



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight report

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

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A young child with curly hair is shown in profile, drinking water from a clear glass. The child is wearing a checkered shirt. The background is a blurred indoor setting. A large, faint, stylized graphic of the letters 'CCW' is overlaid on the right side of the image.

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# Our Research Approach

# Objectives



The Water Voice **Barometer** and **Spotlight** activities capture community members' 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 community members' priorities over time.



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

This month's **Spotlight** focuses **prioritising topics** to bring to our upcoming **Accountability Sessions** alongside **Billing and Value for Money**, exploring how community members understand their bills and perceive rising costs.

Next month's **Spotlight** will focus on **refining topics** for our **Accountability Sessions** alongside **Customer Service** and communication, awareness, and experience of support services.

## Key objectives:

- Ensure community members' feedback remains a consistent, evidence-based part of accountability and decision making across the water sector.
- Build a continuous picture of community members' 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

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Findings in this report are drawn from members of the Water Voice community, a diverse group of around 800 community members 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 community member 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 community member 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 community members.
- 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 community member's opinion.

# Progress in numbers

Our Water Voice achievements since our communities launched in November 2025



16 Water Voice Panels live across England and Wales

890 community members onboarded

828 community members actively participating

1 Getting to Know You survey completed

3 Spotlight surveys completed and 3 Barometer surveys completed

750+ responses per survey, on average

96% survey completion rate in January

12 community platform posts per month; over 36 posts delivered across Nov, Dec and Jan

100% of panels meeting KPI participation thresholds

0 missed reporting deadlines

1 successful ad hoc accountability session delivered: South East Water

16 Accountability Sessions scheduled (Spring 2026)

# Project update: a strong start for Water Voice



## Looking ahead

- Clear explanations shared on how Accountability Sessions work and the role community members will play, via the platform and panel manager emails
- February Barometer and Spotlight surveys launched, with Spotlight exploring community members' perceptions of customer service
- Community members asked to confirm priority issues they want to raise with their water company, ensuring sessions focus on what matters most
- Accountability topics finalised in February 2026, informed by Spotlight survey results
- First five Accountability briefing sessions scheduled for w/c 16 February 2026

*"Really enjoying the process so far, and there's some great people contributing. I think it's an eye opening for everyone inside, in so much as how to consider others: Experience, Life, Issues, Problems, Joys etc... There's plenty of Water related things, but also some real "human" things coming out in discussion"*

*Severn Trent  
community Member*

*"Being part of this panel has become very important to me, and it has prompted a lot discussion with my family about use of and conservation of water.*

*I would really like to be a part of the accountability panels, as I would like to ask about the water authorities having more involvement with consumers in projects, "letting us in" - not just informing us via bills, increasing water rates and telling us that there is a hosepipe ban. An 'us and them' situation is how it feels at the moment"*

*South West Water  
community Member*

# Sample

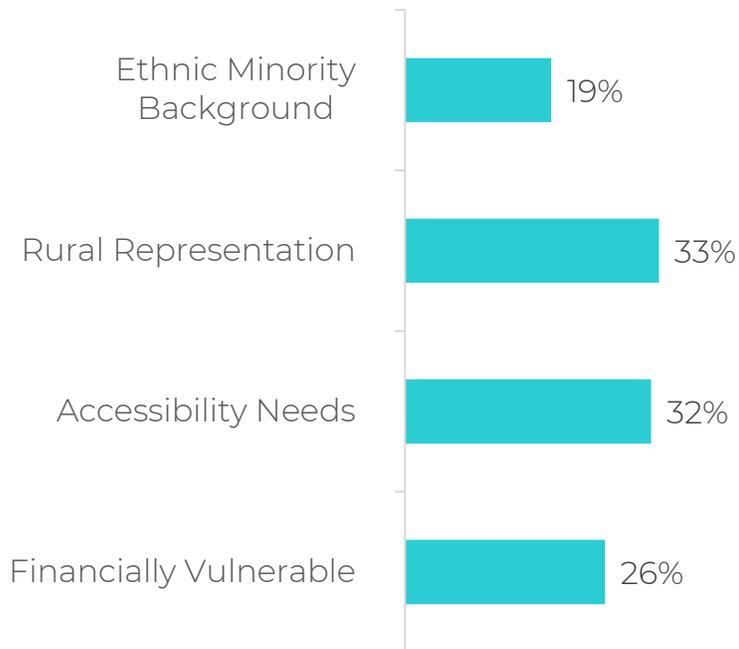
Water Voice sample in detail at total level across all 16 communities



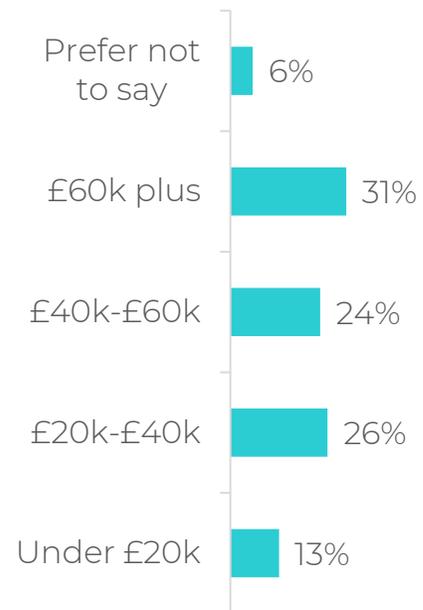
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**890** members onboarded  
**828** actively participated

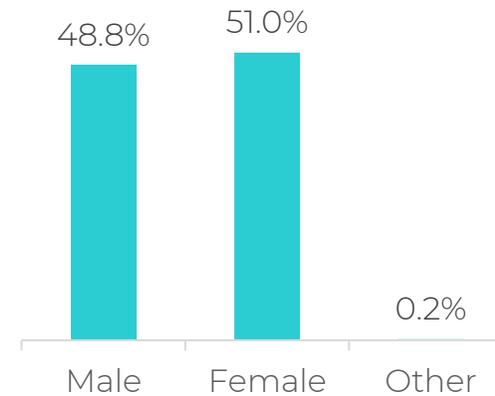
## Inclusivity



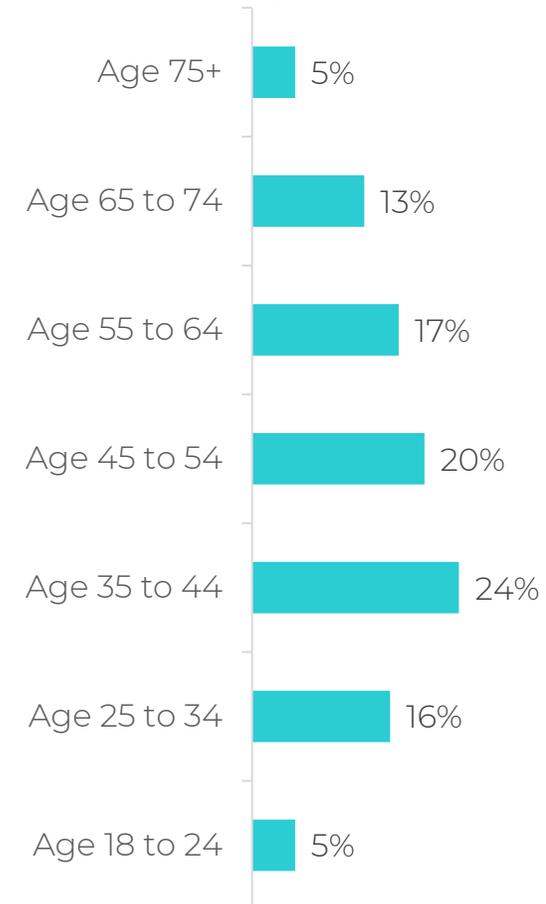
## Household income



## Gender



## Age



Note: Inclusivity indicators are derived from multiple profile questions and are presented independently, therefore results do not sum to 100%.

# Executive summary

Total results across all 16 communities



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Topic	Nov 2025 Total community Agreement %	Jan 2026 Total community Agreement %	+/- difference % Total community Nov vs Jan
Responsiveness (Always/often responsive)	29%	26%	-3%
Recent Experience (Positive recent experience)	42%	42%	0%
General outlook (Positive outlook)	46%	47%	+1%
Communication (Fair/good communication)	34%	35%	+1%
Brand Connection (someone I'd really like and have a lot in common with)	25%	29%	+4%
Brand Momentum (salience) (on its way up/has a lot going for it)	20%	23%	+3%
Trust (a great deal/some trust)	48%	48%	0%
Past 4 Week Interaction	39%	45%	+6%
Past 4 Week Disruption	5%	9%	+4%
Past 4 Week Water Quality Issues	7%	9%	+2%
Past 4 Week Sewerage issues	3%	4%	+1%
<b>Overall Value for Money (satisfied, scoring 7-10)</b>	40%	45%	+5%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	52%	58%	+6%
Colour and Appearance (satisfied, scoring 7-10)	82%	84%	+2%
Taste and Smell (satisfied, scoring 7-10)	75%	78%	+3%
Safety of Drinking Water (satisfied, scoring 7-10)	77%	79%	+2%
Reliability of Supply (satisfied, scoring 7-10)	87%	85%	-2%
Water Pressure (satisfied, scoring 7-10)	77%	79%	+2%
<b>Overall Satisfaction - Sewerage</b>	51%	57%	+6%
Reducing smells from sewage treatment works (satisfied, scoring 7-10)	31%	39%	+8%
Maintenance of sewerage pipes and treatment works (satisfied, scoring 7-10)	35%	41%	+6%
Cleaning wastewater properly before release back into environment (satisfied, scoring 7-10)	31%	36%	+5%
Minimising sewer flooding (satisfied, scoring 7-10)	30%	38%	+8%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828

# Core themes

## Community insights



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 **Reliable supply, good pressure, and acceptable water quality are often acknowledged.** However, these fundamentals are seen as the minimum expected standard rather than a reason for advocacy or stronger brand connection.

 While most community members report reliable supply and decent customer service, **trust is undermined** by concerns about pollution, leaks, executive pay, and whether rising bills are genuinely reinvested into infrastructure and environmental improvements.

 **Billing clarity and control are universal challenges.** Confusion around standing charges, wastewater splits, meter readings, and estimated usage. Many feel they lack control over their bill and want tools, alerts, or clearer breakdowns to manage costs.

 **Communication is key, especially around investment and environmental impact.** There is a clear opportunity to proactively show where money is going, demonstrate progress on leaks and river health, and make investment feel visible and local.

*“Clearer communication about how bills are used, visible investment in reducing leaks and environmental impact, and more reliable service would all help improve perceptions of value for money.”*

*26, Live with friends/housemates, Affinity Water*

*“Give a breakdown of how money is actually spent both in terms of percentage but also total amounts, and where relevant costs for large projects too.”*

*49, Live with family, Severn Trent Water*



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# Water Voice Barometer and Spotlight Report

**Affinity Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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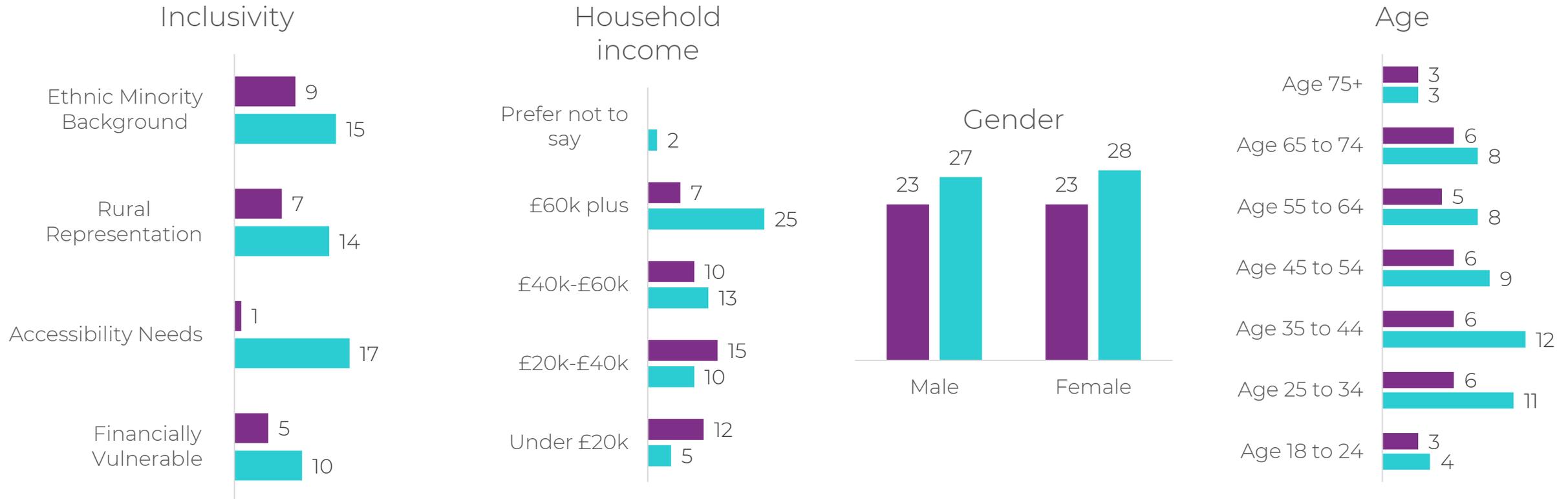
# Affinity Water

Community population



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Affinity Water community members: 55



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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



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Topic	Jan 2026 Affinity Water community Agreement %	+/- difference % Affinity Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Affinity Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	35%	+3%	26%	+8%
Recent Experience (Positive recent experience)	51%	+2%	42%	+9%
General outlook (Positive outlook)	51%	+9%	47%	+4%
Communication (Fair/good communication)	49%	+9%	35%	+14%
Brand Connection (someone I'd really like and have a lot in common with)	29%	+1%	29%	0%
Brand Momentum (salience) (on its way up/has a lot going for it)	27%	+6%	23%	+5%
Trust (a great deal/some trust)	53%	+5%	48%	+4%
Past 4 Week Interaction	38%	+6%	45%	-6%
Past 4 Week Disruption	9%	+5%	9%	0%
Past 4 Week Water Quality Issues	7%	+1%	9%	-2%
<b>Overall Value for Money</b>	53%	+11%	45%	+7%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	66%	-4%	58%	+8%
Colour and Appearance	86%	+3%	84%	+2%
Taste and Smell	73%	+3%	78%	-6%
Safety of Drinking Water	80%	+6%	79%	+1%
Reliability of Supply	86%	-4%	85%	+1%
Water Pressure	80%	+4%	79%	+1%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and  
 Affinity Water Base Size: 55

# Executive summary

Overview of key findings

**Affinity  
Water**

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## Barometer

- There is an opportunity to more clearly explain the reasoning behind price increases and highlight how money is being invested to improve service.
- Some positive improvements in sentiment towards Affinity Water since the first wave.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.
- Clear opportunity to address poor perceptions of fairness, value for money, and trust in keeping bills low. There is also an opportunity to more clearly demonstrate how bill increases will be invested to improve service.

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

**6.76/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is neutral to mildly positive, with most experiencing a reliable water supply but expressing growing concerns about rising prices, pressure issues, environmental impact, and limited visibility of what the company does beyond basic 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: 828 and  
Affinity Water Base Size: 55



# Affinity Water: Barometer findings



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66% are satisfied overall

6% are not satisfied

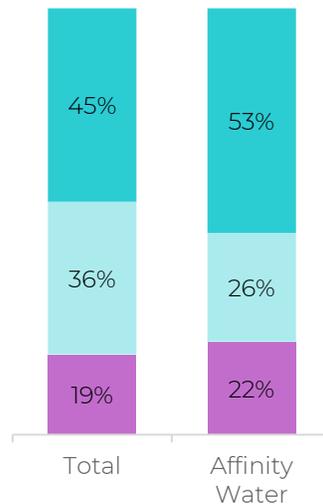
Overall satisfaction - water



53% are satisfied with value for money

22% are not satisfied

Overall value for money satisfaction



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

Overall satisfaction remains close to the industry average. Value for money satisfaction is also slightly higher than the average but increases in prices have caused some dissatisfaction when it comes to value for money.

## Why have you given this overall satisfaction score?

*“Affinity water provide good quality water for me and my house and it has good value for money. They attend to my needs anytime I reach out to them.”*

*Male, 35, Live with partner and child/ren, 9/10 satisfaction score*

*“Prices gone up with no explanation.”*

*Female, 45, Live with partner and child/ren, 1/10 satisfaction score*

*“Their water bills are very convenient and they have good water quality.”*

*Male, 25, Live with friends/housemates, 7/10 satisfaction score*

There is an opportunity to more clearly explain the reasoning behind price increases and highlight how money is being invested to improve service.

Total Base Size: 828  
Affinity Water Base Size: 55



# Affinity Water: Barometer findings

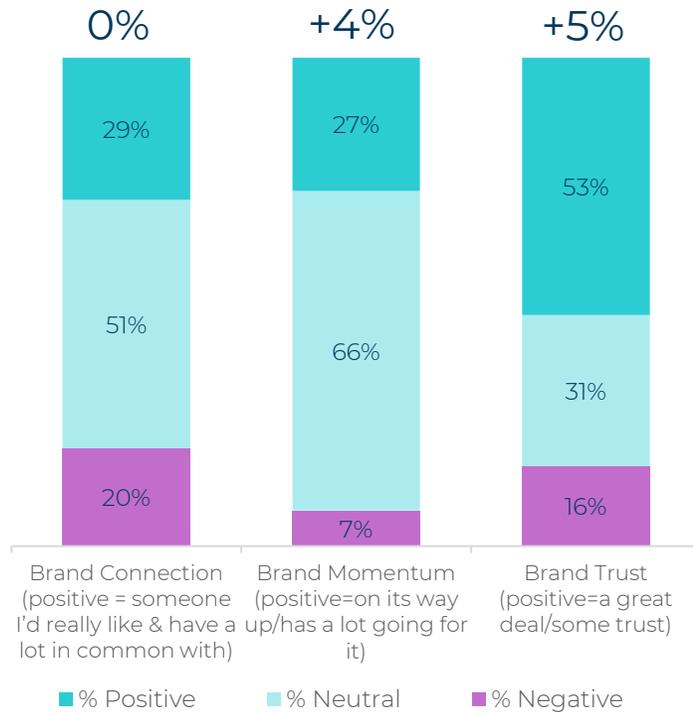
Brand perceptions and performance (satisfaction)



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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Affinity Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	53%	+14%	+7%
Improves our rivers	33%	+9%	+7%
Creates a greener future	35%	+9%	+6%
Spends community members' money wisely	27%	+10%	+2%
Contributes to our communities	31%	11%	-2%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	66%	-4%	+8%
Colour and Appearance	86%	+3%	+2%
Taste and Smell	73%	+3%	-6%
Safety of Drinking Water	80%	+6%	+1%
Reliability of Supply	86%	-4%	+1%
Water Pressure	80%	+4%	+1%

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

Some positive improvements in sentiment towards Affinity Water since the first wave.

Total Base Size: 828  
Affinity Water Base Size: 55



# Affinity Water: Spotlight findings

Billing and value for money



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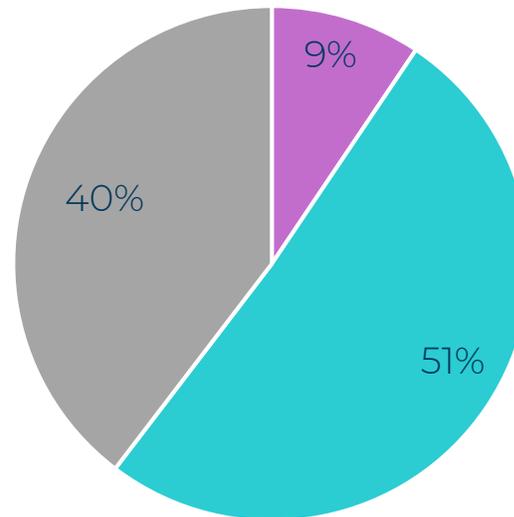
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

Select the 3 most important themes

1. Value for money and rising bills – 55%
2. Quality of drinking water – 40%
3. Reliability of water supply and pressure – 40%
4. Responsiveness when things go wrong – 40%

When asked to select the single most important topic, value for money and rising bills was most selected at 30%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (51%) are just looking at the charges on their bill, with 40% stating that they read the whole thing.

How charges are calculated (40%) and meter readings/ estimated usage (28%) were viewed as the most unclear parts of community members bills. 42% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	40%
Differences between water and wastewater charges	-
Meter readings / estimated usage	28%
Standing charges	17%
Comparison with previous bills	11%
Help or contact information	4%
Other	-
<b>None – my bill is clear</b>	<b>42%</b>

There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.

Total Base Size: 828  
Affinity Water Base Size: 55



# Affinity Water: Spotlight findings

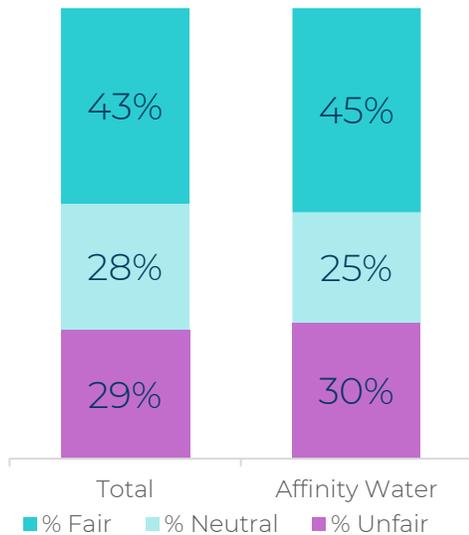
Billing and value for money



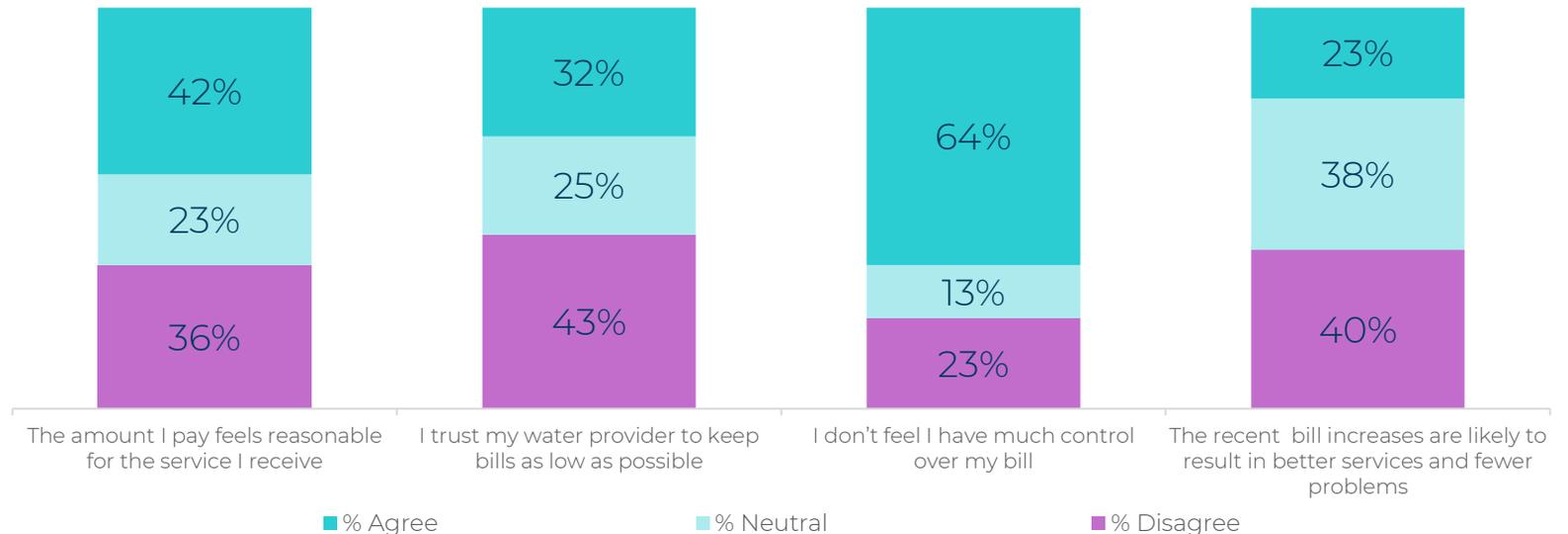
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45% of community members felt that the charges they pay are fair. 42% feel that the amount they pay feels reasonable for the service and 32% trust their water provider to keep bills as low as possible (in line with industry average). Just 23% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Clear opportunity to address poor perceptions of fairness, value for money, and trust in keeping bills low. There is also an opportunity to more clearly demonstrate how bill increases will be invested to improve service.

Total Base Size: 828  
Affinity Water Base Size: 55



# Affinity Water: Spotlight findings

What could Affinity Water do to improve your value for money perceptions?



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*“Explain more about the rising costs and what they are spending the money on.”*

*42, Lives alone*

*“I think it could offer useful solutions to reducing bills and unnecessary water use in the home and garden throughout the year.”*

*45, Live with partner and child/ren*

*“Be more up front about how much it costs them to make each day's water supply to my house, clean and safe.”*

*66, Live with partner*

*“Clearer communication about how bills are used, visible investment in reducing leaks and environmental impact, and more reliable service would all help improve perceptions of value for money.”*

*26, Live with friends/housemates*



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# Water Voice Barometer and Spotlight Report

**Anglian Water**

January 2026

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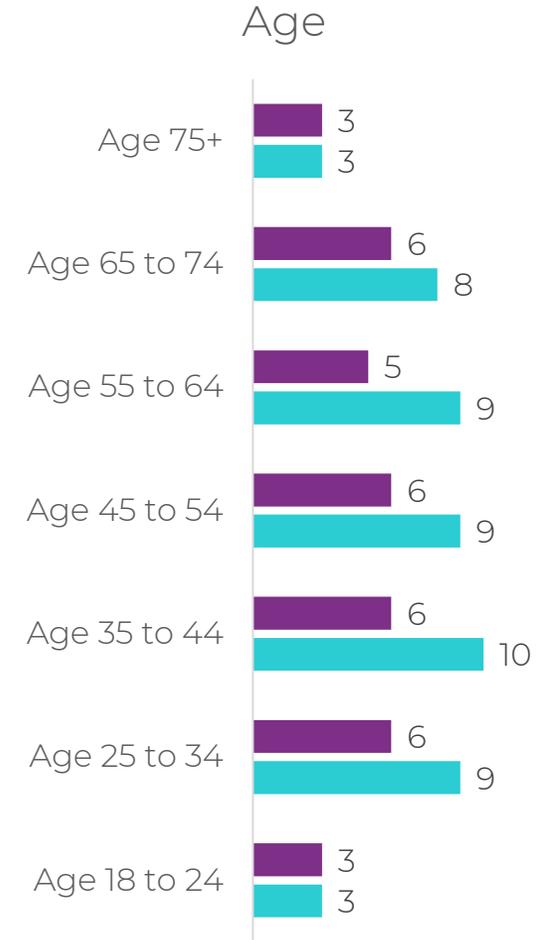
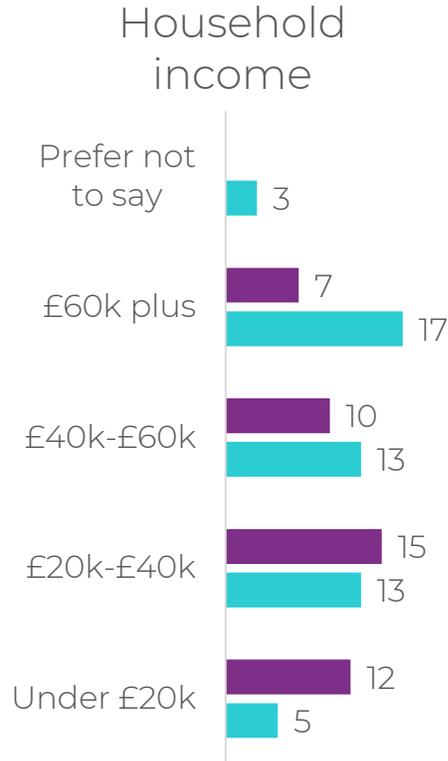
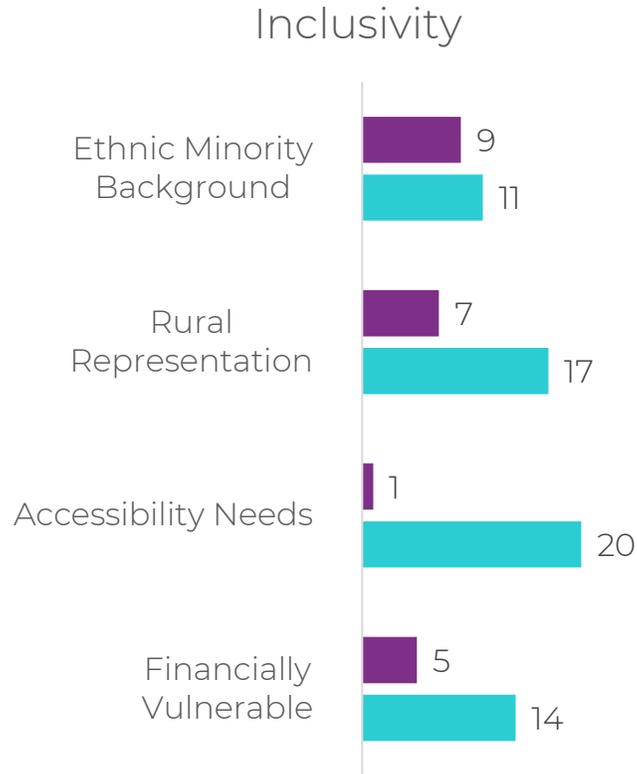
[ccw.org.uk](http://ccw.org.uk)

# Anglian Water

Community population



Anglian Water community members: 51



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met.

current sample      minimum sample

# Dashboard summary

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



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Topic	Jan 2026 AnGLIAN Water community Agreement %	+/- change % AnGLIAN Water community Month 1 (November) vs Jan	Jan 2026 Total community Agreement %	+/- difference % AnGLIAN Water vs. Total community Jan 2026
Responsiveness (Always/often responsive)	16%	-11%	26%	-11%
Recent Experience (Positive recent experience)	43%	-6%	42%	+2%
General outlook (Positive outlook)	55%	0%	47%	+8%
Communication (Fair/good communication)	24%	-1%	35%	-11%
Brand Connection (someone I'd really like and have a lot in common with)	31%	+7%	29%	+2%
Brand Momentum (salience) (on its way up/has a lot going for it)	16%	-3%	23%	-7%
Trust (a great deal/some trust)	53%	0%	48%	+5%
Past 4 Week Interaction	49%	+2%	45%	+4%
Past 4 Week Disruption	4%	0%	9%	-5%
Past 4 Week Water Quality Issues	6%	-4%	9%	-3%
Past 4 Week Sewerage issues	0%	-2%	4%	-4%
<b>Overall Value for Money</b>	39%	+7%	45%	-6%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	49%	-6%	58%	-9%
Colour and Appearance	84%	+3%	84%	+1%
Taste and Smell	75%	+5%	78%	-4%
Safety of Drinking Water	77%	+1%	79%	-3%
Reliability of Supply	88%	+3%	85%	+3%
Water Pressure	80%	+3%	79%	+1%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	49%	-2%	57%	-8%
Reducing smells from sewage treatment works	35%	+5%	39%	-4%
Maintenance of sewerage pipes and treatment works	37%	+1%	41%	-4%
Cleaning wastewater properly before release back into environment	43%	+17%	36%	+7%
Minimising sewer flooding	37%	+5%	38%	-1%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and AnGLIAN Water Base Size: 51

# Executive summary

Overview of key findings



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## Barometer

- General day-to-day service is good. Addressing neutrality around value for money remains a key opportunity.
- Generally consistent (with the industry average) scores across brand connection, momentum, and trust. Perceptions around improving rivers remain relatively poor. There is an opportunity to highlight any work being done here.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.
- There is a clear opportunity to address poor perceptions of fairness, value for money, and trust in keeping bills as low as possible. There is also an opportunity to more clearly demonstrate how bill increases will be invested.

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

**6.59/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Community members generally experience a reliable water supply with few issues, but this is offset by ongoing frustrations about rising bills, leaks, environmental impact, and limited communication or choice of supplier.



**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: 828  
Anglian Water Base Size: 51



# Anglian Water: Barometer findings



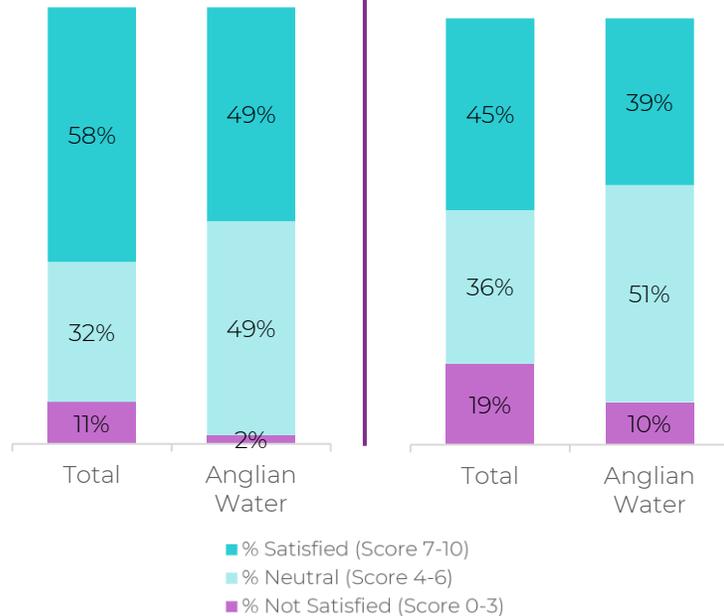
The voice for water consumers  
Llais defnyddwyr dŵr

49% are satisfied with Anglian Water overall  
2% are not satisfied

39% are satisfied with value for money  
10% are not satisfied

Overall satisfaction - water

Overall value for money satisfaction



Satisfaction is below average, whilst dissatisfaction remains very low. Value for money satisfaction remains lower than average, with high levels of neutrality.

Community members generally feel Anglian Water provide a reliable, good-quality service with few day-to-day issues. Rising bills are the main point of contention.

## Why have you given this overall satisfaction score?

*“Good but too expensive.”*

*Male, 61, Live with partner, 6/10 satisfaction score*

*“Usually consistent water supply.”*

*Male, 74, Live with partner, 8/10 satisfaction score*

*“We have a water leak on a busy road in town. The road is closed off for over a week and is still not fixed.”*

*Female, 55, Live with partner, 4/10 satisfaction score*

General day-to-day service is good. Addressing neutrality around value for money remains a key opportunity.

Total Base Size: 828  
Anglian Water Base Size: 51



# Anglian Water: Barometer findings

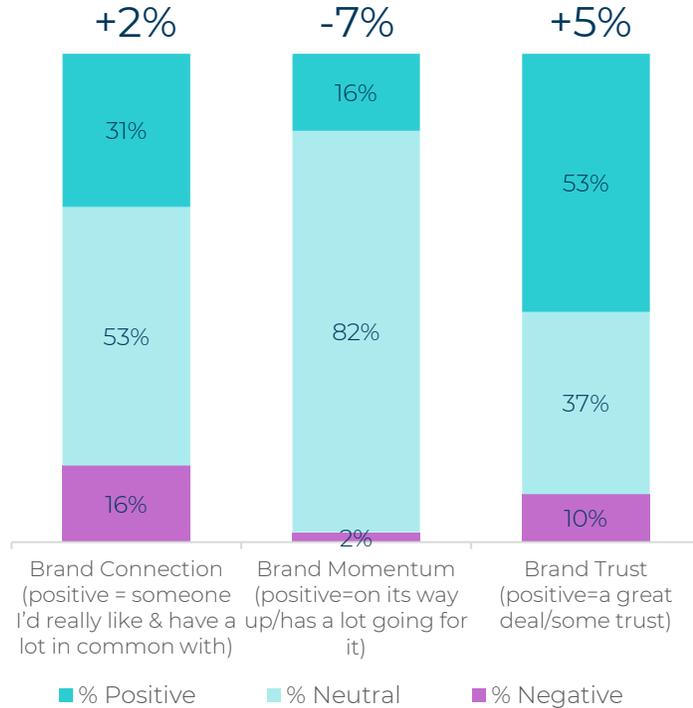
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Anglian Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	41%	-2%	-5%
Improves our rivers	16%	+4%	-10%
Creates a greener future	20%	0%	-9%
Spends community members' money wisely	14%	0%	-9%
Contributes to our communities	27%	-4%	-6%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	49%	-6%	-9%
Colour and Appearance	84%	+3%	+1%
Taste and Smell	75%	+5%	-4%
Safety of Drinking Water	77%	+1%	-3%
Reliability of Supply	88%	+3%	+3%
Water Pressure	80%	+3%	+1%
<b>Sewerage</b>			
Overall Satisfaction	49%	-2%	-8%
Reducing smells from sewage treatment works	35%	+5%	-4%
Maintenance of sewerage pipes and treatment works	37%	+1%	-4%
Cleaning wastewater properly before release back into environment	43%	+17%	+7%
Minimising sewer flooding	37%	+5%	-1%

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

Generally consistent (with the industry average) scores across brand connection, momentum, and trust. Perceptions around improving rivers remain relatively poor. There is an opportunity to highlight any work being done here.

