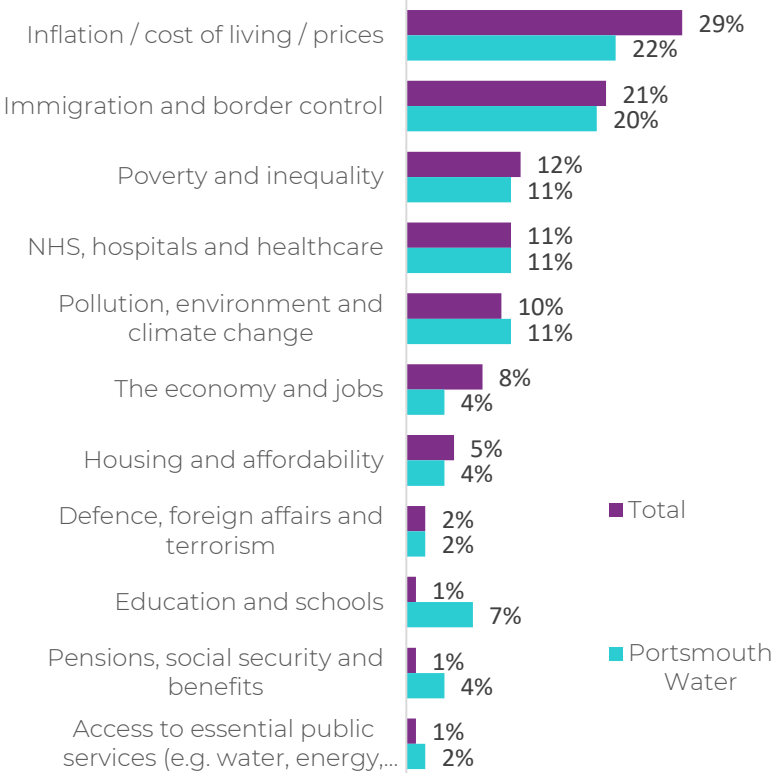


The voice for water consumers
Llais defnyddwyr dŵr

All Issues Facing the UK – Select top two



ONE Main issue Facing the UK



Portsmouth Water community members have told us their top issue is:

- Inflation / cost of living / prices

This is slightly below the norm.

Immigration and border control rank as second single biggest issue and poverty and inequality, NHS, hospitals and healthcare, and pollution, environment and climate change rank as joint third single biggest issues.

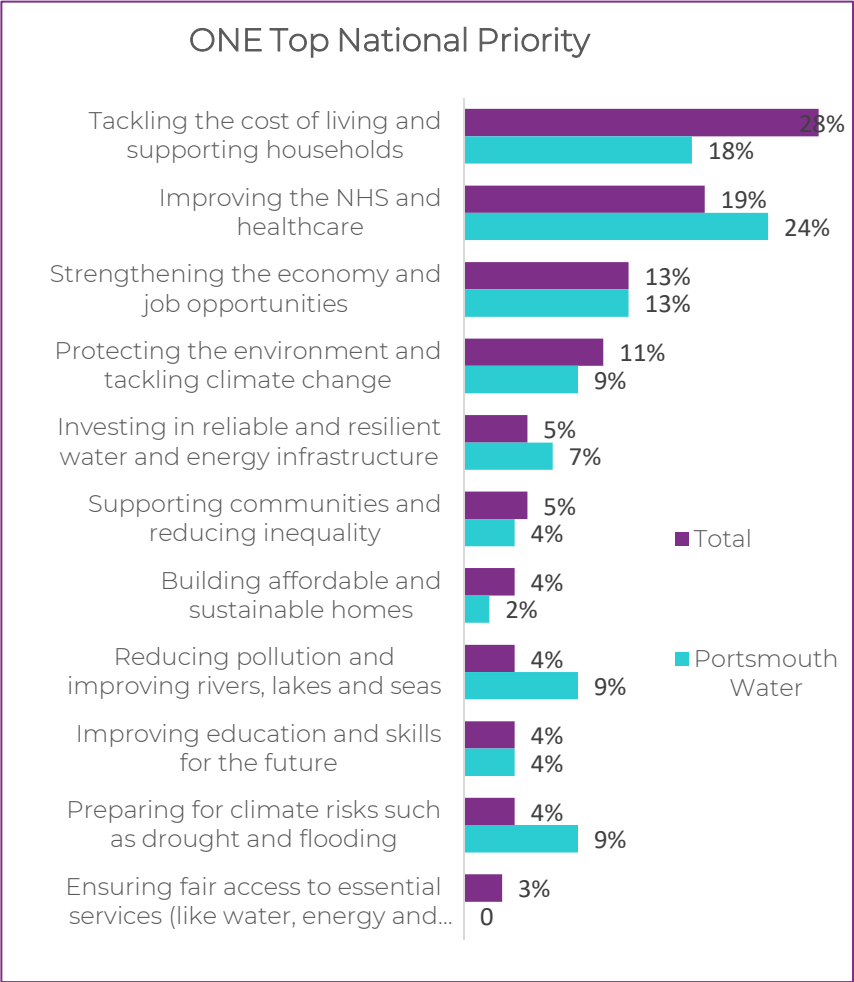
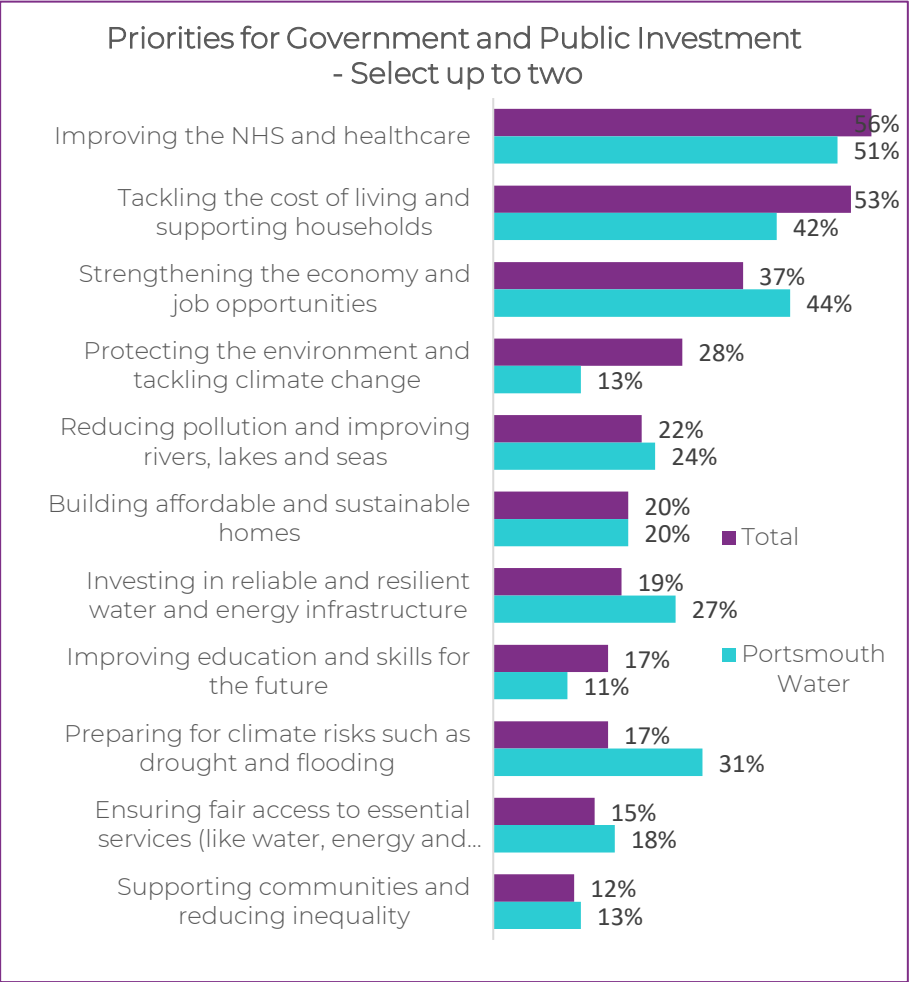
UK Priorities



The voice for water consumers
Llais defnyddwyr dŵr

Portsmouth Water community members rank improving the NHS and healthcare as their top priority, this is by a slightly higher number than the norm. Tackling the cost of living and supporting households ranks as the second top priority (below the norm).

Portsmouth Water community members are more likely than the norm to see preparing for climate risks and investing in water and energy infrastructure as total priorities.

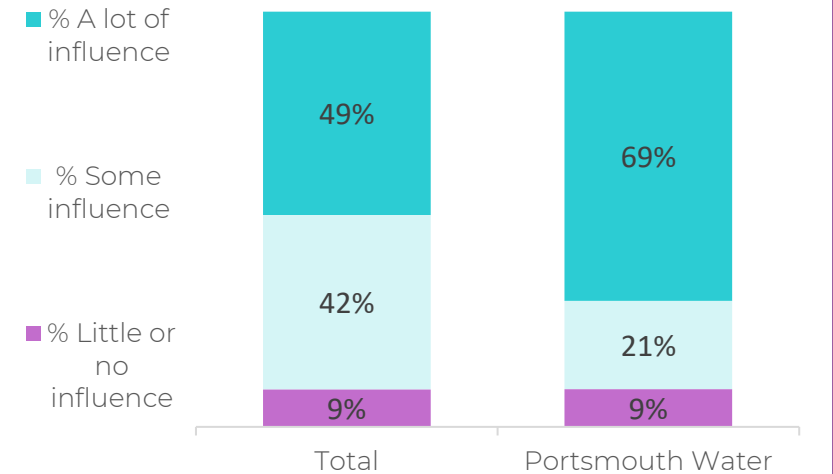


Environment Concerns

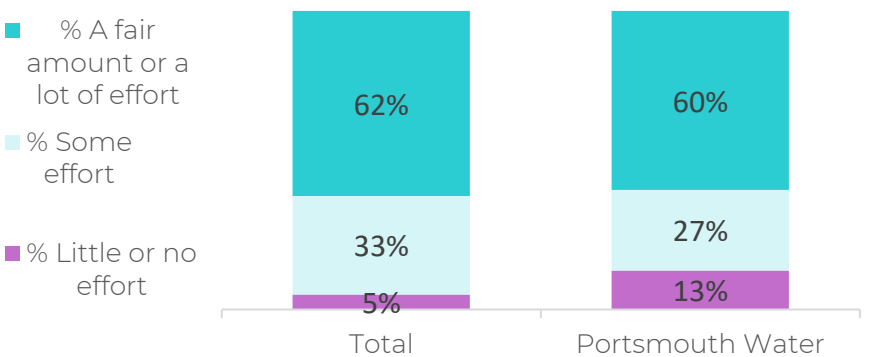
Including Saving Water & Energy

Portsmouth Water community members are more likely than the norm to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

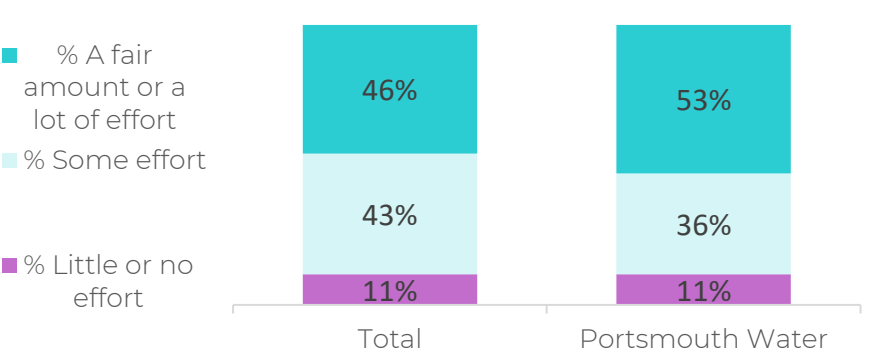


How much effort does your household make at home to save ENERGY?



60% of Portsmouth Water community members say they make a fair amount or a lot of effort to save energy, marginally lower than the norm.

How much effort does your household make at home to save WATER?

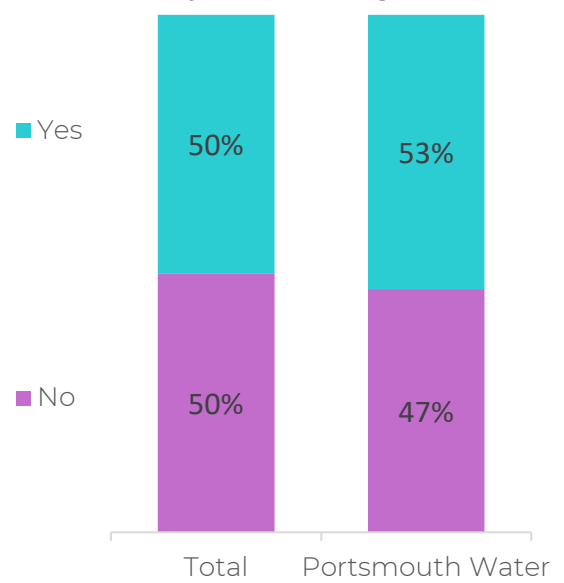


Portsmouth Water community members are more likely to say they make a fair amount or a lot of effort to save energy than to save water than the norm.

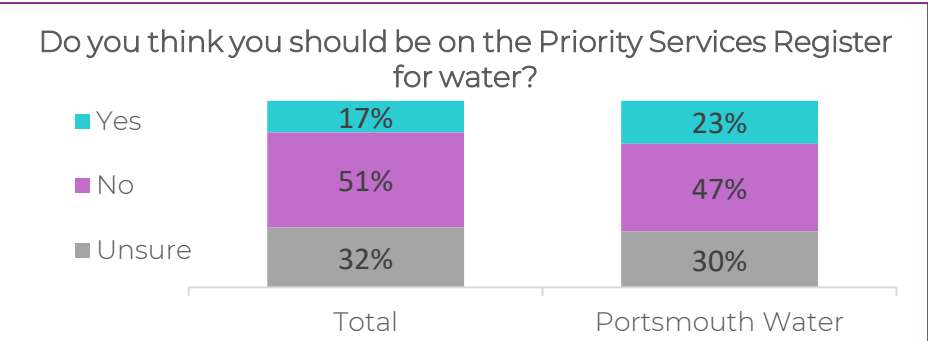
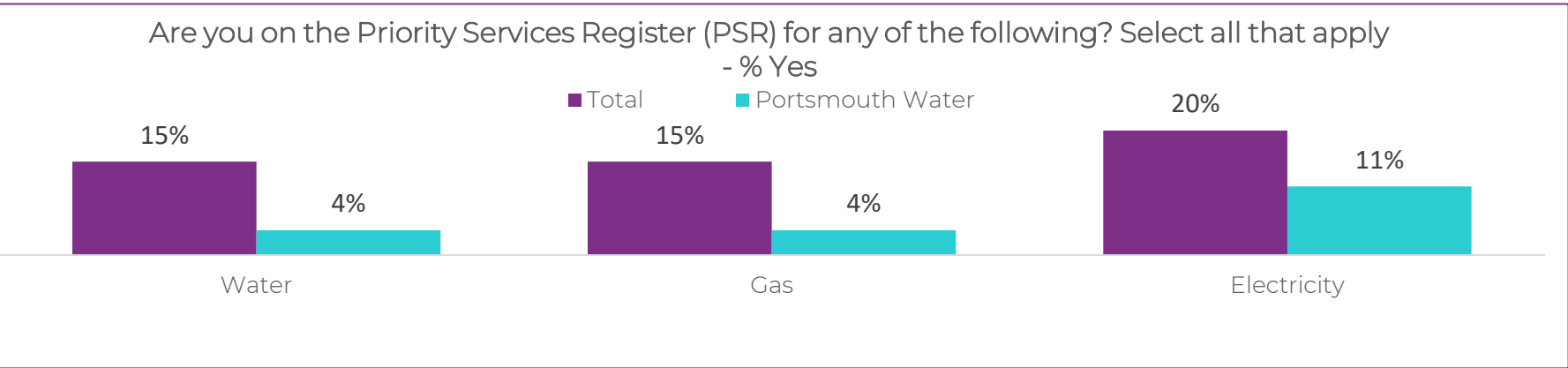
Priority Services Register

Overall, 53% of Portsmouth Water community members say they have heard of the Priority Services Register.

Before today, had you heard about the Priority Services Register?



A higher proportion of Portsmouth Water community members say they are on the Priority Services Register for electricity than for gas or water. They are less likely to be on the registers compared to the norm.



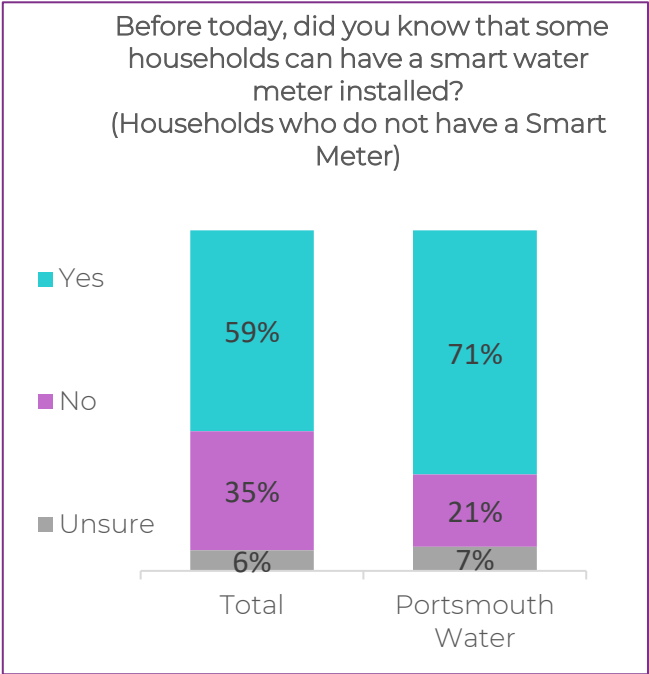
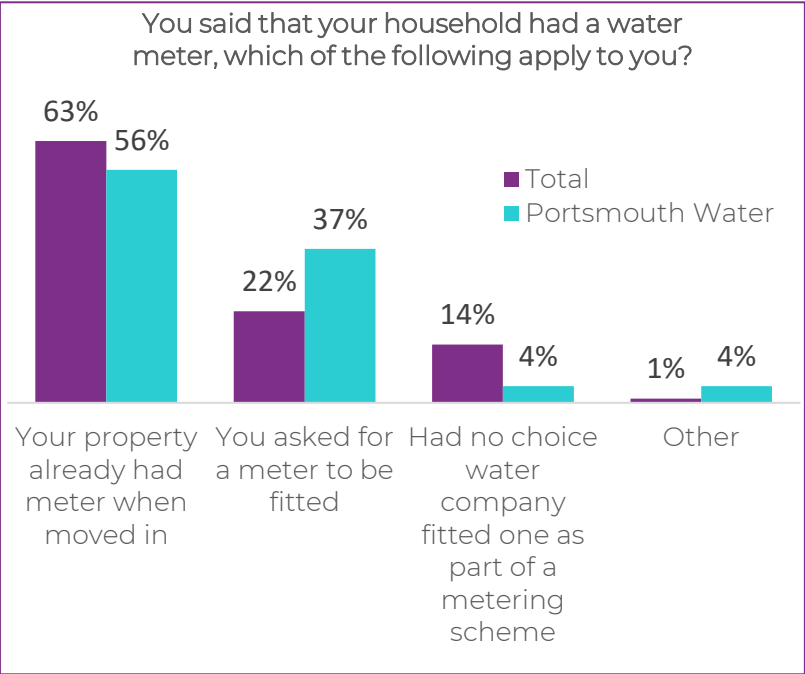
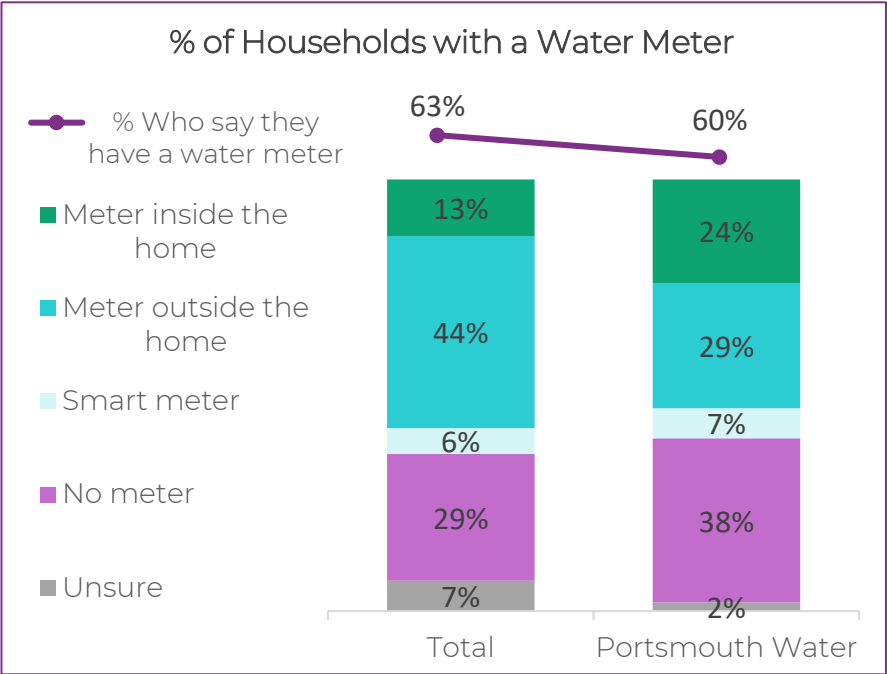
For those not currently on the Priority Services Register for water, 23% of Portsmouth Water community members think they should be on it.

Water Meters

Portsmouth Water community members are slightly less than the norm to have a water meter. Compared to the norm, they are more likely to have a meter inside the home but less likely to have one outside the home.

Among Portsmouth Water community members who have a water meter, 56% already had it in the property when they moved in (below the norm). 37% asked for it to be fitted (above the norm).

71% of Portsmouth Water community members say they know that households can have a smart water meter installed. This is above the norm.

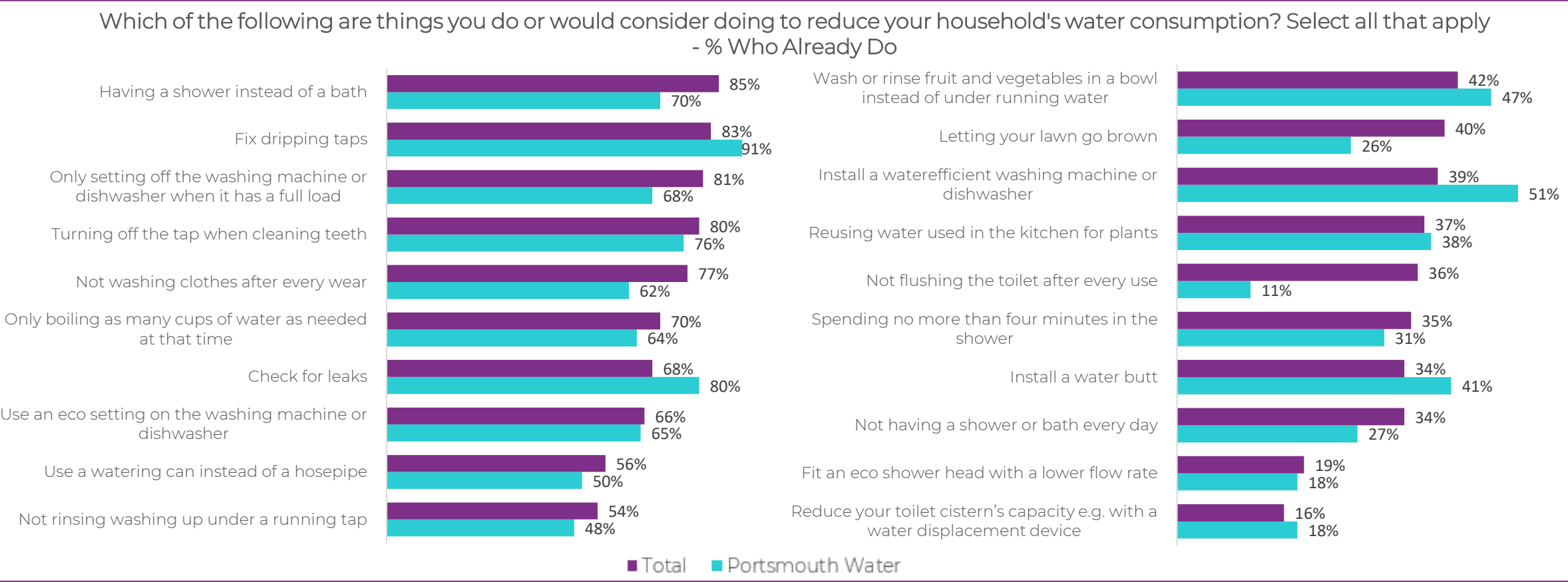


Water-Saving Measures



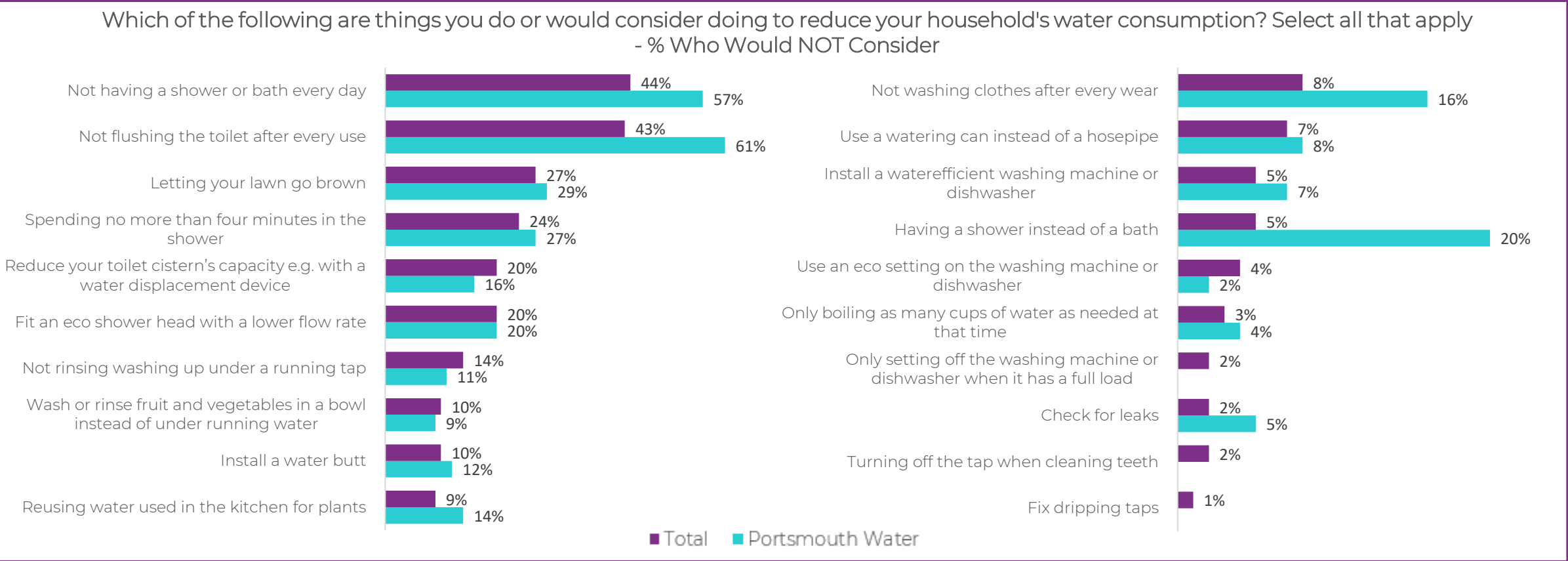
The voice for water consumers
Llais defnyddwyr dŵr

The majority of Portsmouth Water community members (and a higher number compared to the norm) say they are already fixing dripping taps, checking for leaks, and installing water-efficient washing machine or dishwasher. They are less likely than the norm to say they are having showers instead of baths and turning off the tap when cleaning teeth.



