



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

# Contents Page



The voice for water consumers  
Llais defnyddwyr dŵr

[!\[\]\(339a16584d5da0f0a3ca4e9ec17bf6a1\_img.jpg\) Our Research Approach: Objectives & Methodology](#)

Page 4

[!\[\]\(de95854c7ee024cfadc48187bbb781b2\_img.jpg\) Water Voice Community: Sample](#)

Page 10

[!\[\]\(6059a5aa8b4ca7bb793408023d6c6e42\_img.jpg\) Water Voice Community: Executive Summary](#)

Page 11

[!\[\]\(6a9b39b98eb945faa14c645ec99e4eaa\_img.jpg\) Core Themes: Community Insights](#)

Page 12

## Full 'Barometer & Spotlight findings per water company:

[!\[\]\(f60b7a900783ac3fd531bfd9c111be6d\_img.jpg\) Anglian Water Report](#)

Page 13

[!\[\]\(235bfe13ebf007ce2eea9e689707fac7\_img.jpg\) Northumbrian Water and Essex & Suffolk Water report](#)

Page 21

[!\[\]\(83bbbd261710c59db0214aa27b2edc0d\_img.jpg\) Severn Trent Water Report](#)

Page 31

[!\[\]\(291e070cef6c4d5e78fefe4696ef53be\_img.jpg\) South West Water incl. Bristol Water and Bournemouth Water Report](#)

Page 39

[!\[\]\(f507db636256ac11a5525ef93ec6b8d7\_img.jpg\) Southern Water Report](#)

Page 49

[!\[\]\(066cb4a00c9d9f40edb6f87372ec6f08\_img.jpg\) Thames Water Report](#)

Page 57

[!\[\]\(b9742ff0bb3da904abeeee81c2bcb456\_img.jpg\) United Utilities Report](#)

Page 65

[!\[\]\(b78e2d0769ad682766c36e077fde3d60\_img.jpg\) Wessex Water Report](#)

Page 73

[!\[\]\(eff7520f80aa06fb7298beb68337d76d\_img.jpg\) Yorkshire Water Report](#)

Page 81

[!\[\]\(6cb062c5b0ba577de9349a509584b7fe\_img.jpg\) Dŵr Cymru Report](#)

Page 89

[!\[\]\(6cbc1ccb83d054cfccdd556bf6cbdae8\_img.jpg\) Hafren Dyfrdwy Report](#)

Page 97

[!\[\]\(c878613cf7ded944bfc7a2ca9c203d94\_img.jpg\) Affinity Water Report](#)

Page 105

[!\[\]\(98c78cd2a2ac28d8c69439852e303d4f\_img.jpg\) Portsmouth Water Report](#)

Page 113

[!\[\]\(b41b71011a8b855bc1d1430aed0f7da1\_img.jpg\) South East Water Report](#)

Page 121

[!\[\]\(05b881c6f4fcc2aa54d489142a16b2bd\_img.jpg\) South Staffs Water and Cambridge Water Report](#)

Page 129

[!\[\]\(eff5bff3ad0658f0dd65a8f36fc37dd1\_img.jpg\) SES Water Report](#)

Page 139



The voice for water consumers  
Llais defnyddwyr dŵr

# Our Research Approach





# Objectives



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



- The **Barometer** tracks overall sentiment and trust, helping CCW and water companies monitor changes in performance and customer priorities over time.



- The **Spotlight** explores a specific issue, focused on service experience to environmental performance, providing richer understanding of customers' views and expectations.

Every month we will focus on one or two specific topics. This month we are going to be focusing on **Drought Management**.

## Key objectives:

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

# Methodology

---



Findings in this report are drawn from members of the Water Voice Community, a diverse group of around 800 customers representing all water company regions across England and Wales.

Insights are gathered through two complementary approaches:

- **Barometer surveys** – a recurring monthly survey that tracks evolving sentiment and customer confidence.
  - **Spotlight surveys** – a monthly thematic focused survey exploring a range of key issues.
- 
- ✓ All responses are analysed to identify recurring themes, emerging concerns, and opportunities for improvement.
  - ✓ Findings are presented at **water company level** where differences in customer insights are meaningful and actionable.



# Understanding our reporting approach

---



## Why we use charts in our reporting

- Our communities are designed to provide structured, directional insight, drawing on around 50 engaged members per water company.
- Charts are used to summarise and communicate patterns clearly, not to imply statistical representativeness.
- Repeated engagement over time allows us to track emerging themes leading up to Accountability Sessions and shifts in sentiment between Accountability Sessions.
- This approach makes results easy to interpret for both industry stakeholders and community members.
- It supports transparency and consistency across reporting periods.
- Issues highlighted through this reporting are explored in greater depth during Accountability Sessions, alongside other evidence sources.

## How to read this report

- Findings are indicative and directional, not statistically representative of all customers.
- Results reflect the views of a small, engaged panel and should not be interpreted as prevalence measures.
- Changes in sentiment may be influenced by wider events, communications, or media coverage and should not be read as standalone performance change.
- Issues highlighted through this reporting method are explored in greater depth during Accountability Sessions, alongside other evidence sources

*Findings should be used to inform understanding, discussion and Accountability Sessions, rather than as standalone performance measures.*

# Sample



Each Water Voice community includes around **50 participants per water company**, reflecting a balanced mix of demographics, life stages, and perspectives. All participants are the sole or joint water bill payer within their household.

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.

# Project Update: A Strong Start for Water Voice



## Progress update

Our Water Voice community has had a very positive start, with exceptionally high engagement from community members, reflected in a 96% survey completion rate for December, alongside constructive interest from across the water industry.

Sustained participation has been particularly strong: **691 community members (86%) have completed all five surveys issued to date**, demonstrating a level of retention that is notably high for a longitudinal panel of this kind.

Early participation and feedback highlight a strong appetite for ongoing dialogue and meaningful involvement, providing a solid and credible foundation as the communities moves towards their first Accountability Sessions.

*"I have never been involved in anything like before and I'm finding it very cathartic! The platform is regularly updated and I am really enjoying going in and seeing what other people have to say and leaving my own comments."*

*South East Water  
Community Member*

*"I'm really enjoying the surveys, thank you and Merry Christmas."*

*United Utilities  
Community Member*

## Looking ahead

Over the coming month, we will deepen engagement with community members by clearly **explaining how the Accountability Sessions work** and what role community members play within them.

The next Spotlight survey will explore customers' **perceptions of billing and value for money**. It will test how aware customers are of what they pay, how easy they find their bills to understand, and whether they feel the services they receive represent good value for money.

Alongside this, we will ask community members to identify the **issues they most want to prioritise** when questioning their water company in our upcoming Accountability Sessions - ensuring future discussions are firmly grounded in what matters most to customers.

*"Looks like a great project as follow Welsh water online and seen they invested £665 million for next 12 months."*

*Welsh Water  
Community Member*

*"Taylor McKenzie did a great job of summarising the main issues we've highlighted...I'm really happy with how our insights have been listened to and brought forward in the first months alone!"*

*Severn Trent Water  
Community member*



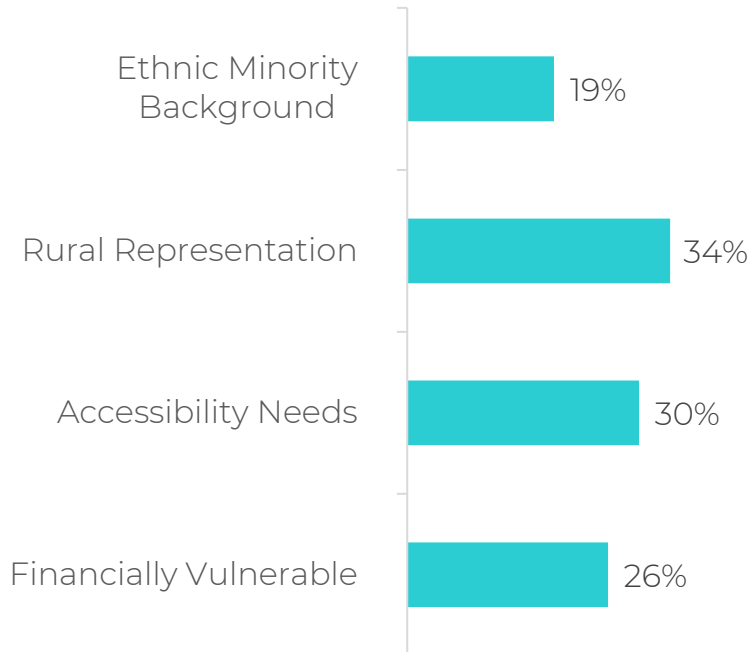
# Sample

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

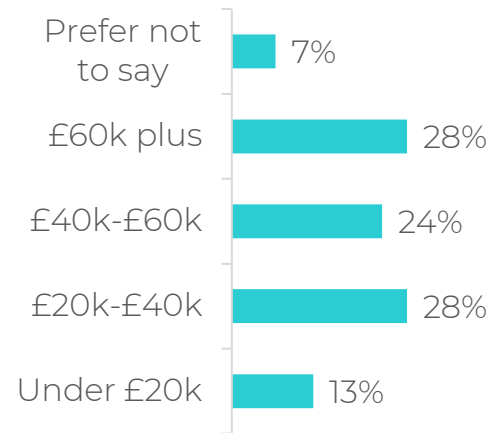


**860** members onboarded  
**822** actively participated

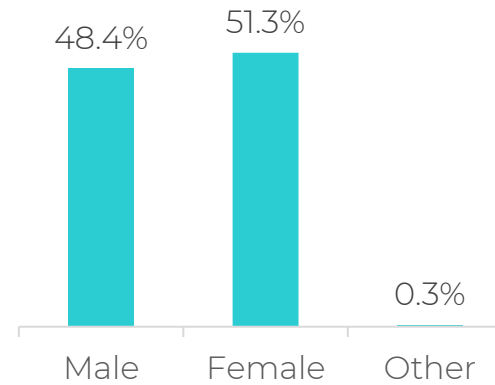
## Inclusivity



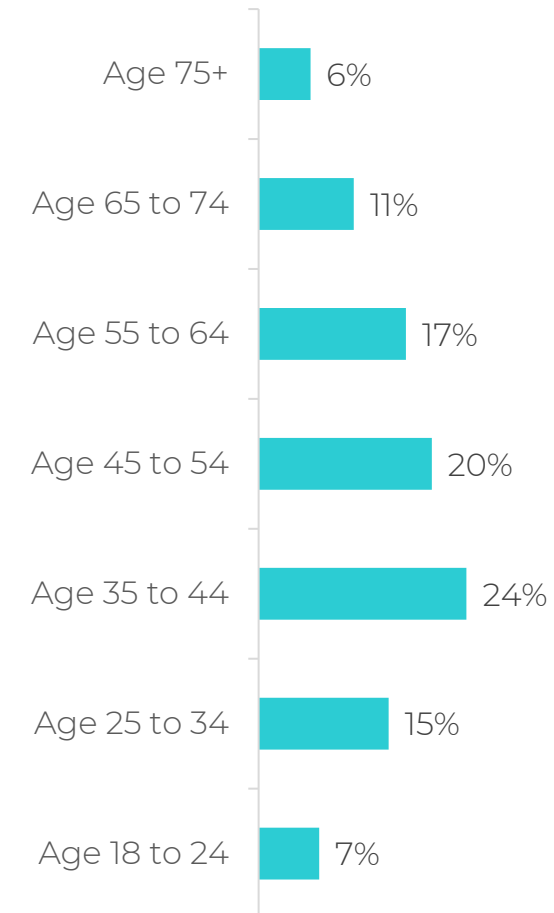
## Household income



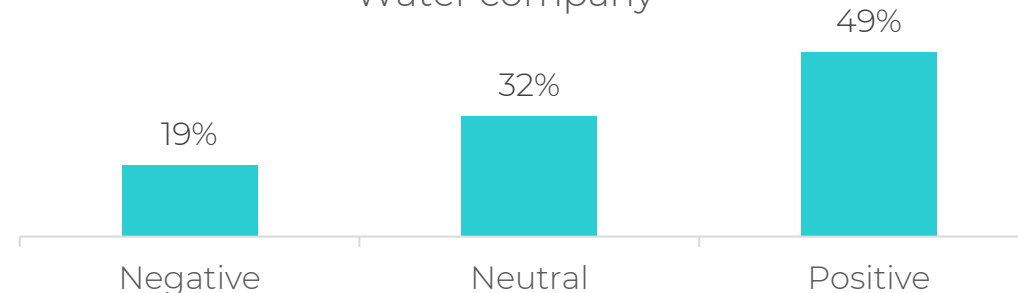
## Gender



## Age



## Attitude to Water company



Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

# Executive Summary

Total results, across all 16 communities



Topic	Nov 2025 Total Community Agreement %	Dec 2025 Total Community Agreement %	+/- difference % Total Community Nov vs Dec
Responsiveness (Always/often responsive)	29%	33%	4%
Recent Experience (Positive recent experience)	42%	46%	4%
General outlook (Positive outlook)	46%	49%	3%
Communication (Fair/good communication)	34%	38%	4%
Brand Connection (someone I'd really like & have a lot in common with)	25%	31%	6%
Brand Momentum (salience) (on its way up/has a lot going for it)	20%	22%	2%
Trust (a great deal/some trust)	48%	53%	5%
Past 4 Week Interaction	39%	40%	1%
Past 4 Week Disruption	5%	6%	1%
Past 4 Week Water Quality Issues	7%	6%	-1%
Past 4 Week Sewerage issues	2%	3%	1%
<b>Overall Value for Money (satisfied, scoring 7-10)</b>	<b>40%</b>	<b>46%</b>	<b>6%</b>
<b>Overall Satisfaction – Water (satisfied, scoring 7-10)</b>	<b>52%</b>	<b>58%</b>	<b>6%</b>
Colour & Appearance (satisfied, scoring 7-10)	82%	83%	1%
Taste & Smell (satisfied, scoring 7-10)	75%	77%	2%
Safety of Drinking Water (satisfied, scoring 7-10)	77%	79%	2%
Reliability of Supply (satisfied, scoring 7-10)	87%	87%	0%
Water Pressure (satisfied, scoring 7-10)	77%	77%	0%
<b>Overall Satisfaction - Sewerage</b>	<b>51%</b>	<b>55%</b>	<b>4%</b>
Reducing smells from sewage treatment works (satisfied, scoring 7-10)	31%	42%	11%
Maintenance of sewerage pipes and treatment works (satisfied, scoring 7-10)	35%	44%	9%
Cleaning wastewater properly before release back into environment (satisfied, scoring 7-10)	30%	40%	10%
Minimising sewer flooding (satisfied, scoring 7-10)	30%	39%	9%

This dashboard presents directional insight from a small, engaged panel and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822

# Core themes

## Community Insights



**Trust is increasingly shaped by environmental performance**, not personal service experience. Concerns about sewage, long-term resilience and environmental impact weigh heavily on customer confidence.



**Value for money concerns are driven by transparency, not service failure.** Customers want clearer evidence of where their money is going and how investment / increased bills benefit the environment, service levels and infrastructure.



**Day-to-day water services remain generally reliable**, with high satisfaction around supply continuity, safety and quality. These fundamentals are stable across communities.



**Communication is an opportunity**, particularly around drought. Inconsistent messaging leaves customers unsure when action is required and how household behaviour fits into long-term water management.

“Thames Water provides a reliable service, and I haven’t experienced any major issues with water supply, quality, or sewage. However, I haven’t had any direct communication from them, and I don’t feel particularly engaged with the company. They do their job, but there’s nothing outstanding that makes me rate them higher.”

*Female, 25, Lives Alone, Thames Water*

“Not enough money spent on major infrastructure work, to help prevent water loss and pollution control. Too much profit going to shareholders.”

*Male, 50, Lives with partner & adult family, Hafren Dyfrdwy*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Anglian Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

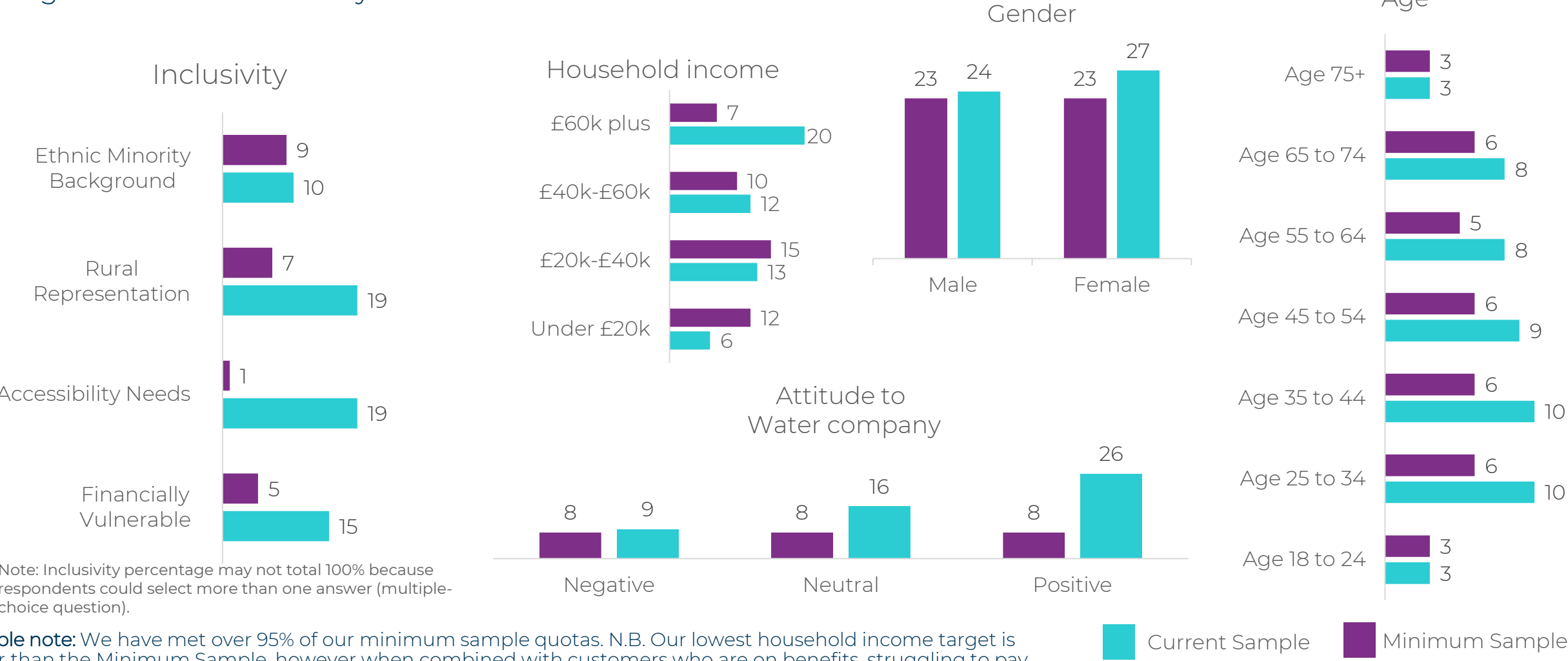
Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)





Anglian Water Community members: 51



**Sample note:** We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the Minimum Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met.

# Dashboard Summary

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



Topic	Dec 2025 Anglian Water Community Agreement %	+/- difference % Anglian Water Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Anglian Water vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	29%	2%	33%	-4%
Recent Experience (Positive recent experience)	51%	2%	46%	5%
General outlook (Positive outlook)	57%	2%	49%	8%
Communication (Fair/good communication)	22%	-2%	38%	-16%
Brand Connection (someone I'd really like & have a lot in common with)	28%	3%	31%	-3%
Brand Momentum (salience) (on its way up/has a lot going for it)	16%	-2%	22%	-6%
Trust (a great deal/some trust)	53%	-1%	53%	0%
Past 4 Week Interaction	37%	-10%	40%	-3%
Past 4 Week Disruption	8%	4%	6%	2%
Past 4 Week Water Quality Issues	8%	-2%	6%	2%
Past 4 Week Sewerage issues	2%	0%	3%	-4%
Overall Value for Money	39%	6%	46%	-7%
Overall Satisfaction – Water (satisfied, scoring 7-10)	61%	6%	58%	3%
Colour & Appearance	84%	2%	83%	1%
Taste & Smell	71%	2%	77%	-6%
Safety of Drinking Water	77%	1%	79%	-2%
Reliability of Supply	86%	0%	87%	-1%
Water Pressure	69%	-9%	77%	-8%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	50%	-1%	55%	-5%
Reducing smells from sewage treatment works	26%	-5%	42%	-16%
Maintenance of sewerage pipes and treatment works	48%	12%	44%	4%
Cleaning wastewater properly before release back into environment	36%	10%	40%	-4%
Minimising sewer flooding	34%	2%	39%	-5%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Anglian Water Base Size: 51

# Executive Summary

## Overview of Key Findings



### Barometer

- Satisfaction remains positive but uncertain value for money perceptions highlights an opportunity for Anglian Water to focus on communicating the work they do.
- Opportunities for Anglian Water to be more proactive in communicating how money is spent and the work they are doing to improve rivers.

### Spotlight

- Inconsistencies in drought awareness/communication suggest an opportunity for Anglian Water to review how drought levels and appropriate actions are communicated to customers to ensure a consistent understanding.
- Anglian Water is seen as most responsible for reducing water usage, but confidence in the effectiveness of plans is lower than the industry average. There is an opportunity for the company to do more in this area and communicate more effectively.

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

**7.02/10 vs 6.57/10 (Total)**

## Why do Anglian Water customers feel this way?

Most customers report reliable supply, good-tasting drinking water, quick responses when contacted, and few disruptions. However, trust is undermined by sewage discharges into rivers and seas, concerns about profits and bonuses over reinvestment, rising and poorly explained bills.



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

Total Base Size: 822  
Anglian Water Base Size: 51



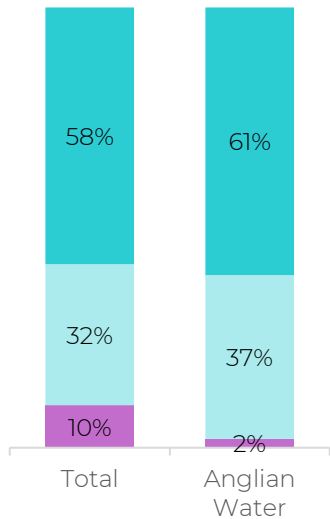
# Anglian Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

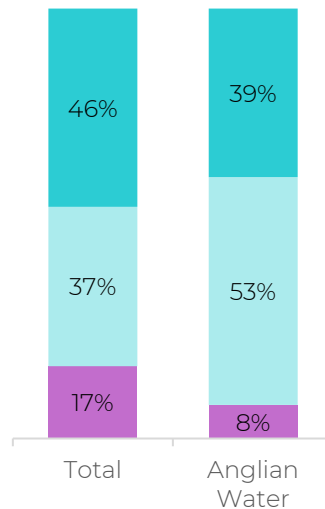
61% are satisfied with Anglian Water overall  
2% are not satisfied

Overall Satisfaction - Water



39% are satisfied with value for money  
8% are not satisfied

Overall Value for Money Satisfaction



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

In line with the November wave, satisfaction is slightly above average with value for money perceptions being dominated with higher “neutral” scores.

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

## Why have you given this overall satisfaction score on water?

*“I have running water when I turn on the tap. I have zero choice as to the provider I must use.”*

*Female, 38, Live Alone, 10/10 satisfaction score*

*“Anglian water is the same as the other providers in my opinion. Doesn’t do more or less.”*

*Female, 33, Live with partner, 6/10 satisfaction score*

*“Poor record with sewage going into rivers and sea however very few problems with quality of water supplied or disruptions to our water supply”*

*Male, 45, Live with adult family member, 5/10 satisfaction score*

**Satisfaction remains positive** but uncertain value for money perceptions highlights an opportunity for Anglian Water to focus on communicating the work they do.

Total Base Size: 822  
Anglian Water Base Size: 51





# Anglian Water: Barometer Findings

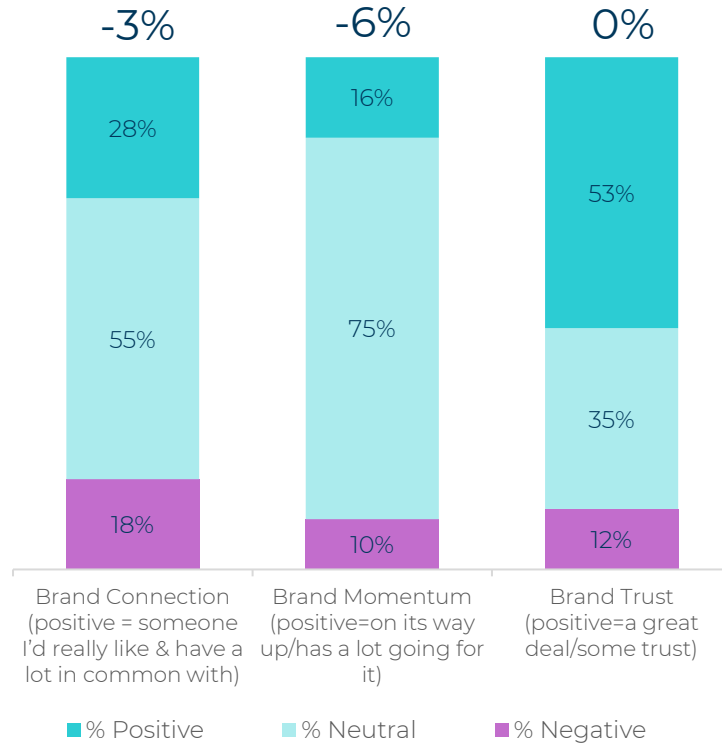
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Anglian Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	45%	+2%	-6%
Improves our rivers	18%	+6%	-10%
Creates a greener future	29%	+9%	-4%
Spends customers' money wisely	18%	+4%	-11%
Contributes to our communities	41%	+10%	+2%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	61%	+6%	+3%
Colour & Appearance	84%	+2%	1%
Taste & Smell	71%	+2%	-6%
Safety of Drinking Water	77%	+1%	-2%
Reliability of Supply	86%	0%	-1%
Water Pressure	69%	-9%	-8%
<b>Sewerage</b>			
Overall Satisfaction	50%	-1%	-5%
Reducing smells from sewage treatment works	26%	-4%	-16%
Maintenance of sewerage pipes and treatment works	48%	+12%	+4%
Cleaning wastewater properly before release back into environment	36%	+10%	-4%
Minimising sewer flooding	34%	+2%	-5%

Opportunities for Anglian Water to be more proactive in communicating how money is spent, and the work they are doing to improve rivers.

Total Base Size: 822  
Anglian Water Base Size: 51



# Anglian Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

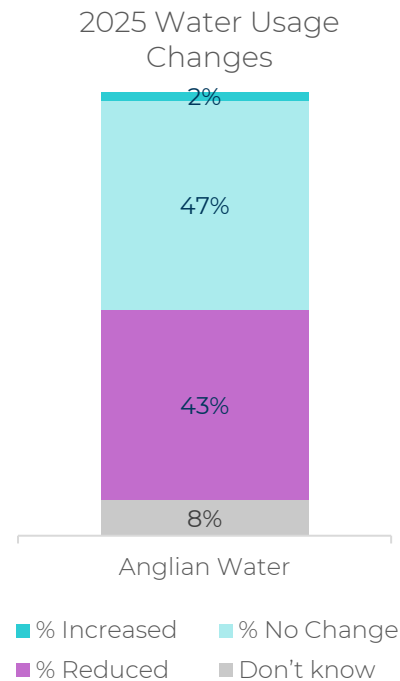
43% of Anglian Water customers stated that they reduced the amount of water they used in 2025. Whilst 61% were unaware of any drought related communications being issued in their area, 10% thought that there was a hose pipe ban in place and 24% had a request from Anglian to reduce water use.

*"As a low water use household, ~30m<sup>3</sup> p.a., the dry weather had most effect on the garden, whereby the water butts were empty and we used grey water for watering where possible"*

*Male, 53, Lives with partner*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	22%
An official drought declaration	4%
A temporary use ban (e.g., hosepipe ban)	10%
A request from my water company to voluntarily reduce water use	24%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	-
I am not aware of anything being issued in my area	61%

No temporary use ban was in place in 2025



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

1. No impact - 43%
2. Affected garden - 35%
3. Felt worried about future water shortages - 27%
4. Felt worried about environmental impacts - 27%

Inconsistencies in drought awareness/communication suggest an opportunity for Anglian Water to review how drought levels and appropriate actions are communicated to customers to ensure a consistent understanding.

Total Base Size: 822  
Anglian Water Base Size: 51



# Anglian Water: Spotlight Findings

## Drought

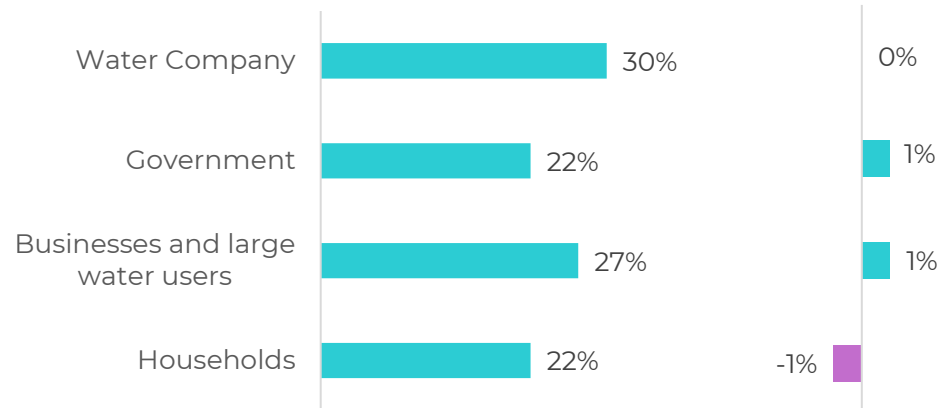


The voice for water consumers  
Llais defnyddwyr dŵr

For Anglian Water customers, water companies are seen as most responsible for reducing water usage, followed closely by businesses and large water users, reflecting their control over infrastructure and high consumption. Government and households are seen as equally responsible, but more in a supporting role rather than leading change during droughts.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

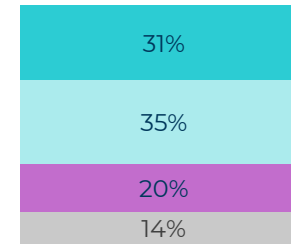
Difference vs Total



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

Anglian Water Drought Communication

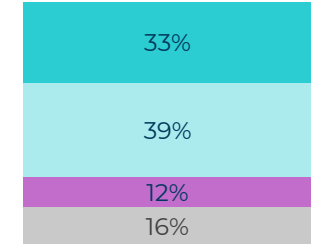
-4%



Anglian Water  
 ■ Don't know ■ % Poorly  
 ■ % Neutral ■ % Well

Confidence that Anglian Water have effective plans

-10%



Anglian Water  
 ■ Don't know ■ % Not Confident  
 ■ % Neutral ■ % Confident

What support could Anglian Water provide?

1. Clear updates on the current water resource situation in my area: 55%
2. Free or discounted water-saving devices (e.g., water butts, shower timers) 41%
3. Clear explanation of the company's drought management actions: 31%

Anglian Water are seen as most responsible for reducing water usage, but confidence in the effectiveness of plans is lower than the industry average. There is an opportunity for the company to do more in this area and communicate more effectively.

Total Base Size: 822  
Anglian Water Base Size: 51



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Northumbrian Water and Essex & Suffolk Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

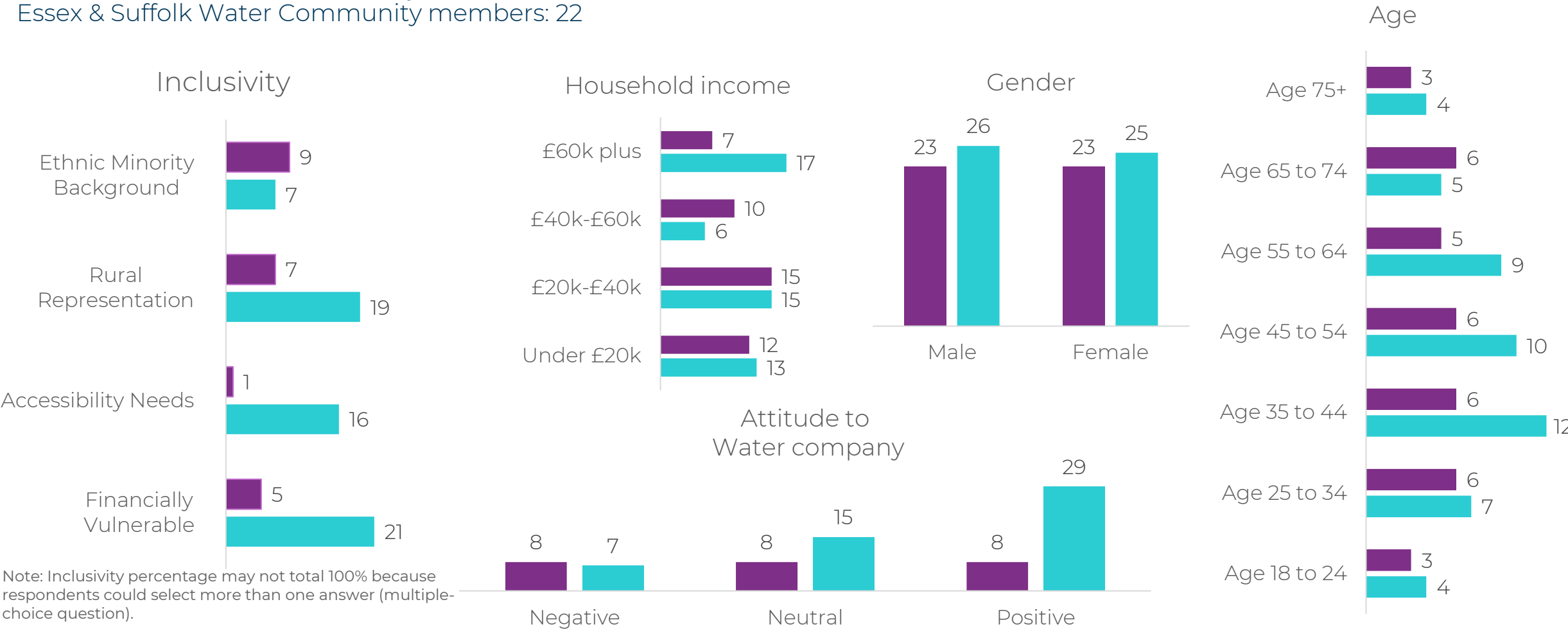


# Northumbrian Water and Essex & Suffolk Water

Community population



Northumbrian Water Community members : 29  
Essex & Suffolk Water Community members: 22



**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.

# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 Northumbrian and Essex & Suffolk Community Agreement %	+/- difference % Northumbrian and Essex & Suffolk Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Northumbrian and Essex & Suffolk vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	29%	1%	33%	-4%
Recent Experience (Positive recent experience)	53%	2%	46%	7%
General outlook (Positive outlook)	57%	2%	49%	8%
Communication (Fair/good communication)	49%	15%	38%	11%
Brand Connection (someone I'd really like & have a lot in common with)	28%	0%	31%	-3%
Brand Momentum (salience) (on its way up/has a lot going for it)	28%	2%	22%	6%
Trust (a great deal/some trust)	63%	3%	53%	10%
Past 4 Week Interaction	39%	5%	40%	-1%
Past 4 Week Disruption	10%	0%	6%	4%
Past 4 Week Water Quality Issues	4%	-4%	6%	-2%
Past 4 Week Sewerage issues	8%	2%	3%	5%
Overall Value for Money	57%	11%	46%	11%
Overall Satisfaction – Water (satisfied, scoring 7-10)	71%	7%	58%	13%
Colour & Appearance	88%	8%	83%	5%
Taste & Smell	90%	10%	77%	13%
Safety of Drinking Water	90%	10%	79%	11%
Reliability of Supply	92%	0%	87%	5%
Water Pressure	80%	0%	77%	3%
<b>Northumbrian Water Only</b>				
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	78%	17%	55%	23%
Reducing smells from sewage treatment works	48%	12%	42%	6%
Maintenance of sewerage pipes and treatment works	59%	13%	44%	15%
Cleaning wastewater properly before release back into environment	59%	16%	40%	19%
Minimising sewer flooding	48%	19%	39%	9%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Northumbrian and Essex & Suffolk Water Base Size: 51

# Executive Summary

## Overview of Key Findings



The voice for water consumers  
Llais defnyddwyr dŵr

### Barometer

- General satisfaction and value for money satisfaction has increased vs the November wave. Continue to build on positive experiences & perceptions.
- Northumbrian Water and Essex & Suffolk Water continue to perform well across all metrics, with Brand Trust above the industry total.