Total Base Size: 828  
Anglian Water Base Size: 51



# Anglian Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

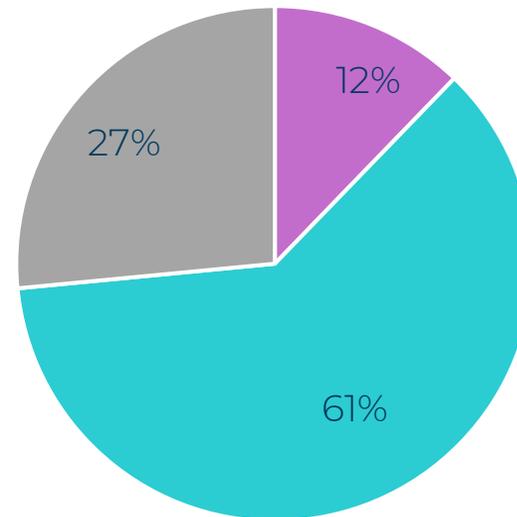
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 55%
2. Value for money and rising bills - 51%
3. Reliability of water supply and pressure – 37%

When asked to select the single most important topic, value for money and rising bills was most selected at 29%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (61%) are just looking at the charges on their bill, with 27% stating that they read the whole thing.

How charges are calculated (43%) and meter readings/estimated usage (37%) were viewed as the most unclear parts of community members bills. 1/3 had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	43%
Meter readings / estimated usage	37%
Standing charges	22%
Differences between water and wastewater charges	22%
Comparison with previous bills	10%
Help or contact information	2%
Other	2%
None – my bill is clear	33%

There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges



# Anglian Water: Spotlight findings

## Billing and value for money



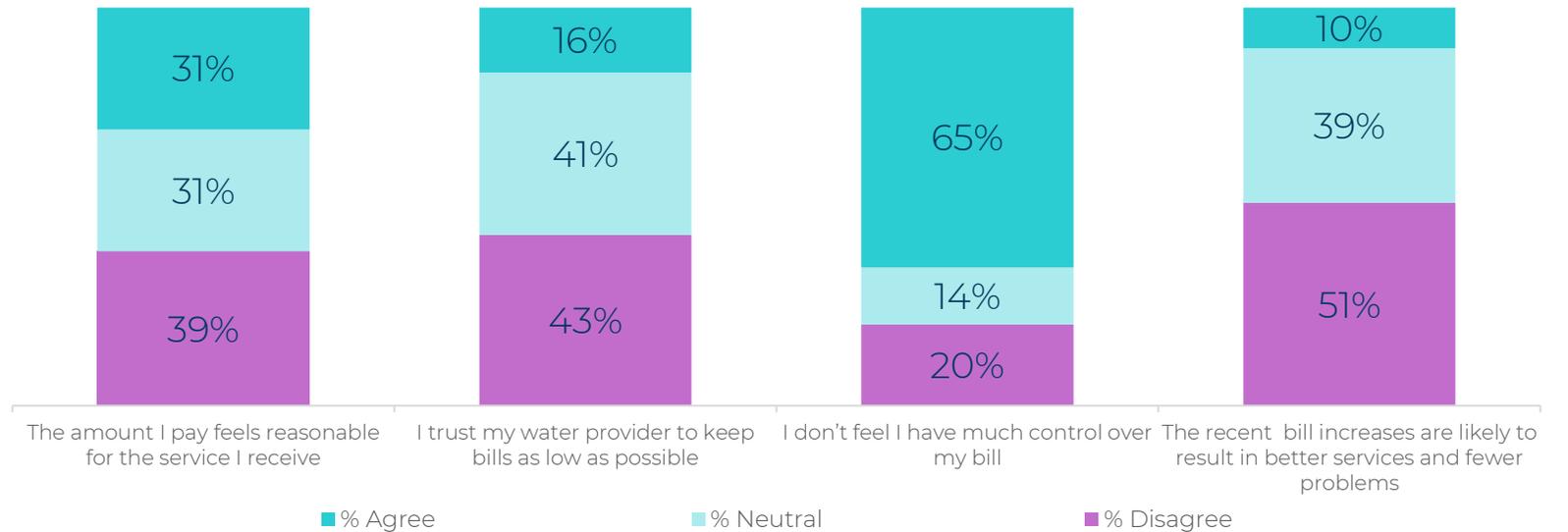
The voice for water consumers  
Llais defnyddwyr dŵr

Just over 1/3 of the community felt that the charges they pay are fair. 31% feel that the amount they pay is reasonable for the service they receive. Only 16% trust their water provider to keep bills as low as possible (both below the industry average). Just 10% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



There is a clear opportunity to address poor perceptions of fairness, value for money, and trust in keeping bills as low as possible. There is also an opportunity to more clearly demonstrate how bill increases will be invested.

Total Base Size: 828  
Anglian Water Base Size: 51



# Anglian Water: Spotlight findings

What could Anglian Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*"I think being clear on breaking down investments as a % of my bill being used for each resource, and having clarity on plans to use the money going forward."*

*44, Live with children*

*"Link tariff increases to measurable improvements in service reliability, water quality, and customer satisfaction. Provide performance reports so customers can see whether targets are being met."*

*40, Live with family*

*"Better communication about what they are doing/have improved in making our water resources safe/protected for the future environment we face with climate changes."*

*77, Live with partner*

*"Don't take money out for profits, performance pay, etc., until investment issues, such as infrastructure, pollution, etc have been addressed."*

*53, Live with partner*



ccw

The voice for water consumers  
Llais defnyddwyr dŵr

**Water Voice**

**Barometer and Spotlight Report**

**Dŵr Cymru**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# Dŵr Cymru

## Community population

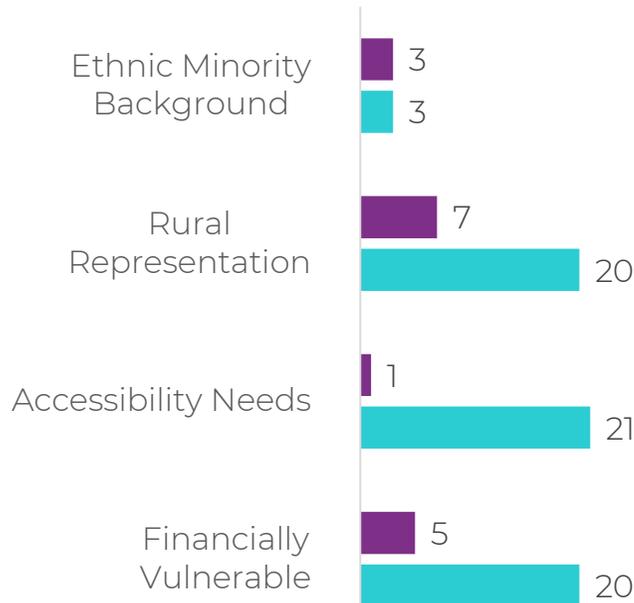


The voice for water consumers  
Llais defnyddwyr dŵr

Dŵr Cymru community members: 52

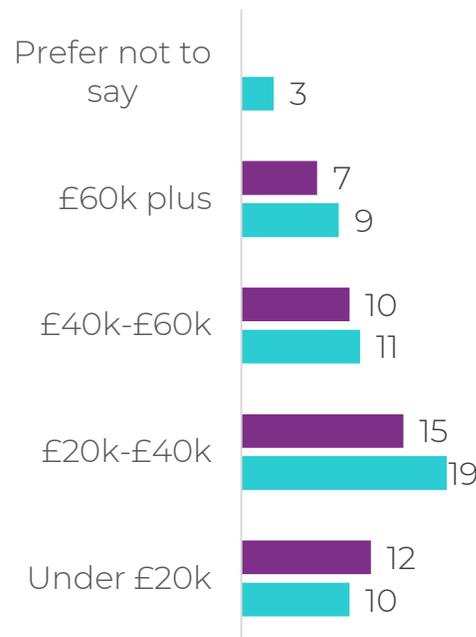
There are 11 Welsh speakers within this community with 3 members speaking Welsh as their first language. No one has requested the survey in Welsh.

### Inclusivity

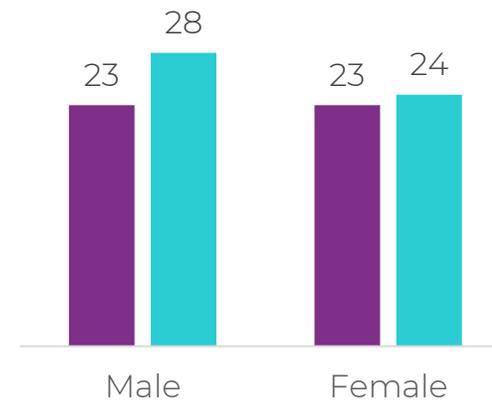


Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

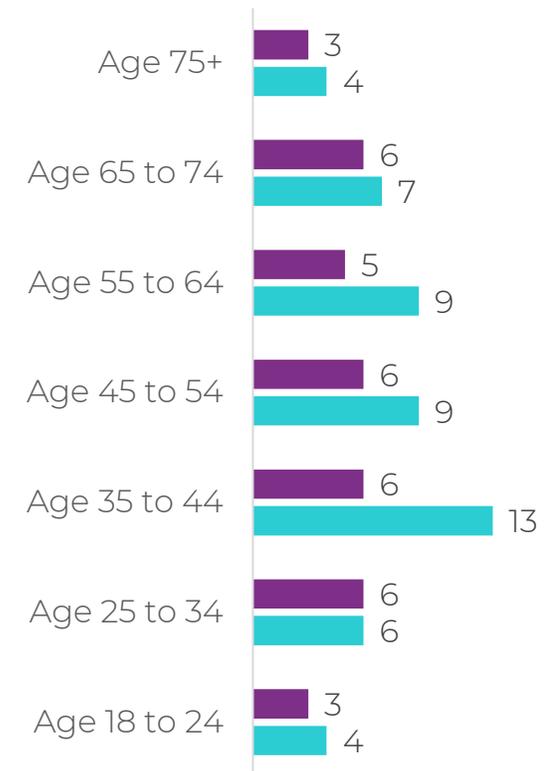
### Household income



### Gender



### Age



Legend: ■ 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. N.B. Our lowest household income target is lower than the minimum sample, however when combined with community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met.

# Dashboard summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Jan 2026 Dŵr Cymru community Agreement %	+/- difference % Dŵr Cymru community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Dŵr Cymru community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	23%	-9%	26%	-3%
Recent Experience (Positive recent experience)	44%	+10%	42%	+3%
General outlook (Positive outlook)	46%	+0%	47%	-1%
Communication (Fair/good communication)	25%	-3%	35%	-10%
Brand Connection (someone I'd really like and have a lot in common with)	17%	-9%	29%	-12%
Brand Momentum (salience) (on its way up/has a lot going for it)	14%	-6%	23%	-9%
Trust (a great deal/some trust)	44%	+7%	48%	-4%
Past 4 Week Interaction	35%	-7%	45%	-10%
Past 4 Week Disruption	12%	+1%	9%	+3%
Past 4 Week Water Quality Issues	10%	+1%	9%	+1%
Past 4 Week Sewerage issues	2%	+2%	4%	-2%
<b>Overall Value for Money</b>	48%	+13%	45%	+3%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	58%	+12%	58%	0%
Colour and Appearance	83%	0%	84%	-1%
Taste and Smell	77%	-1%	78%	-1%
Safety of Drinking Water	75%	+1%	79%	-4%
Reliability of Supply	87%	+4%	85%	+2%
Water Pressure	87%	+10%	79%	+8%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	56%	+8%	57%	-1%
Reducing smells from sewage treatment works	42%	+5%	39%	+3%
Maintenance of sewerage pipes and treatment works	42%	+3%	41%	+1%
Cleaning wastewater properly before release back into environment	37%	+11%	36%	+1%
Minimising sewer flooding	37%	+15%	38%	-1%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Dŵr Cymru Base Size: 52

# Executive summary

Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- Opportunities to improve value for money satisfaction and demonstrate how increases in bills will be invested in improving service.
- Opportunities to improve perceptions of trust and brand momentum among community members.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.
- Clear opportunity to address perceptions of fairness, value for money, and trust in keeping bills as low as possible; as well as to help community members to feel more in control of their bill.

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

**6.69/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is neutral to mildly positive, with reliable water supply and good service when needed, but there are ongoing concerns about high prices, environmental impact, slow leak fixes, and limited communication.



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

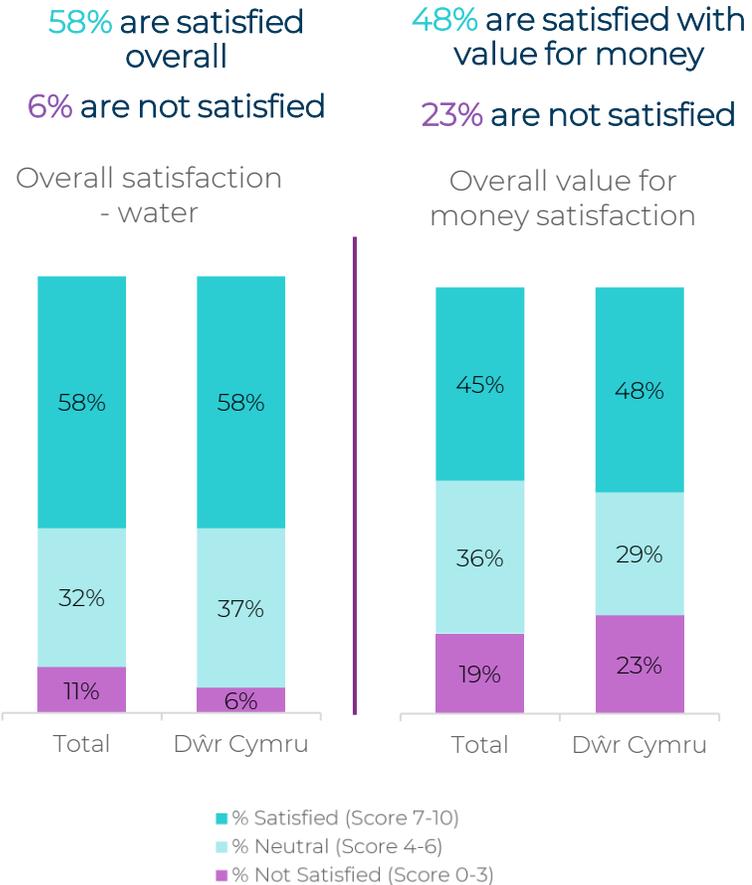
Total Base Size: 828  
Dŵr Cymru Base Size: 52



# Dŵr Cymru: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr



Both overall satisfaction and value for money satisfaction are in line with the industry average. There is minimal dissatisfaction overall (6%), but ¼ are dissatisfied with value for money. This dissatisfaction is reflected in some of the open-ended feedback.

## Why have you given this overall satisfaction score?

*"I pay for clean water so expect to receive clean water."*

*Male, 68, Live alone, 5/10 satisfaction score*

*"I like how quick Welsh Water respond to problems and great customer service."*

*Female, 39 Live with child/ren, 10/10 satisfaction score*

*"Water prices are way overpriced."*

*Male, 68, Live alone, 5/10 satisfaction score*

Opportunities to improve value for money satisfaction and demonstrate how increases in bills will be invested in improving service.

Total Base Size: 828  
Dŵr Cymru Base Size: 52



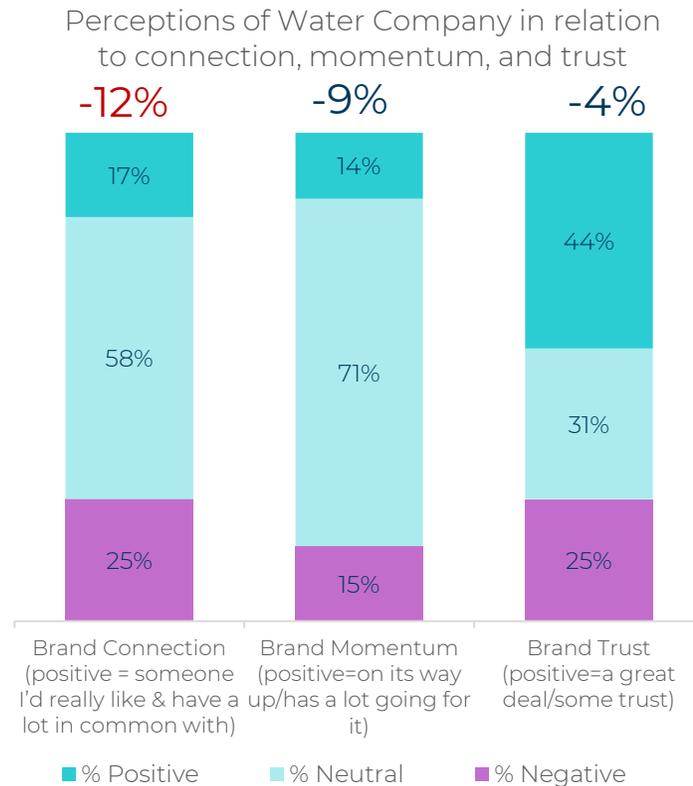
# Dŵr Cymru: Barometer findings

Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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



% Who agree that Dŵr Cymru...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	39%	+4%	-7%
Improves our rivers	15%	+2%	-11%
Creates a greener future	25%	+3%	-4%
Spends community members' money wisely	17%	-3%	-8%
Contributes to our communities	27%	+7%	-6%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	58%	+12%	0%
Colour and Appearance	83%	0%	-1%
Taste and Smell	77%	-1%	-1%
Safety of Drinking Water	75%	+1%	-4%
Reliability of Supply	87%	+4%	+2%
Water Pressure	87%	+10%	+8%
<b>Sewerage</b>			
Overall Satisfaction	56%	+8%	-1%
Reducing smells from sewage treatment works	42%	+5%	+3%
Maintenance of sewerage pipes and treatment works	42%	+3%	+1%
Cleaning wastewater properly before release back into environment	37%	+11%	+1%
Minimising sewer flooding	37%	+15%	-1%

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

Opportunities to improve perceptions of trust and brand momentum among community members.

Total Base Size: 828  
Dŵr Cymru Base Size: 52



# Dŵr Cymru: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

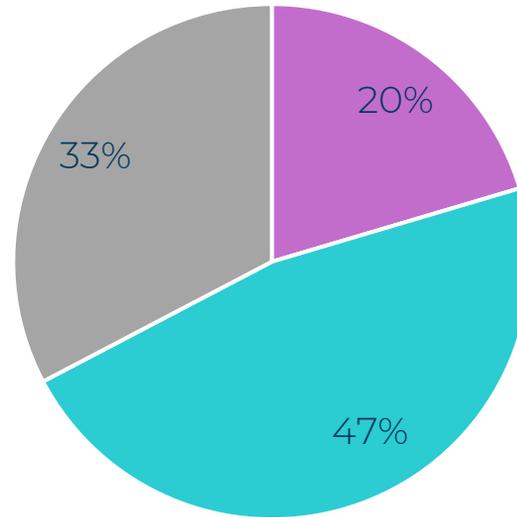
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

### Select the 3 most important themes

1. Value for money and rising bills - 56%
2. Reducing pollution and protecting rivers, seas, and the environment - 54%
3. Quality of drinking water - 42%

When asked to select the single most important topic, value for money and rising bills was most selected at 35%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (47%) are just looking at the charges on their bill, with 1/3 stating that they read the whole thing.

How charges are calculated (37%) and standing charges (27%) were viewed as the most unclear parts of community members bills. 41% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	37%
Standing charges	27%
Meter readings / estimated usage	14%
Differences between water and wastewater charges	14%
Comparison with previous bills	10%
Help or contact information	2%
Other	4%
None – my bill is clear	41%

There is an opportunity to address billing clarity, particularly around how charges are calculated and standing charges.



# Dŵr Cymru: Spotlight findings

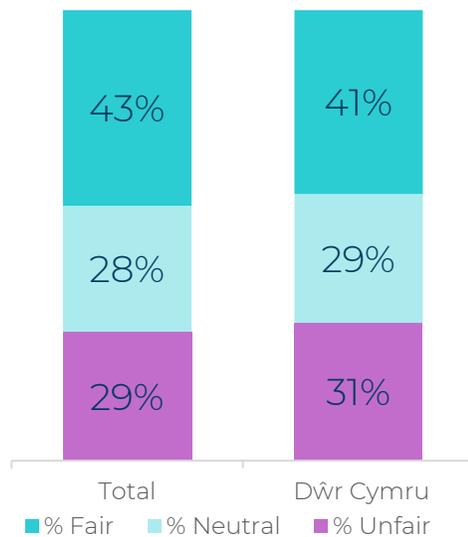
## Billing and value for money



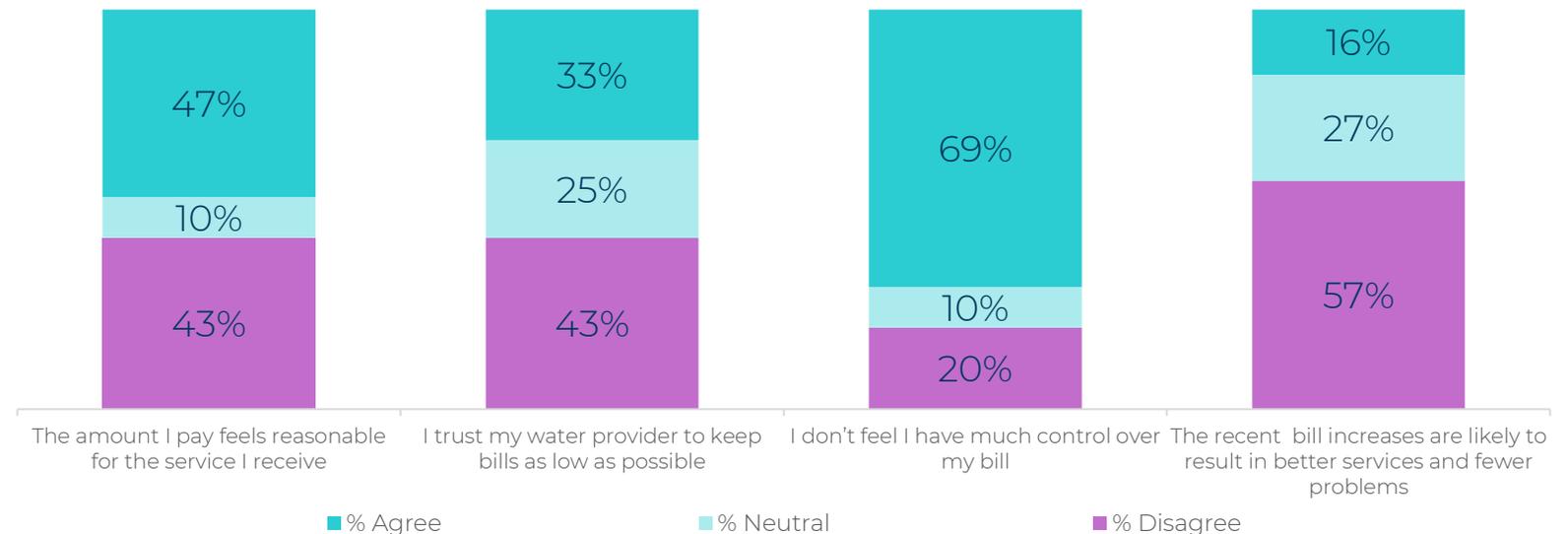
The voice for water consumers  
Llais defnyddwyr dŵr

41% of the community felt that the charges they pay are fair. Just under half feel that the amount they pay feels reasonable for the service, but just 1/3 trust their water provider to keep bills as low as possible. Just 16% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Clear opportunity to address perceptions of fairness, value for money, and trust in keeping bills as low as possible; as well as to help community members to feel more in control of their bill.

Total Base Size: 828  
Dŵr Cymru Base Size: 52



# Dŵr Cymru: Spotlight findings

What could Dŵr Cymru do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Make provisions for single occupancy households.”*

*60, Live alone*

*“By protecting and investing in our rivers and environment, I think the amount we pay for our water services could level out and controlled in the long term.”*

*64, Live with partner*

*“I think clearer communication about where our money goes would help a lot. For example, showing exactly how much is spent on maintenance, environmental projects, and improving supply reliability. Also, keeping bills as stable as possible and offering more ways for customers to save if they use less water would make me feel like I’m getting better value.”*

*23, Live friends/housemates*

*“Provide a more detailed breakdown of what the charges are for, rather than just a metered charge. I.e. Leaks, wastewater treatment, fresh water supply etc.”*

*66, Live with partner*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**Hafren Dyfrdwy**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# Hafren Dyfrdwy

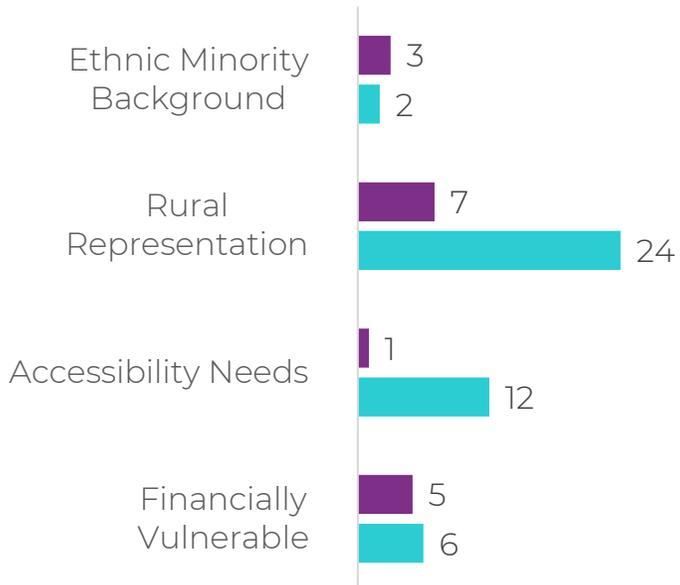
Community population



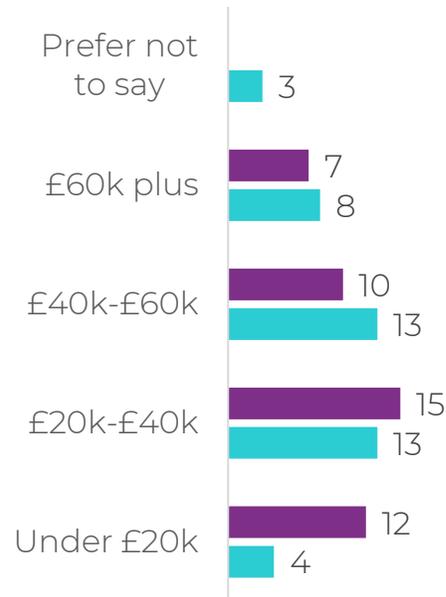
Hafren Dyfrdwy community members: 41

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

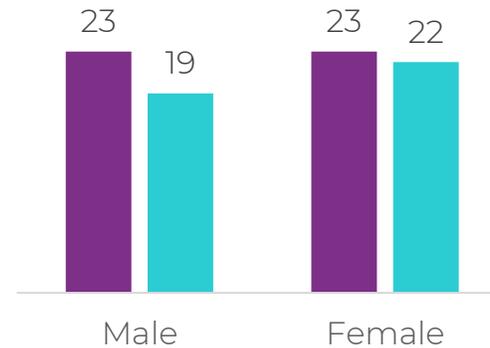
### Inclusivity



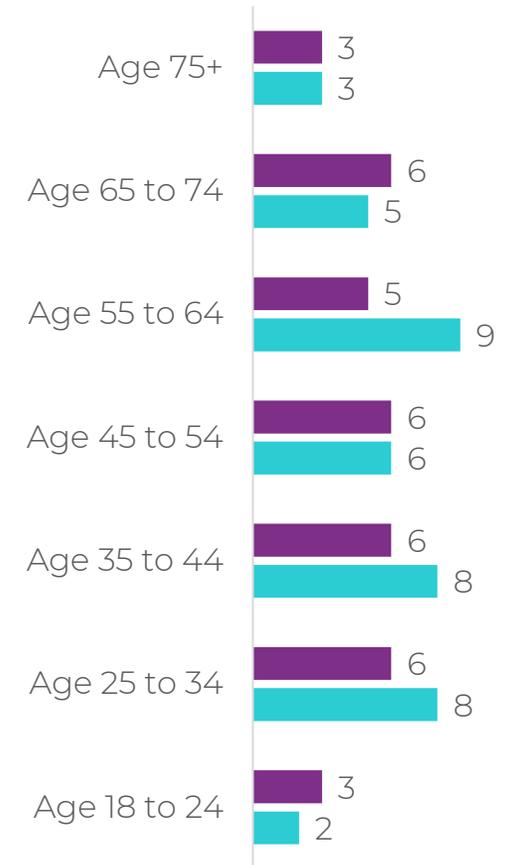
### Household income



### Gender



### Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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 and ethnic minority sample by at least 1 for next month.

Legend: ■ current sample ■ minimum sample

# Dashboard summary

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



Topic	Jan 2026 Hafren Dyfrdwy community Agreement %	+/- difference % Hafren Dyfrdwy community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Hafren Dyfrdwy community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	24%	+1%	26%	-2%
Recent Experience (Positive recent experience)	51%	+3%	42%	+9%
General outlook (Positive outlook)	56%	+5%	47%	+9%
Communication (Fair/good communication)	29%	-4%	35%	-5%
Brand Connection (someone I'd really like and have a lot in common with)	42%	+17%	29%	+12%
Brand Momentum (salience) (on its way up/has a lot going for it)	34%	+7%	23%	+12%
Trust (a great deal/some trust)	63%	-5%	48%	+15%
Past 4 Week Interaction	24%	-2%	45%	-20%
Past 4 Week Disruption	7%	+5%	9%	-1%
Past 4 Week Water Quality Issues	7%	+7%	9%	-2%
Past 4 Week Sewerage issues	0%	-2%	4%	-4%
<b>Overall Value for Money</b>	61%	+10%	45%	+16%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	73%	+15%	58%	+16%
Colour and Appearance	93%	-1%	84%	+9%
Taste and Smell	88%	-3%	78%	+10%
Safety of Drinking Water	88%	+1%	79%	+9%
Reliability of Supply	95%	+4%	85%	+10%
Water Pressure	85%	+3%	79%	+6%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	64%	+8%	57%	+7%
Reducing smells from sewage treatment works	51%	+18%	39%	+12%
Maintenance of sewerage pipes and treatment works	49%	+18%	41%	+8%
Cleaning wastewater properly before release back into environment	49%	+5%	36%	+13%
Minimising sewer flooding	56%	+9%	38%	+18%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Hafren Dyfrdwy Base Size: 41

# Executive summary

Overview of key findings



## Barometer

- There is an opportunity to improve general transparency about what the company does to supply water in the area and where money is invested.
- Some very positive scores when it comes to trust, momentum and connection, and positive metrics across both water and sewerage. Continue to build on positive sentiment.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.
- Whilst fairness scores are in line with the industry average there is an opportunity to improve perceptions around trust/confidence in keeping bills low and transparency in how bill increases are invested to improve service.

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

**7.51/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Reliable, good-quality water service with few issues and responsive customer service when needed, but this is offset by concerns about high bills, poor transparency, and limited communication about what the company does or how money is used.



**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: 828  
Hafren Dyfrdwy Base Size: 41



# Hafren Dyfrdwy: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr



Satisfaction remains above average and dissatisfaction is very low. Value for money satisfaction is also higher than the industry average.

Community members highlight no issues with service levels, but some do suggest there is limited transparency when it comes to what the company actually does.

## Why have you given this overall satisfaction score?

*"No problems with water but I don't know what my money is used for."*

*Female, 39, Live with children, 8/10 satisfaction score*

*"No communication, I have no idea what they do."*

*Female, 28, Live with partner, 4/10 satisfaction score*

*"My supply has always been constant with no dips in quality."*

*Female, 57, Live with partner, 9/10 satisfaction score*

There is an opportunity to improve general transparency about what the company does to supply water in the area and where money is invested.

Total Base Size: 828  
Hafren Dyfrdwy Base Size: 41



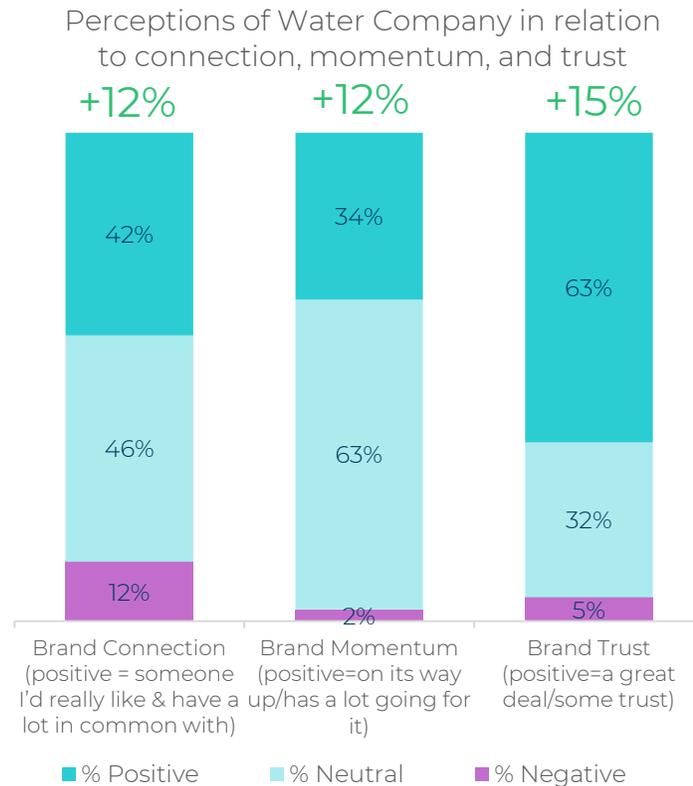
# Hafren Dyfrdwy: Barometer findings

Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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



% Who agree that Hafren Dyfrdwy...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	68%	+8%	+22%
Improves our rivers	37%	+17%	+11%
Creates a greener future	34%	+16%	+5%
Spends community members' money wisely	27%	+5%	+2%
Contributes to our communities	32%	+5%	-1%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	73%	+15%	+16%
Colour and Appearance	93%	-1%	+9%
Taste and Smell	88%	-3%	+10%
Safety of Drinking Water	88%	+1%	+9%
Reliability of Supply	95%	+4%	+10%
Water Pressure	85%	+3%	+6%
<b>Sewerage</b>			
Overall Satisfaction	64%	+8%	+7%
Reducing smells from sewage treatment works	51%	+18%	+12%
Maintenance of sewerage pipes and treatment works	49%	+18%	+8%
Cleaning wastewater properly before release back into environment	49%	+5%	+13%
Minimising sewer flooding	56%	+9%	+18%

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

Some very positive scores when it comes to trust, momentum and connection, and positive metrics across both water and sewerage. Continue to build on positive sentiment.

Total Base Size: 828  
Hafren Dyfrdwy Base Size: 41



# Hafren Dyfrdwy: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

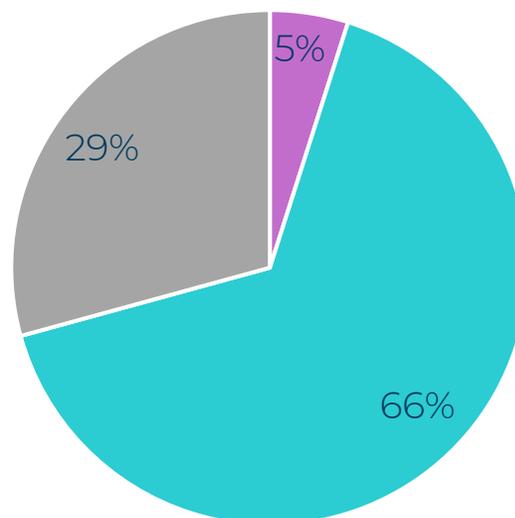
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Value for money and rising bills - 59%
2. Quality of drinking water - 54%
3. Reducing pollution and protecting rivers, seas, and the environment - 46%

When asked to select the single most important topic, value for money and rising bills was most selected at 32%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (66%) are just looking at the charges on their bill, with 1/3 stating that they read the whole thing.