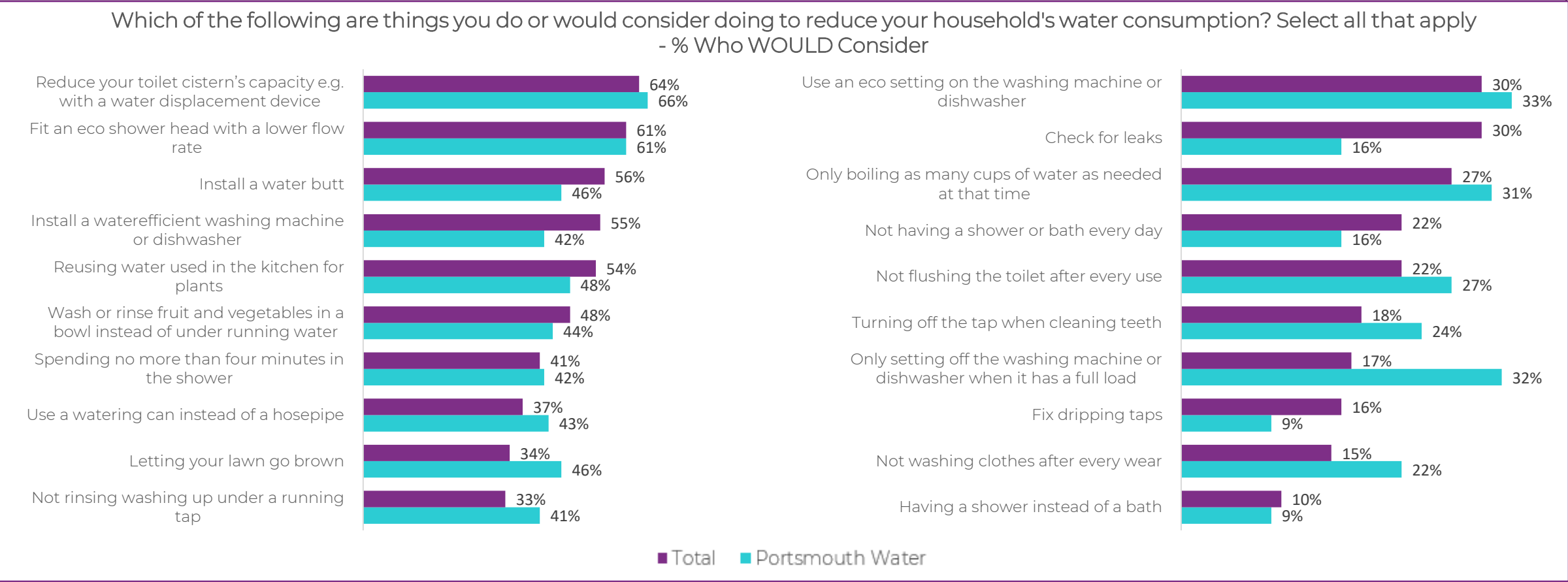
Water-Saving Measures

For Portsmouth Water community members, the water-saving measures generating the greatest resistance are not flushing the toilet after every use and not having a shower or bath every day. This is a higher level of resistance than the norm.



Water-Saving Measures

For Portsmouth Water community members, the highest levels of openness are to reducing the toilet cistern’s capacity, fitting an eco shower, and reusing water used in the kitchen for plants.

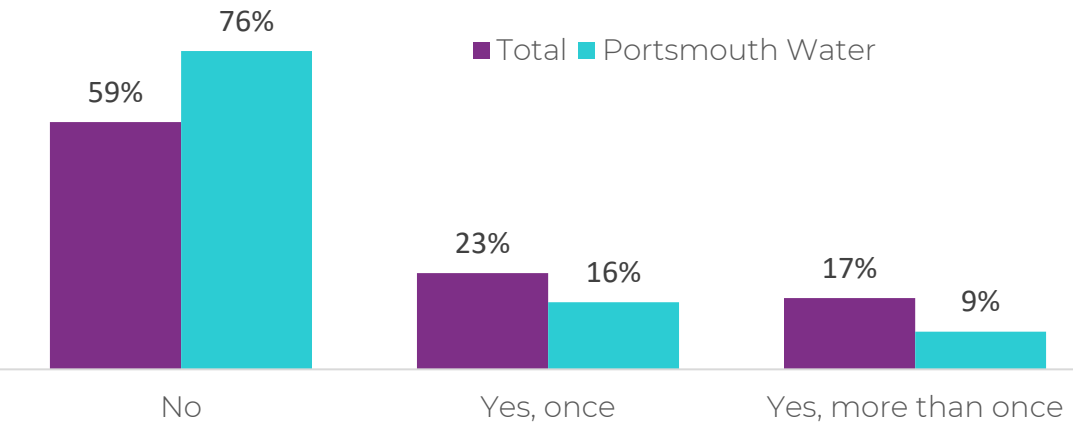


Disruptions & Issues

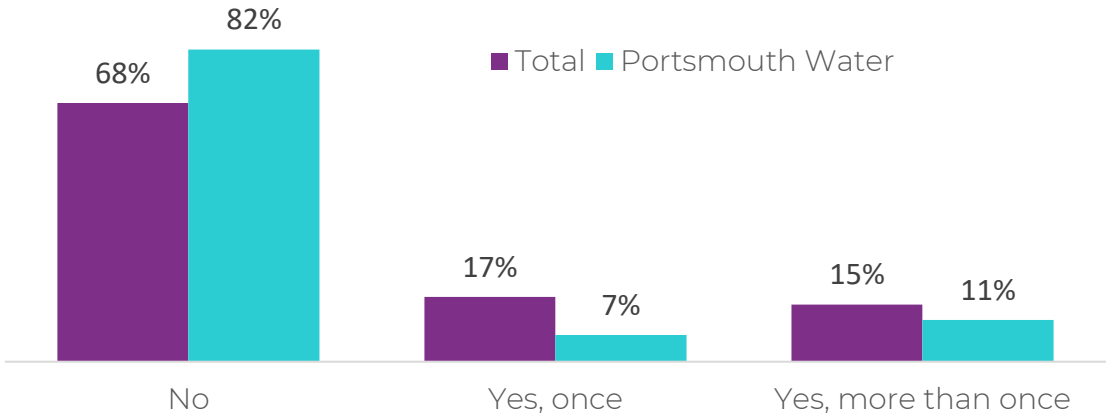
76% of Portsmouth Water community members say they have not experienced supply disruptions in the last 3 years (higher than the norm). 16% have had one disruption and 9% have had a disruption more than once (slightly below the norm).

82% of Portsmouth Water community members say they have had no issues with water quality in the last 3 years, above the norm. 7% have had one issue and 11% more than one issue (below the norm).

Have you experienced any disruptions to your water supply in the last 3 years?

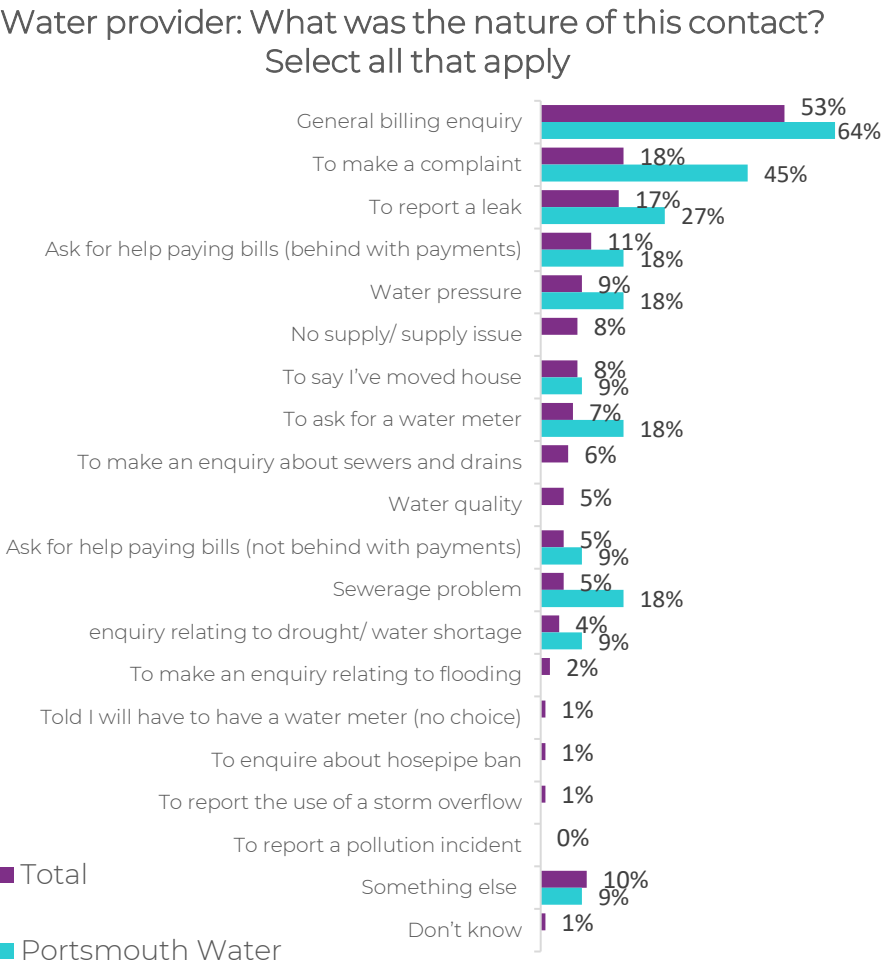
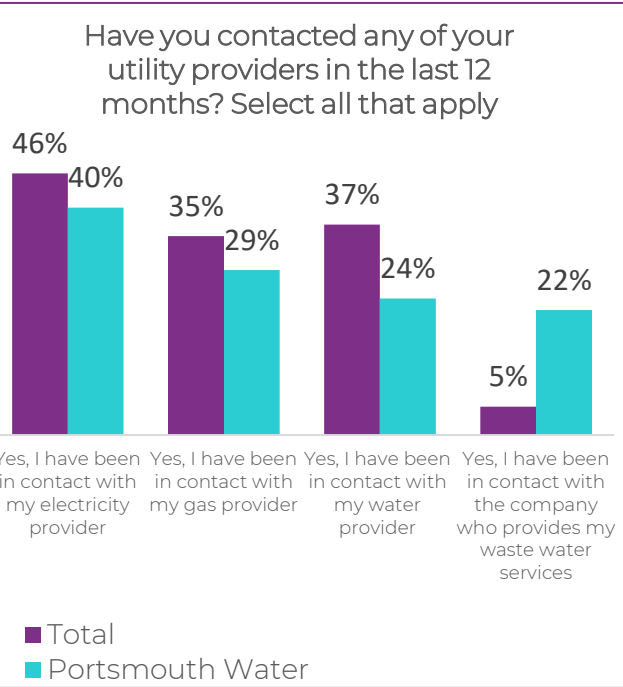


Have you experienced any issues with your water supply in the last 3 years?

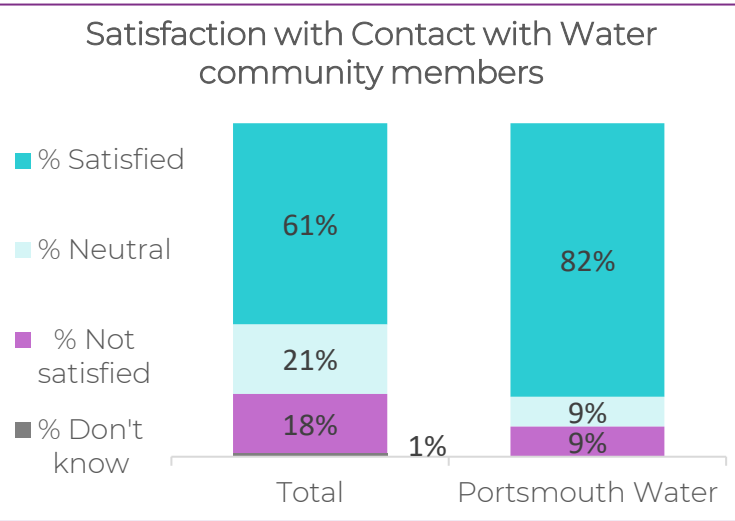


Contact with utility providers

24% of community members have been in contact with Portsmouth Water in the last 12 months. This is below the norm.



Billing enquiries are the main reason for contacting Portsmouth Water. Making a complaint was selected by 45% of Portsmouth Water community members who made contact, a higher number compared to the norm of 18%. 82% of Portsmouth Water community members who made contact were satisfied with that contact. This is higher than the norm.



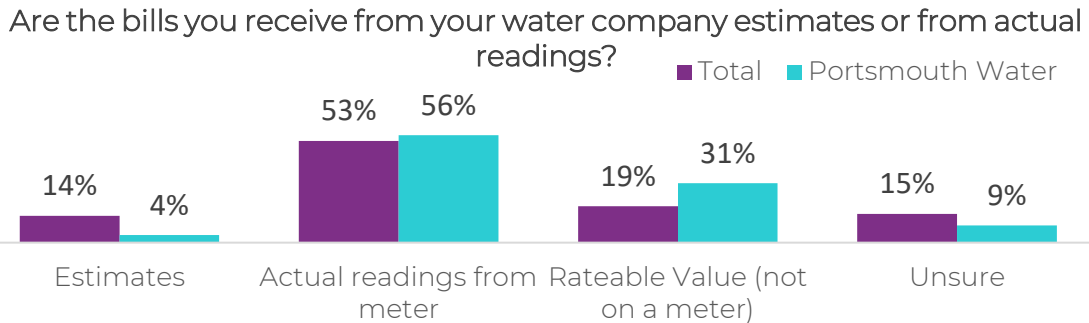
N.B. References to wastewater are not related to Portsmouth Water as they are not the wastewater provider for this community.

Billing

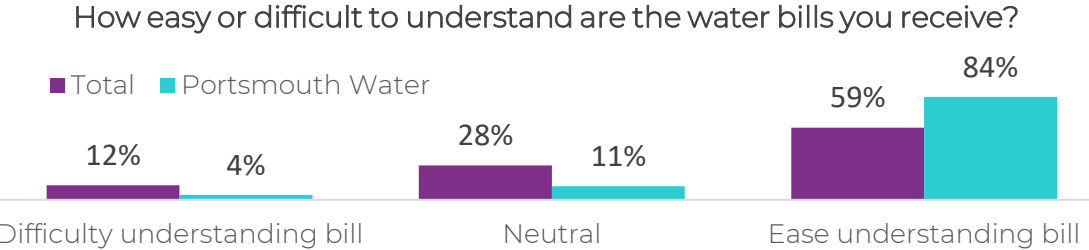


The voice for water consumers
Llais defnyddwyr dŵr

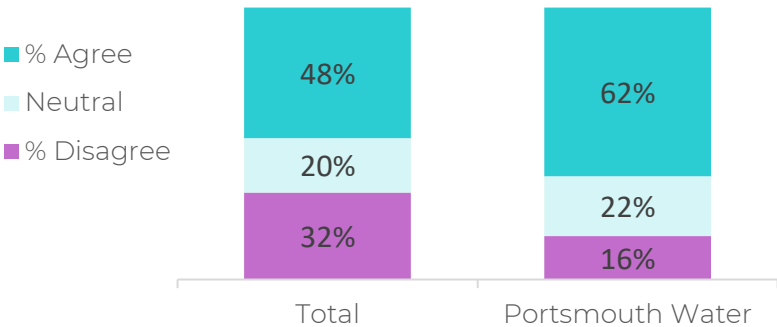
Portsmouth Water community members are more likely than the norm to have their water bills based on rateable value and actual meter readings and less likely to have estimates as a base.



84% of Portsmouth Water community members say they find it easy to understand their water bills, above the norm.

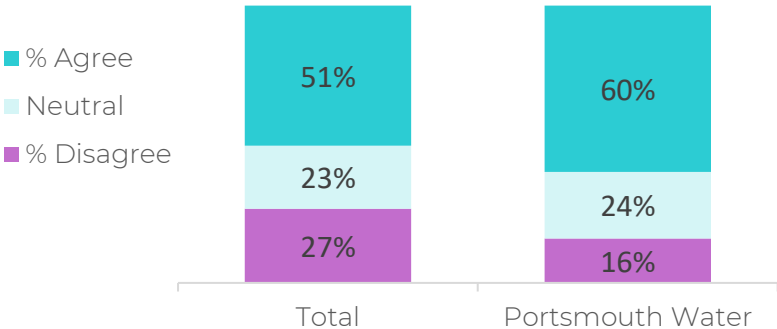


How much do you agree or disagree with the following statements?
I fully understand how my water bill is calculated



62% of Portsmouth Water community members feel they understand how their water bill is calculated, above the norm.

How much do you agree or disagree with the following statements?
The charges I pay for my water bill are affordable to me



Portsmouth Water community members are more likely than the norm to agree that their water bills are affordable and marginally more likely to feel neutral about their bills' affordability.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

South East Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

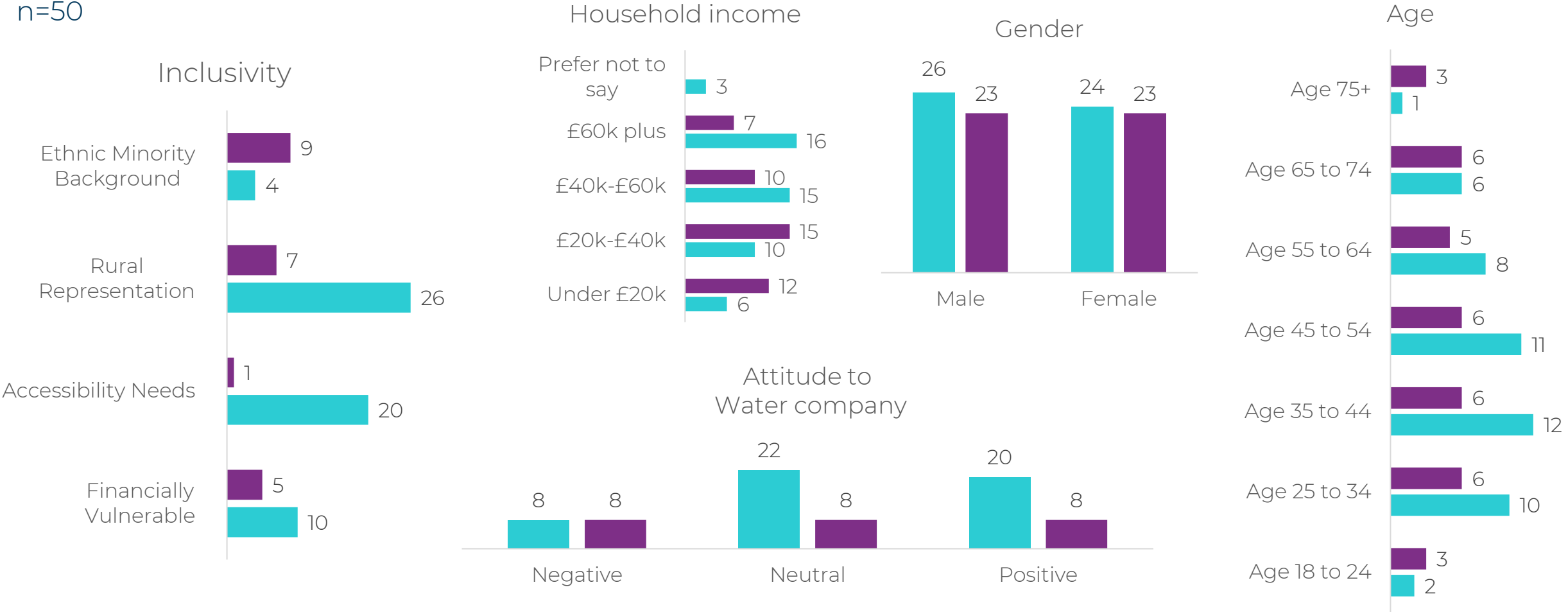
Version: Final copy 15.12.25

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South East Water

Community population

South East Water community members:
n=50



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 we were able to reach our financially vulnerable community members 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 18-24 & 75+ sample by at least 2 for next month.

South East Water

What do South East Water community members hope this community achieves? south east water



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Meaningful action & real improvements:** community members want the platform to provide feedback that leads to active, real improvements.
- **Accountability, better customer service & built trust:** community members want increased accountability from water companies and better customer service and responsiveness.
- **Education & understanding:** provide transparency and education surrounding how water companies operate and what is being done to secure supply and manage sewage issues.
- **Community connection:** interactions and shared problem-solving, through talking to other community members and learning from them and their experiences.



What South East Water community members have said...

"I hope I get educated more on how water companies work and how they do their business as it could help me give a perspective from their side and also hope they listen to what everyone has to say on the panel." Male, 31, Lives with adult family members

"Fewer sewage discharges by water suppliers." Male, 35, Lives with partner

"Get a better understanding on what is being done to ensure continuity of the water supply, the safety and how it will solve the river sewage/issue." Female, 41, Lives alone

"Listen, learn and engage with others." Male, 43, Lives with partner and child/children



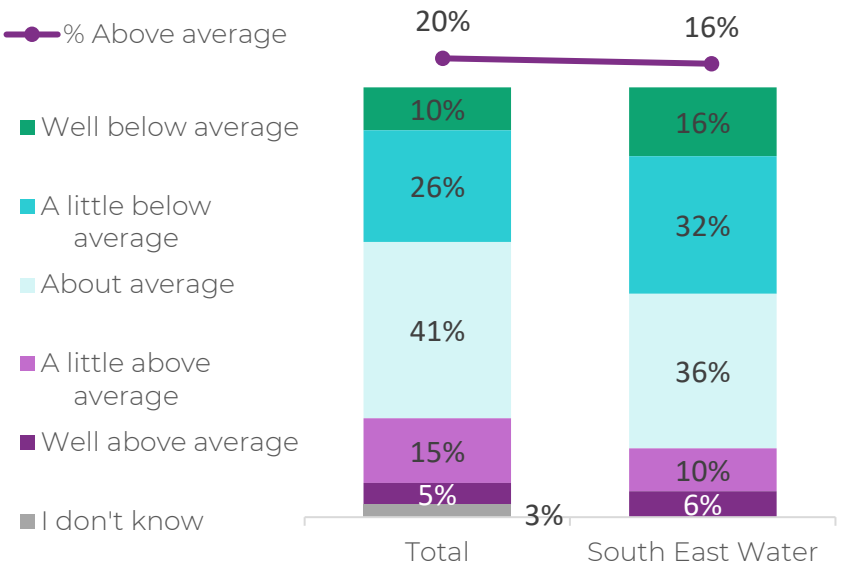
South East Water community members want to drive real, actionable improvements to water services, environmental performance and customer experience, while ensuring community members' voices are genuinely listened to and acted upon. They value transparency, shared learning, community dialogue, and greater accountability from water companies to build trust and deliver better outcomes for all.

Active community members
Total Base Size: 755
South East Water Base Size: 50

Water Use at Home

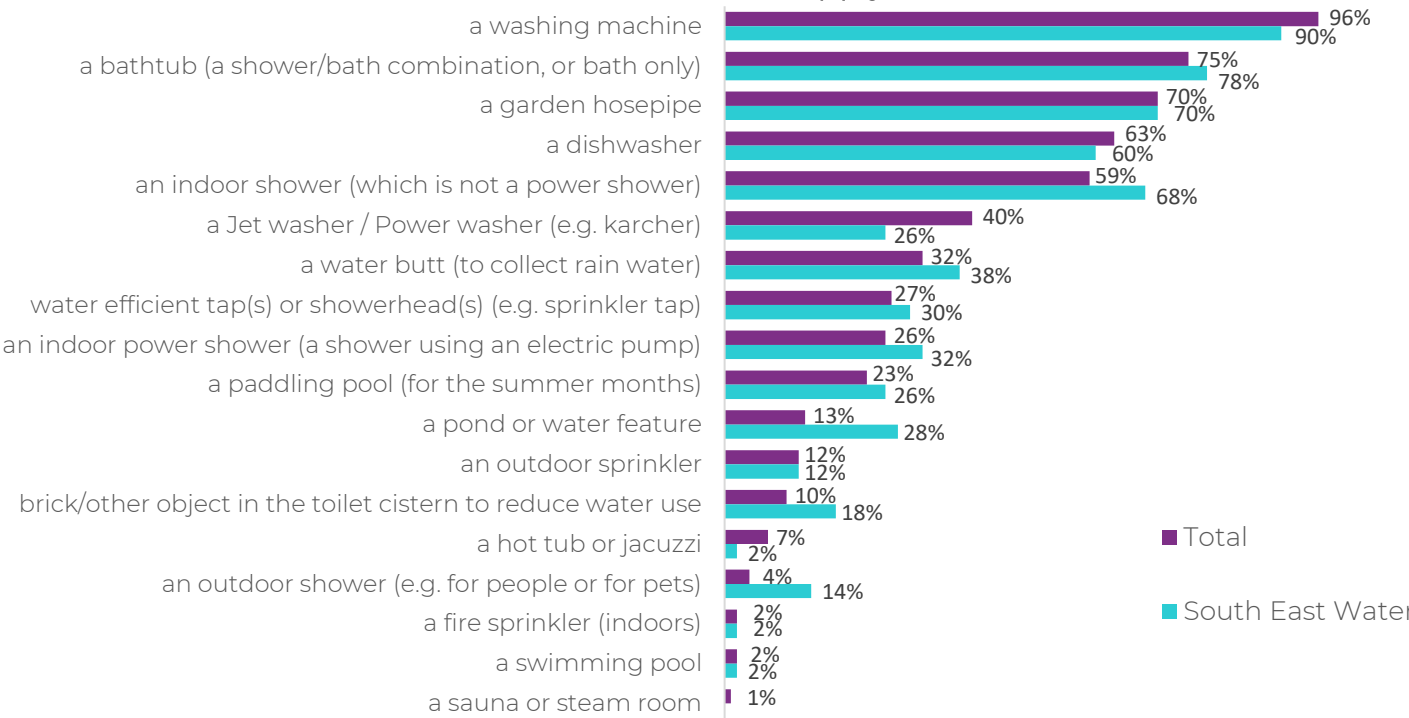
South East Water community members are less likely than the norm to report their water consumption as “above average”. Compared to the norm, a greater number are saying that they use “below average”, and a lower number are saying they use “about average”.

In a typical week, how much water would you say your household uses vs a similar household?



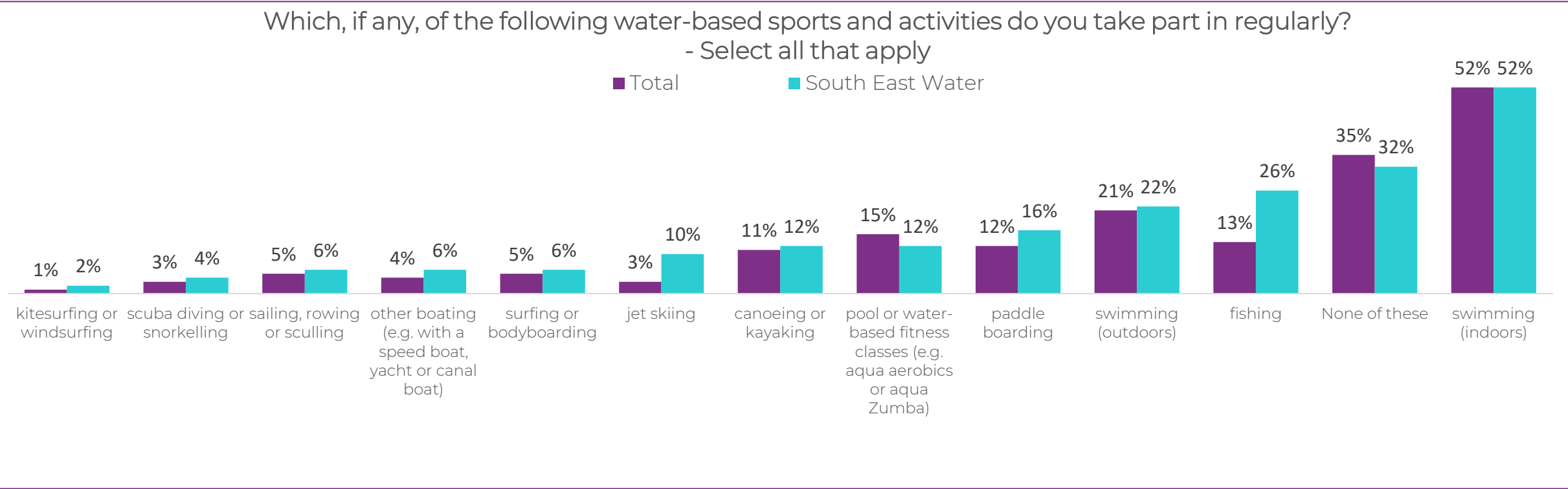
South East Water community members are more likely than the norm to have a pond or water feature and an outdoor shower. Fewer have a jet washer / power washer and a hot tub or jacuzzi.

Which, if any of the following do you, or anyone who lives with you, use/have at home? - Select all that apply



Water Locations & Activities

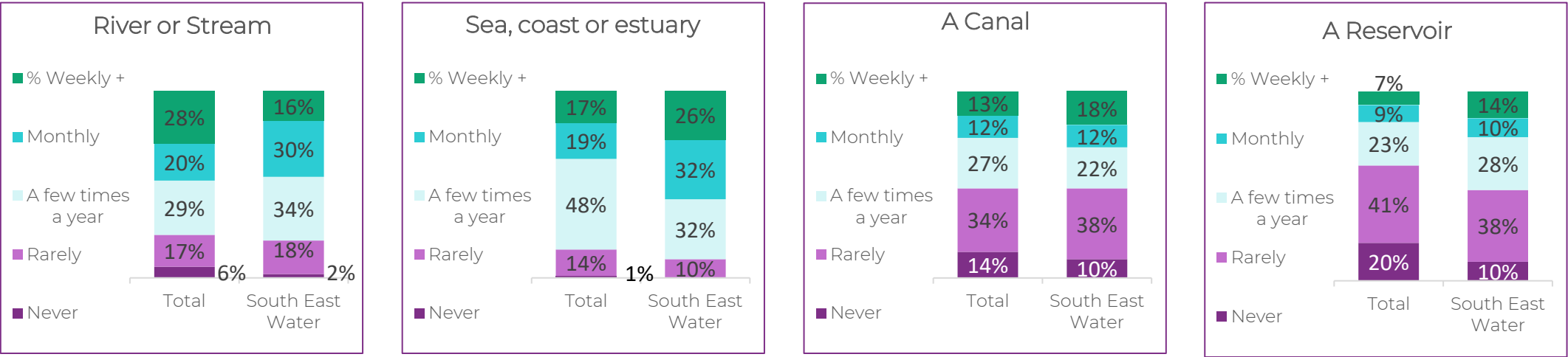
Swimming (indoors) is the most common water-based activity for South East Water community members. 32% do not regularly participate in any of the activities listed. Fishing and swimming (outdoors) are the next most common activities, with fishing above the norm.