### Spotlight

- Differences in awareness of drought actions suggest an opportunity to ensure all customers have a consistent awareness and understanding of drought and any measures that are in place to combat it.
- Offering free/discounted water-saving devices and tools to help customers track their water use represent potential opportunities to help households manage their water usage.

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

**6.84/10 vs 6.57/10 (Total)**

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

Overall feedback on Northumbrian Water and Essex & Suffolk Water is positive and there are few areas of complaint. High bills (especially unmetered), concerns about executive pay/dividends, sewage overflows, and a sense that environmental action and long-term resilience (leaks, drought, climate) need more visible urgency are driving any negativity.



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

Total Base Size: 822  
Northumbrian Water and Essex  
& Suffolk Water Base Size: 51



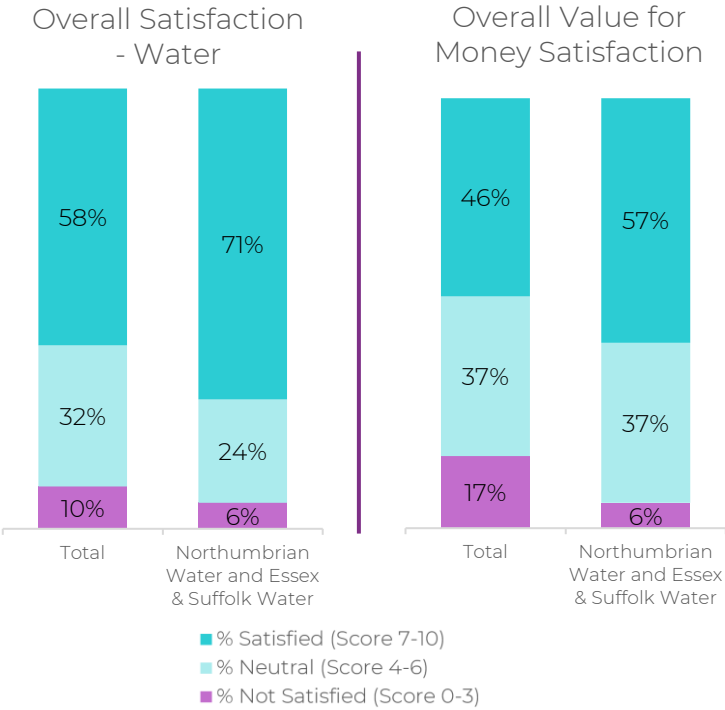
# Northumbrian Water and Essex & Suffolk Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

71% are satisfied with Northumbrian Water and Essex & Suffolk Water overall  
6% are not satisfied

57% are satisfied with value for money  
6% are not satisfied



Satisfaction is above industry average and is up vs the November wave. Satisfaction with value for money is also higher. Customers report reliable supply, good water quality, quick issue resolution, clear bills, and effective local communication.

## Why have you given this overall satisfaction score on water?

*"I'm happy day to day but would have appreciated being told I could have a water meter - free - which would have halved my water costs. 15 years ago. I could have asked but I thought I'd be exempt as privately renting. No compensation offered when I queried it."*

*Female, 65,  
Live alone, Northumbrian Water , 8/10 satisfaction score*

*"They provide water and take away waste with no disruption"*

*Male, 45, lives with partner/children, Northumbrian Water, 6/10 satisfaction score*

*"Too expensive and they make too much profit and pollute the environment"*

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

General satisfaction and value for money satisfaction has increased vs the November wave. Continue to build on positive experiences & perceptions.

Total Base Size: 822  
Northumbrian Water and Essex & Suffolk Water Base Size: 51





# Northumbrian Water and Essex & Suffolk Water: Barometer Findings

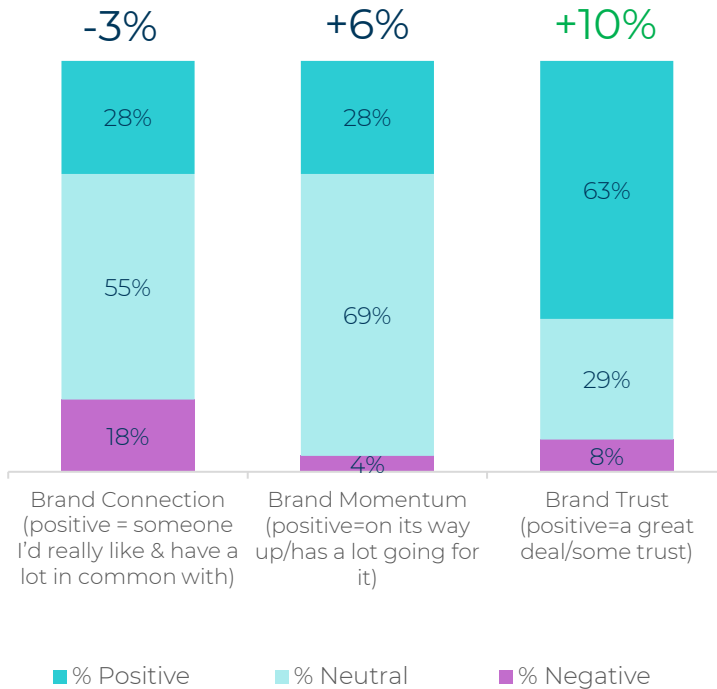
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Northumbrian Water and Essex & Suffolk Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	59%	+9%	+8%
Improves our rivers	33%	+3%	+5%
Creates a greener future	35%	+3%	+2%
Spends customers' money wisely	39%	+19%	+10%
Contributes to our communities	45%	+9%	+6%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	71%	+7%	+13%
Colour & Appearance	88%	+8%	+5%
Taste & Smell	90%	+10%	+13%
Safety of Drinking Water	90%	+10%	+11%
Reliability of Supply	92%	0%	+5%
Water Pressure	80%	0%	+3%
<b>Sewerage (Northumbrian Water Only)</b>			
Overall Satisfaction	78%	+17%	+23%
Reducing smells from sewage treatment works	48%	+12%	+6%
Maintenance of sewerage pipes and treatment works	59%	+13%	+15%
Cleaning wastewater properly before release back into environment	59%	+16%	+19%
Minimising sewer flooding	48%	+19%	+9%

Northumbrian Water and Essex & Suffolk Water continue to perform well across all metrics, with Brand Trust above the industry total.

Total Base Size: 822  
Northumbrian Water and Essex  
& Suffolk Water Base Size: 51



# Northumbrian Water and Essex & Suffolk Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

65% stated that drought had no impact on them/their household. As such the majority of water customers (52%) made no change to the amount of water they used in 2025. Whilst 69% were unaware of any drought related communications being issued in their area, 17% thought that there was a temporary use ban in place, and 15% had a request to reduce water use.

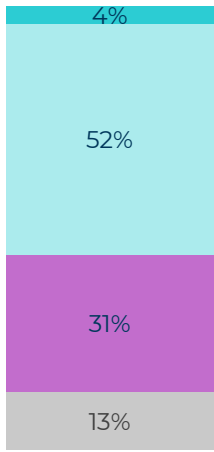
*“The lack of rainfall made grasslands and natural areas look stressed , and I worry about how this affects insects”*

*Male, 38, Lives with partner/children, Northumbrian Water*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	12%
An official drought declaration	2%
A temporary use ban (e.g., hosepipe ban)	17%
A request from my water company to voluntarily reduce water use	15%
A non-essential use ban affecting businesses	2%
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	69%

No temporary use ban was in place in 2025

2025 Water Usage Changes



■ % Increased    ■ % No Change  
■ % Reduced    ■ Don't know

In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact - 65%
- 2. Felt worried about environmental impacts - 21%
- 3. Felt worried about future water shortages - 19%
- 4. Affected garden - 10%

Differences in awareness of drought actions suggest an opportunity to ensure all customers have a consistent awareness and understanding of drought and any measures that are in place to combat it.

Total Base Size: 822  
Northumbrian Water and Essex  
& Suffolk Water Base Size: 51



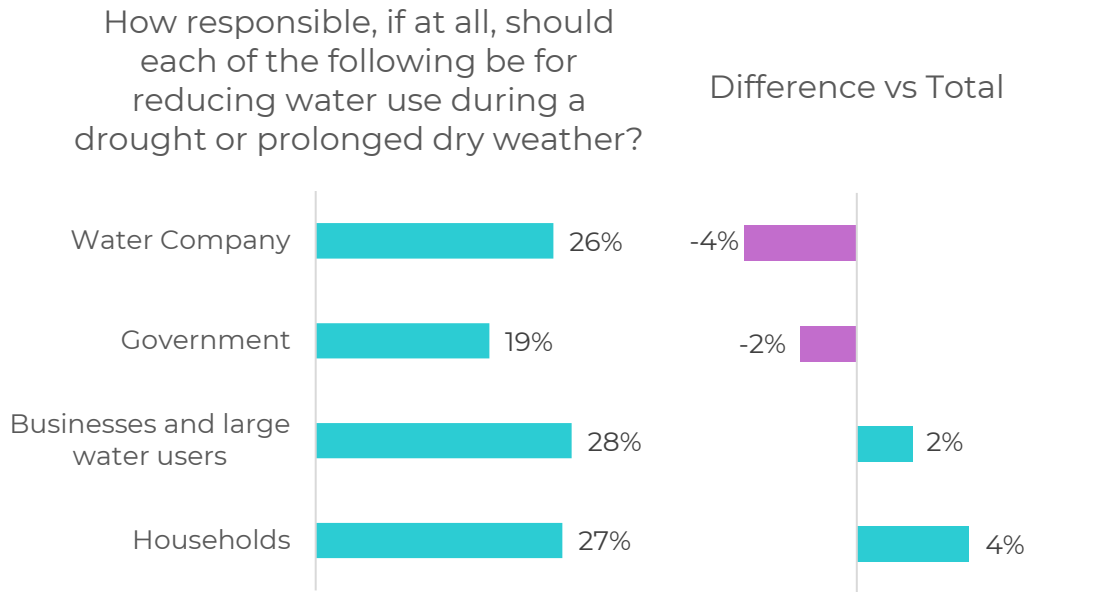
# Northumbrian Water and Essex & Suffolk Water: Spotlight Findings

Drought

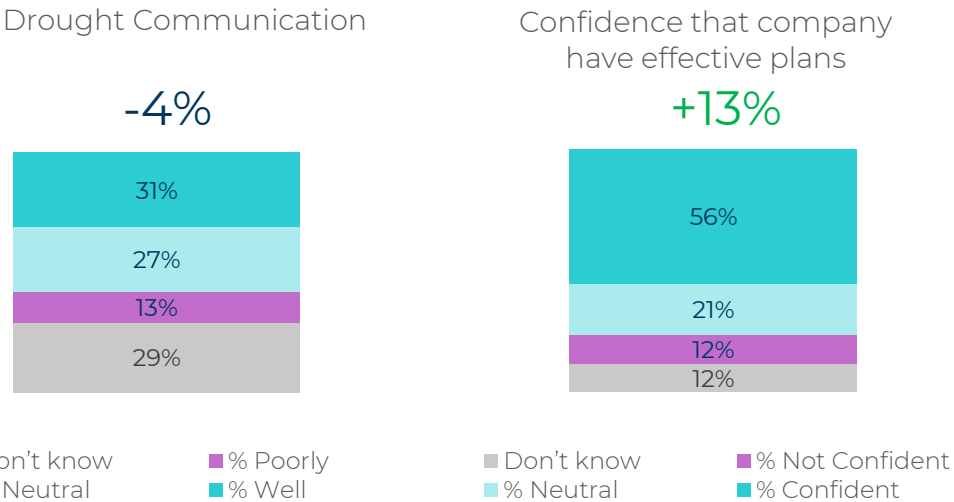


The voice for water consumers  
Llais defnyddwyr dŵr

For customers, when it comes to responsibility for reducing water usage, households, businesses and water company all seen as having a similar role to play. Households are slightly more prominent vs. the industry average, driven by views that day-to-day behaviour and discretionary use sit with individuals. Government is seen as setting the rules and long-term resilience, but not as the main driver of short-term reductions during dry periods.



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



What support could Northumbrian Water and Essex & Suffolk Water provide?

- 1. Free or discounted water-saving devices (e.g., water butts, shower timers) 41%
- 2. Tools to help track my water use (e.g., online dashboard, app updates) 41%
- 3. Tailored support for vulnerable customers, such as bottled water drops if water supply is disrupted 31%

Offering free/discounted water-saving devices and tools to help customers track their water use represent potential opportunities to help households manage their water usage.

Total Base Size: 822  
Northumbrian Water and Essex & Suffolk Water Base Size: 51



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Severn Trent Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

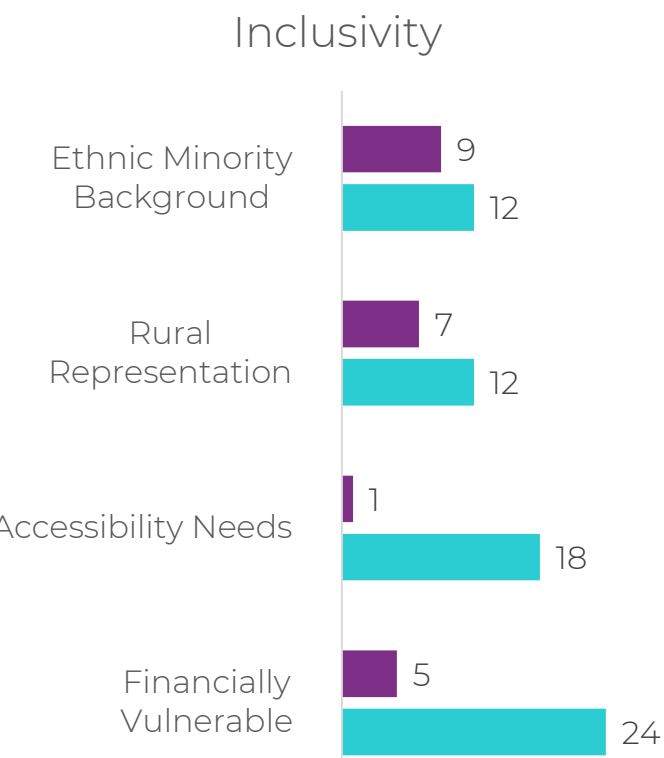
[ccw.org.uk](https://ccw.org.uk)

# Severn Trent Water

Community population

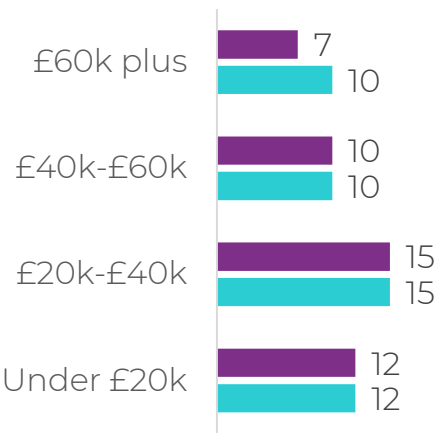


Severn Trent Community members: 47

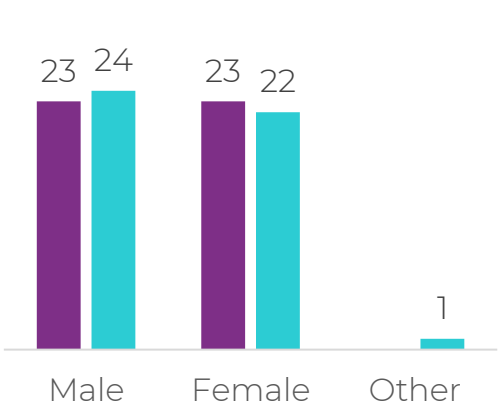


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

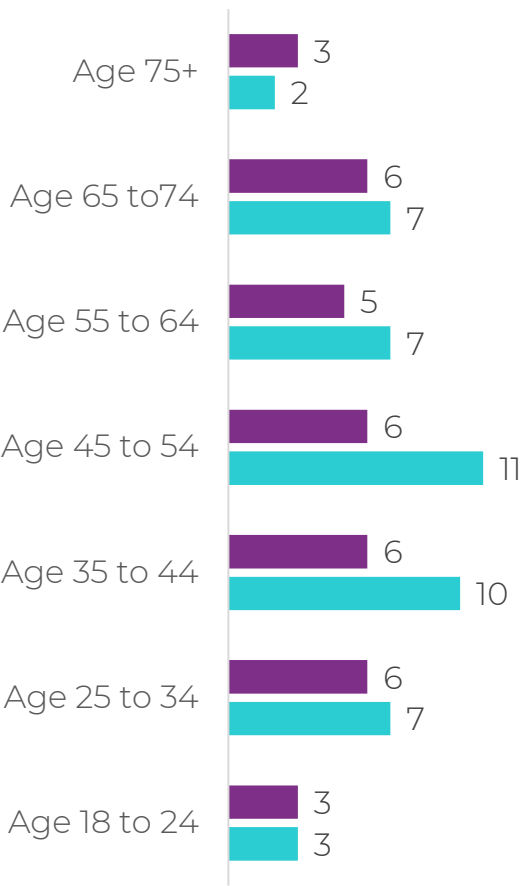
Household income



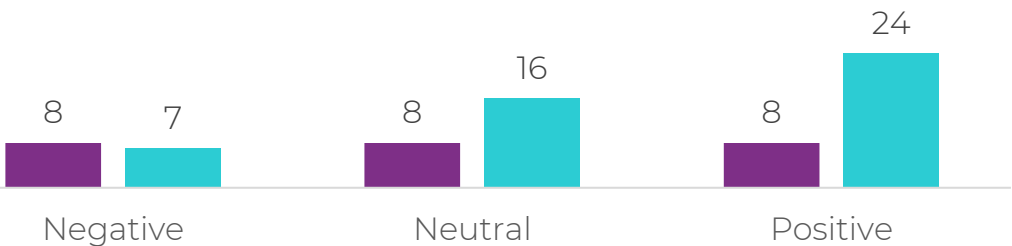
Gender



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, including recruiting more over 75 year olds.



# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 Severn Trent Community Agreement %	+/- difference % Severn Trent Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Severn Trent vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	28%	1%	33%	-5%
Recent Experience (Positive recent experience)	45%	3%	46%	-1%
General outlook (Positive outlook)	51%	3%	49%	2%
Communication (Fair/good communication)	34%	-6%	38%	-4%
Brand Connection (someone I'd really like & have a lot in common with)	21%	1%	31%	-10%
Brand Momentum (salience) (on its way up/has a lot going for it)	13%	-5%	22%	-9%
Trust (a great deal/some trust)	53%	4%	53%	0%
Past 4 Week Interaction	34%	-18%	40%	-6%
Past 4 Week Disruption	4%	-4%	6%	-2%
Past 4 Week Water Quality Issues	6%	-8%	6%	0%
Past 4 Week Sewerage issues	0%	0%	3%	-3%
Overall Value for Money	40%	4%	46%	-6%
Overall Satisfaction – Water (satisfied, scoring 7-10)	51%	3%	58%	-7%
Colour & Appearance	79%	3%	83%	-4%
Taste & Smell	77%	9%	77%	0%
Safety of Drinking Water	77%	1%	79%	-2%
Reliability of Supply	85%	-1%	87%	-2%
Water Pressure	77%	5%	77%	0%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	55%	11%	55%	0%
Reducing smells from sewage treatment works	41%	15%	42%	-1%
Maintenance of sewerage pipes and treatment works	49%	15%	44%	5%
Cleaning wastewater properly before release back into environment	43%	11%	40%	3%
Minimising sewer flooding	36%	2%	39%	-3%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Severn Trent Base Size: 47

# Executive Summary

## Overview of Key Findings

### Barometer

- There are opportunities to improve overall satisfaction. Improving billing transparency and more openly communicating how money is spent will likely help.
- Some improvement in scores compared to the November wave but brand connection and momentum is below the industry total, highlighting an opportunity for the company.

### Spotlight

- Media is likely having an impact on customer perceptions of drought and any drought orders in place. Opportunity to more consistently communicate with customers to ensure they know when they should take action (and when action is not required).
- Drought communication – from a customer perspective – is perceived more strongly than the industry average. Opportunity to provide clear updates on current water resource and offer free/discounted water saving equipment as well as tools to help customers track water usage.



The voice for water consumers  
Llais defnyddwyr dŵr

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

**6.53/10 vs 6.57/10 (Total)**

### Why do Severn Trent Water customers feel this way?

Most customers report no recent issues, reliable supply, and acceptable water quality, with problems generally resolved when raised and some praise for support schemes and improving communications. However, satisfaction is dampened by high bills, and concerns about monopoly power, lack of plain-English billing transparency, underinvestment in infrastructure, and sewerage/flooding impacts on local rivers.



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

Total Base Size: 822  
Severn Trent Base Size: 47



# Severn Trent Water: Barometer Findings

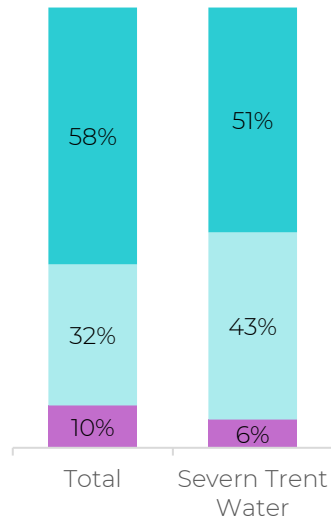


The voice for water consumers  
Llais defnyddwyr dŵr

51% are satisfied with  
Severn Trent Water  
overall

6% are not satisfied

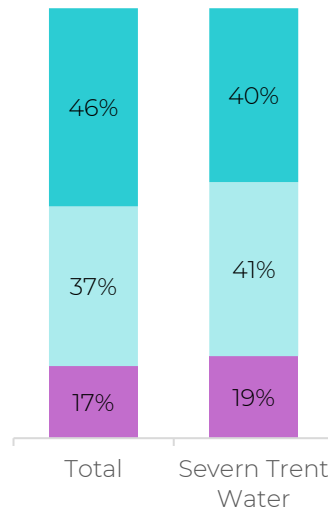
Overall Satisfaction  
- Water



40% are satisfied  
with value for money

19% are not satisfied

Overall Value for  
Money Satisfaction



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

Satisfaction remains lower than average, and high levels of neutrality remain in overall satisfaction. Value for money satisfaction is also lower than the industry total.

## Why have you given this overall satisfaction score on water?

*"I feel Severn Trent are very supportive with the schemes they have in place for low-income families"*

*Female, 41,  
Lives with children, 7/10  
satisfaction score*

*"I'm satisfied that actual water comes into my household but unsure how good the quality is"*

*Male, 39, lives alone, 5/10  
satisfaction score*

*"I have not had any issues recently, but when I have in the past they have acted on it"*

*Female, 60, lives alone, 8/10  
satisfaction score*

There are opportunities to improve overall satisfaction. Improving billing transparency and more openly communicating how money is spent will likely help.

Total Base Size: 822  
Severn Trent Base Size: 47



# Severn Trent Water: Barometer Findings

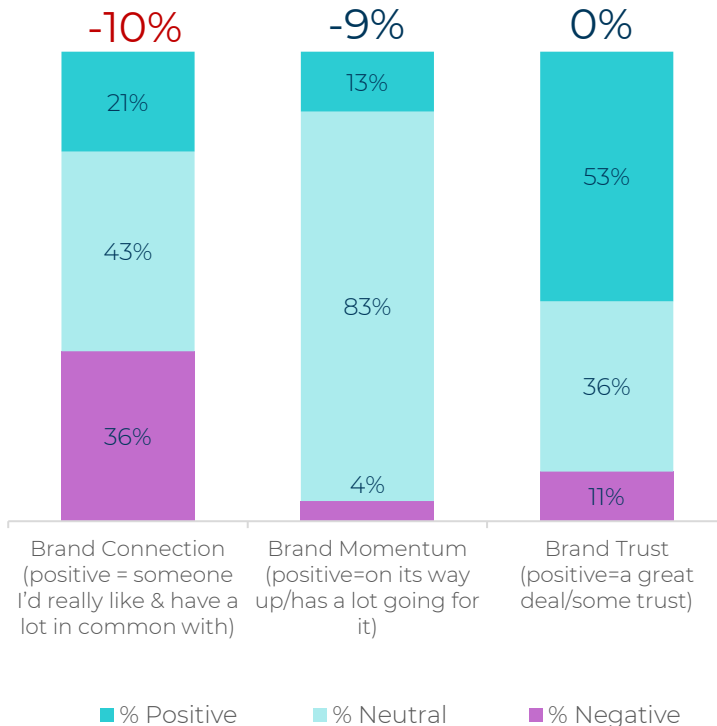
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Severn Trent Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	59%	+9%	+8%
Improves our rivers	33%	+3%	+5%
Creates a greener future	35%	+3%	+2%
Spends customers' money wisely	39%	+19%	+10%
Contributes to our communities	45%	+9%	+6%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	51%	+3%	-7%
Colour & Appearance	79%	+3%	-4%
Taste & Smell	77%	+9%	0%
Safety of Drinking Water	77%	+1%	-2%
Reliability of Supply	85%	-1%	-2%
Water Pressure	77%	5%	0%
<b>Sewerage</b>			
Overall Satisfaction	55%	11%	0%
Reducing smells from sewage treatment works	41%	+15%	-1%
Maintenance of sewerage pipes and treatment works	49%	+15%	+5%
Cleaning wastewater properly before release back into environment	43%	+11%	+3%
Minimising sewer flooding	36%	+2%	-3%

Some improvement in scores compared to the November wave but brand connection and momentum is below the industry total, highlighting an opportunity for the company.

Total Base Size: 822  
Severn Trent Base Size: 47



# Severn Trent Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

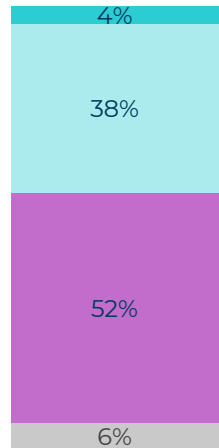
46% of respondents reported that drought had no impact on them or their household. However, 44% said they received a request to voluntarily reduce water usage, and 10% believed a temporary water-use ban was in place. Additionally, 38% were unaware of any official communication issued in their area. Overall, 52% stated that their water consumption decreased in 2025

*“Our grassed yellowed and was very patchy. I washed our cars with a bucket of water, rather than a hosepipe. I used a watering can to water plants/trees instead of a hosepipe/sprinkler.”*

*Male, 58, Lives with partner/children*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	31%
An official drought declaration	2%
A temporary use ban (e.g., hosepipe ban)	10%
A request from my water company to voluntarily reduce water use	44%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	-
I am not aware of anything being issued in my area	38%

2025 Water Usage Changes



■ % Increased    ■ % No Change  
■ % Reduced    ■ Don't know

In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact - 46%
- 2. Felt worried about environmental impacts - 27%
- 3. Affected garden - 25%
- 4. Reduced Water Pressure- 19%

No temporary use ban was in place in 2025

Media is likely having an impact on customer perceptions of drought and any drought orders in place. Opportunity to more consistently communicate with customers to ensure they know when they should take action (and when action is not required).





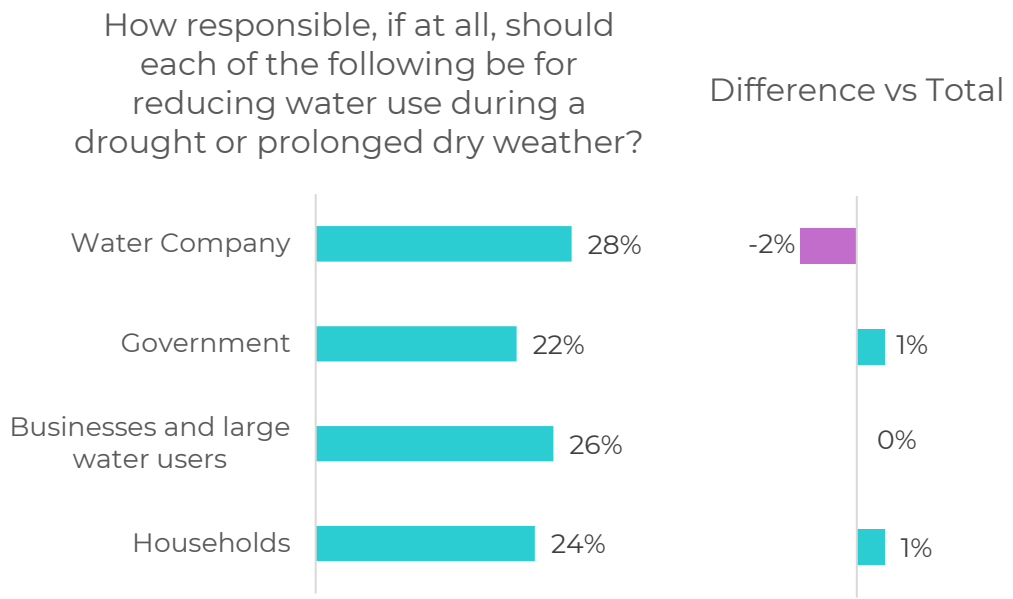
# Severn Trent Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

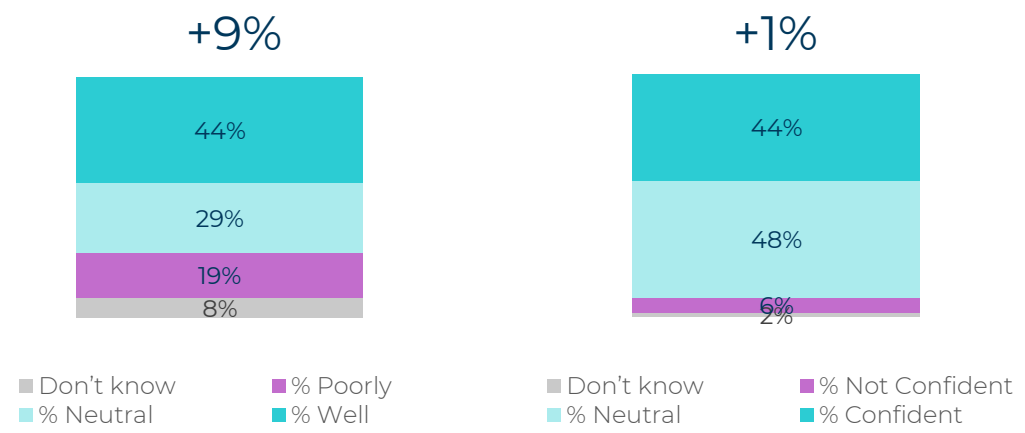
Water companies are seen as holding the greatest responsibility for reducing water usage, reflecting expectations around infrastructure management and leakage reduction. Businesses and households are seen as sharing a significant role, driven by usage levels and day-to-day behaviour, while government is primarily viewed as an enabler through policy, oversight and long-term planning rather than direct short-term control.



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

Drought Communication

Confidence that company have effective plans



What support could Severn Trent Water provide?

- 1. Clear updates on the current water resource situation in my area: 48%
- 2. Free or discounted water-saving devices (e.g., water butts, shower timers) 40%
- 3. Tools to help track my water use (e.g., online dashboard, app updates) 29%

Drought communication – from a customer perspective – is perceived more strongly than the industry average. Opportunity to provide clear updates on current water resource and offer free/discounted water saving equipment as well as tools to help customers track water usage.

Total Base Size: 822  
Severn Trent Base Size: 47



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

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

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](https://ccw.org.uk)

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

Community population



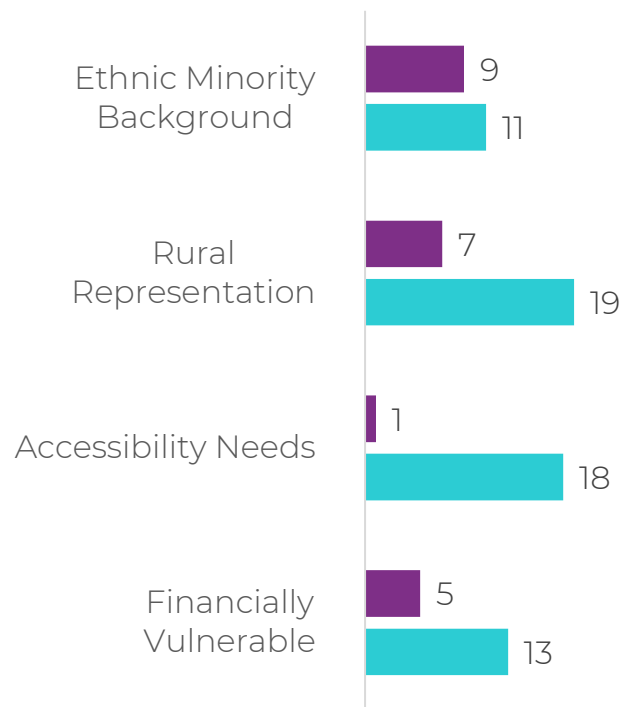
The voice for water consumers  
Llais defnyddwyr dŵr

South West Water Community members: 15

Bristol Water Community members: 28

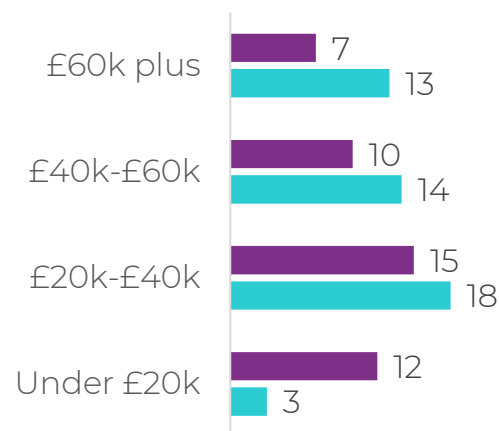
Bournemouth Water Community members: 5

## Inclusivity

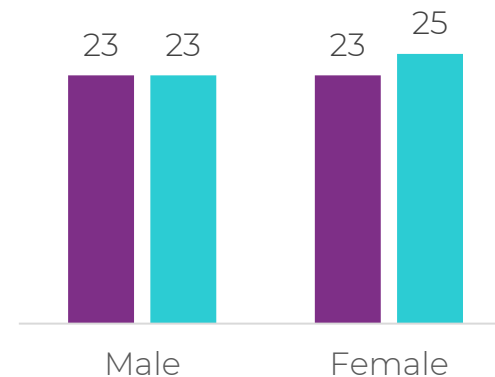


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

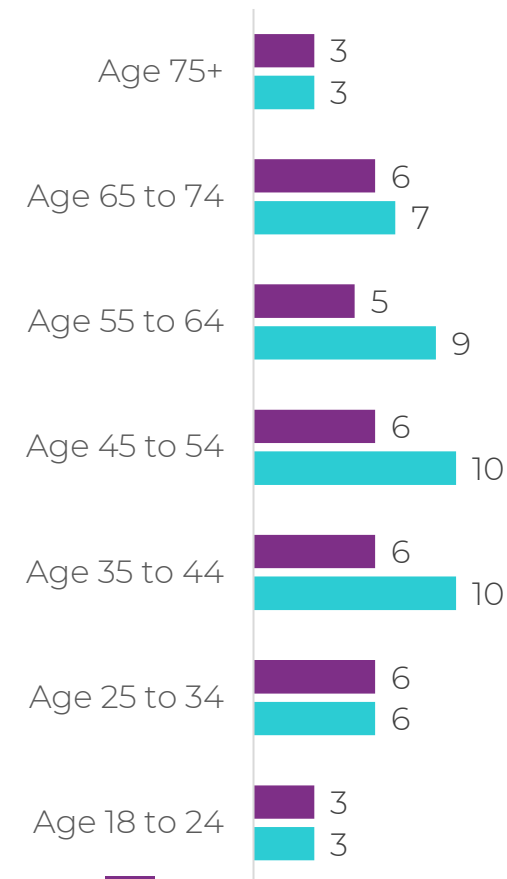
## Household income



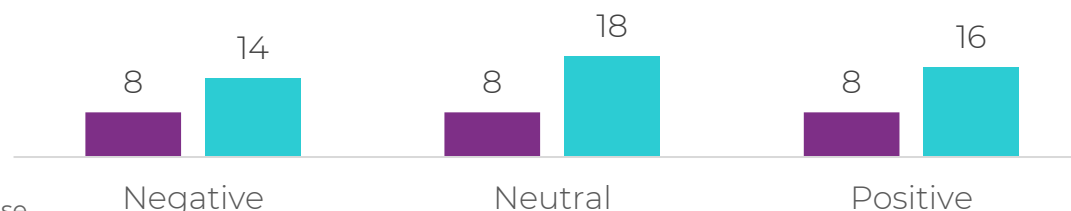
## Gender



## Age



## Attitude to Water company



Current Sample Minimum Sample

**Sample note:** We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the Minimum Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently topping up with South West Water customers only to ensure a more representative split across each water company.

# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 South West (incl Bristol and Bournemouth) Community Agreement %	+/- difference % South West (incl Bristol and Bournemouth) Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % South West (incl Bristol and Bournemouth) vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	23%	1%	33%	-10%
Recent Experience (Positive recent experience)	38%	1%	46%	-8%
General outlook (Positive outlook)	33%	-2%	49%	-16%
Communication (Fair/good communication)	31%	2%	38%	-7%
Brand Connection (someone I'd really like & have a lot in common with)	29%	6%	31%	-2%
Brand Momentum (salience) (on its way up/has a lot going for it)	17%	1%	22%	-5%
Trust (a great deal/some trust)	50%	9%	53%	-3%
Past 4 Week Interaction	35%	5%	40%	-5%
Past 4 Week Disruption	2%	0%	6%	-4%
Past 4 Week Water Quality Issues	2%	-7%	6%	-4%
Past 4 Week Sewerage issues	0%	-4%	3%	-3%
Overall Value for Money	35%	0%	46%	-11%
Overall Satisfaction – Water (satisfied, scoring 7-10)	48%	-3%	58%	-10%
Colour & Appearance	90%	11%	83%	7%
Taste & Smell	79%	-4%	77%	2%
Safety of Drinking Water	81%	6%	79%	2%
Reliability of Supply	91%	5%	87%	4%
Water Pressure	69%	-3%	77%	-8%
<b>South West &amp; Isles of Scilly Only</b>				
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	21%	-31%	55%	-34%
Reducing smells from sewage treatment works	29%	-4%	42%	-13%
Maintenance of sewerage pipes and treatment works	29%	0%	44%	-15%
Cleaning wastewater properly before release back into environment	14%	-5%	40%	-26%
Minimising sewer flooding	21%	2%	39%	-18%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and South West including Bristol and Bournemouth Water Base Size: 48

# Executive Summary

## Overview of Key Findings



The voice for water consumers  
Llais defnyddwyr dŵr

### Barometer

- Negative value for money perceptions remain, suggesting a strong opportunity to improve through clearer, more proactive communication on where money is being spent.
- Satisfaction with all sewerage metrics is below the industry total. Opportunity for South West Water to investigate and understand why performance is poorer in this area.

### Spotlight

- Opportunity to more clearly clarify when drought orders are in place and how customers should respond to them.
- Clear opportunity to address perceptions of poor communication when it comes to drought.

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

**6.00/10 vs 6.57/10 (Total)**

**Why do South West Water customers feel this way?**

Day-to-day water supply and quality are generally reliable, with positive experiences when customers interact directly with customer service teams. Value for money and transparency, alongside far stronger performance and communication on environmental protection, sewage discharges, and how rising bills are being reinvested are areas that could be improved.



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

Total Base Size: 822  
South West Water including Bristol Water  
and Bournemouth Water  
Base Size: 48





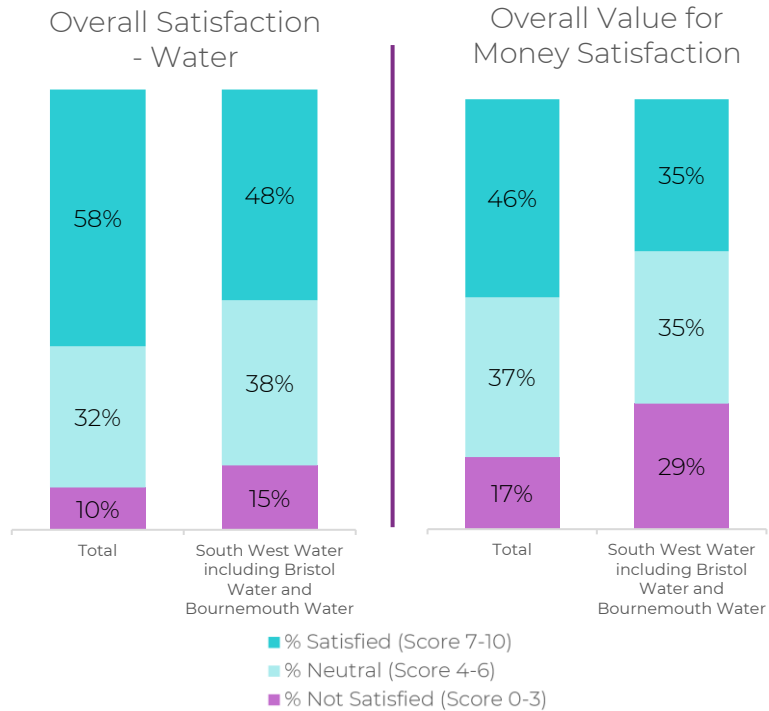
# South West Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

48% are satisfied with South West Water overall  
15% are not satisfied

35% are satisfied with value for money  
29% are not satisfied



Satisfaction and value for money satisfaction remain consistent, despite the industry total increasing this wave. High levels of value for money dissatisfaction remain with 29% not satisfied (28% in November).

## Why have you given this overall satisfaction score on water?

*"I do not trust South West Water. They put shareholders ahead of customers and the public and their record fixing leaks around us is dreadful"*

*Male, 78, lives with partner, 2/10 satisfaction score, South West Water*

*"Would like to see more information on what they do in the community etc."*

*Male, 58, lives with partner, 7/10 satisfaction score, Bristol Water*

*"Cheaper bills would be nice, and to stop discharging into rivers and the sea.."*

*Female, 35, lives with partner and children, 7/10 satisfaction score, South West Water*

Negative value for money perceptions remain, suggesting a strong opportunity to improve through clearer, more proactive communication on where money is being spent.

Total Base Size: 822  
South West Water including Bristol Water and Bournemouth Water  
Base Size: 48



# South West Water: Barometer Findings

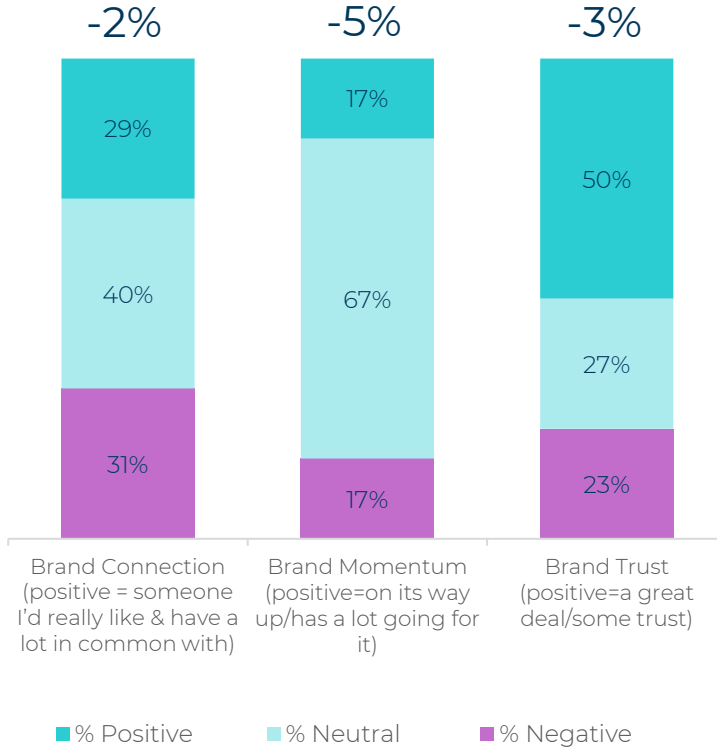
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of South West Water in relation to  
Connection, Momentum & Trust



% Who agree that South West incl. Bristol and Bournemouth Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	46%	0%	-5%
Improves our rivers	33%	+3%	+5%
Creates a greener future	35%	+3%	+3%
Spends customers' money wisely	21%	+2%	-8%
Contributes to our communities	31%	+1%	-8%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	48%	-3%	-10%
Colour & Appearance	90%	+11%	+7%
Taste & Smell	79%	-4%	+2%
Safety of Drinking Water	81%	+6%	+2%
Reliability of Supply	91%	+5%	+4%
Water Pressure	69%	-3%	-8%
<b>Sewerage (South West Water &amp; Isles of Scilly only)</b>			
Overall Satisfaction	21%	-31%	-34%
Reducing smells from sewage treatment works	29%	-4%	-13%
Maintenance of sewerage pipes and treatment works	29%	0%	-15%
Cleaning wastewater properly before release back into environment	14%	-5%	-26%
Minimising sewer flooding	21%	2%	-18%

Satisfaction with all sewerage metrics is below the industry total. Opportunity for South West Water to investigate and understand why performance is poorer in this area.

Total Base Size: 822  
South West Water including Bristol  
Water and Bournemouth Water  
Base Size: 48



# South West Water: Spotlight Findings



52% stated that drought had no impact on them/their household but 38% stated that the amount of water they used reduced in 2025. 67% were not aware of any drought measures being issued in their area.

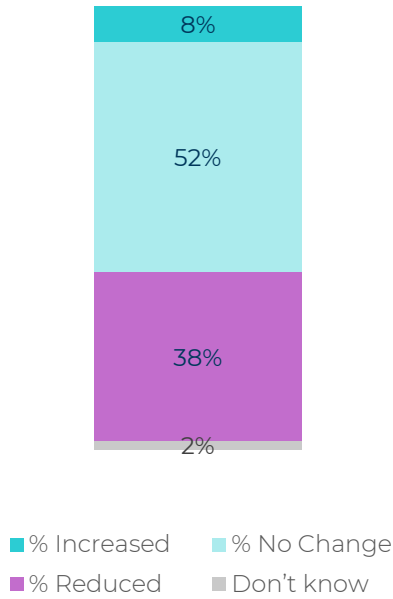
*"I didn't water my grass, but I watered my potted plants when I had enough water in my water butt. I also bought an extra water butt and used a bowl in the kitchen to reuse the washing up water."*

*Female, 66, Lives alone, Bournemouth Water*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	15%
An official drought declaration	2%
A temporary use ban (e.g., hosepipe ban)	10%
A request from my water company to voluntarily reduce water use	17%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	67%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact - 52%
- 2. Affected garden - 29%
- 3. Felt worried about environmental impacts - 23%
- 4. Limitations on outdoor water use (such as washing your car, using drinking water on the garden)- 17%

Opportunity to more clearly clarify when drought orders are in place and how customers should respond to them.

Total Base Size: 822  
South West Water including Bristol Water and Bournemouth Water  
Base Size: 48



# South West Water: Spotlight Findings

## Processes & Resources

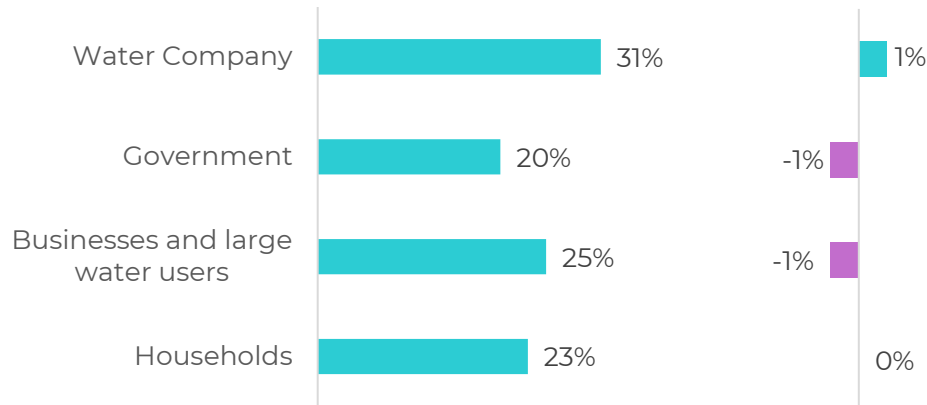


The voice for water consumers  
Llais defnyddwyr dŵr

Water companies are seen as holding the greatest responsibility for reducing water usage, reflecting expectations around infrastructure management and leakage reduction. Businesses and households are seen as sharing a significant role, driven by usage levels and day-to-day behaviour, while government is primarily viewed as an enabler through policy, oversight and long-term planning rather than direct short-term control.

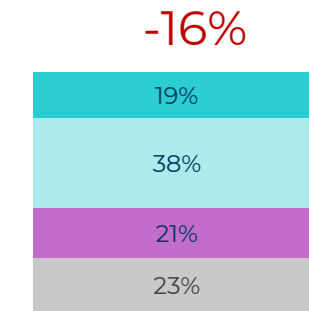
How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

Difference vs Total



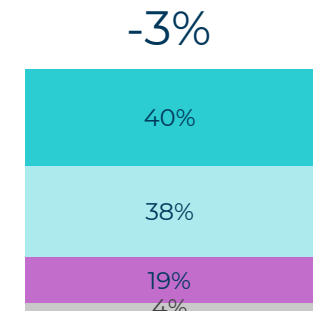
+/- Difference (positive) vs. Current Industry Average

Drought Communication



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that company have effective plans



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

What support could South West Water provide?

1. Clear updates on the current water resource situation in my area 48%
2. Free or discounted water-saving devices (e.g., water butts, shower timers) 40%
3. Tools to help track my water use (e.g., online dashboard, app updates) 29%

Clear opportunity to address perceptions of poor communication when it comes to drought.

Total Base Size: 822  
South West Water including Bristol  
Water and Bournemouth Water  
Base Size: 48



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Southern Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](https://ccw.org.uk)



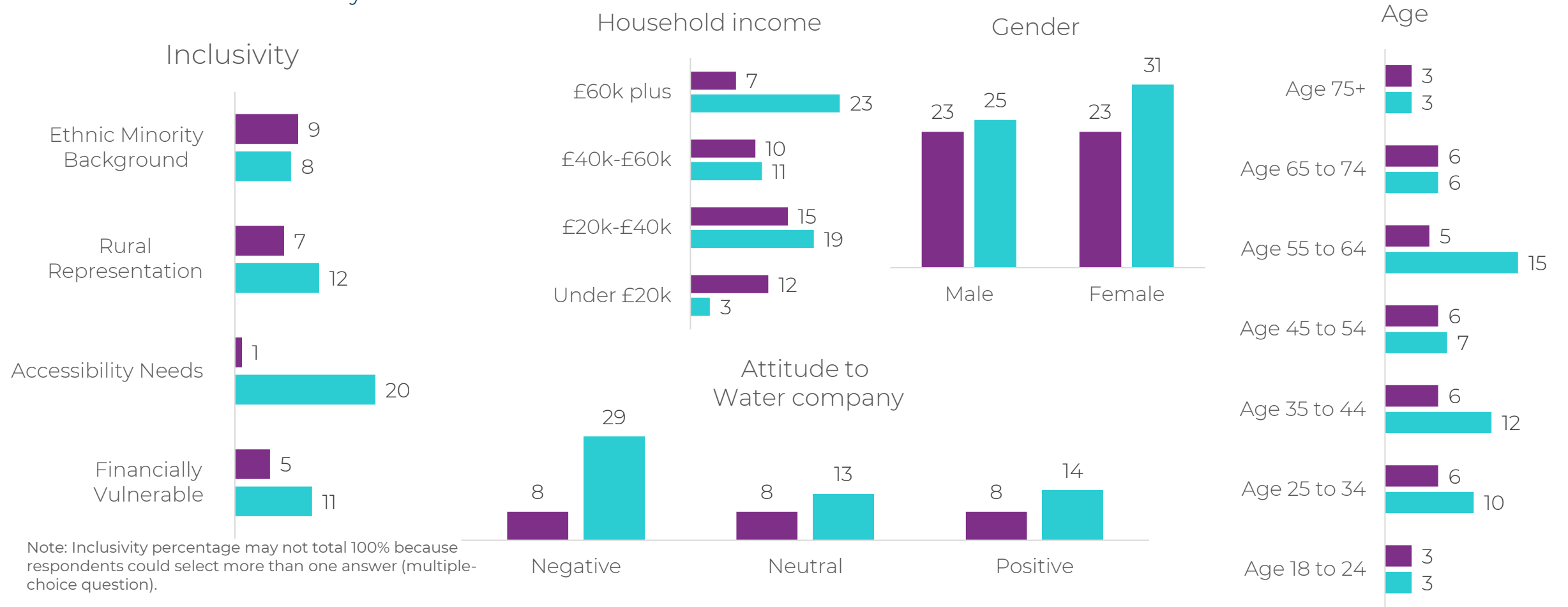
# Southern Water

## Community population



The voice for water consumers  
Llais defnyddwyr dŵr

Southern Water Community members: 56



**Sample note:** We have met over 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the Minimum Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently looking to increase our ethnic minority background sample by at least 1.

Current Sample Minimum Sample

# Dashboard Summary

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



Topic	Dec 2025 Southern Water Community Agreement %	+/- difference % Southern Water Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Southern Water vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	25%	1%	33%	-8%
Recent Experience (Positive recent experience)	25%	3%	46%	-21%
General outlook (Positive outlook)	25%	5%	49%	-24%
Communication (Fair/good communication)	30%	0%	38%	-8%
Brand Connection (someone I'd really like & have a lot in common with)	18%	9%	31%	-13%
Brand Momentum (salience) (on its way up/has a lot going for it)	11%	-3%	22%	-11%
Trust (a great deal/some trust)	30%	10%	53%	-23%
Past 4 Week Interaction	38%	-19%	40%	-2%
Past 4 Week Disruption	2%	-2%	6%	-4%
Past 4 Week Water Quality Issues	4%	2%	6%	-2%
Past 4 Week Sewerage issues	5%	3%	3%	2%
Overall Value for Money	20%	5%	46%	-26%
Overall Satisfaction – Water (satisfied, scoring 7-10)	30%	7%	58%	-28%
Colour & Appearance	79%	-4%	83%	-4%
Taste & Smell	73%	9%	77%	-4%
Safety of Drinking Water	70%	-2%	79%	-9%
Reliability of Supply	91%	8%	87%	4%
Water Pressure	82%	1%	77%	5%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	35%	-5%	55%	-20%
Reducing smells from sewage treatment works	44%	19%	42%	2%
Maintenance of sewerage pipes and treatment works	31%	11%	44%	-13%
Cleaning wastewater properly before release back into environment	31%	13%	40%	-9%
Minimising sewer flooding	29%	11%	39%	-10%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Southern Water Base Size: 56

# Executive Summary

## Overview of Key Findings



### Barometer

- Satisfaction remains low and there are clear opportunities to address ongoing challenges with the service provided, as well as improve perceptions of the company overall.
- Whilst there has been a slight improvement, Southern Water continues to score poorly on almost all water satisfaction metrics. Clear opportunities to address service issues/perception and to improve overall customer sentiment towards the company.

### Spotlight

- Opportunity to educate and reassure customers about Southern Water's role in managing future water shortages and environmental impacts.
- Confidence in Southern Water having effective plans is low. Whilst customers believe that it is the water company's responsibility to reduce water use, they are open to support in the form of free/discounted water saving devices, and clear updates on the water resource situation.

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

**4.89/10 vs 6.57/10 (Total)**

**Why do Southern Water water customers feel this way?**

Southern Water generally delivers reliable day-to-day supply, with some positive experiences of customer service, social tariffs, and a sense that things may be improving after past failures. Bill rises, sewage pollution, slow leak repairs, poor communication, and perceptions of shareholder-first priorities are driving trust and value-for-money concerns.



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

Total Base Size: 822  
Southern Water Base Size: 56



# Southern Water: Barometer Findings

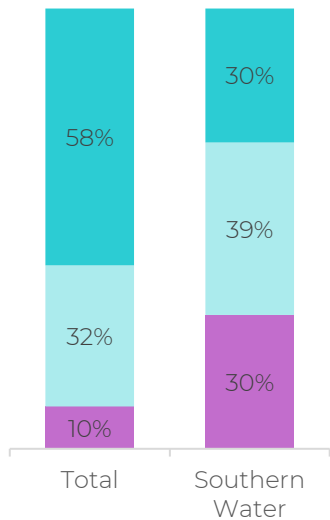


The voice for water consumers  
Llais defnyddwyr dŵr

30% are satisfied with Southern Water overall

30% are not satisfied

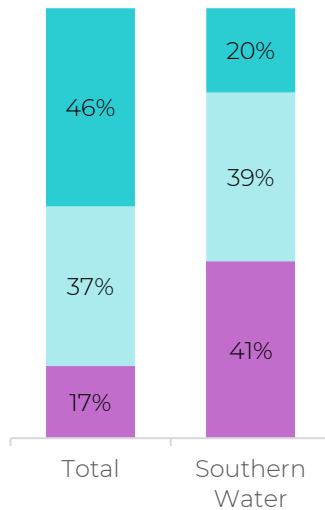
Overall Satisfaction - Water



20% are satisfied with value for money

41% are not satisfied

Overall Value for Money Satisfaction



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

Satisfaction remains considerably lower than the current industry total (-28%). Value for money satisfaction is also low, with 41% of customers stating they are dissatisfied.

## Why have you given this overall satisfaction score on water?

*"They have repeatedly ignored leaks and have the worst customer service I've ever experienced"*

Male, 46,  
Lives alone, 0/10 satisfaction score

*"I dislike how much my bills have gone up and how much pollution they create"*

Female, 29, Lives with children, 3/10 satisfaction score

*"They have maintained a good supply and we've had no issues, however there has been a lot of negative press around them so while it's not a direct impact I'm still not fully satisfied."*

Female, 24, Lives with family member, 7/10 satisfaction score

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

Total Base Size: 822  
Southern Water Base Size: 56



# Southern Water: Barometer Findings

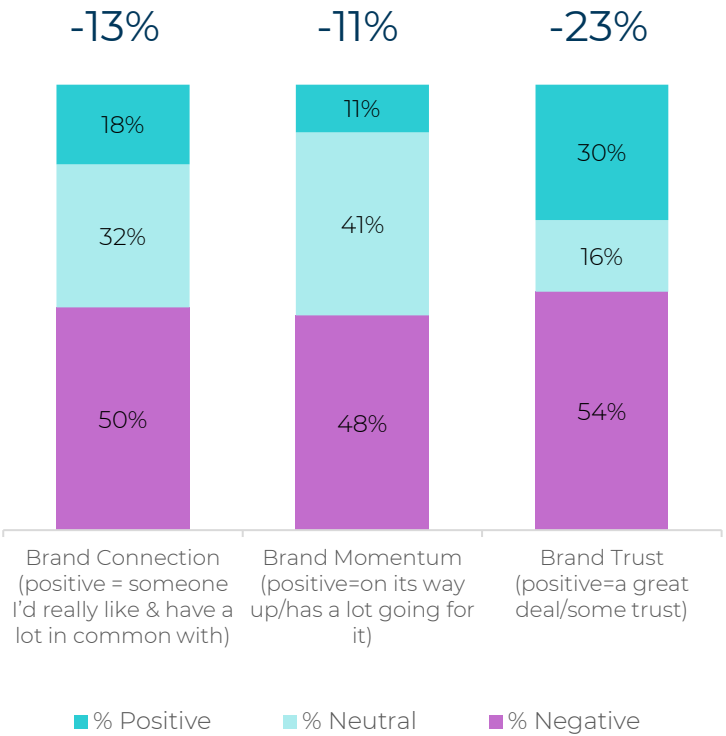
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Southern Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	27%	+6%	-24%
Improves our rivers	18%	+12%	-9%
Creates a greener future	14%	+5%	-18%
Spends customers' money wisely	14%	+6%	-15%
Contributes to our communities	25%	+8%	-14%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	30%	+7%	-28%
Colour & Appearance	79%	-4%	-4%
Taste & Smell	73%	+9%	-4%
Safety of Drinking Water	70%	-2%	-9%
Reliability of Supply	91%	+8%	+4%
Water Pressure	82%	+1%	+5%
<b>Sewerage</b>			
Overall Satisfaction	35%	-5%	-20%
Reducing smells from sewage treatment works	44%	+19%	+2%
Maintenance of sewerage pipes and treatment works	31%	+11%	-13%
Cleaning wastewater properly before release back into environment	31%	+13%	-9%
Minimising sewer flooding	29%	+11%	-10%

Whilst there has been a slight improvement, Southern Water continues to score poorly on almost all water satisfaction metrics. Clear opportunities to address service issues/perception and to improve overall customer sentiment towards the company.

Total Base Size: 822  
Southern Water Base Size: 56





# Southern Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

Just 23% stated that drought had no impact on them/their household. 46% stated that the amount of water they used reduced in 2025. Only 25% were not aware of any measures being issued.

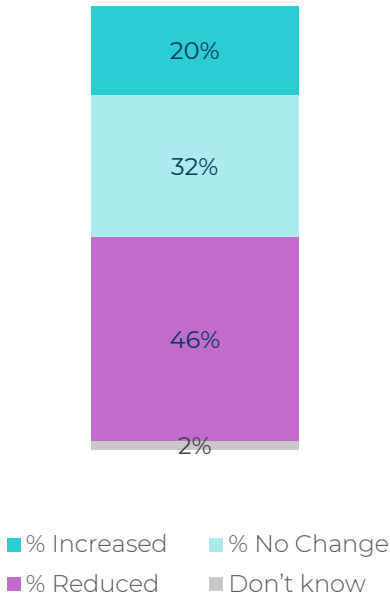
*“We couldn’t water our beautiful garden (and understandably so) and saw it fading/dying before our eyes. I live close to the River Test and it was very worrying to see the water levels so low. I was concerned about wildlife...”*

*Female, 60, Lives with partner*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	32%
An official drought declaration	7%
A temporary use ban (e.g., hosepipe ban)	54%
A request from my water company to voluntarily reduce water use	34%
A non-essential use ban affecting businesses	2%
A drought recovery update (e.g., when restrictions eased)	7%
I am not aware of anything being issued in my area	25%

A temporary use ban in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. Felt worried about future water shortages - 45%
- 2. Felt worried about environmental impacts - 41%
- 3. Affected garden - 32%
- 4. Limitations on outdoor water use (such as washing your car, using drinking water on the garden)- 29%

Opportunity to educate and reassure customers about Southern Waters role in managing future water shortages and environmental impacts.

Total Base Size: 822  
Southern Water Base Size: 56



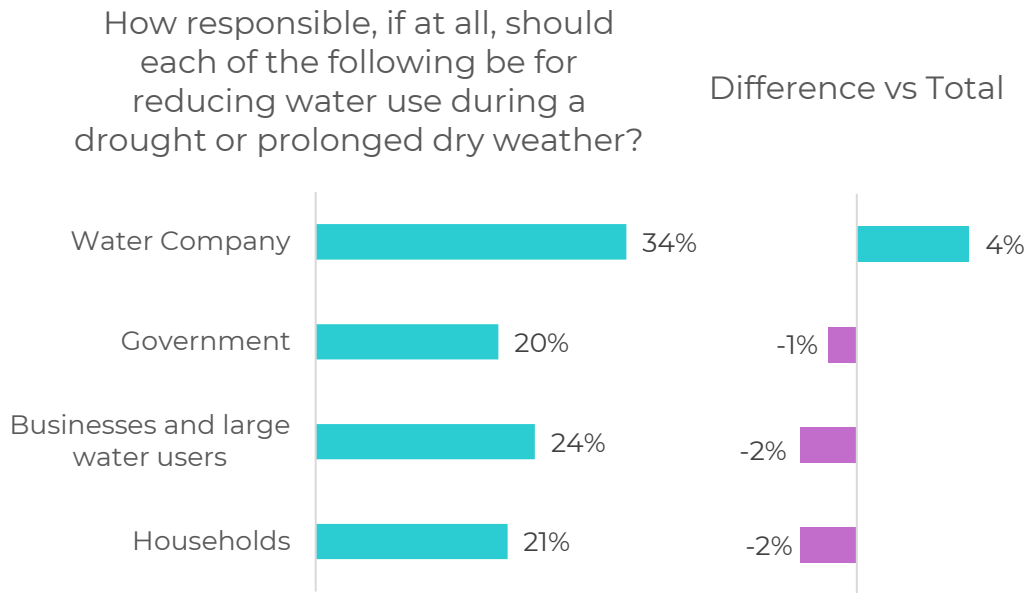
# Southern Water: Spotlight Findings

Drought



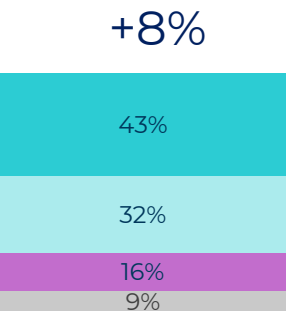
The voice for water consumers  
Llais defnyddwyr dŵr

Water companies are clearly seen as bearing the greatest responsibility for reducing water usage, reflecting expectations around fixing leaks, managing supply and prioritising infrastructure over profits. Businesses and large water users are next, seen as able to deliver bigger efficiency gains due to higher consumption, while households and government are viewed as having a supporting role, rather than a core responsibility for reducing water usage.



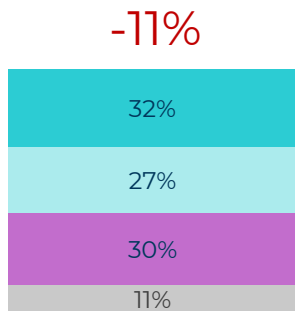
+/- Difference (positive) vs. Current Industry Average

Drought Communication



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that company have effective plans



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

## What support could Southern Water provide?

- Free or discounted water-saving devices (e.g., water butts, shower timers) 45%
- Clear updates on the current water resource situation in my area: 43%
- Tailored support for vulnerable customers, such as bottled water drops if water supply is disrupted: 29%

Confidence in Southern Water having effective drought plans is low. Whilst customers believe that it is the water company's responsibility to reduce water use, they are open to support in the form of free/discounted water saving devices, and clear updates on the water resource situation.

Total Base Size: 822  
Southern Water Base Size: 56



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Thames Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](https://ccw.org.uk)

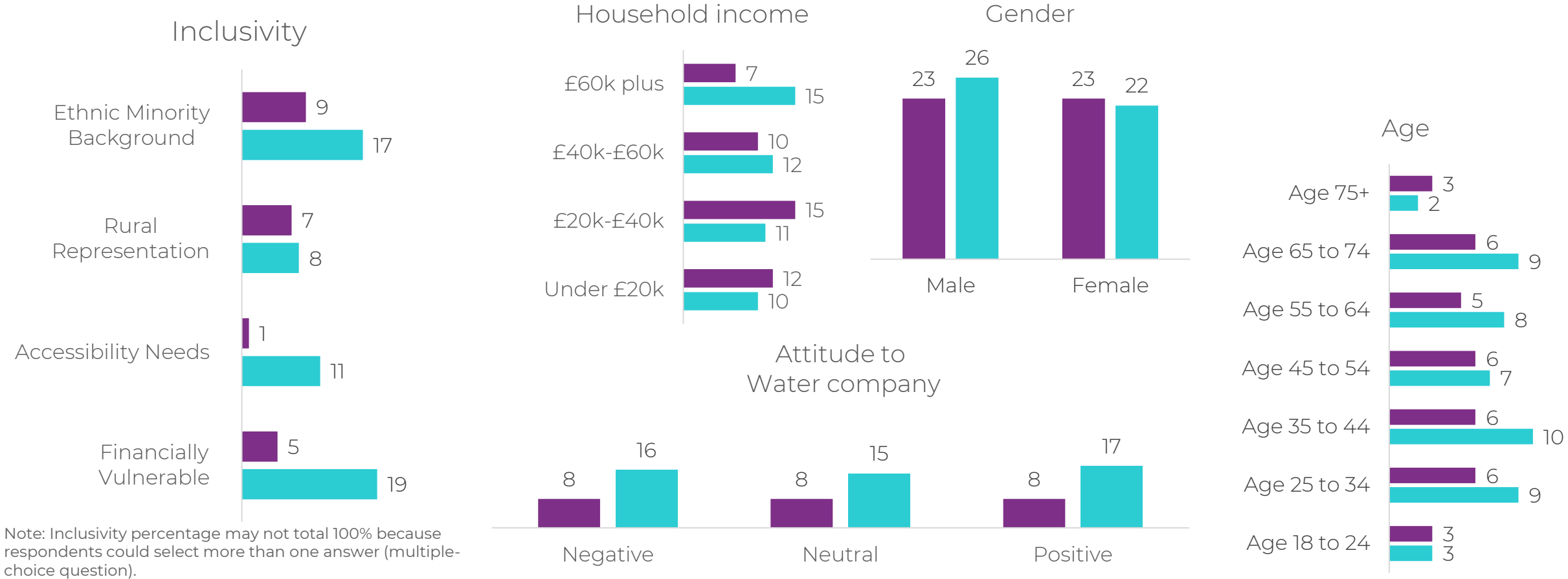
# Thames Water

## Community population



The voice for water consumers  
Llais defnyddwyr dŵr

Thames Water Community members: 48



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

# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 Thames Community Agreement %	+/- difference % Thames Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Thames vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	29%	4%	33%	-4%
Recent Experience (Positive recent experience)	40%	7%	46%	-6%
General outlook (Positive outlook)	35%	4%	49%	-14%
Communication (Fair/good communication)	19%	-14%	38%	-19%
Brand Connection (someone I'd really like & have a lot in common with)	19%	1%	31%	-12%
Brand Momentum (salience) (on its way up/has a lot going for it)	10%	4%	22%	-12%
Trust (a great deal/some trust)	40%	-6%	53%	-13%
Past 4 Week Interaction	42%	0%	40%	2%
Past 4 Week Disruption	6%	2%	6%	0%
Past 4 Week Water Quality Issues	11%	3%	6%	5%
Past 4 Week Sewerage issues	6%	6%	3%	3%
Overall Value for Money	38%	5%	46%	-8%
Overall Satisfaction – Water (satisfied, scoring 7-10)	44%	6%	58%	-14%
Colour & Appearance	69%	-4%	83%	-14%
Taste & Smell	63%	1%	77%	-14%
Safety of Drinking Water	69%	7%	79%	-10%
Reliability of Supply	75%	-9%	87%	-12%
Water Pressure	67%	-6%	77%	-10%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	52%	1%	55%	-3%
Reducing smells from sewage treatment works	38%	5%	42%	-4%
Maintenance of sewerage pipes and treatment works	38%	-8%	44%	-6%
Cleaning wastewater properly before release back into environment	42%	5%	40%	2%
Minimising sewer flooding	42%	9%	39%	3%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Thames Water Base Size: 48



# Executive Summary

## Overview of Key Findings



The voice for water consumers  
Llais defnyddwyr dŵr

### Barometer

- Inconsistent customer experiences, but there are positive customer experiences that Thames Water can look to replicate and build on.
- Thames Water retains lower brand scores than the industry average. Momentum (salience) is the key challenge, and the brand has a strong opportunity to address current negative perceptions and overall water satisfaction.

### Spotlight

- Lack of consistent customer awareness about water usage restrictions highlights an opportunity for Thames to more consistently communicate with customers about the current water resource situation and any required actions.
- Opportunity for Thames Water to be proactive in communicating the water resource situation, and the drought plans they have in place, to improve consumer confidence.

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

**5.56/10 vs 6.57/10 (Total)**

### Why do Thames Water customers feel this way?

Day-to-day water supply is reliable, with many reporting clean water, few disruptions, and positive experiences when customer service is actually involved (including support schemes and helpful engineers). Rising bills, recurring leaks, sewage pollution, poor communication, and concerns about governance and investment are driving dissatisfaction.



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

Total Base Size: 822  
Thames Water Base Size: 48



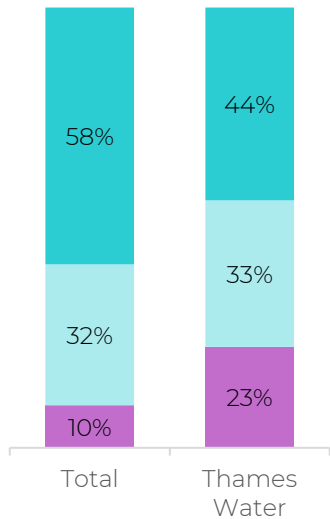
# Thames Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

44% are satisfied with Thames Water overall  
23% are not satisfied

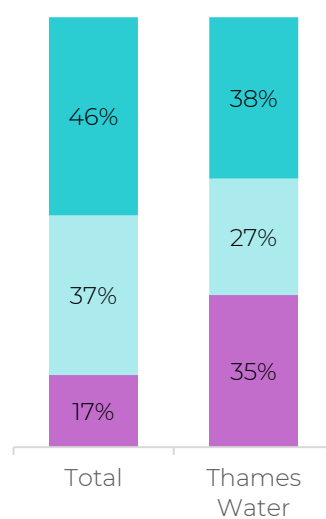
Overall Satisfaction - Water



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

38% are satisfied with value for money  
35% are not satisfied

Overall Value for Money Satisfaction



Whilst satisfaction is up on the November wave, it is below industry total (which has also increased) and dissatisfaction is relatively high, both generally and in relation to value for money.