How charges are calculated (37%) and both differences between water and wastewater charges (34%) and meter readings/estimated usage (34%) were viewed as the most unclear parts of community members bills. 29% had no issues with the clarity of their bill.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	37%
Differences between water and wastewater charges	34%
Meter readings / estimated usage	34%
Standing charges	20%
Comparison with previous bills	17%
Help or contact information	5%
Other	5%
None – my bill is clear	29%

There is an opportunity to address billing clarity, particularly around how charges are calculated, differences between water and wastewater charges and meter readings/estimated usage.



# Hafren Dyfrdwy: Spotlight findings

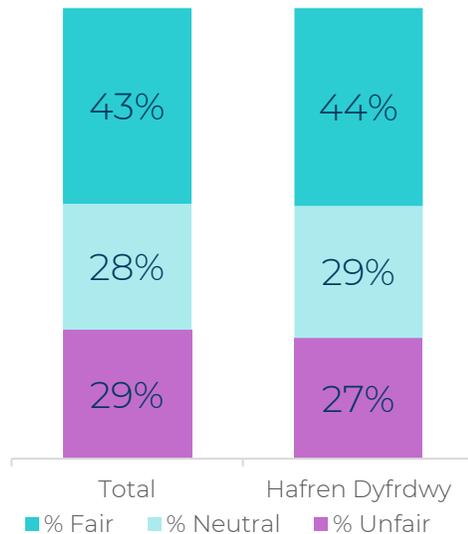
Billing and value for money



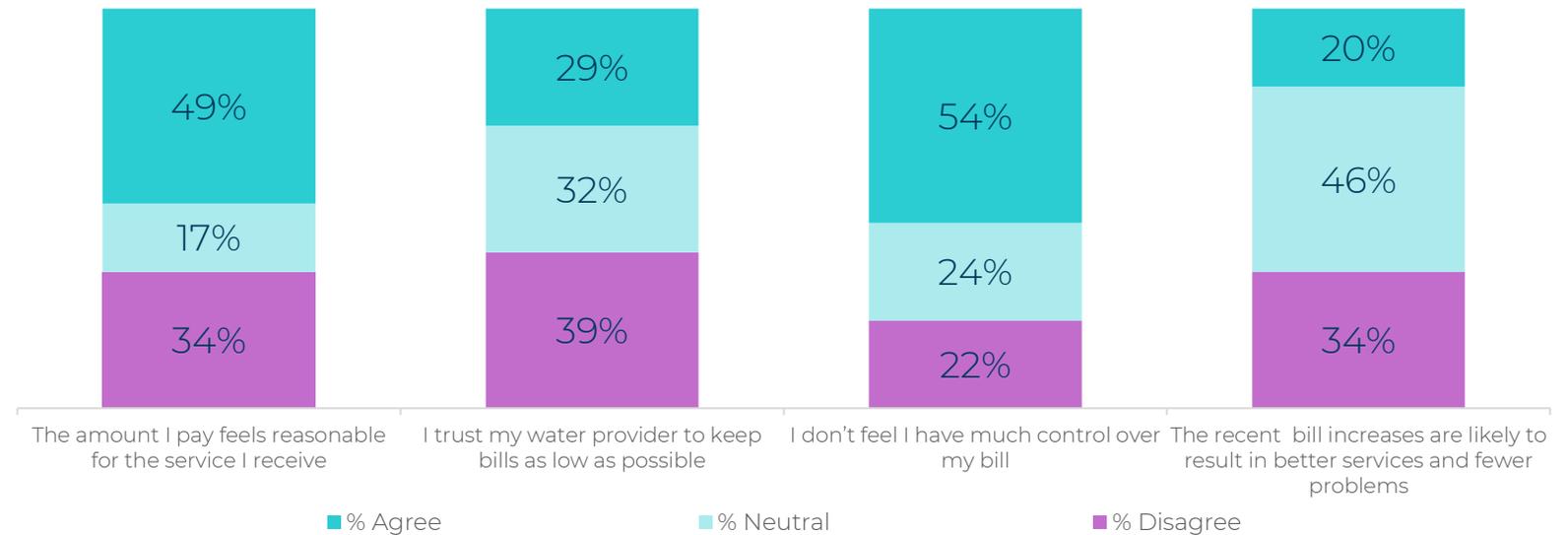
The voice for water consumers  
Llais defnyddwyr dŵr

Just over 1/3 of the community felt that the charges they pay are fair. 49% feel that the amount they pay feels reasonable for the service and 29% trust their water provider to keep bills as low as possible (both below industry average). 20% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Whilst fairness scores are in line with the industry average, there is an opportunity to improve perceptions around trust/confidence in keeping bills low and transparency in how bill increases are invested to improve service.

Total Base Size: 828  
Hafren Dyfrdwy Base Size: 41



# Hafren Dyfrdwy: Spotlight findings

What could Hafren Dyfrdwy do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Have less complex bills and a clearer report showing what all money received is spent on.”*

*57, Live with family*

*“Perhaps explain why the costs of collecting wastewater and returning it for treatment is a large percentage of my water bill.”*

*71, Live with partner*

*“Include information with our bills that the average person can understand, don't use jargon.”*

*39, Live with child/ren*

*“Clear communication on how money is spent. Or when we are in credit not for it be hard to get our money back.”*

*28, Live with partner*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice

# Barometer and Spotlight Report

**Northumbrian Water and Essex & Suffolk Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# Northumbrian Water and Essex & Suffolk Water

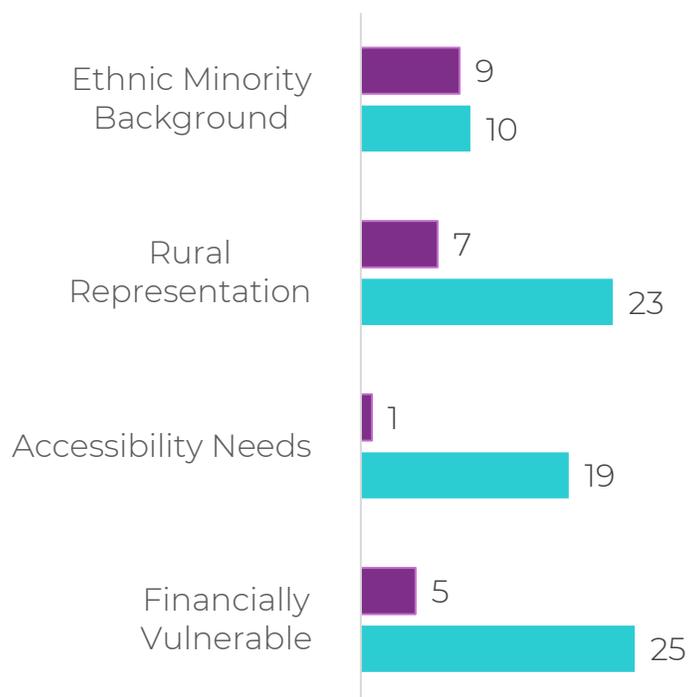
Community population



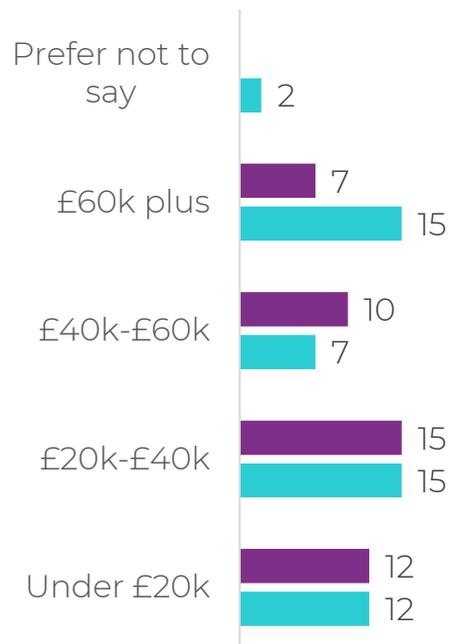
The voice for water consumers  
Llais defnyddwyr dŵr

Northumbrian Water community members : 31  
Essex and Suffolk Water community members: 24

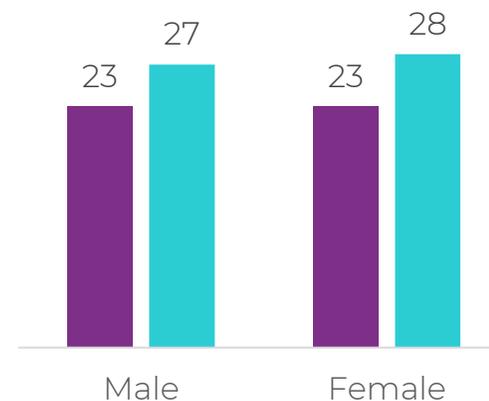
## Inclusivity



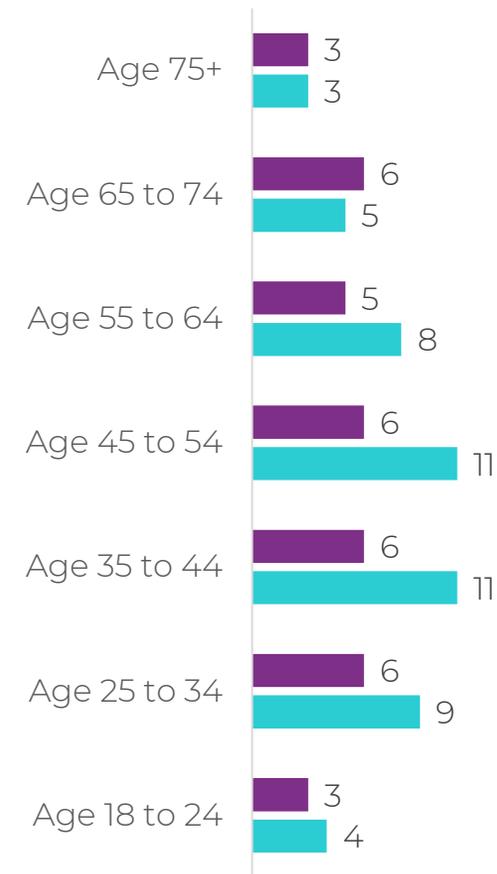
## Household income



## Gender



## Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

Sample note: We have met over 95% of our sample target quotas.

current sample    minimum sample

# Dashboard summary

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

**ESSEX & SUFFOLK**  
**WATER** living water

**NORTHUMBRIAN**  
**WATER** living water

**CCW**

The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Jan 2026 Northumbrian Water and Essex & Suffolk Water community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Northumbrian Water and Essex & Suffolk Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	26%	-3%	26%	-1%
Recent Experience (Positive recent experience)	45%	-6%	42%	+4%
General outlook (Positive outlook)	58%	+3%	47%	+11%
Communication (Fair/good communication)	38%	+4%	35%	+3%
Brand Connection (someone I'd really like and have a lot in common with)	33%	+5%	29%	+4%
Brand Momentum (salience) (on its way up/has a lot going for it)	20%	-6%	23%	-3%
Trust (a great deal/some trust)	51%	-9%	48%	+3%
Past 4 Week Interaction	36%	+2%	45%	-8%
Past 4 Week Disruption	9%	-1%	9%	0%
Past 4 Week Water Quality Issues	13%	+5%	9%	+4%
<b>Overall Value for Money</b>	46%	-1%	45%	0%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	66%	+2%	58%	+8%
Colour and Appearance	76%	-4%	84%	-7%
Taste and Smell	84%	+4%	78%	+5%
Safety of Drinking Water	82%	+2%	79%	+3%
Reliability of Supply	84%	-8%	85%	-1%
Water Pressure	82%	+2%	79%	+3%
<b>Northumbrian Water Only</b>				
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	68%	+7%	57%	+11%
Reducing smells from sewage treatment works	48%	+13%	39%	+9%
Maintenance of sewerage pipes and treatment works	58%	+12%	41%	+17%
Cleaning wastewater properly before release back into environment	39%	-4%	36%	+3%
Minimising sewer flooding	39%	+10%	38%	+1%
Past 4 Week Sewerage issues	0%	-4%	4%	-4%

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.  
 Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Northumbrian  
 and Essex & Suffolk Water Base Size: 55

# Executive summary

Overview of key findings

ESSEX & SUFFOLK  
WATER *living water*

NORTHUMBRIAN  
WATER *living water*

CCW

The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- Lots of positive experiences to build on and an opportunity to convert neutral community members into a more positive position when it comes to value for money.
- Metrics are generally positive and improving on wave 1 when it comes to brand perceptions and water metrics. Continue to build on positive experiences.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.
- There is an opportunity to improve transparency around how increased bills will be used to improve overall service, as well as to help community members manage the water they use to improve control of their bill.

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

**6.93/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is neutral to mildly positive with reliable supply, but ongoing concerns about cost, environmental impact, and limited communication.



**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: 828  
Northumbrian and Essex &  
Suffolk Water Base Size: 55



# Northumbrian Water and Essex & Suffolk Water : Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr

66% are satisfied overall

6% are not satisfied

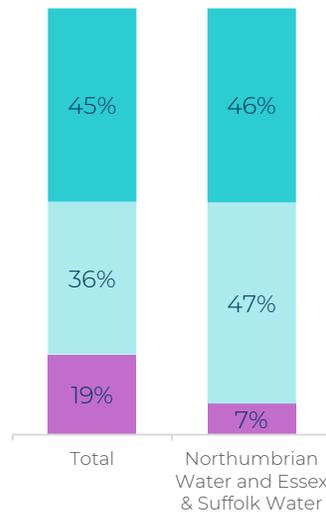
Overall satisfaction - water



46% are satisfied with value for money

7% are not satisfied

Overall value for money satisfaction



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

Satisfaction remains higher than the industry average. Value for money is in line with the average, although dissatisfaction is lower here. There are also high levels of neutrality when it comes to value for money.

## Why have you given this overall satisfaction score?

*“Water and sewage management is fundamental to our lives and we have no choice of provider really. We need our water companies to put clean water and the environment first.”*

*Female, 59, Live with partner, 5/10 satisfaction score, Essex and Suffolk Water*

*“Too expensive and pollute our water systems.”*

*Male, 45, Live with family, 1/10 satisfaction score, Northumbrian Water*

*“Great in keeping customers informed.”*

*Female, 78, Live alone, 10/10 satisfaction score, Northumbrian Water*

Lots of positive experiences to build on and an opportunity to convert neutral community members into a more positive position when it comes to value for money.

Total Base Size: 828  
Northumbrian and Essex & Suffolk Water Base Size: 55



# Northumbrian Water and Essex & Suffolk Water : Barometer findings

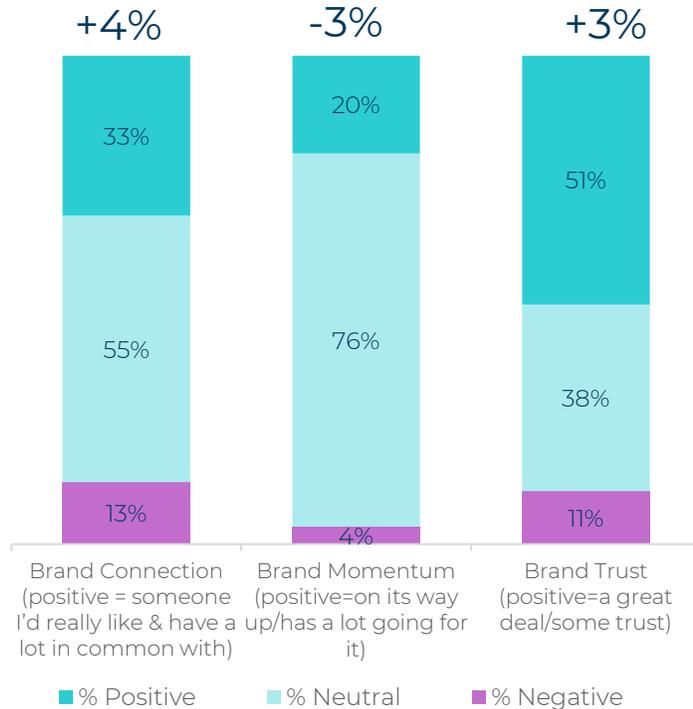
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Northumbrian Water and Essex & Suffolk Water ...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	62%	+12%	+16%
Improves our rivers	35%	+5%	+9%
Creates a greener future	33%	+1%	+4%
Spends community members' money wisely	31%	+11%	+6%
Contributes to our communities	36%	0%	+3%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	66%	+2%	+8%
Colour and Appearance	76%	-4%	-7%
Taste and Smell	84%	+4%	+5%
Safety of Drinking Water	82%	+2%	+3%
Reliability of Supply	84%	-8%	-1%
Water Pressure	82%	+2%	+3%
<b>Sewerage (Northumbrian Water Only)</b>			
Overall Satisfaction	68%	+7%	+11%
Reducing smells from sewage treatment works	48%	+13%	+9%
Maintenance of sewerage pipes and treatment works	58%	+12%	+17%
Cleaning wastewater properly before release back into environment	39%	-4%	+3%
Minimising sewer flooding	39%	+10%	+1%

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

Sentiment generally positive and improving on wave 1 when it comes to brand perceptions and water specific KPI's. Continue to build on positive experiences.

Total Base Size: 828  
Northumbrian and Essex & Suffolk Water Base Size: 55



# Northumbrian Water and Essex & Suffolk Water : Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

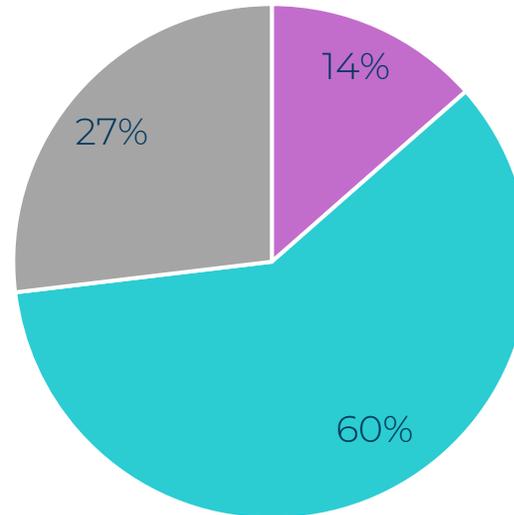
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 48%
2. Value for money and rising bills - 48%
3. Quality of drinking water - 40%

When asked to select the single most important topic, value for money and rising bills was most selected at 29%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (60%) are just looking at the charges on their bill, with 27% stating that they read the whole thing.

How charges are calculated (37%) and meter readings/estimated usage (31%) were viewed as the most unclear parts of community members bills. 1/3 had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	37%
Meter readings / estimated usage	31%
Differences between water and wastewater charges	21%
Standing charges	17%
Comparison with previous bills	10%
Help or contact information	6%
Other	
None – my bill is clear	40%

There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.

Total Base Size: 828  
Northumbrian and Essex & Suffolk Water Base Size: 55



# Northumbrian Water and Essex & Suffolk Water : Spotlight findings

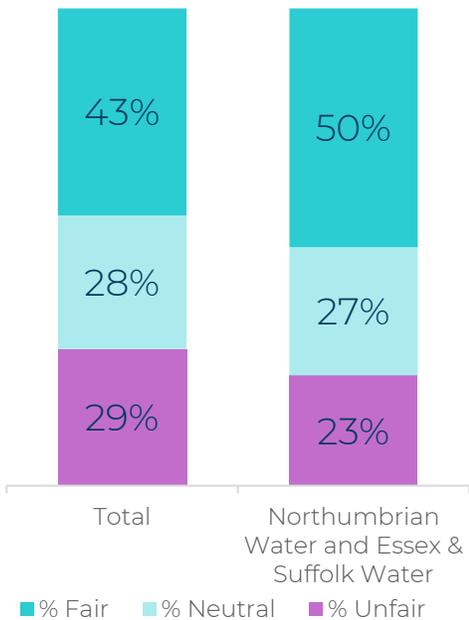
Billing and value for money



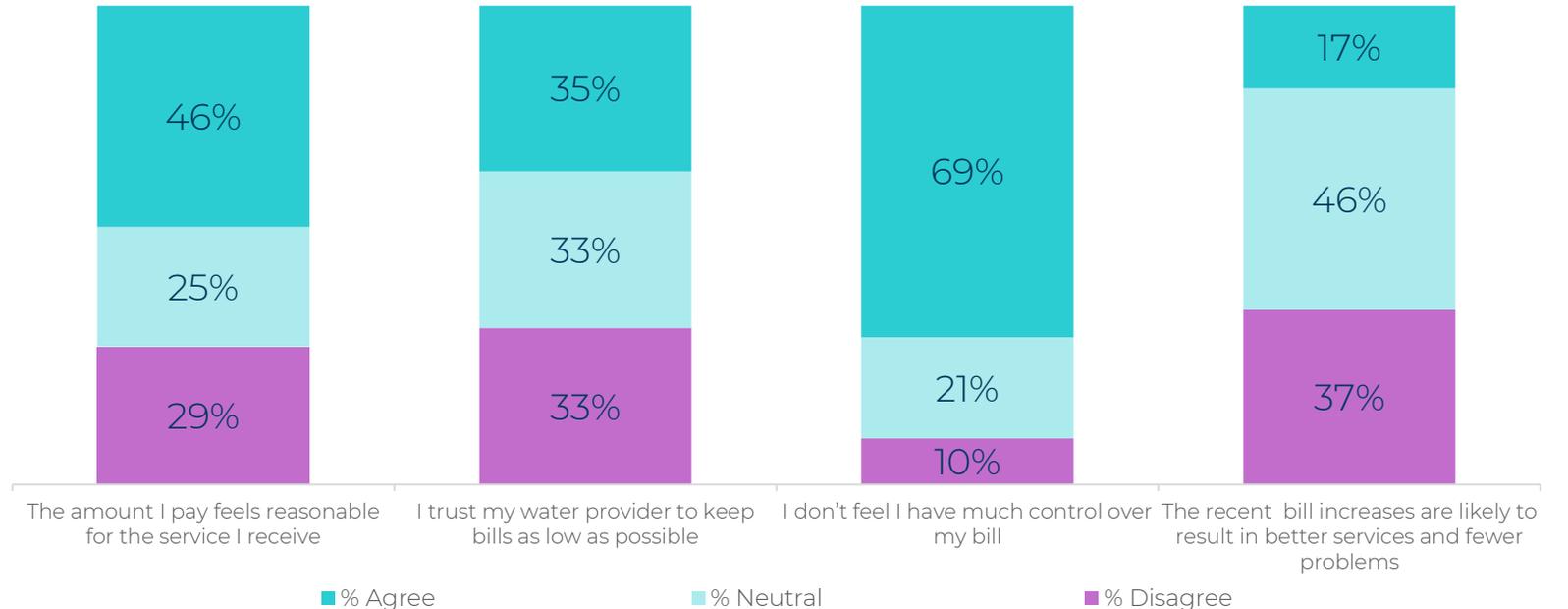
The voice for water consumers  
Llais defnyddwyr dŵr

50% of the community felt that the charges they pay are fair. 46% felt that the amount they pay feels reasonable for the service they receive and 35% trust their water provider to keep bills as low as possible. Just 17% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



There is an opportunity to improve transparency around how increased bills will be used to improve overall service, as well as to help community members manage the water they use to improve control of their bill.

Total Base Size: 828  
Northumbrian and Essex & Suffolk Water Base Size: 55



# Northumbrian Water and Essex & Suffolk Water :

## Spotlight findings

What could Northumbrian Water and Essex & Suffolk Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Provide a bit more of a breakdown of what is spent on what - e.g. a pie chart...with what percentage of income goes where.”*

*24, Live with partner,  
Essex and Suffolk Water*

*“More information on the good works being undertaken and how they benefit specific geographical areas”*

*59, Live with partner,  
Essex and Suffolk Water*

*“Cut leakage and fix it quicker. You pay for treated water. Losing it through leaks wastes your money. Set clear repair times and meet them.”*

*30, Live with child/ren,  
Northumbrian Water*

*“Increased investment in the water distribution and treatment system. Discounted prices for customers of things like water butts.”*

*60, Live alone,  
Northumbrian Water*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**Portsmouth Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

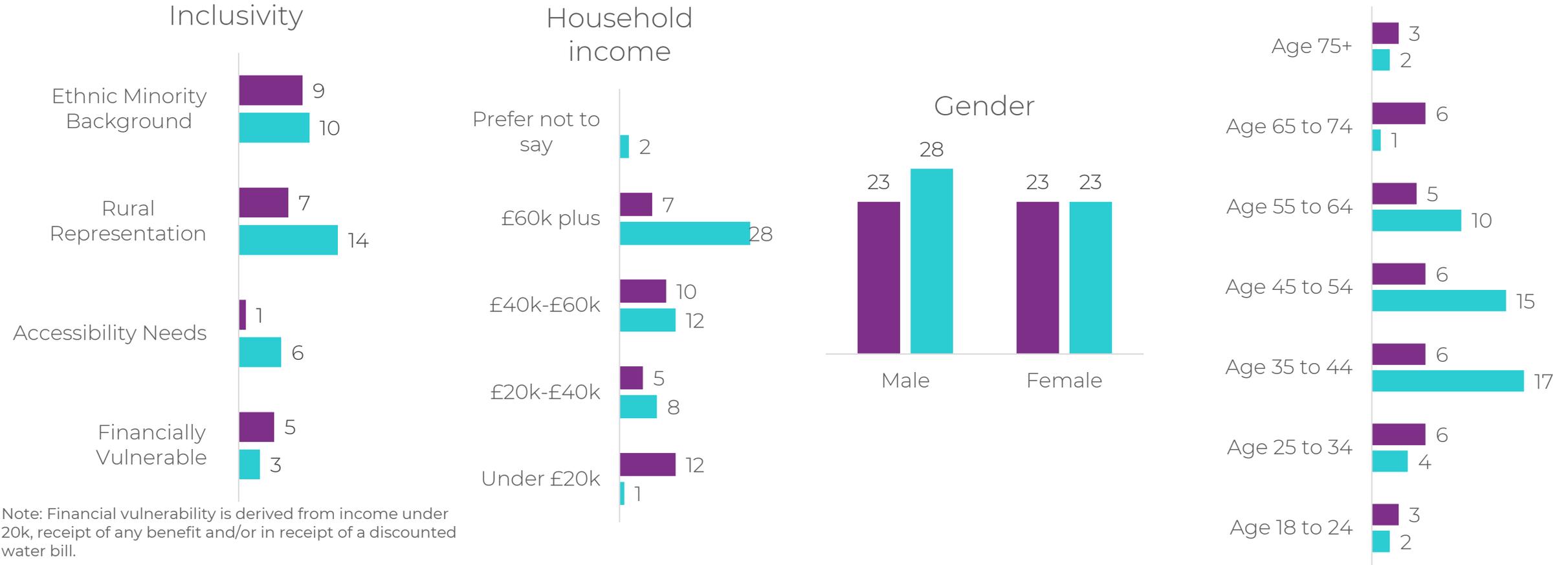
# Portsmouth Water

## Community population



The voice for water consumers  
Llais defnyddwyr dŵr

Portsmouth Water community members: 51



**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 community members by including those who are on benefits, struggling to pay their bills or on a discounted water tariff. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our ethnic minority background and 18-24 and 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	Jan 2026 Portsmouth Water community Agreement %	+/- difference % Portsmouth Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Portsmouth Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	59%	+11%	26%	+32%
Recent Experience (Positive recent experience)	73%	+14%	42%	+31%
General outlook (Positive outlook)	80%	+14%	47%	+33%
Communication (Fair/good communication)	69%	+17%	35%	+34%
Brand Connection (someone I'd really like and have a lot in common with)	65%	+10%	29%	+36%
Brand Momentum (salience) (on its way up/has a lot going for it)	57%	+14%	23%	+34%
Trust (a great deal/some trust)	77%	+6%	48%	+28%
Past 4 Week Interaction	43%	0%	45%	-1%
Past 4 Week Disruption	10%	+8%	9%	+1%
Past 4 Week Water Quality Issues	10%	+4%	9%	+1%
<b>Overall Value for Money</b>	84%	+6%	45%	+39%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	88%	+10%	58%	+31%
Colour and Appearance	96%	+2%	84%	+13%
Taste and Smell	88%	+2%	78%	+10%
Safety of Drinking Water	94%	+4%	79%	+15%
Reliability of Supply	96%	-2%	85%	+11%
Water Pressure	96%	+2%	79%	+17%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Portsmouth Water Base Size: 51

# Executive summary

Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- Continue to build on positive community member experiences.
- In line with overall satisfaction, scores are positive across almost all KPIs, compared with the initial November wave, and the industry average.



## Spotlight

- Whilst billing clarity is generally good, there is an opportunity to more effectively communicate how charges are calculated.
- There is an opportunity to explore what actions could be taken to help community members feel more in control of their bill.

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

**7.98/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is positive, with strong satisfaction around reliable supply and customer service, but tempered by concerns about rising costs and water quality in some areas.



**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: 828  
Portsmouth Water Base  
Size: 51



# Portsmouth Water: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr

88% are satisfied overall

2% are not satisfied

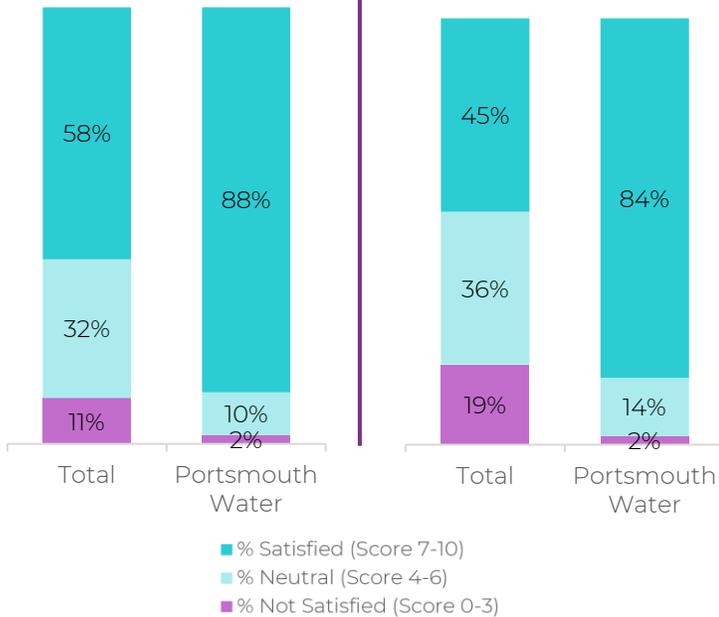
Overall satisfaction - water

84% are satisfied with value for money

2% are not satisfied

Overall value for money satisfaction

Satisfaction – both overall and in terms of value for money – remains well above industry average.



## Why have you given this overall satisfaction score?

*“The only thing I do wonder is whether the water quality could be improved in our area.”*

*Female, 53, Live with family, 6/10 satisfaction score*

*“Very happy, not had any disruptions to service or problems with the quality of water.”*

*Male, 45, Live with partner, 10/10 satisfaction score*

*“Very good, but could always have better Comms.”*

*Female, 49, Live with family, 8/10 satisfaction score*

Continue to build on positive community member experiences.

Total Base Size: 828  
Portsmouth Water Base Size: 51



# Portsmouth Water: Barometer findings

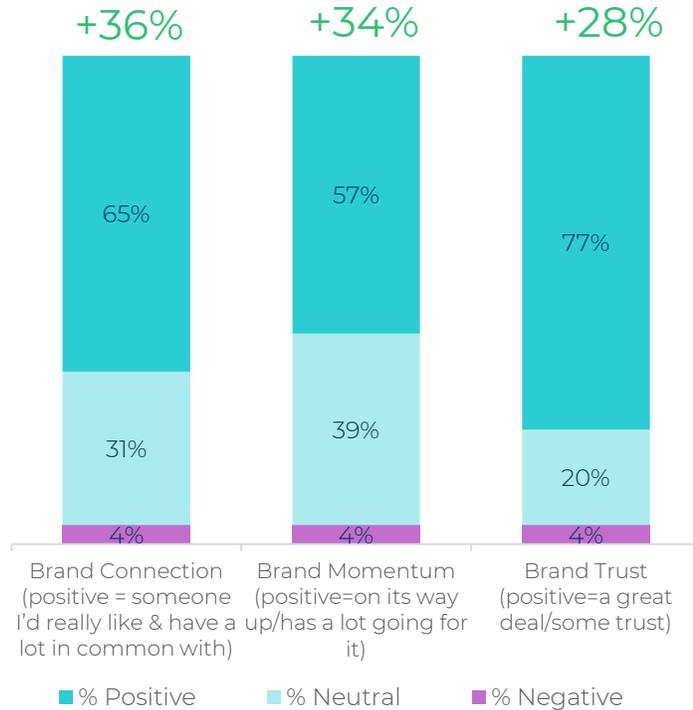
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Portsmouth Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	78%	+19%	+32%
Improves our rivers	71%	+26%	+45%
Creates a greener future	71%	+22%	+42%
Spends community members' money wisely	71%	+26%	+46%
Contributes to our communities	67%	+14%	+34%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	88%	+10%	+31%
Colour and Appearance	96%	+2%	+13%
Taste and Smell	88%	+2%	+10%
Safety of Drinking Water	94%	+4%	+15%
Reliability of Supply	96%	-2%	+11%
Water Pressure	96%	+2%	+17%

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

In line with overall satisfaction, scores are positive across almost all KPIs, compared with the initial November wave, and the industry average.

Total Base Size: 828  
Portsmouth Water Base Size: 51



# Portsmouth Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

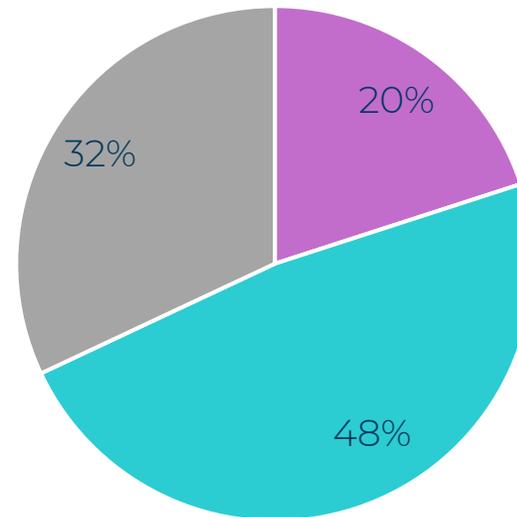
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Quality of drinking water - 54%
2. Reliability of water supply - 40%
3. Responsiveness when things go wrong – 31%

When asked to select the single most important topic, quality of drinking water was most selected at 25%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

48% are just looking at the charges on their bill, while 1/5 aren't reading their bill at all.

How charges are calculated (22%) and meter readings/ estimated usage (18%) were viewed as the most unclear parts of community member bills. Nearly 60% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	22%
Meter readings / estimated usage	18%
Standing charges	14%
Differences between water and wastewater charges	12%
Comparison with previous bills	2%
Help or contact information	2%
Other	2%
None – my bill is clear	58%

Whilst billing clarity is generally good, there is an opportunity to more effectively communicate how charges are calculated.