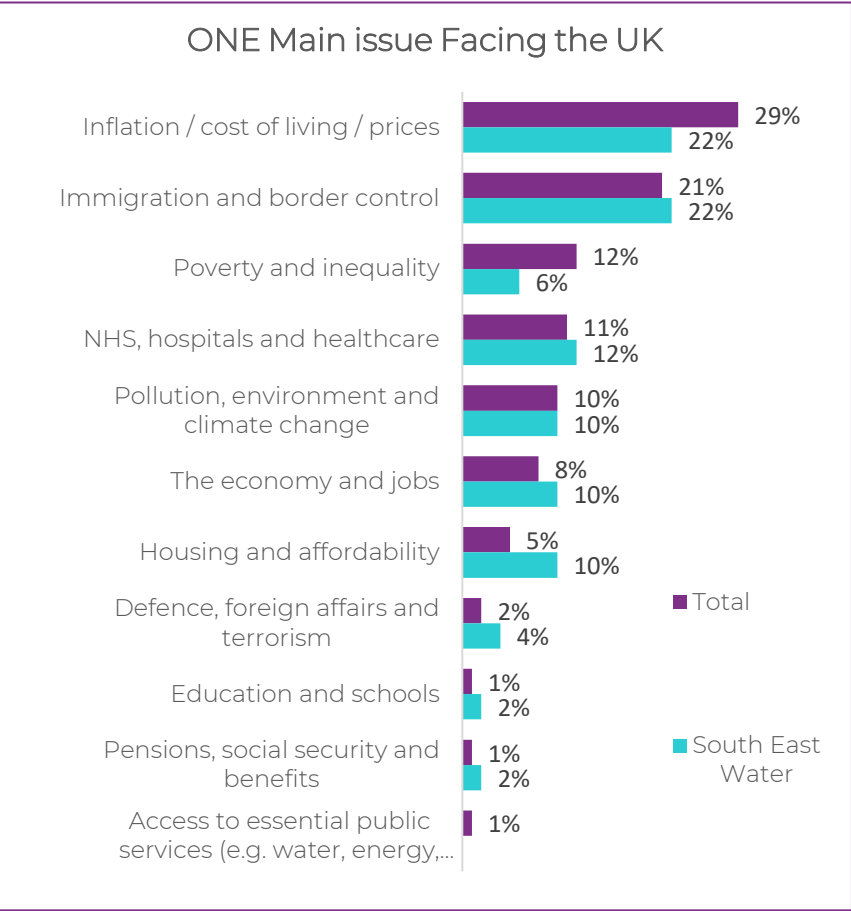
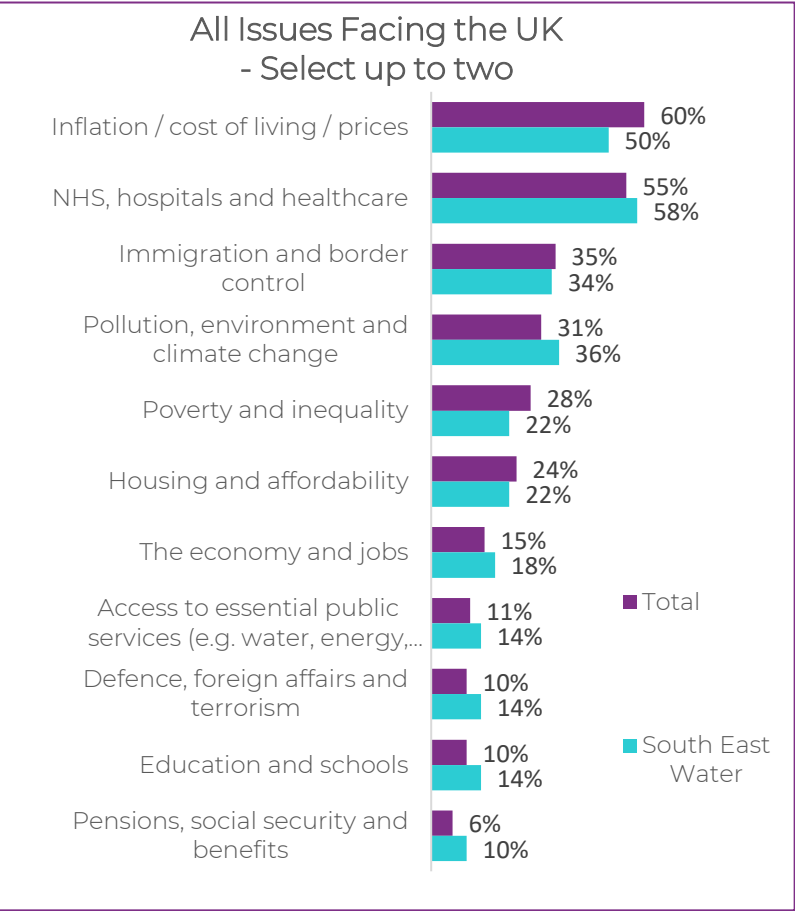


Water Locations & Activities

South East Water community members are more likely than the norm to visit a river or stream monthly and less likely to visit the sea, coast or estuary just a few times a year. They are also more likely than the norm to visit a canal or reservoir weekly.

How often, if at all, do you spend time by or on the water at any of these places shown below?





South East Water community members have told us what they feel the main issues facing the UK are. The main issue is equally split between:

- Inflation / cost of living / prices
- Immigration and border control

NHS, hospitals and healthcare ranks as second single biggest issue.

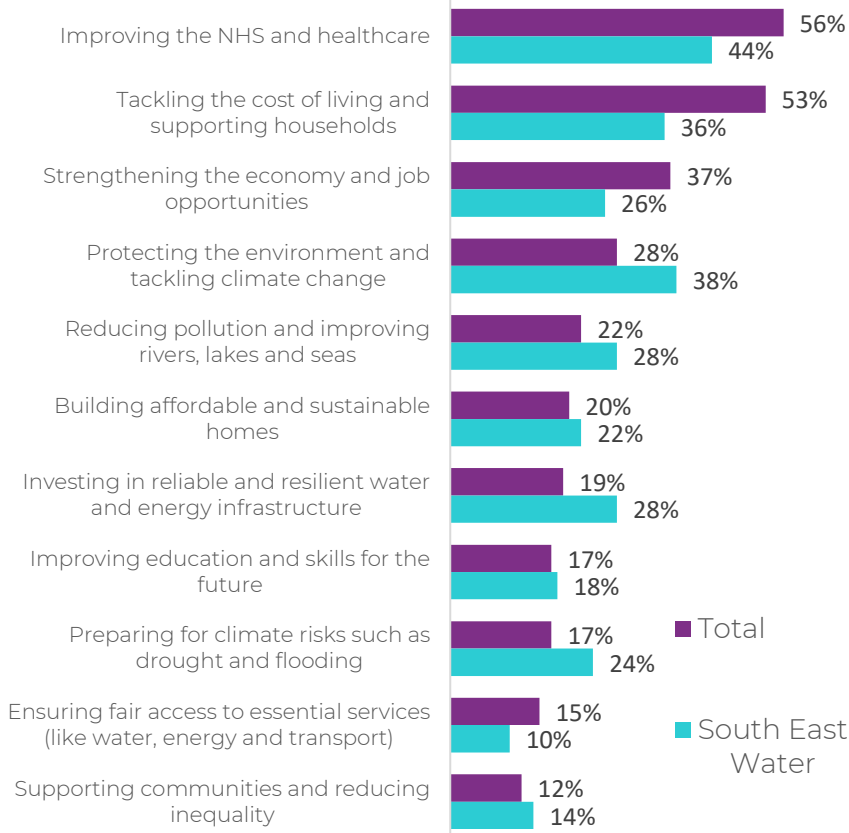
They are less likely to see poverty and inequality as a top issue compared to the norm: while the norms ranks it in third, it goes down to sixth for South East Water community members.

UK Priorities

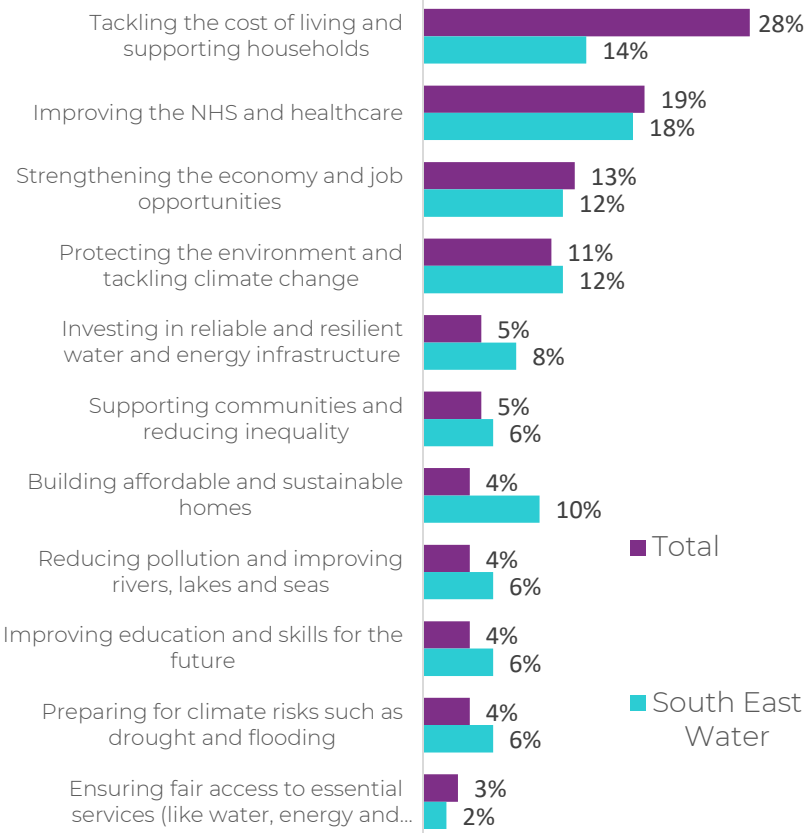
South East Water community members rank improving the NHS and healthcare as their top priority. The second top priority is tackling the cost of living and supporting households (below the norm).

South East Water community members are more likely than the norm to see building affordable and sustainable homes as a top priority.

Priorities for Government and Public Investment - Select up to two



ONE Top National Priority

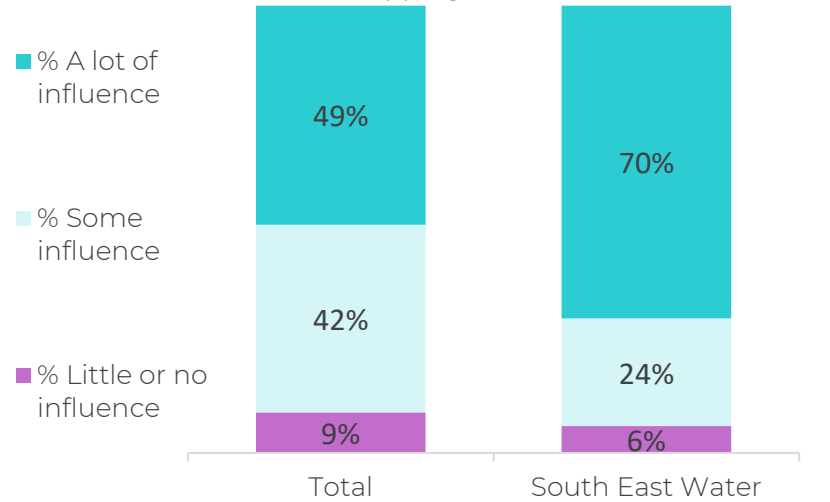


Environment Concerns

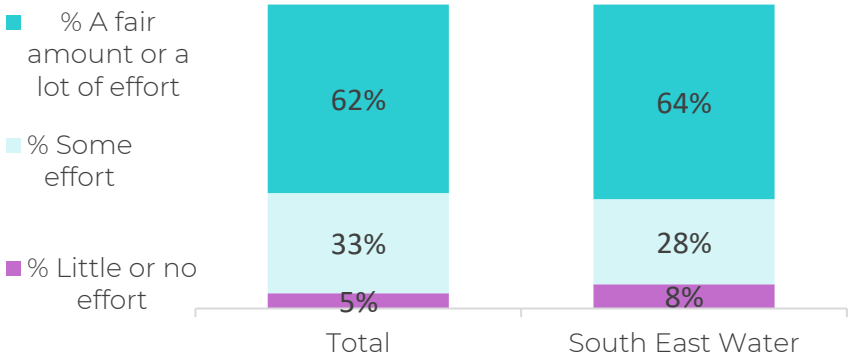
Including Saving Water & Energy

South East Water community members are more likely than the norm to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

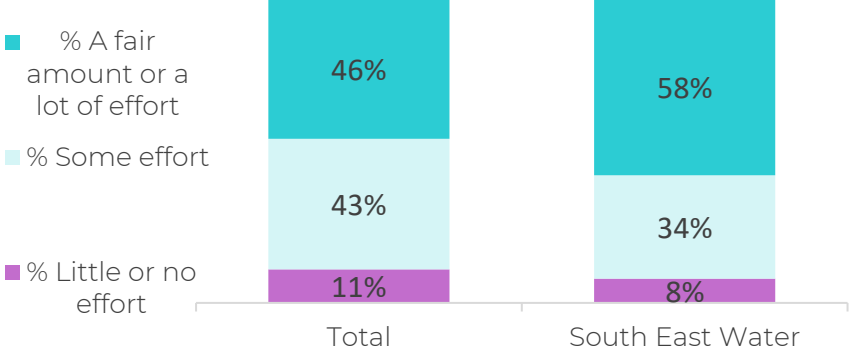


How much effort does your household make at home to save ENERGY?



64% of South East Water community members say they make a fair amount or a lot of effort to save energy. This is marginally above the norm.

How much effort does your household make at home to save WATER?



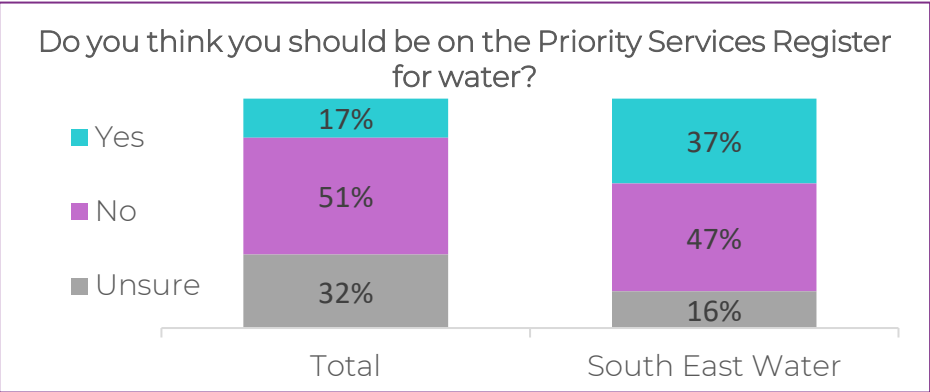
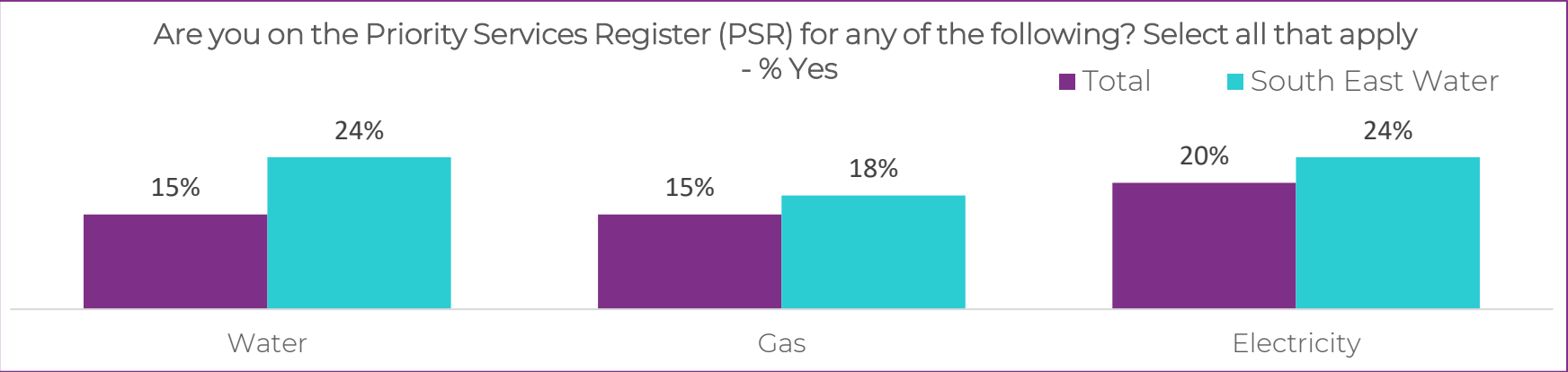
South East Water community members say they are more likely to make a fair amount or a lot of effort to save water than the norm.

Priority Services Register

Overall, 52% of South East Water community members say they have heard of the Priority Services Register.



A higher proportion of South East Water community members say they are on the Priority Services Register for water and electricity than for gas and they are more likely to be on the registers compared to the norm.



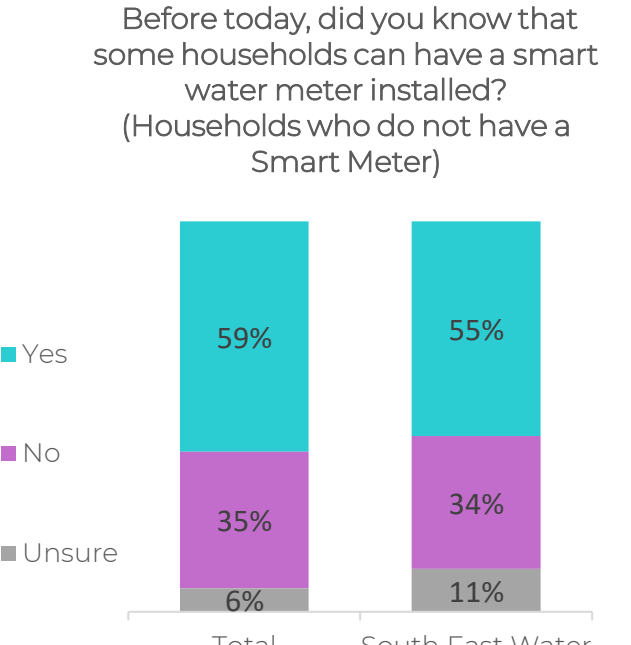
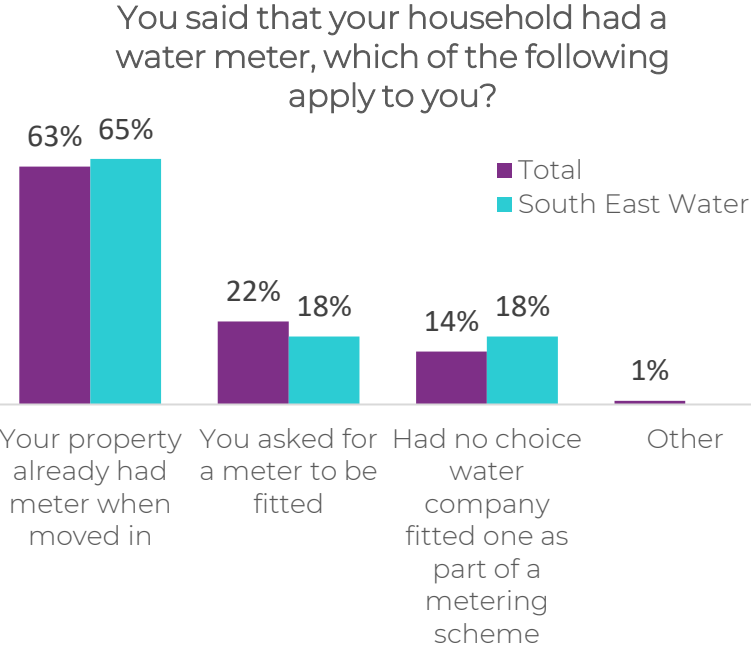
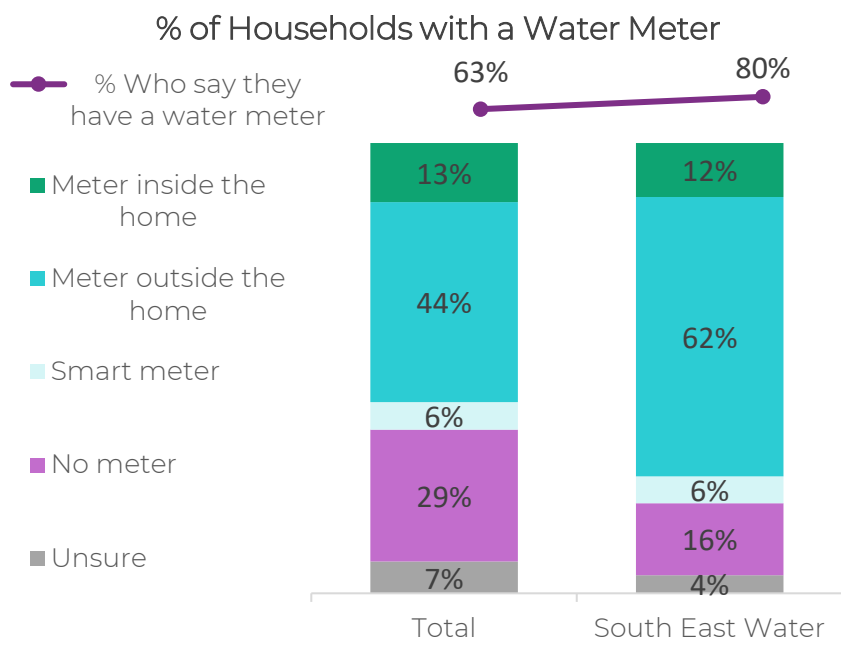
For those not currently on the Priority Services Register for water, 37% of South East Water community members think they should be on it.

Water Meters

South East Water community members are more likely than the norm to have a water meter, driven by a higher number with a meter outside the home.

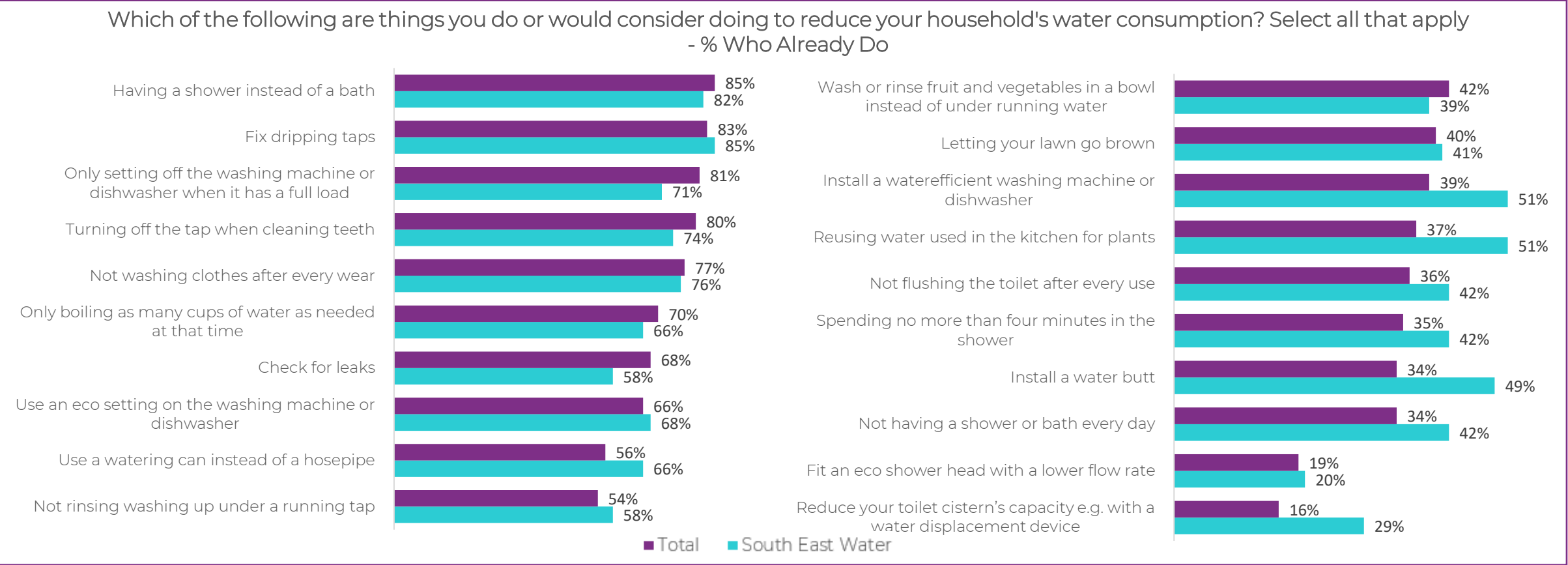
Among South East Water community members who have a water meter, 65% already had in the property when they moved in (marginally higher than the norm).

55% of South East Water community members say they know that households can have a smart water meter installed; slightly below the norm.



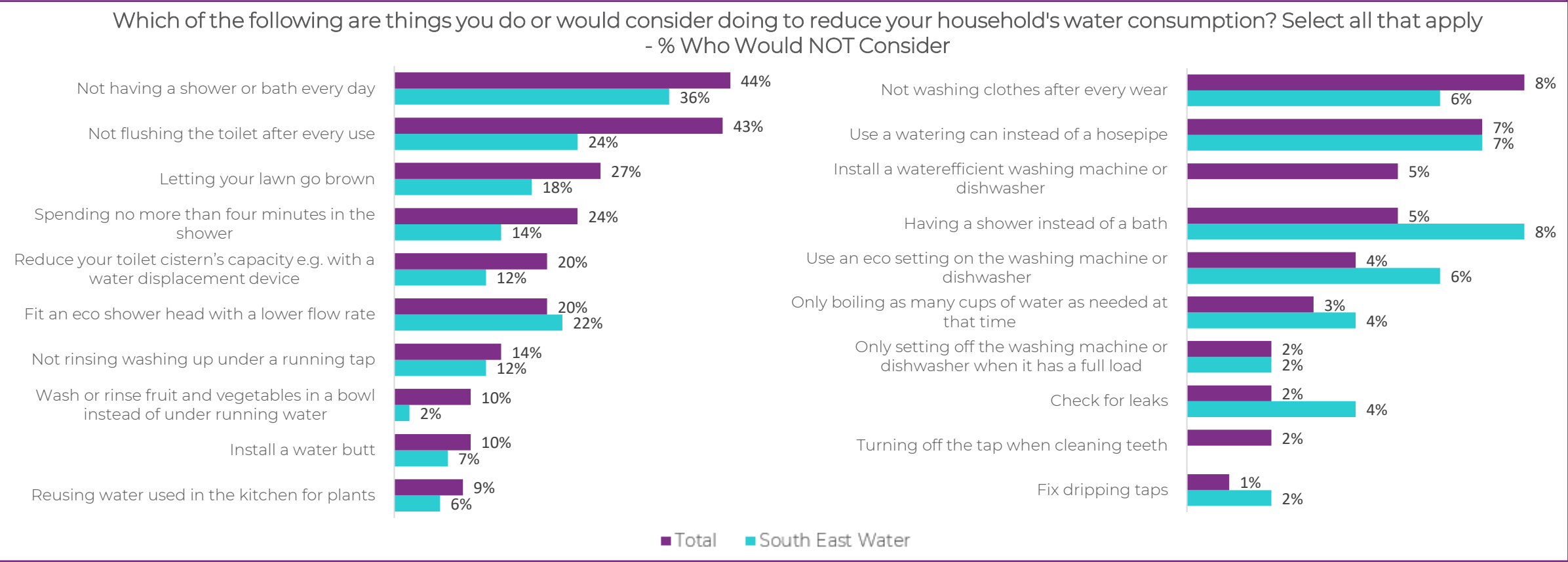
Water-Saving Measures

The majority of South East Water community members (and a higher number compared to the norm) say they are already switching to fixing dripping taps, using an eco setting on the washing machine or dishwasher, and using a watering can instead of a hosepipe.