## Why have you given this overall satisfaction score on water?

*"My water bill has gone up massively this year but I don't see the money spend wisely. Directors dividend payments, leaks everywhere and polluting our rivers."*

Male, 72,  
Lives with partner, 1/10 satisfaction score

*"I contacted them to advise that I have a heart condition which I was diagnosed with last year and they put me on their vulnerable register and reduced my bill."*

Female, 60, Lives with partner and children, 10/10 satisfaction score

*"They don't do enough for us as customers but quick enough to double our bill"*

Female, 31, Lives with family member, 4/10 satisfaction score

Inconsistent customer experiences, but there are positive customer experiences that Thames Water can look to replicate and build on.

Total Base Size: 822  
Thames Water Base Size: 48



# Thames Water: Barometer Findings

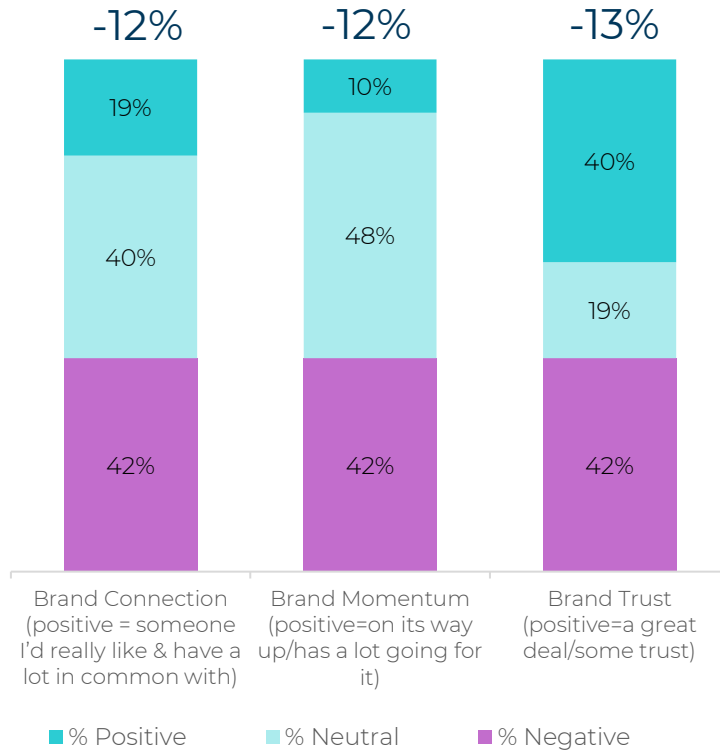
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Thames Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	35%	-5%	-15%
Improves our rivers	21%	-1%	-7%
Creates a greener future	27%	+11%	-6%
Spends customers' money wisely	23%	+5%	-6%
Contributes to our communities	31%	+11%	+4%
% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	44%	6%	-14%
Colour & Appearance	69%	-4%	-14%
Taste & Smell	63%	1%	-14%
Safety of Drinking Water	69%	7%	-10%
Reliability of Supply	75%	-9%	-12%
Water Pressure	67%	-6%	-10%
<b>Sewerage</b>			
Overall Satisfaction	52%	1%	-3%
Reducing smells from sewage treatment works	38%	5%	-4%
Maintenance of sewerage pipes and treatment works	38%	-8%	-6%
Cleaning wastewater properly before release back into environment	42%	5%	+2%
Minimising sewer flooding	42%	9%	+3%

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

Total Base Size: 822  
Thames Water Base Size: 48



# Thames Water: Spotlight Findings



48% of customers stated that the amount of water they used reduced in 2025. Just 38% stated that drought had no impact on them or their household and 44% had no awareness of any drought related orders.

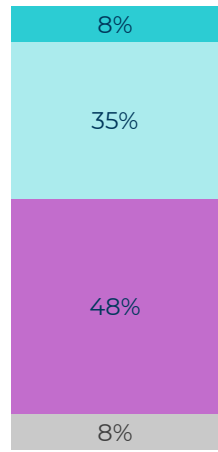
*“Slight reduction in water pressure and recycled water to use in the garden. More guarded then usual about running the tap till the water heated up so switched to heating water when needed in the kettle”*

*Female, 68, Lives alone*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	23%
An official drought declaration	4%
A temporary use ban (e.g., hosepipe ban)	33%
A request from my water company to voluntarily reduce water use	29%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	6%
I am not aware of anything being issued in my area	44%

A temporary use ban was in place in 2025

2025 Water Usage Changes



■ % Increased    ■ % No Change  
■ % Reduced    ■ Don't know

In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact – 38%
- 2. Affected garden - 29%
- 3. Needed to reduce water use at home – 27%
- 4. Felt worried about environmental impacts - 25%

Lack of consistent customer awareness about water usage restrictions highlights an opportunity for Thames to more consistently communicate with customers about the current water resource situation and any required actions.



# Thames Water: Spotlight Findings

## Processes & Resources

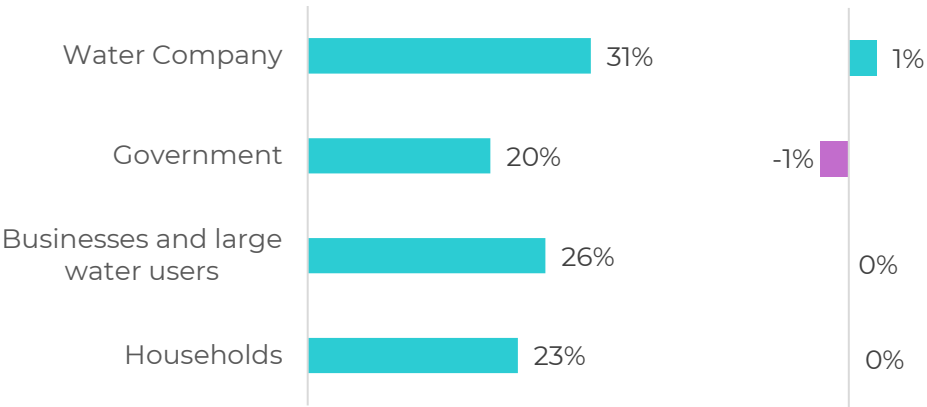


The voice for water consumers  
Llais defnyddwyr dŵr

Water companies are seen as most responsible for reducing water usage during drought, which aligns with the industry standard and reflects expectations around fixing leaks, managing supply and planning for drought. They are followed by businesses and large water users, viewed as capable of making the biggest reductions due to higher consumption, while households are viewed as playing a more supporting role, with a limit on what they can realistically do.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

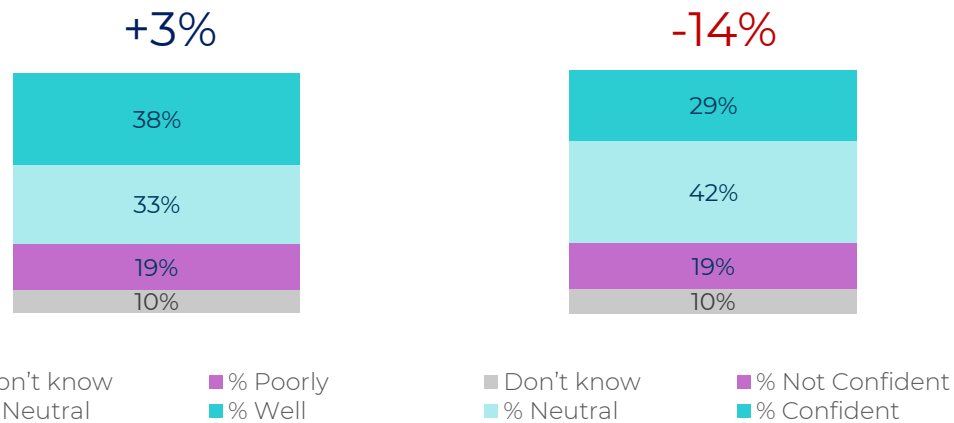
Difference vs Total



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

Drought Communication

Confidence that company have effective plans



What support could Thames Water provide?

1. Clear updates on the current water resource situation in my area: 44%
2. Early warning messages when dry weather conditions begin: 38%
3. Free or discounted water-saving devices (e.g., water butts, shower timers) 38%

Opportunity for Thames Water to be proactive in communicating the water resource situation, and the drought plans they have in place, to improve consumer confidence.





The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**United Utilities**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

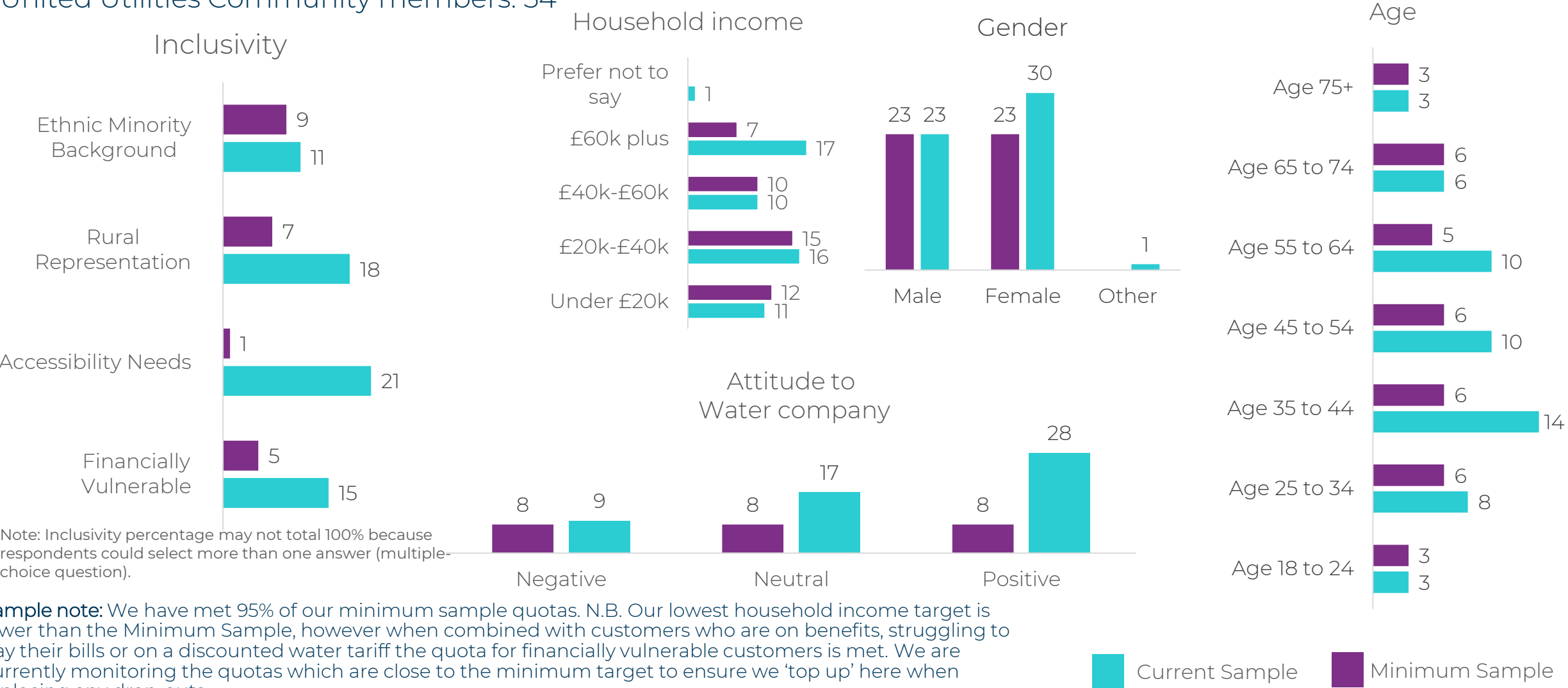
[ccw.org.uk](http://ccw.org.uk)

# United Utilities

Community population



United Utilities Community members: 54



# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 United Utilities Community Agreement %	+/- difference % United Utilities Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % United Utilities vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	32%	-3%	33%	-1%
Recent Experience (Positive recent experience)	48%	-2%	46%	2%
General outlook (Positive outlook)	52%	-3%	49%	3%
Communication (Fair/good communication)	39%	1%	38%	1%
Brand Connection (someone I'd really like & have a lot in common with)	30%	11%	31%	-1%
Brand Momentum (salience) (on its way up/has a lot going for it)	26%	4%	22%	4%
Trust (a great deal/some trust)	59%	16%	53%	6%
Past 4 Week Interaction	37%	-2%	40%	-3%
Past 4 Week Disruption	7%	5%	6%	1%
Past 4 Week Water Quality Issues	9%	5%	6%	3%
Past 4 Week Sewerage issues	0%	-2%	3%	-3%
Overall Value for Money	43%	13%	46%	-3%
Overall Satisfaction – Water (satisfied, scoring 7-10)	61%	7%	58%	3%
Colour & Appearance	83%	3%	83%	0%
Taste & Smell	72%	5%	77%	-5%
Safety of Drinking Water	74%	4%	79%	-5%
Reliability of Supply	85%	-4%	87%	-2%
Water Pressure	76%	2%	77%	-1%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	57%	5%	55%	2%
Reducing smells from sewage treatment works	49%	20%	42%	7%
Maintenance of sewerage pipes and treatment works	47%	4%	44%	3%
Cleaning wastewater properly before release back into environment	43%	5%	40%	3%
Minimising sewer flooding	42%	8%	39%	3%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and United Utilities Base Size: 54

# Executive Summary

## Overview of Key Findings



The voice for water consumers  
Llais defnyddwyr dŵr

### Barometer

- Unexplained billing increases, leaks and pollution are key areas that need addressing to improve satisfaction further.
- United Utilities continue to perform in line with the industry average. Brand Trust and Momentum remain positive.

### Spotlight

- With 20% of customers believing a temporary usage ban was in place, there is an opportunity to improve consistency of understanding of actions and measures that customers should be taking.
- Opportunity to improve overall drought communication and demonstrate how United Utilities are working to mitigate the impact of drought in their region.

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

**6.43/10 vs 6.57/10 (Total)**

### Why do United Utilities customers feel this way?

United Utilities delivers reliable day-to-day supply, with generally good pressure, acceptable water quality for many, easy contact when needed, and few major disruptions. But bills are seen as high and rising with little explanation, leaks and river pollution worry people, and many feel disconnected from what the company is doing beyond basic service delivery.



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

Total Base Size: 822  
United Utilities Base Size: 54



# United Utilities: Barometer Findings

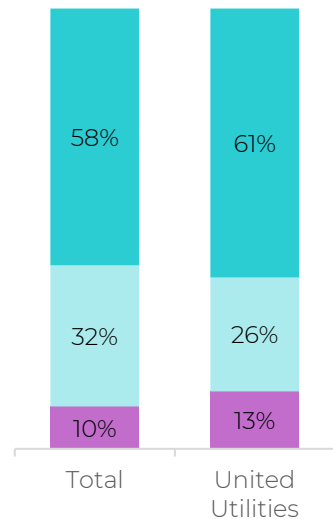


The voice for water consumers  
Llais defnyddwyr dŵr

61% are satisfied with United Utilities overall

13% are not satisfied

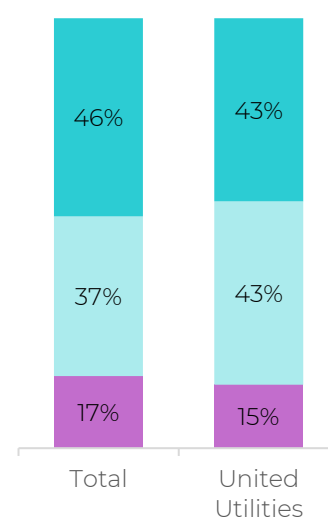
Overall Satisfaction - Water



43% are satisfied with value for money

15% are not satisfied

Overall Value for Money Satisfaction



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

Overall satisfaction is in line with the industry average but the percentage of customers saying they are dissatisfied has increased slightly on the November wave. Value for money satisfaction is in line with the industry total, with marginally lower dissatisfaction.

## Why have you given this overall satisfaction score on water?

*"Experiencing high water usage and have questioned our water meter. Water company said they would organise checks for us but this has not happened."*

*Female, 60,  
Lives with partner & children,  
3/10 satisfaction score*

*"My water quality and pressure is of good quality almost all the time. If I need to contact my water provider it is easy to do so"*

*Male, 55, Lives with  
partner/spouse & Children,  
8/10 satisfaction score*

*"Water bills increase, not entirely sure why..."*

*Male, 28, Lives alone, 5/10  
satisfaction score*

Unexplained billing increases, leaks and pollution are key areas that need addressing to improve satisfaction further.

Total Base Size: 822  
United Utilities Base Size: 54





# United Utilities: Barometer Findings

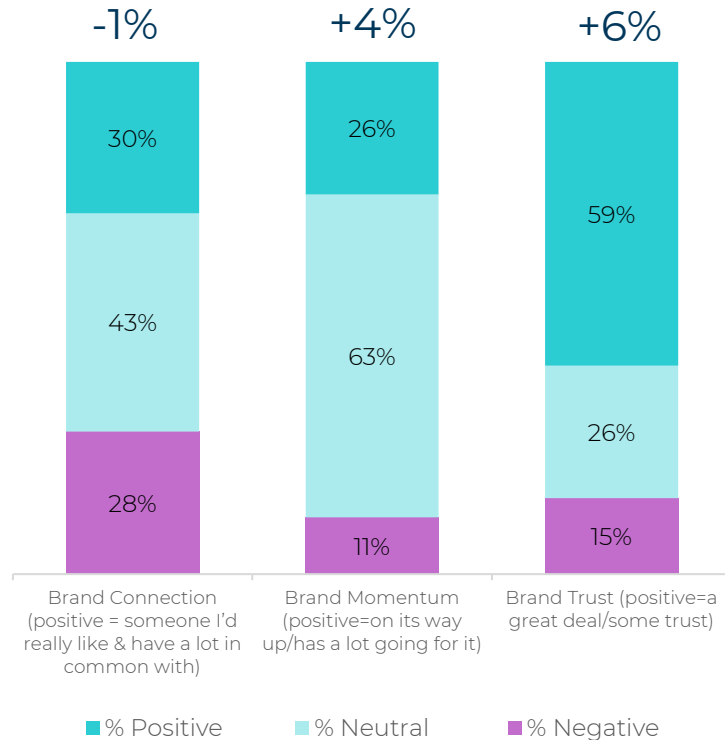
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that United Utilities...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	54%	+15%	+3%
Improves our rivers	28%	+9%	0%
Creates a greener future	39%	+20%	+6%
Spends customers' money wisely	22%	+9%	-7%
Contributes to our communities	41%	+4%	+2%
% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	61%	+7%	+3%
Colour & Appearance	83%	+3%	0%
Taste & Smell	72%	+5%	-5%
Safety of Drinking Water	74%	+4%	-5%
Reliability of Supply	85%	-4%	-2%
Water Pressure	76%	+2%	-1%
<b>Sewerage</b>			
Overall Satisfaction	57%	+5%	+2%
Reducing smells from sewage treatment works	49%	+20%	+7%
Maintenance of sewerage pipes and treatment works	47%	+4%	+3%
Cleaning wastewater properly before release back into environment	43%	+5%	+3%
Minimising sewer flooding	42%	+8%	+3%

United Utilities continue to perform in line with the industry average. Brand Trust and Momentum remain positive.

Total Base Size: 822  
United Utilities Base Size: 54



# United Utilities: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

48% of customers stated that the amount of water they used reduced in 2025. 52% stated that drought had no impact on them or their household and 50% had no awareness of any drought related orders.

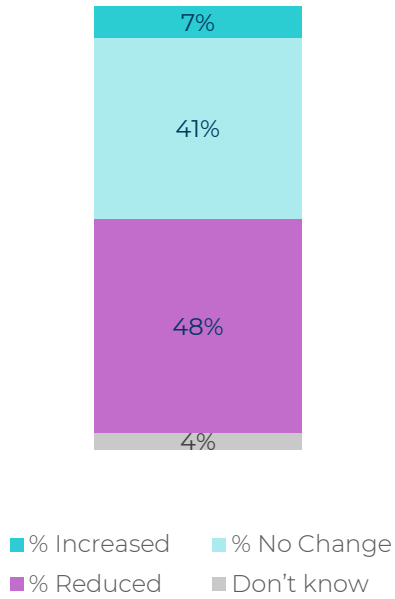
*"I have had no impact of this at all in 2025. I'm unaware of any issues and feel if any they haven't been communicated to me."*

*Female, 28, Lives with partner*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	20%
An official drought declaration	5%
A temporary use ban (e.g., hosepipe ban)	20%
A request from my water company to voluntarily reduce water use	27%
A non-essential use ban affecting businesses	2%
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	50%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact – 52%
- 2. Felt worried about environmental impacts - 23%
- 3. Affected garden - 18%
- 4. Felt worried about environmental impacts (e.g., low river or reservoir levels, effects on wildlife) – 13%

With 20% of customers believing a temporary usage ban was in place, there is an opportunity to improve consistency of understanding of actions and measures that customers should be taking.



# United Utilities: Spotlight Findings

## Drought

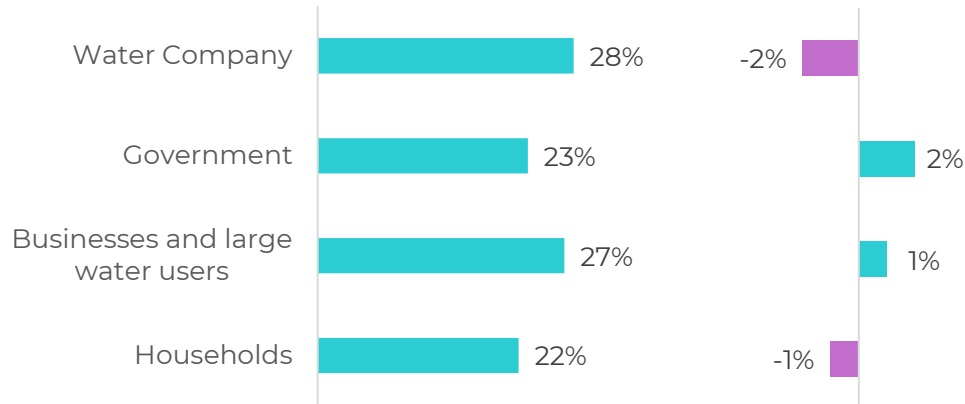


The voice for water consumers  
Llais defnyddwyr dŵr

For United Utilities customers, water companies are seen as carrying the greatest responsibility for reducing water use, reflecting expectations around managing supply, fixing leaks and leading communication during droughts. They are followed closely by businesses and large water users, viewed as having greater capacity to reduce consumption at scale, while government and households are seen as playing a more supporting role through regulation and responsible day-to-day use rather than driving change.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

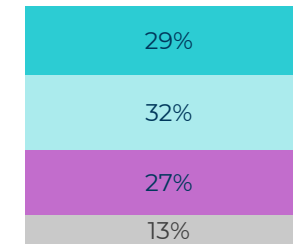
Difference vs Total



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

Drought Communication

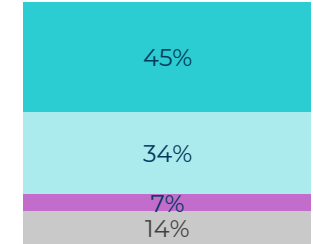
-6%



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that company have effective plans

+2%



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

What support could United Utilities provide?

1. Clear updates on the current water resource situation in my area: 44%
2. Early warning messages when dry weather conditions begin: 38%
3. Free or discounted water-saving devices (e.g., water butts, shower timers) 38%

Opportunity to improve overall drought communication and demonstrate how United Utilities are working to mitigate the impact of drought in their region.

Total Base Size: 822  
United Utilities Base Size: 54



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Wessex Water**

December 2025

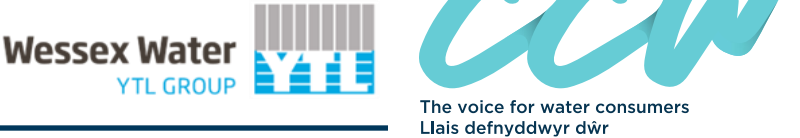
Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

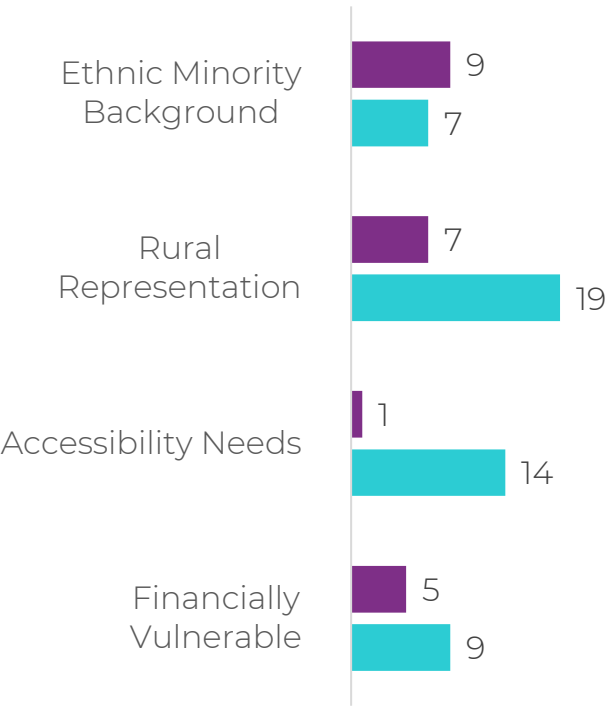
# Wessex Water

Community population



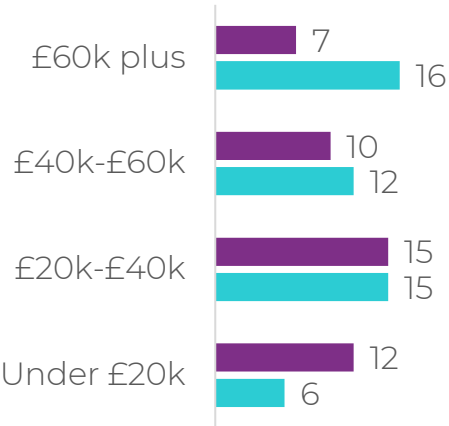
Wessex Water Community members: 49

Inclusivity

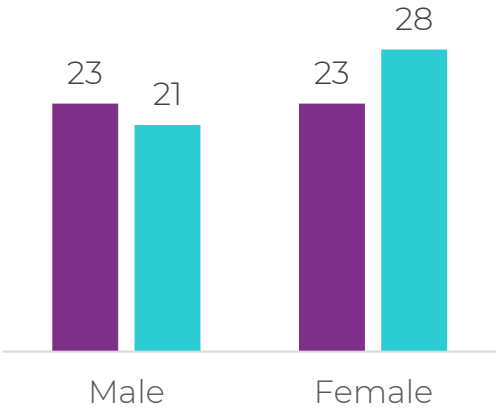


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

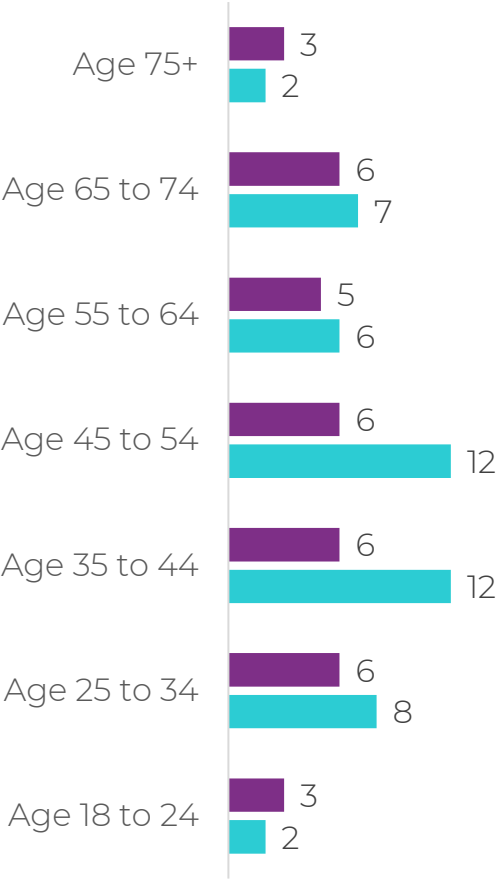
Household income



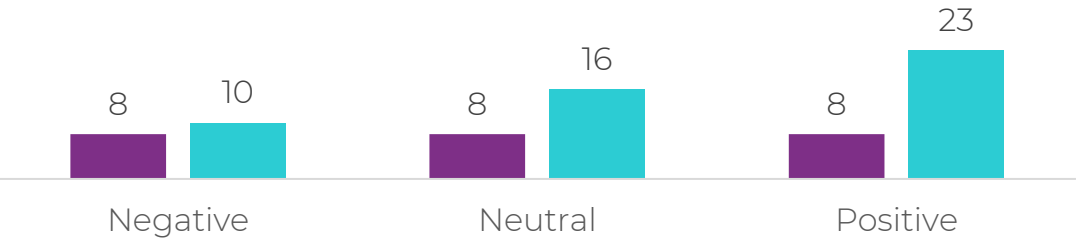
Gender



Age



Attitude to Water company



**Sample note:** We have met over 90% of our sample target quotas. Our lowest household income target is lower than the Minimum Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we ‘top up’ here when replacing any drop-outs.



# Dashboard Summary

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

Wessex Water  
YTL GROUP



The voice for water consumers  
Llais defnyddwyr dŵr

Topic	Dec 2025 Wessex Community Agreement %	+/- difference % Wessex Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Wessex vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	29%	7%	33%	-4%
Recent Experience (Positive recent experience)	51%	5%	46%	5%
General outlook (Positive outlook)	47%	4%	49%	-2%
Communication (Fair/good communication)	47%	8%	38%	9%
Brand Connection (someone I'd really like & have a lot in common with)	33%	9%	31%	2%
Brand Momentum (salience) (on its way up/has a lot going for it)	27%	19%	22%	5%
Trust (a great deal/some trust)	63%	19%	53%	10%
Past 4 Week Interaction	35%	4%	40%	-5%
Past 4 Week Disruption	8%	1%	6%	2%
Past 4 Week Water Quality Issues	4%	-6%	6%	-2%
Past 4 Week Sewerage issues	0%	-2%	3%	-3%
Overall Value for Money	37%	1%	46%	-9%
Overall Satisfaction – Water (satisfied, scoring 7-10)	61%	21%	58%	3%
Colour & Appearance	90%	4%	83%	7%
Taste & Smell	78%	-1%	77%	1%
Safety of Drinking Water	76%	-3%	79%	-3%
Reliability of Supply	90%	2%	87%	3%
Water Pressure	84%	13%	77%	7%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	60%	10%	55%	5%
Reducing smells from sewage treatment works	38%	14%	42%	-4%
Maintenance of sewerage pipes and treatment works	44%	18%	44%	0%
Cleaning wastewater properly before release back into environment	42%	25%	40%	2%
Minimising sewer flooding	42%	28%	39%	3%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Wessex Water Base Size: 49

# Executive Summary

## Overview of Key Findings



### Barometer

- Proactively communicating with customers and explaining price rises and investment plans will help improve value for money for money satisfaction.
- Trust in Wessex Water has risen notably since November, reflecting positive momentum. To sustain this improvement, focus on proactive communication and greater transparency about environmental initiatives.

### Spotlight

- Lack of consistent customer awareness about water usage restrictions highlights an opportunity for Wessex Water to communicate more consistently with customers about the current water resource situation and any required actions.
- Opportunity to be proactive in providing clear updates on the current water resource situation, as well as communicate practical water savings tips to customers.

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

**6.59/10 vs 6.57/10 (Total)**

## Why do Wessex Water customers feel this way?

Wessex Water delivers reliable supply, responsive customer service when needed and acceptable water quality. But high bills, river/sewage concerns, hard water, frequent roadworks, and limited proactive communication or clarity on investment and priorities are impacting satisfaction.



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

Total Base Size: 822  
Wessex Water Base Size: 49



# Wessex Water: Barometer Findings

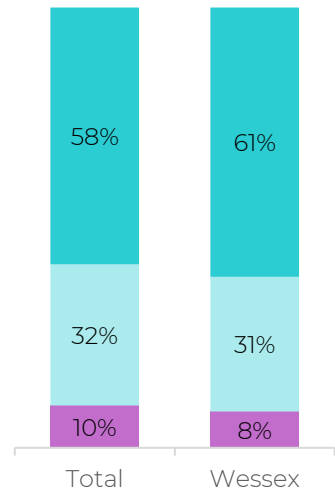


The voice for water consumers  
Llais defnyddwyr dŵr

61% are satisfied with  
Wessex Water overall

8% are not satisfied

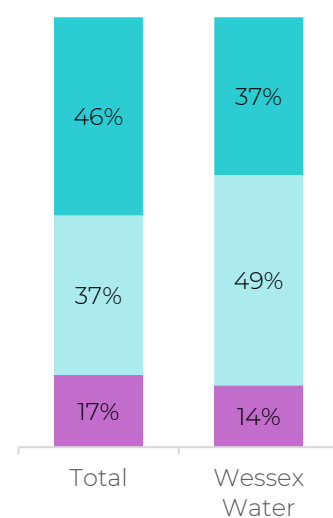
Overall Satisfaction  
- Water



37% are satisfied with  
value for money

14% are not satisfied

Overall Value for  
Money Satisfaction



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

Satisfaction is now on par with the industry average, but value for money satisfaction is lower, with a large amount of neutral sentiment.

Customers generally feel Wessex Water provides a reliable, good quality service, but there are concerns about high bills, sewage spills and lack of proactive communication.

## Why have you given this overall satisfaction score on water?

*"We mostly have no issues with supply, customer services with bill enquiries is always good"*

*Female, 40,  
Lives with partner, 6/10  
satisfaction score*

*"WW needs to stop using rivers and the coastline as an adjunct to its sewers"*

*Male, 66, Lives with partner,  
Wessex Water, 1/10  
satisfaction score*

*"I was previously a 5 but we had a burst water main right outside our house the Wessex Water staff were brilliant and did their best to keep the disruption to a minimum"*

*Female, 57, Lives with  
partner/spouse, 7/10  
satisfaction score*

Proactively communicating with customers and explaining price rises and investment will help improve value for money for money satisfaction.

Total Base Size: 822  
Wessex Water Base Size: 49



# Wessex Water: Barometer Findings

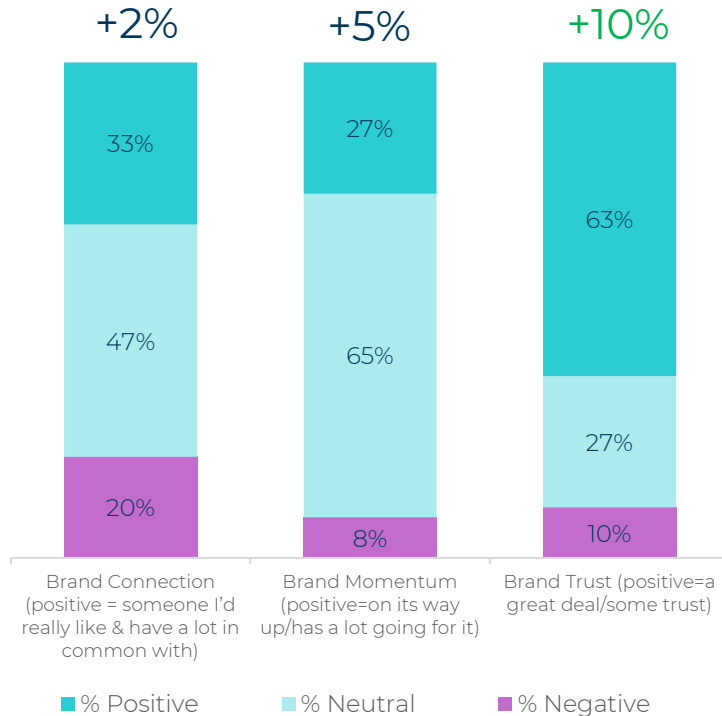
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Wessex Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	57%	+21%	+6%
Improves our rivers	14%	-3%	-14%
Creates a greener future	25%	+11%	-8%
Spends customers' money wisely	14%	+4%	-15%
Contributes to our communities	35%	+16%	-4%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	61%	+21%	+3%
Colour & Appearance	90%	+4%	+7%
Taste & Smell	78%	-1%	+1%
Safety of Drinking Water	76%	-3%	-3%
Reliability of Supply	90%	+2%	+3%
Water Pressure	84%	+13%	+7%
<b>Sewerage</b>			
Overall Satisfaction	60%	+10%	+5%
Reducing smells from sewage treatment works	38%	+14%	-4%
Maintenance of sewerage pipes and treatment works	44%	+18%	0%
Cleaning wastewater properly before release back into environment	42%	+25%	+2%
Minimising sewer flooding	42%	+28%	+3%

Trust in Wessex Water has risen notably since November, reflecting positive momentum. To sustain this improvement, focus on proactive communication and greater transparency about environmental initiatives.