Total Base Size: 828  
Portsmouth Water Base  
Size: 51



# Portsmouth Water: Spotlight findings

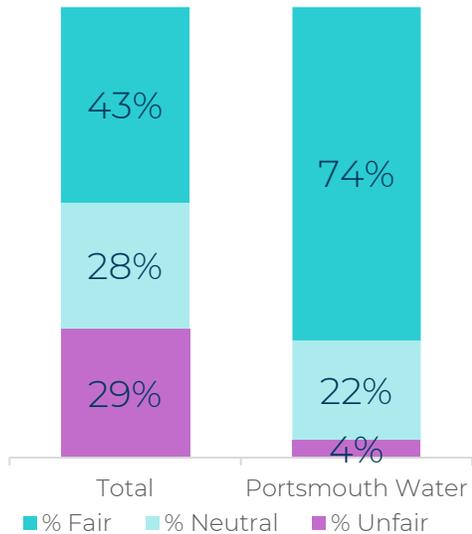
Billing and value for money



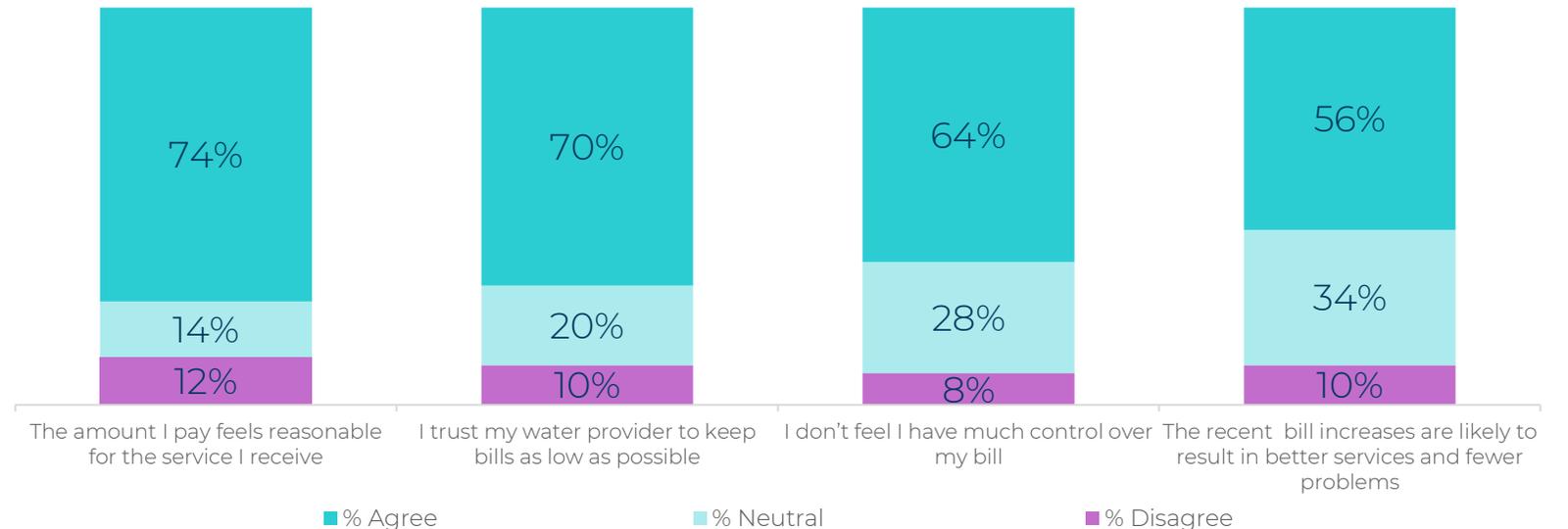
The voice for water consumers  
Llais defnyddwyr dŵr

2/3s of the community felt that the charges they pay are fair. 74% feel that the amount they pay feels reasonable for the money they pay feels reasonable for the service and 70% trust their water provider to keep bills as low as possible. 56% believe that recent bill increases are likely to result in better services and fewer problems. 56% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



There is an opportunity to explore what actions could be taken to help community members feel more in control of their bill.

Total Base Size: 828  
Portsmouth Water Base Size: 51



# Portsmouth Water: Spotlight findings

What could Portsmouth Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Would like to see a report of what the charges include every 6 months How the bill is broken down like we have for the rates.”*

*68, Live with partner*

*“Actually maintain pipes instead of only fixings them when there is a problem!!!”*

*32, Live with partner*

*“Show how money is spent, reduce leaks and keep customers informed about improvements.”*

*45, Live with child/ren and other adult family member*

*“Faster repairs when issues occur, ensuring problems are resolved permanently rather than temporarily.”*

*64, Live with family*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice

# Barometer and Spotlight Report

**SES Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# SES Water

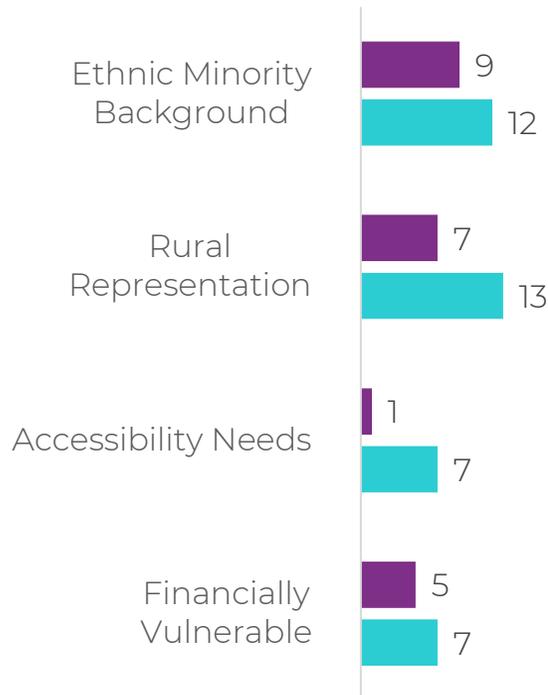
Community population



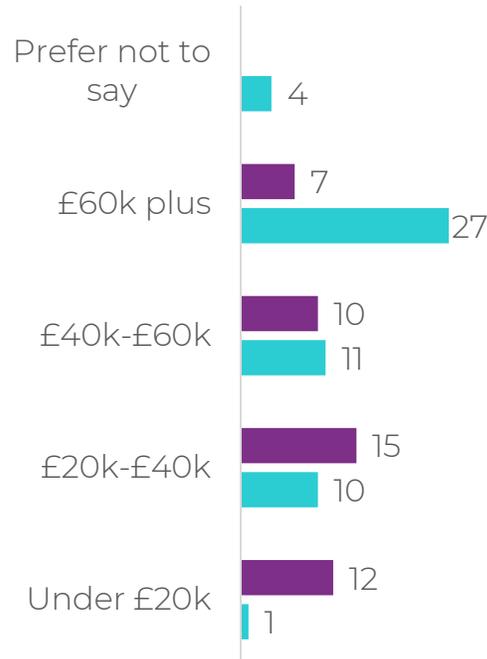
The voice for water consumers  
Llais defnyddwyr dŵr

SES Water community members: 53

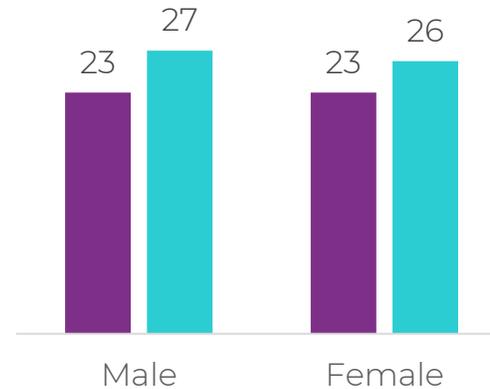
## Inclusivity



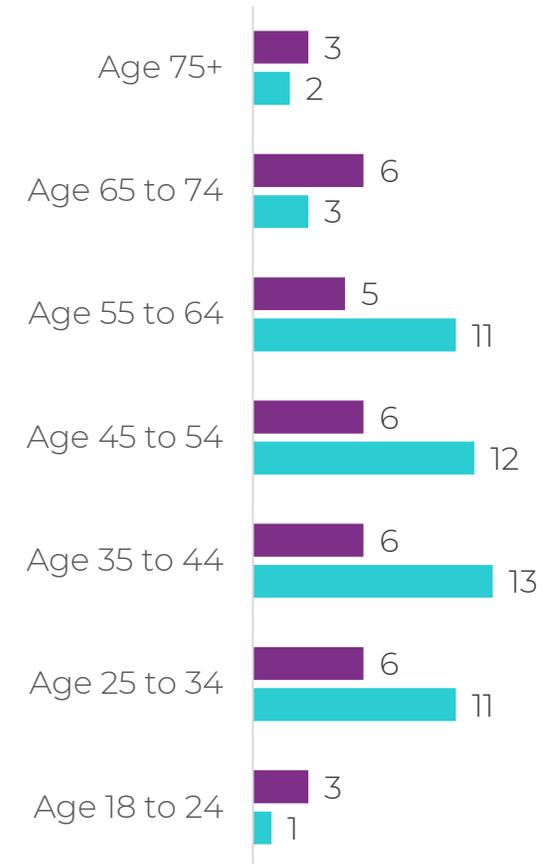
## Household income



## Gender



## Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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	Jan 2026 SES Water community Agreement %	+/- difference % SES Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % SES Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	40%	-2%	26%	+13%
Recent Experience (Positive recent experience)	47%	-5%	42%	+6%
General outlook (Positive outlook)	55%	+1%	47%	+8%
Communication (Fair/good communication)	38%	+2%	35%	+3%
Brand Connection (someone I'd really like and have a lot in common with)	49%	+14%	29%	+20%
Brand Momentum (salience) (on its way up/has a lot going for it)	36%	+3%	23%	+13%
Trust (a great deal/some trust)	60%	+4%	48%	+12%
Past 4 Week Interaction	47%	+14%	45%	+3%
Past 4 Week Disruption	4%	-5%	9%	-5%
Past 4 Week Water Quality Issues	6%	-5%	9%	-3%
<b>Overall Value for Money</b>	51%	+3%	45%	+6%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	68%	+10%	58%	+10%
Colour and Appearance	79%	0%	84%	-4%
Taste and Smell	77%	+9%	78%	-1%
Safety of Drinking Water	77%	+7%	79%	-2%
Reliability of Supply	83%	+2%	85%	-2%
Water Pressure	72%	-1%	79%	-7%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and SES Water Base Size: 53

# Executive summary

Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- Continue working to maintain positive satisfaction scores.
- Brand connection, momentum, and trust are positive. SES sentiment and Water KPIs also perform well. Continue to build on positive experiences.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated, and provide information surrounding meter readings/estimated usage.
- There is an opportunity to improve transparency around how increased bills will be used to improve overall service, as well as to help community members manage the water they use to improve control of their bill.

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

**7.09/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is leaning towards positive, with people generally satisfied with reliable water quality and service. But there are repeated mentions of poor communication, rising bills, leaks, and concerns about long-term value and transparency.



**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: 828  
SES Water Base Size: 53



# SES Water: Barometer findings

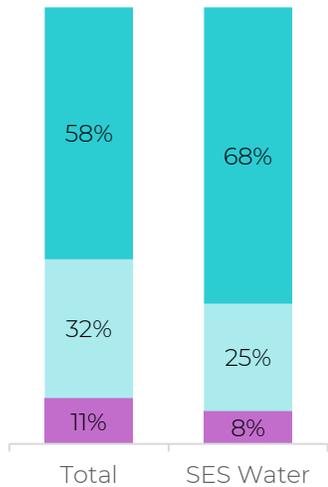


The voice for water consumers  
Llais defnyddwyr dŵr

68% are satisfied overall

8% are not satisfied

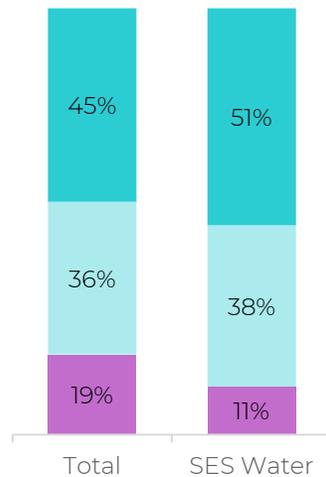
Overall satisfaction - water



51% 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)

Satisfaction and value for money satisfaction remain higher than the industry average and there are low levels of dissatisfaction. Isolated incidents of dissatisfaction are driven by increases in bills, leaks, and poor-quality water.

## Why have you given this overall satisfaction score?

*"I am satisfied that I haven't had any issues with my water, but I'm not satisfied about the price."*

*Female, 47, Live alone, 8/10 satisfaction score*

*"The water supply does everything I need it to. Its there, its clean."*

*Male, 58, Live with family, 10/10 satisfaction score*

*"Constant issues with leaking pipes. Bills getting higher, poor quality water."*

*Male, 47, Live with family, 4/10 satisfaction score*



# SES Water: Barometer findings

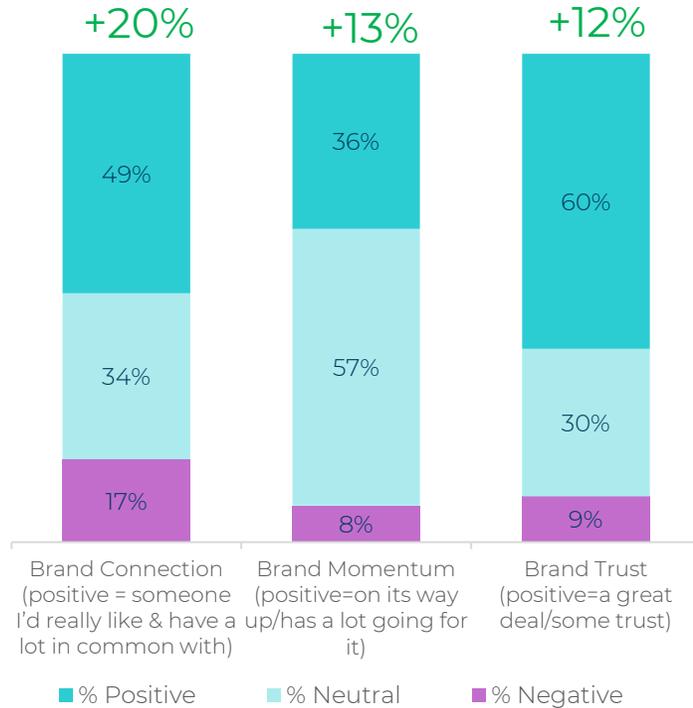
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that SES Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	59%	+9%	+13%
Improves our rivers	43%	+21%	+17%
Creates a greener future	43%	+5%	+14%
Spends community members' money wisely	42%	17%	+17%
Contributes to our communities	45%	12%	+12%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	68%	+10%	+10%
Colour and Appearance	79%	0%	-4%
Taste and Smell	77%	+9%	-1%
Safety of Drinking Water	77%	+7%	-2%
Reliability of Supply	83%	+2%	-2%
Water Pressure	72%	-1%	-7%

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

Brand Connection, momentum, and trust are positive. SES sentiment and Water KPIs also perform well. Continue to build on positive experiences.

Total Base Size: 828  
SES Water Base Size: 53



# SES Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

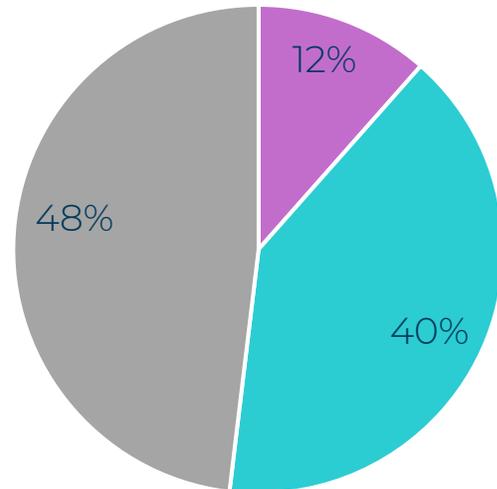
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Value for money and rising bills - 52%
2. Quality of drinking water - 42%
3. Reliability of water supply and pressure - 39%

When asked to select the single most important topic, value for money and rising bills was most selected at 27%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

48% are reading all their bill, while 40% are only checking the charges and the amount they owe.

How charges are calculated (46%) and meter readings/estimated usage (33%) were viewed as the most unclear parts of community member bills. 29% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	46%
Meter readings / estimated usage	33%
Standing charges	27%
Differences between water and wastewater charges	
Comparison with previous bills	12%
Help or contact information	6%
Other	4%
<b>None – my bill is clear</b>	<b>29%</b>

There is an opportunity to address billing clarity particularly around how charges are calculated and provide information surrounding meter readings/estimated usage.

Total Base Size: 828  
SES Water Base Size: 53



# SES Water: Spotlight findings

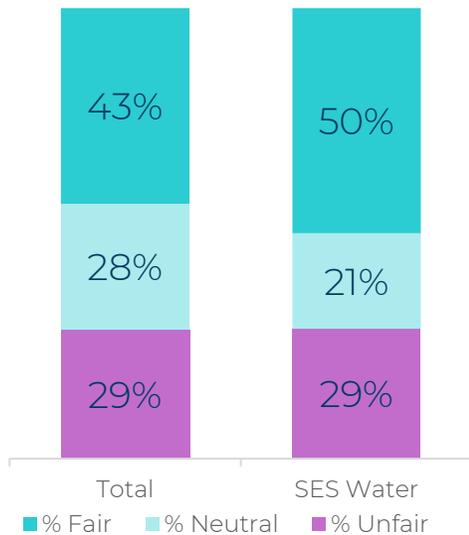
Billing and value for money



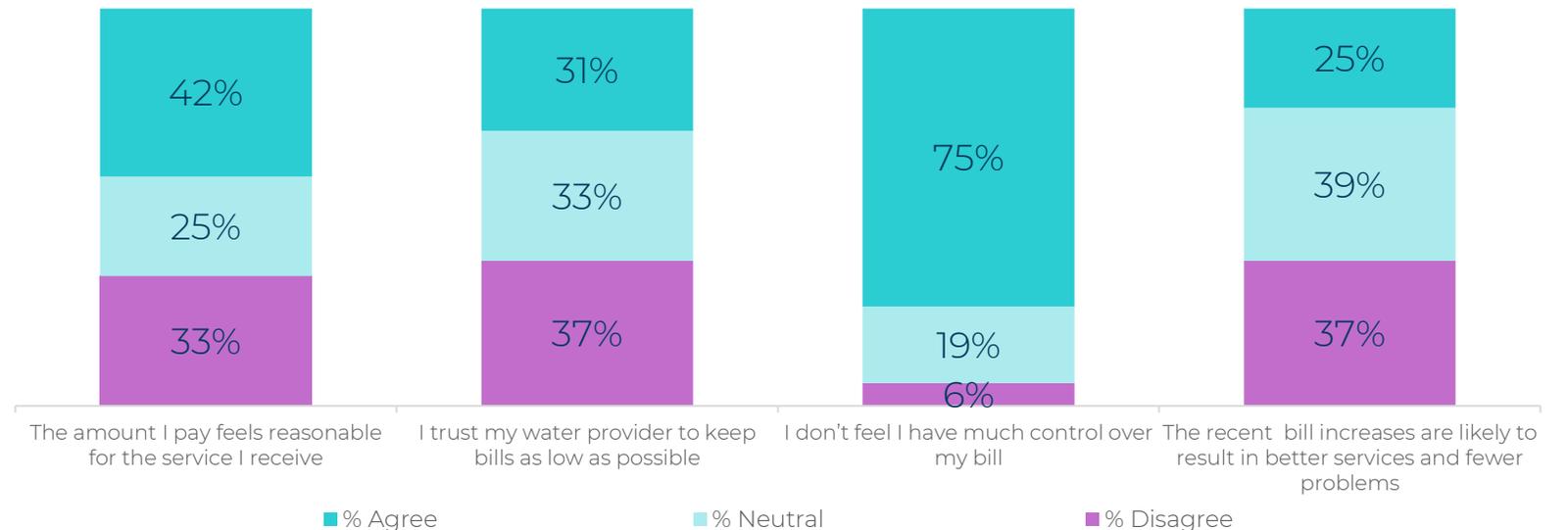
The voice for water consumers  
Llais defnyddwyr dŵr

50% of the community felt that the charges they pay are fair, and 42% feel that the amount they pay feels reasonable for the service. 31% trust their water provider to keep bills as low as possible. Just 1/4 believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



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

There is an opportunity to improve transparency around how increased bills will be used to improve overall service, as well as to help community members manage the water they use to improve control of their bill.

Total Base Size: 828  
SES Water Base Size: 53



# SES Water: Spotlight findings

What could SES Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*"In every bill, provide a comparison showing what my bill would have been in other local areas, given the same usage."*

*57, Live with partner*

*"Developing an app to track live water usage and split billing between standing charge and actual use."*

*48, Live alone*

*"Complete transparency - what the money from our bills is being used for - a break down of all aspects and clear, informative data/figures/charts etc. Clear information / Live information when there are issues / problems/ supply interruptions/ pressure issues (on their website - so customers can see exactly what might be going on). Excellent customer service, highly responsive and efficient."*

*46, Live with family*

*"Provide breakdowns on how my money paid will/has been allocated to better the water supplied to me. Also provided more clarity on how clean the drinking water is supplied to my property and what may not be so clean about it."*

*37, Live with family*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**Severn Trent Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

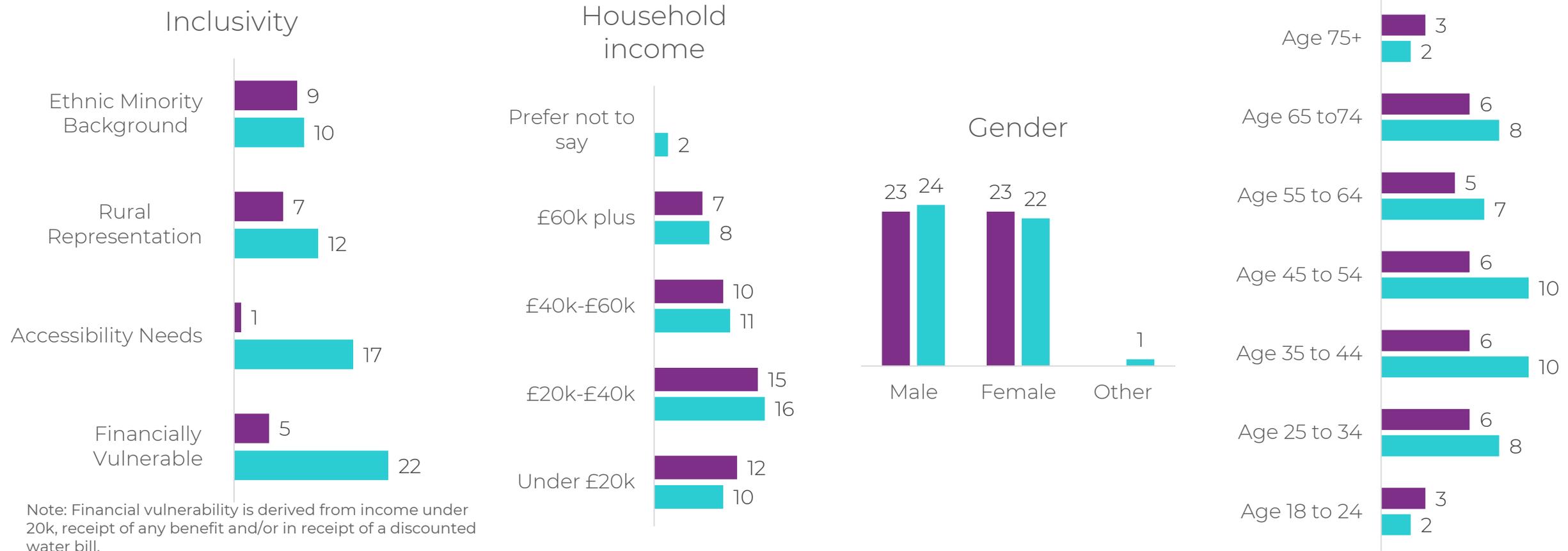
# Severn Trent Water

Community population



The voice for water consumers  
Llais defnyddwyr dŵr

Severn Trent community members: 46



**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.

current sample      minimum sample

# Dashboard summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Jan 2026 Severn Trent Water community Agreement %	+/- difference % Severn Trent Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Severn Trent Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	26%	-1%	26%	0%
Recent Experience (Positive recent experience)	35%	-8%	42%	-7%
General outlook (Positive outlook)	46%	-3%	47%	-2%
Communication (Fair/good communication)	35%	-6%	35%	0%
Brand Connection (someone I'd really like and have a lot in common with)	11%	-9%	29%	-18%
Brand Momentum (salience) (on its way up/has a lot going for it)	13%	-5%	23%	-10%
Trust (a great deal/some trust)	44%	-7%	48%	-5%
Past 4 Week Interaction	39%	-13%	45%	-5%
Past 4 Week Disruption	7%	-2%	9%	-2%
Past 4 Week Water Quality Issues	9%	-5%	9%	0%
Past 4 Week Sewerage issues	0%	0%	4%	-4%
<b>Overall Value for Money</b>	35%	-1%	45%	-11%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	52%	+4%	58%	-5%
Colour and Appearance	76%	0%	84%	-7%
Taste and Smell	74%	+6%	78%	-4%
Safety of Drinking Water	74%	-2%	79%	-5%
Reliability of Supply	83%	-3%	85%	-2%
Water Pressure	76%	+4%	79%	-3%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	57%	+13%	57%	0%
Reducing smells from sewage treatment works	28%	+2%	39%	-11%
Maintenance of sewerage pipes and treatment works	35%	+1%	41%	-7%
Cleaning wastewater properly before release back into environment	33%	+1%	36%	-3%
Minimising sewer flooding	35%	+1%	38%	-3%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Severn Trent Base  
 Size: 46

# Executive summary

Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- There is an opportunity to improve communication and showcase the work that the company does to ensure a consistent and safe water supply.
- There are opportunities to address below industry average scores on brand connection, momentum, and trust.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges, and standing charges.
- Clear opportunity to address poor perceptions of fairness, value for money, and trust in keeping bills low. There is also an opportunity to more clearly demonstrate how bill increases will be invested and how community members can feel more in control of their bill.

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

**6.41/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is neutral to mildly positive. Most people experience a reliable water supply with few day-to-day issues, but this is consistently undermined by concerns about high and rising bills, poor transparency and communication, and doubts about investment in leaks, flooding, communities, and the environment.



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

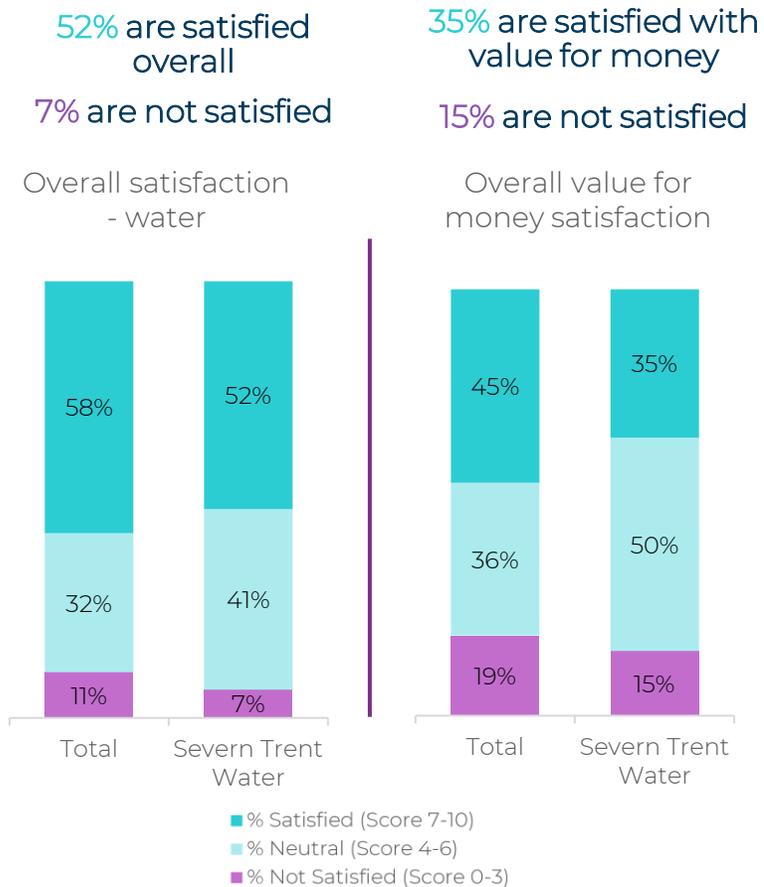
Total Base Size: 828  
Severn Trent Base Size: 46



# Severn Trent Water: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr



Overall satisfaction is marginally below industry average. Value for money satisfaction is also lower than the industry average, and this is driven by high levels of neutrality rather than dissatisfaction.

## Why have you given this overall satisfaction score?

*"Have no major issues with STW but would like more transparency on bill breakdown charges."*

*Male, 53, Live alone, 7/10 satisfaction score*

*"Recently I've had a leaflet about how they manage flooding so that was nice to see."*

*Female, 33, Live alone, 7/10 satisfaction score*

*"Never hear anything from them, get a bill, pay it monthly and that's about it!"*

*Male, 44, Live with partner/children, 3/10 satisfaction score*

There is an opportunity to improve communication and showcase the work that the company does to ensure a consistent and safe water supply.

Total Base Size: 828  
Severn Trent Base Size: 46



# Severn Trent Water: Barometer findings

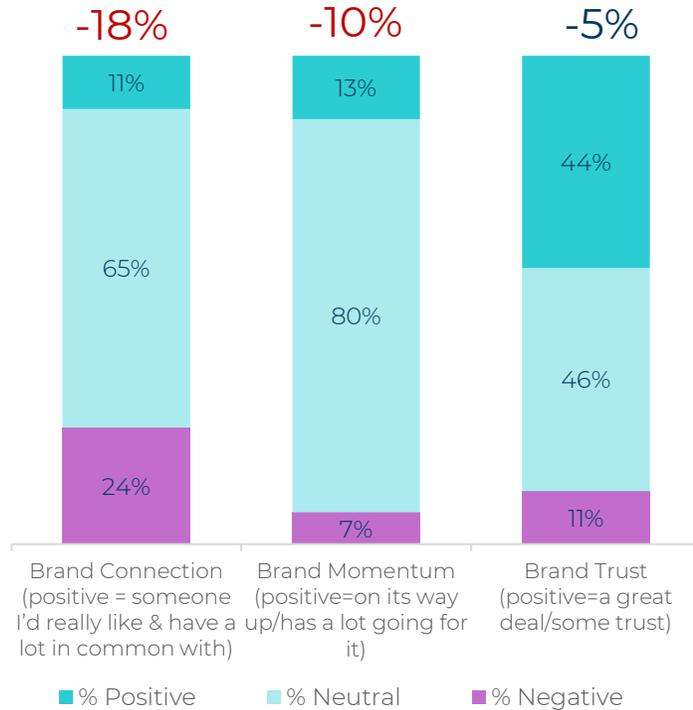
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Severn Trent Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	41%	-3%	-5%
Improves our rivers	15%	-3%	-11%
Creates a greener future	17%	-13%	-12%
Spends community members' money wisely	11%	-3%	-14%
Contributes to our communities	37%	+23%	+4%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	52%	+4%	-5%
Colour and Appearance	76%	0%	-7%
Taste and Smell	74%	+6%	-4%
Safety of Drinking Water	74%	-2%	-5%
Reliability of Supply	83%	-3%	-2%
Water Pressure	76%	+4%	-3%
<b>Sewerage</b>			
Overall Satisfaction	57%	+13%	0%
Reducing smells from sewage treatment works	28%	+2%	-11%
Maintenance of sewerage pipes and treatment works	35%	+1%	-7%
Cleaning wastewater properly before release back into environment	33%	+1%	-3%
Minimising sewer flooding	35%	+1%	-3%

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

There are opportunities to address below industry average scores on brand connection, momentum and trust.

Total Base Size: 828  
Severn Trent Base Size: 46



# Severn Trent Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

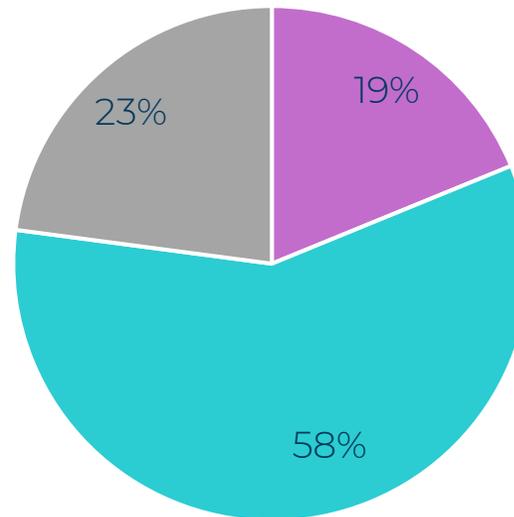
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 60%
2. Value for money and rising bills - 48%
3. Quality of drinking water - 42%

When asked to select the single most important topic, value for money, and rising bills was most selected at 35%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (58%) are just looking at the charges on their bill, with 23% stating that they read the whole thing.

How charges are calculated (44%) and meter readings/estimated usage (31%) were viewed as the most unclear parts of community member bills. 1/3 had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	44%
Meter readings / estimated usage	31%
Differences between water and wastewater charges	27%
Standing charges	15%
Comparison with previous bills	8%
Help or contact information	2%
Other	6%
None – my bill is clear	33%

There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.

Total Base Size: 828  
Severn Trent Base Size: 46



# Severn Trent Water: Spotlight findings

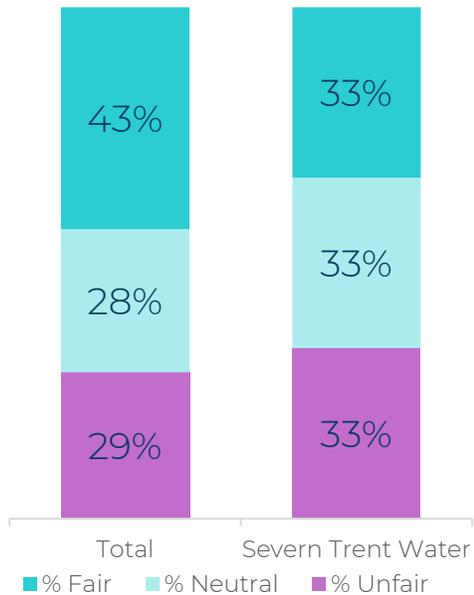
Billing and value for money



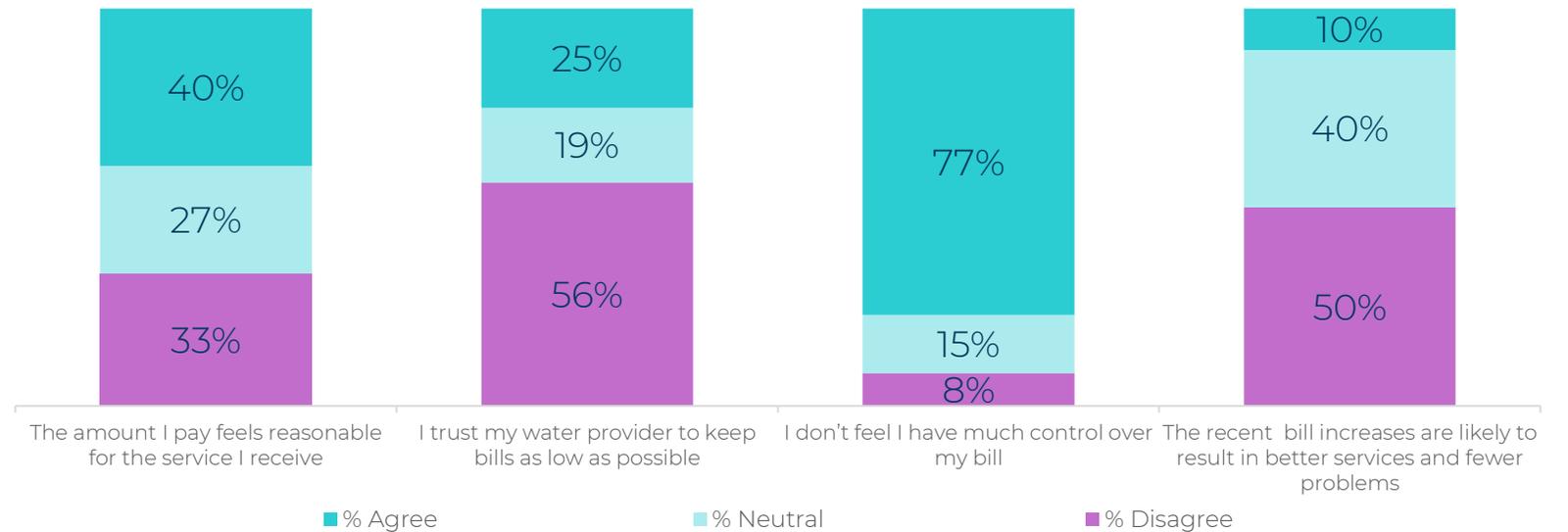
The voice for water consumers  
Llais defnyddwyr dŵr

Just 1/3 of the community felt that the charges they pay are fair. 40% feel that the amount they pay feels reasonable for the service and just 25% trust their water provider to keep bills as low as possible. Just 10% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Clear opportunity to address poor perceptions of fairness, value for money, and trust in keeping bills low. There is also an opportunity to more clearly demonstrate how bill increases will be invested and how community members can feel more in control of their bill.