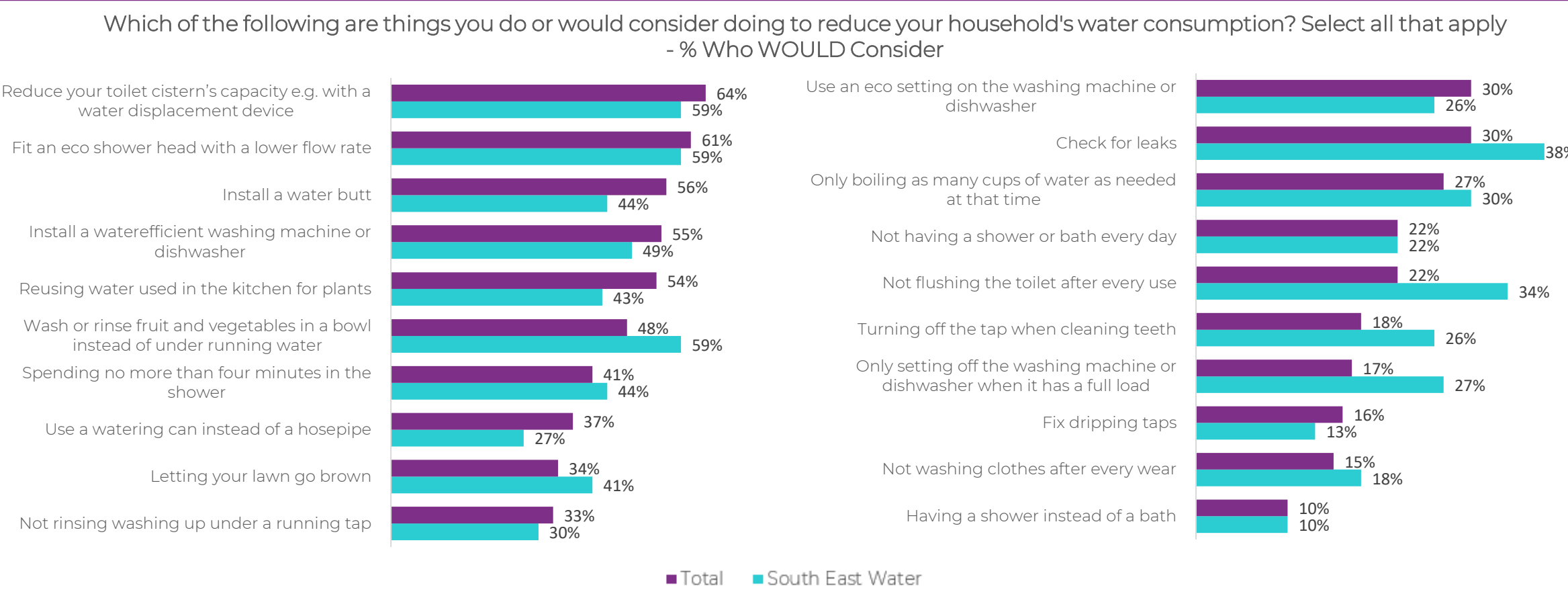
Water-Saving Measures

For South East Water community members, the water-saving measures generating the greatest resistance are not having a shower or bath every day, not flushing the toilet after every use, and fitting an eco shower head with a lower flow rate.



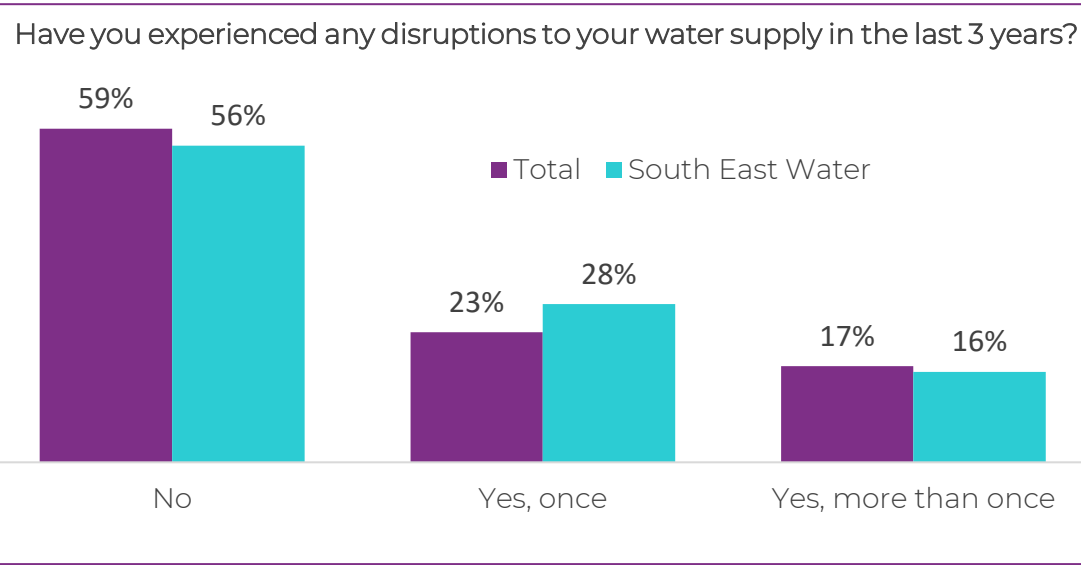
Water-Saving Measures

For South East Water community members, the highest levels of openness are to reducing the toilet cistern's capacity, fitting an eco shower head, and washing or rinsing fruit and vegetables in a bowl.

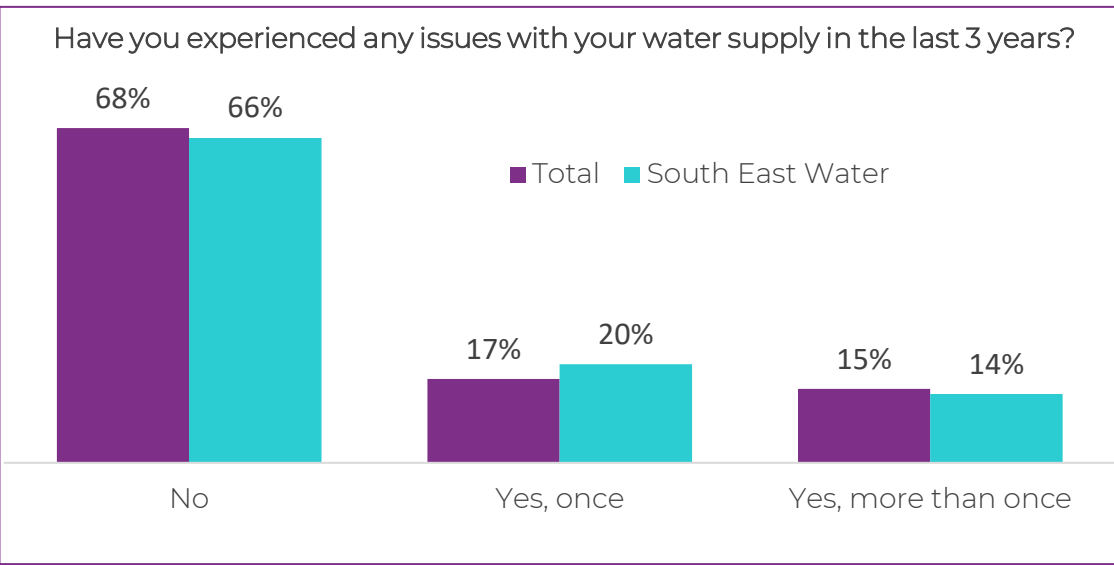


Disruptions & Issues

56% of South East Water community members say they have not experienced supply disruptions in the last 3 years (slightly lower than the norm). 28% have had one disruption (slightly above the norm) and 16% have had a disruption more than once.

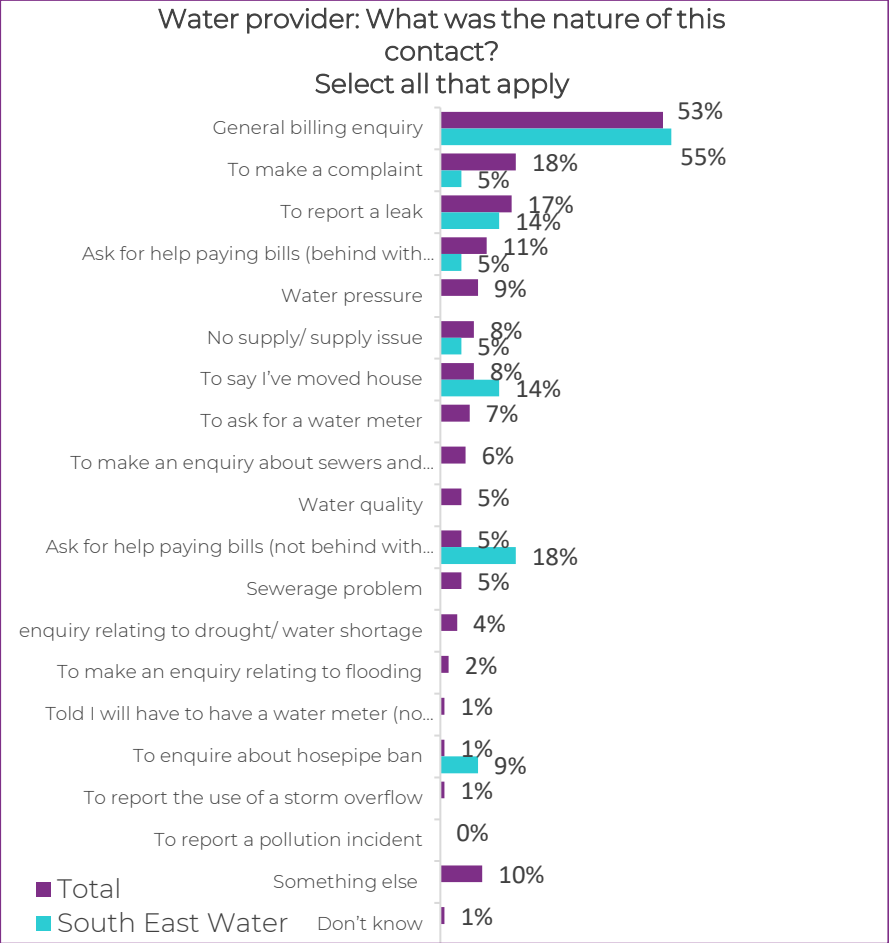
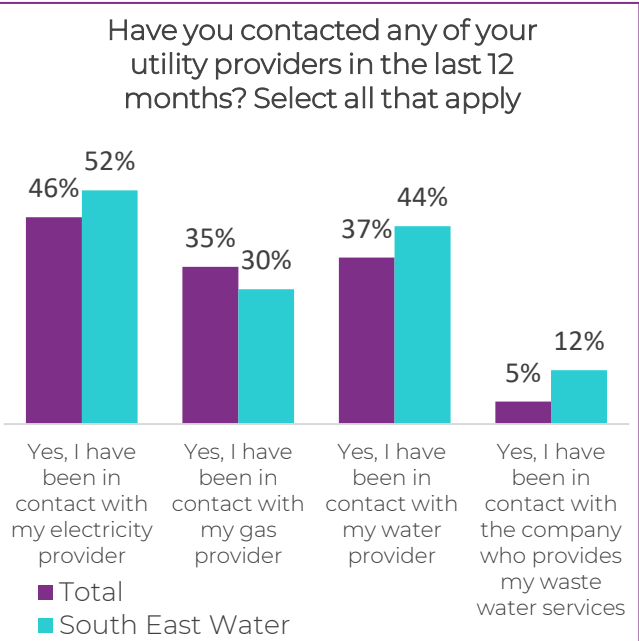


66% of South East Water community members say they have had no issues with water quality in the last 3 years, marginally below the norm. 20% have had one issue (slightly above the norm) and 14% more than one issue.

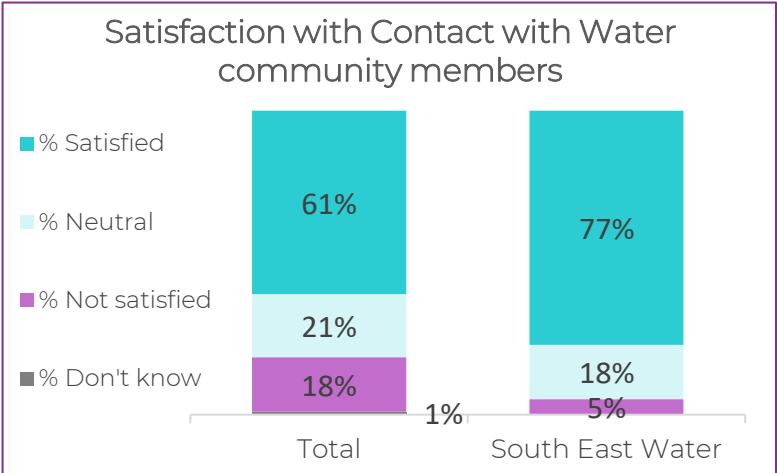


Contact with utility providers

44% of community members have been in contact with South East Water in the last 12 months. This is above the norm.



Billing enquiries were the main reason for community members to contact South East Water. Making a complaint was selected by 5% of South East Water community members, a lower number compared to the norm of 18%. 77% of South East Water community members who made contact were satisfied with that contact. This is higher than the norm.

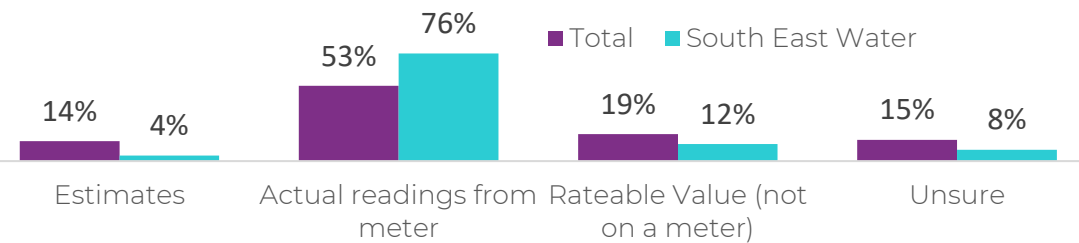


N.B. References to wastewater are not related to South Staffs Water and Cambridge Water as they are not the wastewater provider for this community.

Billing

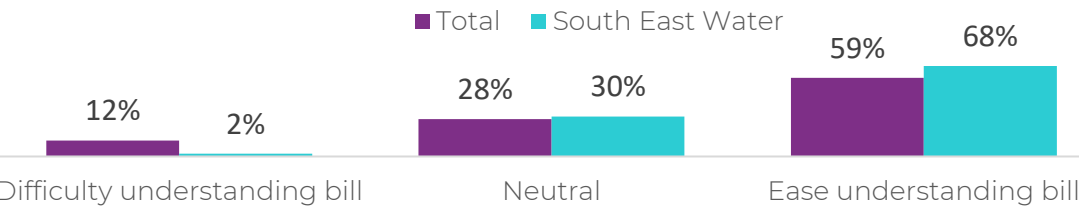
South East Water community members are more likely than the norm to have their water bills based on actual meter readings and less likely to have estimates or rateable value as the base.

Are the bills you receive from your water company estimates or from actual readings?



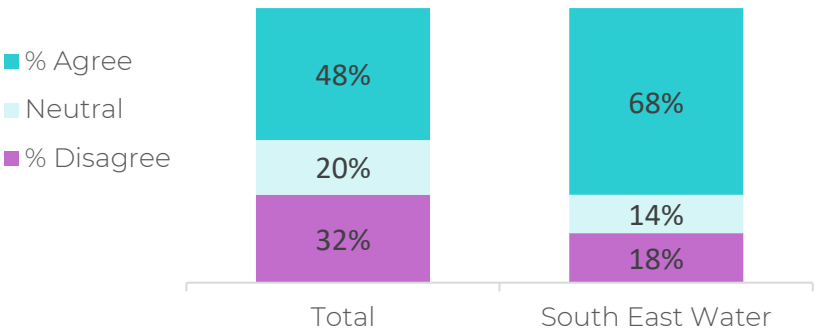
68% of South East Water community members say they find it easy to understand their water bills. This is above the norm.

How easy or difficult to understand are the water bills you receive?



How much do you agree or disagree with the following statements?

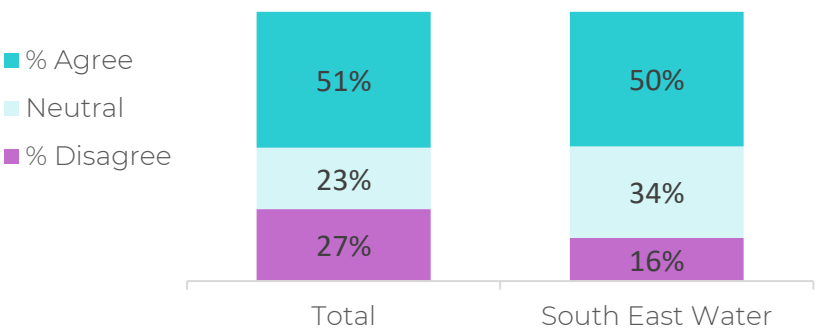
I fully understand how my water bill is calculated



68% of South East Water community members feel they understand how their water bill is calculated. This is above the norm.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



South East Water community members are more likely than the norm to feel neutral about the affordability of their water bill.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

South Staffs Water and Cambridge
Water

November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

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South Staffs Water and Cambridge Water

Community population



South Staffs Water



Cambridge Water

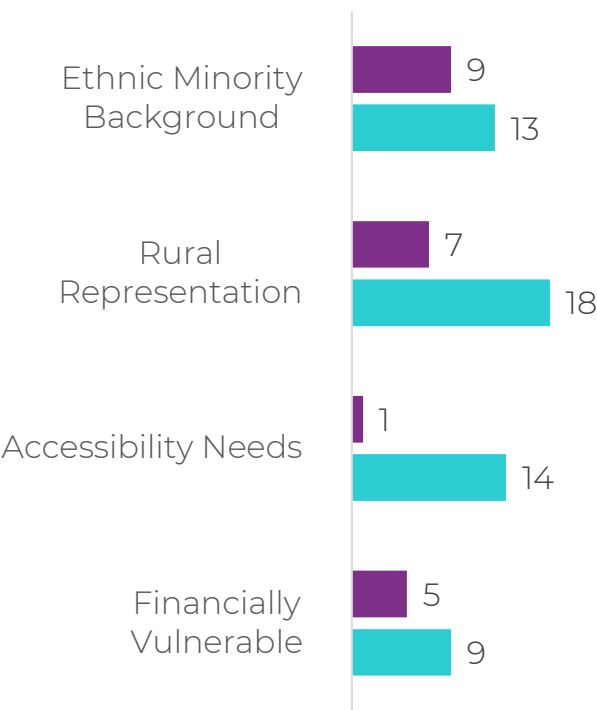


The voice for water consumers
Llais defnyddwyr dŵr

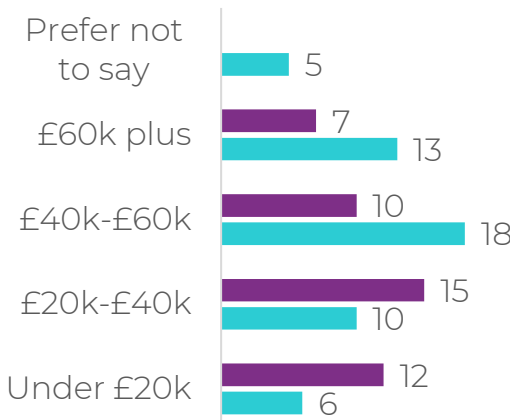
South Staffs Water community members: n=31

Cambridge Water community members: n=21

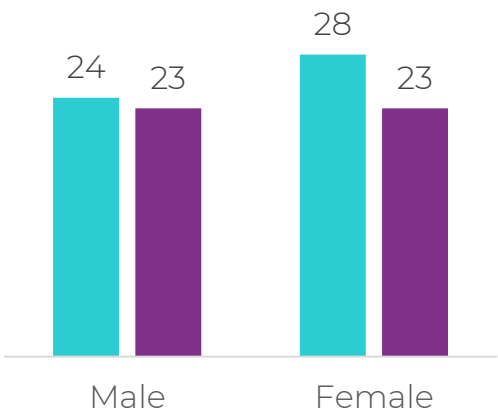
Inclusivity



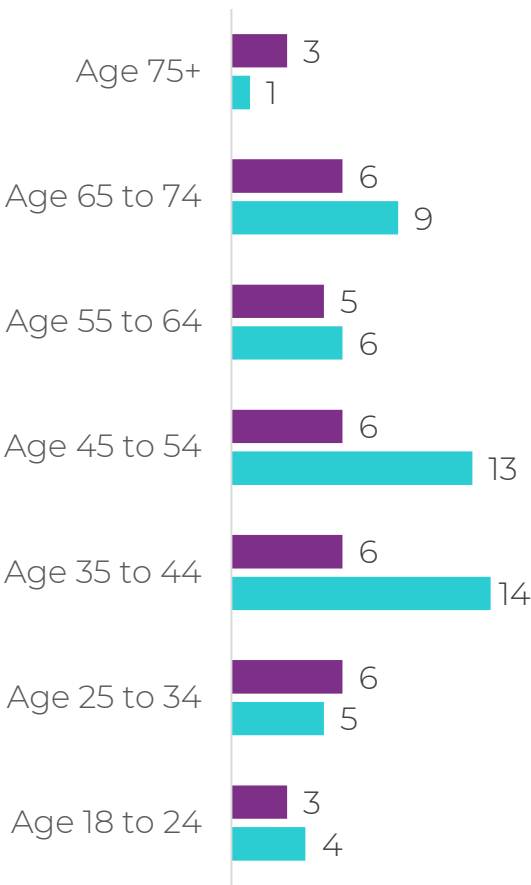
Household income



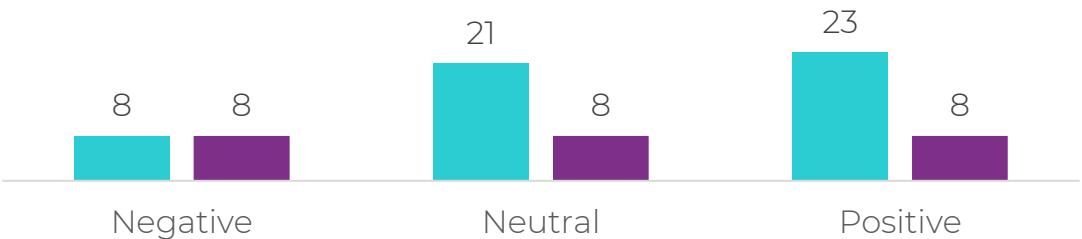
Gender



Age



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 we were able to reach our financially vulnerable community members 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 75+ sample by at least 2 for next month.

Current Quota

Minimum Quota

South Staffs Water & Cambridge Water

What do South Staffs & Cambridge Water community members hope this community achieves?



Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Influencing change:** need for community members to be heard and taken seriously; water companies to list to public views and concerns.
- **Service improvements & better customer outcomes:** improved reliability, pressure, taste and cleanliness of water, and better customer service and responsiveness from the water companies.
- **Transparency, truth & accountability:** a need for clearer, more honest communication and for water companies to show greater accountability for failures or environmental harm.
- **Environmental protection:** cleaner water in rivers and natural sources, reduce waste, pollution and sewage releases.
- **Learning & understanding the system:** value for the community's education role and allowing community members to understand how water companies work.

“

What South Staffs & Cambridge Water community members have said...

“Gives the Company a chance to hear what regular customers think and maybe improve their processes or policies.” Male, 59, Lives with partner, Cambridge Water

“I hope the Water Voice panel helps raise awareness about the importance of protecting and managing our water resources more responsibly.” Female, 55, Lives with partner, South Staffs Water

“A better service for all which could ultimately bring down prices but also working to improve environmental issues. Plus helping to educate others about issues they may not be aware of” Female, 54, Lives with partner and child/children

”

South Staffs Water & Cambridge Water community members want to strengthen transparency, accountability, and active listening from water companies while driving meaningful improvements in customer service, environmental protection, and operational performance.

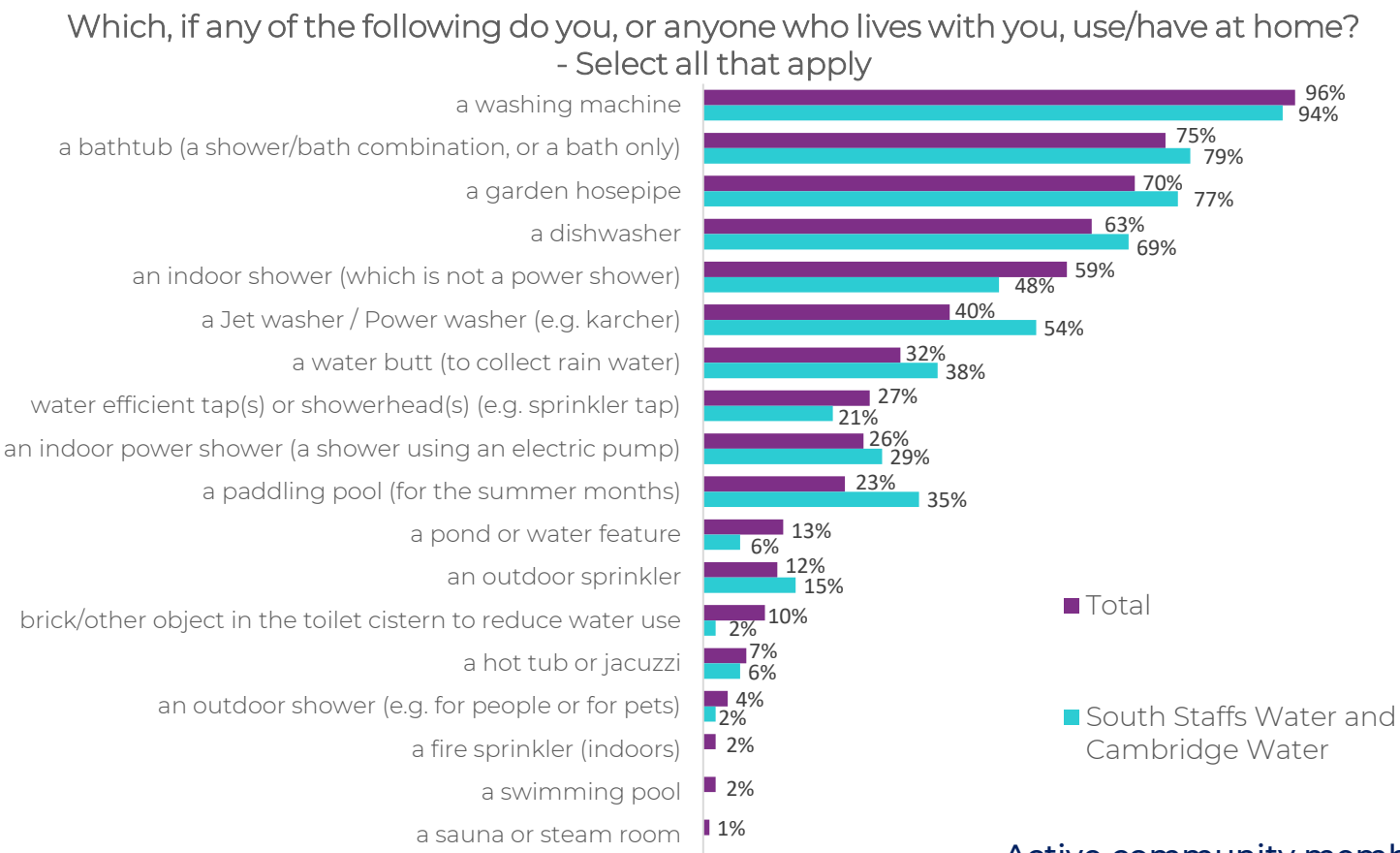
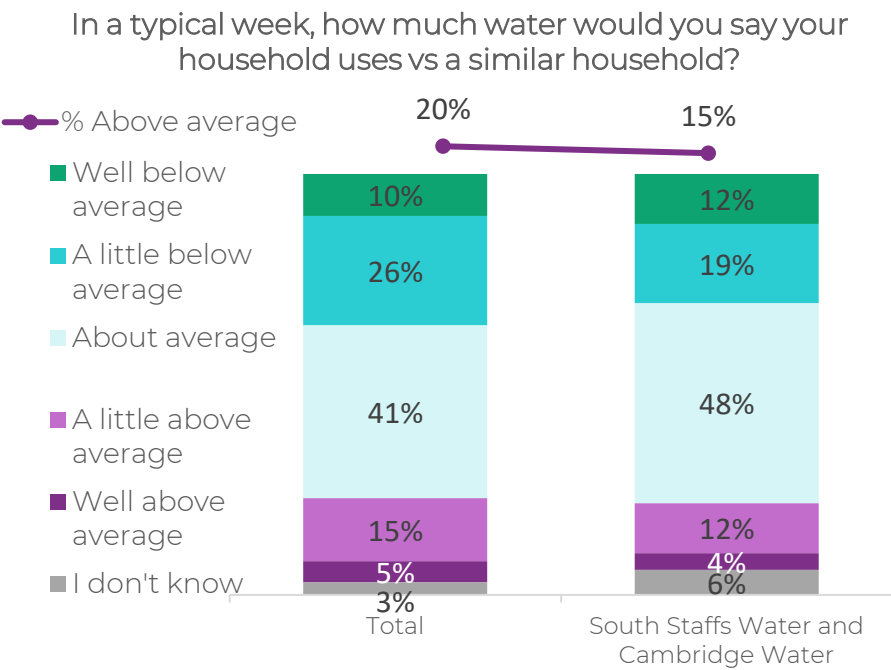
Active community members
Total Base Size: 755

South Staffs & Cambridge Water Base Size: 52

Water Use at Home

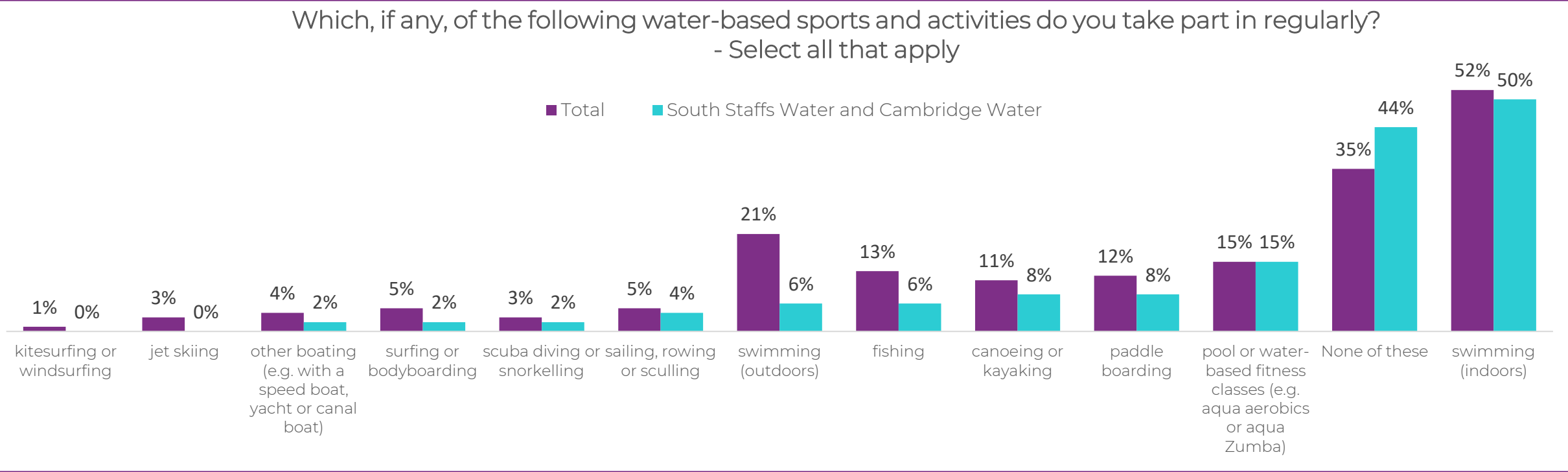
South Staffs & Cambridge Water community members are slightly less diverse in their water consumption than the norm. A greater number say that they use “about average” water. Less community members than the norm feel they are using above average amounts of water.