Total Base Size: 822  
Wessex Water Base Size: 49



# Wessex Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

47% of customers stated that the amount of water they used reduced in 2025. 39% stated that drought had no impact on them or their household and 55% had no awareness of any drought related orders being in place.

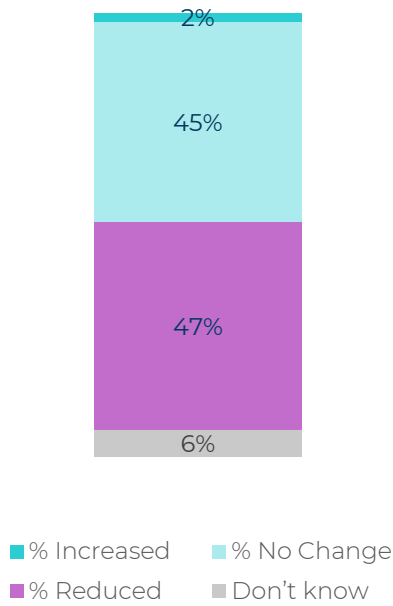
*“Husband likes to keep garden watered twice a day for 5 minutes on a timer. We responded by stopping this, grass soon recovered with subsequent rain.”*

*Female, 73, Lives with partner*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	18%
An official drought declaration	6%
A temporary use ban (e.g., hosepipe ban)	14%
A request from my water company to voluntarily reduce water use	29%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	55%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact – 39%
- 2. Felt worried about environmental impacts (e.g., low river or reservoir levels, effects on wildlife) - 37%
- 3. Affected garden - 37%



# Wessex Water: Spotlight Findings

Drought

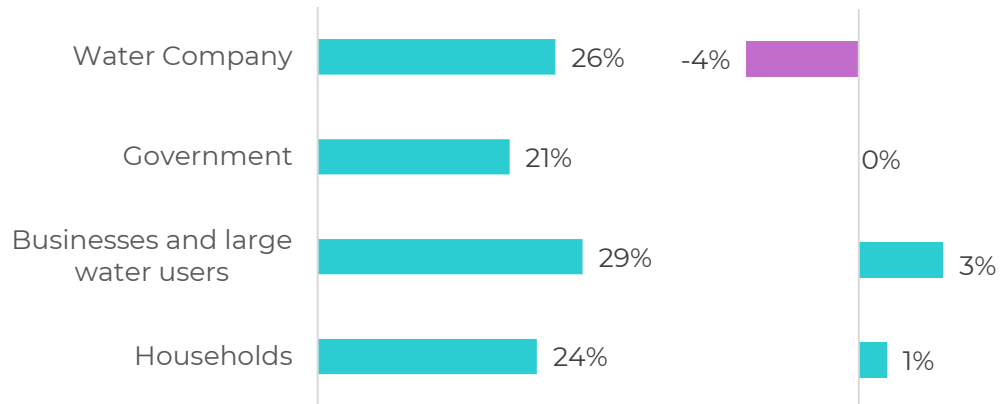


The voice for water consumers  
Llais defnyddwyr dŵr

Businesses and large water users are seen as carrying the greatest responsibility for reducing water usage, reflecting their higher consumption and ability to deliver larger-scale reductions. Water companies are close behind, expected to manage supply, fix leaks and lead communication, while households and government are viewed as having a supporting role, contributing through everyday behaviour and policy rather than driving change on their own.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

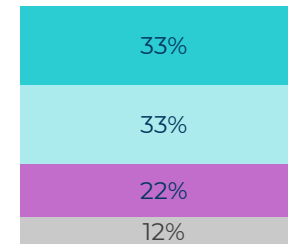
Difference vs Total



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

Drought Communication

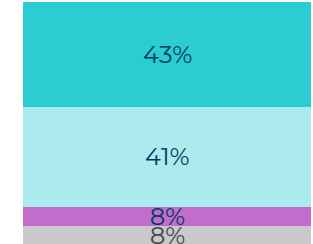
-2%



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that company have effective plans

0%



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

What support could Wessex Water provide?

1. Clear updates on the current water resource situation in my area: 49%
2. Practical water-saving tips tailored to households: 37%
3. Free or discounted water-saving devices (e.g., water butts, shower timers) 33%

Opportunity to be proactive in providing clear updates on the current water resource situation, as well as communicating practical water savings tips to customers.

Total Base Size: 822  
Wessex Water Base Size: 49





The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Yorkshire Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

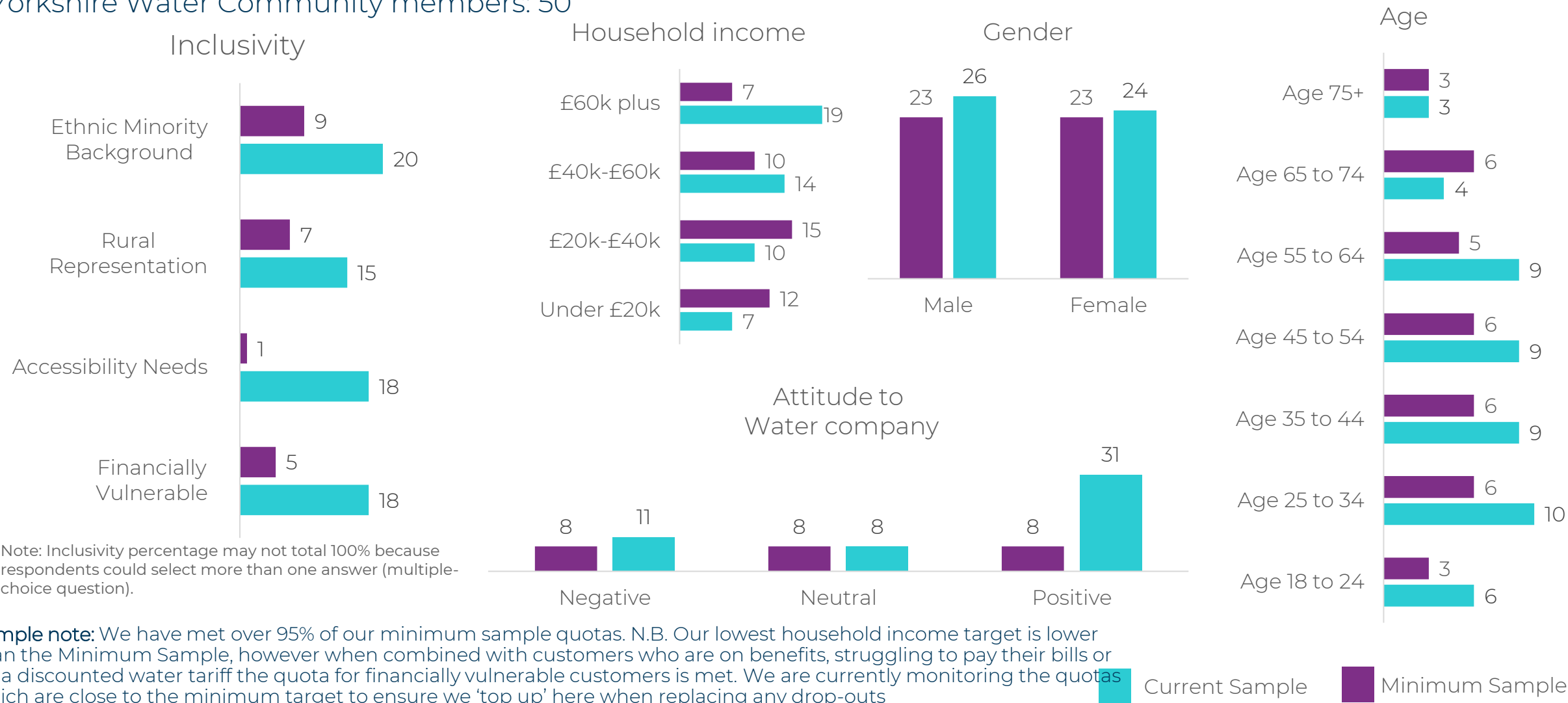
[ccw.org.uk](http://ccw.org.uk)

# Yorkshire Water

Community population



Yorkshire Water Community members: 50



# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 Yorkshire Community Agreement %	+/- difference % Yorkshire Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Yorkshire vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	38%	11%	33%	5%
Recent Experience (Positive recent experience)	52%	10%	46%	6%
General outlook (Positive outlook)	62%	13%	49%	13%
Communication (Fair/good communication)	46%	8%	38%	8%
Brand Connection (someone I'd really like & have a lot in common with)	32%	10%	31%	1%
Brand Momentum (salience) (on its way up/has a lot going for it)	24%	0%	22%	2%
Trust (a great deal/some trust)	48%	6%	53%	-5%
Past 4 Week Interaction	66%	15%	40%	26%
Past 4 Week Disruption	16%	16%	6%	10%
Past 4 Week Water Quality Issues	4%	0%	6%	-2%
Past 4 Week Sewerage issues	6%	6%	3%	3%
Overall Value for Money	54%	12%	46%	8%
Overall Satisfaction – Water (satisfied, scoring 7-10)	54%	10%	58%	-4%
Colour & Appearance	90%	6%	83%	7%
Taste & Smell	80%	-2%	77%	3%
Safety of Drinking Water	88%	1%	79%	9%
Reliability of Supply	84%	0%	87%	-3%
Water Pressure	72%	-6%	77%	-5%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	65%	14%	55%	10%
Reducing smells from sewage treatment works	52%	12%	42%	10%
Maintenance of sewerage pipes and treatment works	54%	16%	44%	10%
Cleaning wastewater properly before release back into environment	52%	12%	40%	12%
Minimising sewer flooding	44%	-3%	39%	5%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Yorkshire Water Base Size: 50

# Executive Summary

## Overview of Key Findings



### Barometer

- In line with November's wave, communication focused on what Yorkshire Water is doing to protect the environment, as well as increasing transparency around billing and costs, is likely to drive higher satisfaction scores.
- Yorkshire Water scores well on a number of individual elements of the water and sewerage satisfaction scores. Trust remains slightly low highlighting a clear opportunity for the brand.

### Spotlight

- Almost all customers were aware of some form of drought order in place where they lived, suggesting communication is working well.
- Drought communication has been positive overall. Continue to maintain good communication.

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

**6.58/10 vs 6.57/10 (Total)**

## Why do Yorkshire Water customers feel this way?

Yorkshire Water generally delivers reliable supply, drinkable water, and strong customer service when contacted. Price rises, recurring low pressure, slow leak fixes, hosepipe bans, river pollution, and a lack of proactive communication are holding satisfaction back.



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

Total Base Size: 822  
Yorkshire Water Base Size: 50



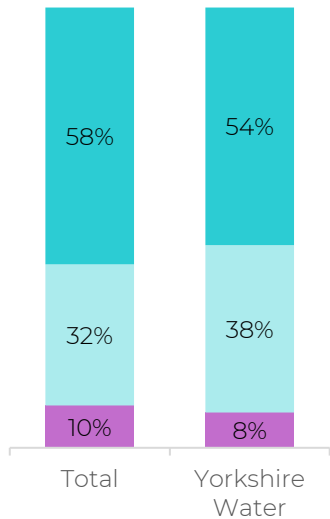
# Yorkshire Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

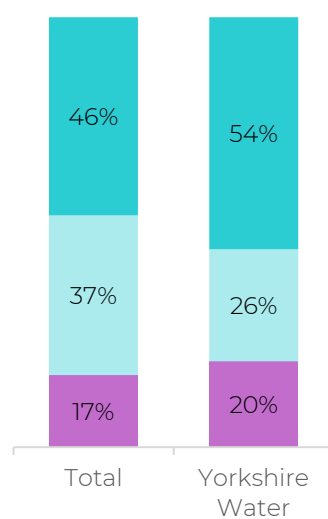
54% are satisfied with Yorkshire Water overall  
8% are not satisfied

Overall Satisfaction - Water



54% are satisfied with value for money  
20% are not satisfied

Overall Value for Money Satisfaction



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

Despite issues with drought and water preservation measures being in place, satisfaction with Yorkshire Water is largely in line with the industry generally. Value for money is also positive, although there are a higher-than-average number of dissatisfied customers.

## Why have you given this overall satisfaction score on water?

*"Whenever I contacted customer service regarding any issue or query, they are very helpful, friendly and solve the problem accordingly."*

Male, 44,  
Lives with partner & children,  
10/10 satisfaction score

*"I have no issues regarding my water supply or its quality. I do have issues about them generally as regards leaks, how they spend money and how they reward shareholders"*

Male, 73, Lives with partner,  
5/10 satisfaction score

*"We get good quality water and the sewage goes down the pipes so that's all good. We pay too much for the service. Communications are terrible. They pollute the rivers and the sea and we have water leaks. We also run out of water in the summer.."*

Male, 64, Lives with partner, 4/10 satisfaction score

In line with November's wave, communication focused on what Yorkshire Water is doing to protect the environment, as well as increasing transparency around billing and costs, is likely to drive higher satisfaction scores.

Total Base Size: 822  
Yorkshire Water Base Size: 50



# Yorkshire Water: Barometer Findings

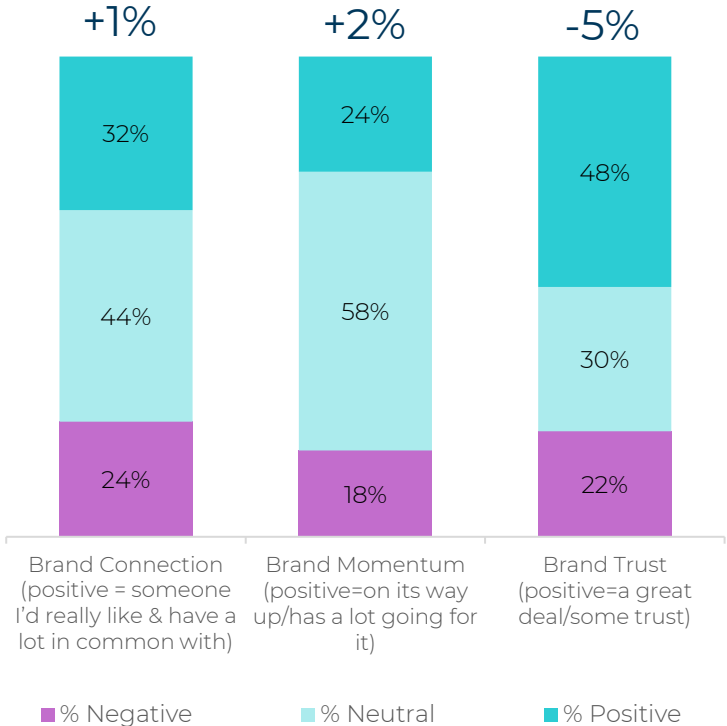
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Yorkshire Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	46%	-1%	-5%
Improves our rivers	44%	+13%	+16%
Creates a greener future	36%	+5%	+3%
Spends customers' money wisely	38%	+18%	+9%
Contributes to our communities	52%	+16%	+13%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	54%	+10%	-4%
Colour & Appearance	90%	+6%	+7%
Taste & Smell	80%	-2%	+3%
Safety of Drinking Water	88%	+1%	+9%
Reliability of Supply	84%	0%	-3%
Water Pressure	72%	-6%	-5%
<b>Sewerage</b>			
Overall Satisfaction	65%	+14%	+10%
Reducing smells from sewage treatment works	52%	+12%	+10%
Maintenance of sewerage pipes and treatment works	54%	+16%	+10%
Cleaning wastewater properly before release back into environment	52%	+12%	+12%
Minimising sewer flooding	44%	-3%	+5%

Yorkshire Water scores well on a number of individual elements of the water and sewerage satisfaction scores. Trust remains slightly low highlighting a clear opportunity for the brand.

Total Base Size: 822  
Yorkshire Water Base Size: 50





# Yorkshire Water: Spotlight Findings



The voice for water consumers  
Llais defnyddwyr dŵr

73% of customers stated that the amount of water they used reduced in 2025 and just 6% stated that the drought had no impact on them.

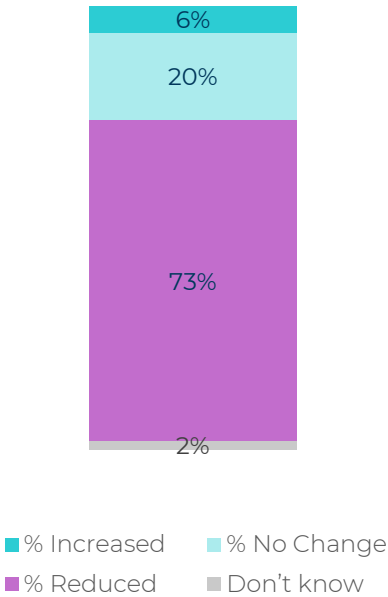
*“The only way I have been affected was by hosepipe ban. I don’t water the grass and watered plants using a watering can. I didn’t wash my car but that was not unusual! Drinking water and water for personal care was not affected.”*

*Male, 73, Lives with partner*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	47%
An official drought declaration	25%
A temporary use ban (e.g., hosepipe ban)	78%
A request from my water company to voluntarily reduce water use	39%
A non-essential use ban affecting businesses	2%
A drought recovery update (e.g., when restrictions eased)	14%
I am not aware of anything being issued in my area	4%

A temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. Limitations on outdoor water use (such as washing your car, using drinking water on the garden) – 65%
- 2. Affected garden - 59%
- 3. Needed to reduce water use at home - 39%
- 4. Felt worried about future water shortages – 39%

Almost all customers were aware of some form of drought order in place where they lived, suggesting communication is working well.



# Yorkshire Water: Spotlight Findings

Drought

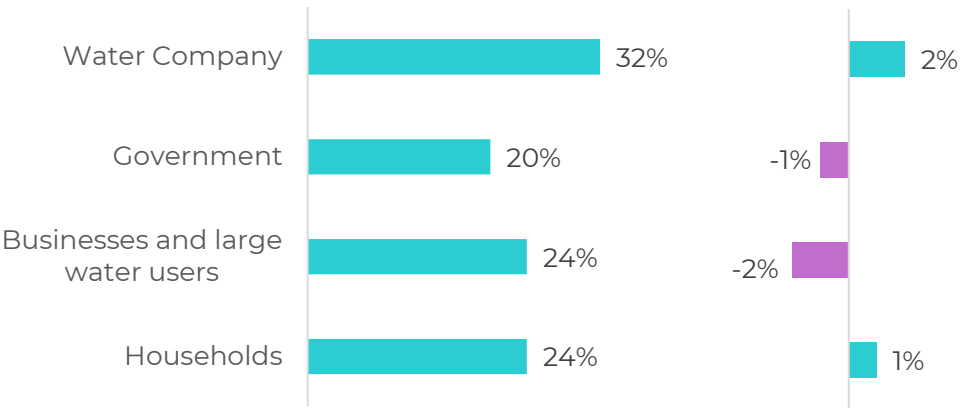


The voice for water consumers  
Llais defnyddwyr dŵr

For Yorkshire Water customers, water companies are seen as holding the greatest responsibility for reducing water usage, driven by expectations around fixing leaks, managing infrastructure and reducing system-level waste. Businesses and households are viewed as sharing a similar level of responsibility, reflecting both high overall usage and the cumulative impact of everyday behaviour.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

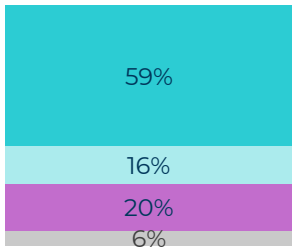
Difference vs Total



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

Drought Communication

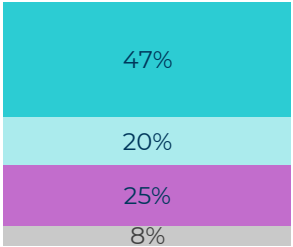
+24%



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that company have effective plans

+4%



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

What support could Yorkshire Water provide?

- 1. Clear updates on the current water resource situation in my area: 37%
- 2. Early warning messages when dry weather conditions begin: 35%
- 3. Free or discounted water-saving devices (e.g., water butts, shower timers) 35%

Drought communication has been positive overall. Continue to maintain good communication.



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Dŵr Cymru**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

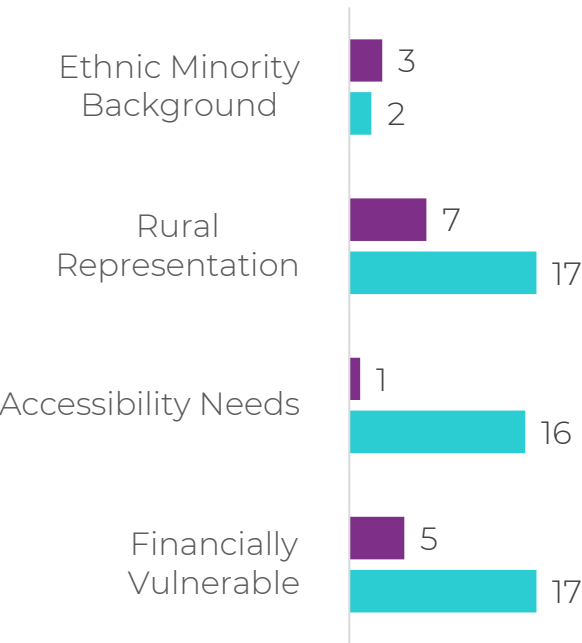


The voice for water consumers  
Llais defnyddwyr dŵr

## Dŵr Cymru Community members: 42

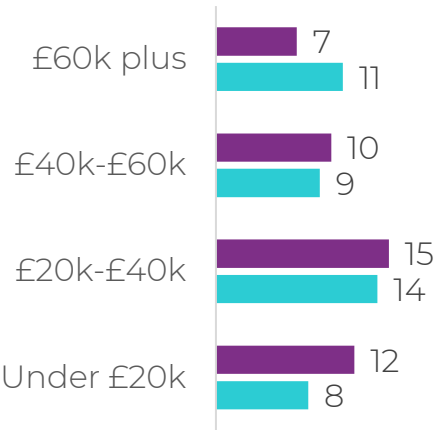
There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language and no one has requested the survey in Welsh.

### Inclusivity

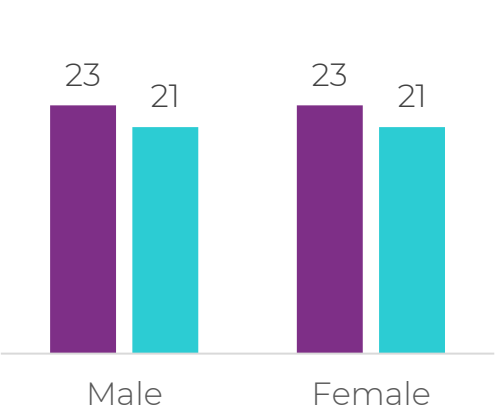


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

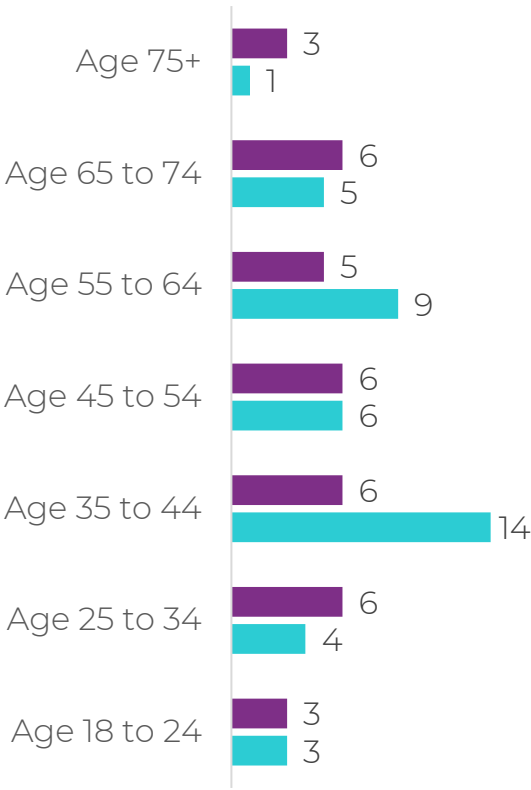
### Household income



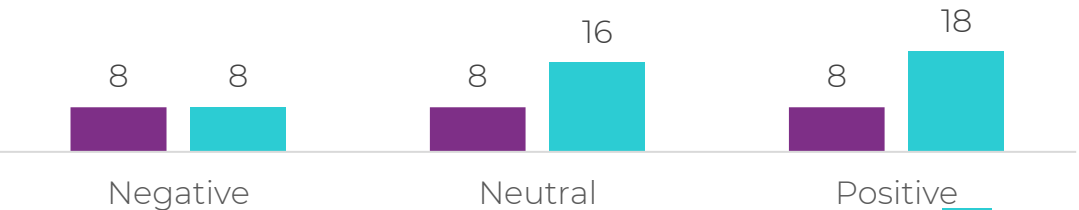
### Gender



### Age



### Attitude to Water company



Current Sample Minimum Sample

**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 75+ sample by at least 2 for next month. N.B. Our lowest household income target is lower than the Minimum Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met.

# Dashboard Summary

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



Topic	Dec 2025 Dŵr Cymru Community Agreement %	+/- difference % Dŵr Cymru Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Dŵr Cymru vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	31%	-1%	33%	-2%
Recent Experience (Positive recent experience)	31%	-3%	46%	-15%
General outlook (Positive outlook)	43%	-3%	49%	-6%
Communication (Fair/good communication)	24%	-4%	38%	-14%
Brand Connection (someone I'd really like & have a lot in common with)	26%	0%	31%	-5%
Brand Momentum (salience) (on its way up/has a lot going for it)	14%	-6%	22%	-8%
Trust (a great deal/some trust)	52%	11%	53%	-1%
Past 4 Week Interaction	33%	-8%	40%	-7%
Past 4 Week Disruption	2%	-9%	6%	-4%
Past 4 Week Water Quality Issues	7%	-2%	6%	1%
Past 4 Week Sewerage issues	0%	0%	3%	-3%
Overall Value for Money	43%	8%	46%	-3%
Overall Satisfaction – Water (satisfied, scoring 7-10)	52%	6%	58%	-6%
Colour & Appearance	83%	0%	83%	0%
Taste & Smell	76%	-2%	77%	-1%
Safety of Drinking Water	71%	-3%	79%	-8%
Reliability of Supply	86%	3%	87%	-1%
Water Pressure	76%	0%	77%	-1%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	52%	4%	55%	-3%
Reducing smells from sewage treatment works	43%	6%	42%	1%
Maintenance of sewerage pipes and treatment works	41%	2%	44%	-3%
Cleaning wastewater properly before release back into environment	31%	4%	40%	-9%
Minimising sewer flooding	38%	15%	39%	-1%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Dŵr Cymru Base Size: 42

# Executive Summary

## Overview of Key Findings



### Barometer

- Opportunity for better justification of price rises. Demonstrate where investment is going and why it is necessary.
- Dŵr Cymru maintain average or below average scores on all water and sewerage satisfaction metrics. Whilst trust is now in line with the industry, connection & momentum can be improved.

### Spotlight

- Opportunity to reassure customers on the work that Dŵr Cymru are doing to ensure future water security.
- Customers are open to free or discounted water-saving devices, early warning messages and clear updates on the current water resource situation in their area.

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

**6.57/10 vs 6.57/10 (Total)**

### Why do Dŵr Cymru customers feel this way?

Dŵr Cymru Welsh Water delivers reliable supply and generally good water quality, with few personal issues reported and some positive experiences around responsiveness. However, some customers are frustrated by sharp price rises, limited visibility of leak prevention and sewage upgrades, and a sense the company is reactive rather than preventative.



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

Total Base Size: 822  
Dŵr Cymru Base Size: 42





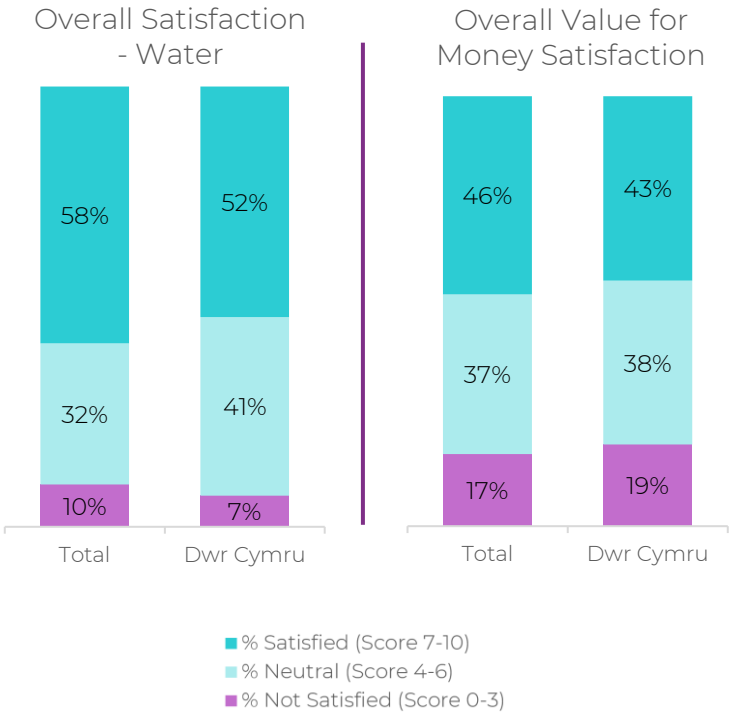
# Dŵr Cymru: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

52% are satisfied with Dŵr Cymru overall  
7% are not satisfied

43% are satisfied with value for money  
19% are not satisfied



Overall satisfaction and value for money satisfaction remain below average. Price increases and a reactive approach to maintenance seem to be driving negative sentiment; however, only 7% of customers are dissatisfied overall.

## Why have you given this overall satisfaction score on water?

*"There is nothing wrong with the company but regular price rises with no added benefits is frustrating"*

Male, 42,  
Lives with partner & children ,  
5/10 satisfaction score

*"I'm not dissatisfied with the service but I'm disappointed in how much they have increased their bills"*

Female, Lives with children, 4/10  
satisfaction score

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

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

Opportunity for better justification of price rises. Demonstrate where investment is going and why it is necessary.

Total Base Size: 822  
Dŵr Cymru Base Size: 42



# Dŵr Cymru: Barometer Findings

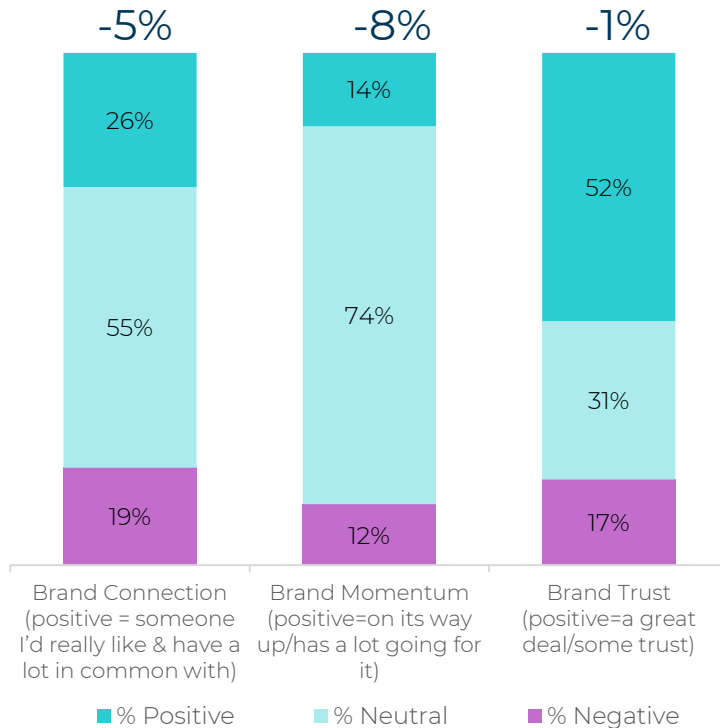
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Dwr Cymru...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	38%	+3%	-13%
Improves our rivers	10%	-3%	-18%
Creates a greener future	14%	-8%	-19%
Spends customers' money wisely	10%	-10%	-19%
Contributes to our communities	21%	+1%	-18%
% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	52%	+6%	-6%
Colour & Appearance	83%	0%	0%
Taste & Smell	76%	-2%	-1%
Safety of Drinking Water	71%	-3%	-8%
Reliability of Supply	86%	+3%	-1%
Water Pressure	76%	0%	-1%
<b>Sewerage</b>			
Overall Satisfaction	52%	+4%	-3%
Reducing smells from sewage treatment works	43%	+6%	+1%
Maintenance of sewerage pipes and treatment works	41%	+2%	-3%
Cleaning wastewater properly before release back into environment	31%	+4%	-9%
Minimising sewer flooding	38%	+15%	-1%

Dŵr Cymru maintain average or below average scores on all water and sewerage satisfaction metrics. Whilst trust is now in line with the industry, connection & momentum can be improved.

Total Base Size: 822  
Dŵr Cymru Base Size: 42



# Dŵr Cymru: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

49% of customers stated that there was no change in the amount of water they used in 2025 and 71% were unaware of any orders in place regarding drought. 60% felt no impact from drought, but 1 in 4 stated they felt worried about future water shortages.

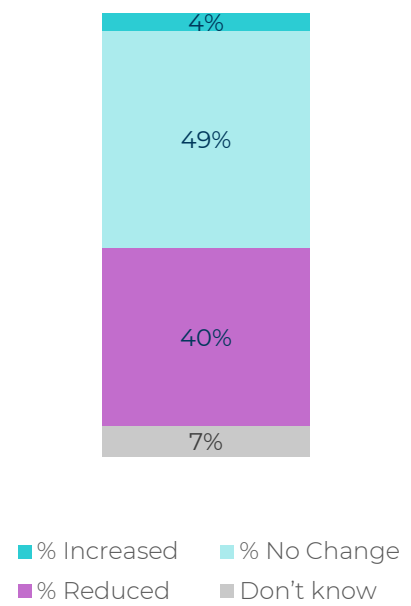
*"I couldn't water the garden and my trees and flowers needed water. I couldn't wash my car. I spent less time in the shower."*

*Female, 65, Lives with children*

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	22%
An official drought declaration	4%
A temporary use ban (e.g., hosepipe ban)	9%
A request from my water company to voluntarily reduce water use	7%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	71%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact – 60%
- 2. Felt worried about future water shortages – 24%
- 3. Felt worried about environmental impacts (e.g., low river or reservoir levels, effects on wildlife) – 20%
- 4. Affected garden - 11%

Opportunity to reassure customers on the work that Dŵr Cymru are doing to ensure future water security.



# Dŵr Cymru: Spotlight Findings

## Drought

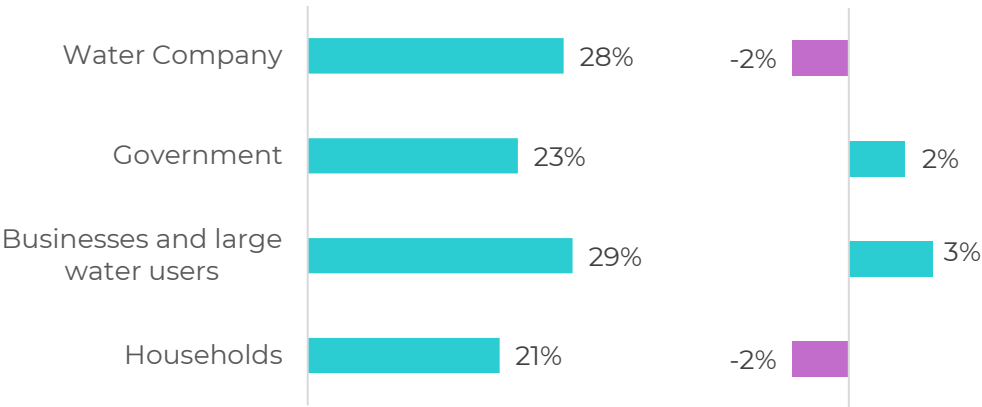


The voice for water consumers  
Llais defnyddwyr dŵr

For Dŵr Cymru customers, businesses and large water users are seen as carrying the greatest responsibility for reducing water usage, reflecting their higher consumption and capacity to deliver meaningful reductions. Water companies are close behind, expected to lead on leakage reduction, infrastructure and communication, while government and households are viewed as having a more supporting role, with households seen as having the least responsibility.