Total Base Size: 828  
Severn Trent Base Size: 46



# Severn Trent Water: Spotlight findings

What could Severn Trent Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Actually communicate with me other than to send me my bill!”*

*44, Live with family*

*“As I am on a water meter they know how much water I am using. So why didn't they notify me when there was a sudden increase in the amount of water the meter said I had been using. This should have raised questions and they should contact you if this happens. As I am registered disabled I cannot lift the cover to check my meter readings.”*

*73, Live alone*

*“Give a breakdown of how money is actually spent both in terms of percentage but also total amounts, and where relevant costs for large projects too.”*

*49, Live with family*

*“I just feel as a single household my bills are high I have just moved house and now have a meter I'm hoping this will give me control and help to reduce my bills. I am also concerned that a lot of the money that could be used to improve services is paid to shareholders. With so much needed to improve standards this feels very wrong..”*

*74, Lives alone*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**South East Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

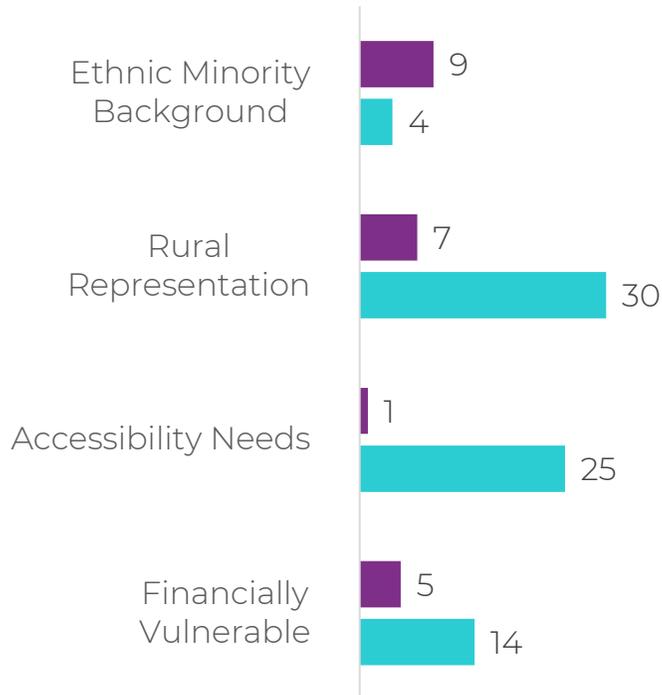
# South East Water

Community population

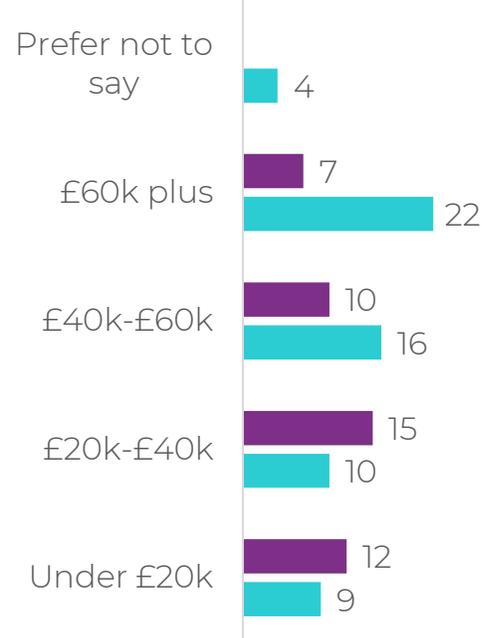


South East Water community members: 61

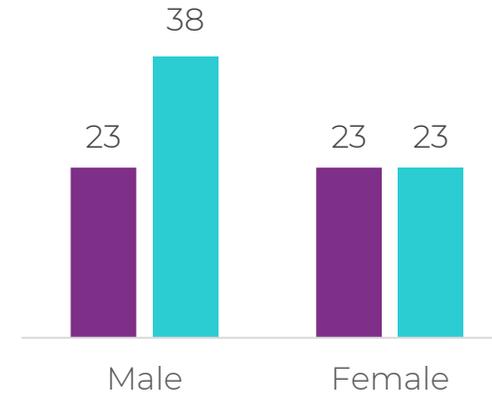
## Inclusivity



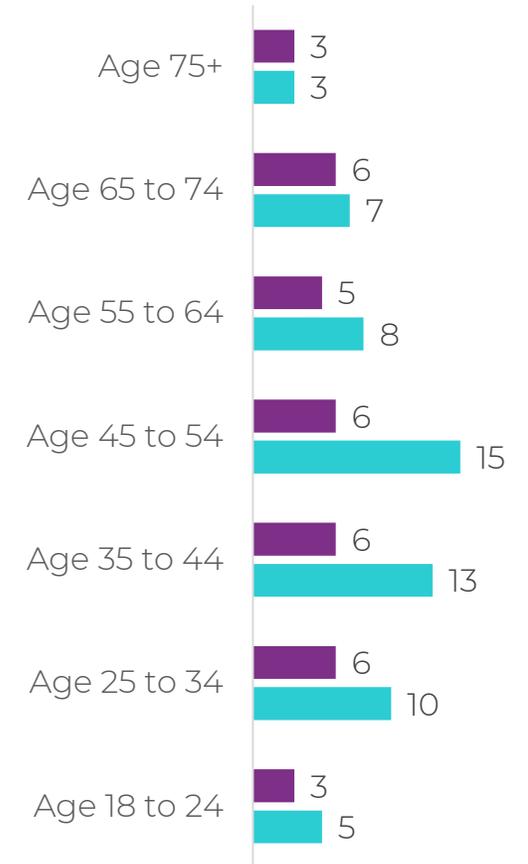
## Household income



## Gender



## Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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	Jan 2026 South East Water community Agreement %	+/- difference % South East Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % South East Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	15%	-10%	26%	-12%
Recent Experience (Positive recent experience)	20%	-9%	42%	-22%
General outlook (Positive outlook)	21%	-18%	47%	-26%
Communication (Fair/good communication)	30%	-5%	35%	-5%
Brand Connection (someone I'd really like and have a lot in common with)	13%	-11%	29%	-16%
Brand Momentum (salience) (on its way up/has a lot going for it)	7%	-8%	23%	-16%
Trust (a great deal/some trust)	16%	-23%	48%	-32%
Past 4 Week Interaction	82%	+43%	45%	+37%
Past 4 Week Disruption	16%	+7%	9%	+8%
Past 4 Week Water Quality Issues	18%	+11%	9%	+9%
<b>Overall Value for Money</b>	31%	0%	45%	-14%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	31%	-6%	58%	-27%
Colour and Appearance	85%	+9%	84%	+2%
Taste and Smell	84%	+10%	78%	+5%
Safety of Drinking Water	79%	+3%	79%	-1%
Reliability of Supply	72%	-6%	85%	-13%
Water Pressure	74%	0%	79%	-5%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and South East Water Base Size: 61

# Executive summary

Overview of key findings



## Barometer

- Clear opportunity to build on learnings from the recent Accountability Session, particularly around communication and trust building.
- There are opportunities to start to rebuild brand connection, momentum, and trust among community members.



## Spotlight

- A potential opportunity to provide greater clarity on differences between water and wastewater charges, and how bills are calculated.
- Opportunities to demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

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

**5.20/10 vs 6.51/10 (Total)**

## Why do community members feel this way?

Overall sentiment is mixed. While some people personally experience acceptable water quality and service, widespread outages, leaks, poor communication, negative media coverage, and rising bills have badly damaged trust and confidence in the company.



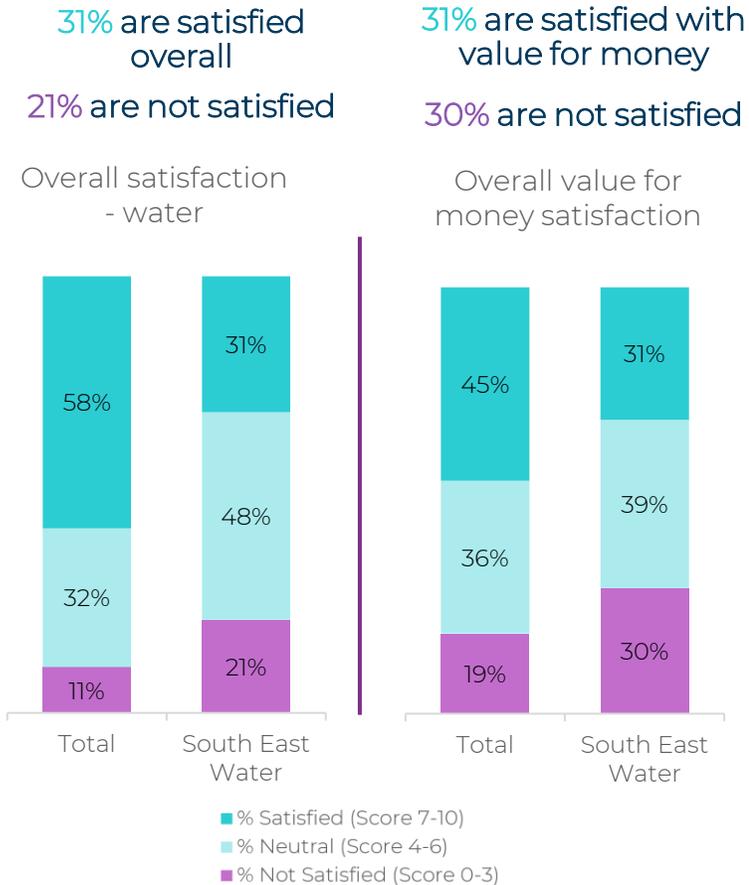
**Accountability call out:** An ad hoc accountability process is in place triggered by the Pembury Water Treatment Works outage and subsequent boil water notice affecting Tunbridge Wells, November-December 2025. There are currently no additional ad hoc Accountability Session triggers in discussion across the surveys, community, and CCW's external insights.



# South East Water: Barometer Findings



The voice for water consumers  
Llais defnyddwyr dŵr



Overall satisfaction is considerably lower than the industry average. Value for money satisfaction is also lower, and dissatisfaction is higher. Sentiment is likely driven by recent supply issues which were widely discussed within the communities.

## Why have you given this overall satisfaction score?

*“Bill is still too expensive, still a hosepipe ban and houses without water.”*

*Female, 36, Live with child/ren, 4/10 satisfaction score*

*“You only have to look at the issues we have had in the Tunbridge Wells area the last few years.”*

*Female, 58, Live with partner, 1/10 satisfaction score*

*“My service has been faultless but it seems to be a postcode lottery and I don't feel this asset should be.”*

*Male, 57, Live with partner, 10/10 satisfaction score*

Clear opportunity to build on learnings from the recent ad-hoc Accountability Session, particularly around communication and trust building.

Total Base Size: 828  
South East Water Base Size: 61



# South East Water: Barometer findings

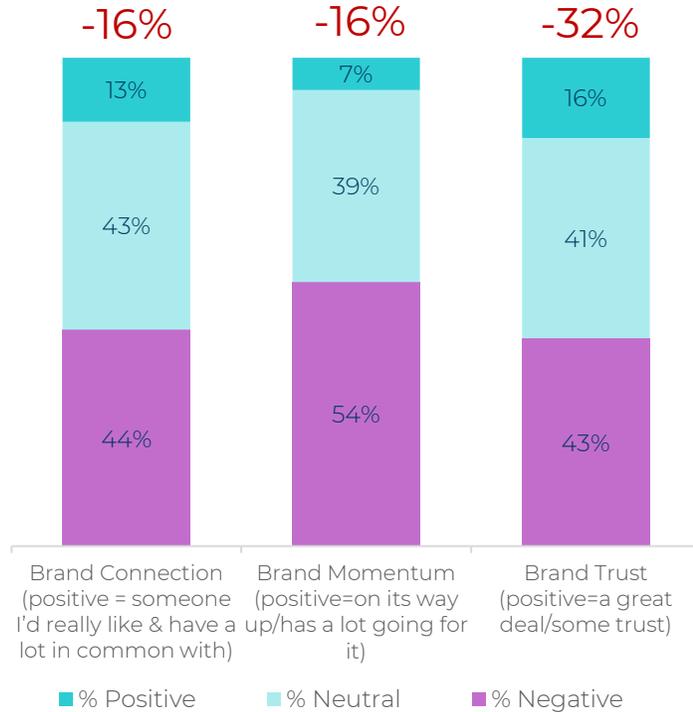
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Anglian Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	31%	-2%	-15%
Improves our rivers	21%	-1%	-5%
Creates a greener future	25%	-1%	-4%
Spends community members' money wisely	20%	0%	-5%
Contributes to our communities	23%	-3%	-10%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	31%	-6%	-27%
Colour and Appearance	85%	+9%	+2%
Taste and Smell	84%	+10%	+5%
Safety of Drinking Water	79%	+3%	-1%
Reliability of Supply	72%	-6%	-13%
Water Pressure	74%	0%	-5%

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

There are opportunities to start to rebuild brand connection, momentum, and trust amongst community members.

Total Base Size: 828  
South East Water Base Size: 61



# South East Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

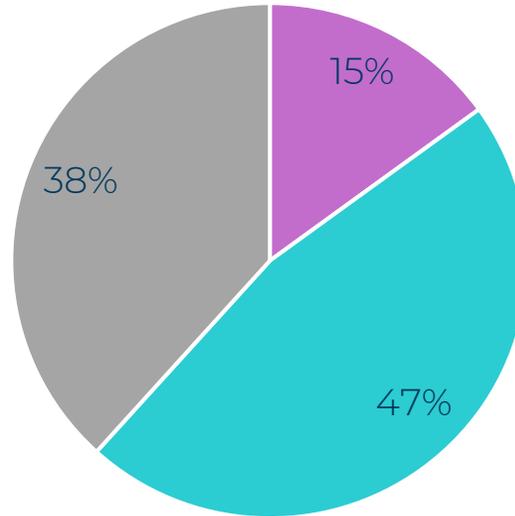
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

### Select the 3 most important themes

1. Reliability of water supply and pressure – 41%
2. Quality of drinking water - 38%
3. Value for money & rising bills – 36%

When asked to select the single most important topic, value for money and quality of drinking water was most selected at 14%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (47%) are just looking at the charges on their bill, with 38% stating that they read the whole thing.

Bill clarity is higher than average this community, with 50% stating that nothing is unclear. How charges are calculated (22%) and meter readings/estimated usage (25%) were viewed as the most unclear parts of community member bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
Meter readings / estimated usage	25%
How charges are calculated	22%
Standing charges	15%
Differences between water and wastewater charges	-
Comparison with previous bills	13%
Help or contact information	5%
Other	-
None – my bill is clear	50%

A potential opportunity to provide greater clarity on meter readings/estimated usage and how bills are calculated.



# South East Water: Spotlight findings

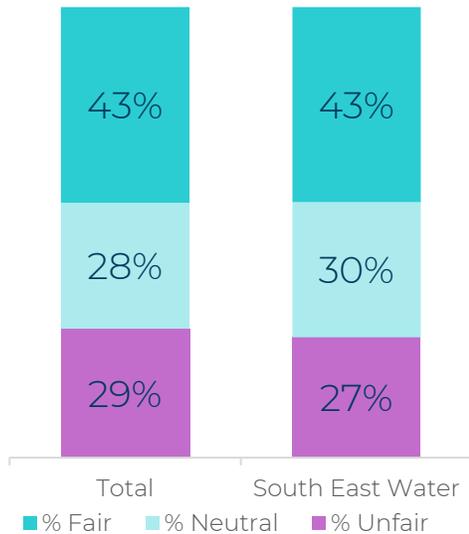
Billing and value for money



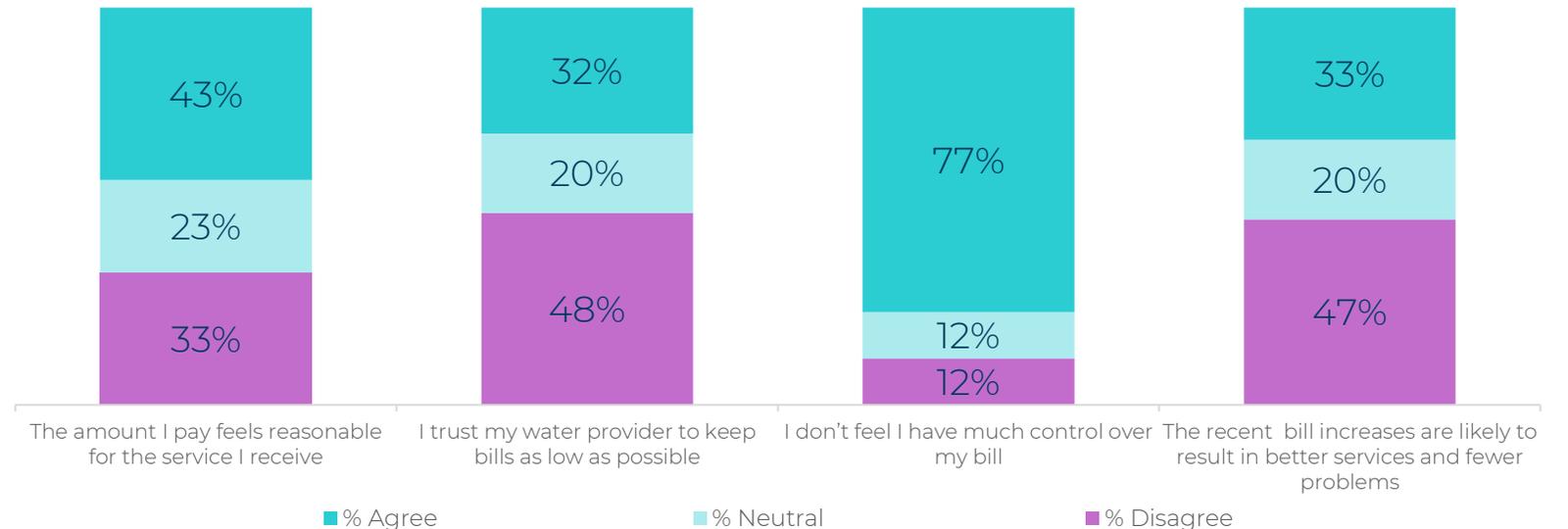
The voice for water consumers  
Llais defnyddwyr dŵr

43% of the community felt that the charges they pay are fair. 43% feel that the amount they pay feels reasonable for the service and 32% trust their water provider to keep bills as low as possible (both below industry average). 33% believe that recent bill increases are likely to result in better services and fewer problems – above the industry average.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Opportunities to demonstrate how increases in community member bills will be invested to improve service, and to provide insights to help community members feel more in control of their bill.

Total Base Size: 828  
South East Water Base Size: 61



# South East Water: Spotlight findings

What could South East Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“I think the amount we pay would be reasonable amount of money if we could be assured that the drinking water is clear and safe to drink and if we didn't have stoppages or water pressure issues. Therefore, SEW needs to address these two issues urgently in order to improve the value for money in relation to our water service. Basically, at present it isn't value for money as we are not received the water service we are paying for.”*

*58, Live with partner*

*“Put the bills up so we get a system fit for 21st century, none of this money should go to shareholders or staff...purely to resetting the infrastructure that has been neglected for years.”*

*57, Live with partner*

*“Reduce water wastage from leaks, I feel that I am contributing to what is wasted.”*

*57, Live with partner and other adult family members*

*“Give single occupiers a discount... There is lots of talk about helping the vulnerable and those on a low income but nothing about single occupiers who are not on a high wage who are also struggling...”*

*58, Live alone*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**South Staffs Water and Cambridge Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

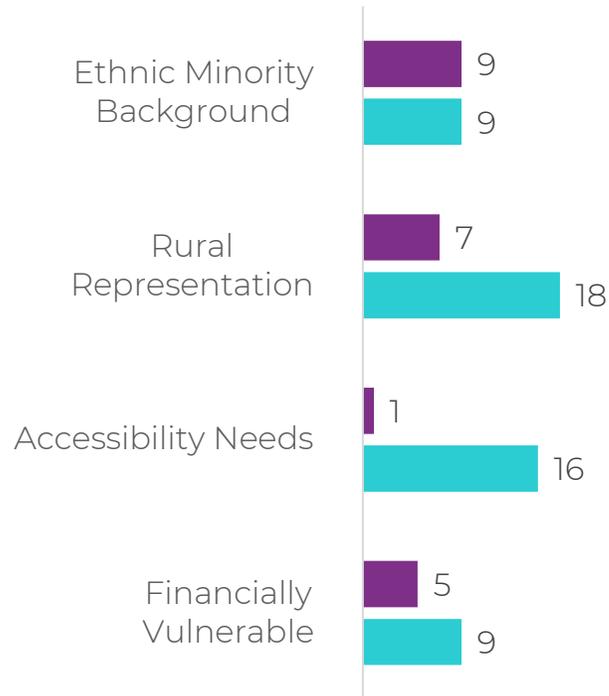
# South Staffs Water and Cambridge Water

Community population

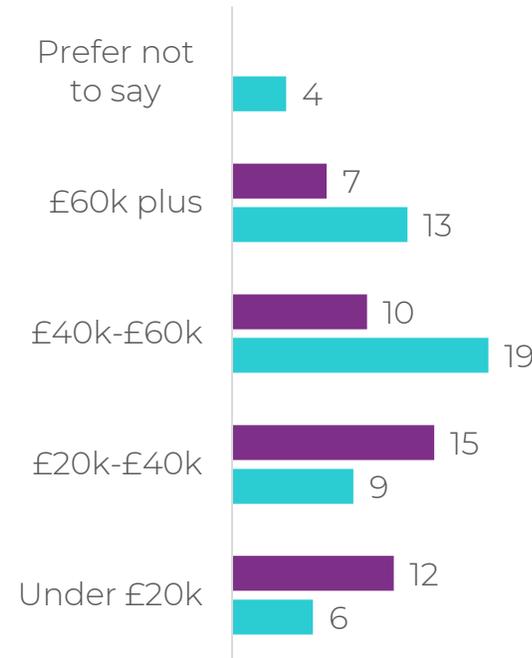


South Staffs Water community members: 30  
 Cambridge Water community members: 21

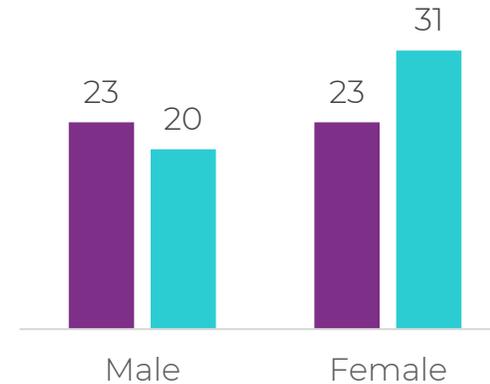
## Inclusivity



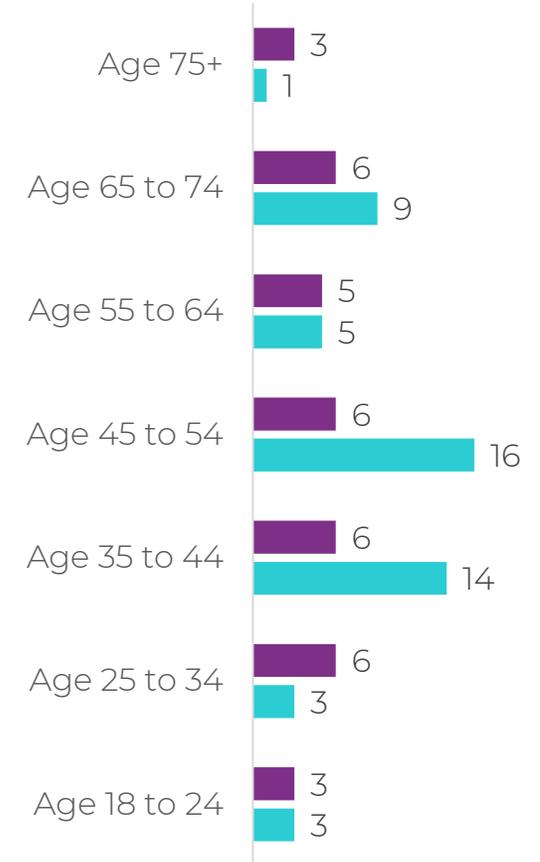
## Household income



## Gender



## Age



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

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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	Jan 2026 South Staffs Water and Cambridge Water community Agreement %	+/- difference % South Staffs Water and Cambridge Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % South Staffs Water and Cambridge Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	26%	-1%	26%	-1%
Recent Experience (Positive recent experience)	37%	0%	42%	-4%
General outlook (Positive outlook)	55%	+7%	47%	+8%
Communication (Fair/good communication)	24%	+6%	35%	-11%
Brand Connection (someone I'd really like and have a lot in common with)	31%	+10%	29%	+2%
Brand Momentum (salience) (on its way up/has a lot going for it)	22%	+13%	23%	-1%
Trust (a great deal/some trust)	61%	+9%	48%	+13%
Past 4 Week Interaction	59%	+30%	45%	+14%
Past 4 Week Disruption	4%	-1%	9%	-5%
Past 4 Week Water Quality Issues	8%	-1%	9%	-1%
<b>Overall Value for Money</b>	47%	+3%	45%	+2%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	69%	+4%	58%	+11%
Colour and Appearance	82%	-5%	84%	-1%
Taste and Smell	82%	+2%	78%	+4%
Safety of Drinking Water	84%	+2%	79%	+5%
Reliability of Supply	82%	-5%	85%	-2%
Water Pressure	73%	-1%	79%	-7%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

# Executive summary

Overview of key findings



## Barometer

- Opportunities to improve transparency and demonstrate how increases in billing will be used to improve the service that community members receive.
- Trust is relatively high but there is an opportunity to improve brand momentum.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.
- Opportunities to demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

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

**6.82/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is positive, with most experiencing a reliable water supply and few issues. Ongoing frustration about rising and confusing bills, poor transparency, patchy communication, and doubts about value for money and environmental commitment.



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



# South Staffs Water and Cambridge Water: Barometer findings

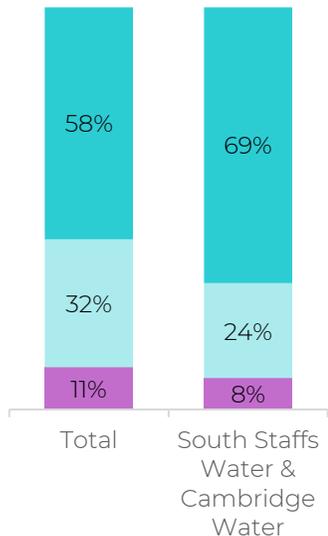


The voice for water consumers  
Llais defnyddwyr dŵr

69% are satisfied overall

8% are not satisfied

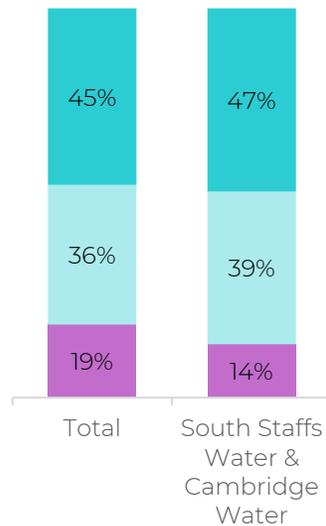
Overall satisfaction - water



47% 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 higher and dissatisfaction is lower than the industry average. Value for money is in line with the industry average.

## Why have you given this overall satisfaction score?

*"Feel there needs to be more transparency around water levels and how money is used."*

*Male, 40, Live with family, 8/10 satisfaction score, South Staffs Water*

*"I chose mid way because of the recent increases in peoples bills and the apparent lack of knowledge or transparency from the company as to why the bills should rise so steeply."*

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

*"Very dissatisfied on the service we received since the water pipe leaking in our private driveway for more than 3 weeks."*

*Female, 41, Live with child/ren, 2/10 satisfaction score, South Staffs Water*

Opportunities to improve transparency and demonstrate how increases in billing will be used to improve the service that community members receive.

Total Base Size: 828 and South Staffs and Cambridge Water Base Size: 51



# South Staffs Water and Cambridge Water : Barometer findings

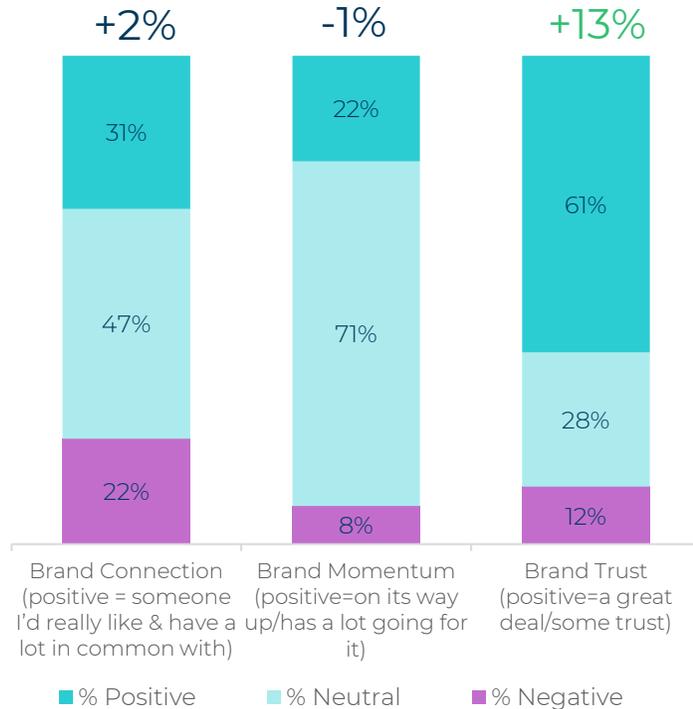
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that South Staffs Water and Cambridge Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	45%	+6%	-1%
Improves our rivers	24%	+11%	-2%
Creates a greener future	26%	+6%	-3%
Spends community members' money wisely	18%	+9%	-7%
Contributes to our communities	30%	+12%	-3%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	69%	+4%	+11%
Colour and Appearance	82%	-5%	-1%
Taste and Smell	82%	+2%	+4%
Safety of Drinking Water	84%	+2%	+5%
Reliability of Supply	82%	-5%	-2%
Water Pressure	73%	-1%	-7%

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

Trust is relatively high but there is an opportunity to improve brand momentum.

Total Base Size: 828 and South Staffs and Cambridge Water Base Size: 51



# South Staffs Water and Cambridge Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

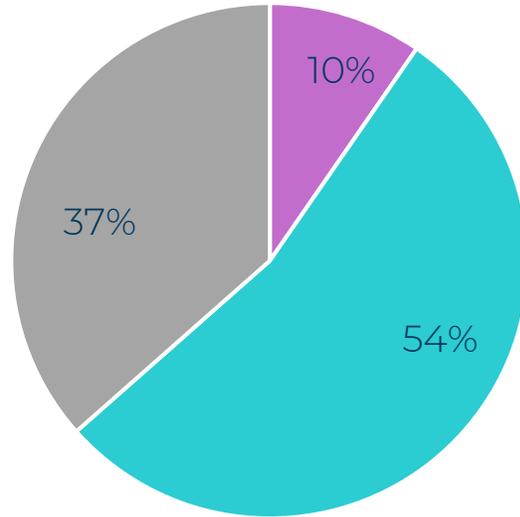
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

### Select the 3 most important themes

1. Value for money and rising bills - 58%
2. Reliability of water supply and pressure – 50%
3. Quality of drinking water – 46%

When asked to select the single most important topic, value for money and rising bills was most selected at 27%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (54%) are just looking at the charges on their bill, with 37% stating that they read the whole thing.

How charges are calculated (48%) and meter readings/estimated usage (25%) were viewed as the most unclear parts of community member bills. 31% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	48%
Meter readings / estimated usage	25%
Standing charges	21%
Differences between water and wastewater charges	-
Comparison with previous bills	14%
Help or contact information	8%
Other	8%
<b>None – my bill is clear</b>	<b>31%</b>

Opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.