A higher number of South Staffs & Cambridge Water community members have a bathtub, garden hosepipe and dishwasher than the norm. Fewer have a washing machine and indoor shower.



Water Locations & Activities

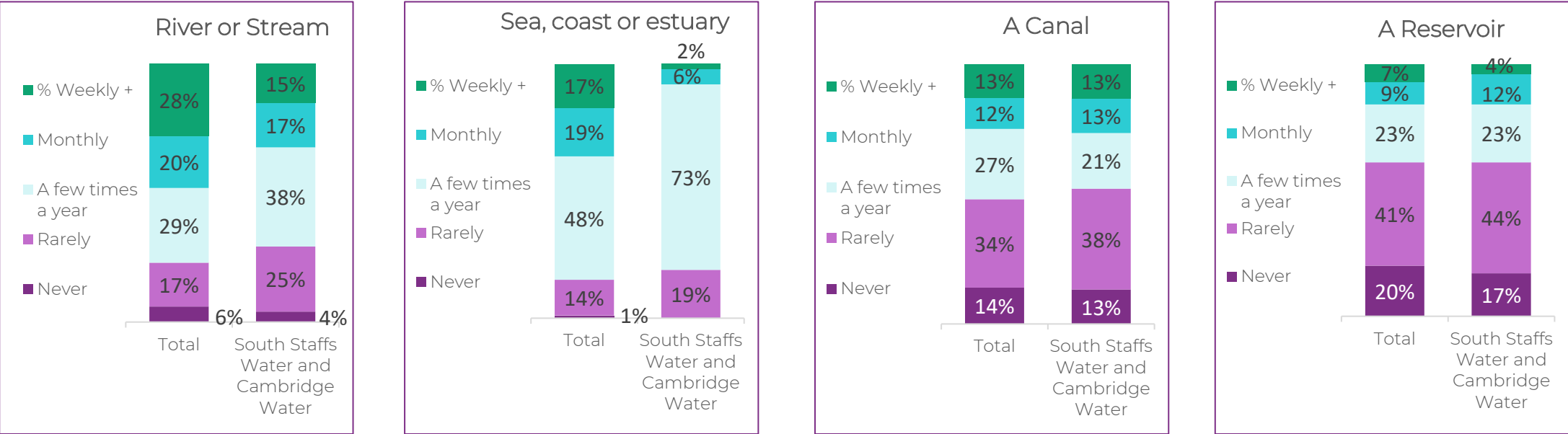
Swimming (indoors) is by far the most common water-based activity both in across the full sample, but also for South Staffs & Cambridge Water. However, these community members are more likely than the norm to not do any water-based sports or activities regularly.



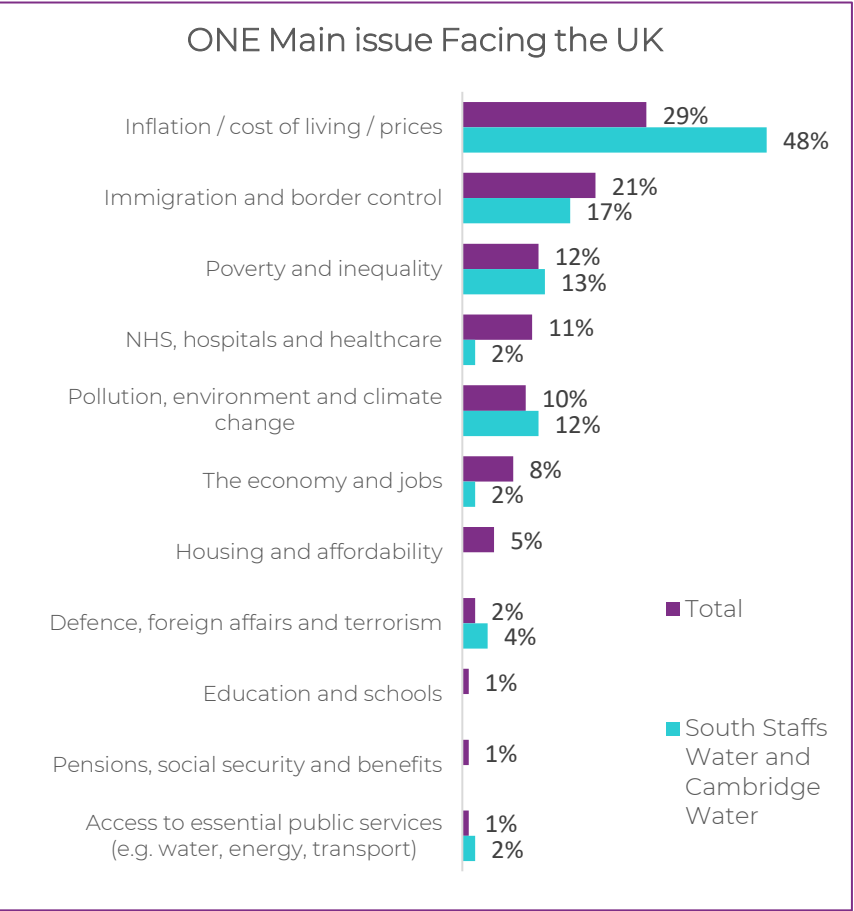
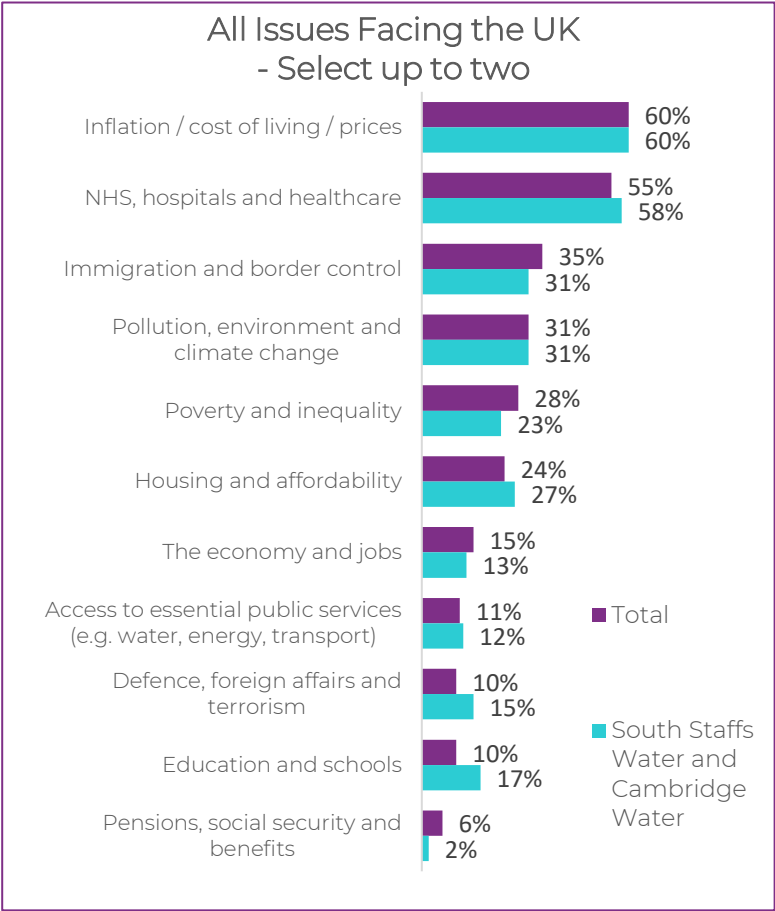
Water Locations & Activities

South Staffs Water and Cambridge Water community members are less likely than the norm to be frequent visitors of rivers, streams, the sea, coast or estuary or a canal.

How often, if at all, do you spend time by or on the water at any of these places shown below?



UK Issues



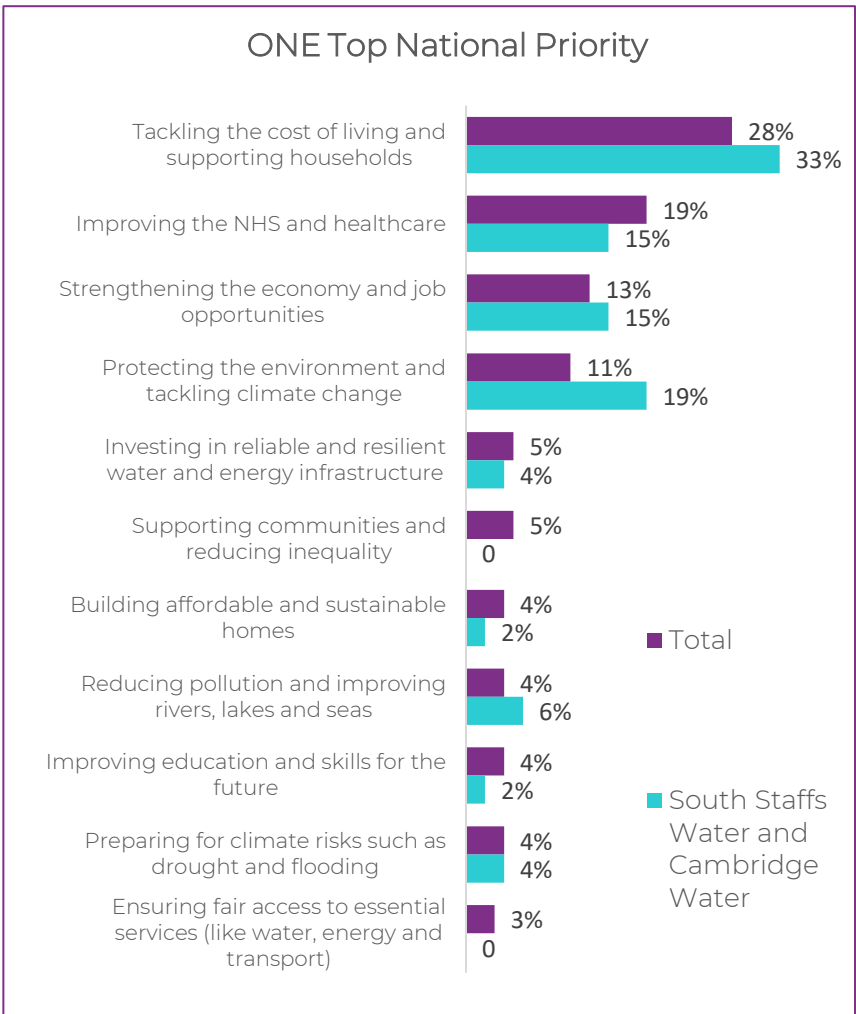
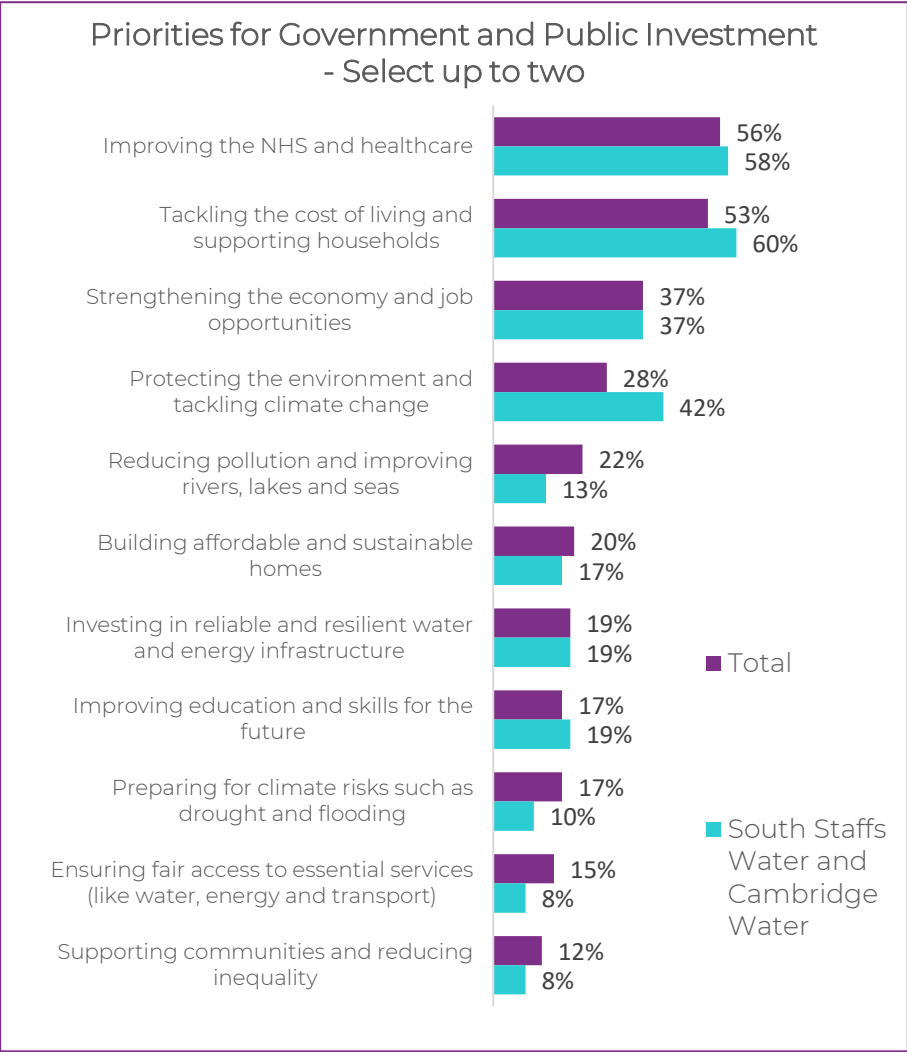
The cost of living, inflation and prices is viewed by South Staffs Water and Cambridge Water community members as the biggest issue facing the UK, and also by a higher number than the norm as the single biggest issue facing the UK today.

They are also more likely to see the NHS, hospitals and healthcare as a bigger issue than immigration and border control (which the norm sees as the second biggest issue).

UK Priorities

In total, the most commonly mentioned priority is improving the NHS and healthcare followed by with tackling the cost of living and supporting households. South Staffs Water & Cambridge Water community members rank tackling the cost of living as the top priority, followed by improving the NHS and healthcare.

South Staffs Water & Cambridge Water community members are also more likely than the norm to see tackling the cost of living and supporting households and protecting the environment and tackling climate change as the single top priority.

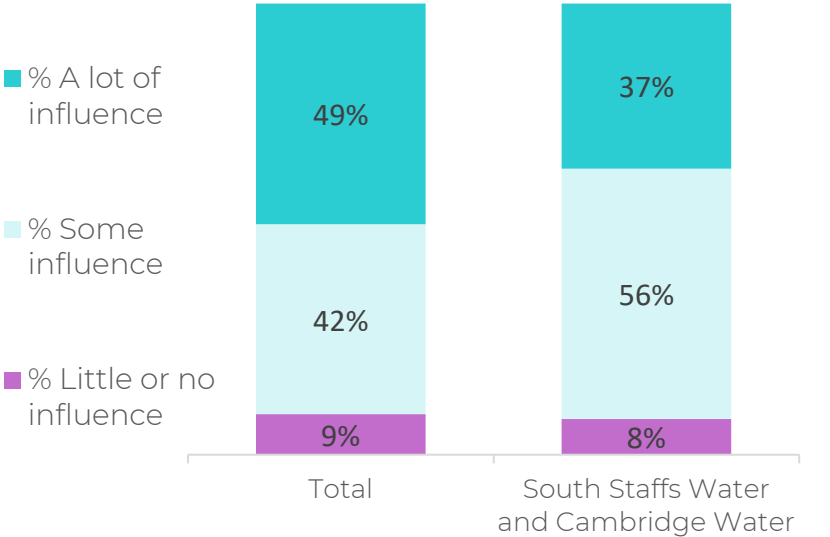


Environment Concerns

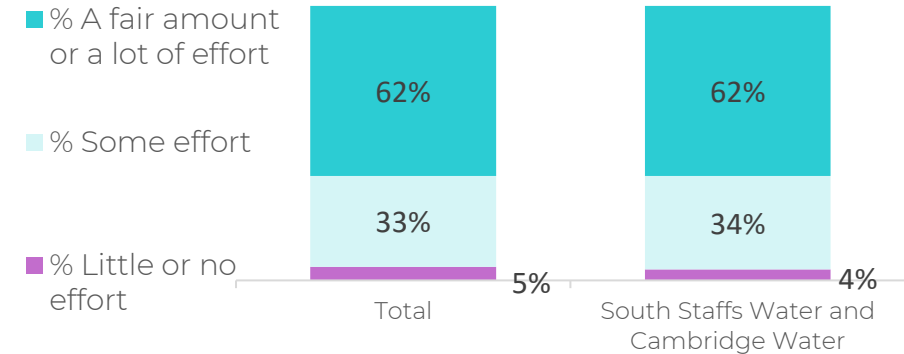
Including saving water & energy

South Staffs Water and Cambridge Water community members are less likely to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

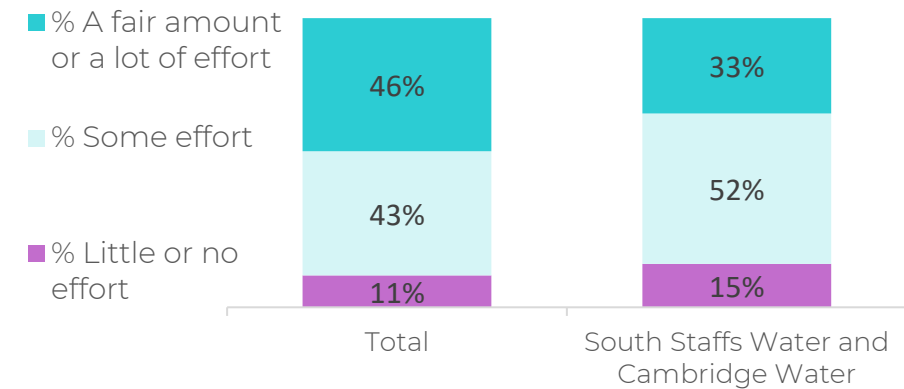


How much effort does your household make at home to save ENERGY?



62% of South Staffs Water and Cambridge Water community members (on a par with the norm), say they make a fair amount or a lot of effort to save energy.

How much effort does your household make at home to save WATER?

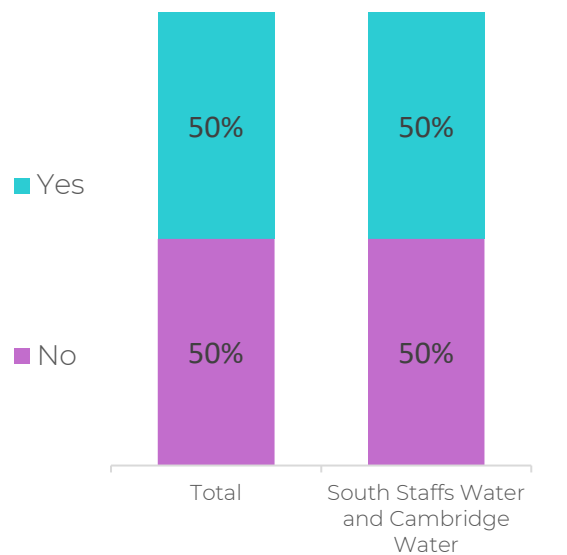


33% of South Staffs Water and Cambridge Water community members say they are making a fair amount or a lot of effort to save water; this is considerably lower than the norm (46%).

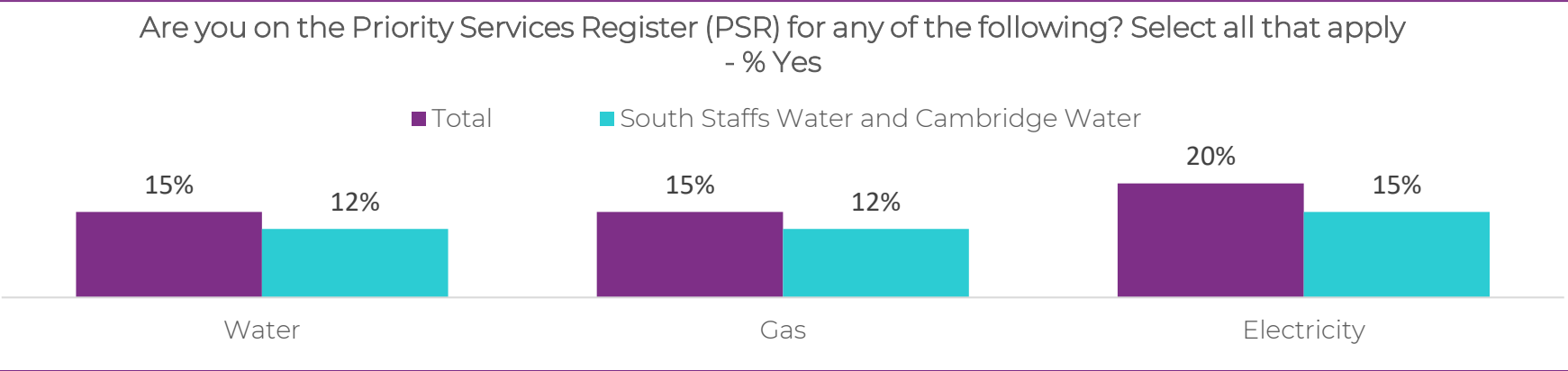
Priority Services Register

Overall, 50% of South Staffs & Cambridge Water community members say they have heard of the Priority Services Register.

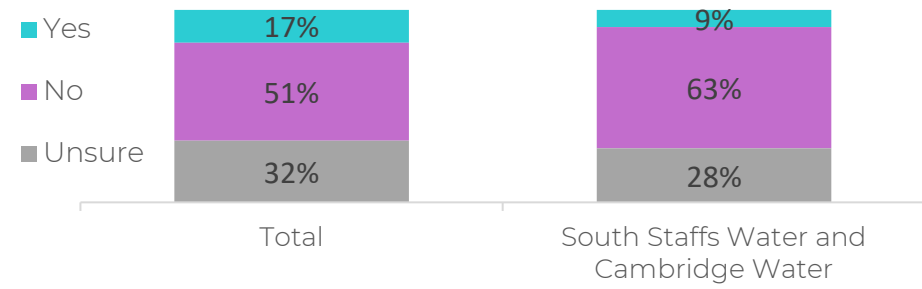
Before today, had you heard about the Priority Services Register?



A lower proportion of South Staffs & Cambridge Water community members say they are on the Priority Services Register for water, gas and electricity compared to the norm.



Do you think you should be on the Priority Services Register for water?



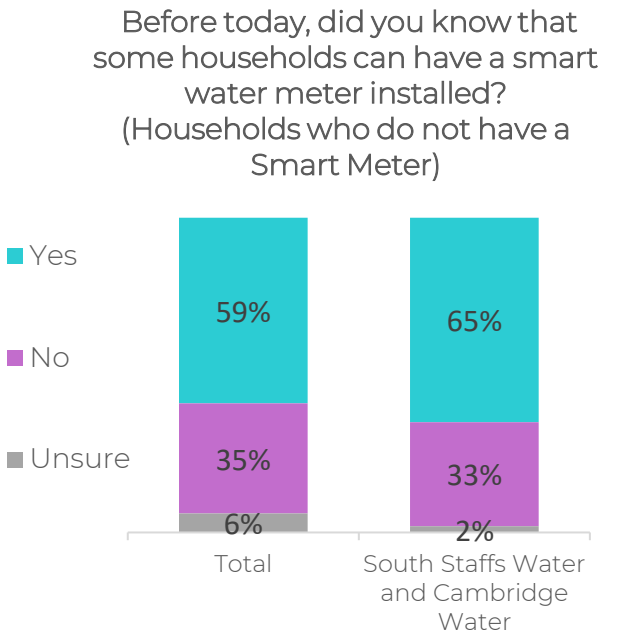
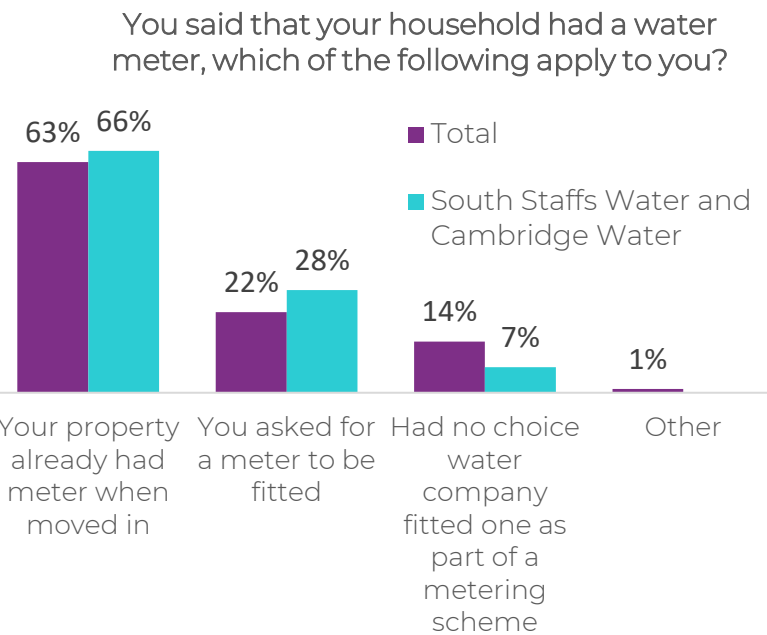
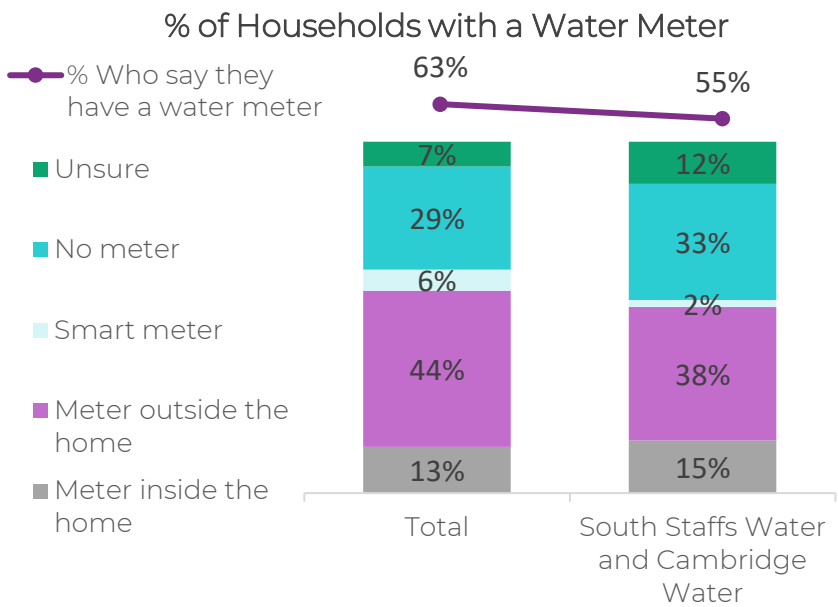
For those not currently on the Priority Services Register for water, 9% of South Staffs & Cambridge Water community members think they should be on it.

Water Meters

Overall South Staffs Water and Cambridge Water community members are less likely than the norm to have a water meter. Those who do have a meter are more likely to have it inside their home. They are less likely than the norm to have a meter outside the home or have a smart meter.