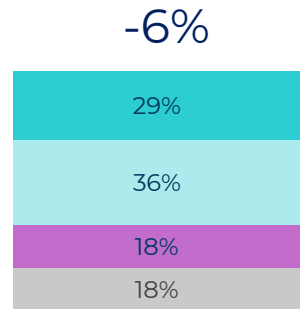
How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

Difference vs Total



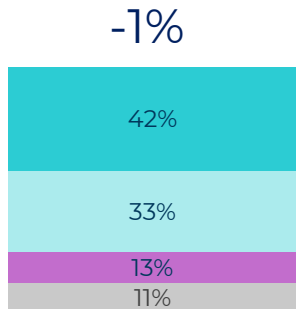
+/- Difference (positive) vs. Current Industry Average

Drought Communication



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that company have effective plans



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

### What support could Dŵr Cymru provide?

- 1. Free or discounted water-saving devices (e.g., water butts, shower timers) 40%
- 2. Early warning messages when dry weather conditions begin: 33%
- 3. Clear updates on the current water resource situation in my area: 31%

Customers are open to free or discounted water-saving devices, early warning messages and clear updates on the current water resource situation in their area.



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Hafren Dyfrdwy**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

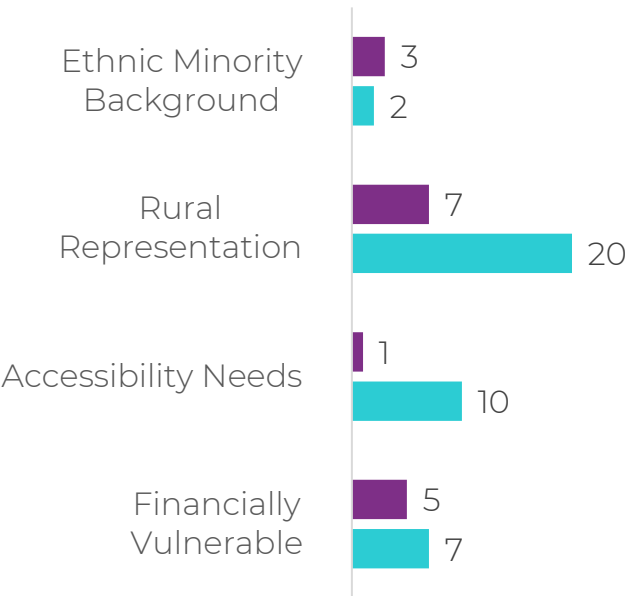
# Hafren Dyfrdwy

Community population



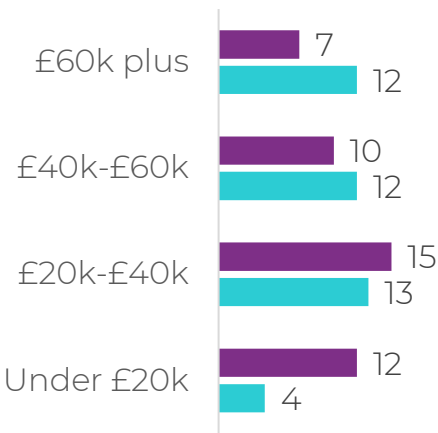
Hafren Dyfrdwy Community members: 41  
There are 9 Welsh speakers within this community with 2 members speaking Welsh as their first language and 2 have requested & been sent the survey in Welsh.

### Inclusivity

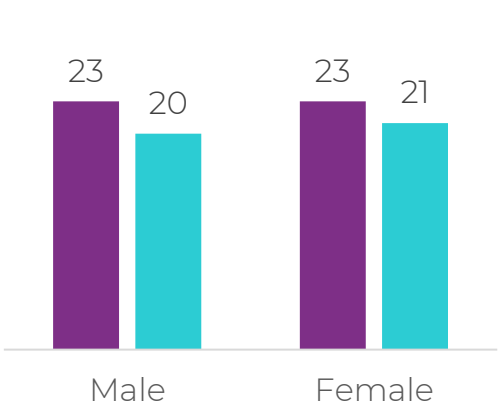


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

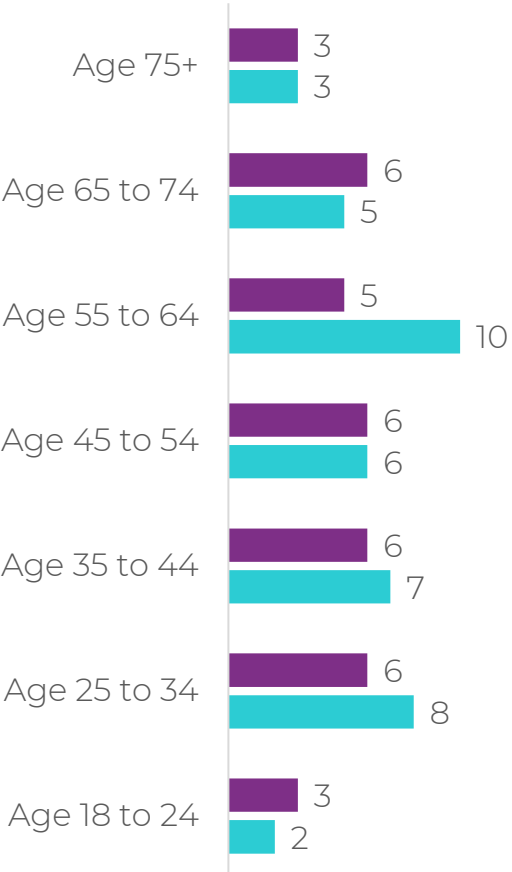
### Household income



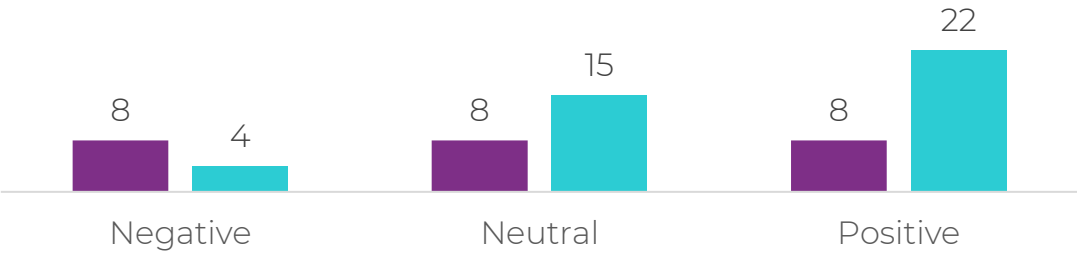
### Gender



### 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 Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our Male, 18-24 sample by at least 1 for next month.



# Dashboard Summary

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



severn dee



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 Hafren Dyfrdwy Community Agreement %	+/- difference % Hafren Dyfrdwy Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Hafren Dyfrdwy vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	27%	3%	33%	-6%
Recent Experience (Positive recent experience)	51%	2%	46%	5%
General outlook (Positive outlook)	54%	3%	49%	5%
Communication (Fair/good communication)	24%	-9%	38%	-14%
Brand Connection (someone I'd really like & have a lot in common with)	29%	5%	31%	-2%
Brand Momentum (salience) (on its way up/has a lot going for it)	32%	5%	22%	10%
Trust (a great deal/some trust)	59%	-9%	53%	6%
Past 4 Week Interaction	27%	0%	40%	-13%
Past 4 Week Disruption	2%	0%	6%	-4%
Past 4 Week Water Quality Issues	2%	2%	6%	-4%
Past 4 Week Sewerage issues	0%	-2%	3%	-3%
Overall Value for Money	49%	-2%	46%	3%
Overall Satisfaction – Water (satisfied, scoring 7-10)	71%	13%	58%	13%
Colour & Appearance	93%	0%	83%	10%
Taste & Smell	83%	-8%	77%	6%
Safety of Drinking Water	85%	-2%	79%	6%
Reliability of Supply	98%	7%	87%	11%
Water Pressure	88%	6%	77%	11%
Overall Satisfaction – Sewerage (satisfied, scoring 7-10)	66%	10%	55%	11%
Reducing smells from sewage treatment works	54%	20%	42%	12%
Maintenance of sewerage pipes and treatment works	49%	17%	44%	5%
Cleaning wastewater properly before release back into environment	51%	7%	40%	11%
Minimising sewer flooding	56%	9%	39%	17%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Hafren Dyfrdwy Base Size: 41

# Executive Summary

## Overview of Key Findings



### Barometer

- There is an opportunity to improve transparency and communication around how money is invested to improve value for money perceptions.
- Hafren Dyfrdwy is once again performing well on almost all water and sewerage satisfaction metrics, with the exception of 'spends customers money wisely'. Transparency needed here to demonstrate investment being made.

### Spotlight

- Opportunity for Hafren Dyfrdwy communicate about the work they are doing to manage the impact of drought on the local environment.
- Confidence that Hafren Dyfrdwy have effective drought plans is positive. Customers are open to clear updates on current water resources as well as early warning messages and free or discounted water-saving devices.

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

**7.07/10 vs 6.57/10 (Total)**

### Why do Hafren Dyfrdwy customers feel this way?

Hafren Dyfrdwy provides a reliable, uninterrupted water and wastewater service with generally good water quality and helpful customer service when contacted. However, customers are frustrated by high and rising bills, limited transparency about how money is spent, and concerns about underinvestment in infrastructure, pollution, and future sustainability.



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

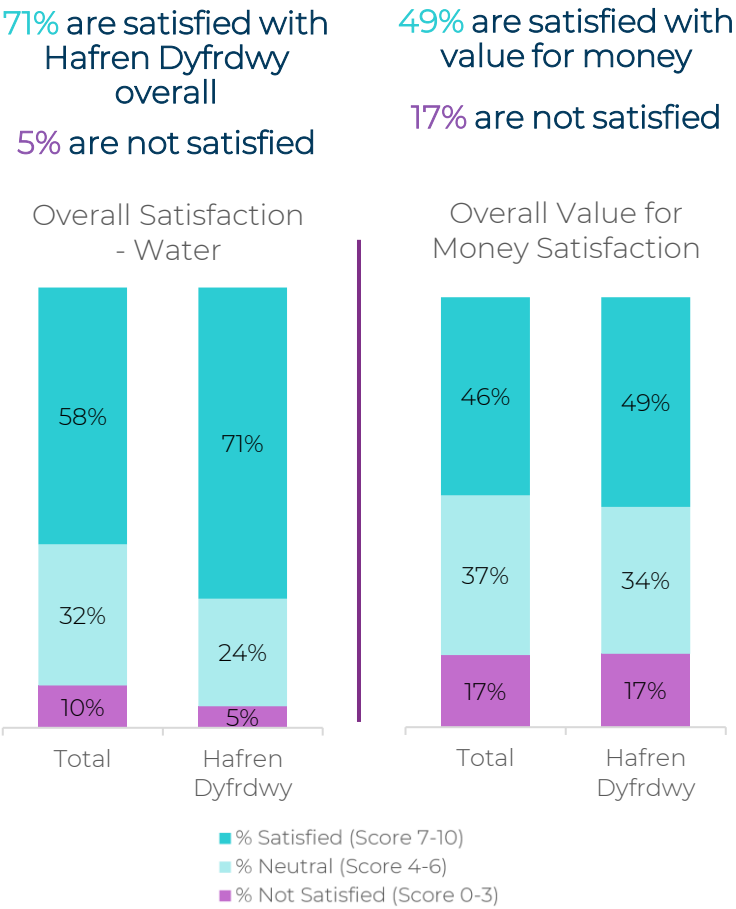
Total Base Size: 822  
Hafren Dyfrdwy Base size: 41



# Hafren Dyfrdwy: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr





# Hafren Dyfrdwy: Barometer Findings

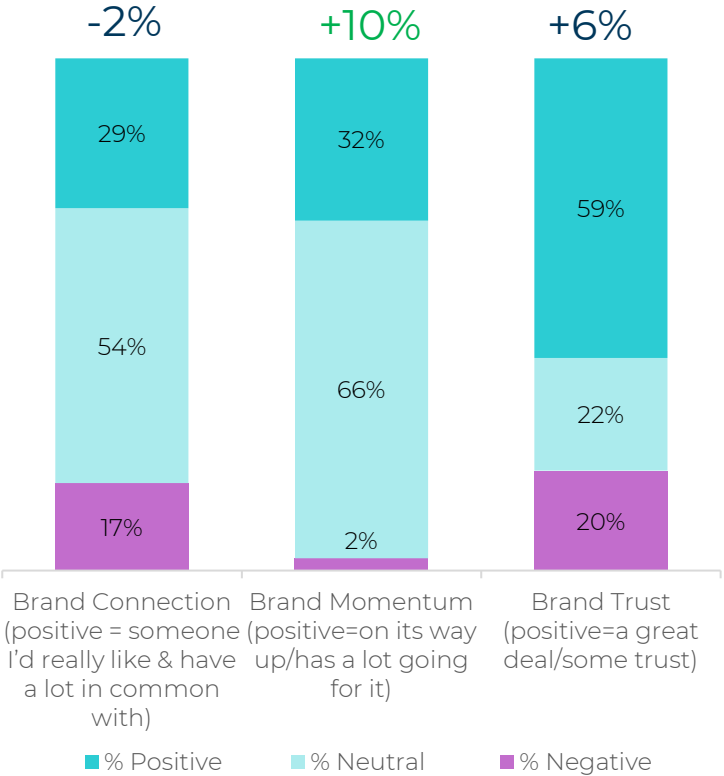
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Hafren Dyfrdwy Water in relation to Connection, Momentum & Trust



% Who agree that Hafren Dyfrdwy...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	63%	+3%	+12%
Improves our rivers	20%	0%	-8%
Creates a greener future	32%	+14%	-1%
Spends customers' money wisely	17%	-5%	-12%
Contributes to our communities	37%	+10%	-2%
% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	71%	+13%	+13%
Colour & Appearance	93%	0%	+10%
Taste & Smell	83%	-8%	+6%
Safety of Drinking Water	85%	-2%	+6%
Reliability of Supply	98%	+7%	+11%
Water Pressure	88%	+6%	+11%
<b>Sewerage</b>			
Overall Satisfaction	66%	+10%	+11%
Reducing smells from sewage treatment works	54%	+21%	+12%
Maintenance of sewerage pipes and treatment works	49%	+18%	+5%
Cleaning wastewater properly before release back into environment	51%	+7%	+11%
Minimising sewer flooding	56%	+9%	+17%

Hafren Dyfrdwy is performing well on almost all water and sewerage satisfaction metrics, with the exception of ‘spends customers money wisely’. Transparency needed here to demonstrate investment being made.



# Hafren Dyfrdwy: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

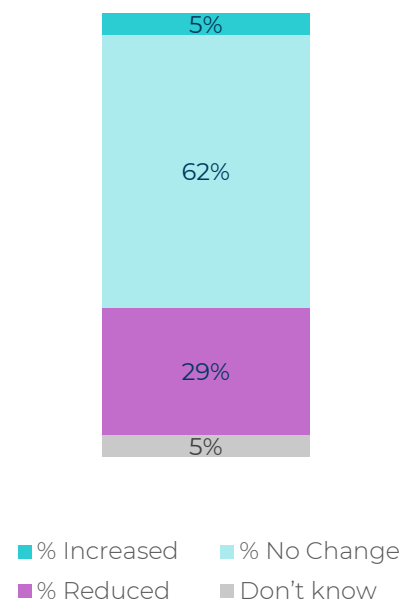
62% of customers stated that there was no change in the amount of water they used in 2025 and 76% were unaware of any orders in place regarding drought. 50% of customers felt no impact of drought in their household but 1 in 5 did feel worried about the environmental impacts of prolonged dry weather.

*“For personalise of water pretty much not at all. The river and canal were low at times very low. This has a knock on affect on wildlife and fish. Also the ground dries out and hardens which makes flooding more likely as the ground is unable to soak up the water.”*  
Female, 73, Lives with partner

Which, if any, of the following were you aware of being issued for your area in 2025?	% Aware
A prolonged dry weather warning or notice	17%
An official drought declaration	2%
A temporary use ban (e.g., hosepipe ban)	2%
A request from my water company to voluntarily reduce water use	7%
A non-essential use ban affecting businesses	2%
A drought recovery update (e.g., when restrictions eased)	-
I am not aware of anything being issued in my area	76%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact – 50%
- 2. Felt worried about environmental impacts (e.g., low river or reservoir levels, effects on wildlife) – 21%
- 3. Affected garden - 21%

Opportunity for Hafren Dyfrdwy communicate about the work they are doing to manage the impact of drought on the local environment.



# Hafren Dyfrdwy: Spotlight Findings

Drought

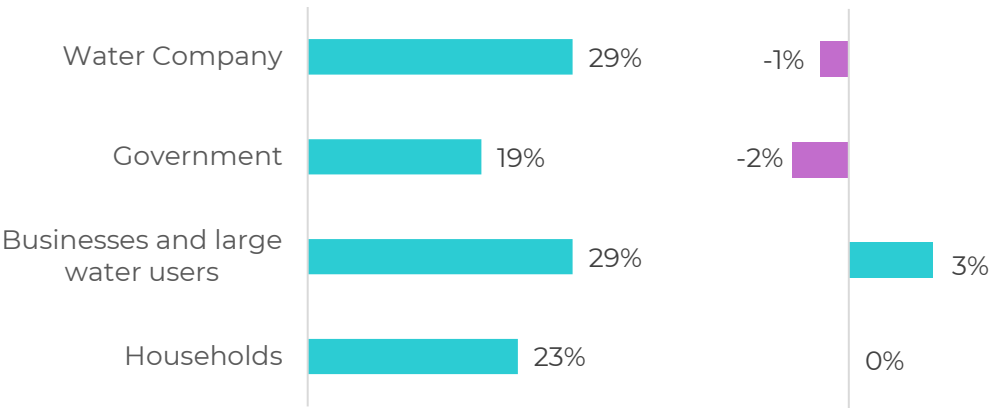


The voice for water consumers  
Llais defnyddwyr dŵr

For Hafren Dyfrdwy customers, water companies and large business users are seen as most responsible for reducing water usage during drought, due to their control over infrastructure, leakage, and scale of consumption. Households are expected to play a role, but customers are clear this should sit alongside better leak management, clearer guidance, and stronger leadership from providers.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

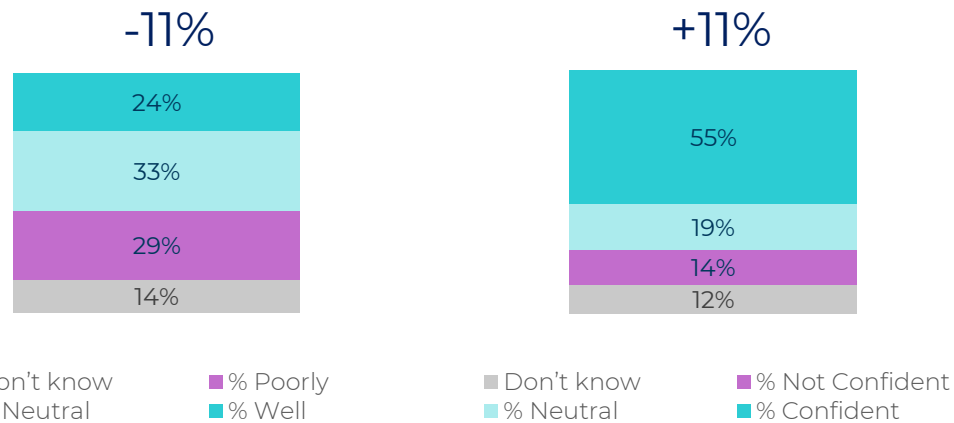
Difference vs Total



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

Drought Communication

Confidence that company have effective plans



What support could Hafren Dyfrdwy provide?

1. Clear updates on the current water resource situation in my area: 40%
2. Early warning messages when dry weather conditions begin: 38%
3. Free or discounted water-saving devices (e.g., water butts, shower timers) 38%

Confidence that Hafren Dyfrdwy have effective drought plans is positive. Customers are open to clear updates on current water resources as well as early warning messages and free or discounted water-saving devices.





The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Affinity Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

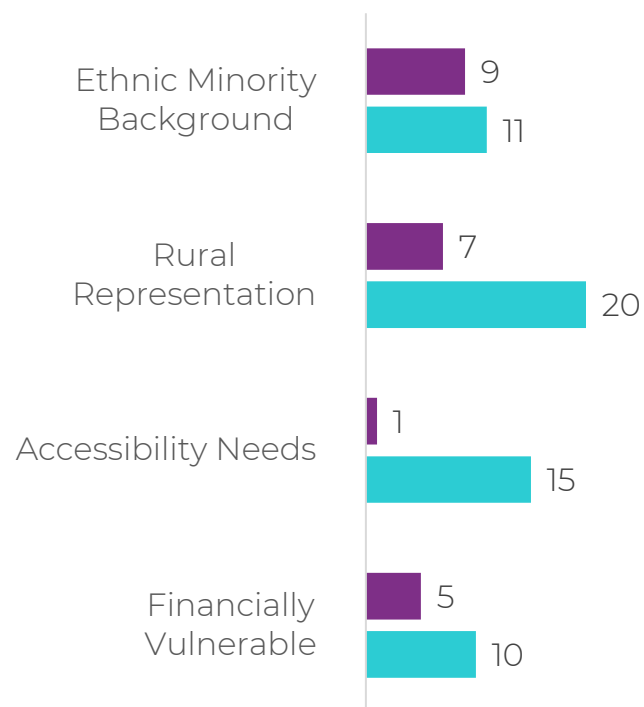
# Affinity Water

Community population



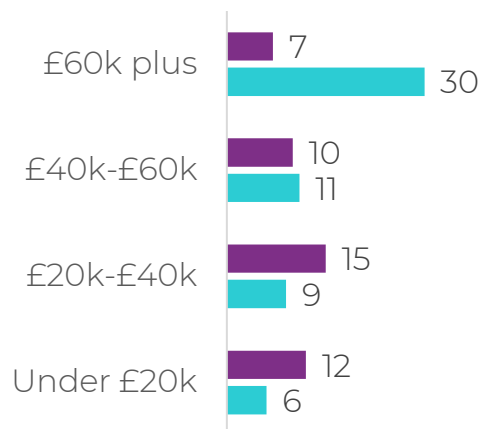
Affinity Water Community members: 56

## Inclusivity

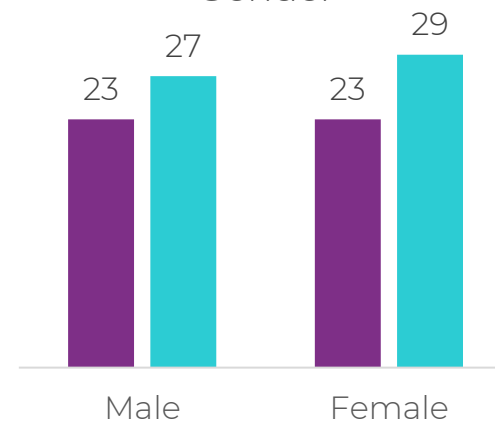


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

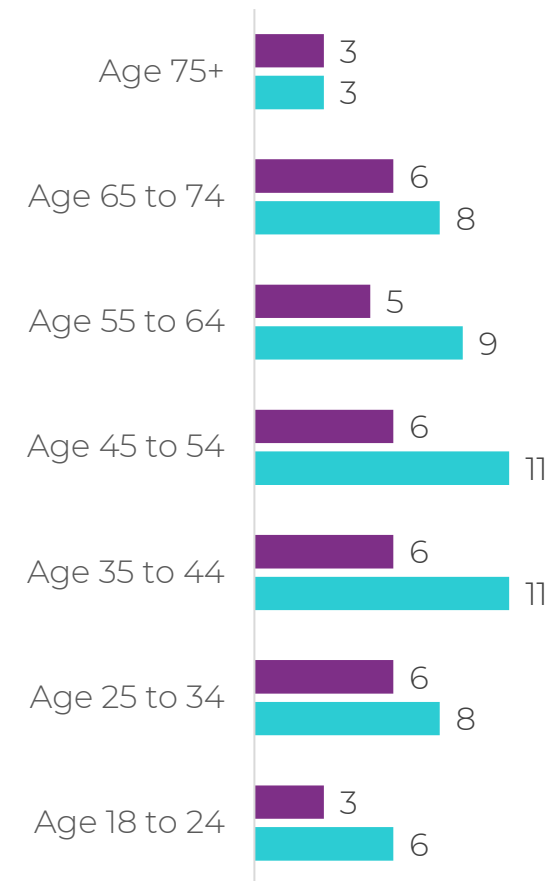
## Household income



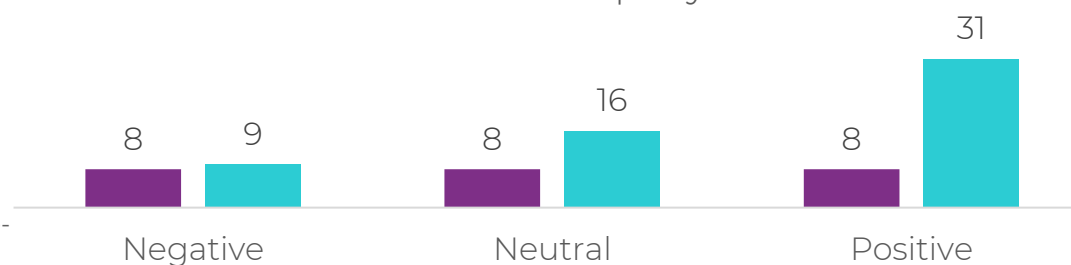
## Gender



## Age



## Attitude to Water company



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

Current Sample Minimum Sample

# Dashboard Summary

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



Topic	Dec 2025 Affinity Community Agreement %	+/- difference % Affinity Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Affinity vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	41%	10%	33%	8%
Recent Experience (Positive recent experience)	55%	6%	46%	9%
General outlook (Positive outlook)	55%	13%	49%	6%
Communication (Fair/good communication)	48%	8%	38%	10%
Brand Connection (someone I'd really like & have a lot in common with)	39%	11%	31%	8%
Brand Momentum (salience) (on its way up/has a lot going for it)	34%	12%	22%	12%
Trust (a great deal/some trust)	57%	10%	53%	4%
Past 4 Week Interaction	34%	1%	40%	-6%
Past 4 Week Disruption	5%	1%	6%	-1%
Past 4 Week Water Quality Issues	2%	-4%	6%	-4%
Past 4 Week Sewerage issues	0%	-2%	3%	-3%
Overall Value for Money	55%	14%	46%	9%
Overall Satisfaction – Water (satisfied, scoring 7-10)	71%	1%	58%	13%
Colour & Appearance	82%	-1%	83%	-1%
Taste & Smell	82%	12%	77%	5%
Safety of Drinking Water	86%	12%	79%	7%
Reliability of Supply	89%	0%	87%	2%
Water Pressure	82%	6%	77%	5%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

# Executive Summary

## Overview of Key Findings

### Barometer

- Overall satisfaction remains high and stable versus Wave 1, supported by reliable day-to-day service. However, value for money concerns – particularly around rising bills and transparency of spend – present a clear opportunity to strengthen confidence and trust.
- Strong brand connection and momentum place Affinity Water above industry norms, with further trust gains linked to reassurance on water quality, particularly colour and appearance.

### Spotlight

- Behaviour change is present but not widespread, with many customers reporting no impact or no change in water usage. Increased drought messaging could support greater awareness and encourage behaviour change during future dry periods.
- Affinity Water is expected to lead on drought management, with confidence in both communication and plans above the industry average. Customers are looking for practical support, including early warnings, local water-resource updates and tracking tools.

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

**6.91/10 vs 6.57/10 (Total)**

**Why do Affinity Water customers feel this way?**

Customers continue to view Affinity Water as reliable, with generally good customer service and a stable supply. However, rising bills, hard water quality, and limited visibility on how money is spent – alongside environmental and metering concerns – mean there is further opportunity to strengthen trust and overall confidence.



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

Total Base Size: 822  
Affinity Water Base Size: 56



# Affinity Water: Barometer Findings

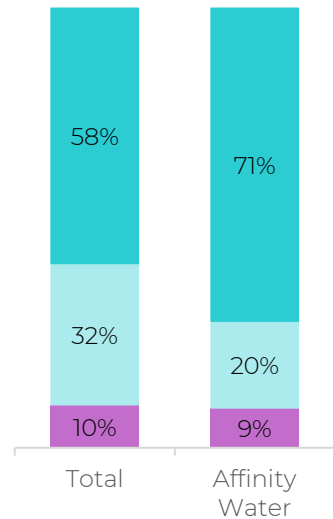


The voice for water consumers  
Llais defnyddwyr dŵr

71% are satisfied with Affinity Water overall

9% are not satisfied

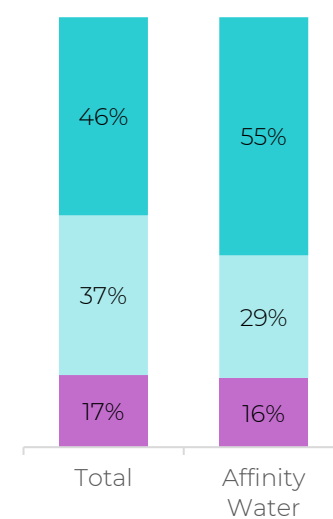
Overall Satisfaction - Water



55% are satisfied with value for money

16% are not satisfied

Overall Value for Money Satisfaction



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

Overall satisfaction with Affinity Water remains above industry average and consistent with scores in wave 1. Those who are 'not satisfied' aligns with industry average scores.

While value for money scores lag behind overall satisfaction, they are still above industry average. Scores also show improvement in overall satisfaction with fewer customers claiming they are 'unsatisfied' compared with wave 1 results.

## Why have you given this overall satisfaction score on water?

*"They charge way too much and have unjustifiably increased charges the last 2 years."*

*Male, 48, Lives with partner/spouse, Affinity Water, 5/10 satisfaction score*

*"Quite expensive but good customer service although they are not doing enough to invest to prevent leaks and issues with water quality."*

*Male, 32, Lives with partner/spouse, Affinity Water, 7/10 satisfaction score*

*"Noticed improvement in water pressure and overall customer service in last 12 months."*

*Male, 21, Lives with other adult/family member, Affinity Water, 8/10 satisfaction score*

Overall satisfaction remains high and stable versus Wave 1, supported by reliable day-to-day service. However, value for money concerns – particularly around rising bills and transparency of spend – present a clear opportunity to strengthen confidence and trust

Total Base Size: 822  
Affinity Water Base Size: 56



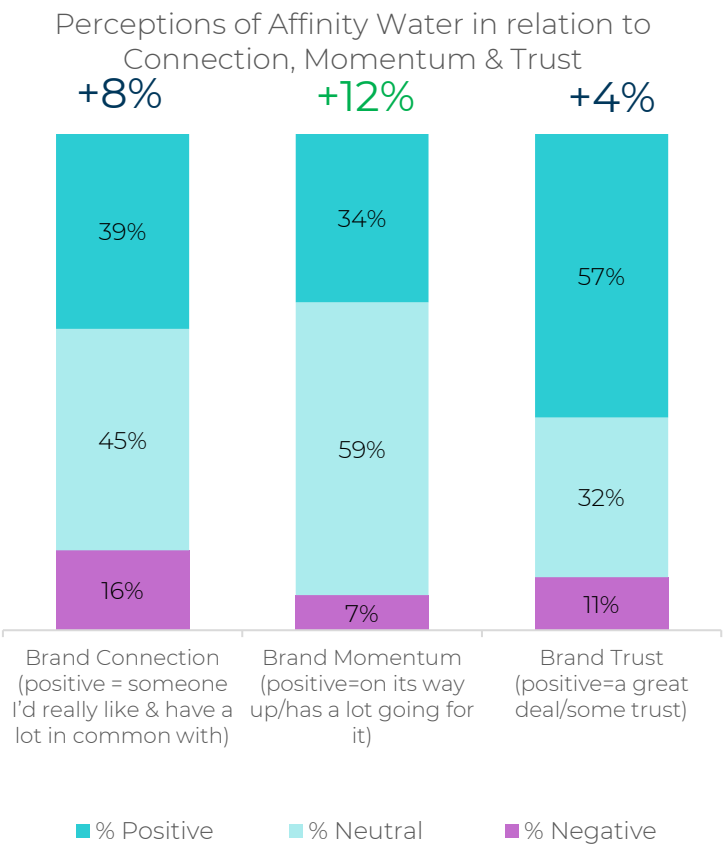
# Affinity Water: Barometer Findings

Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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



% Who agree that Affinity Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	61%	+22%	+10%
Improves our rivers	45%	+21%	+17%
Creates a greener future	43%	+17%	+10%
Spends customers' money wisely	43%	+26%	+14%
Contributes to our communities	50%	+30%	+11%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<strong>Water</strong>			
Overall Satisfaction	71%	1%	+13%
Colour & Appearance	82%	-1%	-1%
Taste & Smell	82%	+12%	+5%
Safety of Drinking Water	86%	+12%	+7%
Reliability of Supply	89%	0%	+2%
Water Pressure	82%	6%	+5%

Strong brand connection and momentum place Affinity Water above industry norms, with further trust gains linked to reassurance on water quality, particularly colour and appearance.

Total Base Size: 822  
Affinity Water Base Size: 56





# Affinity Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

Around a third of Affinity Water customers reported reducing their water use during 2025, while a majority say their behaviour did not change and four in ten report no personal impact. Awareness of drought-related communications is mixed, with over a third recalling a request to voluntarily reduce usage, but nearly half unaware of any communications being issued locally.

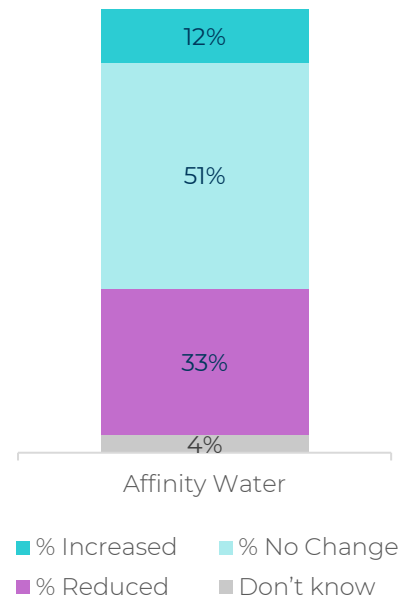
*"It didn't (affect us). We received a letter asking us to minimise use and threatened a hose pipe ban, but nothing else."*

*Female, 45, Lives with partner/spouse & children*

Drought Awareness	% Aware
A prolonged dry weather warning or notice	21%
An official drought declaration	7%
A temporary use ban (e.g., hosepipe ban)	14%
A request from my water company to voluntarily reduce water use	35%
A non-essential use ban affecting businesses	4%
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	46%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact - 40%
- 2. Felt worried about future water shortages - 30%
- 3. Affected garden - 25%
- 4. Felt worried about environmental impacts (e.g., low river or reservoir levels, effects on wildlife)- 25%

Behaviour change is present but not widespread, with many customers reporting no impact or no change in usage. Increased drought messaging could support greater awareness and encourage behaviour change during future dry periods.



# Affinity Water: Spotlight Findings

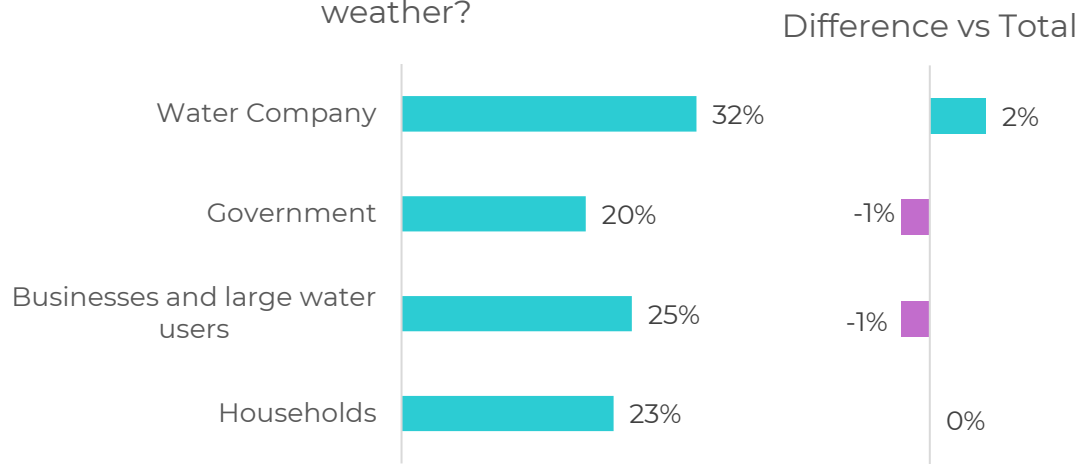
## Drought



The voice for water consumers  
Llais defnyddwyr dŵr

Affinity Water customers place most responsibility on the water company to reduce water usage during drought than on households, government or businesses. Responsibility attributed to government or businesses is slightly lower than the total communities' average, while views on households are broadly in line with overall norms, reinforcing expectations that Affinity Water should lead drought action.