Total Base Size: 828 and South Staffs and Cambridge Water Base Size: 51



# South Staffs Water and Cambridge Water: Spotlight findings

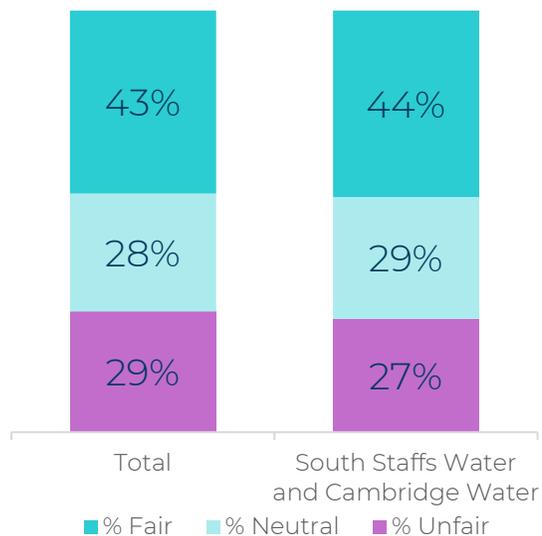
Billing and value for money



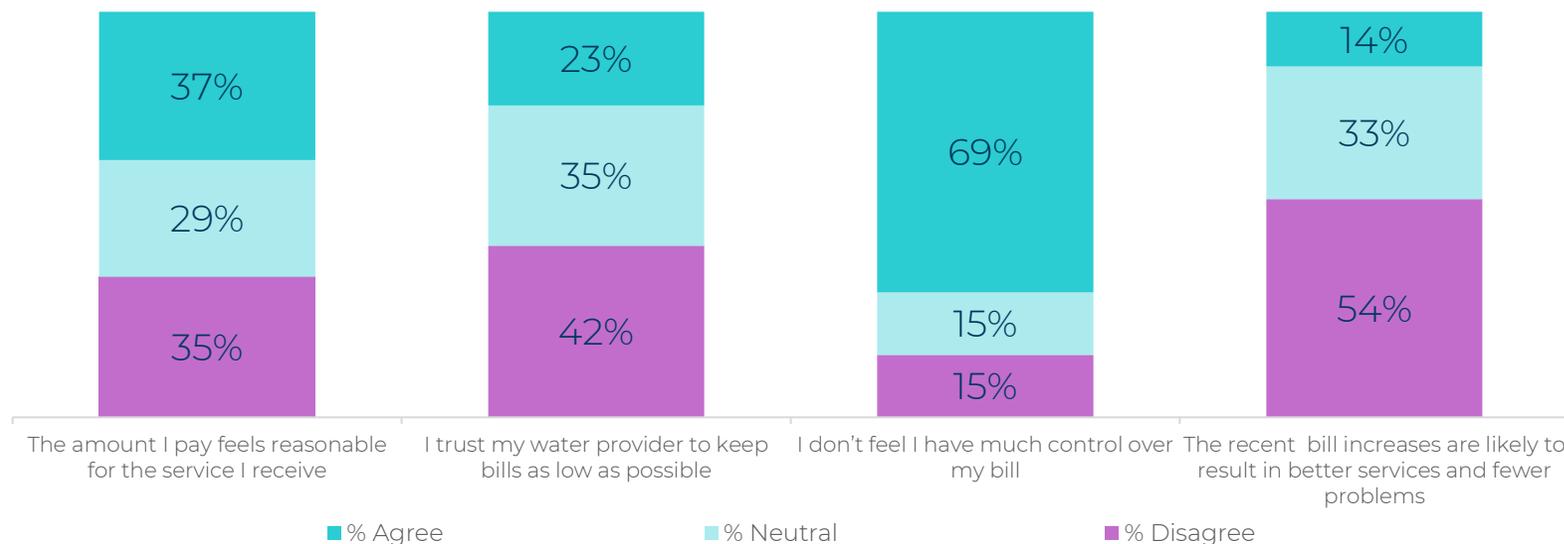
The voice for water consumers  
Llais defnyddwyr dŵr

44% of the community felt that the charges they pay are fair. 37% feel that the amount they pay feels reasonable for the service. Just 23% trust their water provider to keep bills as low as possible and 14% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Opportunities to demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

Total Base Size: 828 and South Staffs and Cambridge Water Base Size: 51



# South Staffs Water and Cambridge Water:

## Spotlight findings

What could South Staffs Water and Cambridge Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“List what they have done to keep the price of water down. Tell people about major works that have an impact on bills and how it will reduce costs in the future.”*

54, Live with family,  
Cambridge Water

*“Provide more updates and give people access to statistics regarding clean water in our homes and local waterspaces”*

36, Live with partner,  
South Staffs Water

*“Provide customers with information on how they are using the recent price hikes to improve their service and sustainability, and whether it is going towards improving the quality of our rivers.”*

22, Live with  
friends/housemates,  
Cambridge Water

*“Offer a single household rate on standard charges as I would not be using as much as a family on a standard charge.”*

38, Live alone,  
South Staffs Water



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice

## Barometer and Spotlight Report

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

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

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

Community population



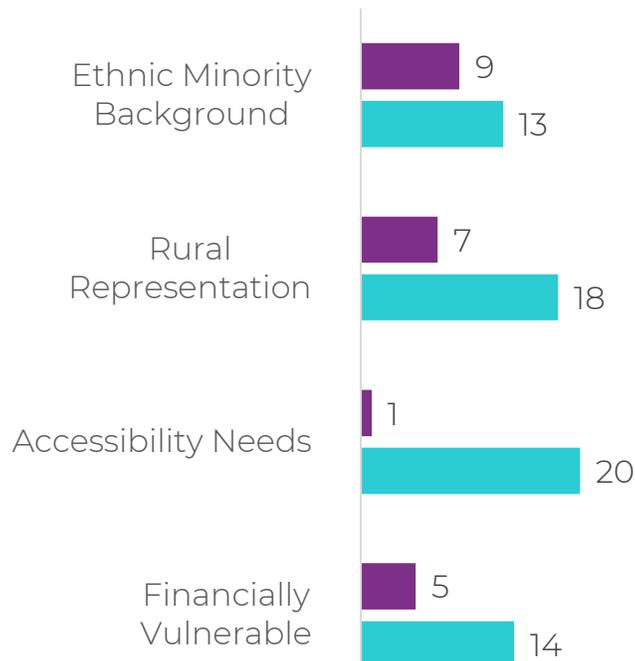
The voice for water consumers  
Llais defnyddwyr dŵr

South West Water community members: 15

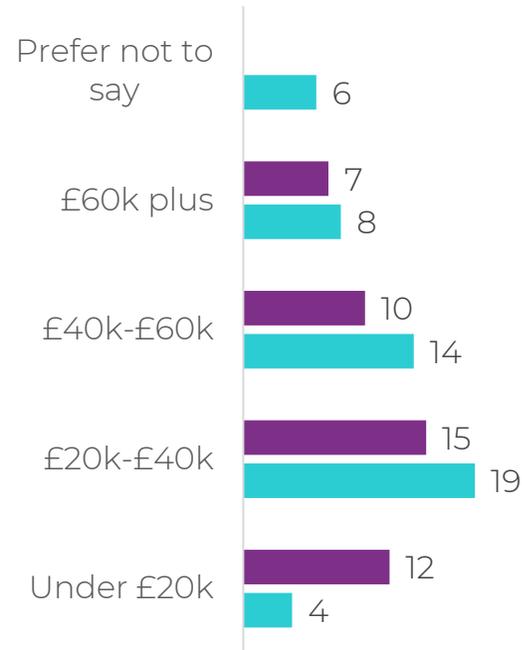
Bristol Water community members: 31

Bournemouth Water community members: 5

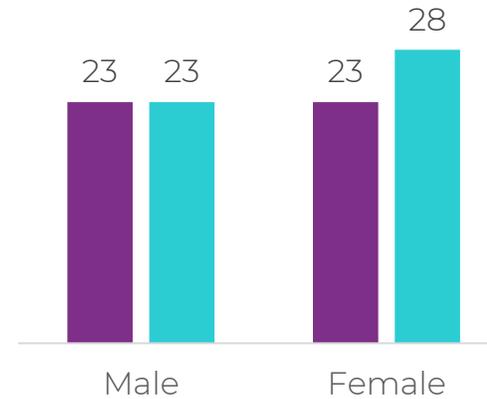
## Inclusivity



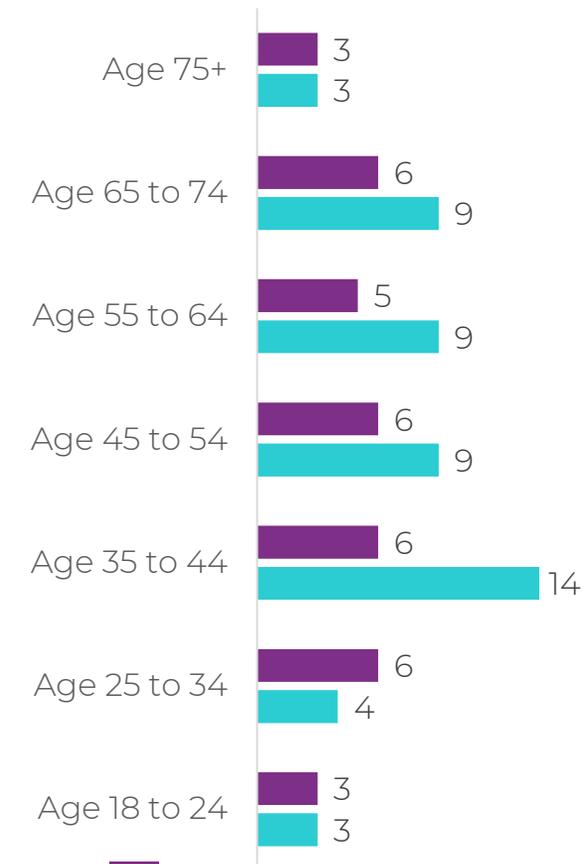
## Household income



## Gender



## Age



current sample (teal) minimum sample (purple)

Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently topping up with South West Water community members 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	Jan 2026 South West Water including Bristol Water and Bournemouth Water community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % South West Water including Bristol Water and Bournemouth Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	20%	-3%	26%	-7%
Recent Experience (Positive recent experience)	39%	+3%	42%	-2%
General outlook (Positive outlook)	53%	+18%	47%	+6%
Communication (Fair/good communication)	33%	+5%	35%	-1%
Brand Connection (someone I'd really like and have a lot in common with)	33%	+11%	29%	+4%
Brand Momentum (salience) (on its way up/has a lot going for it)	24%	+8%	23%	+1%
Trust (a great deal/some trust)	47%	0%	48%	-1%
Past 4 Week Interaction	26%	-4%	45%	-19%
Past 4 Week Disruption	6%	+4%	9%	-3%
Past 4 Week Water Quality Issues	6%	-3%	9%	-3%
<b>Overall Value for Money</b>	49%	+14%	45%	+4%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	59%	+8%	58%	+1%
Colour and Appearance	82%	+3%	84%	-1%
Taste and Smell	78%	-4%	78%	0%
Safety of Drinking Water	73%	-3%	79%	-7%
Reliability of Supply	82%	-4%	85%	-2%
Water Pressure	75%	+3%	79%	-5%
<b>South West and Isles of Scilly Only</b>				
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	47%	-6%	57%	-10%
Reducing smells from sewage treatment works	33%	0%	39%	-6%
Maintenance of sewerage pipes and treatment works	27%	-2%	41%	-15%
Cleaning wastewater properly before release back into environment	20%	+1%	36%	-16%
Minimising sewer flooding	20%	+1%	38%	-18%
Past 4 Week Sewerage issues	7%	+7%	4%	+3%

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.  
 Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and South West  
 including Bristol and Bournemouth Water  
 Base Size: 51

# Executive summary

## Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



### Barometer

- There is an opportunity to address some poorer perceptions of value for money.
- Opportunities to communicate what South West Water is doing when it comes to improving rivers and creating a greener future.



### Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.
- Opportunities to demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

**As a customer, overall, how satisfied are you with South West Water (inc. Bristol Water and Bournemouth Water)?**

**6.39/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is mixed, with many people reporting reliable water supply and decent service, but frustration about very high bills, sewage discharges and pollution, poor communication, and a perception that shareholders are prioritised over community members and the environment.



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



# South West Water (inc. Bristol Water and Bournemouth Water): Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr

59% are satisfied overall

14% are not satisfied

Overall satisfaction - water



49% are satisfied with value for money

28% are not satisfied

Overall value for money satisfaction



Whilst satisfaction is in line with the industry average, dissatisfaction with value for money is higher overall.

## Why have you given this overall satisfaction score?

*"SWW are awful. No respect for customers, incorrect billing, pollution and dangerous viruses in the pipeline taking far too long to be fixed."*

*Female, 44, Live with partner, 0/10 satisfaction score, South West Water*

*"No real problems to speak of, haven't got anything to complain about - getting the service I expect from them."*

*Male, 41, Live alone, 10/10 satisfaction score, Bristol Water*

*"I don't feel like they do anything for me personally or my community."*

*Female, 31, Live with family, 5/10 satisfaction score, South West Water*

There is an opportunity to address some poorer perceptions of value for money.

Total Base Size: 828  
South West Water Base Size: 51



# South West Water (inc. Bristol Water and Bournemouth Water): Barometer findings

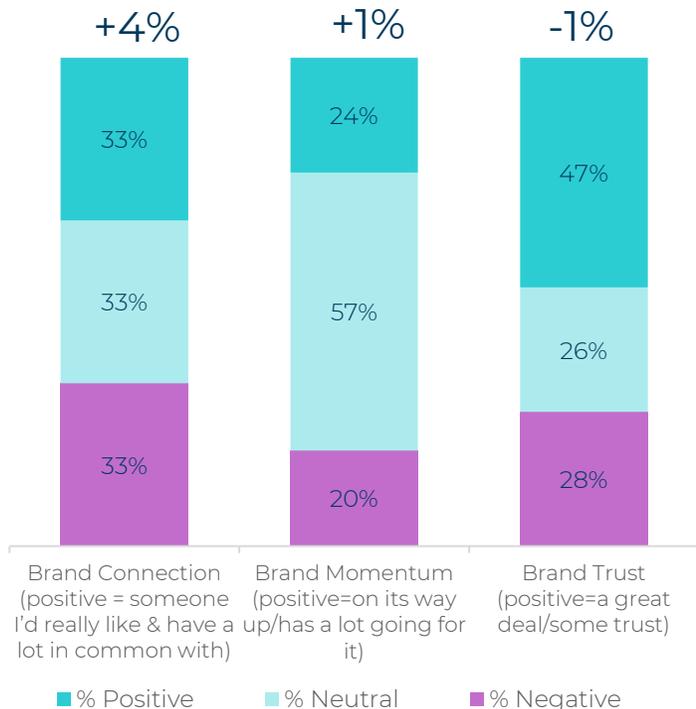
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that South West Water (inc. Bristol Water and Bournemouth Water)...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	39%	-7%	-7%
Improves our rivers	18%	+4%	-8%
Creates a greener future	18%	-3%	-11%
Spends community members' money wisely	24%	+5%	-1%
Contributes to our communities	26%	-4%	-7%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	59%	+8%	+1%
Colour and Appearance	82%	+3%	-1%
Taste and Smell	78%	-4%	0%
Safety of Drinking Water	73%	-3%	-7%
Reliability of Supply	82%	-4%	-2%
Water Pressure	75%	+3%	-5%
<b>Sewerage (South West and Isles of Scilly Only)</b>			
Overall Satisfaction	47%	-6%	-10%
Reducing smells from sewage treatment works	33%	0%	-6%
Maintenance of sewerage pipes and treatment works	27%	-2%	-15%
Cleaning wastewater properly before release back into environment	20%	+1%	-16%
Minimising sewer flooding	20%	+1%	-18%

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

Opportunities to communicate what South West Water is doing when it comes to improving rivers and creating a greener future.

Total Base Size: 828  
South West Water Base Size: 51



# South West Water (inc. Bristol Water and Bournemouth Water): Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

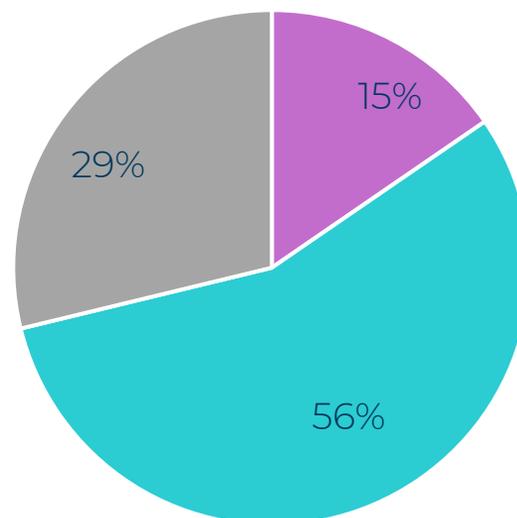
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 64%
2. Value for money and rising bills - 44%
3. Quality of drinking water - 42%

When asked to select the single most important topic, reducing pollution and protecting rivers, seas, and the environment at 35%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (56%) are just looking at the charges on their bill, with 29% stating that they read the whole thing.

How charges are calculated (44%) and meter readings/estimated usage (23%) were viewed as the most unclear parts of community member bills. 39% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	44%
Meter readings / estimated usage	23%
Standing charges	15%
Differences between water and wastewater charges	19%
Comparison with previous bills	6%
Help or contact information	6%
Other	6%
<b>None – my bill is clear</b>	<b>39%</b>

There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.

Total Base Size: 828  
South West Water Base Size: 51



# South West Water (inc. Bristol Water and Bournemouth Water): Spotlight findings

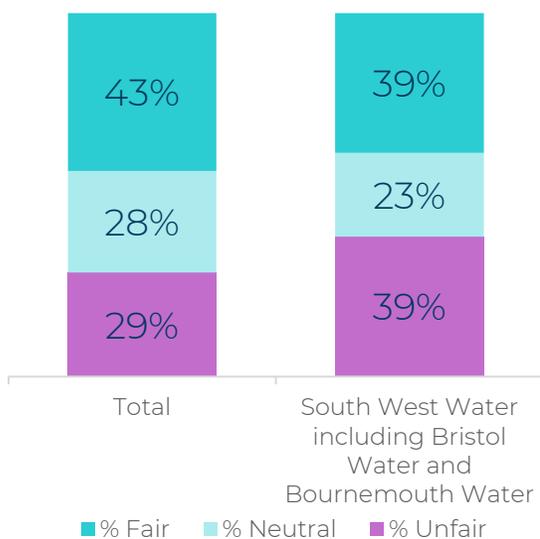
Billing and value for money



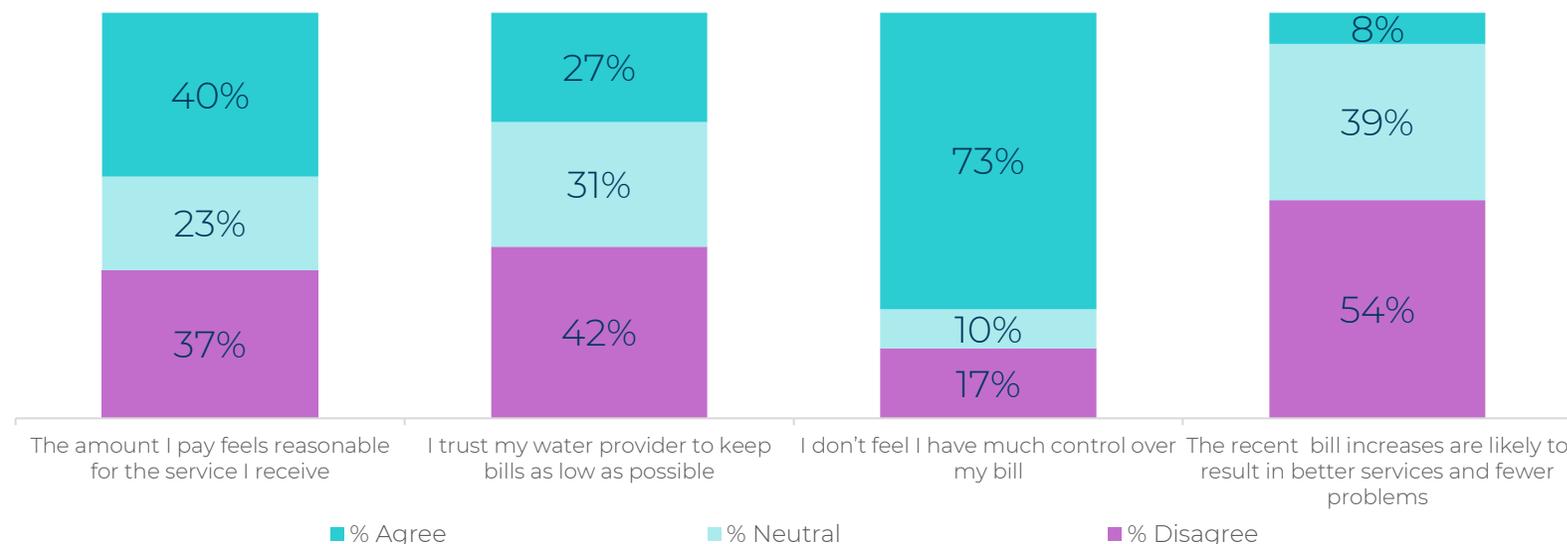
The voice for water consumers  
Llais defnyddwyr dŵr

39% of the community felt that the charges they pay are fair. 40% feel that the amount they pay feels reasonable for the service. Just 27% trust their water provider to keep bills as low as possible and 8% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Opportunities to demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

Total Base Size: 828  
South West Water Base Size: 51



# South West Water (inc. Bristol Water and Bournemouth Water): Spotlight Findings

What could South West Water (inc. Bristol Water and Bournemouth Water) do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Ensure money is spent where it's needed. We hear far too much in this country of CEOs and managing directors taking huge profits from water companies aka taxpayers money and rewarding themselves with huge pay rises it's ridiculous.”*

*50, Live with partner,  
Bristol Water*

*“Better support for low income households and disability support.”*

*33, Live with family,  
South West Water*

*“Provide testing kits and stats so we can see how clean the water is.”*

*31, Live with family,  
Bournemouth Water*

*“Break down the price increases, why its increasing, what the increase will go to that it didn't before and how much of that increase is in relation to rising costs.”*

*24, Live with family,  
South West Water*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice

# Barometer and Spotlight Report

**Southern Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# Southern Water

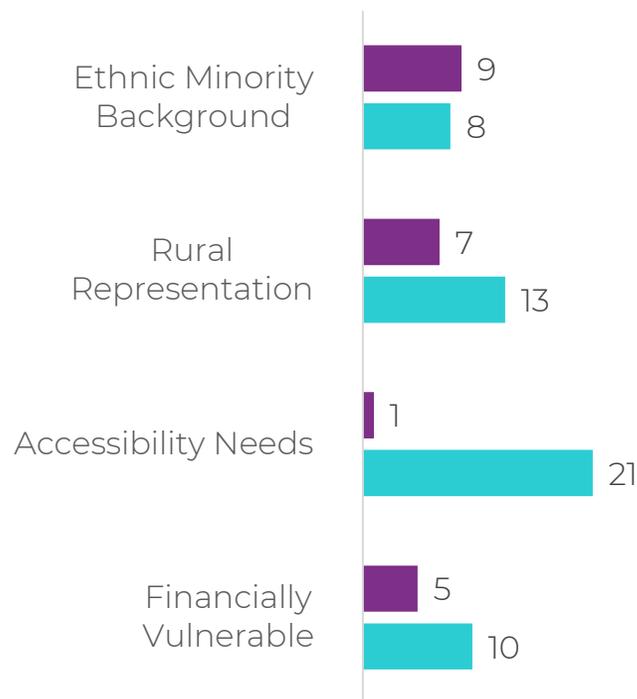
Community population



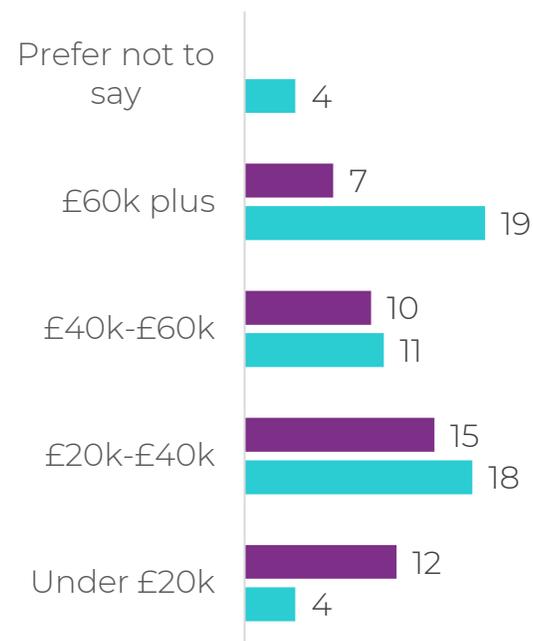
The voice for water consumers  
Llais defnyddwyr dŵr

Southern Water community members: 56

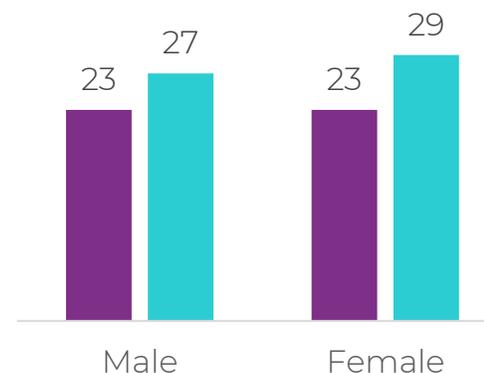
## Inclusivity



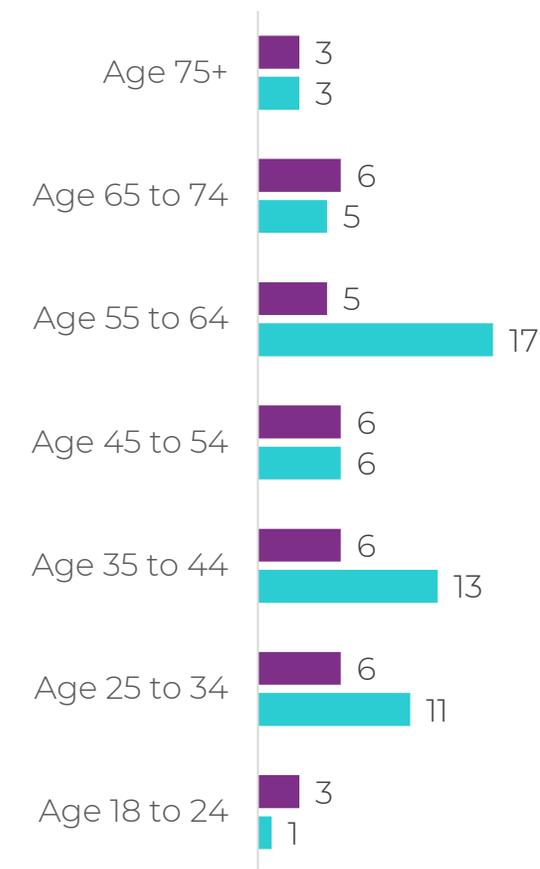
## Household income



## Gender



## Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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	Jan 2026 Southern Water community Agreement %	+/- difference % Southern Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Southern Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	14%	-10%	26%	-12%
Recent Experience (Positive recent experience)	14%	-8%	42%	-27%
General outlook (Positive outlook)	18%	-2%	47%	-29%
Communication (Fair/good communication)	27%	-3%	35%	-8%
Brand Connection (someone I'd really like and have a lot in common with)	14%	+5%	29%	-15%
Brand Momentum (salience) (on its way up/has a lot going for it)	14%	+3%	23%	-8%
Trust (a great deal/some trust)	21%	+6%	48%	-27%
Past 4 Week Interaction	68%	+11%	45%	+23%
Past 4 Week Disruption	16%	+12%	9%	+8%
Past 4 Week Water Quality Issues	11%	+9%	9%	+2%
Past 4 Week Sewerage issues	9%	+7%	4%	+5%
<b>Overall Value for Money</b>	21%	+6%	45%	-24%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	27%	+4%	58%	-31%
Colour and Appearance	84%	+1%	84%	0%
Taste and Smell	68%	+4%	78%	-10%
Safety of Drinking Water	70%	-2%	79%	-10%
Reliability of Supply	79%	-4%	85%	-6%
Water Pressure	77%	-4%	79%	-2%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	45%	+5%	57%	-12%
Reducing smells from sewage treatment works	34%	+9%	39%	-6%
Maintenance of sewerage pipes and treatment works	30%	+11%	41%	-11%
Cleaning wastewater properly before release back into environment	23%	+6%	36%	-13%
Minimising sewer flooding	25%	+8%	38%	-13%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Southern Water Base Size: 56

# Executive summary

Overview of key findings



## Barometer

- The opportunity remains to address some fundamental challenges with service provision as well as improve overall company perceptions.
- KPIs across water and sewerage are generally holding steady since wave 1 (Nov 2025) but remain well below the industry average. There is a clear opportunity to address brand perceptions across connection, momentum, and trust.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated, and provide information about meter readings/estimated usage.
- Opportunities to improve perceptions across all value for money measures. Demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

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

**4.71/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Overall sentiment is negative, with some acknowledgement that basic supply often works, but overwhelming anger about unpredictable bill increases, pollution, leaks and flooding, poor communication and transparency, and a belief that profits and executive bonuses are being prioritised over community members, communities, and the environment.



**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: 828  
Anglian Water Base Size: 51



# Southern Water: Barometer findings

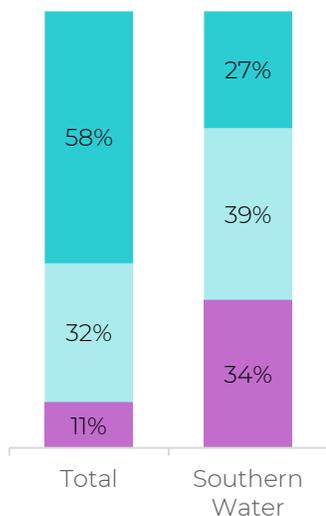


The voice for water consumers  
Llais defnyddwyr dŵr

27% are satisfied overall

34% are not satisfied

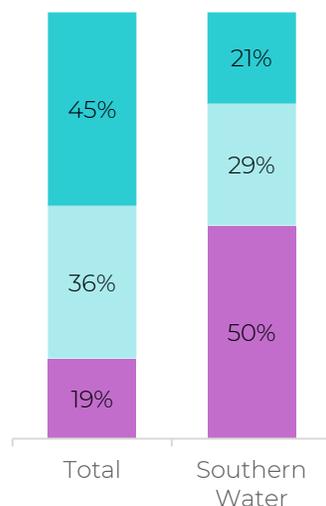
Overall satisfaction - water



21% are satisfied with value for money

50% are not satisfied

Overall value for money satisfaction



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

Satisfaction remains significantly lower than the industry average, with just 1/4 community members satisfied. 1/3 are dissatisfied. Value for money satisfaction is also lower, with 50% of community members dissatisfied and just 21% satisfied.

## Why have you given this overall satisfaction score?

*“Recent pollution events and disruption of supply.”*

*Female, 48, Live with partner, 2/10 satisfaction score*

*“I’m satisfied by certain things such as my water supply, quality and reliability. I’m dissatisfied by the price rises, lack of transparency and the pollution to our sea.”*

*Female, 29, Live with child/ren, 5/10 satisfaction score*

*“Overall I am satisfied with the service received but it would be great to be kept in the loop more with any improvements they are making.”*

*Female, 35, Live with partner, 9/10 satisfaction score*

The opportunity remains to address some fundamental challenges with service provision as well as improve overall company perceptions.

Total Base Size: 828  
Southern Water Base Size: 56



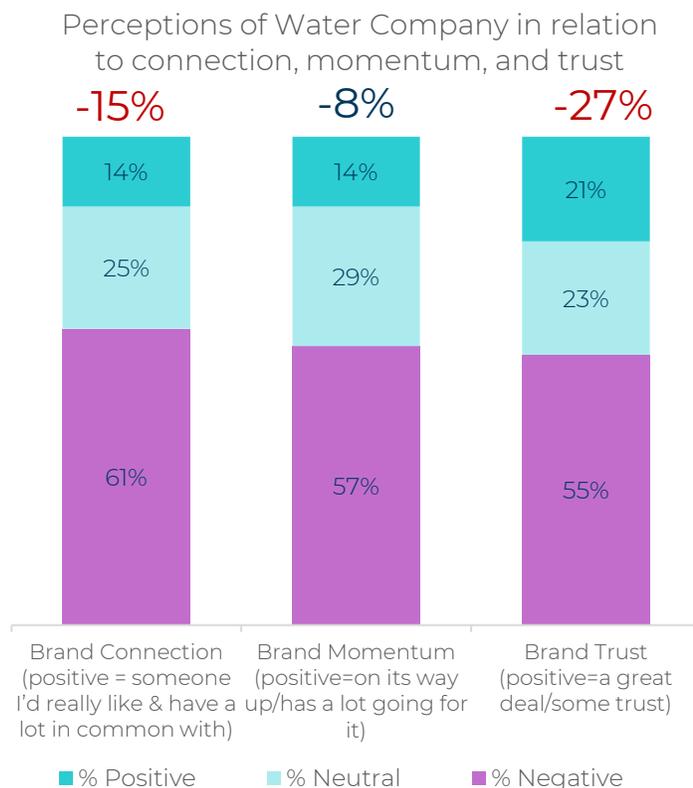
# Southern Water: Barometer findings

Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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



% Who agree that Southern Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	18%	-3%	-28%
Improves our rivers	14%	+8%	-12%
Creates a greener future	14%	+5%	-15%
Spends community members' money wisely	13%	+5%	-12%
Contributes to our communities	18%	+1%	-15%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	27%	+4%	-31%
Colour and Appearance	84%	+1%	0%
Taste and Smell	68%	+4%	-10%
Safety of Drinking Water	70%	-2%	-10%
Reliability of Supply	79%	-4%	-6%
Water Pressure	77%	-4%	-2%
<b>Sewerage</b>			
Overall Satisfaction	45%	+5%	-12%
Reducing smells from sewage treatment works	34%	+9%	-6%
Maintenance of sewerage pipes and treatment works	30%	+11%	-11%
Cleaning wastewater properly before release back into environment	23%	+6%	-13%
Minimising sewer flooding	25%	+8%	-13%

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

KPIs across water and sewerage are generally holding steady since wave 1 (Nov 2025), but remain well below the industry average. There is a clear opportunity to address brand perceptions across connection, momentum and trust.

Total Base Size: 828  
Southern Water Base Size: 56



# Southern Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

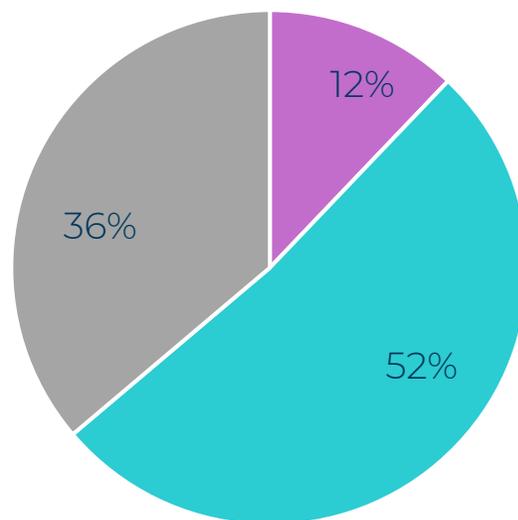
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 61%
2. Value for money and rising bills - 39%
3. Quality of drinking water - 36%

When asked to select the single most important topic, reducing pollution and protecting rivers, seas, and the environment was most selected at 29%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (52%) are just looking at the charges on their bill, with 36% stating that they read the whole thing.

How charges are calculated (43%) and meter readings/estimated usage (31%) were viewed as the most unclear parts of community member bills. 35% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	43%
Meter readings / estimated usage	31%
Standing charges	22%
Differences between water and wastewater charges	19%
Comparison with previous bills	22%
Help or contact information	5%
Other	5%
<b>None – my bill is clear</b>	<b>35%</b>

There is an opportunity to address billing clarity, particularly around how charges are calculated and provide information about meter readings/estimated usage.

Total Base Size: 828  
Southern Water Base  
Size: 56



# Southern Water: Spotlight findings

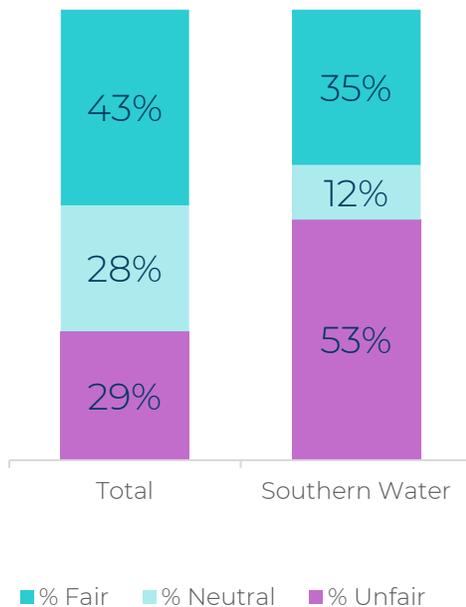
Billing and value for money



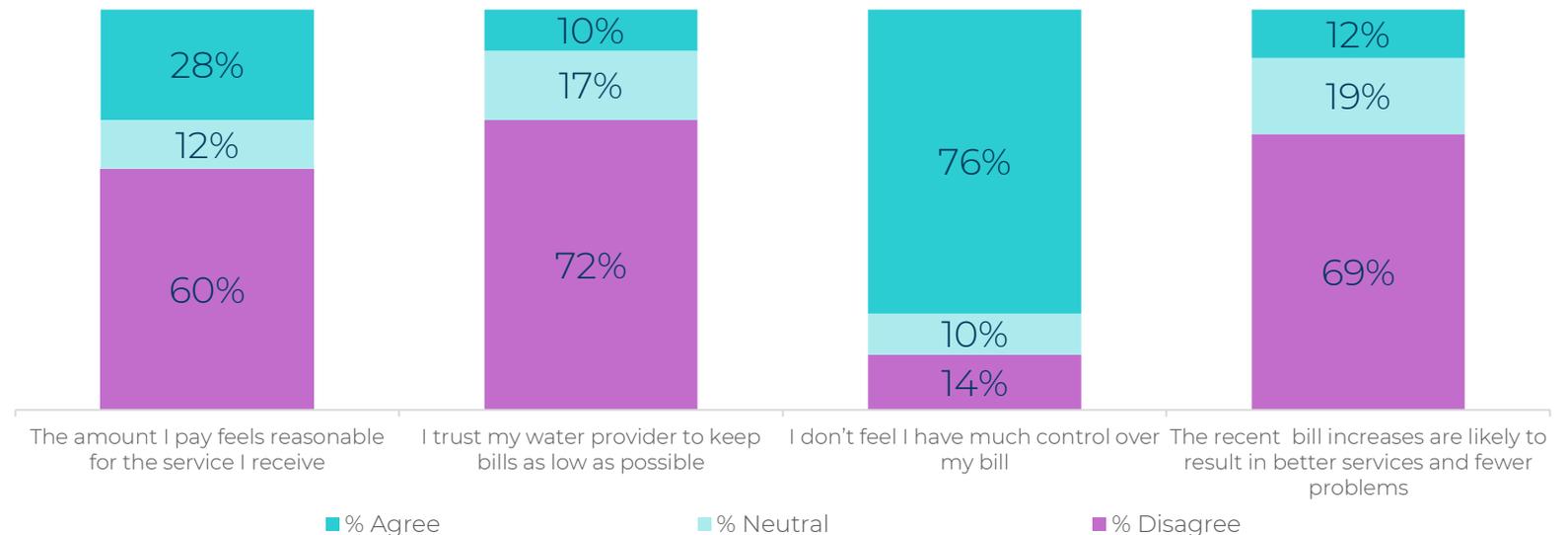
The voice for water consumers  
Llais defnyddwyr dŵr

35% of the community felt that the charges they pay are fair. 28% feel that the amount they pay feels reasonable for the service and only 10% trust their water provider to keep bills as low as possible. 12% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Opportunities to improve perceptions across all value for money measures. Demonstrate how increases in community member bills will be invested to improve service and provide insights to help community members feel more in control of their bill.