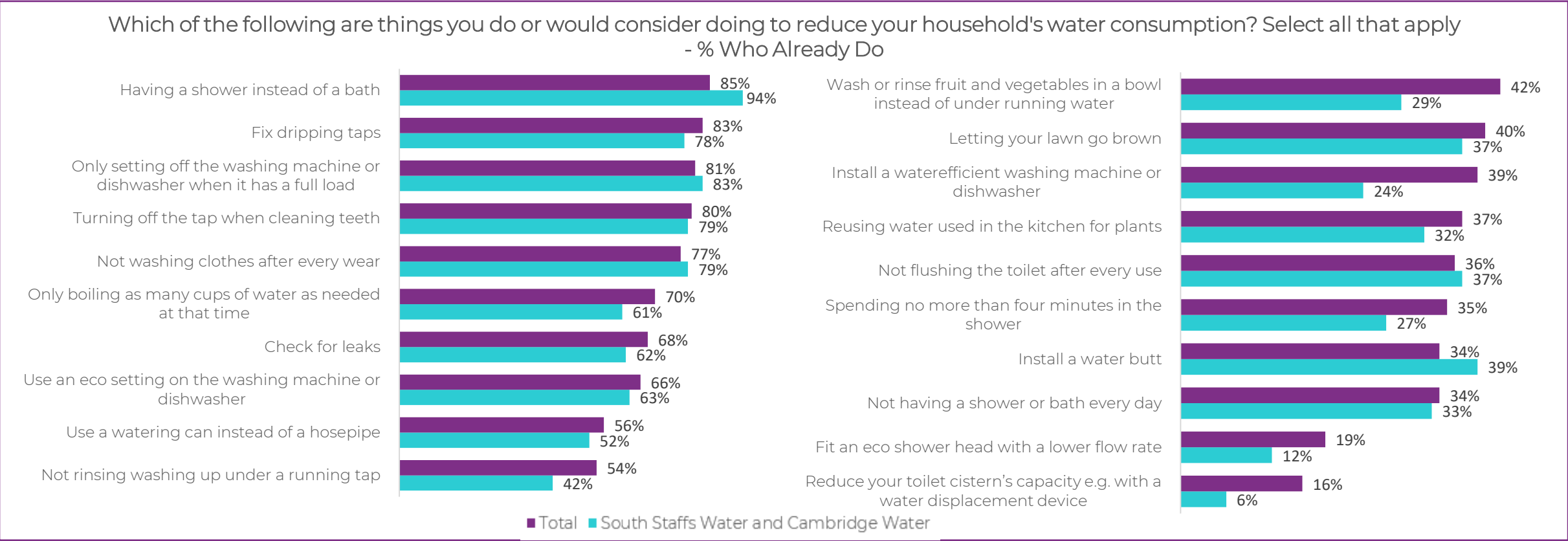
For South Staffs Water and Cambridge Water community members who have a water meter, the majority already had one when they moved into their property (slightly higher than the norm).

65% of South Staffs Water and Cambridge community members say they know that households can have a smart water meter installed, this is higher than the norm.



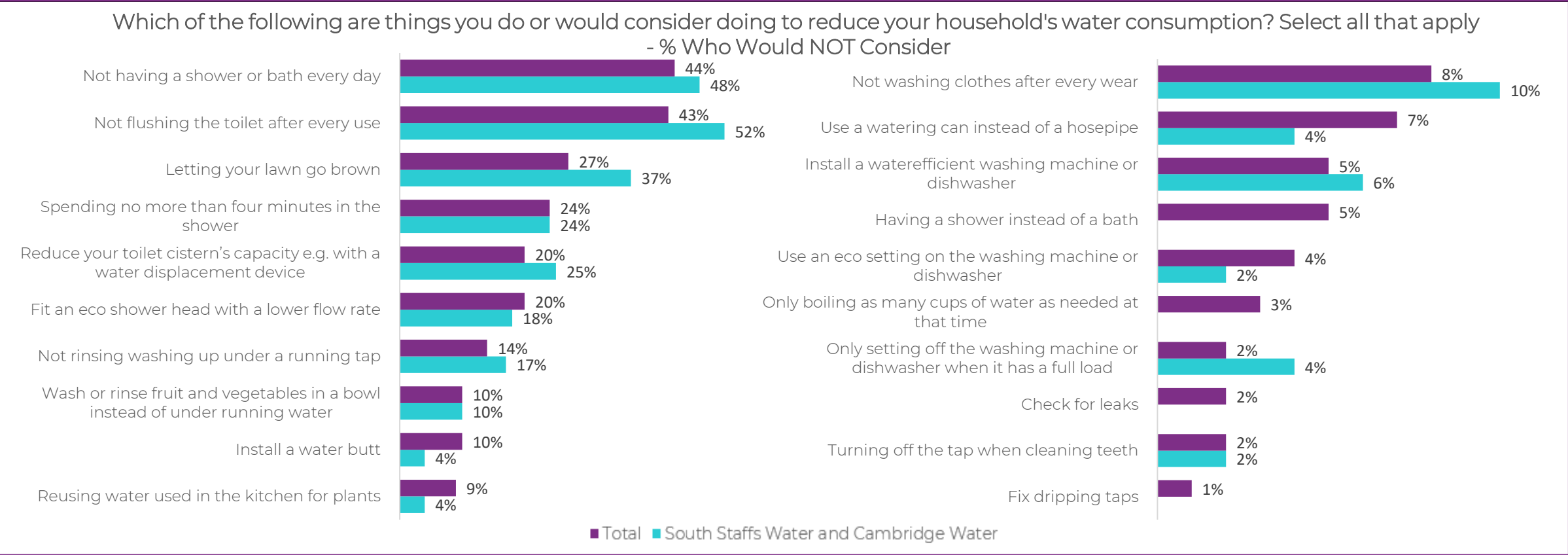
Water-Saving Measures

The top things South Staffs Water and Cambridge Water community members are doing to reduce their household's water consumption are: having a shower instead of a bath, only setting off the washing machine or dishwasher when it has a full load, turning off the tap when cleaning teeth, and not washing clothes after every wear. They are more likely than the norm to be having a shower instead of a bath.



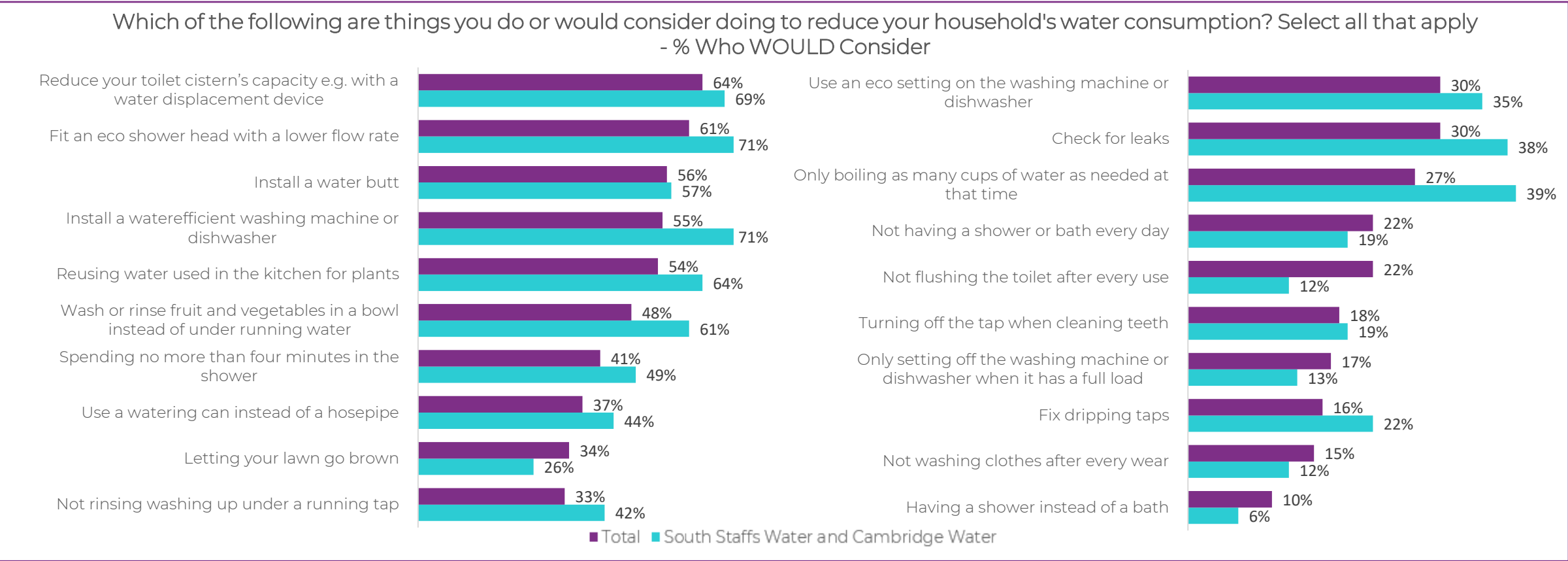
Water-Saving Measures

For South Staffs Water and Cambridge Water, the top things they would not consider doing to reduce their household's water consumption include: not flushing the toilet after every use, not having a shower or bath every day, and not letting their lawns go brown. These all have higher resistance among this group than the norm.



Water-Saving Measures

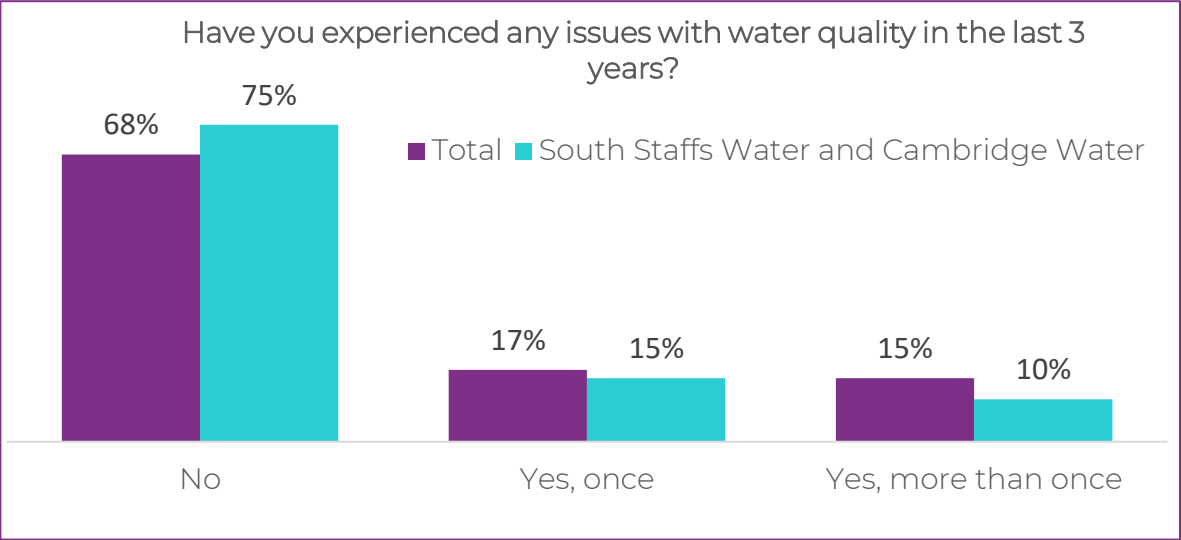
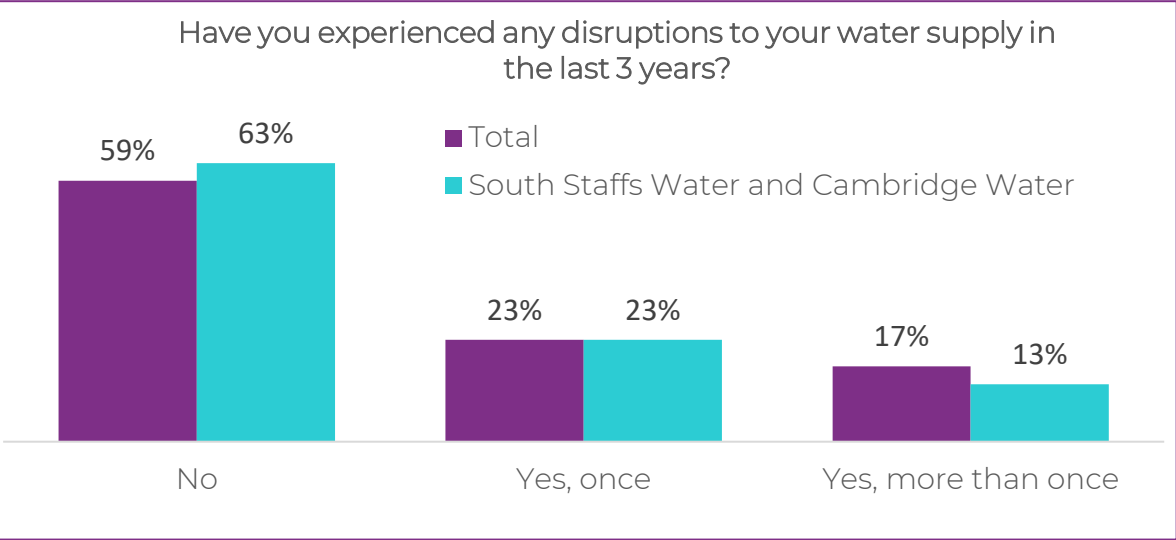
For South Staffs Water and Cambridge Water community members, the highest levels of openness are to install a water efficient washing machine or dishwasher, fit an eco shower head with a lower flow rate, and reduce their toilet cistern’s capacity.



Disruptions & Issues

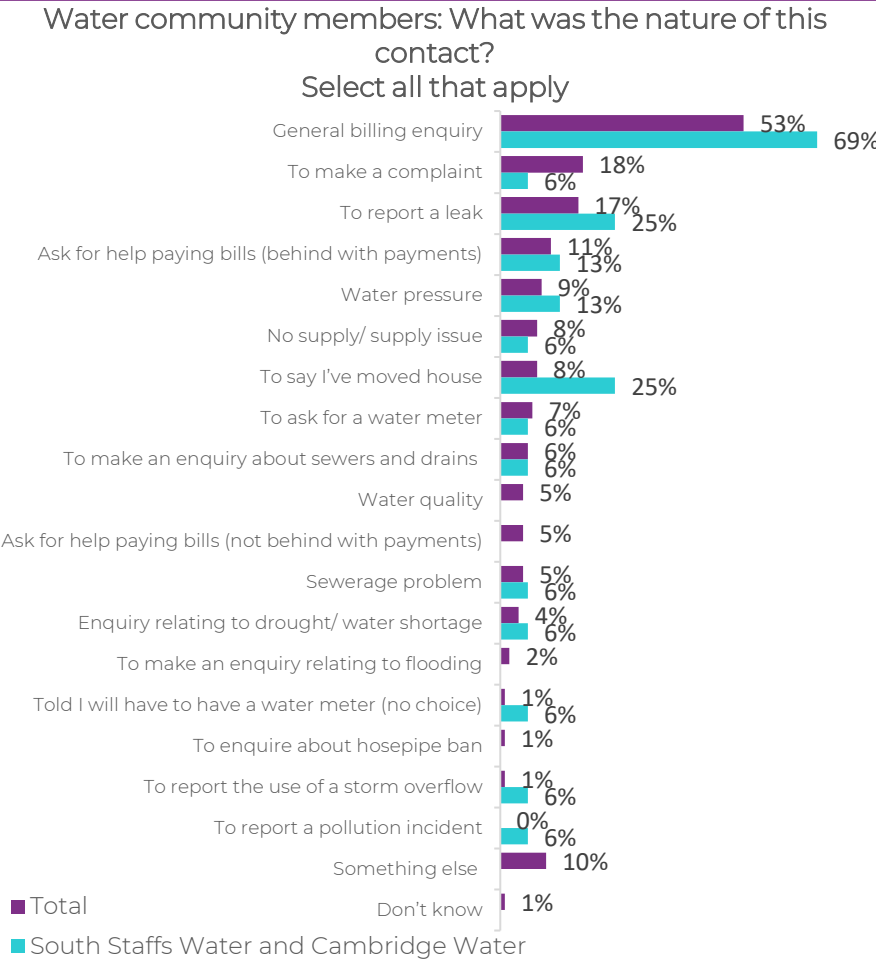
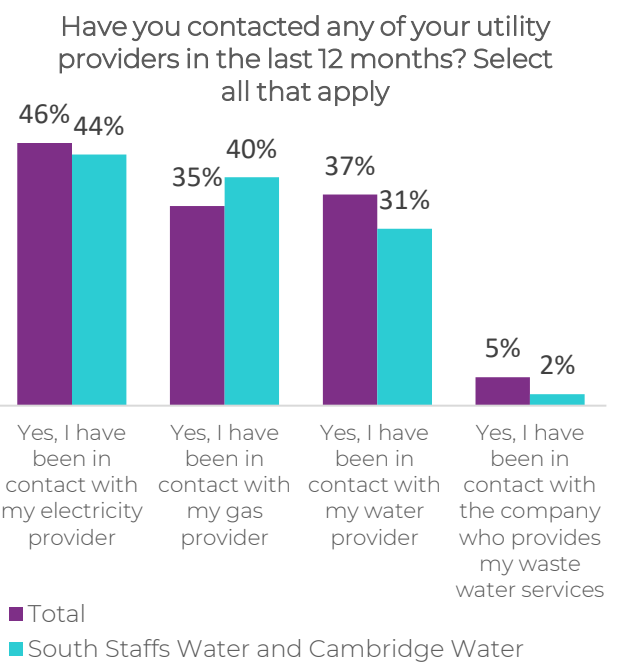
63% of South Staffs Water and Cambridge Water community members say they have not experienced supply disruptions in the last 3 years (slightly higher than the the norm). 23% have had one disruption and 13% have had a disruption more than once (slightly below the norm).

75% of South Staffs Water and Cambridge Water community members say they have had no issues with water quality in the last 3 years, higher than the norm. 15% have had one issue and 10% more than one issue.

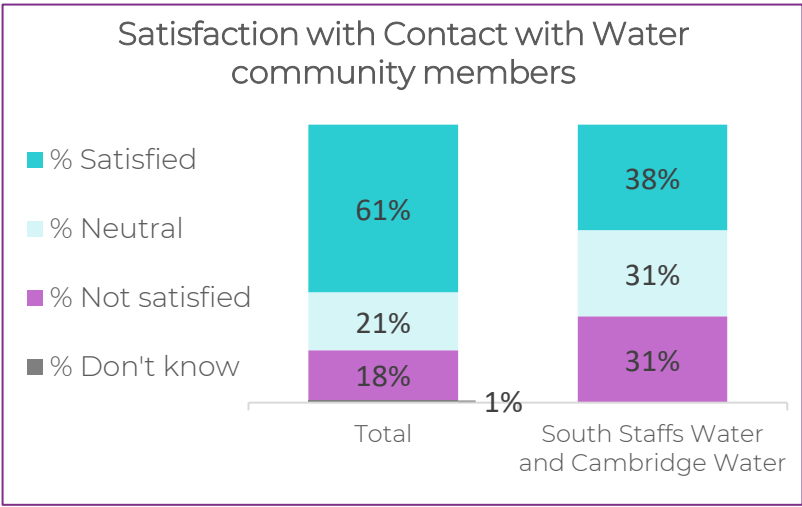


Contact with utility providers

31% of community members have been in contact with South Staffs or Cambridge Water in the last 12 months (lower than the number who have been in contact with other utility providers).



Billing enquiries, reporting a leak and house moves are the 3 main reasons for contacting South Staffs Water and Cambridge Water. In fact, 25% contacted to report a leak, higher than the norm (17%). However, only 6% contacted to make a complaint, a lot lower than the norm (18%). 38% of South Staffs Water & Cambridge Water community members who made contact were satisfied with that contact (lower than the norm at 61%).

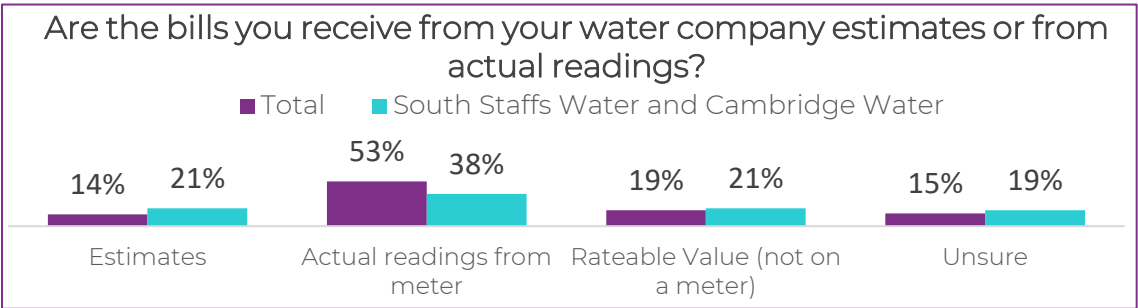


N.B. References to wastewater are not related to South Staffs Water and Cambridge Water as they are not the wastewater provider for this community.

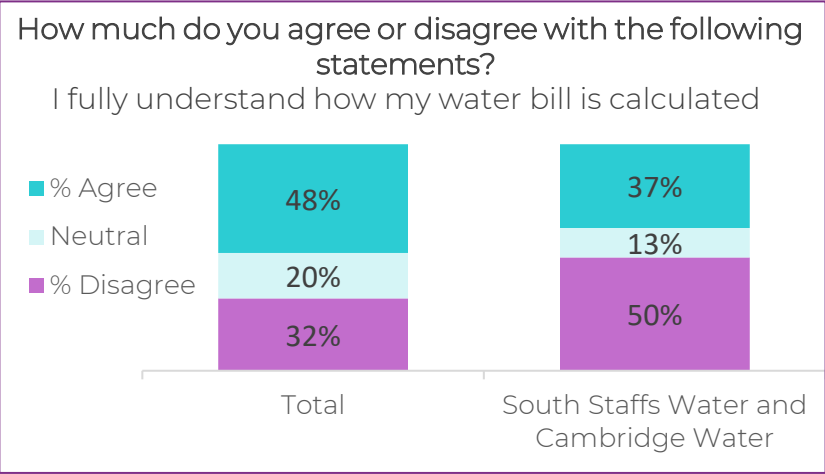
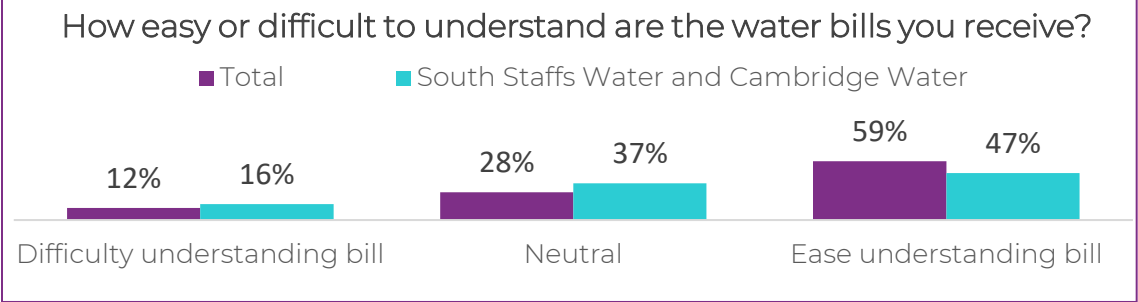
Billing



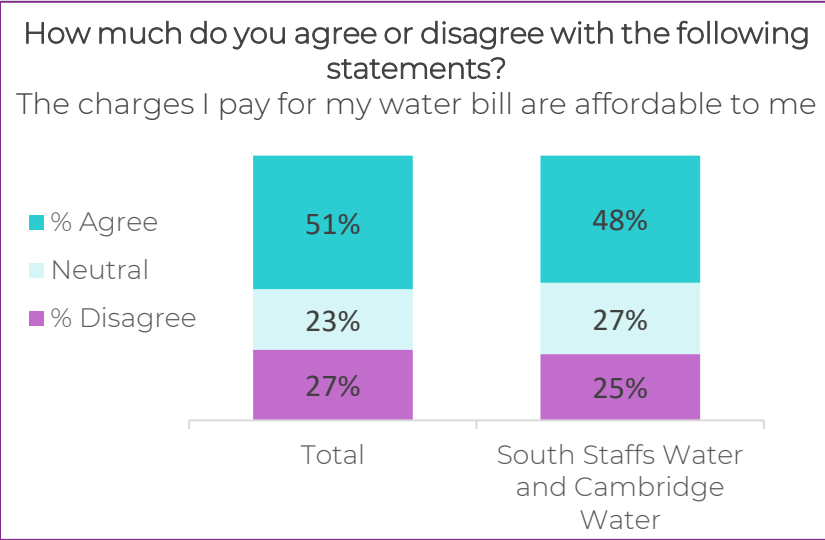
South Staffs Water and Cambridge Water community members are more likely than the norm to have their water bills based on rateable value or estimates and much less likely to have them from actual readings from their meter.



47% of South Staffs Water and Cambridge Water community members say they find it easy to understand their water bills, this is below the norm. They are slightly more likely than the norm to say they find it difficult to understand their bill.



37% of South Staffs Water and Cambridge Water community members feel they understand how their water bill is calculated (below the norm at 48%).



South Staffs Water and Cambridge Water community members are slightly less likely than the norm to agree their water bill charges are affordable.



The voice for water consumers
Llais defnyddwyr dŵr

Water Voice 'Getting to know you' Report

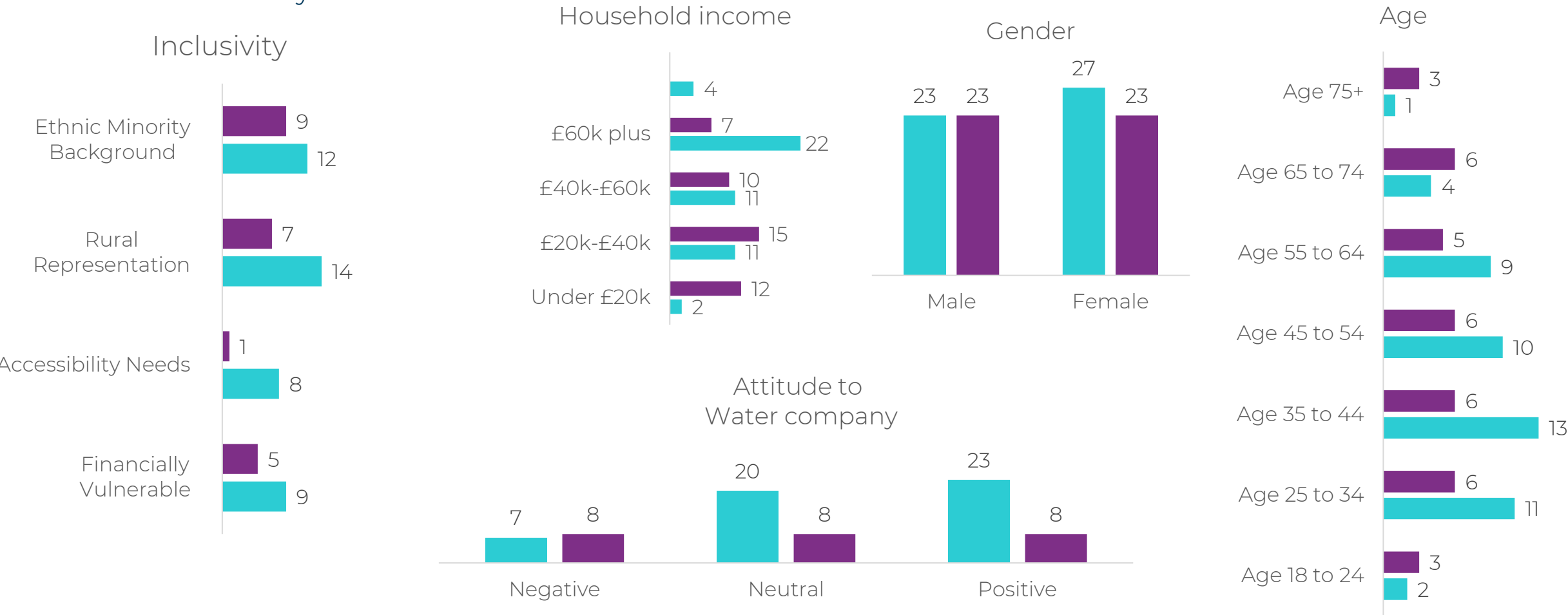
SES Water
November 2025

Delivered by Taylor McKenzie
Research & Energy Saving Trust

Version: Final copy 15.12.25

ccw.org.uk

SES Water community members: n=50



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 we were able to reach our financially vulnerable community members 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 Male, 18-24 & 65+ sample by at least 3 for next month.

SES Water

What do SES Water community members hope this community achieves?



The voice for water consumers
Llais defnyddwyr dŵr

Turning community member voices into real action and improvement.

Key themes surrounding what community members hope this community achieves:

- **Representation & being heard:** desire for water companies to listen and understand their community members, and being able to influence decision making and hold them accountable for pollution and/or poor service.
- **Improve water services, quality & customer experience:** clear, practical improvements across the service, including better water quality, improved service reliability and customer experience, and improvements to communication and responsiveness.
- **Transparency & understanding:** desire for clearer insight into how water companies operate, including their policies, environmental strategies and long-term plans.
- **Environmental sustainability & water conservation:** reduce pollution and improve waterways and increase water sustainability.