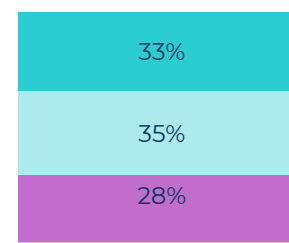
How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?



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

Affinity Water Drought Communication

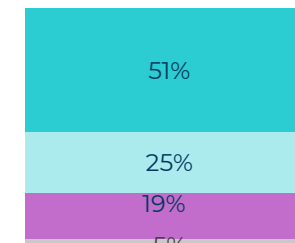
**+23%**



■ Don't know  
■ % Poorly  
■ % Neutral  
■ % Well

Confidence that Affinity Water have effective plans

**+17%**



■ Don't know  
■ % Not Confident  
■ % Neutral  
■ % Confident

What support could Affinity Water provide?

1. Early warning messages when dry weather conditions begin: 37%
2. Clear updates on the current water resource situation in my area: 33%
3. Tools to help track my water use (e.g., online dashboard, app updates) 33%

Affinity Water is expected to lead on drought management, with confidence in both communication and plans above the industry average. Customers are looking for practical support, including early warnings, local water-resource updates and tracking tools

Total Base Size: 822  
Affinity Water Base Size: 56



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**Portsmouth Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

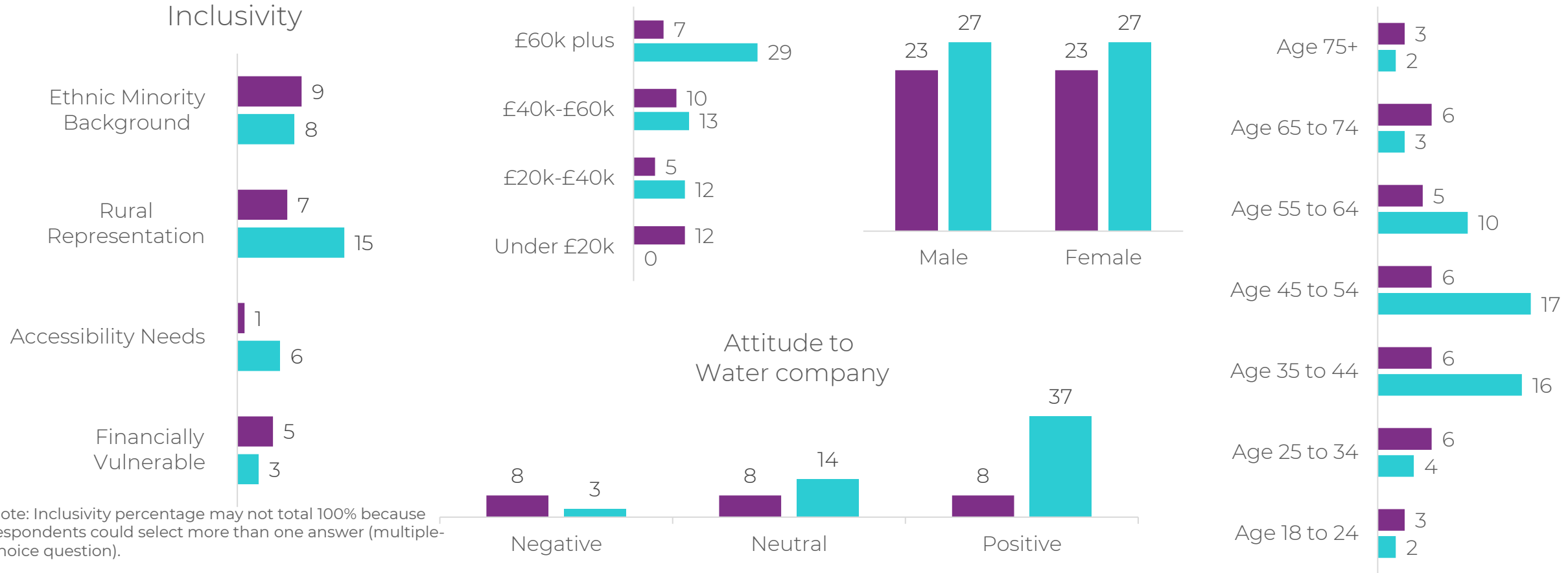
# Portsmouth Water

Community population



The voice for water consumers  
Llais defnyddwyr dŵr

Portsmouth Water  
Community members: 54



**Sample note:** We have met 95% of our minimum sample quotas. N.B. Our lowest household income target is lower than the Minimum Sample, however we were able to reach some financially vulnerable customers by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our ethnic minority background and 18-24 & 75+ sample by at least 1 for next month.

Current Sample Minimum Sample

# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 Portsmouth Water Community Agreement %	+/- difference % Portsmouth Water Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % Portsmouth Water vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	56%	8%	33%	23%
Recent Experience (Positive recent experience)	63%	4%	46%	17%
General outlook (Positive outlook)	69%	2%	49%	20%
Communication (Fair/good communication)	67%	15%	38%	29%
Brand Connection (someone I'd really like & have a lot in common with)	67%	12%	31%	36%
Brand Momentum (salience) (on its way up/has a lot going for it)	43%	-2%	22%	21%
Trust (a great deal/some trust)	78%	8%	53%	25%
Past 4 Week Interaction	44%	1%	40%	4%
Past 4 Week Disruption	11%	9%	6%	5%
Past 4 Week Water Quality Issues	6%	0%	6%	0%
Past 4 Week Sewerage issues	9%	3%	3%	6%
Overall Value for Money	83%	5%	46%	37%
Overall Satisfaction – Water (satisfied, scoring 7-10)	82%	4%	58%	24%
Colour & Appearance	93%	-1%	83%	10%
Taste & Smell	85%	-1%	77%	8%
Safety of Drinking Water	85%	-5%	79%	6%
Reliability of Supply	96%	-2%	87%	9%
Water Pressure	93%	-1%	77%	16%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and Portsmouth Water Base Size: 54

# Executive Summary

## Overview of Key Findings

### Barometer

- Overall satisfaction and value for money scores **continue to be industry leading**. Maintaining this strong performance should remain Portsmouth Water's focus.
- Strong water service satisfaction continues to translate into high levels of brand connection, momentum and trust. This ultimately reinforces customer confidence and positively enhances Portsmouth Water's reputation.

### Spotlight

- Voluntary water-saving behaviour is evident even in the absence of formal restrictions. Strengthening awareness through clearer drought messaging and regular prompts could help Portsmouth Water sustain and reinforce this behaviour during future dry periods.
- Portsmouth Water is seen as most responsible for reducing water use and performs above the industry average on drought communication and customer confidence. More practical support, particularly tools to track water use and clearer local updates on water resource levels would be welcomed by customers.



The voice for water consumers  
Llais defnyddwyr dŵr

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

**7.85/10 vs 6.57/10 (Total)**

**Why do Portsmouth Water customers feel this way?**

Customers describe Portsmouth Water as consistently reliable and offering high quality service levels, with satisfaction driven by dependable supply, excellent water quality and responsive customer service.



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

Total Base Size: 822  
Portsmouth Water Base Size: 54





# Portsmouth Water: Barometer Findings

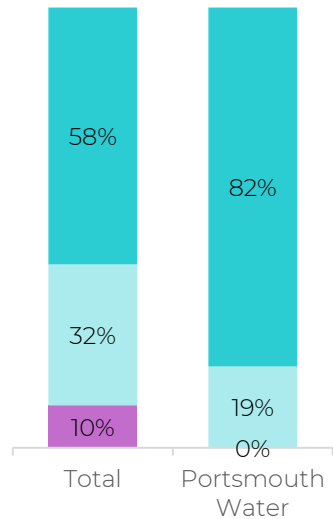


The voice for water consumers  
Llais defnyddwyr dŵr

82% are satisfied with Portsmouth Water overall

0% are not satisfied

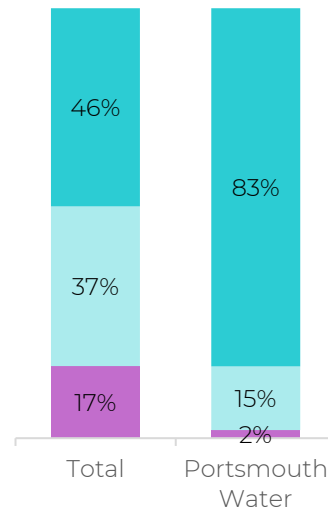
Overall Satisfaction - Water



83% are satisfied with value for money

2% are not satisfied

Overall Value for Money Satisfaction



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

Overall satisfaction continues to be extremely strong with the highest overall scores recorded across industry measures (it is notable that no community member claimed to be 'unsatisfied').

Value for money perceptions also exceed the industry average by 37% with only 2% claiming they were 'not satisfied' on this measure.

## Why have you given this overall satisfaction score on water?

*"I'm grateful for continuous clean water and local resources to maintain this"*

*Female, 46, lives with child/children, Portsmouth Water, 7/10 satisfaction score*

*"Quick to respond in emergencies - their team is always reliable and efficient, and I feel confident knowing that any urgent issue will be dealt with promptly."*

*Male, 32, lives with partner/spouse, Portsmouth Water, 10/10 satisfaction score*

*"Well known for very high water quality...much of it comes from chalk aquifers, which naturally filter and give it a clean taste"*

*Male, 47, lives with partner/spouse, Portsmouth Water, 9/10 satisfaction score*

Overall satisfaction and value for money scores continue to be industry leading. Maintaining this strong performance should remain the focus.

Total Base Size: 822  
Portsmouth Water Base Size: 54



# Portsmouth Water: Barometer Findings

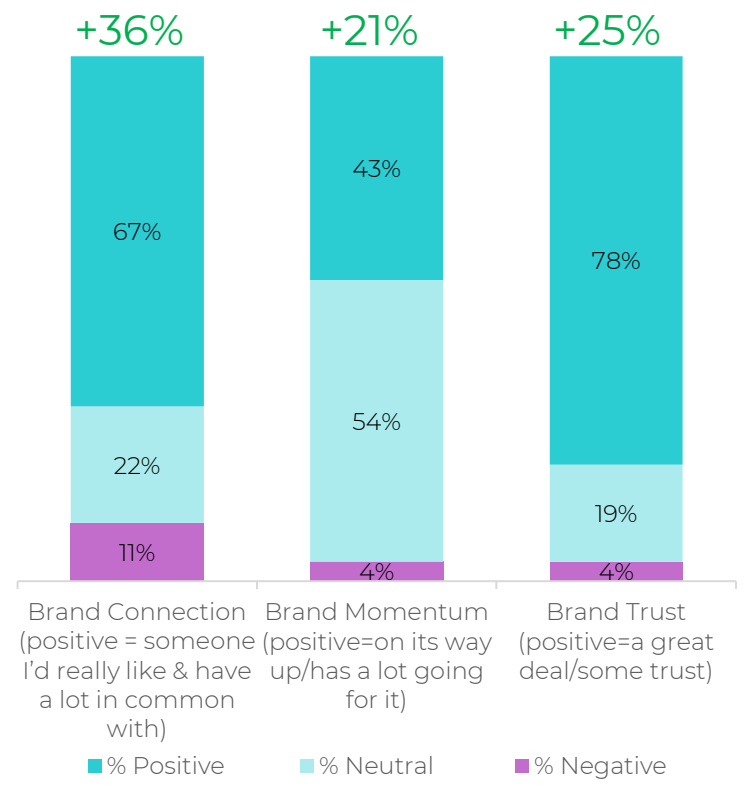
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that Portsmouth Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	83%	+24%	+32%
Improves our rivers	59%	+14%	+31%
Creates a greener future	67%	+18%	+34%
Spends customers' money wisely	67%	+22%	+38%
Contributes to our communities	61%	+8%	-22%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	82%	+4%	+24%
Colour & Appearance	93%	-1%	+10%
Taste & Smell	85%	-1%	+8%
Safety of Drinking Water	85%	-5%	+6%
Reliability of Supply	96%	-2%	+9%
Water Pressure	93%	-1%	+16%

Strong water service satisfaction continues to translate into high levels of brand connection, momentum and trust. This ultimately reinforces customer confidence and positively enhances Portsmouth Water's reputation.

Total Base Size: 822  
Portsmouth Water Base Size: 54



# Portsmouth Water: Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

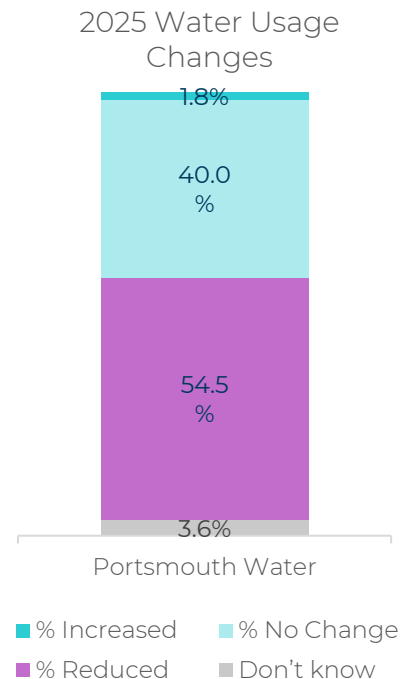
55% of Portsmouth Water customers report reducing their water use during 2025. While over a third were not aware of any drought-related communications, 33% recall a request to voluntarily reduce use, indicating behaviour change despite no hosepipe ban being in place.

*"We didn't have a [hose] pipe ban but I was very aware of trying to use less water. I sometimes see a member of the water company testing the stand pipes, if we have a long dry spell. I do buy some bottled water ready for the summer, just in case."*

*Female, 60, Lives with partner/spouse*

Drought Awareness	% Aware
A prolonged dry weather warning or notice	24%
An official drought declaration	16%
A temporary use ban (e.g., hosepipe ban)	15%
A request from my water company to voluntarily reduce water use	33%
A non-essential use ban affecting businesses	4%
A drought recovery update (e.g., when restrictions eased)	4%
I am not aware of anything being issued in my area	36%

No temporary use ban was in place in 2025



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

1. No impact - 35%
2. Affected garden - 35%
3. Needed to reduce water at home - 27%
4. Limitations on outdoor water use - 25%

Voluntary water-saving behaviour is evident even in the absence of formal restrictions. Strengthening awareness through clearer drought messaging and regular prompts could help Portsmouth Water sustain and reinforce this behaviour during future dry periods.

Total Base Size: 822  
Portsmouth Water Base Size: 54



# Portsmouth Water: Spotlight Findings

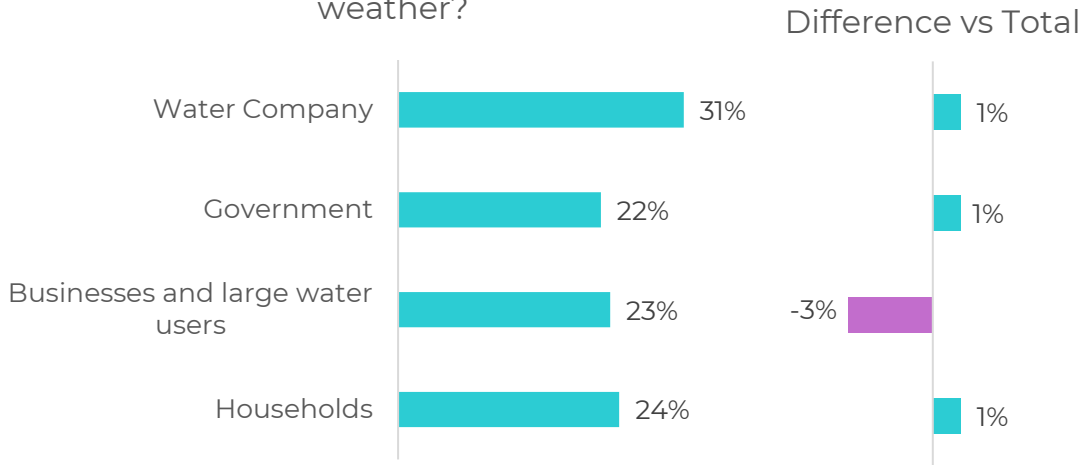
Drought



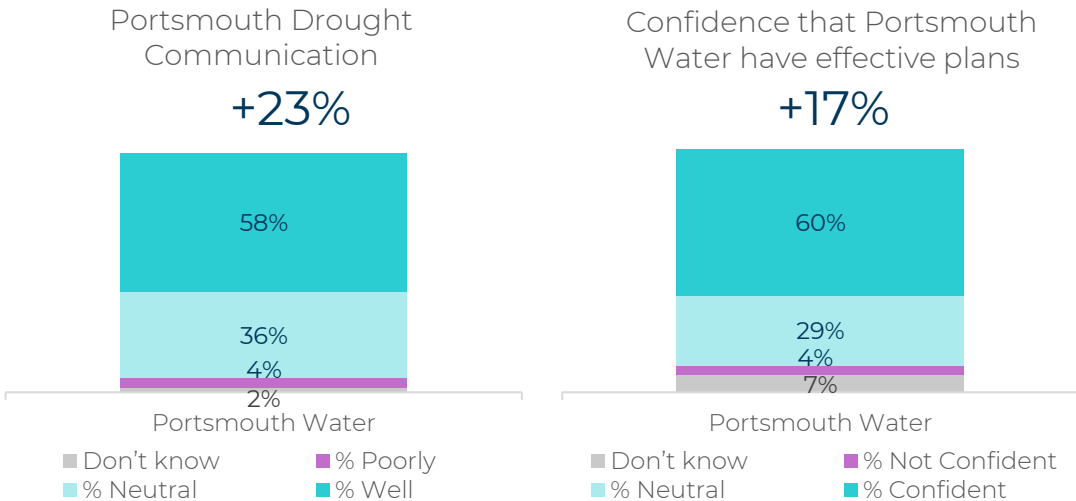
The voice for water consumers  
Llais defnyddwyr dŵr

Portsmouth Water customers place greater responsibility on the water company than on households, government or businesses for reducing water usage during drought. Responsibility attributed to businesses is slightly lower than the total communities' average, while views on households and government are broadly in line with overall norms

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?



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



What support could Portsmouth Water provide?

- 1. Tools to track my water use (e.g. online dashboard, app updates) 40%
- 2. Clear updates on the current water resource situation in my area: 36%
- 3. Advice on how to use water efficiently in the garden/outdoors: 31%



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**South East Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

# South East Water

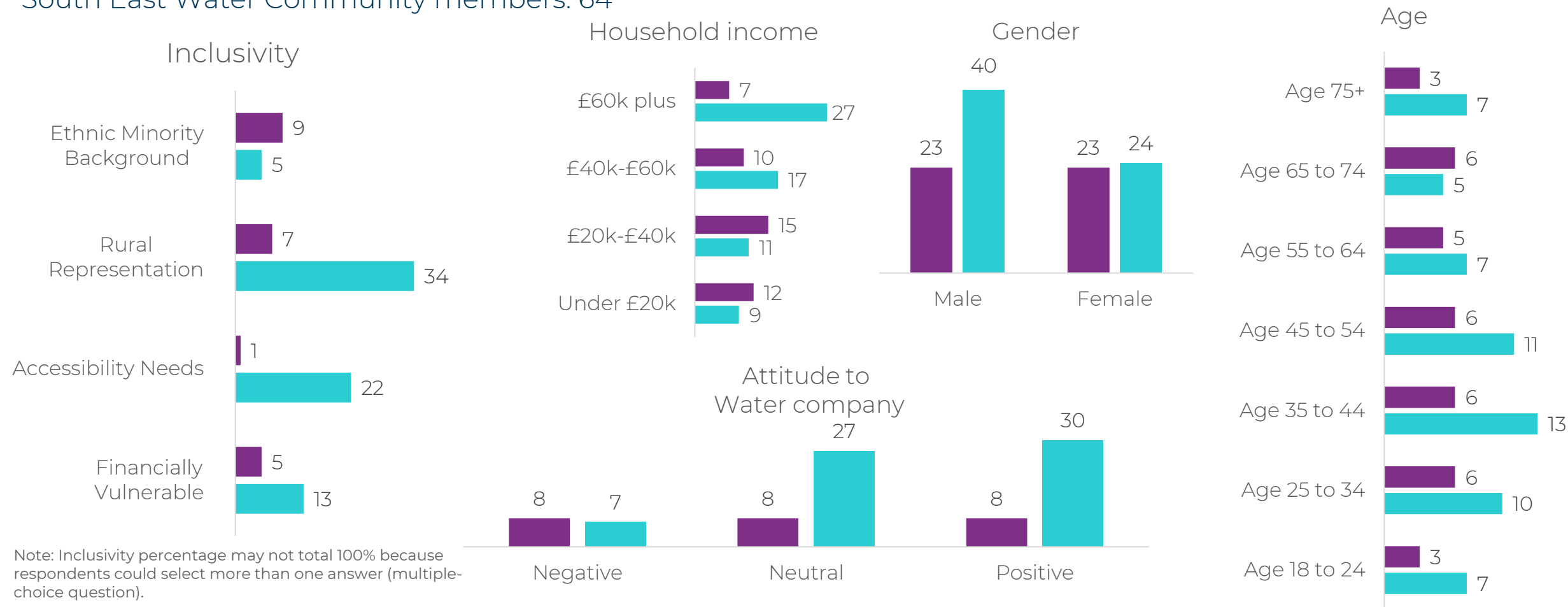
Community population

south east water



The voice for water consumers  
Llais defnyddwyr dŵr

South East Water Community members: 64



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

Current Sample Minimum Sample



# Dashboard Summary

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



Topic	Dec 2025 South East Water Community Agreement %	+/- difference % South East Water Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % South East Water vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	34%	9%	33%	1%
Recent Experience (Positive recent experience)	38%	9%	46%	-8%
General outlook (Positive outlook)	47%	8%	49%	-2%
Communication (Fair/good communication)	47%	13%	38%	9%
Brand Connection (someone I'd really like & have a lot in common with)	20%	-4%	31%	-11%
Brand Momentum (salience) (on its way up/has a lot going for it)	9%	-7%	22%	-13%
Trust (a great deal/some trust)	30%	-9%	53%	-23%
Past 4 Week Interaction	50%	11%	40%	10%
Past 4 Week Disruption	6%	-3%	6%	0%
Past 4 Week Water Quality Issues	6%	-2%	6%	0%
Past 4 Week Sewerage issues	5%	-1%	3%	2%
Overall Value for Money	39%	8%	46%	7%
Overall Satisfaction – Water (satisfied, scoring 7-10)	47%	10%	58%	-11%
Colour & Appearance	77%	1%	83%	-6%
Taste & Smell	77%	3%	77%	0%
Safety of Drinking Water	77%	1%	79%	-2%
Reliability of Supply	69%	-9%	87%	-18%
Water Pressure	75%	1%	77%	-2%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

# Executive Summary

## Overview of Key Findings

### Barometer

- Overall satisfaction and value for money remain below the industry average, with reliability of supply scoring much lower than other water service measures.
- Brand connection, momentum and most significantly trust scores are also below the industry average, reflecting weak customer confidence. High neutral sentiment suggests an opportunity to rebuild trust through clearer communication and more visible, consistent service delivery.

### Spotlight

- Customer behaviour suggests a strong response to drought conditions, supported by high awareness of restrictions and voluntary measures. Communication remains an important lever to ensure consistent understanding across all customers.
- Customers look to South East Water to lead on drought management, but lower confidence in the effectiveness of plans highlights the need for stronger reassurance around how drought risks are being managed.

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

**6.13/10 vs 6.57/10 (Total)**

## Why do South East Water customers feel this way?

Customer views of South East Water are mixed, with many reporting no major day-to-day supply issues but satisfaction held back by strong concerns about rising costs, poor communication and inconsistent customer service.



**Accountability call out:** We will be running an ad-hoc Accountability Session at the start of February relating to water supply problems. We will gather customer views on what improvements South East Water can make.

Total Base Size: 822  
South East Water Base Size: 64



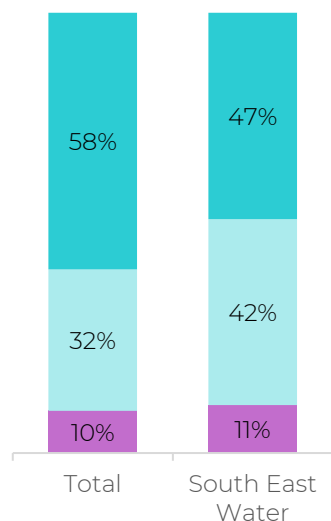
# South East Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr

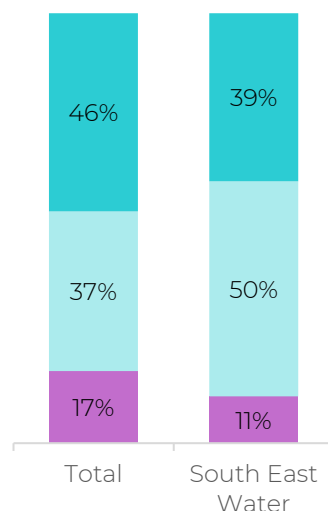
47% are satisfied with South East Water overall  
11% are not satisfied

Overall Satisfaction - Water



39% are satisfied with value for money  
11% are not satisfied

Overall Value for Money Satisfaction



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

Overall satisfaction and value for money remain below the industry average. Perceptions are shaped by concerns around reliability of supply, restrictions and confidence in how issues are managed, rather than day-to-day water quality alone.

Negative perceptions are strongly influenced by wider awareness of service issues and restrictions, including experiences reported in Tunbridge Wells, even where customers have not been directly affected.

## Why have you given this overall satisfaction score on water?

*"I keep on hearing bad news about them"*

*Female, 42, lives with partner/spouse, South East Water, 5/10 satisfaction score*

*"I live in Tunbridge Wells and although my water was unaffected, other people I know have lost huge amounts of money with the closure of their businesses."*

*Male, 66,  
Lives alone, South East Water, 0/10 satisfaction score*

*"It is the restrictions that make it a lower score."*

*Male, 49, lives with child/children, South East Water, 6/10 satisfaction score*

Lower satisfaction reflects concerns around reliability, prolonged restrictions and how issues are managed, rather than everyday service quality. Clearer and more consistent communication during incidents will be key to rebuilding consumer confidence.

Total Base Size: 822  
South East Water Base Size: 64



# South East Water: Barometer Findings

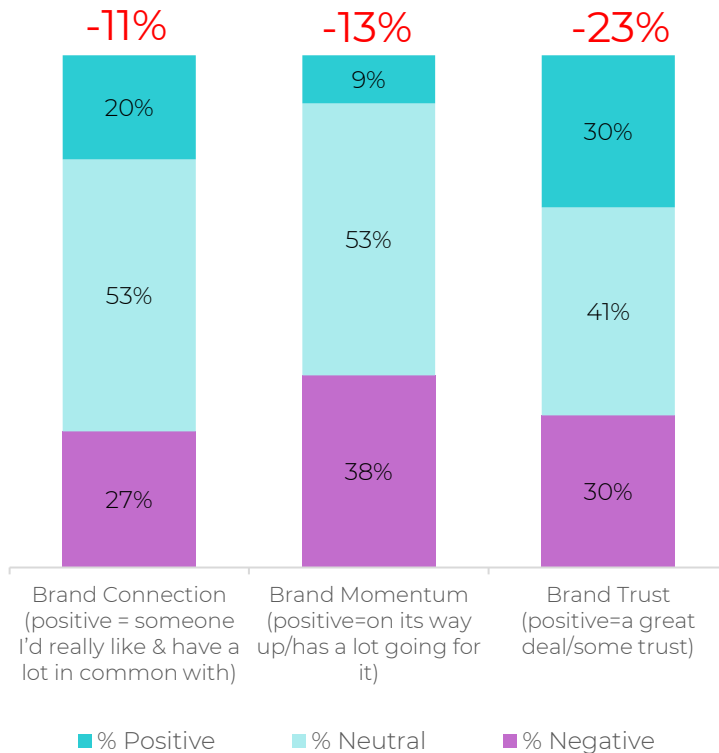
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of South East Water in relation to  
Connection, Momentum & Trust



% Who agree that South East Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	33%	0%	-18%
Improves our rivers	22%	0%	-6%
Creates a greener future	25%	0%	-8%
Spends customers' money wisely	27%	+7%	-2%
Contributes to our communities	28%	+2%	-11%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	47%	+10%	-11%
Colour & Appearance	77%	+1%	-6%
Taste & Smell	77%	+3%	0%
Safety of Drinking Water	77%	+1%	-2%
Reliability of Supply	69%	-9%	-18%
Water Pressure	75%	+1%	-2%

Brand connection, momentum and most significantly trust are well below the industry average, with high neutral scores suggesting customers are unconvinced progress is being made. More visible evidence of action and delivery will be key to shifting sentiment.

Total Base Size: 822  
South East Water Base Size: 64



# South East Water: Spotlight Findings

Drought



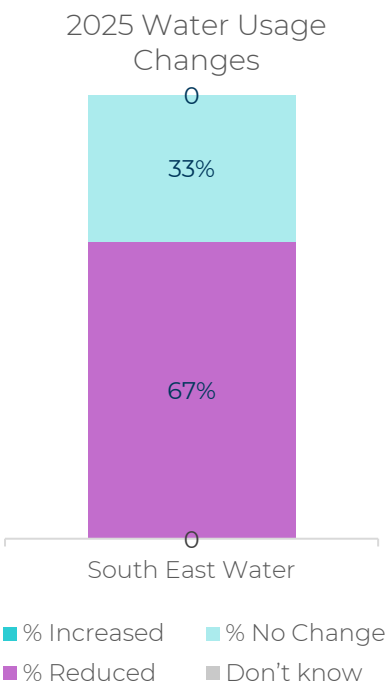
The voice for water consumers  
Llais defnyddwyr dŵr

67% of South East Water customers report reducing the amount of water they used during 2025. Awareness of drought-related measures is relatively high, with over half recalling a request to voluntarily reduce water use and a large majority (71%) aware of a temporary use ban.

*"I stopped watering plants from the tap & only used water from the rain barrel for that purpose. The grass became totally brown but we were able to keep our flowering plants alive"*

Male, 75

Drought Awareness	% Aware
A prolonged dry weather warning or notice	37%
An official drought declaration	23%
A temporary use ban (e.g., hosepipe ban)	71%
A request from my water company to voluntarily reduce water use	54%
A non-essential use ban affecting businesses	11%
A drought recovery update (e.g., when restrictions eased)	7%
I am not aware of anything being issued in my area	13%



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. Needed to reduce water use at home - 51%
- 2. Limitations on outdoor water use (such as washing your car, using drinking water on the garden)- 49%
- 3. Affected garden- 44%
- 4. Felt worried about future water shortages- 37%

A temporary use ban was in place in 2025

Customer behaviour suggests a strong response to drought conditions, supported by high awareness of restrictions and voluntary measures. Communication remains an important lever to ensure consistent understanding across all customers.

Total Base Size: 822  
South East Water Base Size: 64



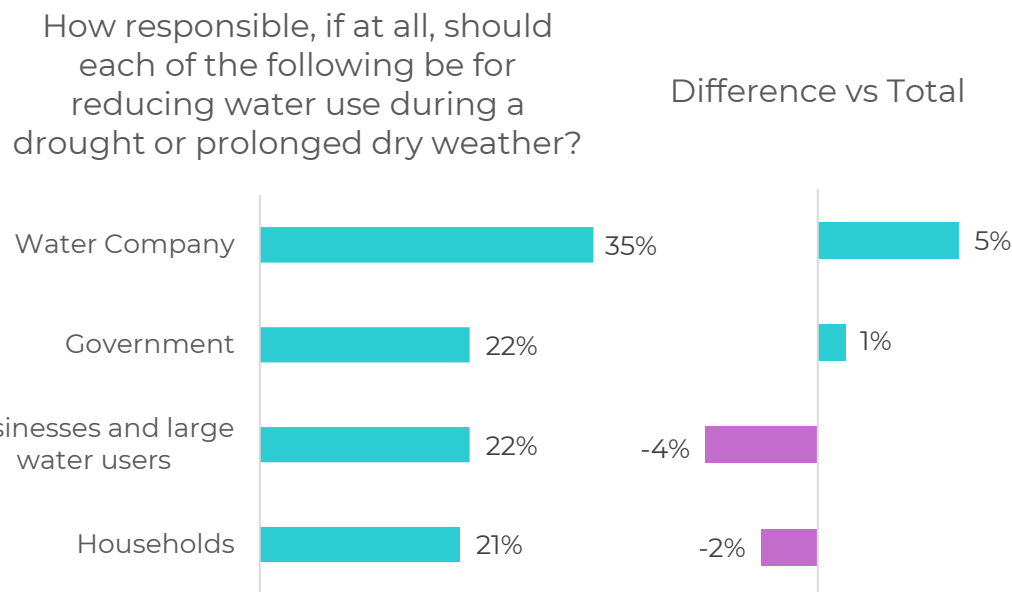
# South East: Spotlight Findings

## Drought



The voice for water consumers  
Llais defnyddwyr dŵr

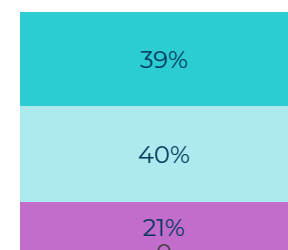
For South East Water customers, the water company is perceived to be the primary party responsible for reducing water usage during drought, with responsibility placed less strongly on businesses, households and government. This reflects expectations that South East Water should lead action during dry periods, while other groups playing a supporting role.



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

South East Water Drought Communication

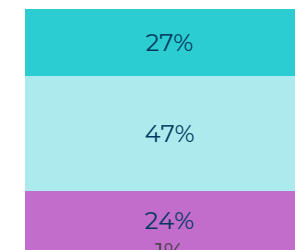
4%



■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that South East Water have effective plans

-16%



■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

What support could South East Water provide?

1. Clear updates on the current water resource situation in my area: 37%
2. Early warning messages when dry weather conditions begin: 36%
3. Free or discounted water-saving devices (e.g., water butts, shower timers): 29%

Customers look to South East Water to lead on drought management, but lower confidence in the effectiveness of plans highlights the need for clearer communication and stronger reassurance around how drought risks are being managed.