Total Base Size: 828  
Southern Water Base Size: 56



# Southern Water: Spotlight findings

What could Southern Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*"It feels eye watering expensive for a tiny one bed cottage, even with my 25% sole occupancy discount. I'd like larger homes to pay a bit more and smaller homes a bit less, i.e. redistribution of burden. Or perhaps the bill partly to be based on income (perhaps on tax band?)."*

*60, Live alone*

*"They could reduce bills and be really clear about any profit. If I was reassured there were no profits or bonuses involved and that all of my money went to water provision and providing/maintaining services, I'd be much more satisfied."*

*38, Live with family*

*"Actually do something? They don't interact with their customers at all. They don't offer money saving support, justification or empathy for bill increases etc. They should also tell us why their shareholders bonuses are so high."*

*34, Live with family*

*"Make water purer and softer (so don't need to have a softener or filtration system at home) Give majority of profits back to customers in the form of reduction on bills rather than execs. No large bonus for execs or shareholders. Be transparent about how much is spent on any bonuses."*

*38, Live with partner*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**Thames Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

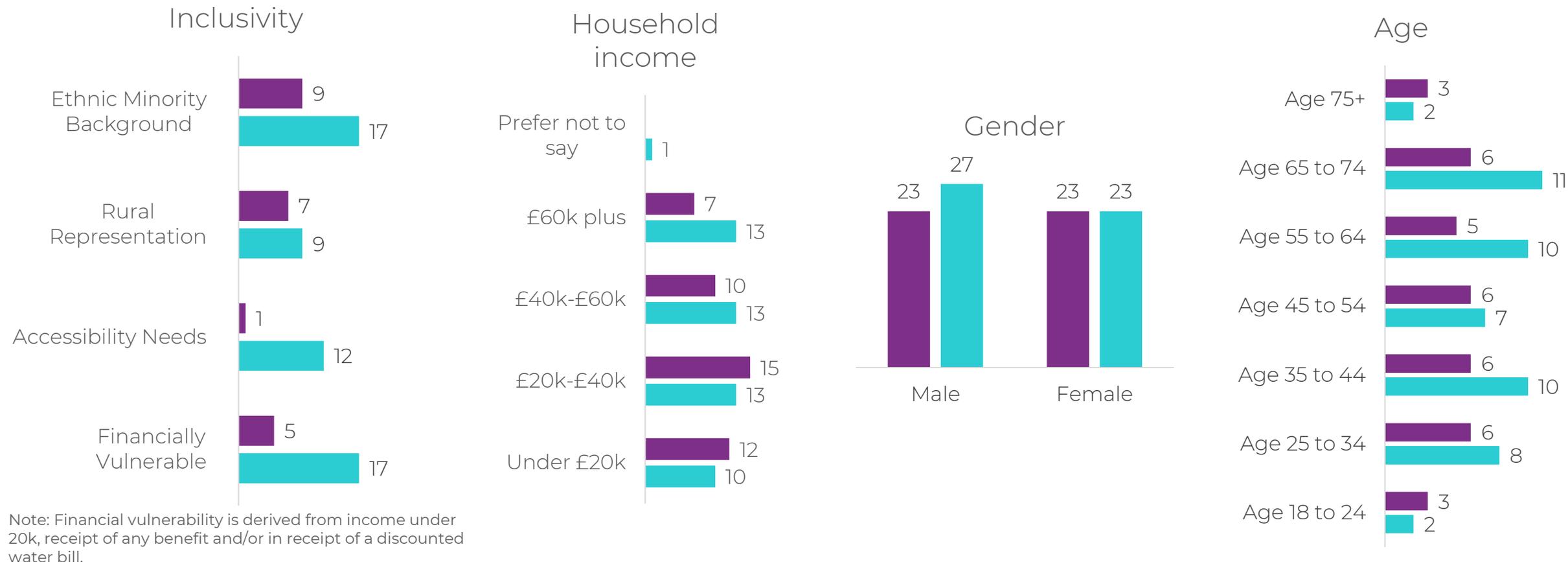
# Thames Water

## Community population



The voice for water consumers  
Llais defnyddwyr dŵr

Thames Water community members: 50



**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members is met. We are currently monitoring the quotas which are close to the minimum target to ensure we 'top up' here when replacing any drop-outs. We are also working to boost our 75+ sample by at least 1 for next month.

current sample      minimum sample

# Dashboard summary

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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Jan 2026 Thames Water community Agreement %	+/- difference % Thames Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Thames Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	18%	-7%	26%	-8%
Recent Experience (Positive recent experience)	40%	+7%	42%	-2%
General outlook (Positive outlook)	34%	+3%	47%	-13%
Communication (Fair/good communication)	26%	-7%	35%	-9%
Brand Connection (someone I'd really like and have a lot in common with)	24%	+6%	29%	-5%
Brand Momentum (salience) (on its way up/has a lot going for it)	8%	+4%	23%	-15%
Trust (a great deal/some trust)	38%	-6%	48%	-10%
Past 4 Week Interaction	38%	-4%	45%	-7%
Past 4 Week Disruption	8%	+4%	9%	-1%
Past 4 Week Water Quality Issues	6%	-3%	9%	-3%
Past 4 Week Sewerage issues	8%	+8%	4%	4%
<b>Overall Value for Money</b>	40%	+7%	45%	-5%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	50%	+12%	58%	-8%
Colour and Appearance	76%	+3%	84%	-8%
Taste and Smell	68%	+6%	78%	-10%
Safety of Drinking Water	72%	+10%	79%	-7%
Reliability of Supply	76%	-8%	85%	-9%
Water Pressure	68%	-5%	79%	-11%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	50%	-1%	57%	-7%
Reducing smells from sewage treatment works	26%	-7%	39%	-13%
Maintenance of sewerage pipes and treatment works	34%	-13%	41%	-7%
Cleaning wastewater properly before release back into environment	32%	-6%	36%	-4%
Minimising sewer flooding	30%	-3%	38%	-8%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Thames Water Base Size: 50

# Executive summary

Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- There is an opportunity to improve communication around investment and leverage/learn from positive customer service experiences.
- Overall trust has decreased since the first wave and there are opportunities to address this alongside brand momentum.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.
- There is a clear opportunity to communicate how bill increases are being used to create better services for community members.

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

**5.80/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Many experience a reliable water supply and helpful customer service when needed, but this is heavily undermined by anger over high and rising bills, poor transparency, frequent leaks and roadworks, concerns about environmental impact, and a loss of trust in how Thames Water is run and how money is spent.



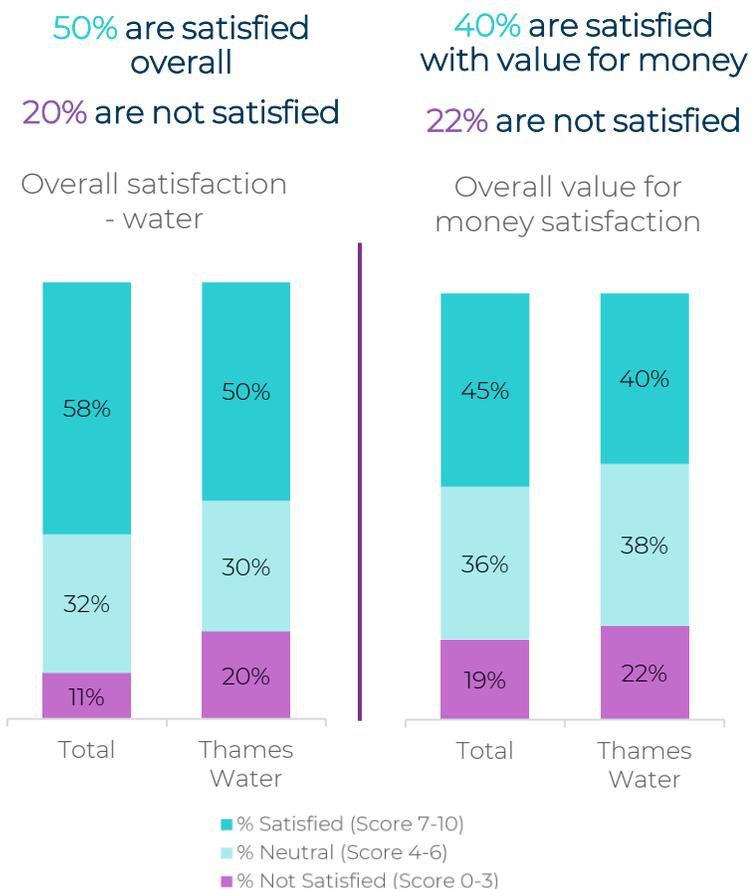
**Accountability call out:** There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



# Thames Water: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr



50% of community members are satisfied overall, however 20% state that they are not satisfied. 40% are satisfied with value for money, but 22% are not. Community members reference positive customer service experiences, but limited communication about investment is causing frustration when bills increase.

## Why have you given this overall satisfaction score?

*"They have been quite helpful to me when I've experienced financial difficulties and I am very grateful for that."*

*Female, 55, Live with child/ren  
8/10 satisfaction score*

*"Whenever I have needed them they've been brilliant. I still feel they could communicate better what they do for the community and how your money and increased bills are spent."*

*Female, 30, Live with family, 7/10 satisfaction score*

*"Bills are too high, they don't do enough to explain how they are improving the pipe network."*

*Female, 42, Live with family,  
2/10 satisfaction score*

There is an opportunity to improve communication around investment and leverage/learn from positive customer service experiences.

Total Base Size: 828  
Thames Water Base Size: 50



# Thames Water: Barometer findings

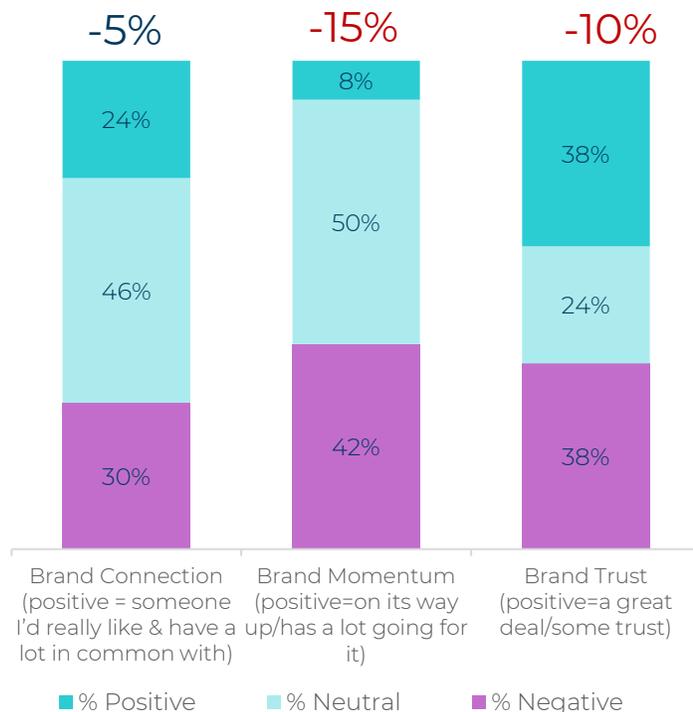
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Thames Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	30%	-10%	-16%
Improves our rivers	18%	-4%	8%
Creates a greener future	20%	+2%	-9%
Spends community members' money wisely	16%	-2%	-9%
Contributes to our communities	34%	+14%	+1%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	50%	+12%	-8%
Colour and Appearance	76%	+3%	-8%
Taste and Smell	68%	+6%	-10%
Safety of Drinking Water	72%	+10%	-7%
Reliability of Supply	76%	-8%	-9%
Water Pressure	68%	-5%	-11%
<b>Sewerage</b>			
Overall Satisfaction	50%	-1%	-7%
Reducing smells from sewage treatment works	26%	-7%	-13%
Maintenance of sewerage pipes and treatment works	34%	-13%	-7%
Cleaning wastewater properly before release back into environment	32%	-6%	-4%
Minimising sewer flooding	30%	-3%	-8%

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

Overall trust has decreased since the first wave and there are opportunities to address this, alongside brand momentum.

Total Base Size: 828  
Thames Water Base Size: 50



# Thames Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

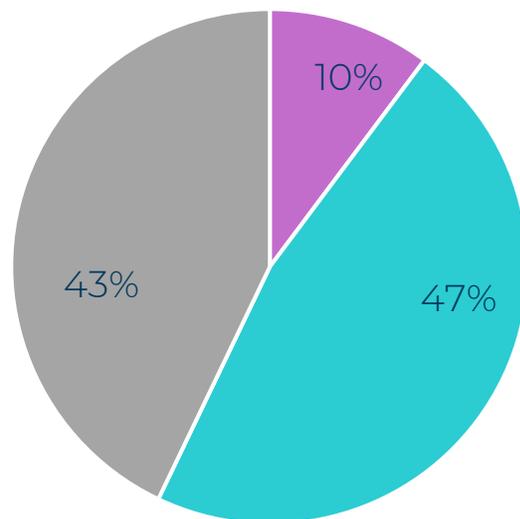
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

## Select the 3 most important themes

1. Value for money and rising bills - 54%
2. Reducing pollution and protecting rivers, seas, and the environment - 48%
3. Quality of drinking water - 48%

When asked to select the single most important topic, value for money and rising bills was most selected at 21%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

Most (47%) are just looking at the charges on their bill, with 43% stating that they read the whole thing.

How charges are calculated (41%) and differences between water and wastewater charges (33%) were viewed as the most unclear parts of community member bills. 35% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	41%
Meter readings / estimated usage	29%
Standing charges	27%
Differences between water and wastewater charges	33%
Comparison with previous bills	20%
Help or contact information	10%
Other	6%
<b>None – my bill is clear</b>	<b>35%</b>

There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.

Total Base Size: 828  
Thames Water Base Size: 50



# Thames Water: Spotlight findings

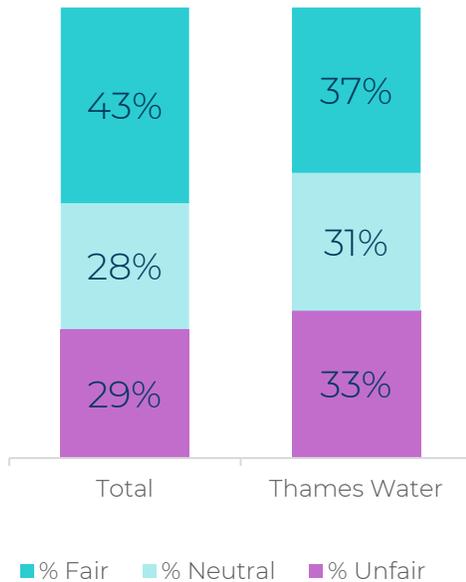
## Billing and value for money



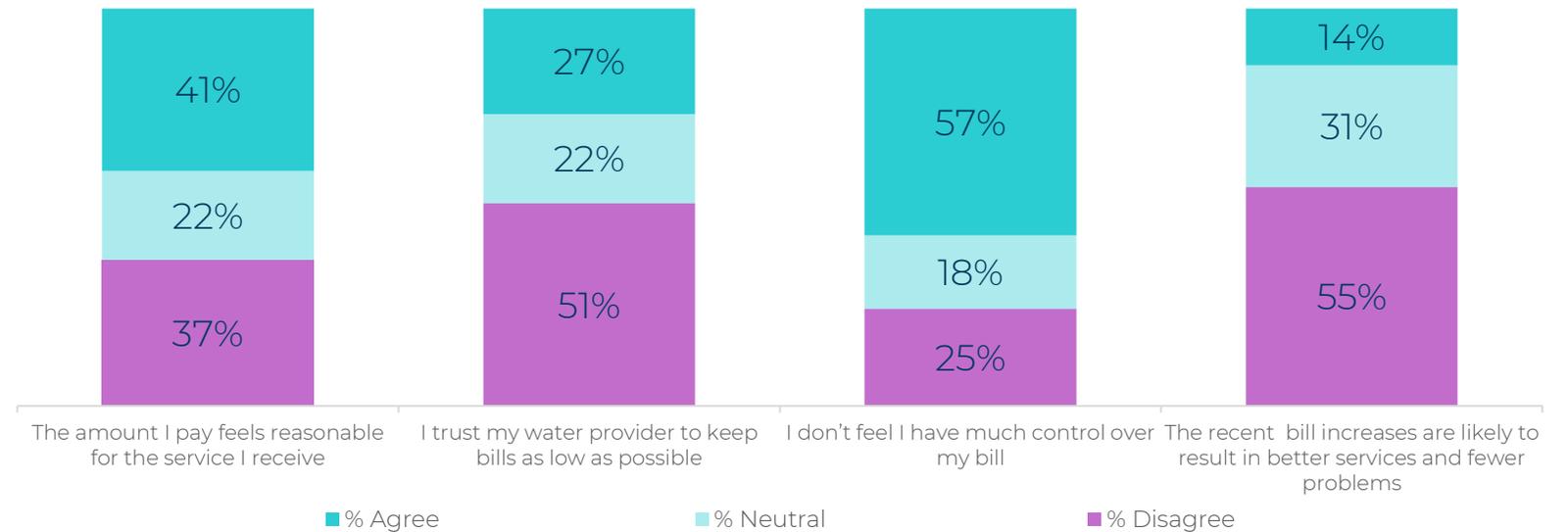
The voice for water consumers  
Llais defnyddwyr dŵr

37% feel that the charges they pay are fair, this is slightly below industry average. 41% felt that the amount they pay feels reasonable for the service they receive. 27% trust their water provider to keep bills as low as possible, but 57% don't feel they have much control over their bill (this is lower than industry average). 14% felt the recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



There is a clear opportunity to communicate how bill increases are being used to create better services for community members.

Total Base Size: 828  
Thames Water Base Size: 50



# Thames Water: Spotlight findings

What could Thames Water do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Be more transparent about the level of company debt and the role of consumers in funding the repayments on this.”*

*65, Live with partner*

*“Every Household should have a mandatory Water Meter Installed - No excuses. This would result in me feeling that I'm really getting value for money on my specific supply rather than contributing towards heavier (usually non-Water Meter Household) Bills. I say this because Households that use excessive Water do not want to be metered as it will cost them more!”*

*56, Live alone*

*“Prevent pollution, stop dumping untreated waste into waterways and the sea, cut executive salaries, prioritise customers and not shareholders.”*

*62, Live alone*

*“Explain what I am paying for, how much do things like sewage treatment cost. A breakdown like you get for council tax would be helpful.”*

*42, Live with family*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**United Utilities**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# United Utilities

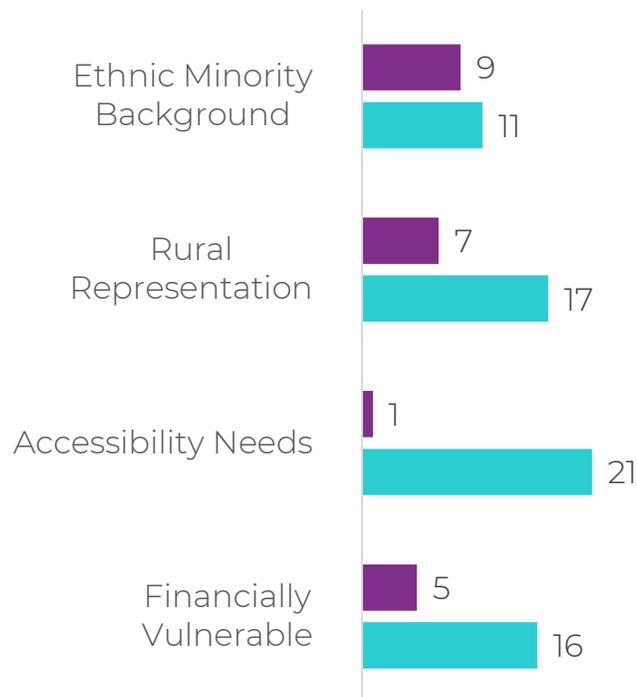
Community population



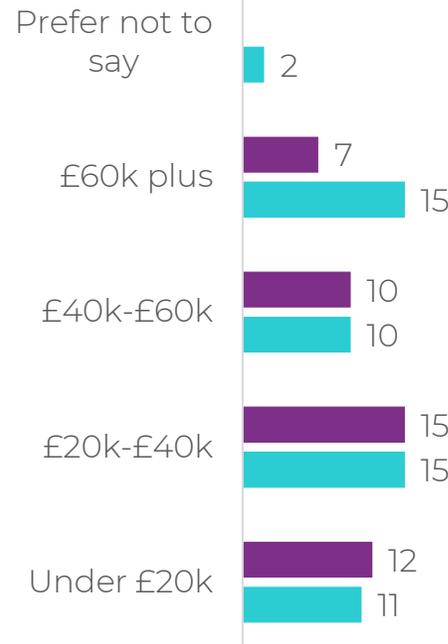
The voice for water consumers  
Llais defnyddwyr dŵr

United Utilities community members: 53

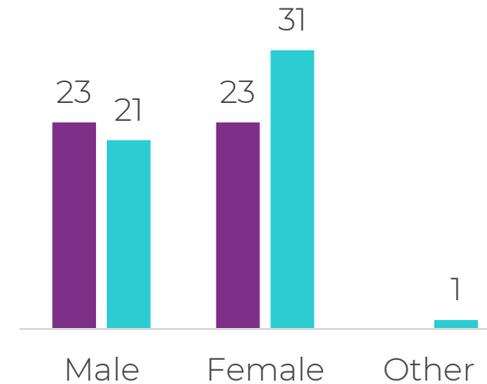
## Inclusivity



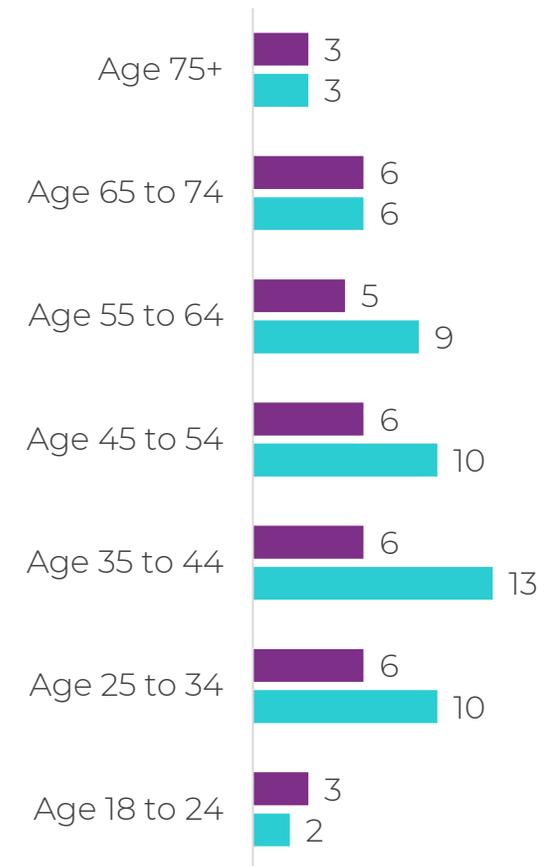
## Household income



## Gender



## Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Jan 2026 United Utilities community Agreement %	+/- difference % United Utilities community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % United Utilities community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	28%	-7%	26%	+2%
Recent Experience (Positive recent experience)	43%	-7%	42%	+2%
General outlook (Positive outlook)	47%	-8%	47%	0%
Communication (Fair/good communication)	23%	-16%	35%	-12%
Brand Connection (someone I'd really like and have a lot in common with)	26%	+8%	29%	-3%
Brand Momentum (salience) (on its way up/has a lot going for it)	21%	-1%	23%	-2%
Trust (a great deal/some trust)	53%	+10%	48%	+5%
Past 4 Week Interaction	36%	-3%	45%	-9%
Past 4 Week Disruption	6%	+4%	9%	-3%
Past 4 Week Water Quality Issues	10%	+6%	9%	+1%
Past 4 Week Sewerage issues	0%	-2%	4%	-4%
<b>Overall Value for Money</b>	34%	+4%	45%	-11%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	59%	+5%	58%	+1%
Colour and Appearance	83%	+3%	84%	-1%
Taste and Smell	77%	+11%	78%	-1%
Safety of Drinking Water	79%	+9%	79%	0%
Reliability of Supply	91%	+2%	85%	+6%
Water Pressure	81%	+7%	79%	+2%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	60%	+8%	57%	+3%
Reducing smells from sewage treatment works	32%	+2%	39%	-7%
Maintenance of sewerage pipes and treatment works	38%	-5%	41%	-4%
Cleaning wastewater properly before release back into environment	28%	-9%	36%	-8%
Minimising sewer flooding	34%	0%	38%	-4%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and United Utilities Base Size: 53

# Executive summary

Overview of key findings



The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- There is a clear opportunity to enhance value for money perceptions by clearly communicating how money is being spent.
- Brand perceptions remain largely consistent with previous waves, and water and sewerage metrics are typically holding steady. Opportunities to improve across some specific metrics.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.
- There is a clear opportunity to enhance value for money perceptions by communicating how bill increases are being used to fund better services.

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

**6.51/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Most community members say the water supply is reliable and clean, with quick responses when problems arise. The biggest frustration is cost. Bills feel high, unclear, and rising, with little explanation of where the money goes.



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



# United Utilities: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr

59% are satisfied overall

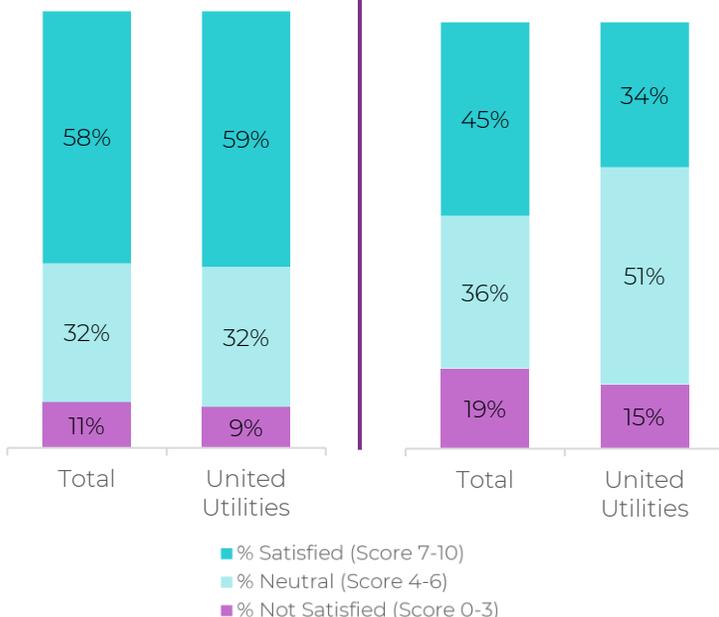
15% are not satisfied

Overall satisfaction - water

34% are satisfied with value for money

15% are not satisfied

Overall value for money satisfaction



Overall satisfaction is in line with industry average, however value for money satisfaction is a lot lower. Most community members say the water supply is reliable and generally clean, with quick responses when problems arise. The biggest frustration is cost. Bills feel high, unclear, and rising, with little explanation of where the money goes.

## Why have you given this overall satisfaction score?

*“High cost - unexplained as to why I pay that much and what it does.”*

*Female, 28, Live with partner, 3/10 satisfaction score*

*“Leak was reported on the 26th Dec and wasn't fixed until 6th January.”*

*Female, 46, Live with child/ren, 5/10 satisfaction score*

*“Clean good water, good pressure. Seem to have good adverts. Respond very quickly to any issues/problems.”*

*Male, 70, Live with partner, 10/10 satisfaction score*

There is a clear opportunity to enhance value for money perceptions through clearly communication how money is being spent.

Total Base Size: 828  
United Utilities Base Size: 53



# United Utilities: Barometer findings

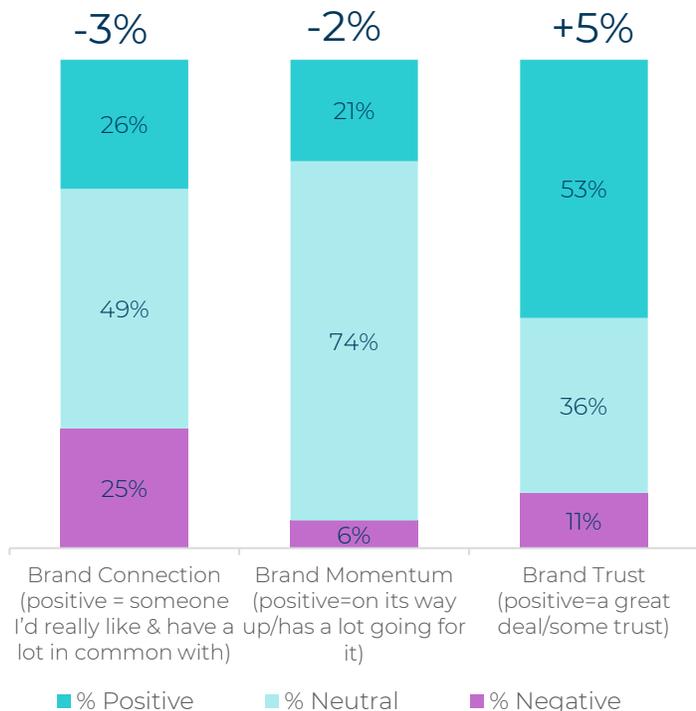
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that United Utilities...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	43%	+4%	-3%
Improves our rivers	19%	0%	-7%
Creates a greener future	21%	+2%	-8%
Spends community members' money wisely	15%	+2%	-10%
Contributes to our communities	34%	-3%	+1%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	59%	+5%	+1%
Colour and Appearance	83%	+3%	-1%
Taste and Smell	77%	+11%	-1%
Safety of Drinking Water	79%	+9%	0%
Reliability of Supply	91%	+2%	+6%
Water Pressure	81%	+7%	+2%
<b>Sewerage</b>			
Overall Satisfaction	60%	+8%	+3%
Reducing smells from sewage treatment works	32%	+2%	-7%
Maintenance of sewerage pipes and treatment works	38%	-5%	-4%
Cleaning wastewater properly before release back into environment	28%	-9%	-8%
Minimising sewer flooding	34%	0%	-4%

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

Brand perceptions remain largely consistent with previous waves and water and sewerage metrics are typically holding steady. Opportunities to improve across some specific metrics.

Total Base Size: 828  
United Utilities Base Size: 53



# United Utilities: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

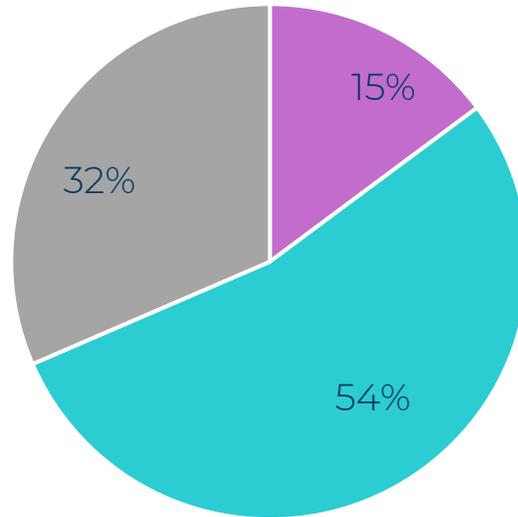
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

### Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 60%
2. Value for money and rising bills - 60%
3. Quality of drinking water - 55%

When asked to select the single most important topic, value for money and rising bills and reducing pollution were most selected both at 30%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (54%) are just looking at the charges on their bill, with 32% stating that they read the whole thing.

How charges are calculated (50%) and meter readings/estimated usage (33%) were viewed as the most unclear parts of community member bills. 28% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	50%
Meter readings / estimated usage	33%
Standing charges	19%
Differences between water and wastewater charges	13%
Comparison with previous bills	9%
Help or contact information	4%
Other	2%
None – my bill is clear	28%

There is an opportunity to address billing clarity, particularly around how charges are calculated and meter readings/estimated usage.



# United Utilities: Spotlight findings

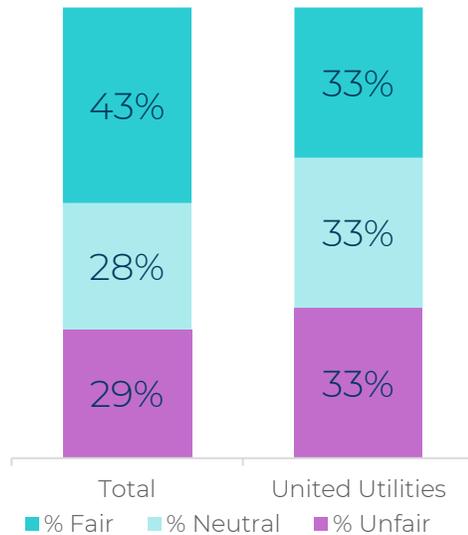
Billing and value for money



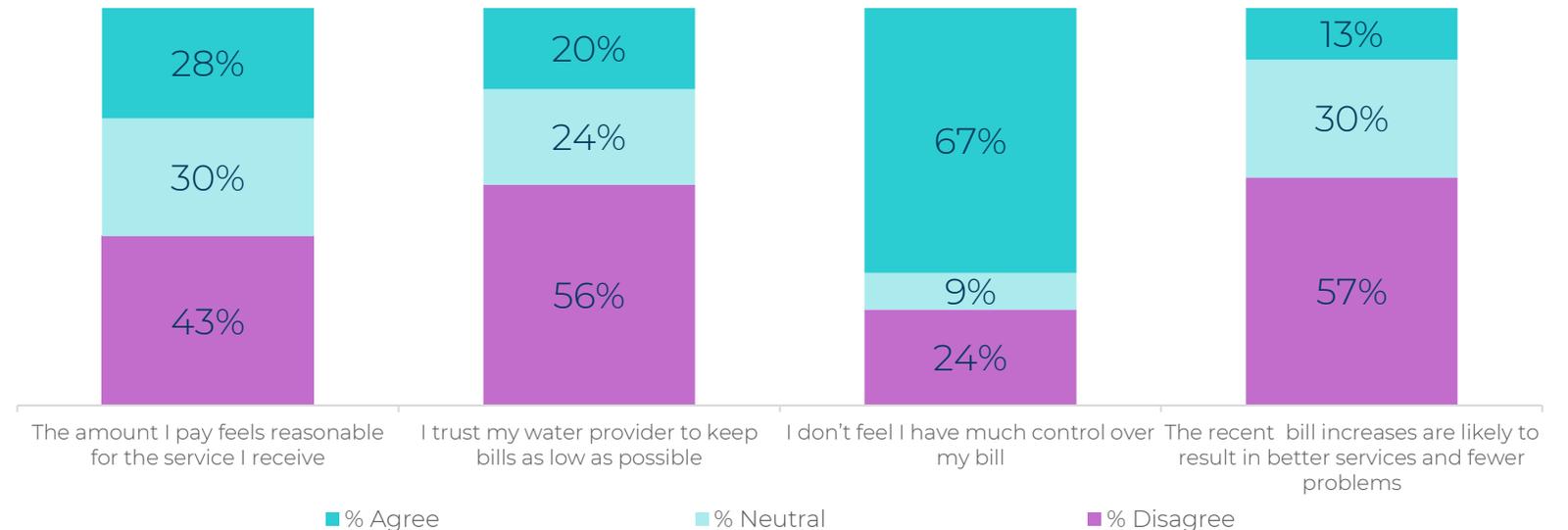
The voice for water consumers  
Llais defnyddwyr dŵr

33% feel the charges they pay are fair. Only 28% felt that the amount they pay feels reasonable for the service they receive and only 20% trust that their water provider to keep bills as low as possible. 67% feel they don't have much control other their bill and 13% feel the recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



There is a clear opportunity to enhance value for money perceptions by communicating how bill increases are being used to fund better services.

Total Base Size: 828  
United Utilities Base Size: 53



# United Utilities: Spotlight findings

What could United Utilities do to improve your value for money perceptions?