“What SES Water community members have said...”

“I think it will certainly help SES Water to make improvements, to gain feedback, to get a better understanding of its customers and their needs and will help with improvements, decision-making etc going forward. I hope it all also offers us as consumers an opportunity to express our honest opinions and provide feedback.” Female, 46, Lives with partner and child/children

“Challenge the directors of these water boards and ask their plans for the next 20-30 years.” Male, 36, Lives with partner and child/children

“A voice for customers.” Female, 51, Lives with child/children

“Hopefully put our issues in front of all water companies.” Female, 57, Lives with partner



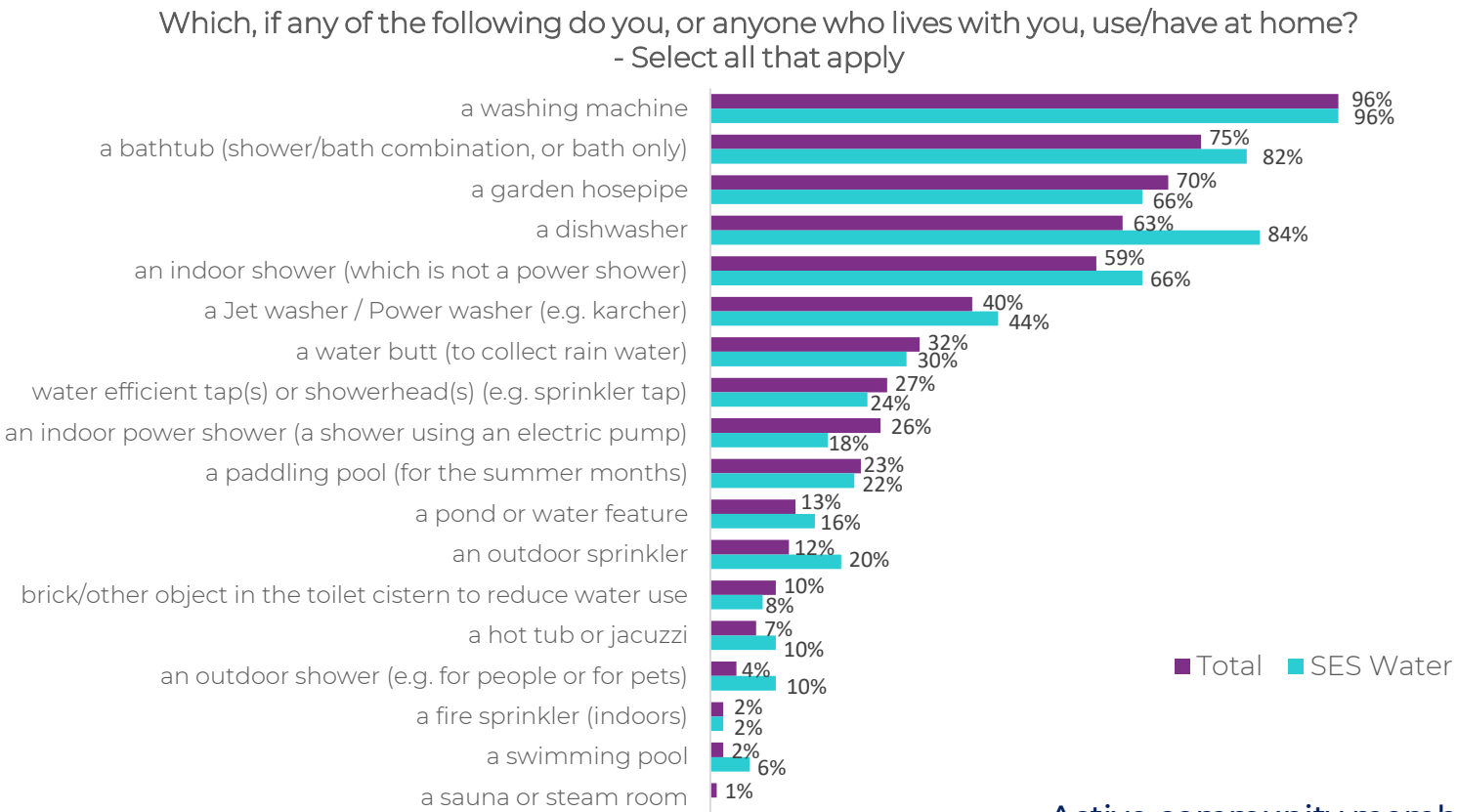
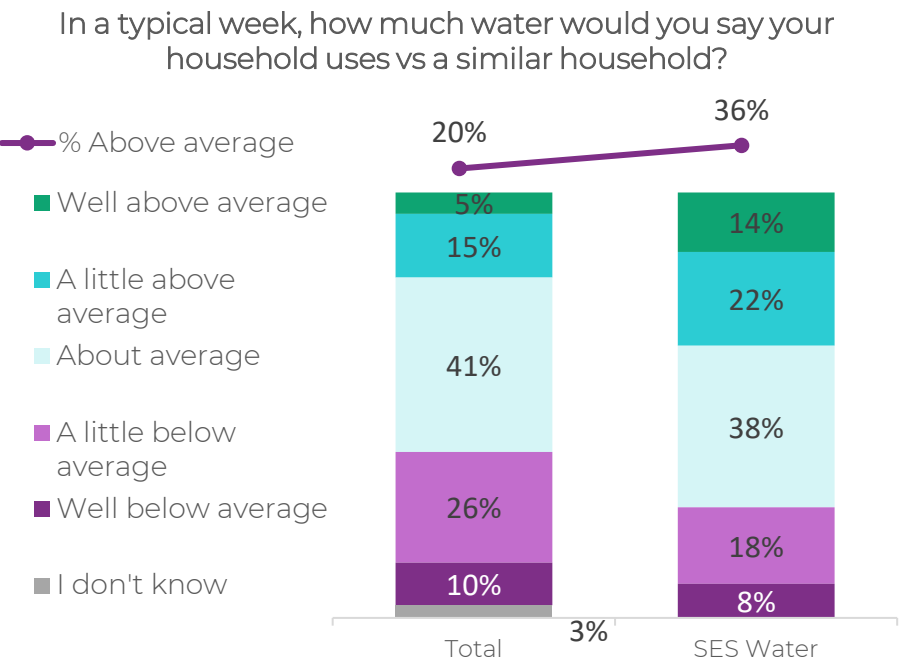
SES Water community members want the community to ensure meaningful engagement between community members and water companies, driving improvements in service quality, communication, environmental performance, and long-term planning. They expect transparency, accountability, and a genuine platform where community members' voices shape decisions, build trust, and contribute to a more sustainable and customer-focused water system.

Active community members
Total Base Size: 755
SES Water Base Size: 50

Water Use at Home

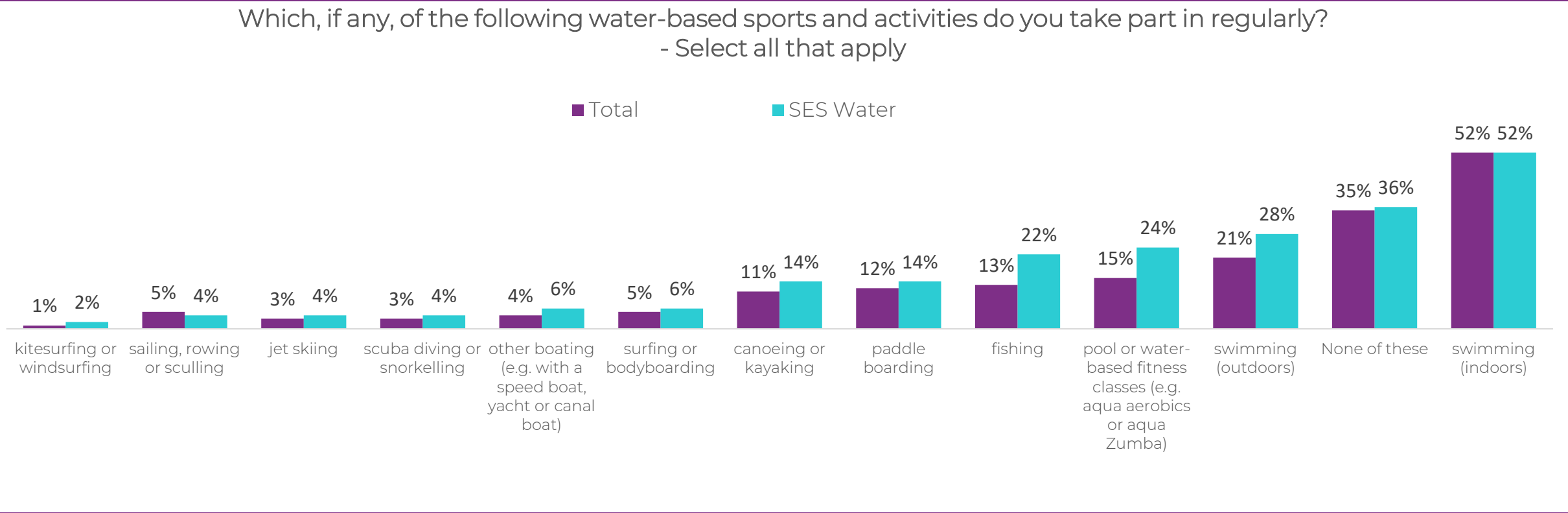
A significantly higher proportion of SES community members say that they use an above the norm amount of water compared to similar sized households.

A higher number of the SES Water Community have a bathtub and more also have an indoor shower compared to the Total findings. There is also a higher level of ownership for this panel on outdoor showers, ponds or water features, swimming pools, outdoor sprinklers, hot tubs or jacuzzi and jet washers.



Water Locations & Activities

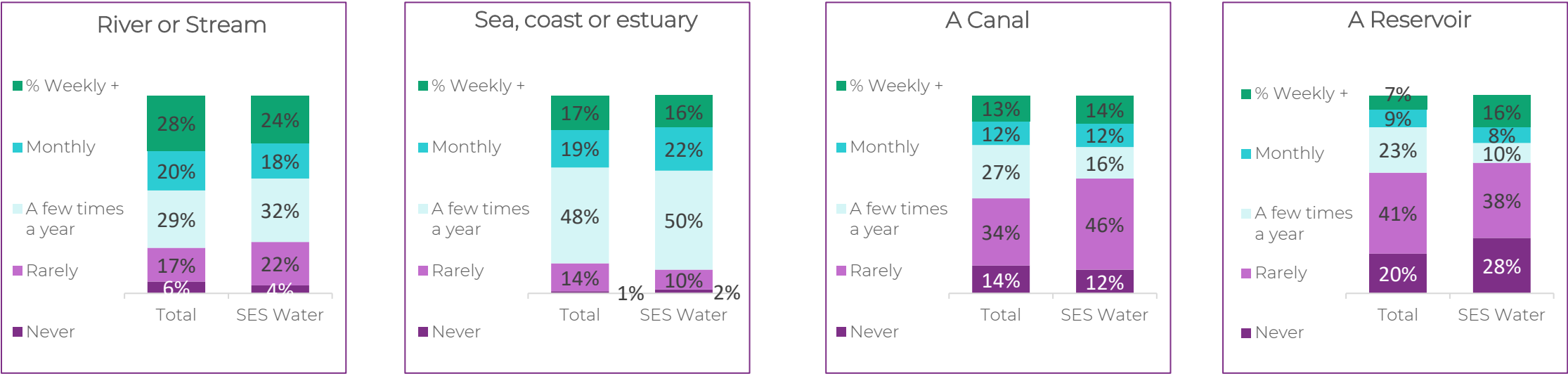
Swimming (indoors) is by far the most common water-based activity in general and this is also the case for the SES Water community. SES members are more likely than the norm to take part in outdoor water-based activities with higher participation in outdoor swimming, fishing, paddleboarding and other boating. A higher proportion of the SES Community also take part in pool or water-based fitness classes.



Water Locations & Activities

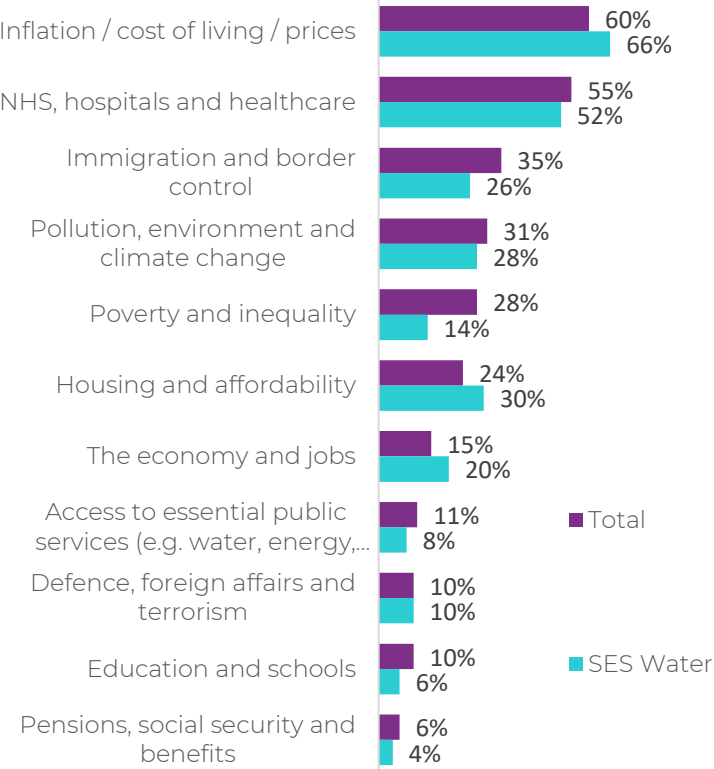
A slightly higher proportion of SES Water community members rarely visit rivers, streams or canals compared to the norm, but this community is more likely than the norm to visit a reservoir at least weekly and the sea, coast or estuary monthly or a few times a year.

How often, if at all, do you spend time by or on the water at any of these places shown below?

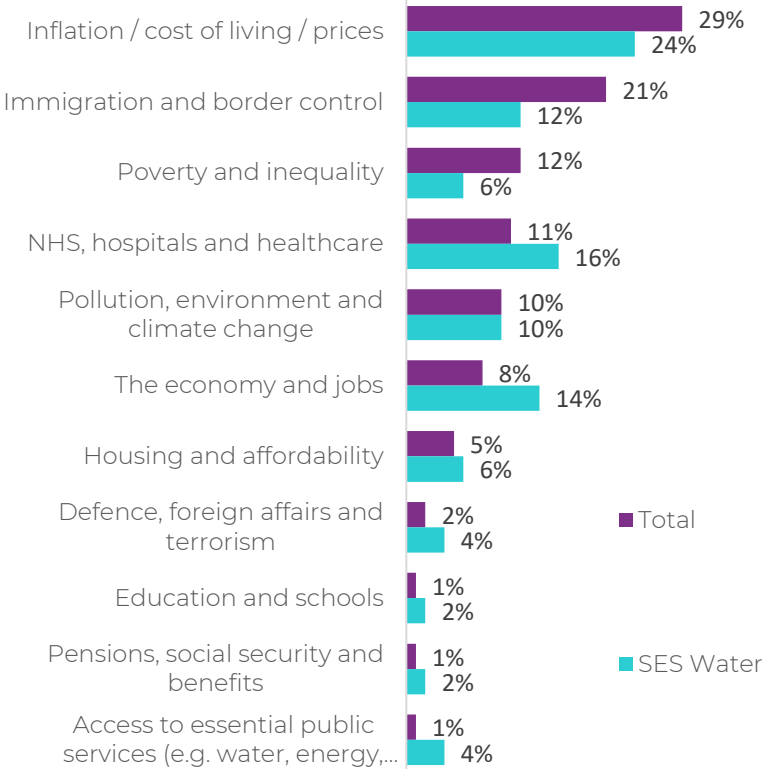


UK Issues

All Issues Facing the UK – Select up to two



ONE Main issue Facing the UK



The cost of living, inflation and prices is viewed by more SES Water community members as an issue but by a fewer number than the norm as the single biggest issue facing the UK today.

The SES Water community is more likely than the norm to view housing and affordability as one of the issues facing the UK today and to view the economy and jobs, as well as the NHS, hospitals and healthcare as the single main issue facing the UK.

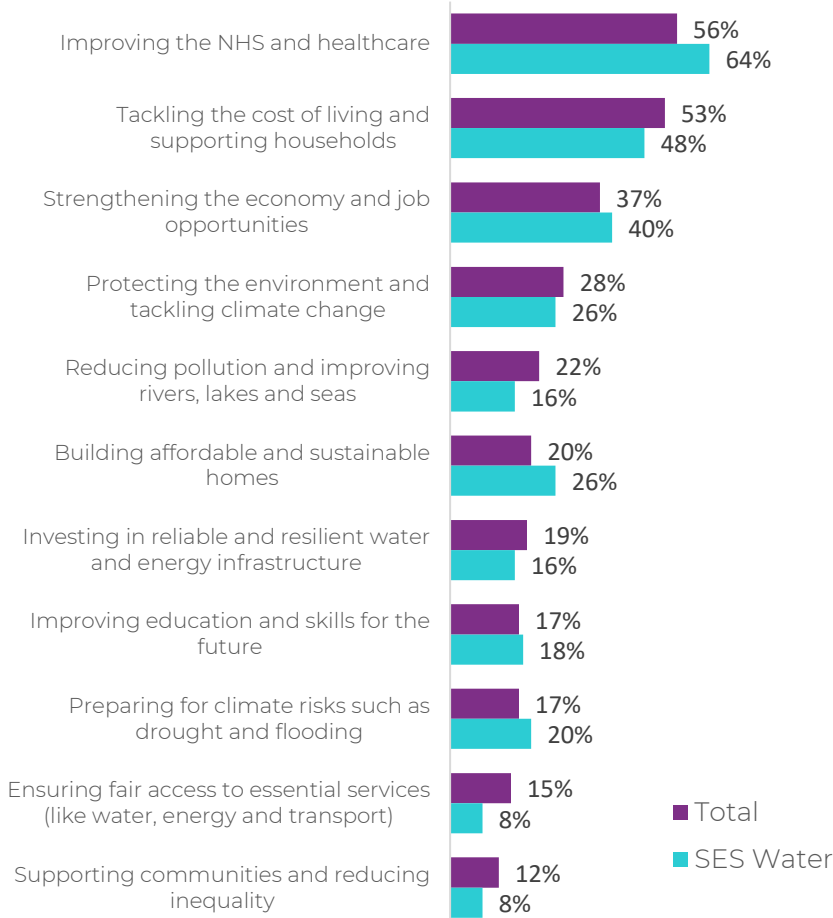
UK Priorities

In total, the most commonly mentioned priority is improving the NHS and healthcare with tackling the cost of living and supporting households the second most commonly mentioned.

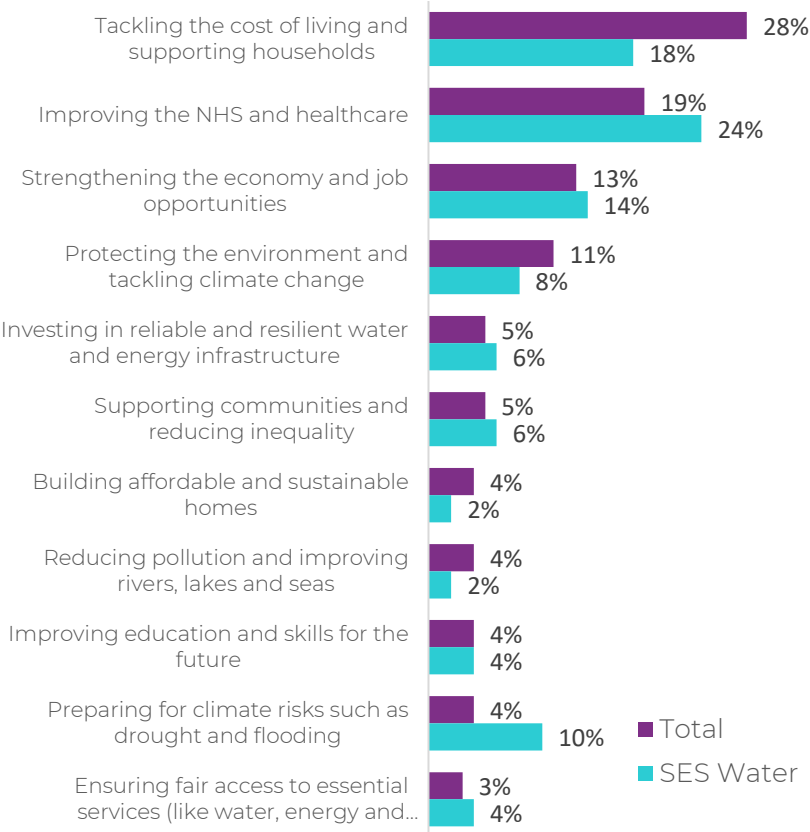
SES Water Community members are even more likely than the norm to say improving the NHS and healthcare is one of the priorities and they are also more likely to say it should be the ONE top National priority.

Slightly fewer say tackling the cost of living is a priority. Instead, this community is more likely to note building affordable and sustainable homes as a priority.

Priorities for Government and Public Investment -
Select up to two



ONE Top National Priority



Environment Concerns

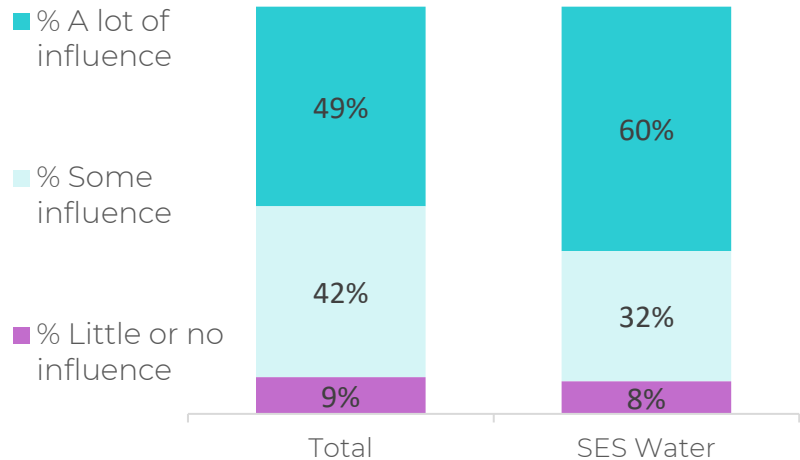
Including Saving Water & Energy



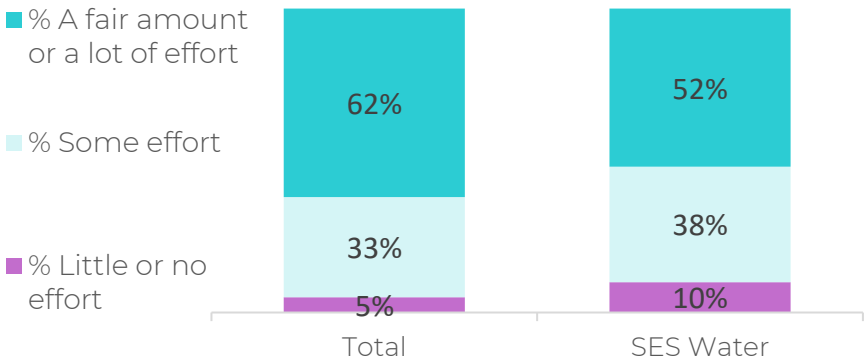
The voice for water consumers
Llais defnyddwyr dŵr

SES Water community members are much more likely to say that concern for the environment has a lot of influence on their everyday decisions.

How much does concern for the environment influence your everyday decisions — for example, around energy use, travel, or shopping?

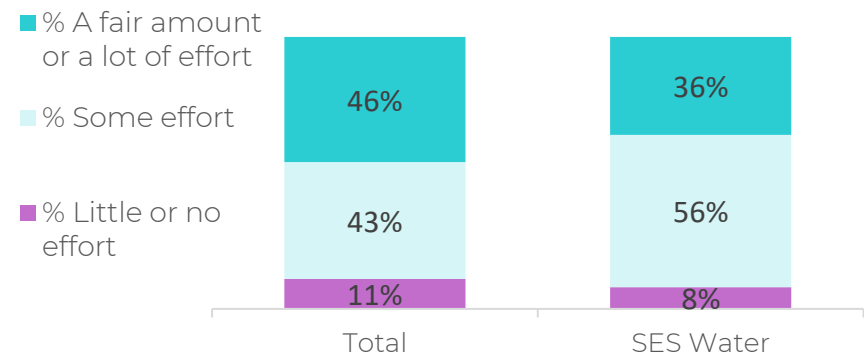


How much effort does your household make at home to save ENERGY?



52% of SES Water community members (lower than the norm), say they make a fair amount or a great deal of effort to save energy.

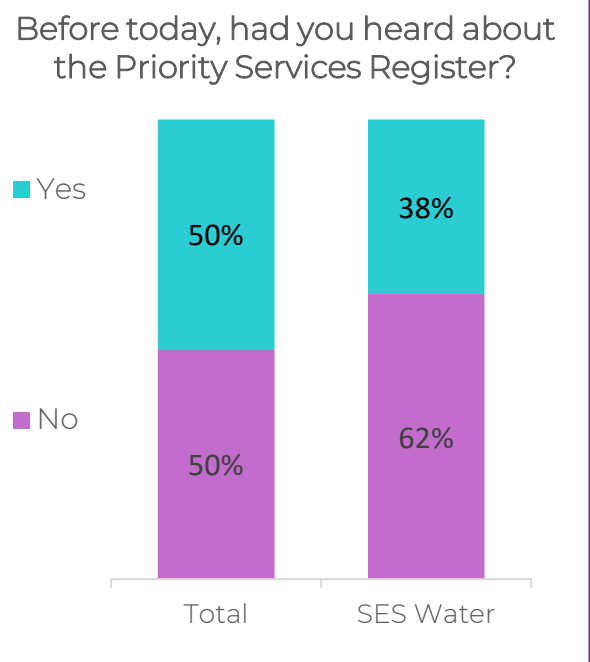
How much effort does your household make at home to save WATER?



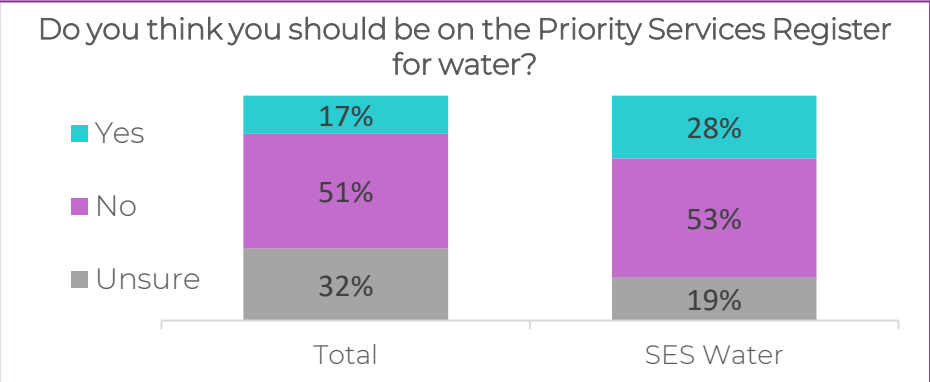
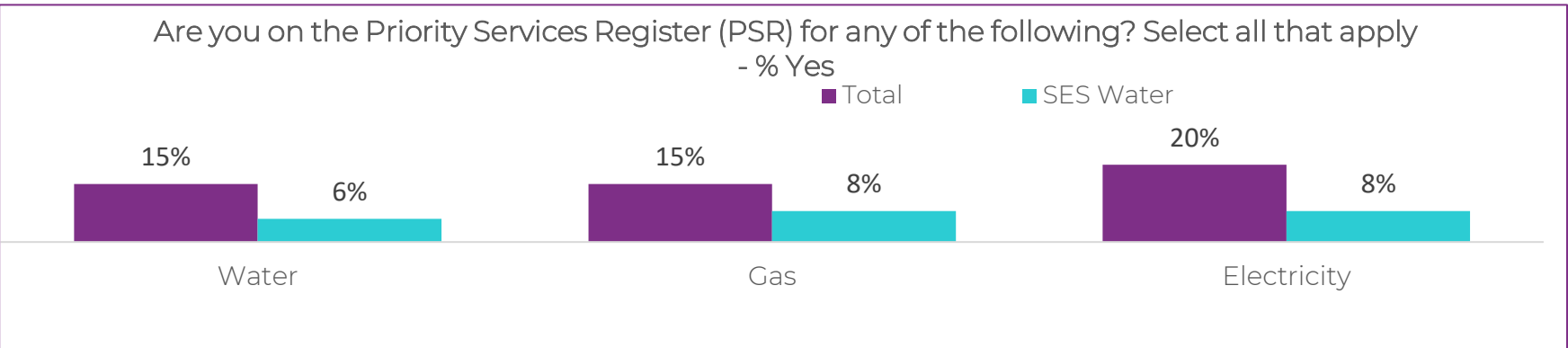
The number of community members making a great deal or a fair amount of effort to save water is lower in general compared to energy – 36% of the SES Water community say they are making the effort (lower than the norm and lower than the number saying they are making effort to save energy).