Total Base Size: 822  
South East Water Base Size: 64





The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**South Staffs Water and Cambridge Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](https://ccw.org.uk)

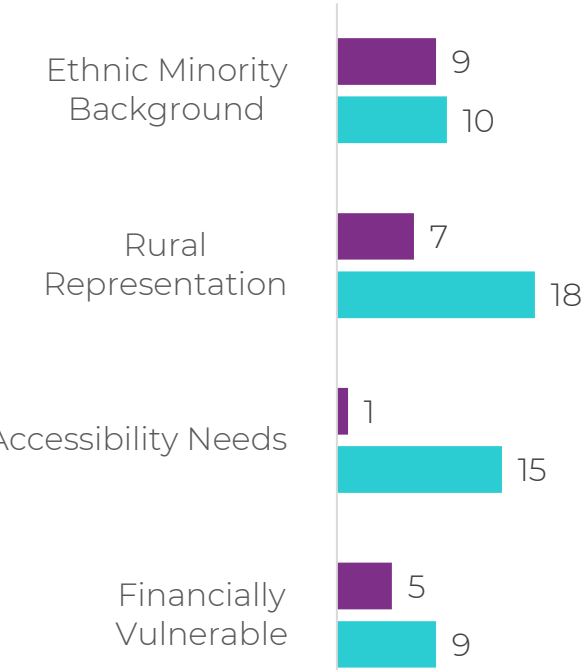
# South Staffs Water and Cambridge Water

Community population



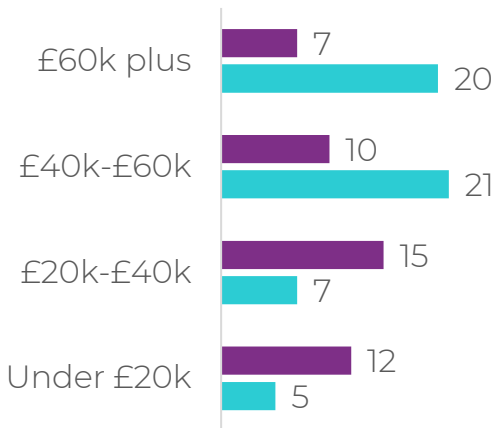
South Staffs Water Community members: 31  
Cambridge Water Community members: 22

Inclusivity

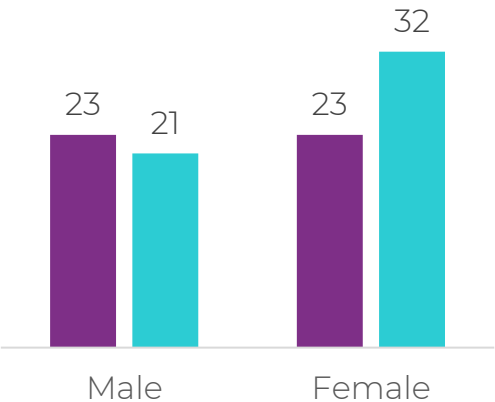


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

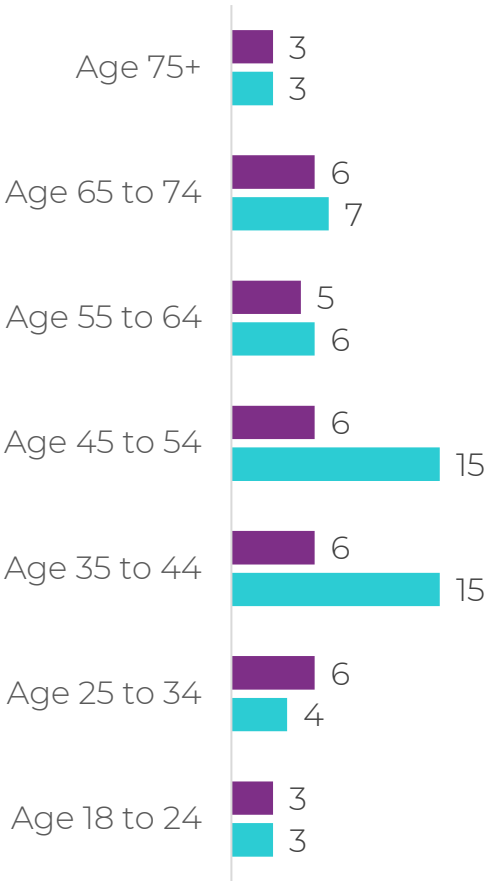
Household income



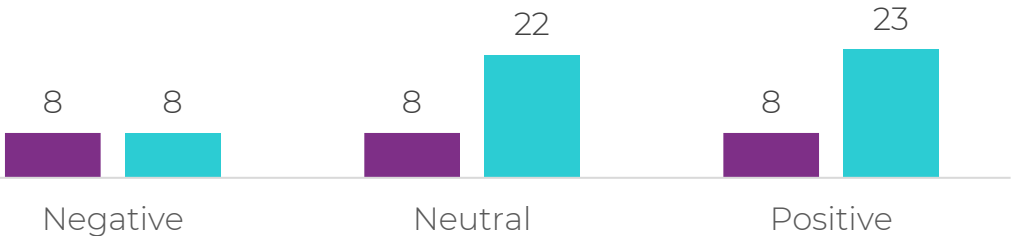
Gender



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 Sample, however when combined with customers who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable customers is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs.

Current Sample Minimum Sample

# Dashboard Summary

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



Topic	Dec 2025 South Staffs and Cambridge Water Community Agreement %	+/- difference % South Staffs and Cambridge Water Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % South Staffs and Cambridge Water vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	28%	1%	33%	-5%
Recent Experience (Positive recent experience)	38%	0%	46%	-8%
General outlook (Positive outlook)	47%	-1%	49%	-2%
Communication (Fair/good communication)	26%	8%	38%	-12%
Brand Connection (someone I'd really like & have a lot in common with)	32%	11%	31%	1%
Brand Momentum (salience) (on its way up/has a lot going for it)	15%	6%	22%	-7%
Trust (a great deal/some trust)	62%	10%	53%	9%
Past 4 Week Interaction	26%	-3%	40%	-14%
Past 4 Week Disruption	3%	-2%	6%	-3%
Past 4 Week Water Quality Issues	10%	1%	6%	4%
Past 4 Week Sewerage issues	3%	-3%	3%	0%
Overall Value for Money	47%	2%	46%	1%
Overall Satisfaction – Water (satisfied, scoring 7-10)	62%	-2%	58%	4%
Colour & Appearance	85%	-3%	83%	2%
Taste & Smell	83%	3%	77%	6%
Safety of Drinking Water	83%	1%	79%	4%
Reliability of Supply	90%	2%	87%	3%
Water Pressure	72%	-1%	77%	-5%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

Total Base Size: 822 and South Staffs and Cambridge Water Base Size: 53

# Executive Summary

## Overview of Key Findings



### Barometer

- Overall satisfaction is supported by reliable day-to-day service and good water quality, with low dissatisfaction levels. Relatively high neutral scores on value suggest customers would welcome clearer information around pricing to build understanding and confidence.
- In line with wave 1, South Staffs Water and Cambridge Water perform well on brand connection and trust but low brand momentum and high neutral scores on this measure indicates a need for clearer communication around ongoing activity and future plans.

### Spotlight

- Customer behaviour shows a mixed response to drought conditions, with some reducing water use while many report no change, reflecting varied engagement across the customer base.
- Lower confidence in drought communication and the effectiveness of plans indicates customers lack clarity on how drought risks are being managed, highlighting the need for clearer, more visible updates and practical support.

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

**6.92/10 vs 6.57/10 (Total)**

### Why do customers feel this way?

Customers describe South Staffs Water and Cambridge Water as providing a reliable service with good water quality and few day-to-day supply issues. Negative feedback is typically limited and focused on rising bills, communication and clarity around charging and investment, alongside some localised concerns around leaks, water pressure and hard water.



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

Total Base Size: 822  
South Staffs Water and Cambridge  
Water Base Size: 53

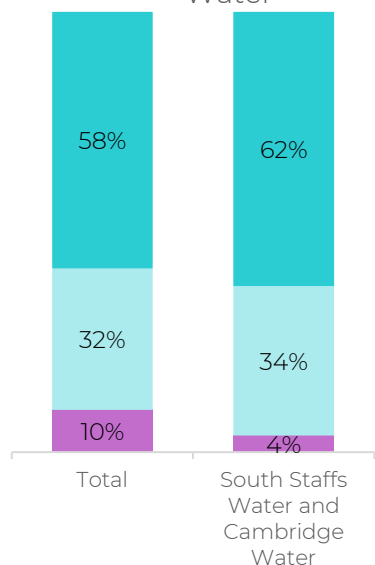
# South Staffs Water and Cambridge Water : Barometer Findings



62% are satisfied with South Staffs Water and Cambridge Water overall

4% are not satisfied

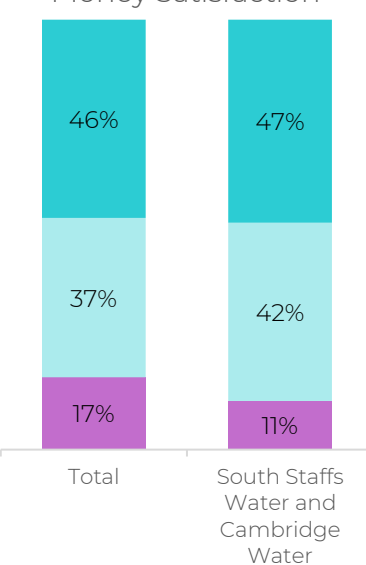
Overall Satisfaction - Water



47% are satisfied with value for money

11% are not satisfied

Overall Value for Money Satisfaction



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

Overall satisfaction with South Staffs and Cambridge Water is broadly aligned with industry averages and consistent with wave 1 scores, with a slight reduction in customers claiming to be unsatisfied with the service provided.

Value for money perceptions are also consistent with wave 1 and industry averages with fewer than average rating this as 'unsatisfactory' than industry standards.

## Why have you given this overall satisfaction score on water?

*"I scored halfway because of the recent rise in water bills which seem too much of an increase."*

*Female, 78, Lives alone, Cambridge Water, 5/10 satisfaction score*

*"No major issues or negative experiences but don't know what my payments go toward to make it feel like value for money"*

*Female, 46, Lives with partner/spouse, South Staffs Water, 7/10 satisfaction score*

*"There are very few service interruptions and quality is normally very good."*

*Male, 66, Lives with partner/spouse, Cambridge Water, 9/10 satisfaction score*

Overall satisfaction is supported by reliable day-to-day service and good water quality, with low dissatisfaction levels. Relatively high neutral scores on value suggest customers would welcome clearer information around pricing to build understanding and confidence

Total Base Size: 822  
South Staffs Water and Cambridge Water Base Size: 53



# South Staffs Water and Cambridge Water: Barometer Findings

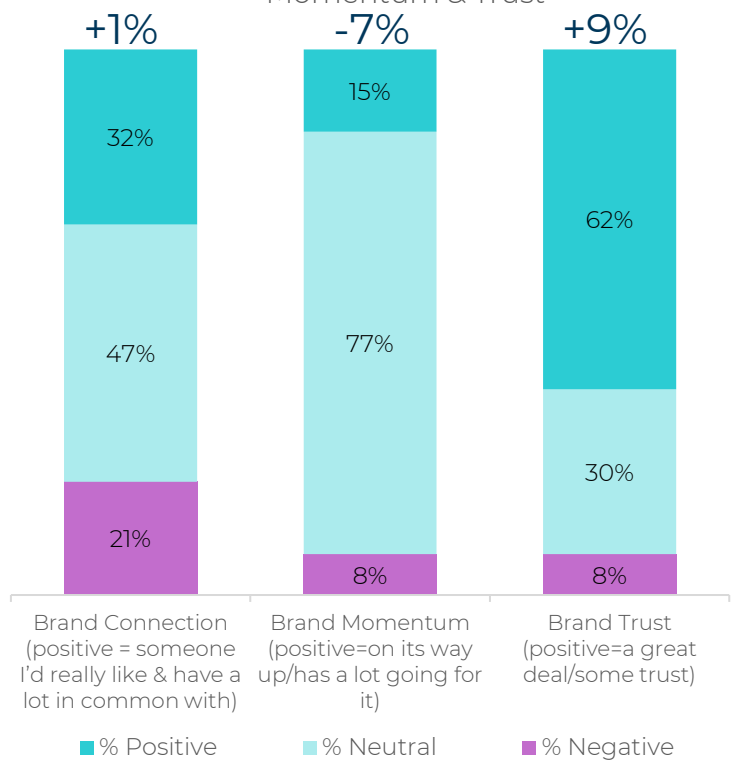
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of South Staffs Water and Cambridge Water in relation to Connection, Momentum & Trust



% Who agree that South Staffs Water and Cambridge Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	55%	+16%	+4%
Improves our rivers	25%	+12%	-3%
Creates a greener future	32%	+12%	-1%
Spends customers' money wisely	27%	+18%	-2%
Contributes to our communities	30%	+12%	-9%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	62%	-2%	+4%
Colour & Appearance	85%	-3%	+2%
Taste & Smell	83%	+3%	+6%
Safety of Drinking Water	83%	+1%	+4%
Reliability of Supply	90%	+2%	+3%
Water Pressure	72%	-1%	-5%

In line with wave 1 South Staffs Water and Cambridge Water perform well on brand connection and trust but low brand momentum and high neutral scores on this measure indicates a need for clearer communication around ongoing activity and future plans.

Total Base Size: 822  
South Staffs Water and Cambridge Water Base Size: 53





# South Staffs Water and Cambridge Water: : Spotlight Findings

Drought



The voice for water consumers  
Llais defnyddwyr dŵr

While 40% of South Staffs Water and Cambridge Water customers report reducing their water use during 2025, almost half say their behaviour did not change. Awareness of drought-related measures remains low, with two-thirds of customers unaware of any communications being issued in their area and only a minority recalling formal warnings or requests to reduce usage.

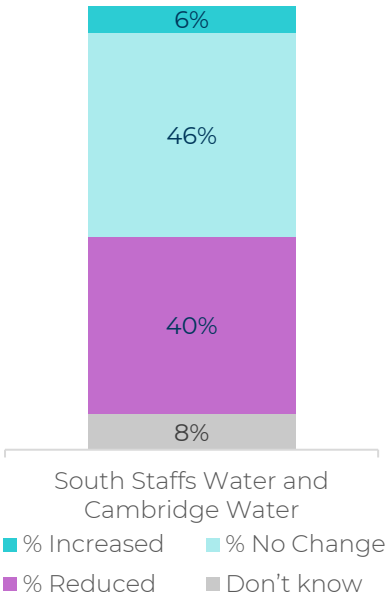
*“There was not a hosepipe ban or restriction in my area. However, I took steps to save water. I saved water from the house to use in my garden”*

*Female, 68, South Staffs Water*

Drought Awareness	% Aware
A prolonged dry weather warning or notice	19%
An official drought declaration	4%
A temporary use ban (e.g., hosepipe ban)	6%
A request from my water company to voluntarily reduce water use	25%
A non-essential use ban affecting businesses	-
A drought recovery update (e.g., when restrictions eased)	2%
I am not aware of anything being issued in my area	67%

No temporary use ban was in place in 2025

2025 Water Usage Changes



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. Affected Garden- 42%
- 2. Felt worried about environmental impacts (e.g., low river or reservoir levels, effects on wildlife)- 38%
- 3. Affected garden- 44%
- 4. Felt worried about future water shortages- 29%

Customer behaviour shows a mixed response to drought conditions, with some reducing water use while many report no change, reflecting varied engagement across the customer base.

Total Base Size: 822  
South Staffs Water and Cambridge Water Base Size: 53

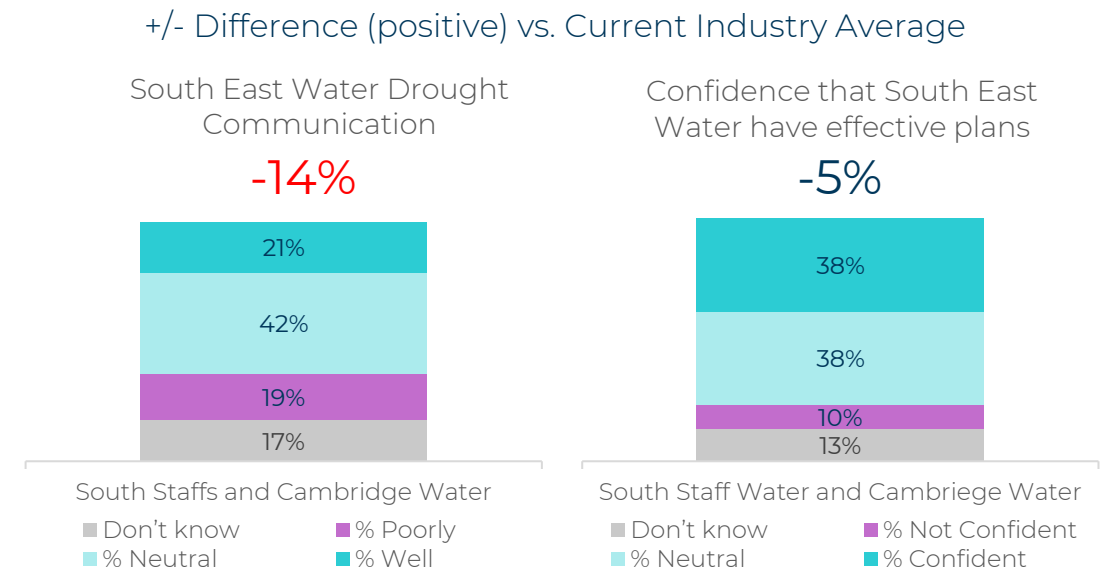
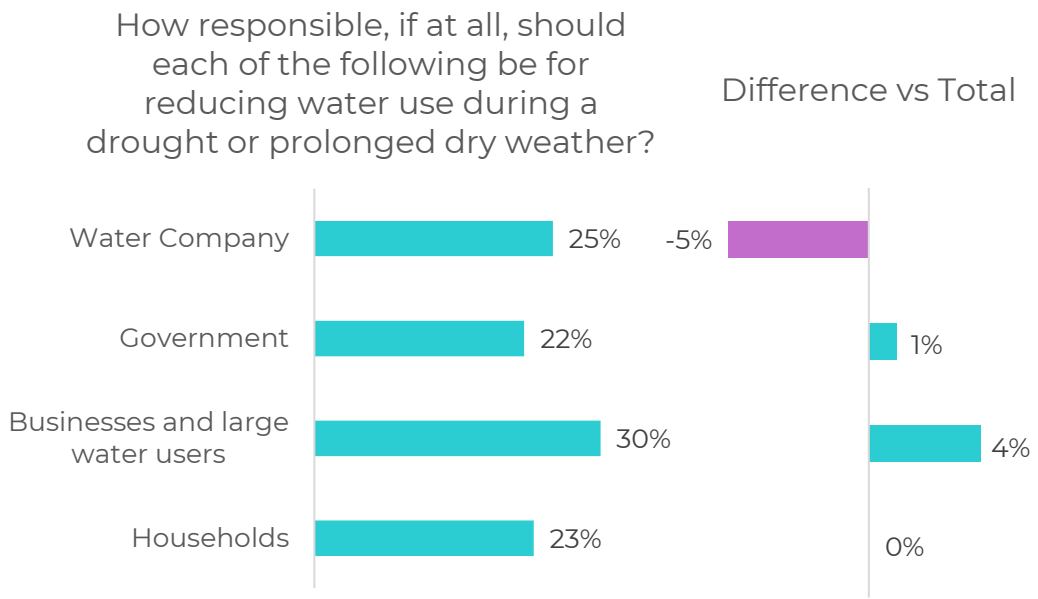


# South Staffs Water and Cambridge Water: Spotlight Findings

## Drought



For South Staffs Water and Cambridge Water customers, responsibility for reducing water usage during drought is more evenly distributed, with businesses and large water users seen as most responsible, followed by the water company. Households and government are viewed as playing more supporting roles, indicating less expectation for the company to lead drought action compared with other regions.



### What support could South Staffs Water and Cambridge Water provide?

- 1. Clear updates on the current water resource situation in my area: 37%
- 2. Free or discounted water-saving devices (e.g., water butts, shower timers) 37%
- 3. Practical water-saving tips tailored to households: 35%

Lower confidence in drought communication and the effectiveness of drought plans indicates customers lack clarity on how drought risks are being managed, highlighting the need for clearer, more visible updates and practical support.

Total Base Size: 822  
South Staffs Water and Cambridge Water Base Size: 53



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer & Spotlight Report

**SES Water**

December 2025

Delivered by Taylor McKenzie  
Research & Energy Saving Trust

Version: Final 20.01.26

[ccw.org.uk](http://ccw.org.uk)

# SES Water

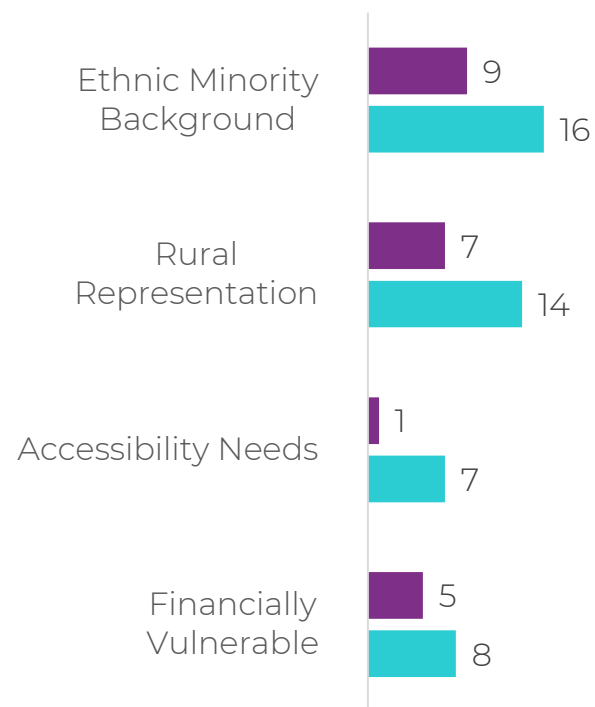
Community population



The voice for water consumers  
Llais defnyddwyr dŵr

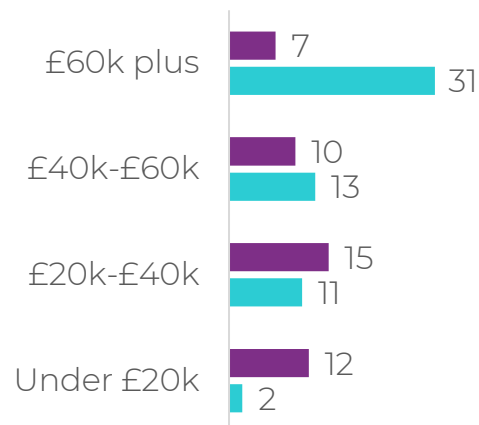
SES Water Community members: 58

## Inclusivity

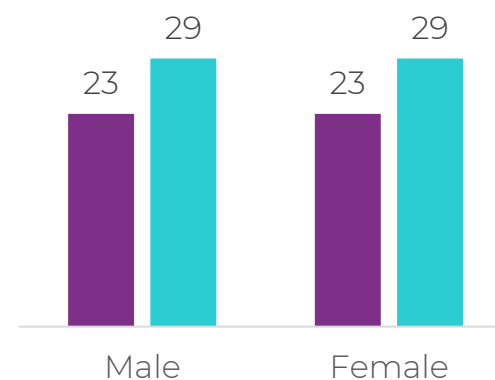


Note: Inclusivity percentage may not total 100% because respondents could select more than one answer (multiple-choice question).

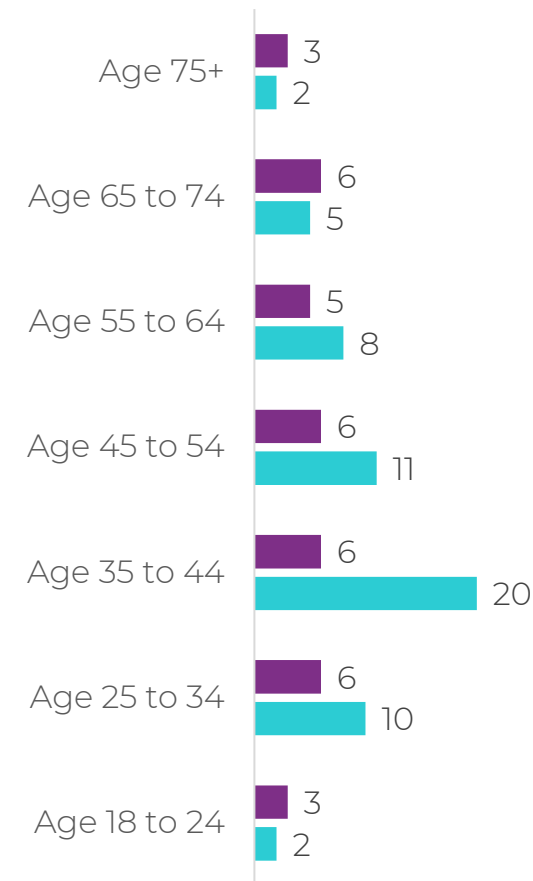
## Household income



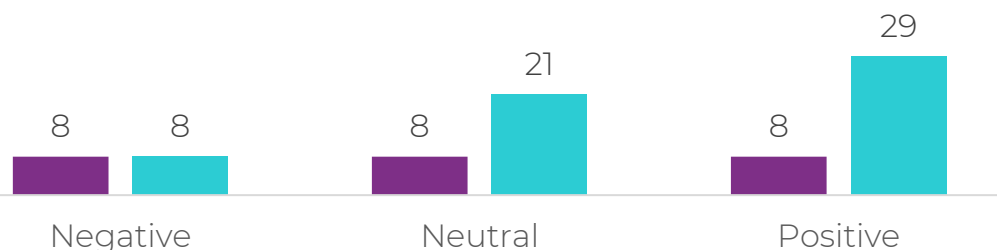
## Gender



## Age



## Attitude to Water company



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

Current Sample Minimum Sample

# Dashboard Summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Dec 2025 SES Water Community Agreement %	+/- difference % SES Water Community Nov vs Dec	Dec 2025 Total Community Agreement %	+/- difference % SES Water vs. Total Community Dec 2025
Responsiveness (Always/often responsive)	48%	6%	33%	15%
Recent Experience (Positive recent experience)	52%	0%	46%	6%
General outlook (Positive outlook)	55%	1%	49%	6%
Communication (Fair/good communication)	43%	7%	38%	5%
Brand Connection (someone I'd really like & have a lot in common with)	47%	12%	31%	16%
Brand Momentum (salience) (on its way up/has a lot going for it)	29%	-3%	22%	7%
Trust (a great deal/some trust)	52%	-2%	53%	-1%
Past 4 Week Interaction	48%	15%	40%	8%
Past 4 Week Disruption	5%	-3%	6%	-1%
Past 4 Week Water Quality Issues	7%	-3%	6%	1%
Past 4 Week Sewerage issues	7%	5%	3%	4%
Overall Value for Money	57%	9%	46%	11%
Overall Satisfaction – Water (satisfied, scoring 7-10)	67%	9%	58%	9%
Colour & Appearance	71%	-8%	83%	-12%
Taste & Smell	74%	5%	77%	-3%
Safety of Drinking Water	72%	1%	79%	-7%
Reliability of Supply	85%	4%	87%	-2%
Water Pressure	76%	3%	77%	-1%

This dashboard presents directional insight from a small, engaged panel of ~50 and is intended to highlight emerging themes, to help shape the Accountability Sessions, rather than measure statistical performance.

# Executive Summary

## Overview of Key Findings



### Barometer



- Satisfaction and value for money scores have increased since wave 1 and now sit above the industry average. While neutral scores have reduced, they still indicate there is opportunity to strengthen confidence through clearer communication on bills, investments and service delivery
- SES Water score well above average industry scores on brand connection, and inline with average scores on trust and momentum. As with Wave 1, improving water quality performance should help to further increase brand metrics.

### Spotlight



- Despite strong reported behaviour change, low recall of local drought communications suggests SES Water could strengthen visibility and local relevance of drought messaging, particularly if investments made to boost resilience are a 'good news story'.
- Lower confidence in drought communication highlights the need for clearer, earlier updates of warning messages and practical support to build customer understanding and confidence.

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

**7.02/10 vs 6.57/10 (Total)**

## Why do SES water customers feel this way?

Customers describe SES Water as delivering reliable, good-quality water with few disruptions, but increasingly frame satisfaction around concerns about rising costs, clarity on charges, and a lack of clear, proactive communication – particularly around service changes and restrictions.



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

Total Base Size: 822  
SES Water Base Size: 58





# SES Water: Barometer Findings

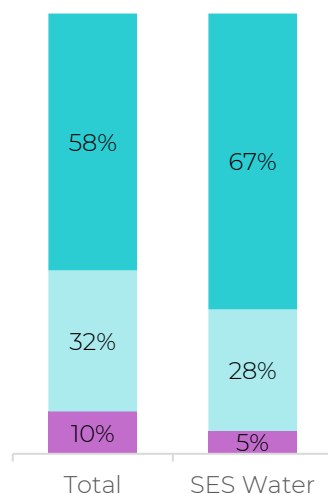


The voice for water consumers  
Llais defnyddwyr dŵr

67% are satisfied with  
SES Water overall

5% are not satisfied

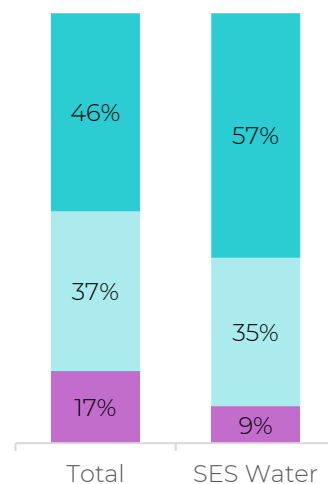
Overall Satisfaction  
- Water



57% are satisfied with  
value for money

9% are not satisfied

Overall Value for  
Money Satisfaction



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

Satisfaction with SES Water has strengthened, with two-thirds of customers now satisfied overall and very few reporting dissatisfaction.

Value for money perceptions have also improved, with an increase in customers rating this positively. However, high neutral scores and more claiming they are 'not satisfied' in this wave suggests this should be an area of focus

## Why have you given this overall satisfaction score on water?

*"I don't have any issues with them. I have had no disruptions to service. I pay each half year by direct debit and always get my bill in advance."*

*Female, 44,  
Live with child/children, SES  
Water, 10/10 satisfaction score*

*"Bills have risen and it feels that it pays for bonuses at the top"*

*Female, 34, lives with  
partner/spouse, SES Water,  
7/10 satisfaction score*

*"Holding its own but they need to do more for local community and comms needs to be better"*

*Male, 52, lives with  
partner/spouse, SES Water,  
7/10 satisfaction score*

Satisfaction and value for money scores have increased since wave 1 and now sit above the industry average. While neutral scores have reduced, they still indicate there is opportunity to strengthen confidence through clearer communication on bills, investments and service delivery.

Total Base Size: 822  
SES Water Base Size: 58



# SES Water: Barometer Findings

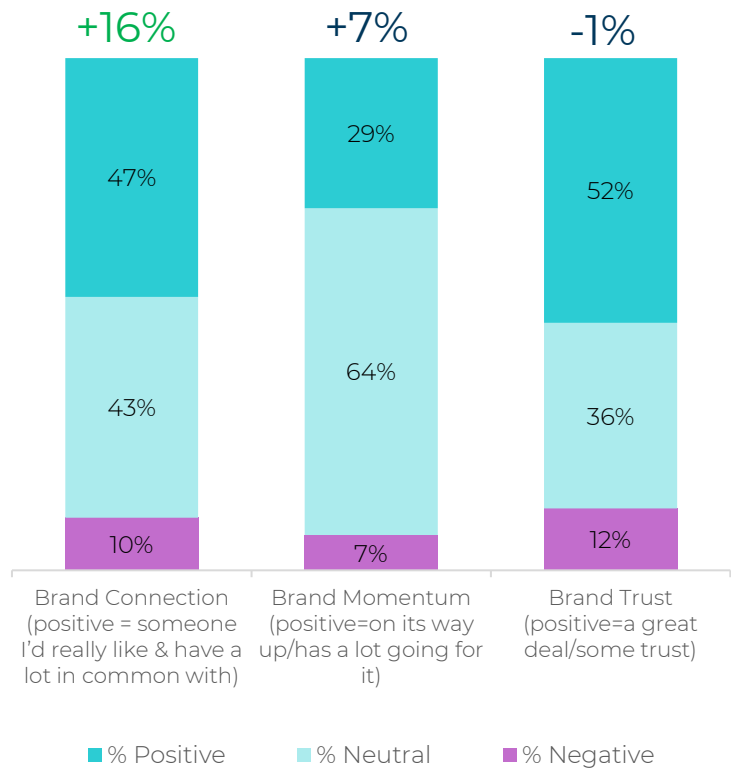
Brand perceptions & performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

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



% Who agree that SES Water...	December	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all customers	60%	+10%	+9%
Improves our rivers	36%	+11%	+8%
Creates a greener future	50%	+13%	+17%
Spends customers' money wisely	47%	+22%	+18%
Contributes to our communities	53%	+20%	+14%

% Satisfied with...	December	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	67%	+9%	+9%
Colour & Appearance	71%	-8%	-12%
Taste & Smell	74%	+5%	-3%
Safety of Drinking Water	72%	+1%	-7%
Reliability of Supply	85%	+4%	-2%
Water Pressure	76%	+3%	-1%

SES Water score well above average industry scores on brand connection, and inline with average scores on trust and momentum. As with Wave 1, improving water quality performance should help to further increase brand metrics.

Total Base Size: 822  
SES Water Base Size: 58



# SES Water: Spotlight Findings

Drought

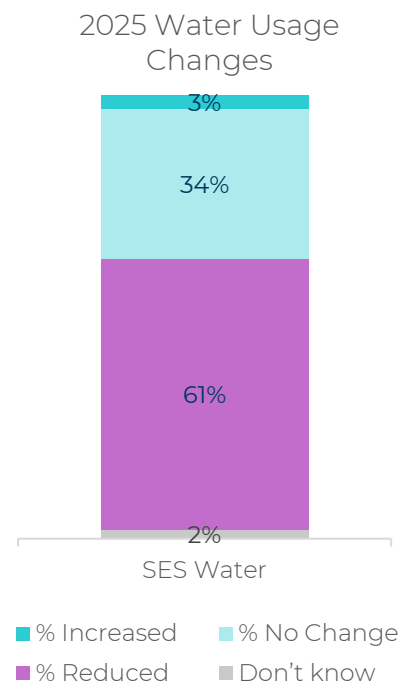


61% of SES Water customers say they reduced their water use in 2025, while 34% reported no change. Awareness of drought-related measures is mixed, with 51% not aware of anything being issued in their area. One third of customers recall specific communications around this time requesting customers to voluntarily reduce use but no hose pipe ban was in place.

*“I wasn't impacted very much except for adhering to the voluntary request to reduce water use from SES water, which the family complied with.”*

*Male, 43, Lives with partner/spouse*

Drought Awareness	% Aware
A prolonged dry weather warning or notice	15%
An official drought declaration	7%
A temporary use ban (e.g., hosepipe ban)	20%
A request from my water company to voluntarily reduce water use	32%
A non-essential use ban affecting businesses	3%
A drought recovery update (e.g., when restrictions eased)	5%
I am not aware of anything being issued in my area	51%



In what ways, if any, did drought or prolonged dry weather during 2025 affect you / your household?

- 1. No impact on me / my household- 39%
- 2. Affected garden- 22%
- 3. Felt worried about future water shortages – 22%
- 4. Needed to reduce water use at home - 20%

No temporary use ban was in place in 2025

Despite strong reported behaviour change, low recall of local drought communications (51% unaware) suggests SES Water could strengthen visibility and local relevance of drought messaging, particularly if investments made to boost resilience are a ‘good news story’.

Total Base Size: 822  
SES Water Base Size: 58



# SES Water: Spotlight Findings

## Drought

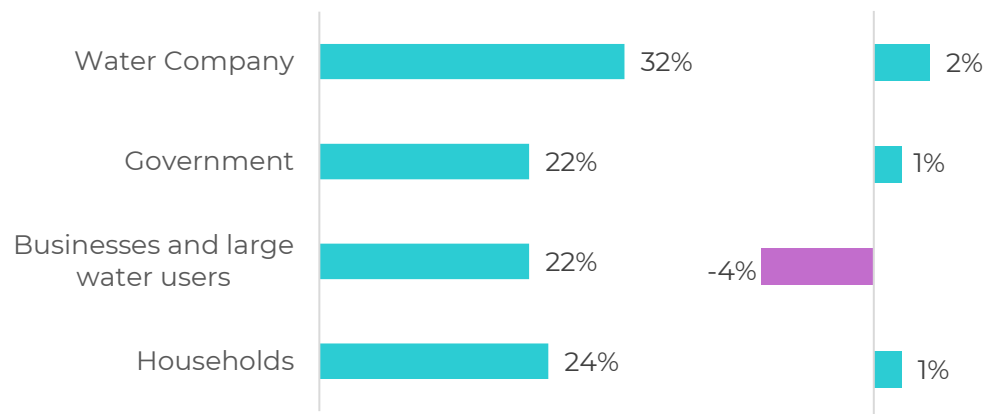


The voice for water consumers  
Llais defnyddwyr dŵr

For SES Water customers, responsibility for reducing water usage during a drought lies with the water company who they expect to lead this drought action. Businesses and large water users, household customer and government play an equally significant supporting role.

How responsible, if at all, should each of the following be for reducing water use during a drought or prolonged dry weather?

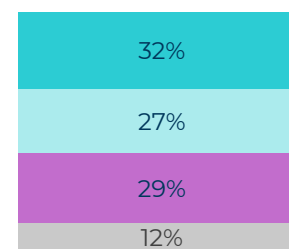
Difference vs Total



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

South East Water Drought Communication

-3%

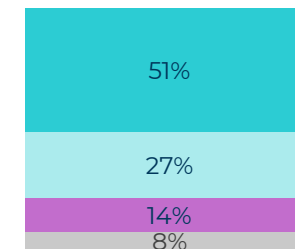


SES Water

■ Don't know  
■ % Neutral  
■ % Poorly  
■ % Well

Confidence that South East Water have effective plans

-8%



SES Water

■ Don't know  
■ % Neutral  
■ % Not Confident  
■ % Confident

What support could SES Water provide?

1. Clear updates on the current water resource situation in my area: 49%
2. Early warning messages when dry weather conditions begin: 29%
3. Regular reassurance about supply and service impacts & tools to help track my water use (e.g., online dashboard, app updates: 29%

Lower confidence in drought communication highlights the need for clearer, earlier updates, early warning messages and practical support to build customer understanding and confidence.

Total Base Size: 822  
SES Water Base Size: 58

CCW,  
23 Stephenson Street,  
Birmingham,  
B2 4BH

**ccw.org.uk**



The voice for water consumers  
Llais defnyddwyr dŵr