The voice for water consumers  
Llais defnyddwyr dŵr

*“Offering a scheme which offers a reduced bill for those in receipt of benefits and pensions.”*

*58, Live alone*

*“Explain what they are doing to replace aging water system and what they are doing to reduce the amount of pollution in the rivers.”*

*46, Live with family*

*“Provide a better break down of where the money is going, what projects it is being spent on the value this provides to customers.”*

*35, Live with family*

*“Update the united utilities customer app. It seems quite dated. Not very interactive.”*

*55, Live with family*



The voice for water consumers  
Llais defnyddwyr dŵr

# Water Voice Barometer and Spotlight Report

**Wessex Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

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

# Wessex Water

## Community population

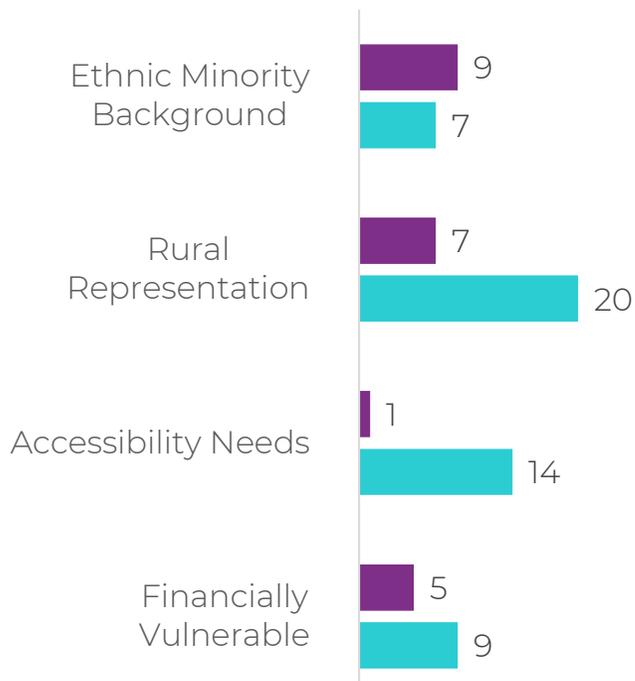
Wessex Water  
YTL GROUP



The voice for water consumers  
Llais defnyddwyr dŵr

Wessex Water community members: 49

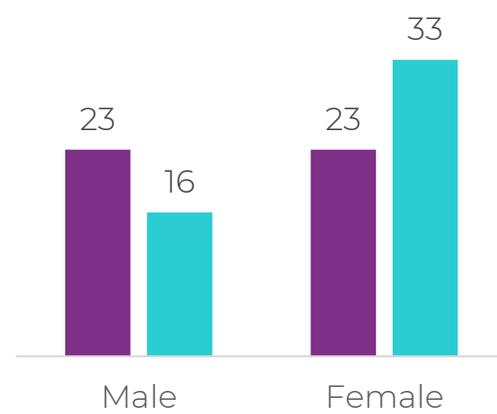
### Inclusivity



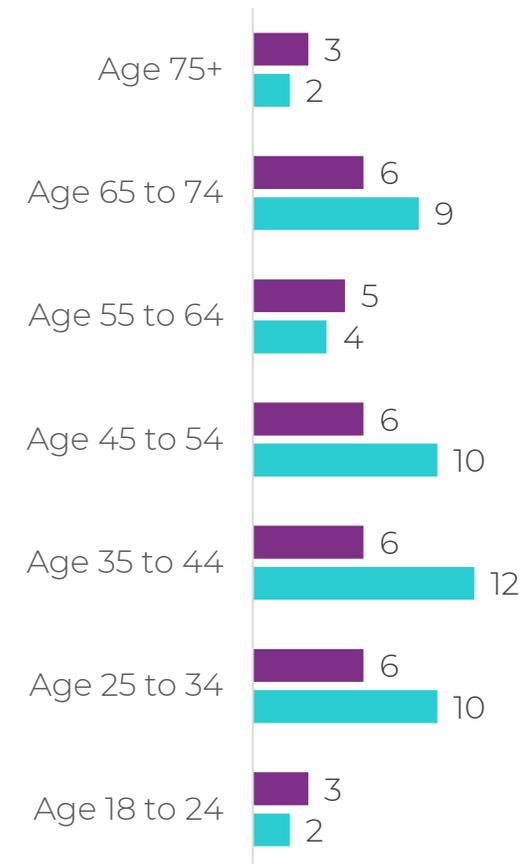
### Household income



### Gender



### Age



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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



The voice for water consumers  
 Llais defnyddwyr dŵr

Topic	Jan 2026 Wessex Water community Agreement %	+/- difference % Wessex Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Wessex Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	25%	+3%	26%	-2%
Recent Experience (Positive recent experience)	45%	-1%	42%	+3%
General outlook (Positive outlook)	35%	-9%	47%	-13%
Communication (Fair/good communication)	37%	-3%	35%	+2%
Brand Connection (someone I'd really like and have a lot in common with)	22%	-1%	29%	-7%
Brand Momentum (salience) (on its way up/has a lot going for it)	20%	+13%	23%	-2%
Trust (a great deal/some trust)	49%	+11%	48%	+1%
Past 4 Week Interaction	43%	+12%	45%	-2%
Past 4 Week Disruption	4%	-3%	9%	-5%
Past 4 Week Water Quality Issues	6%	-3%	9%	-3%
Past 4 Week Sewerage issues	2%	0%	4%	-2%
<b>Overall Value for Money</b>	45%	+9%	45%	-1%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	61%	+21%	58%	+4%
Colour and Appearance	86%	0%	84%	+2%
Taste and Smell	80%	+1%	78%	+1%
Safety of Drinking Water	80%	+1%	79%	0%
Reliability of Supply	92%	+4%	85%	+7%
Water Pressure	84%	+12%	79%	+5%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	61%	+11%	57%	+4%
Reducing smells from sewage treatment works	39%	+15%	39%	-1%
Maintenance of sewerage pipes and treatment works	49%	+23%	41%	+8%
Cleaning wastewater properly before release back into environment	37%	+20%	36%	+1%
Minimising sewer flooding	37%	+22%	38%	-1%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Wessex Water Base Size: 49

# Executive summary

Overview of key findings

Wessex Water  
YTL GROUP



CCW

The voice for water consumers  
Llais defnyddwyr dŵr



## Barometer

- More can be done to demonstrate the work being done to tackle pollution and improve value for money perceptions.
- Water and sewerage satisfaction has improved. However, more could be done to communicate what Wessex Water are doing to improve rivers and create a greener future.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.
- There is a clear opportunity to build trust by being transparent about bill increases and what services and improvements these will result in. There is also space to help community members feel more in control of their bills.

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

**6.62/10 vs 6.51/10 (Total)**

## Why do community members feel this way?

Most people say water supply is reliable and customer service is quick when needed. Frustration is mainly about pollution, rising bills, and negative press around bonuses and profits. Overall, the service works, but trust and value for money are challenges.



**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: 828 and  
Wessex Water Base Size: 49



# Wessex Water: Barometer findings



The voice for water consumers  
Llais defnyddwyr dŵr



Overall satisfaction is above industry average and value for money satisfaction is in line with industry average. Overall, community members say water supply is reliable and customer service is quick when needed. Frustration is mainly about pollution, rising bills, and negative press around bonuses and profits.

## Why have you given this overall satisfaction score?

*“Always been there if we’ve needed them. Water pressure is the strongest anywhere I’ve been.”*

*Male, 67, Live with partner, 10/10 satisfaction score*

*“I am happy with water supply etc, but the cost of water is very high.”*

*Female, 25, Live with family, 8/10 satisfaction score*

*“They need to stop polluting the rivers and South Coast with sewage outflow.”*

*Male, 66, Live with partner, 0/10 satisfaction score*

More can be done to demonstrate the work being done to tackle pollution and improve value for money perceptions.

Total Base Size: 828  
Wessex Water Base Size: 49



# Wessex Water: Barometer findings

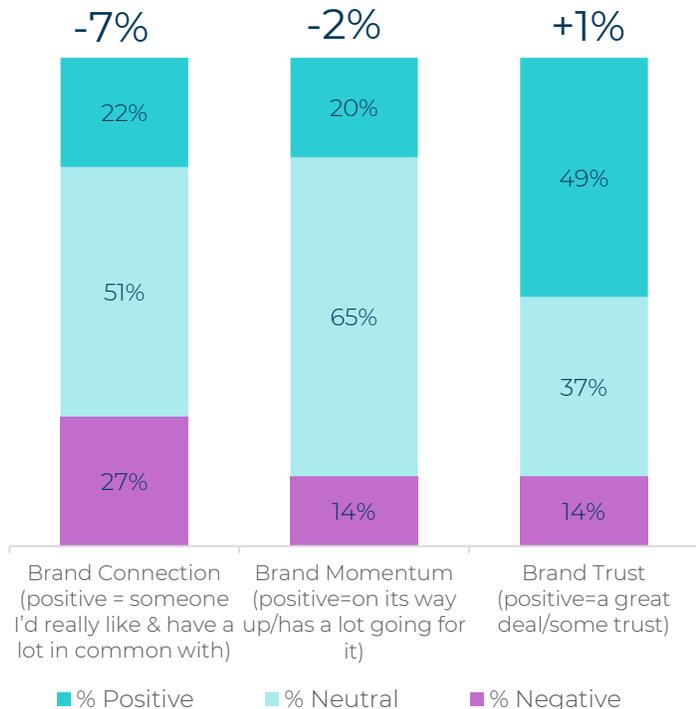
Brand perceptions and performance (satisfaction)



The voice for water consumers  
Llais defnyddwyr dŵr

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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Wessex Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	49%	+13%	+3%
Improves our rivers	12%	-5%	-14%
Creates a greener future	18%	+4%	-11%
Spends community members' money wisely	16%	+6%	-9%
Contributes to our communities	33%	+14%	0%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	61%	+21%	+4%
Colour and Appearance	86%	0%	+2%
Taste and Smell	80%	+1%	+1%
Safety of Drinking Water	80%	+1%	0%
Reliability of Supply	92%	+4%	+7%
Water Pressure	84%	+12%	+5%
<b>Sewerage</b>			
Overall Satisfaction	61%	+11%	+4%
Reducing smells from sewage treatment works	39%	+15%	-1%
Maintenance of sewerage pipes and treatment works	49%	+23%	+8%
Cleaning wastewater properly before release back into environment	37%	+20%	+1%
Minimising sewer flooding	37%	+22%	-1%

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

Water and sewerage satisfaction has improved. However, more could be done to communicate what Wessex Water are doing to improve rivers and create a greener future.

Total Base Size: 828  
Wessex Water Base Size: 49



# Wessex Water: Spotlight findings

Billing and value for money



The voice for water consumers  
Llais defnyddwyr dŵr

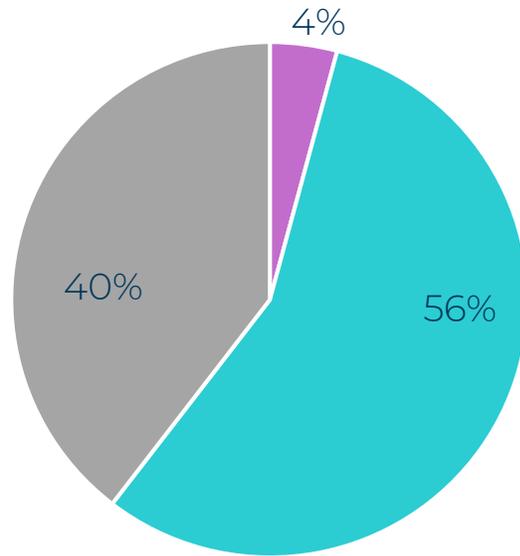
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

### Select the 3 most important themes

1. Reducing pollution and protecting rivers, seas, and the environment - 71%
2. Value for money and rising bills - 46%
3. Quality of drinking water – 38%

When asked to select the single most important topic, reducing pollution and protecting rivers, seas, and the environment was most selected at 44%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (56%) are just looking at the charges on their bill, with 40% stating that they read the whole thing.

How charges are calculated (43%) and standing charges (25%) were viewed as the most unclear parts of community member bills. 1/3 had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	31%
Standing charges	25%
Meter readings / estimated usage	17%
Comparison with previous bills	15%
Differences between water and wastewater charges	13%
Help or contact information	2%
Other	
None – my bill is clear	46%

There is an opportunity to address billing clarity, particularly around how charges are calculated and standing charges.



# Wessex Water: Spotlight findings

Billing and value for money



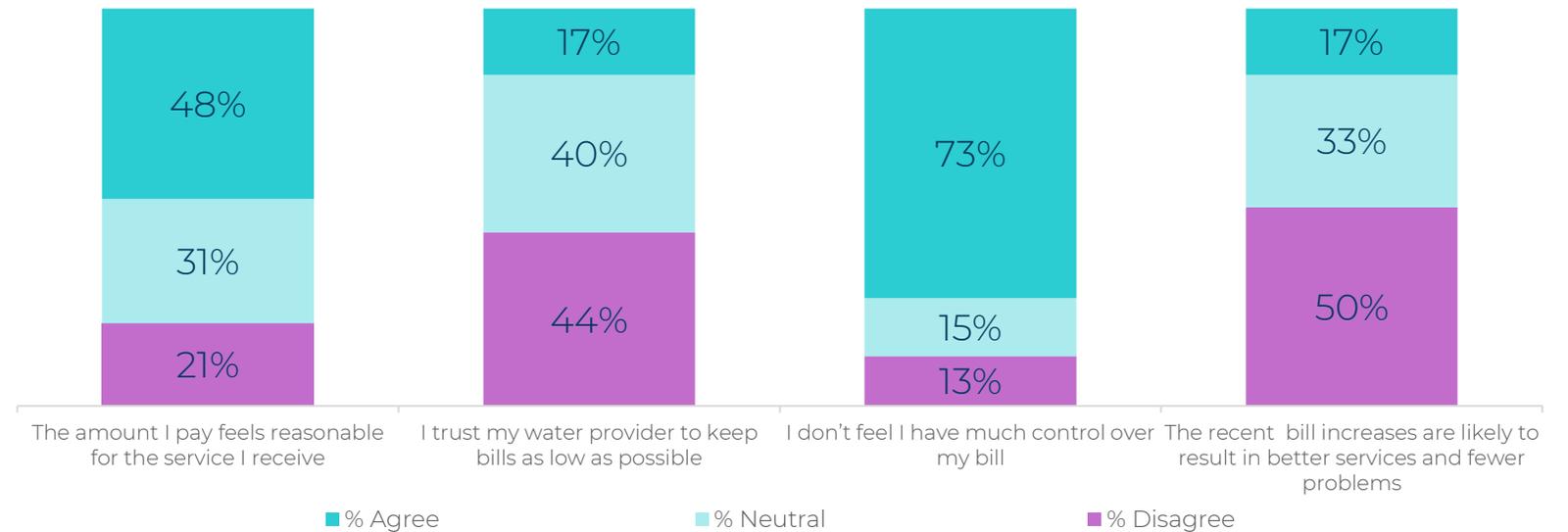
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Llais defnyddwyr dŵr

46% felt the charges they pay are fair. 48% felt the amount they pay feels reasonable for the service they receive. However, only 17% trust their water provider to keep bills as low as possible. 73% don't feel they have much control over their bill and just 17% felt recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



There is a clear opportunity to build trust by being transparent about bill increases and what services and improvements these will result in. There is also space to help community members feel more in control of their bills.

Total Base Size: 828  
Wessex Water Base Size: 49



# Wessex Water: Spotlight findings

What could Wessex Water do to improve your value for money perceptions?



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*“Ensure customers see where their bill money goes. What it goes on and how they spend it.”*

*39, Live with partner*

*“Be more honest and transparent with us rather than trying to hide behind their governance processes and also to be simpler with their communication and not complicating matters to confuse us.*

*63, Live with partner*

*“When failures have occurred and errors have been made, ensure that no, absolute no bonuses are paid and customers are refunded to justify and apologise for these failures and errors.”*

*52, Live alone*

*“Share what the bill covers. The breakdown of what percentage goes into what area of improvement/consistency etc.”*

*38, Live with family*



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# Water Voice Barometer and Spotlight Report

**Yorkshire Water**

January 2026

Delivered by Taylor McKenzie  
Research and Energy Saving  
Trust

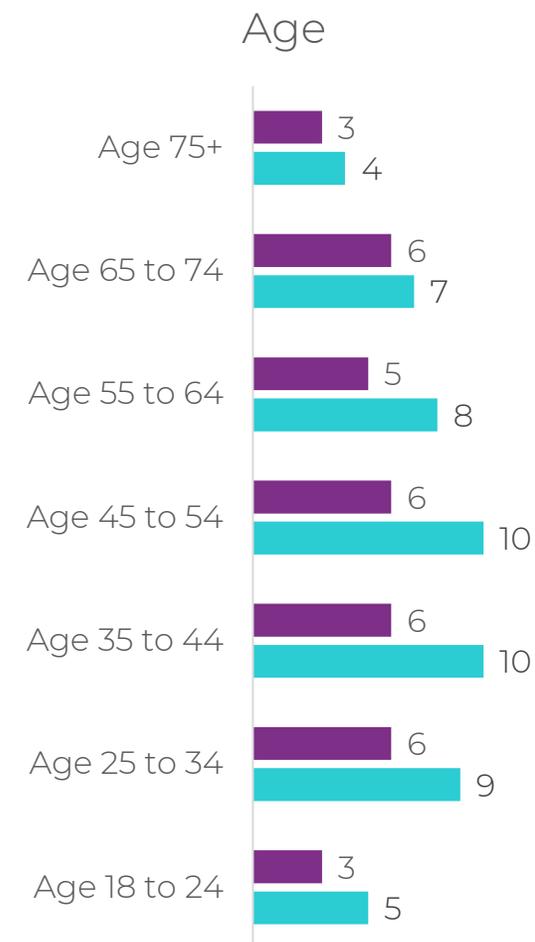
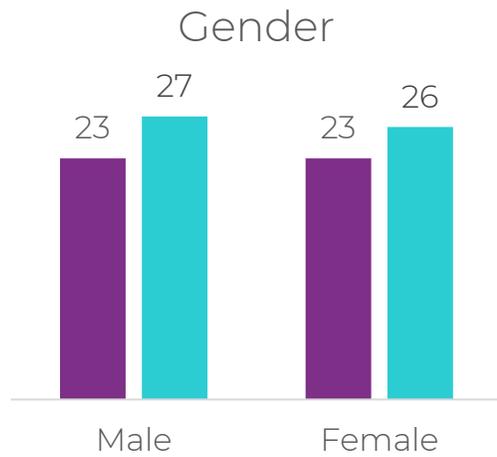
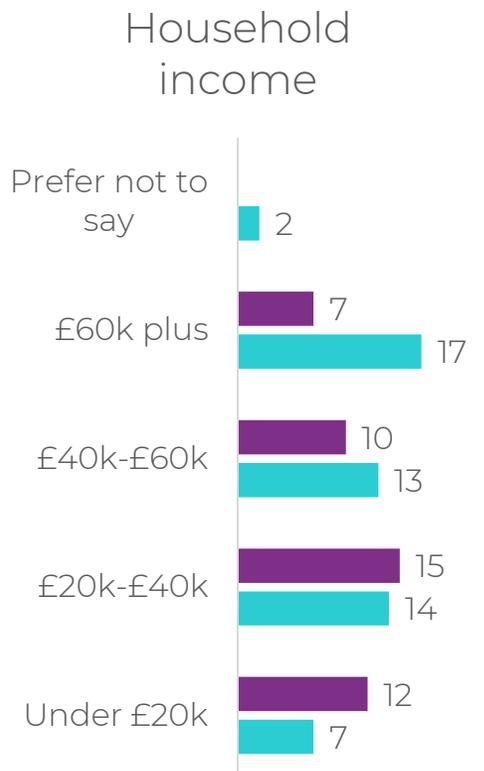
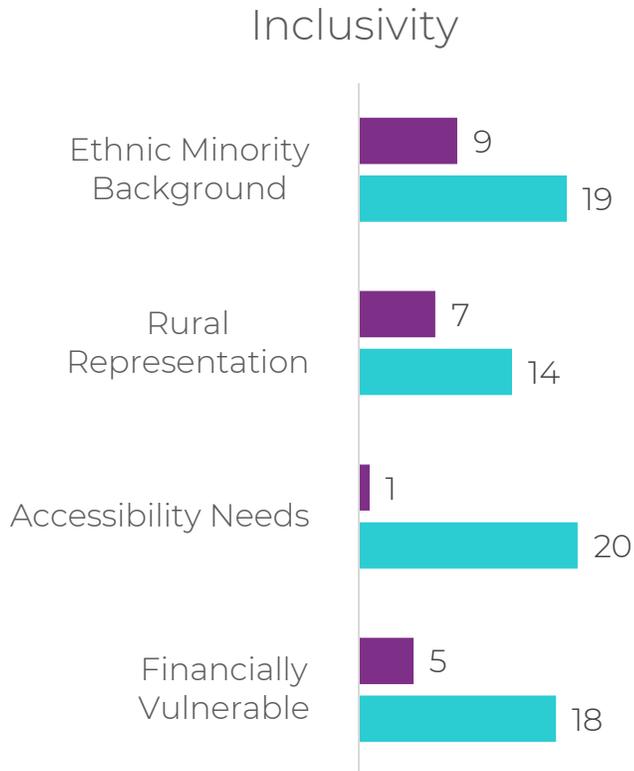
[ccw.org.uk](http://ccw.org.uk)

# Yorkshire Water

Community population



Yorkshire Water community members: 53



Note: Financial vulnerability is derived from income under 20k, receipt of any benefit and/or in receipt of a discounted water bill.

**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 community members who are on benefits, struggling to pay their bills or on a discounted water tariff the quota for financially vulnerable community members 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



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Topic	Jan 2026 Yorkshire Water community Agreement %	+/- difference % Yorkshire Water community Nov vs. Jan	Jan 2026 Total community Agreement %	+/- difference % Yorkshire Water community vs. Total community Jan 2026
Responsiveness (Always/often responsive)	32%	+5%	26%	+6%
Recent Experience (Positive recent experience)	45%	+3%	42%	+4%
General outlook (Positive outlook)	53%	+4%	47%	+6%
Communication (Fair/good communication)	49%	+11%	35%	+14%
Brand Connection (someone I'd really like and have a lot in common with)	30%	+8%	29%	+1%
Brand Momentum (salience) (on its way up/has a lot going for it)	32%	+8%	23%	+10%
Trust (a great deal/some trust)	53%	+11%	48%	+5%
Past 4 Week Interaction	38%	-13%	45%	-7%
Past 4 Week Disruption	13%	+13%	9%	+5%
Past 4 Week Water Quality Issues	10%	+5%	9%	+1%
Past 4 Week Sewerage issues	6%	+6%	4%	+2%
<b>Overall Value for Money</b>	49%	+7%	45%	+4%
<b>Overall Satisfaction – water (satisfied, scoring 7-10)</b>	59%	+14%	58%	+1%
Colour and Appearance	85%	+1%	84%	+1%
Taste and Smell	81%	-1%	78%	+3%
Safety of Drinking Water	87%	0%	79%	+8%
Reliability of Supply	87%	+2%	85%	+2%
Water Pressure	77%	0%	79%	-2%
<b>Overall Satisfaction – sewerage (satisfied, scoring 7-10)</b>	60%	+9%	57%	+4%
Reducing smells from sewage treatment works	66%	+26%	39%	+27%
Maintenance of sewerage pipes and treatment works	57%	+19%	41%	+15%
Cleaning wastewater properly before release back into environment	49%	+9%	36%	+13%
Minimising sewer flooding	55%	+8%	38%	+17%

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.

Note: Percentage change may be 1% higher or lower than expected, due to the need to round from different data sources

Total Base Size: 828 and Yorkshire Water Base Size: 53

# Executive summary

Overview of key findings



## Barometer

- There is an opportunity to more effectively communicate with community members surrounding price increases, infrastructure, and investment.
- There are some significant improvements compared to the first wave. Continue to build on this.



## Spotlight

- There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.
- Trust, when it comes to keeping water bills low, is comparatively high but there is an opportunity to clearly show how bill increases will be invested to improve services and to support community members with bill control.

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

**6.62/10 vs 6.51/10 (Total)**

**Why do community members feel this way?**

Many community members are broadly satisfied with core water supply, but there is significant frustration around cost, environmental impact, infrastructure, and communication.



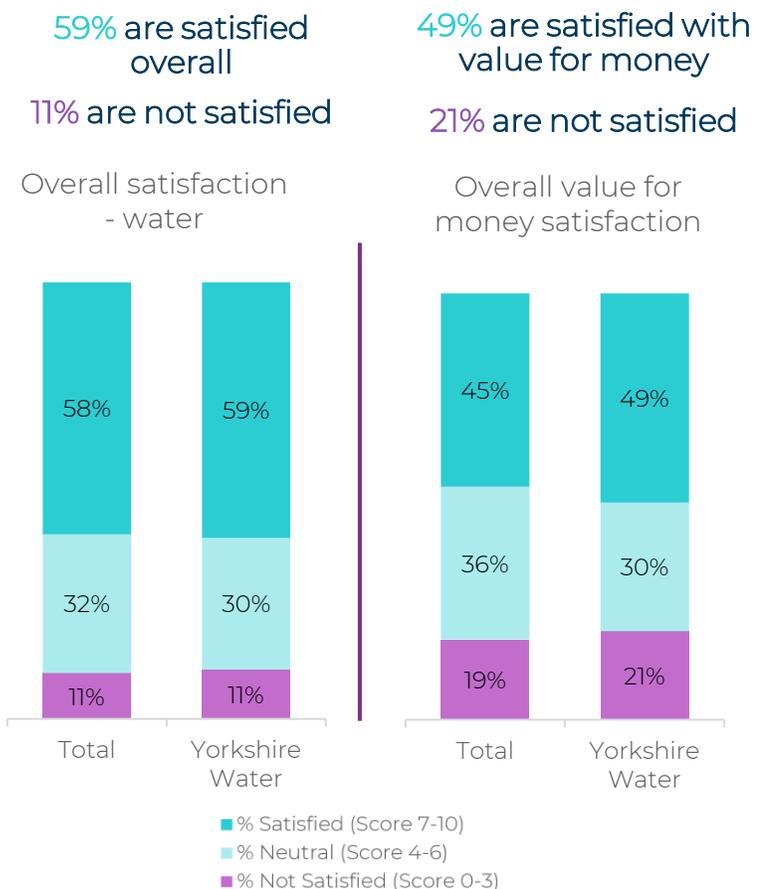
**Accountability call out:** There are currently no ad-hoc Accountability Session triggers in discussion across the surveys, community and CCW's external insights.



# Yorkshire Water: Barometer findings



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Both overall satisfaction and value for money satisfaction are in line with industry average. However, feedback is mixed. Although many community members are broadly satisfied with their core water supply, there is significant frustration around costs, environmental impact, infrastructure, and communication.

## Why have you given this overall satisfaction score?

*"It provides clean reliable water but I think the infrastructure is poor."*

Male, 22, Live with partner, 5/10 satisfaction score

*"No customer focus. They promised they would ring me to discuss my increased monthly direct debit and never did."*

Female, 50, Live with child/ren, 4/10 satisfaction score

*"It's ok but want to know more about what it does with money."*

Male, 20, Live with adult family members, 7/10 satisfaction score

There is an opportunity to more effectively communicate with community members surrounding price increases, infrastructure and investment.

Total Base Size: 828  
Yorkshire Water Base Size: 53



# Yorkshire Water: Barometer findings

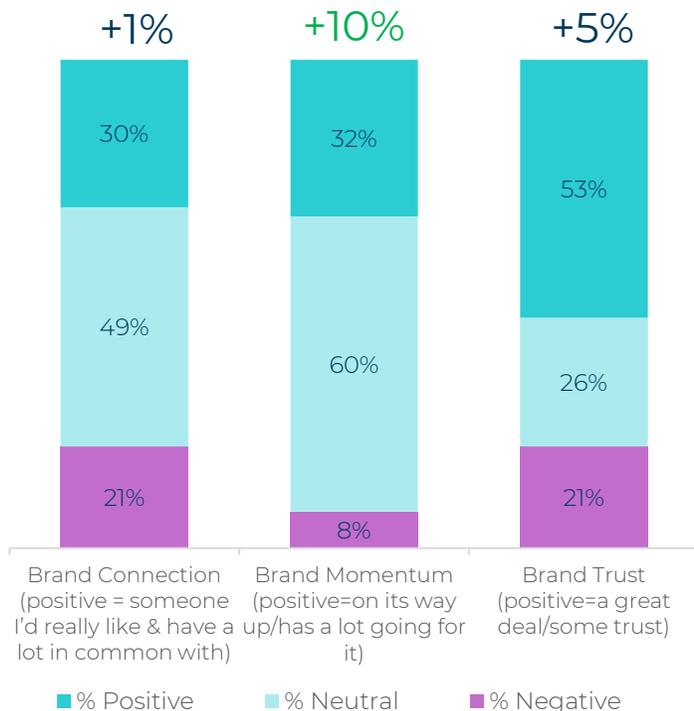
Brand perceptions and performance (satisfaction)



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

Perceptions of Water Company in relation to connection, momentum, and trust



% Who agree that Yorkshire Water...	January	+/- Difference vs. November	+/- Difference vs. Industry Average
Deliver great service for all community members	53%	+6%	+7%
Improves our rivers	32%	+1%	+6%
Creates a greener future	38%	+7%	+9%
Spends community members' money wisely	34%	+14%	+9%
Contributes to our communities	36%	0%	+3%

% Satisfied with...	January	+/- Difference vs. November	+/- Difference vs. Current Industry Average
<b>Water</b>			
Overall Satisfaction	59%	+14%	+1%
Colour and Appearance	85%	+1%	+1%
Taste and Smell	81%	-1%	+3%
Safety of Drinking Water	87%	0%	+8%
Reliability of Supply	87%	+2%	+2%
Water Pressure	77%	0%	-2%
<b>Sewerage</b>			
Overall Satisfaction	60%	+9%	+4%
Reducing smells from sewage treatment works	66%	+26%	+27%
Maintenance of sewerage pipes and treatment works	57%	+19%	+15%
Cleaning wastewater properly before release back into environment	49%	+9%	+13%
Minimising sewer flooding	55%	+8%	+17%

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

There are some significant improvements compared to the first wave. Continue to build on this.

Total Base Size: 828  
Yorkshire Water Base Size: 53



# Yorkshire Water: Spotlight findings

Billing and value for money



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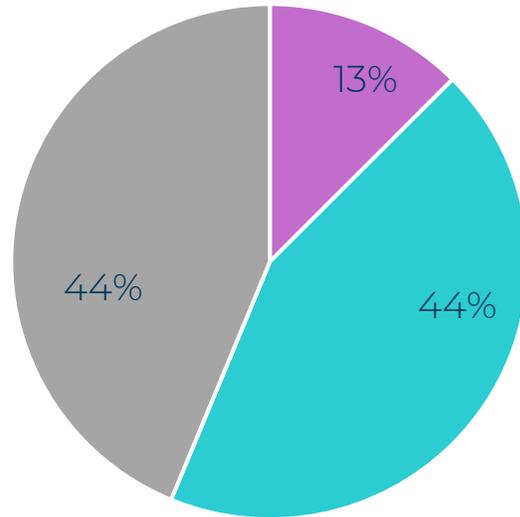
In this month's Spotlight survey, community members were asked to tell us about the themes that they want to discuss at their upcoming Accountability Sessions.

### Select the 3 most important themes

1. Value for money and rising bills - 52%
2. Reducing pollution and protecting rivers, seas, and the environment - 37%
3. Quality of drinking water - 37%

When asked to select the single most important topic, reducing pollution and protecting rivers, seas, and the environment was most selected at 20%.

How do you typically interact with your bill?



- I don't read my bill
- I just check the charges and the amount I owe
- I read all of my bill

The majority (88%) are looking at the charges on their bill, with 27% stating that they read the whole thing.

How charges are calculated (42%) and differences between water and wastewater charges (27%) were viewed as the most unclear parts of community member bills. 40% had no issues with the clarity of their bills.

Which, if any, parts of your bill from your provider do you find unclear?	%
How charges are calculated	42%
Differences between water and wastewater charges	27%
Meter readings / estimated usage	25%
Standing charges	25%
Comparison with previous bills	17%
Help or contact information	4%
Other	-
<b>None – my bill is clear</b>	<b>40%</b>

There is an opportunity to address billing clarity, particularly around how charges are calculated and differences between water and wastewater charges.



# Yorkshire Water: Spotlight findings

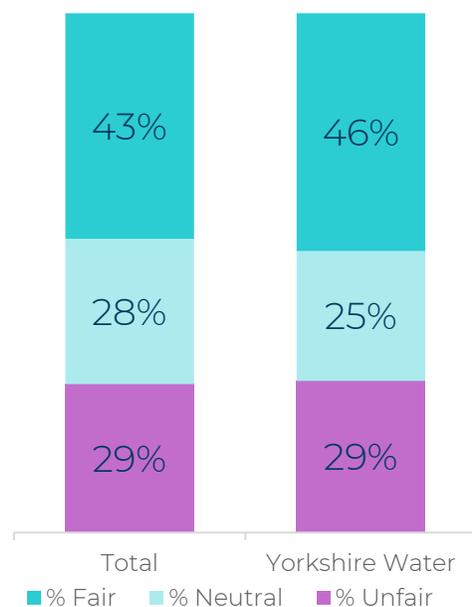
Billing and value for money



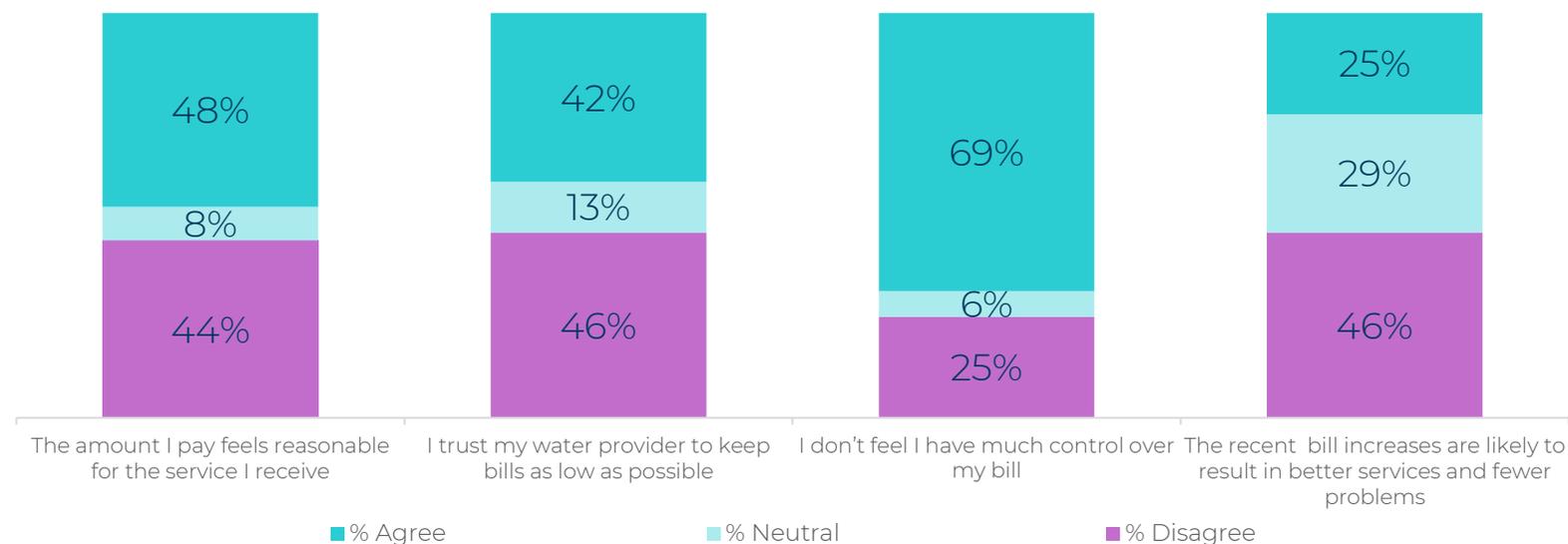
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46% of community members felt that the charges they pay are fair. 48% feel that the amount they pay feels reasonable for the service, and 42% trust their water provider to keep bills as low as possible. 69% feel they don't have much control over their bill, and 25% believe that recent bill increases are likely to result in better services and fewer problems.

How fair do you feel your charges are?



Please tell us how much you agree or disagree with the following statements:



Trust, when it comes to keeping water bills low, is comparatively high, but there is an opportunity to clearly show how bill increases will be invested to improve services and to support community members with bill control.

Total Base Size: 828  
Yorkshire Water Base Size: 53



# Yorkshire Water: Spotlight findings

What could Yorkshire Water do to improve your value for money perceptions?



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*“Would be interesting to see what is reinvested back into the water service and what is paid out in bonus/dividends, and if there is a reasonable balance between the two.”*

*45, Live with family*

*“More communication and a breakdown of where money is spent.”*

*47, Live with family*

*“Have someone in charge who is fully aware of all aspects of supply and customer service. Keep bills lower than the outrageous and unjustified increase last year and ensure future supply without interruptions caused by drought.”*

*71, Live with partner*

*“The owners need to have a strategy to pay down the debts they have and to outline a ten year investment plan.”*

*65, Live with partner*

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