Priority Services Register

Overall, 38% of the SES Water community members say they have heard of the Priority Services Register, well below the norm at 50%.



A lower proportion of SES Water community members say they are on the Priority Services Register for water, gas and/or electricity compared to the norm.



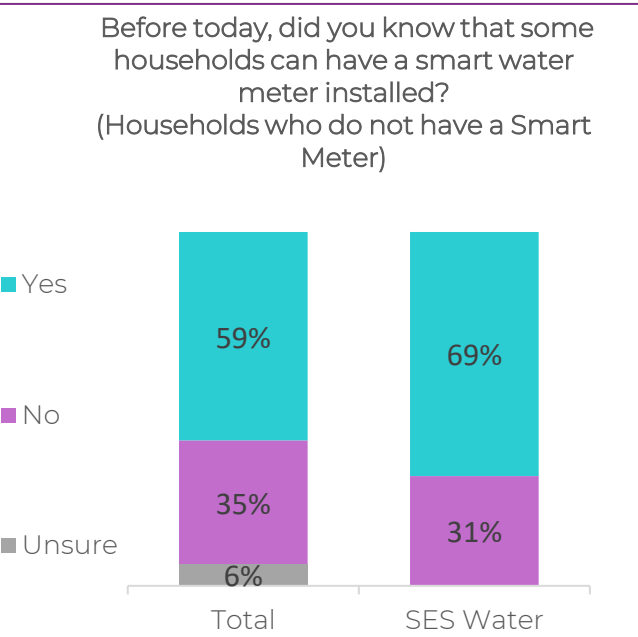
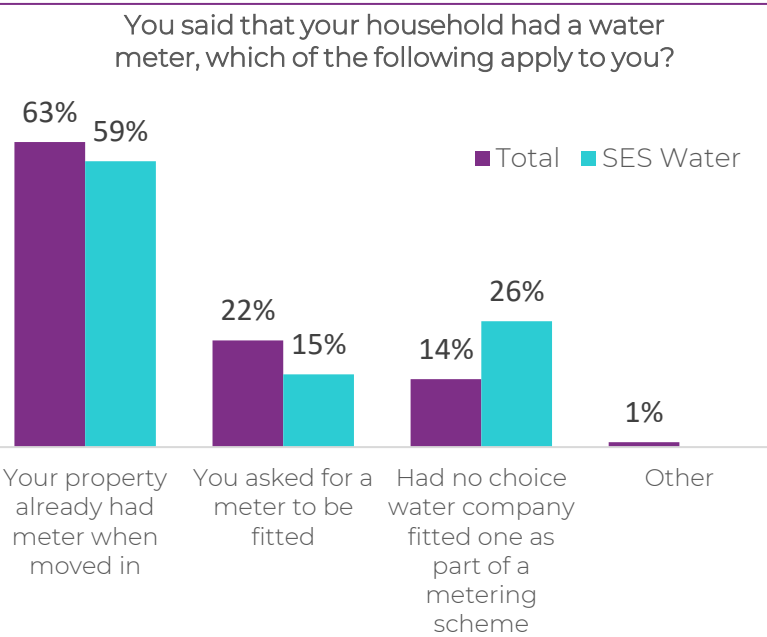
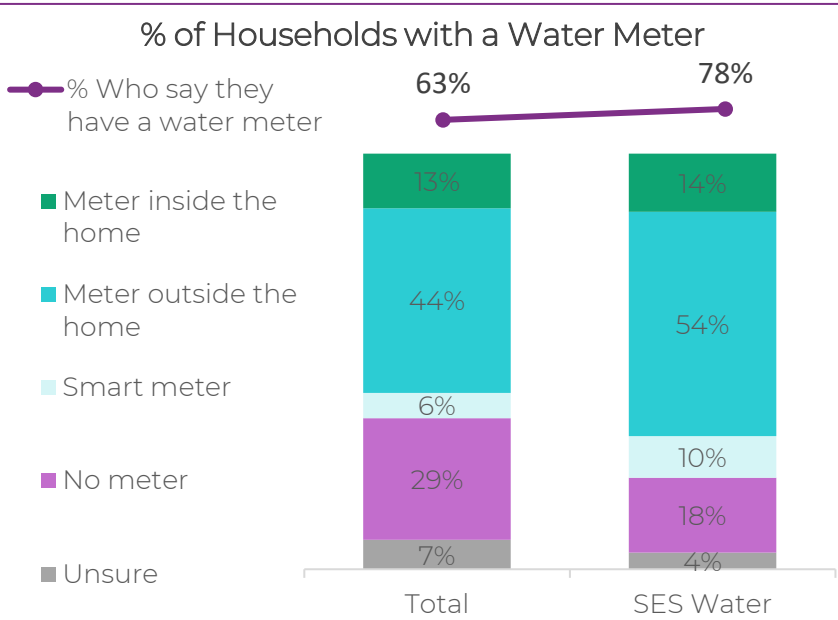
For those not currently on the Priority Services Register for water, 28% of SES Water community members think they should be on it, compared to the norm at 17%.

Water Meters

SES Water community members are more likely than the norm to have a water meter, driven by a much higher number with a meter outside the home. A slightly higher number of SES Water community members have a smart meter.

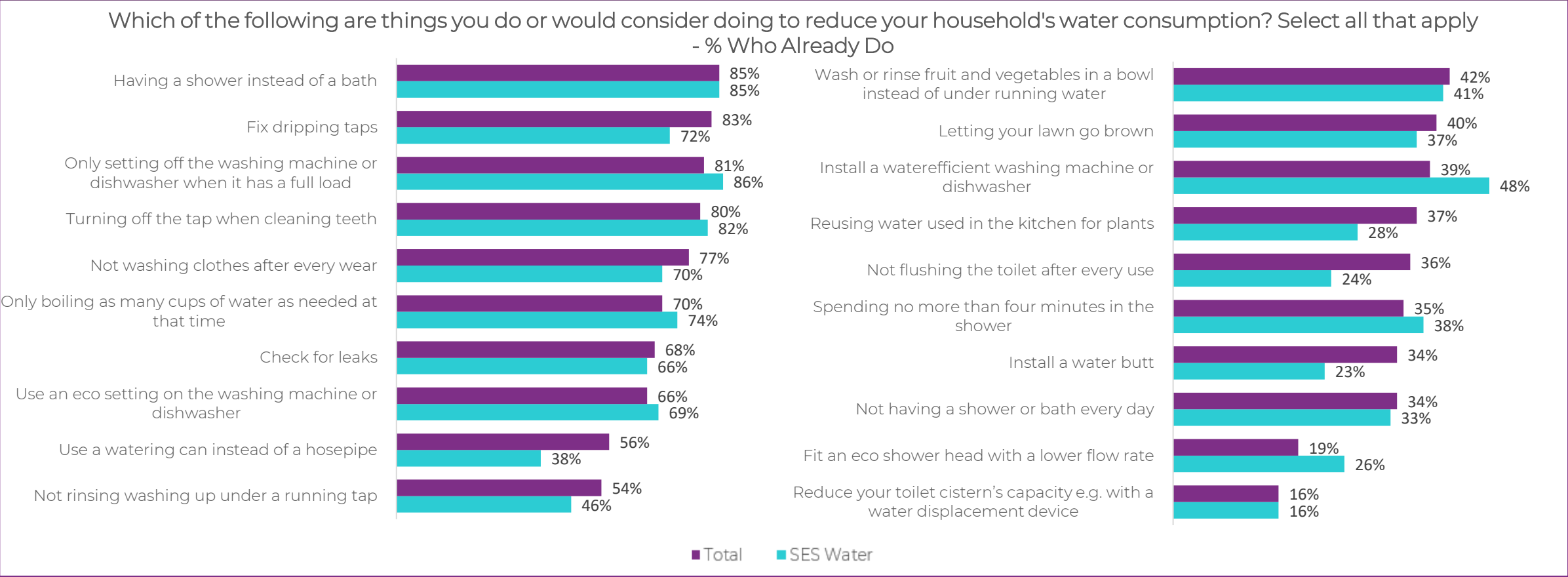
For SES Water community members who have a water meter, a much higher proportion than the norm say they had no choice and that the meter was fitted as part of a metering scheme.

69% of SES Water community members (higher than the norm) say they know that households can have a smart water meter installed.



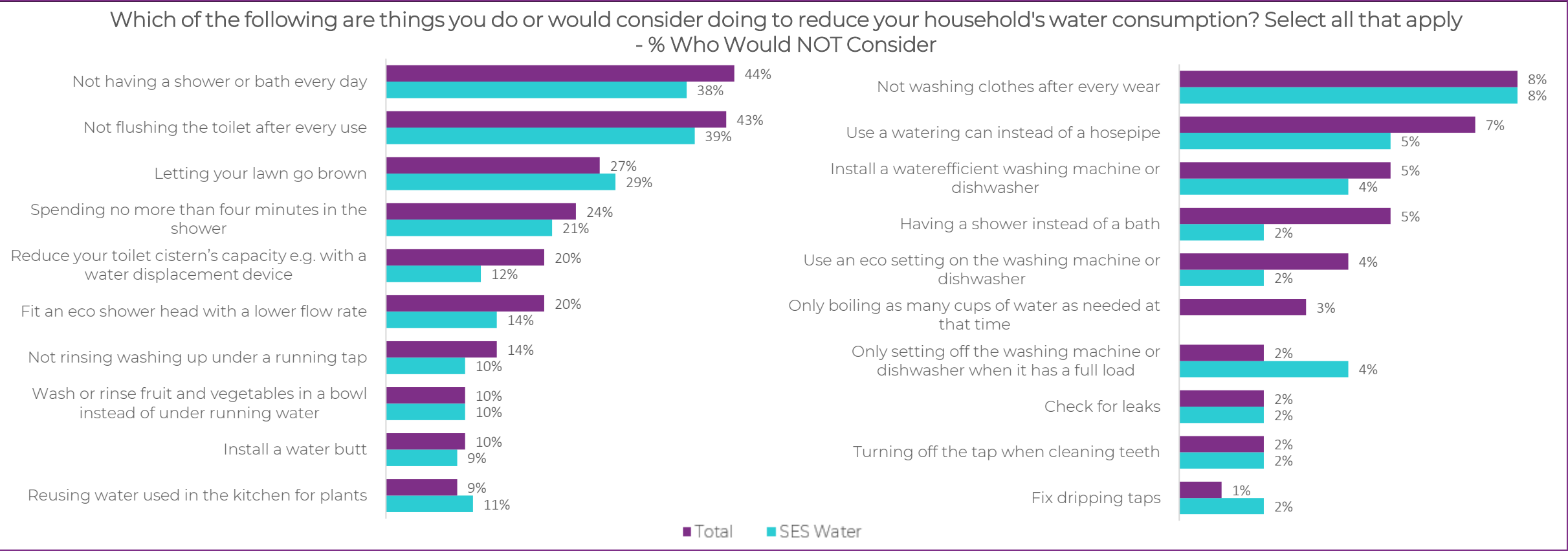
Water-Saving Measures

The majority of SES Water community members (a higher number compared to the norm) say they are only setting off the washing machine and dishwasher with a full load (and using eco settings). A higher proportion than the norm are also installing a water-efficient washing machine or dishwasher. Fewer of this community than the norm are fixing dripping taps.



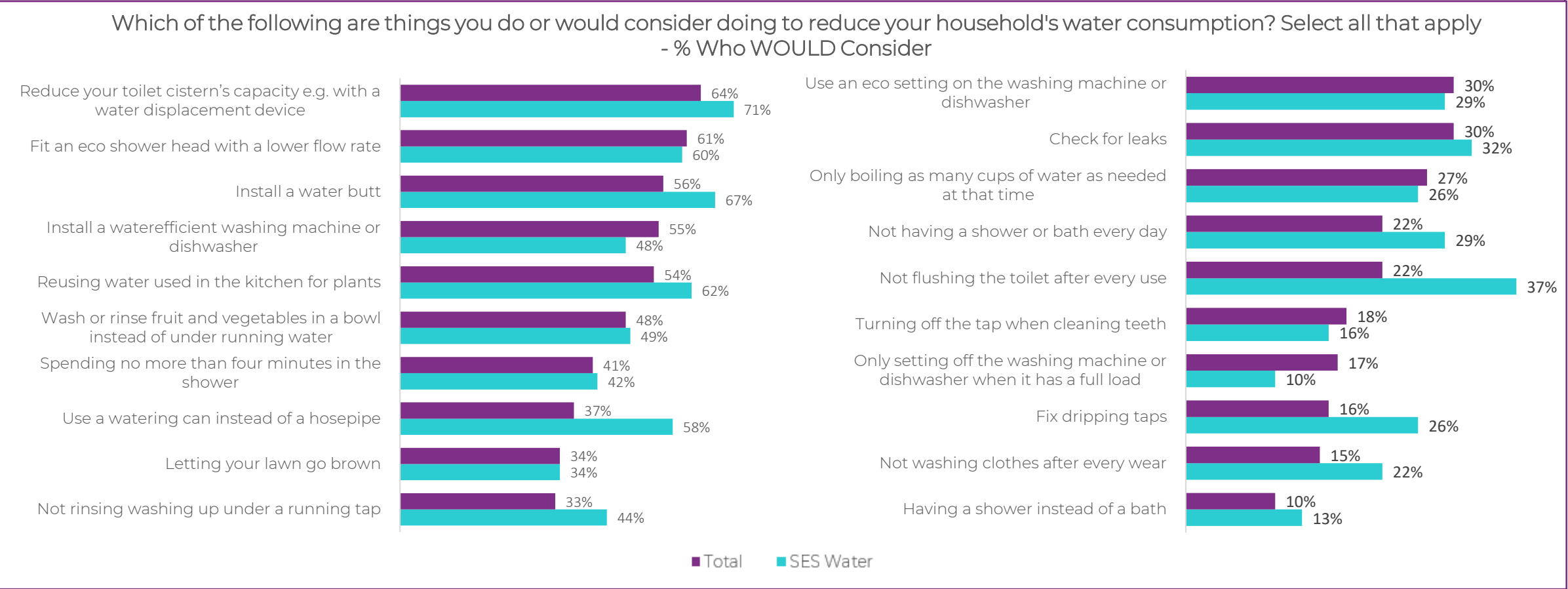
Water-Saving Measures

For SES Water community members, the water-saving measures generating the greatest resistance are the same as they are for the norm, namely not having a bath/shower every day and not flushing the toilet after every use. However, this community is also less likely to consider letting their lawn go brown.



Water-Saving Measures

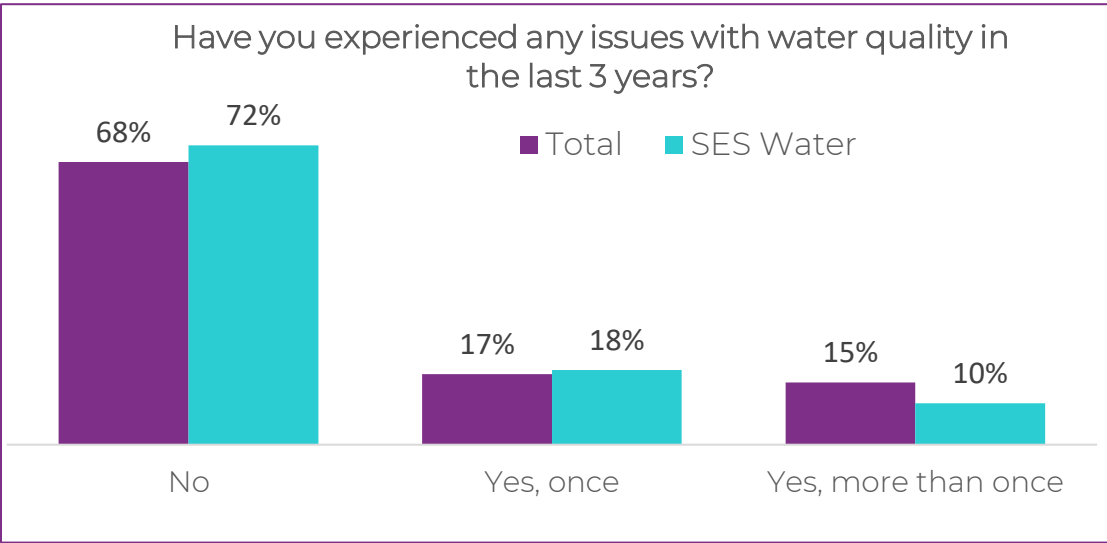
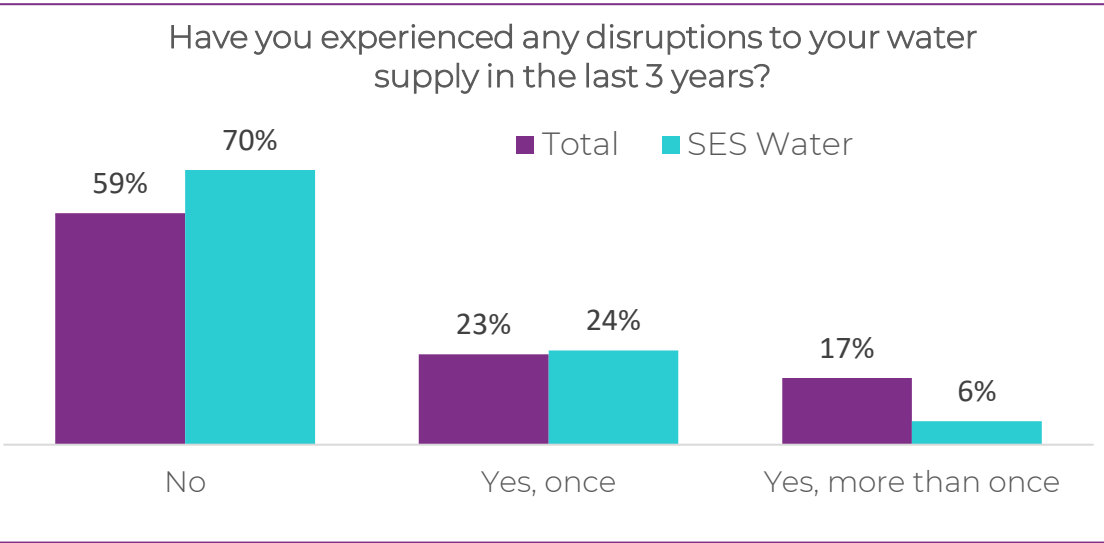
For SES Water community members, the highest levels of openness are to reducing the toilet cistern's capacity, installing a water butt, reusing kitchen water for plants, and using a watering can instead of a hosepipe.



Disruptions & Issues

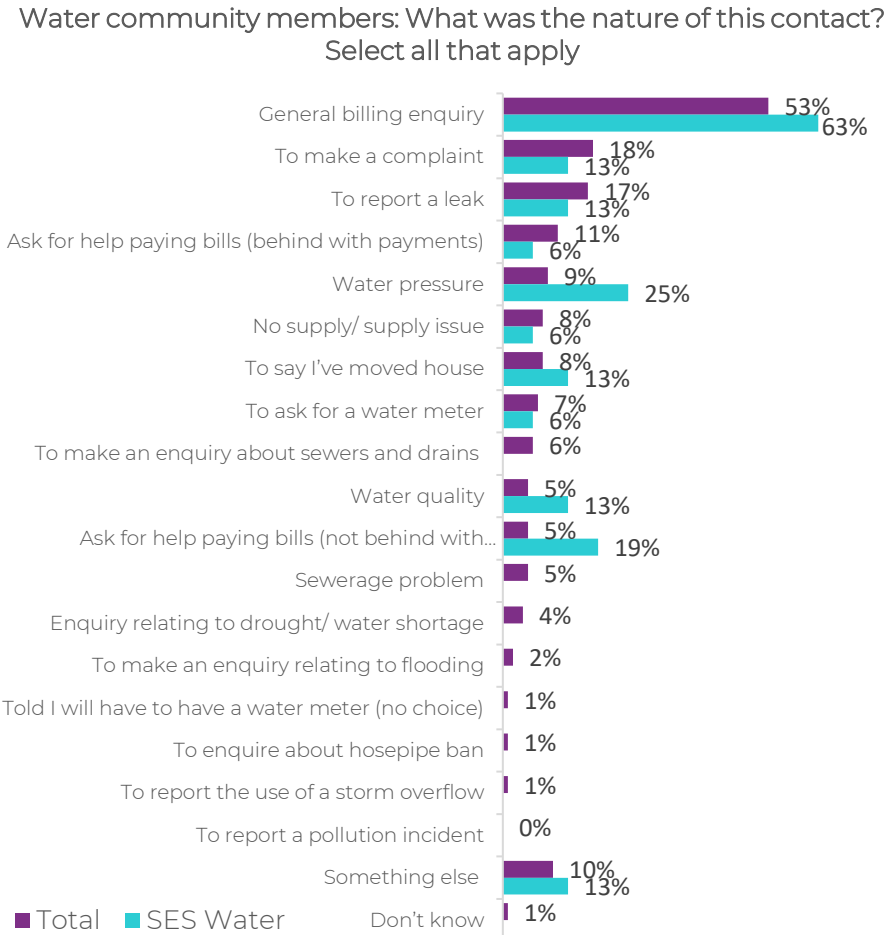
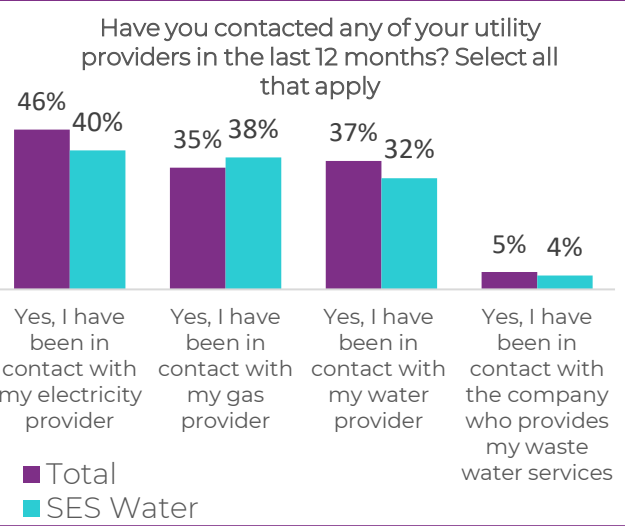
70% of SES Water community members say they have not experienced supply disruptions in the last 3 years (higher than the norm at 59%). 24% have had one disruption (vs. the norm at 23%) and 6% have had a disruption more than once (well below the norm at 17%).

72% of SES Water community members say they have had no issues with water quality in the last 3 years, higher than the norm at 68%. 18% have had one issue (vs. the norm at 17%) and 10% more than one issue (vs. the norm at 15%).



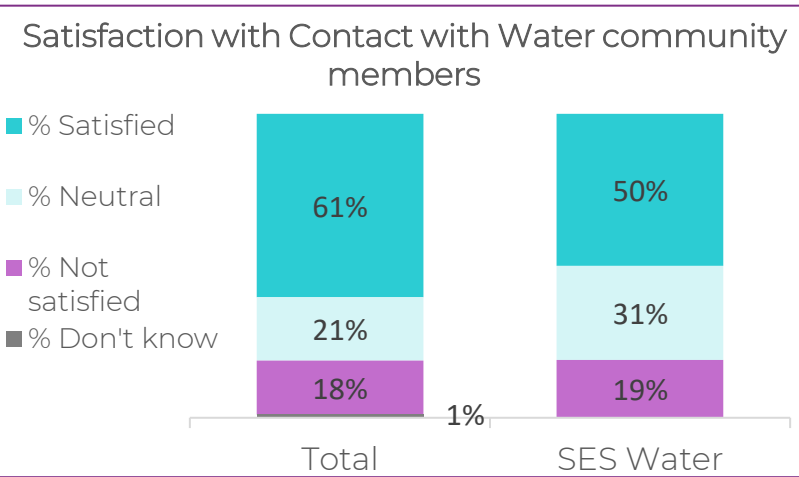
Contact with utility providers

32% of SES Water community members have been in contact with SES Water in the last 12 months, lower than the norm at 37%. This is also lower than the number of SES community members who have been in contact with their electricity and/or gas community members.



Billing enquiries, contact regarding water pressure, and to ask for help in paying bills are the 3 main reasons for contacting SES Water (and all 3 of these are more common than for the norm). SES Water community members are less likely than the norm to have made a complaint or reported a leak.

50% of SES Water community members who made contact were satisfied with that contact (below the norm at 61%).



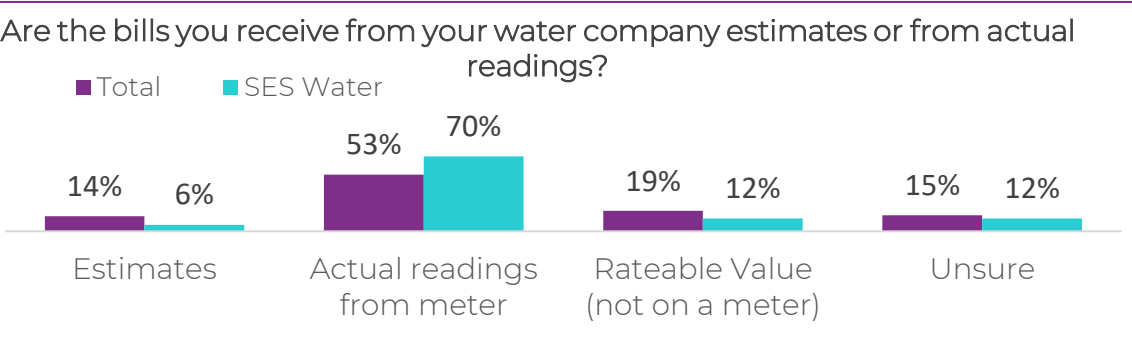
N.B. References to wastewater are not related to SES as they are not the wastewater provider for this community.

Billing

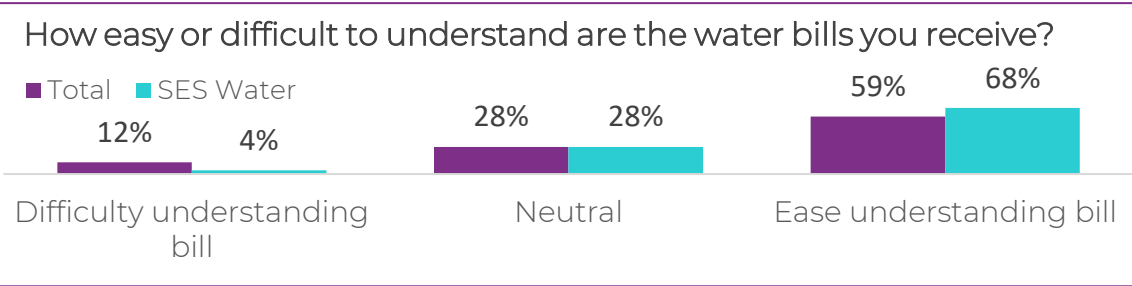


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SES Water community members are more likely than the norm to have their water bills based on actual meter readings and much less likely to have rateable value or estimates as the base.

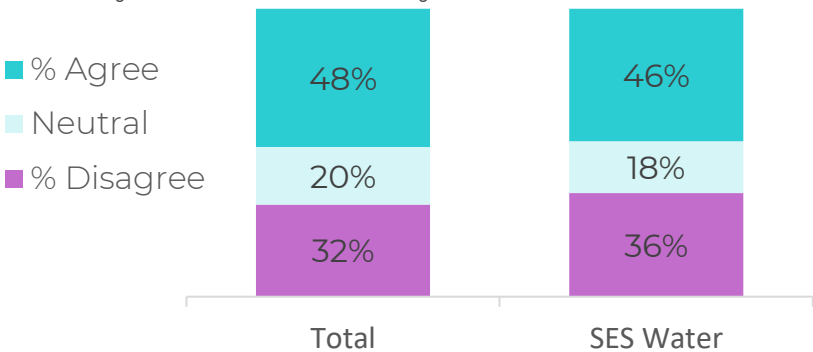


68% of SES Water community members say they find it easy to understand their water bills (above the norm at 59%).



How much do you agree or disagree with the following statements?

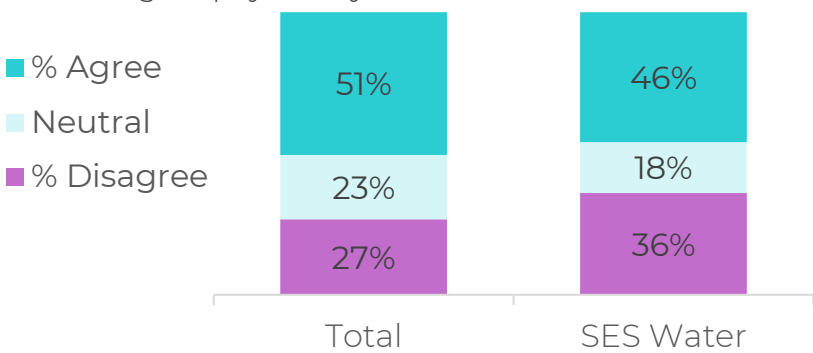
I fully understand how my water bill is calculated



46% of SES Water community members feel they understand how their water bill is calculated, marginally below the norm at 48%.

How much do you agree or disagree with the following statements?

The charges I pay for my water bill are affordable to me



SES Water community members are slightly less likely than the norm to agree that their water bill charges are affordable and a higher number than the norm disagree.

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